WORKSHOP **ESTRATÉGICO**

*"Envisioning the **future** scenario for #VinoArgentino"*

Julio 2022
VÍA ZOOM

WINES OF ARGENTINA

LINK GRABACIÓN

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AGENDA

SESIÓN 1 | MARTES 05 JULIO

- Introducción: escenario actual y tendencias globales por Juan Park (Wine Intelligence).
- Estados Unidos: Perfil del Consumidor de Vino Argentino por Juan Park (Wine Intelligence).
- Q & A Session: Ante la pérdida de market share a nivel global, ¿qué puede hacer ARG y WofA para recuperar market share? Herramienta MIRO

SESIÓN 2 | MIÉRCOLES 06 JULIO

- Introducción a cargo de Carolina Tonnelier (AM Latam - WofA).
- Warm up: Los mercados de Latam a cargo de Rodrigo Lanari (Wine Intelligence).
- El Ecommerce en Brasil a cargo de la especialista Juliana Bispo de Mercado Livre.
- Q & A Session: Ante la pérdida de market share a nivel global, ¿qué puede hacer ARG y WofA para recuperar market share? Herramienta MIRO

SESIÓN 3 | JUEVES 07 JULIO

- Europa: Tendencias del mercado. Oportunidades para el Vino Argentino, por Phil Crozier (UK & Europe Manager - WofA).
- Q & A Session: Ante la pérdida de market share a nivel global, ¿qué puede hacer ARG y WofA para recuperar market share? Herramienta MIRO
- Conclusiones generales a cargo de Mónica Caamaño (Trivento y Directora de WofA).

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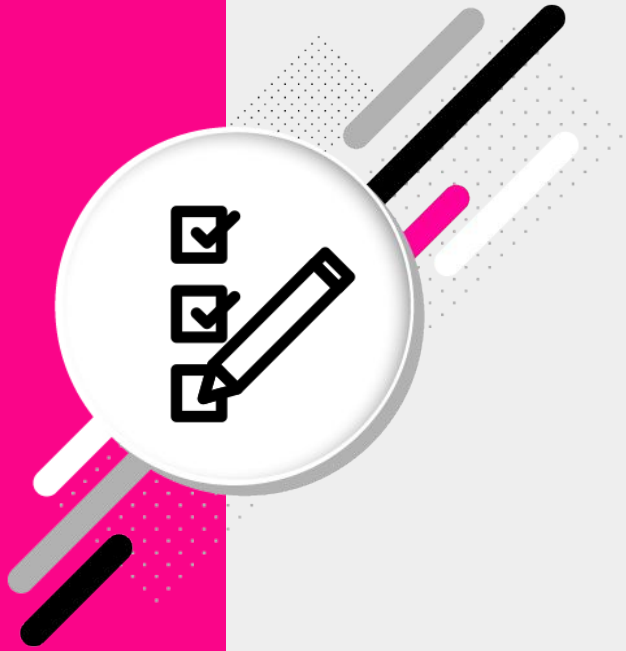

ENCUESTA DE GESTIÓN 2022

Link para responder:
https://forms.gle/h92RjkLBo4tkVdgx6

WINES OF ARGENTINA

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3

UK & EUROPE

Tendencias y oportunidades para ARGENTINA

Presentación de Mercados

WINES OF ARGENTINA

United Kingdom

Current Situation & Opportunities for Argentina 2022

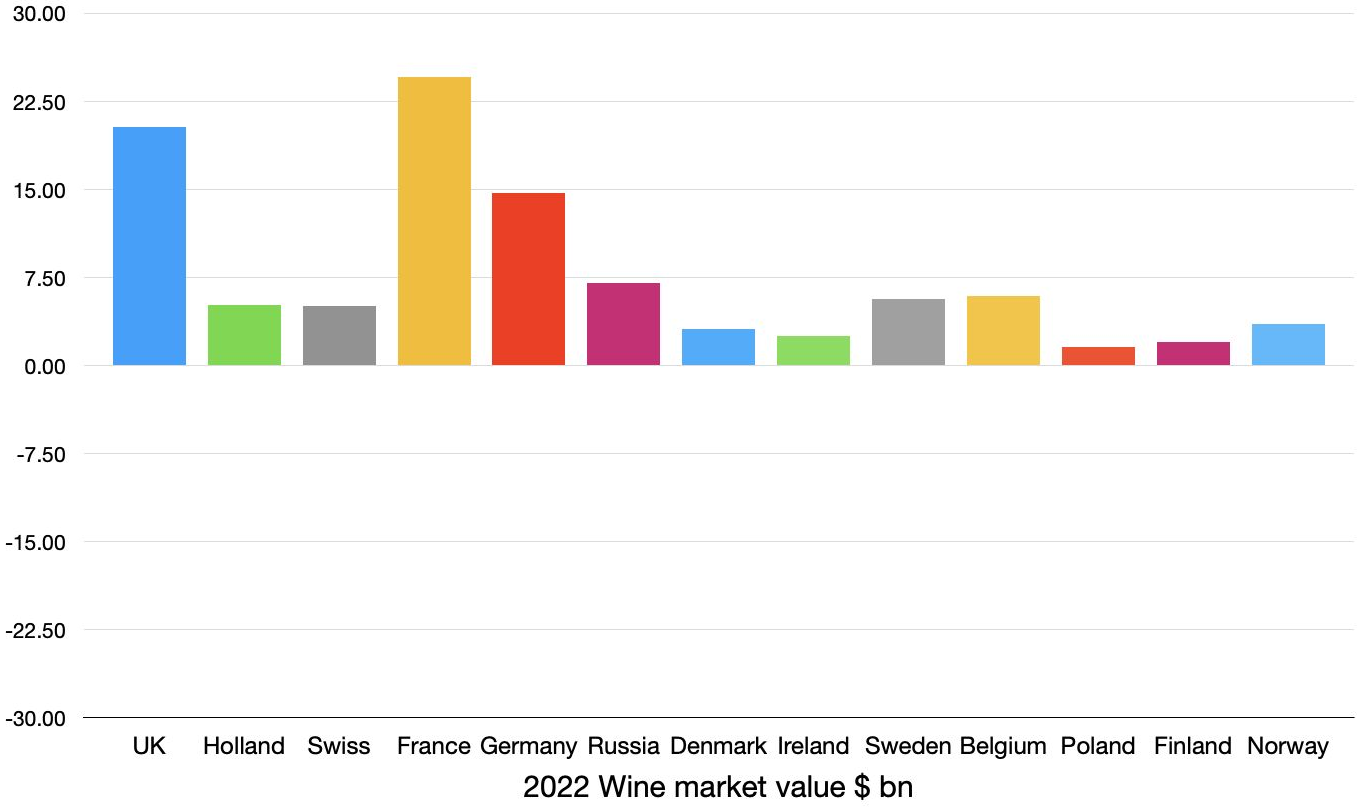
Phil Crozier

UK
MARKET

EUROPE
WINE MARKET VALUE & PREDICTIONS

Value of market 2022

Value of market $	2022 Wine market value $ bn	% change 2022	% change 2023
UK	20.29	5.50	1.50
Holland	5.11	-3.3	2
Swiss	5.03	-4.3	2.1
France	24.61	-1.6	2.5
Germany	14.71	5.5	1.1
Russia	7.06	-26.9	1.3
Ireland	2.48	10.4	5.7
Denmark	3.090	1.3	-0.4
Sweden	5.65	-17.1	3.1
Belgium	5.94	-4.4	3.2
Poland	1.57	-2.2	6.1
Finland	1.96	1.1	0.3
Norway	3.52	-9.3	-0.5



Source: Statistica

UK
MARKET

EUROPE
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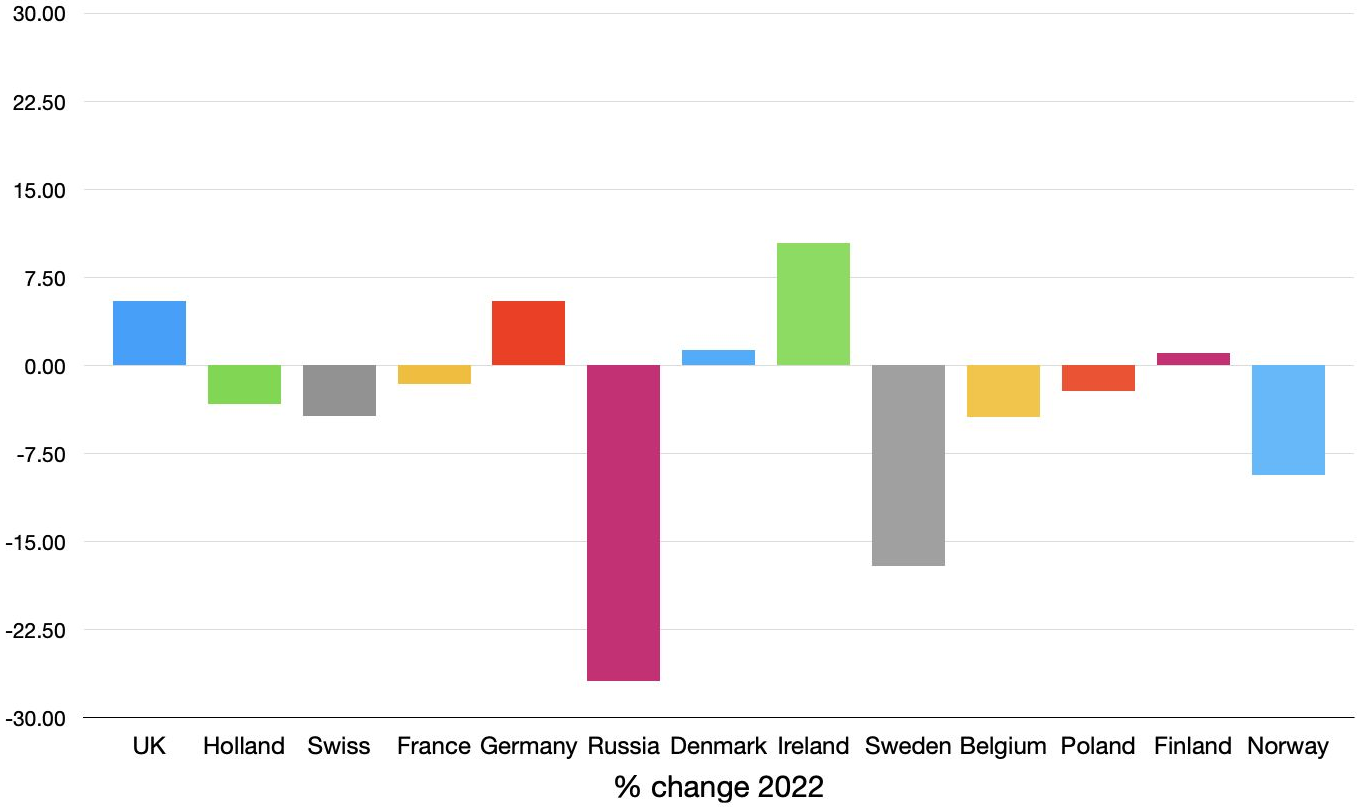

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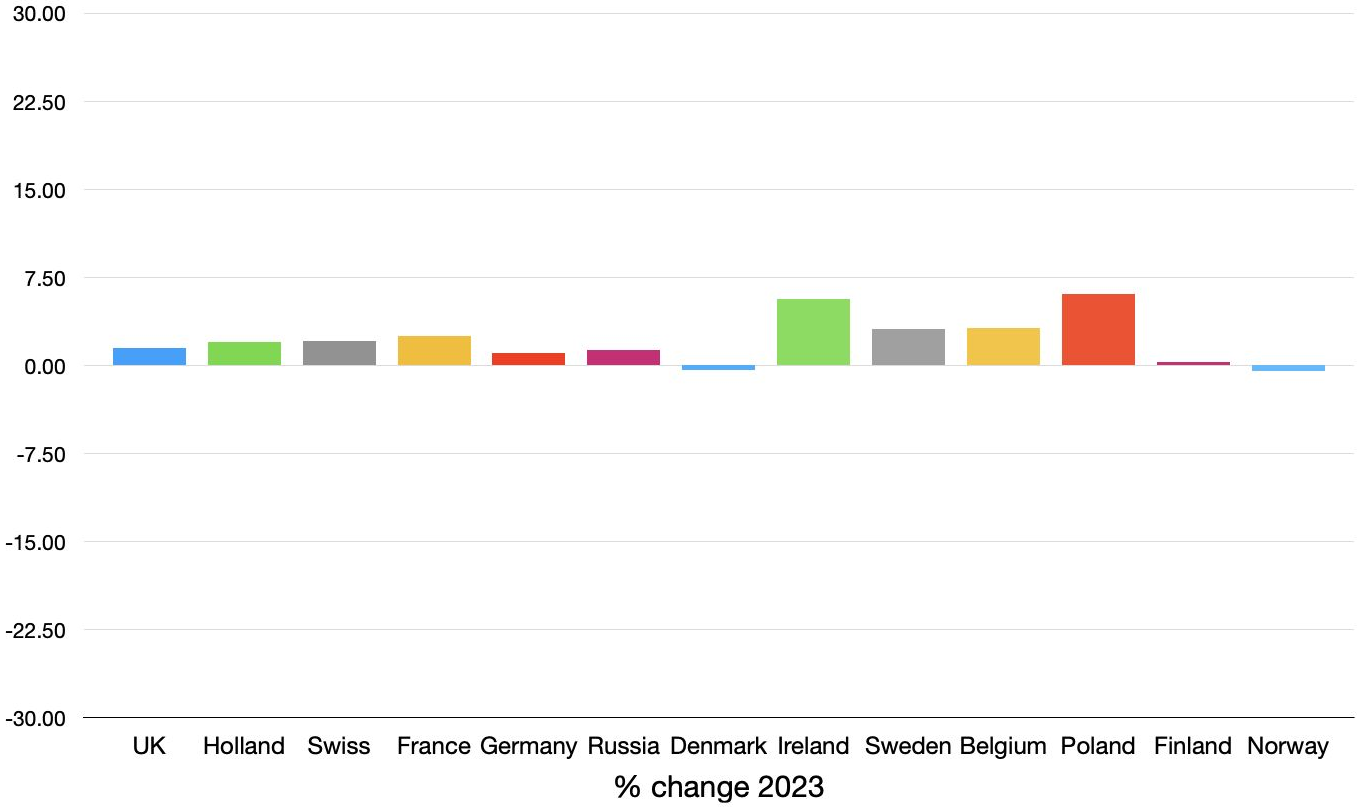
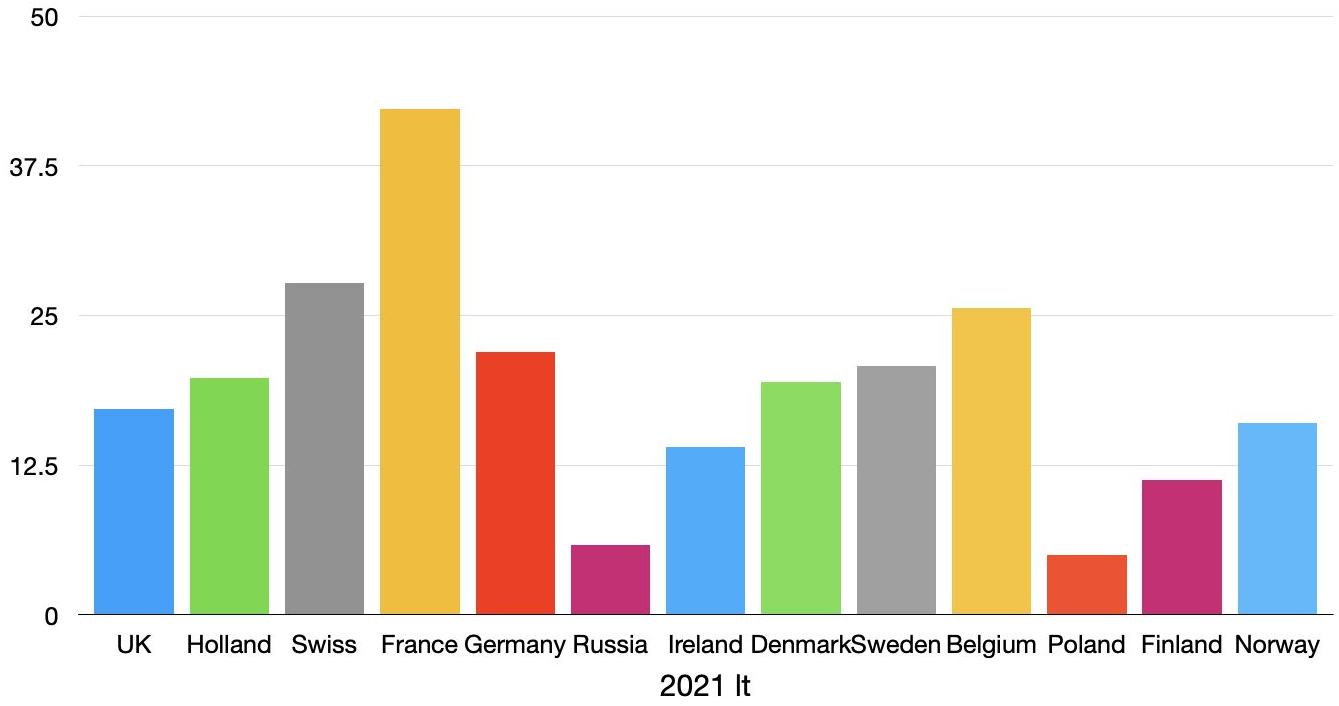


Source: Statistica

EUROPE
WINE CONSUMPTION Lt PER CAPITA

2021/2 Per Capita Consumption lt

Value of market €	2021 lt	2022 Lt
UK	17.21	18.37
Holland	19.79	20.36
Swiss	27.73	29.19
France	42.23	45.15
Germany	21.93	23.30
Russia	5.86	6.21
Ireland	14.00	16.05
Denmark	19.46	21.31
Sweden	20.80	20.92
Belgium	25.61	26.49
Poland	4.99	5.35
Finland	11.29	11.87
Norway	16.03	15.46



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UK
MARKET

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France	42.23	45.15
Germany	21.93	23.30
Russia	5.86	6.21
Ireland	14.00	16.05
Denmark	19.46	21.31
Sweden	20.80	20.92
Belgium	25.61	26.49
Poland	4.99	5.35
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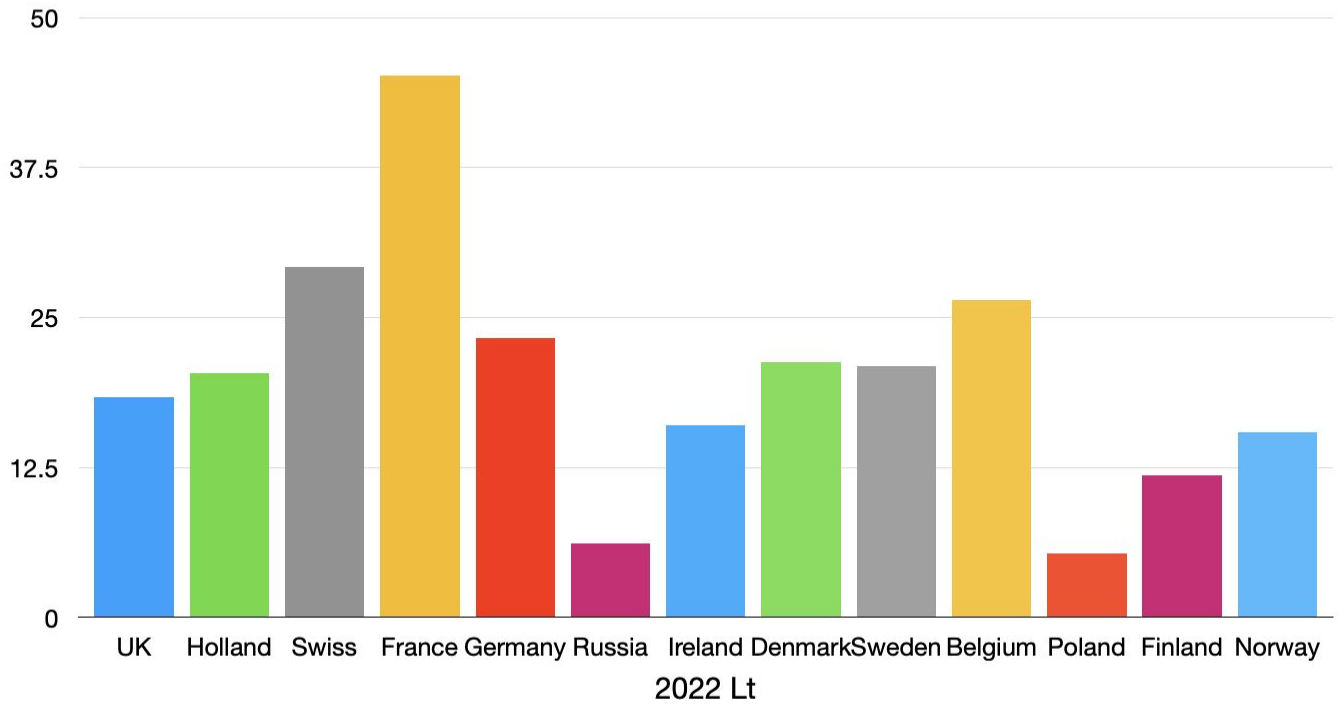


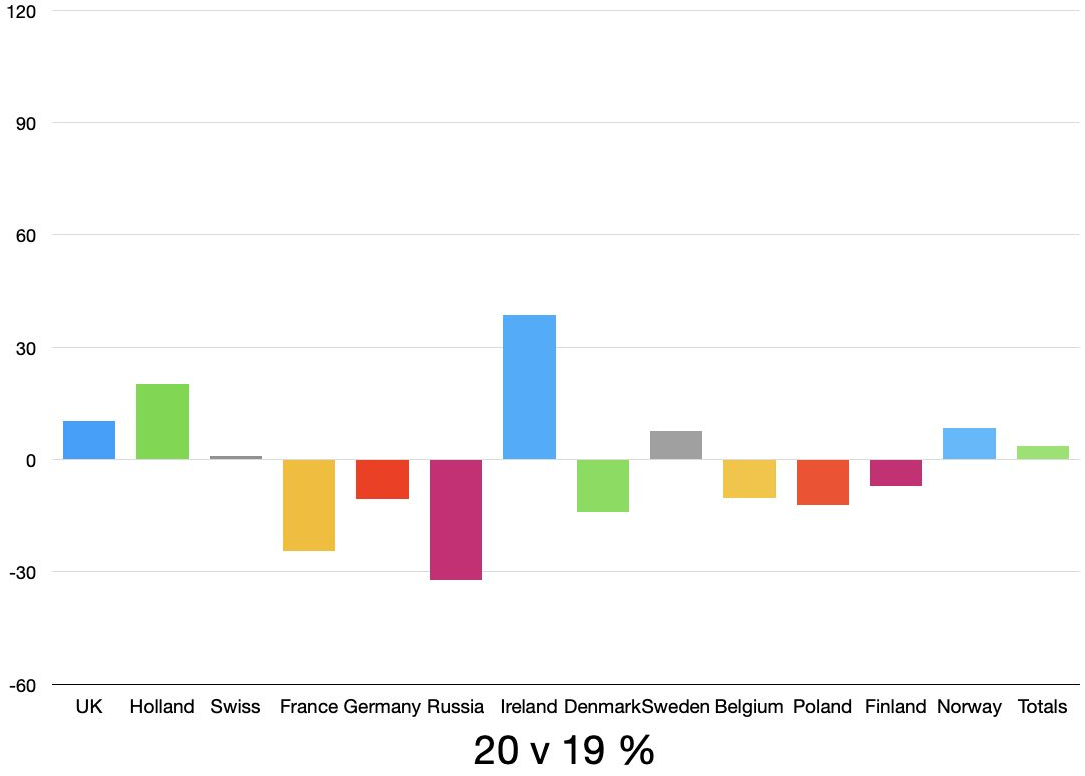
Source: Statistica

UK
MARKET

Table 1-1

	2019	2020	2021	20 v 19 %	21 v 20 %	21 v 19 %
UK	115,451	127,482	138,604	10	9	20
Holland	26,328	31,662	30,618	20	-3	16
Swiss	13,325	13,442	17,688	1	32	33
France	15,354	11,611	24,698	-24	113	61
Germany	16,348	14,608	14,577	-11	-0	-11
Russia	13,010	8,819	10,792	-32	22	-17
Ireland	8,934	12,378	10,214	39	-17	14
Denmark	12,171	10,461	11,271	-14	8	-7
Sweden	8,243	8,882	9,147	8	3	11
Belgium	6,981	6,258	7,799	-10	25	12
Poland	2,642	2,319	4,612	-12	99	75
Finland	4,243	3,948	4,271	-7	8	1
Norway	3,272	3,544	3,927	8	11	20
Totals	246,302	255,414	288,218	4	13	17

EUROPE
EXPORTS ARGENTINA % CHANGE



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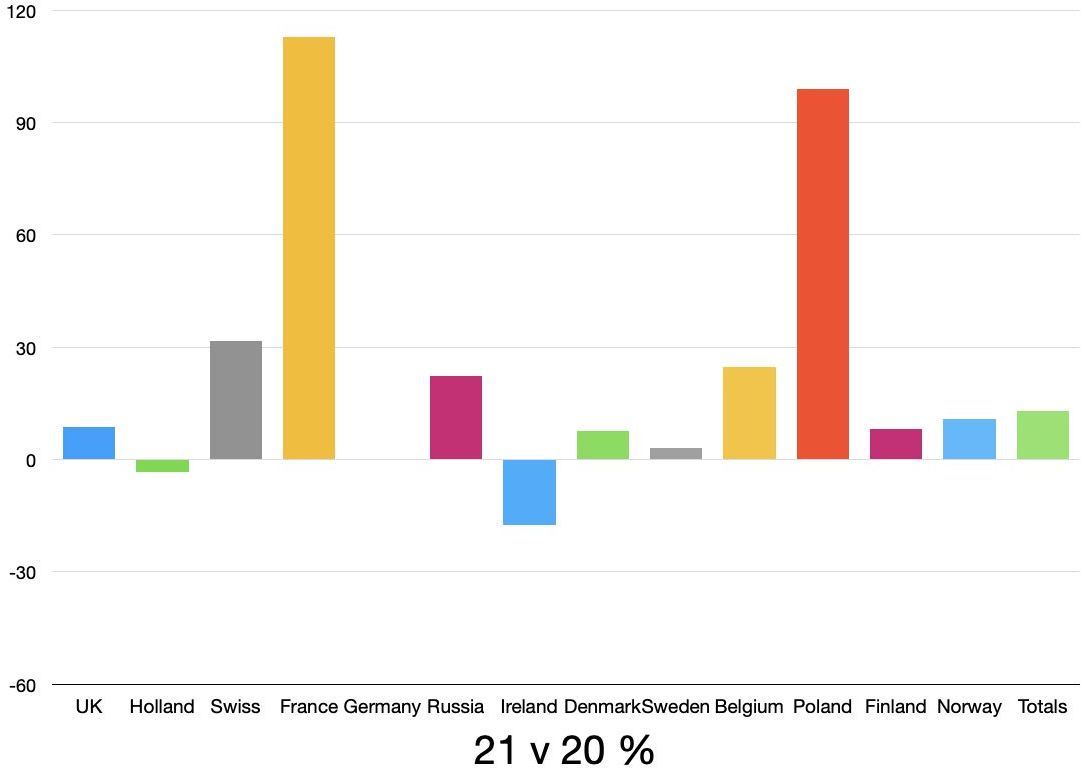

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EUROPE
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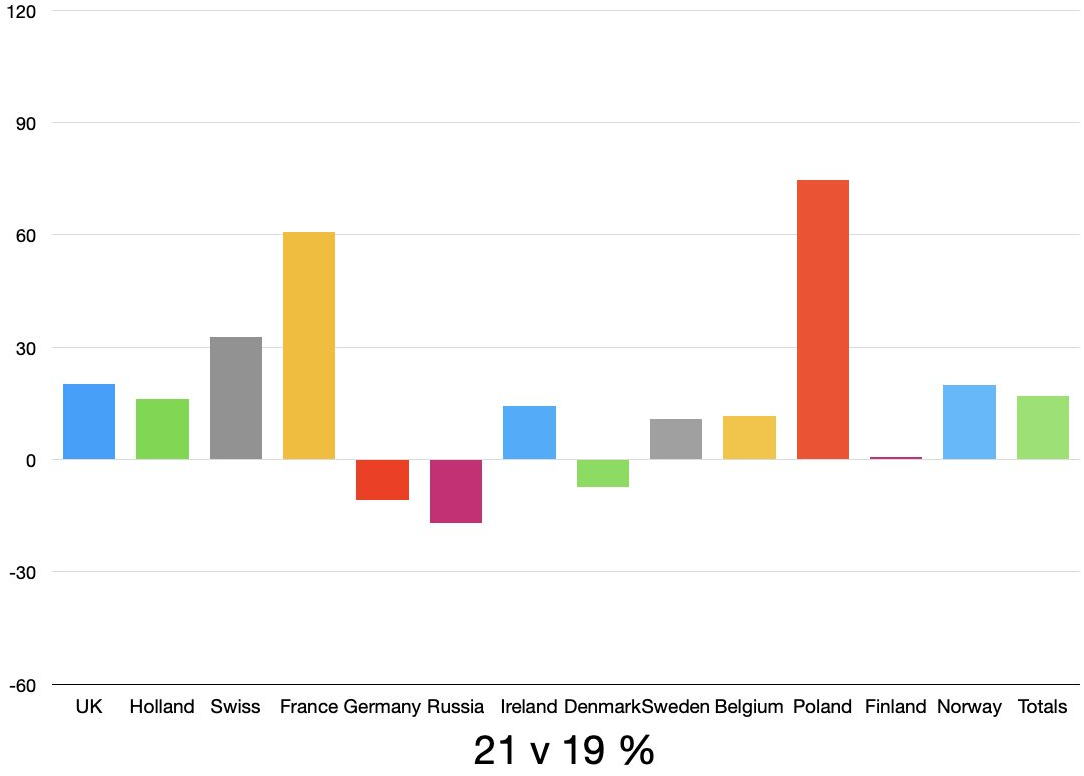
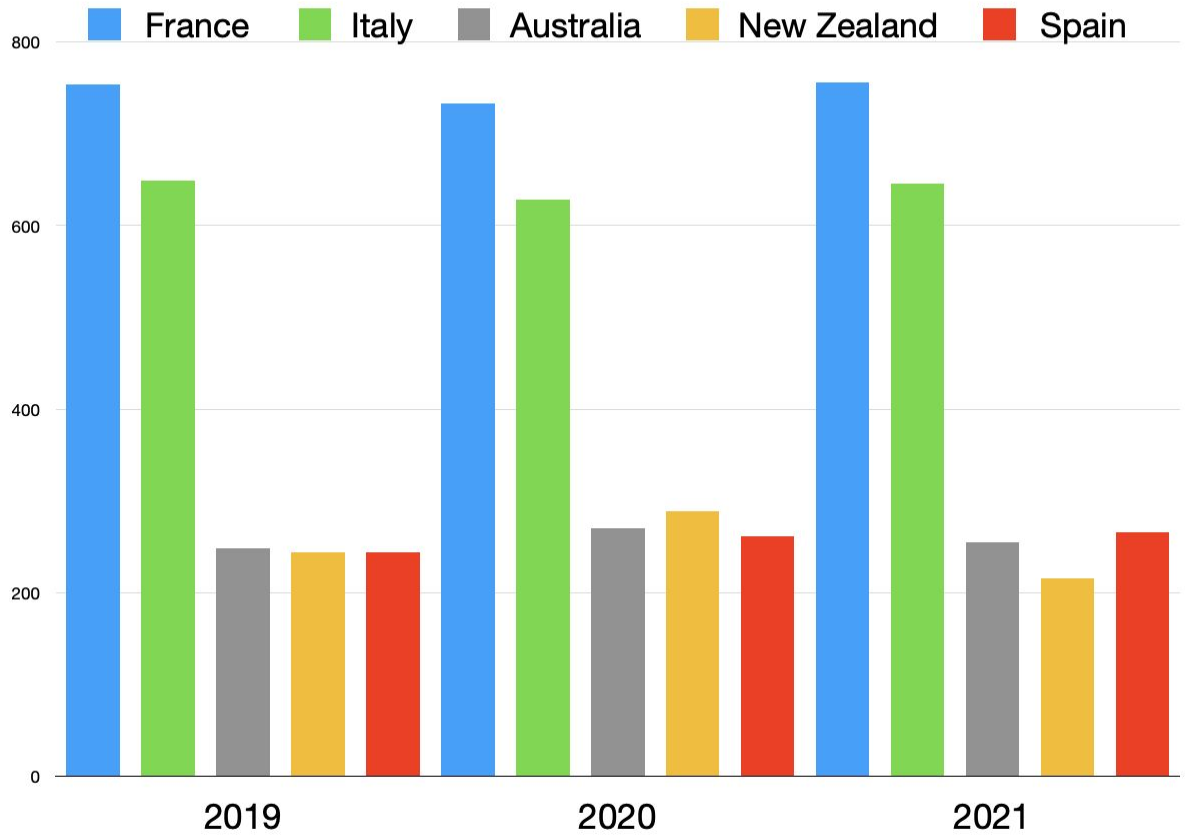


UK
MARKET

Table 1

Country	2019	2020	2021
France	754.2	733.2	755.8
Italy	648.8	627.9	645.7
Australia	248.7	270.1	255.2
New Zealand	244.7	289.4	215.9
Spain	244.3	261.6	265.8

UK
5 Biggest Exporters by Value $

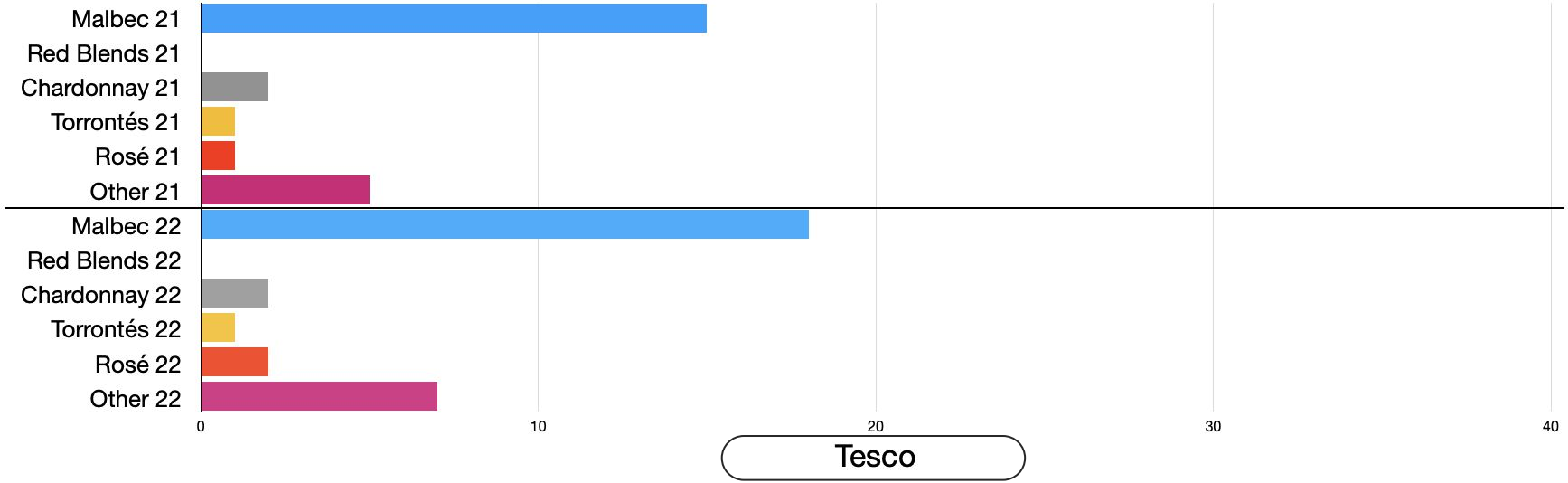


Source: Statistica

United Kingdom
Current Argentina Offering E-commerce Supermarkets 2022 vs 2021

Table 1-1

	Malbec 21	Red Blends 21	Chardonnay 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chardonnay 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Tesco	15	0	2	1	1	5	24	18	0	2	1	2	7	30
• Sainsburys	19	0	2	0	0	3	24	14	0	0	0	0	0	14
• Morrisons	8	0	1	1	1	10	21	13	0	0	0	1	1	14
• Co-op	6	0	0	0	1	0	7	7	3	1	1	1	5	18
• Asda	3	0	1	0	1	4	9	9	0	0	0	1	0	10
• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
• Lidl	5	0	1	0	0	0	7	1	0	0	1	0	0	2
• M&S	25	5	6	3	1	10	50	7	0	2	0	0	0	9
• Ocado	36	2	8	3	2	11	62	36	2	8	3	2	11	62
Totals	138	10	23	10	8	46	236	129	9	16	7	10	30	201



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	Malbec 21	Red Blends 21	Chardonnay 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chardonnay 22	Torrontés 22	Rosé 22	Other 22	Total 22
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• Sainsburys	19	0	2	0	0	3	24	14	0	0	0	0	0	14
• Morrisons	8	0	1	1	1	10	21	13	0	0	0	1	1	14
• Co-op	6	0	0	0	1	0	7	7	3	1	1	1	5	18
• Asda	3	0	1	0	1	4	9	9	0	0	0	1	0	10
• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
• Lidl	5	0	1	0	0	0	7	1	0	0	1	0	0	2
• M&S	25	5	6	3	1	10	50	7	0	2	0	0	0	9
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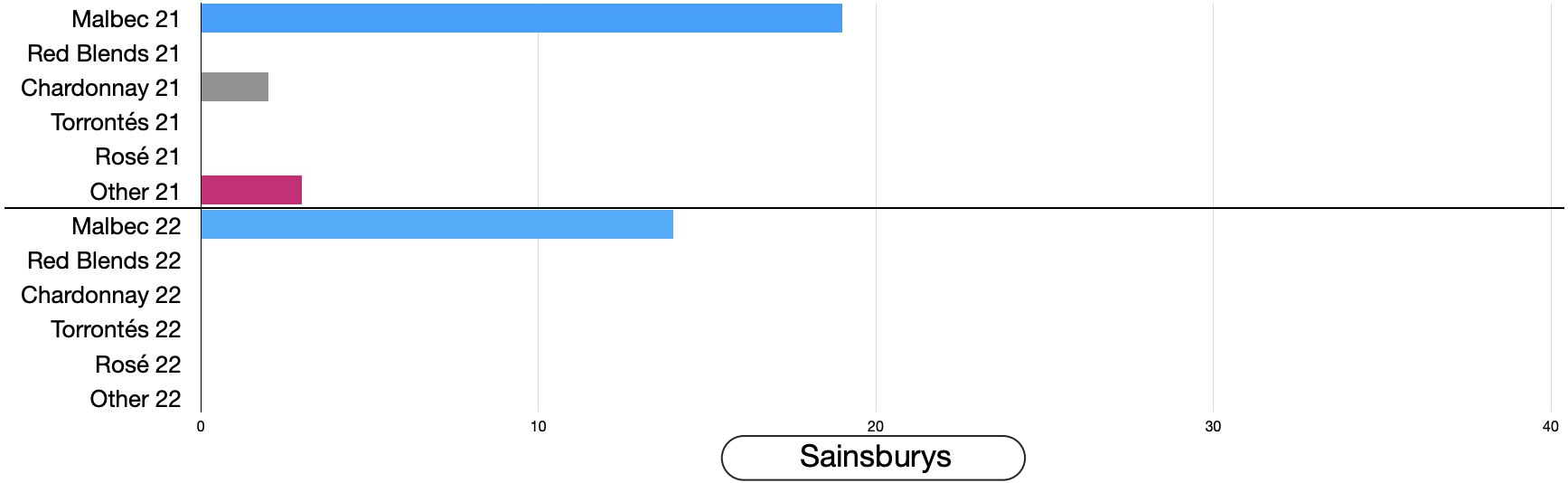

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• Co-op	6	0	0	0	1	0	7	7	3	1	1	1	5	18
• Asda	3	0	1	0	1	4	9	9	0	0	0	1	0	10
• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
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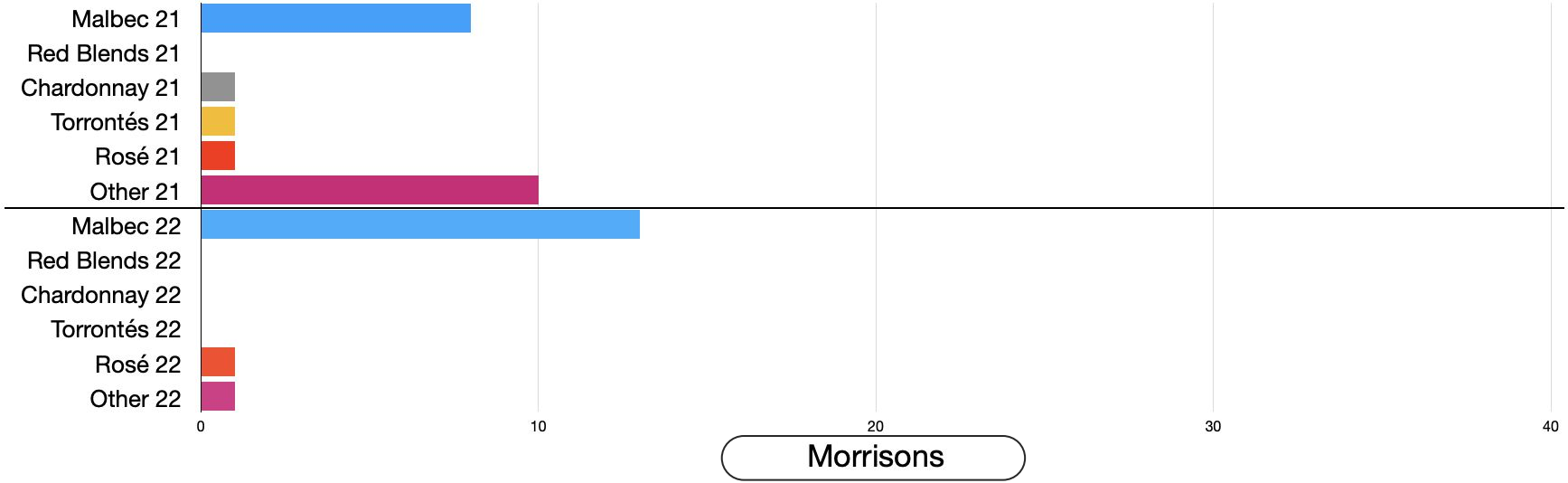

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• Morrisons	8	0	1	1	1	10	21	13	0	0	0	1	1	14
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• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
• Lidl	5	0	1	0	0	0	7	1	0	0	1	0	0	2
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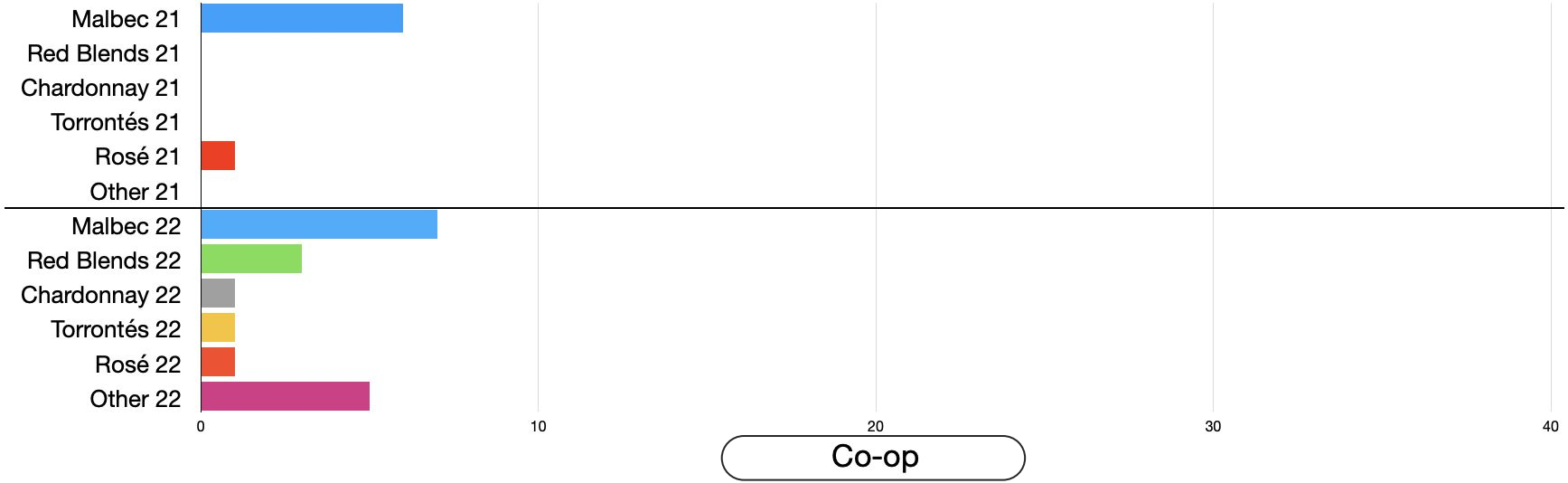

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• Tesco	15	0	2	1	1	5	24	18	0	2	1	2	7	30
• Sainsburys	19	0	2	0	0	3	24	14	0	0	0	0	0	14
• Morrisons	8	0	1	1	1	10	21	13	0	0	0	1	1	14
• Co-op	6	0	0	0	1	0	7	7	3	1	1	1	5	18
• Asda	3	0	1	0	1	4	9	9	0	0	0	1	0	10
• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
• Lidl	5	0	1	0	0	0	7	1	0	0	1	0	0	2
• M&S	25	5	6	3	1	10	50	7	0	2	0	0	0	9
• Ocado	36	2	8	3	2	11	62	36	2	8	3	2	11	62
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• Tesco	15	0	2	1	1	5	24	18	0	2	1	2	7	30
• Sainsburys	19	0	2	0	0	3	24	14	0	0	0	0	0	14
• Morrisons	8	0	1	1	1	10	21	13	0	0	0	1	1	14
• Co-op	6	0	0	0	1	0	7	7	3	1	1	1	5	18
• Asda	3	0	1	0	1	4	9	9	0	0	0	1	0	10
• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
• Lidl	5	0	1	0	0	0	7	1	0	0	1	0	0	2
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• Sainsburys	19	0	2	0	0	3	24	14	0	0	0	0	0	14
• Morrisons	8	0	1	1	1	10	21	13	0	0	0	1	1	14
• Co-op	6	0	0	0	1	0	7	7	3	1	1	1	5	18
• Asda	3	0	1	0	1	4	9	9	0	0	0	1	0	10
• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
• Lidl	5	0	1	0	0	0	7	1	0	0	1	0	0	2
• M&S	25	5	6	3	1	10	50	7	0	2	0	0	0	9
• Ocado	36	2	8	3	2	11	62	36	2	8	3	2	11	62
Totals	138	10	23	10	8	46	236	129	9	16	7	10	30	201

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Table 1-1

	Malbec 21	Red Blends 21	Chardonnay 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chardonnay 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Tesco	15	0	2	1	1	5	24	18	0	2	1	2	7	30
• Sainsburys	19	0	2	0	0	3	24	14	0	0	0	0	0	14
• Morrisons	8	0	1	1	1	10	21	13	0	0	0	1	1	14
• Co-op	6	0	0	0	1	0	7	7	3	1	1	1	5	18
• Asda	3	0	1	0	1	4	9	9	0	0	0	1	0	10
• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
• Lidl	5	0	1	0	0	0	7	1	0	0	1	0	0	2
• M&S	25	5	6	3	1	10	50	7	0	2	0	0	0	9
• Ocado	36	2	8	3	2	11	62	36	2	8	3	2	11	62
Totals	138	10	23	10	8	46	236	129	9	16	7	10	30	201

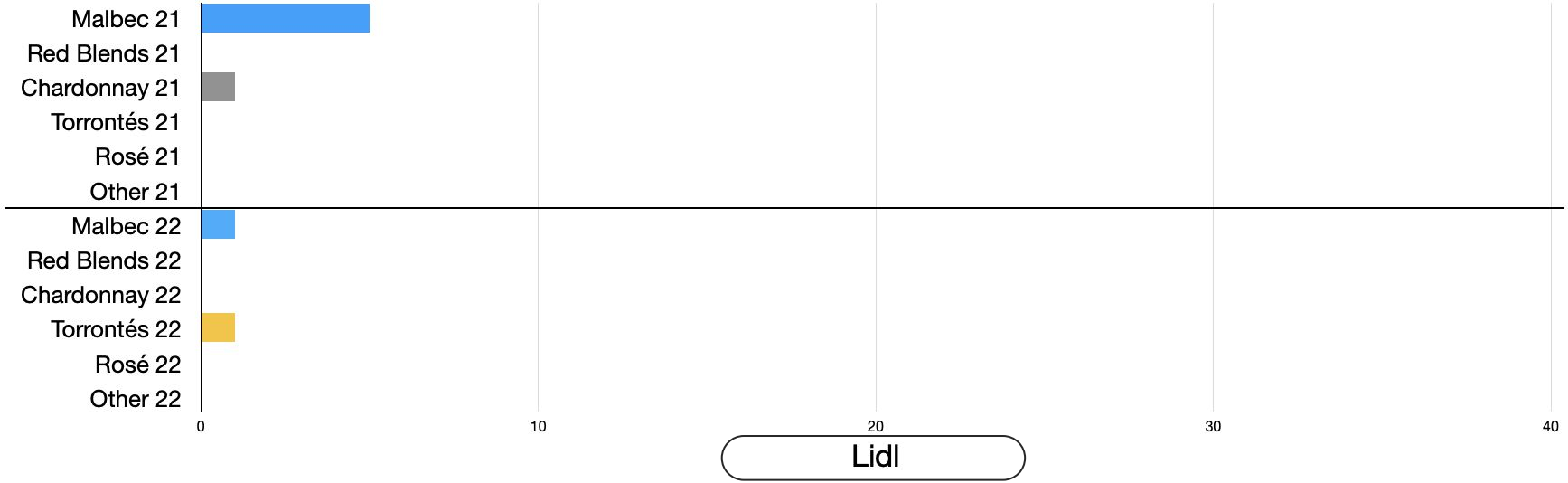

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Table 1-1

	Malbec 21	Red Blends 21	Chardonnay 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chardonnay 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Tesco	15	0	2	1	1	5	24	18	0	2	1	2	7	30
• Sainsburys	19	0	2	0	0	3	24	14	0	0	0	0	0	14
• Morrisons	8	0	1	1	1	10	21	13	0	0	0	1	1	14
• Co-op	6	0	0	0	1	0	7	7	3	1	1	1	5	18
• Asda	3	0	1	0	1	4	9	9	0	0	0	1	0	10
• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
• Lidl	5	0	1	0	0	0	7	1	0	0	1	0	0	2
• M&S	25	5	6	3	1	10	50	7	0	2	0	0	0	9
• Ocado	36	2	8	3	2	11	62	36	2	8	3	2	11	62
Totals	138	10	23	10	8	46	236	129	9	16	7	10	30	201

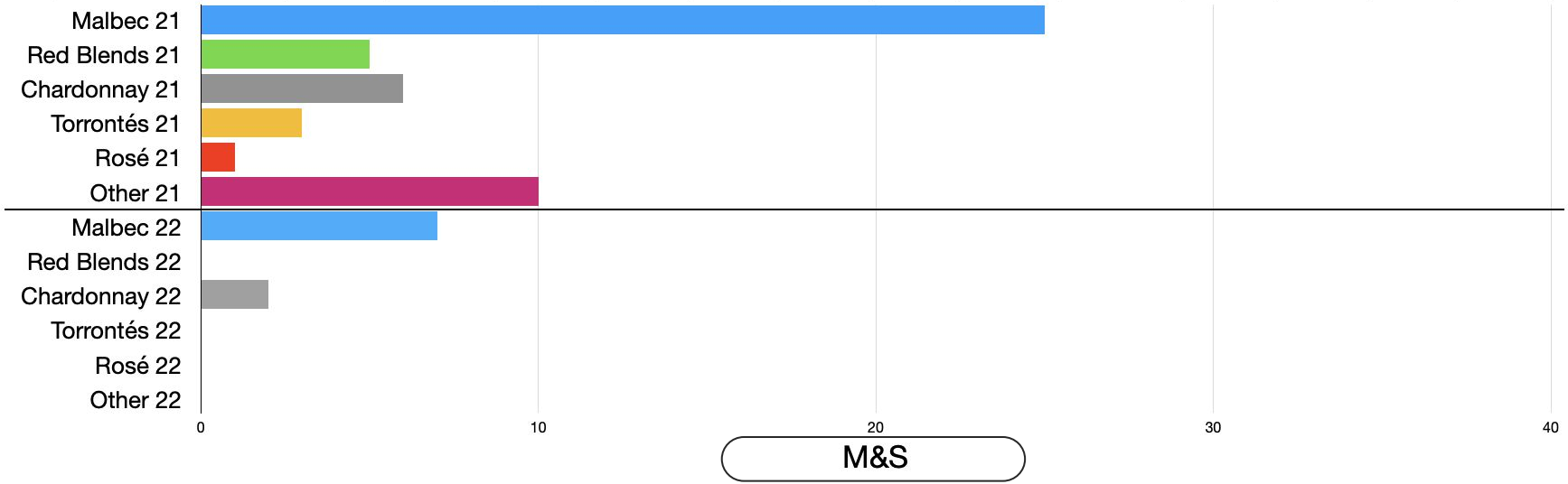

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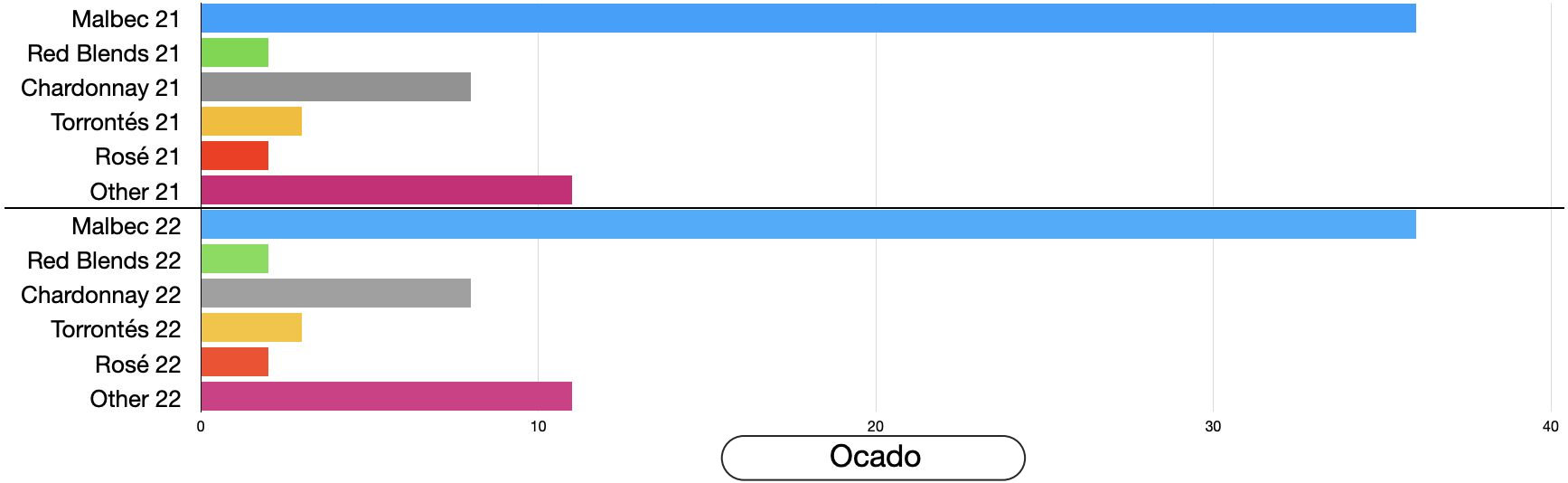
Table 1-1

	Malbec 21	Red Blends 21	Chardonnay 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chardonnay 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Tesco	15	0	2	1	1	5	24	18	0	2	1	2	7	30
• Sainsburys	19	0	2	0	0	3	24	14	0	0	0	0	0	14
• Morrisons	8	0	1	1	1	10	21	13	0	0	0	1	1	14
• Co-op	6	0	0	0	1	0	7	7	3	1	1	1	5	18
• Asda	3	0	1	0	1	4	9	9	0	0	0	1	0	10
• Aldi	1	0	0	1	0	0	2	4	0	0	0	0	3	7
• Waitrose	20	3	2	1	1	3	30	20	4	3	1	3	3	35
• Lidl	5	0	1	0	0	0	7	1	0	0	1	0	0	2
• M&S	25	5	6	3	1	10	50	7	0	2	0	0	0	9
• Ocado	36	2	8	3	2	11	62	36	2	8	3	2	11	62
Totals	138	10	23	10	8	46	236	129	9	16	7	10	30	201



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United Kingdom
Current Argentine offering E-commerce
Online Nationals
2022 vs 2021

Table 1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Majestic	35	4	5	1	1	4	50	37	3	6	1	1	4	52
• Virgin wines	5	3	1	0	0	5	15	10	3	1	0	0	1	15
• Laithwaites	10	6	1	1	1	3	22	20	9	1	1	1	4	36
• Wine society	6	6	0	1	0	1	14	8	4	1	1	0	3	17
• House of Townend	8	3	0	2	0	11	24	8	3	0	1	0	12	24
• BBR	5	8	1	0	0	0	14	18	12	1	0	0	0	30
• Tanners	7	1	2	2	0	6	18	10	3	1	3	0	4	21
• Corney & Barrow	13	2	0	2	0	6	23	9	3	0	0	0	6	18

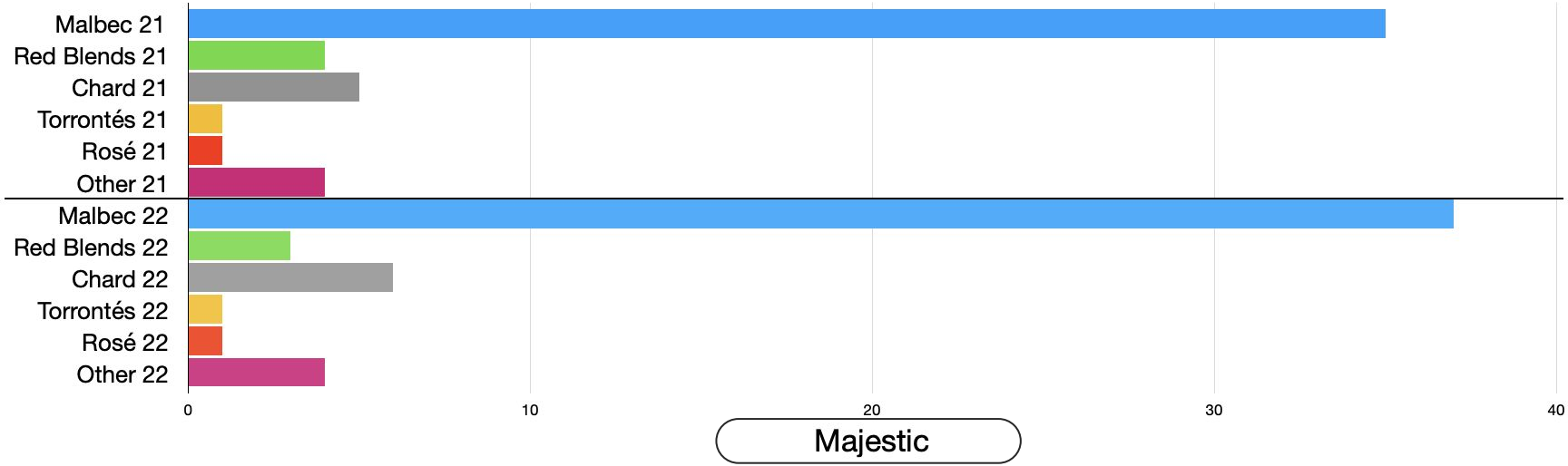

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Table 1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Majestic	35	4	5	1	1	4	50	37	3	6	1	1	4	52
• Virgin wines	5	3	1	0	0	5	15	10	3	1	0	0	1	15
• Laithwaites	10	6	1	1	1	3	22	20	9	1	1	1	4	36
• Wine society	6	6	0	1	0	1	14	8	4	1	1	0	3	17
• House of Townend	8	3	0	2	0	11	24	8	3	0	1	0	12	24
• BBR	5	8	1	0	0	0	14	18	12	1	0	0	0	30
• Tanners	7	1	2	2	0	6	18	10	3	1	3	0	4	21
• Corney & Barrow	13	2	0	2	0	6	23	9	3	0	0	0	6	18

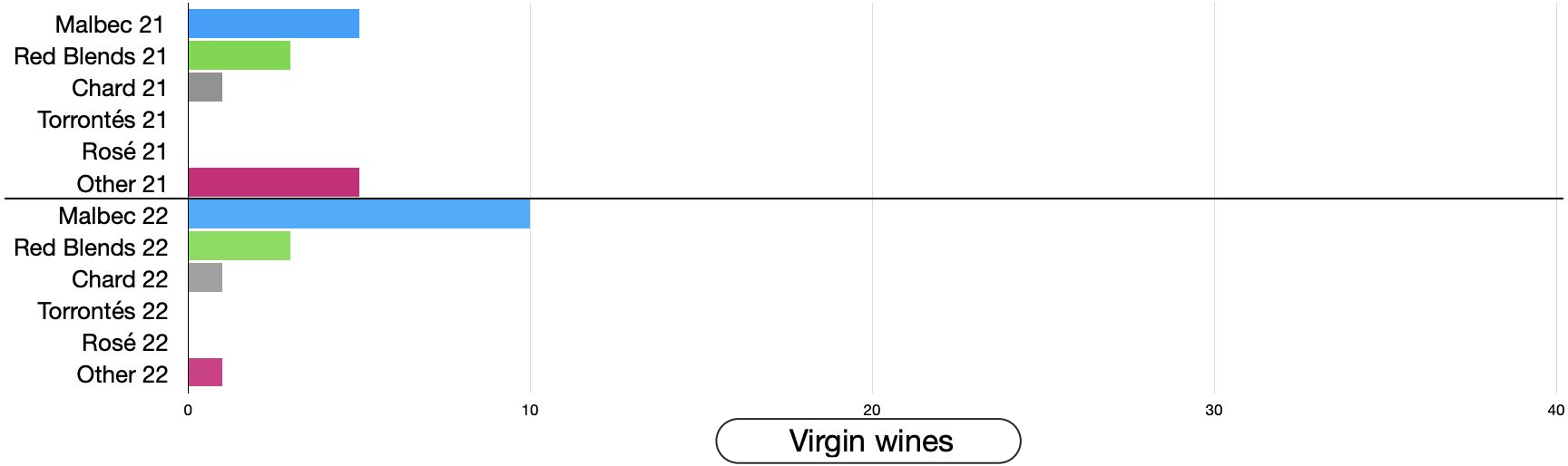


Table 1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Majestic	35	4	5	1	1	4	50	37	3	6	1	1	4	52
• Virgin wines	5	3	1	0	0	5	15	10	3	1	0	0	1	15
• Laithwaites	10	6	1	1	1	3	22	20	9	1	1	1	4	36
• Wine society	6	6	0	1	0	1	14	8	4	1	1	0	3	17
• House of Townend	8	3	0	2	0	11	24	8	3	0	1	0	12	24
• BBR	5	8	1	0	0	0	14	18	12	1	0	0	0	30
• Tanners	7	1	2	2	0	6	18	10	3	1	3	0	4	21
• Corney & Barrow	13	2	0	2	0	6	23	9	3	0	0	0	6	18

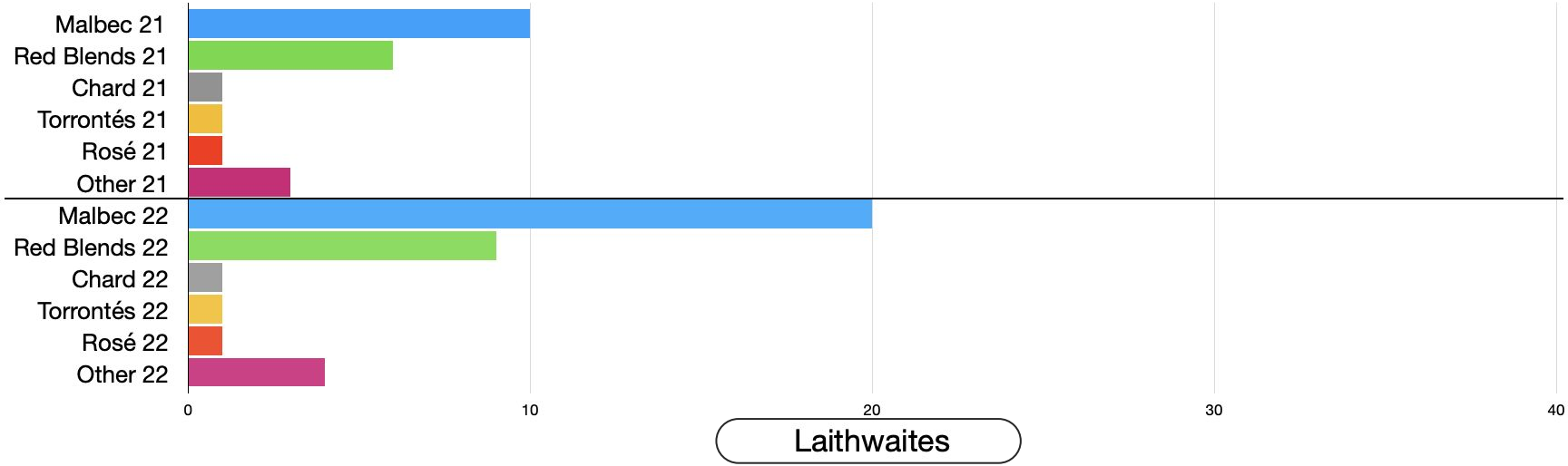


Table 1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Majestic	35	4	5	1	1	4	50	37	3	6	1	1	4	52
• Virgin wines	5	3	1	0	0	5	15	10	3	1	0	0	1	15
• Laithwaites	10	6	1	1	1	3	22	20	9	1	1	1	4	36
• Wine society	6	6	0	1	0	1	14	8	4	1	1	0	3	17
• House of Townend	8	3	0	2	0	11	24	8	3	0	1	0	12	24
• BBR	5	8	1	0	0	0	14	18	12	1	0	0	0	30
• Tanners	7	1	2	2	0	6	18	10	3	1	3	0	4	21
• Corney & Barrow	13	2	0	2	0	6	23	9	3	0	0	0	6	18

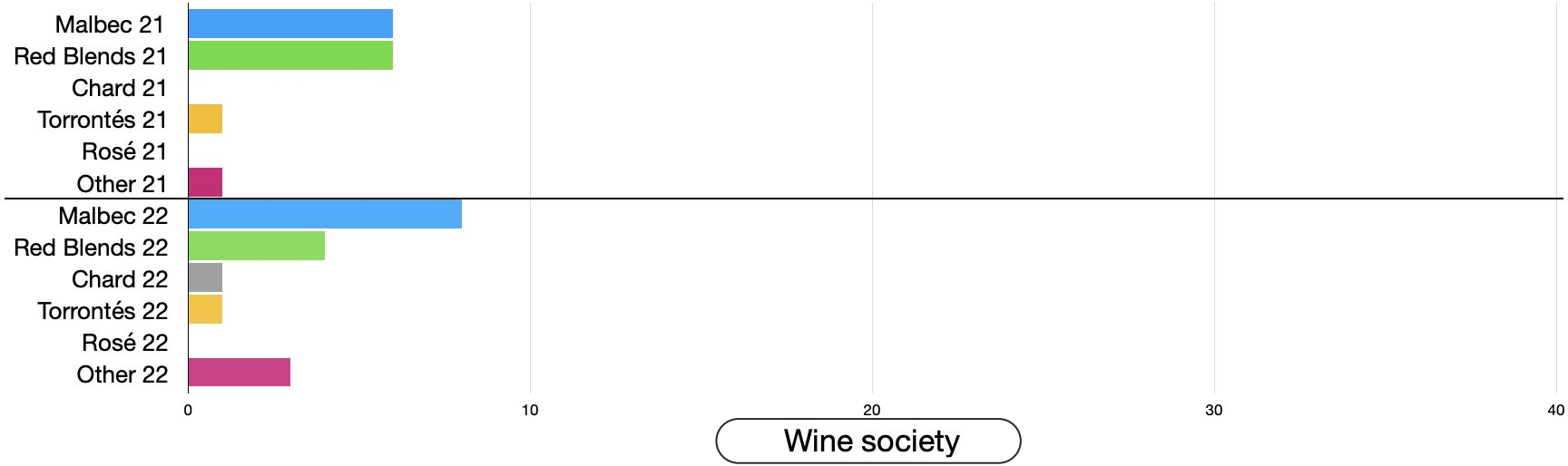


Table 1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Majestic	35	4	5	1	1	4	50	37	3	6	1	1	4	52
• Virgin wines	5	3	1	0	0	5	15	10	3	1	0	0	1	15
• Laithwaites	10	6	1	1	1	3	22	20	9	1	1	1	4	36
• Wine society	6	6	0	1	0	1	14	8	4	1	1	0	3	17
• House of Townend	8	3	0	2	0	11	24	8	3	0	1	0	12	24
• BBR	5	8	1	0	0	0	14	18	12	1	0	0	0	30
• Tanners	7	1	2	2	0	6	18	10	3	1	3	0	4	21
• Corney & Barrow	13	2	0	2	0	6	23	9	3	0	0	0	6	18

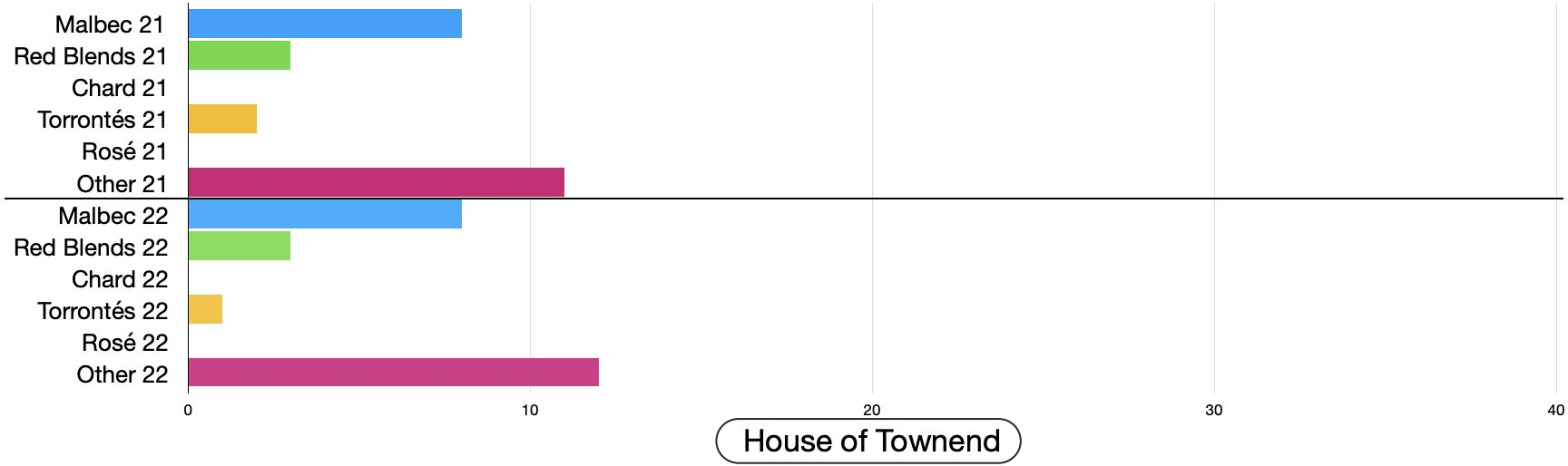


Table 1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Majestic	35	4	5	1	1	4	50	37	3	6	1	1	4	52
• Virgin wines	5	3	1	0	0	5	15	10	3	1	0	0	1	15
• Laithwaites	10	6	1	1	1	3	22	20	9	1	1	1	4	36
• Wine society	6	6	0	1	0	1	14	8	4	1	1	0	3	17
• House of Townend	8	3	0	2	0	11	24	8	3	0	1	0	12	24
• BBR	5	8	1	0	0	0	14	18	12	1	0	0	0	30
• Tanners	7	1	2	2	0	6	18	10	3	1	3	0	4	21
• Corney & Barrow	13	2	0	2	0	6	23	9	3	0	0	0	6	18

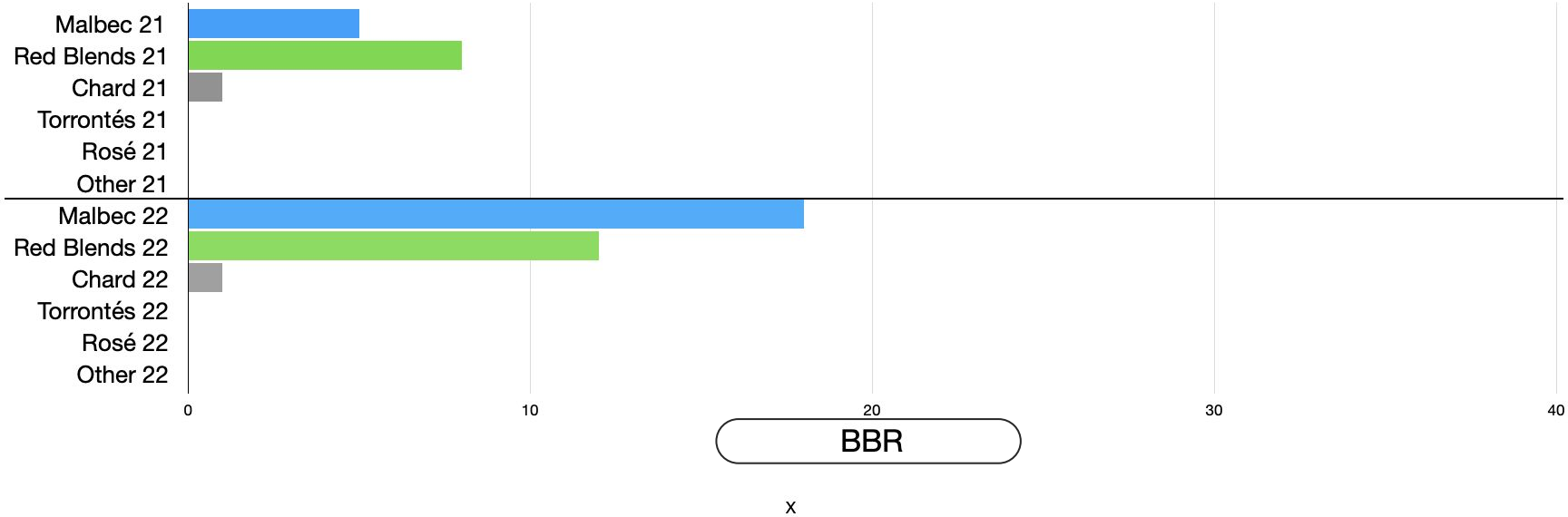


Table 1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Majestic	35	4	5	1	1	4	50	37	3	6	1	1	4	52
• Virgin wines	5	3	1	0	0	5	15	10	3	1	0	0	1	15
• Laithwaites	10	6	1	1	1	3	22	20	9	1	1	1	4	36
• Wine society	6	6	0	1	0	1	14	8	4	1	1	0	3	17
• House of Townend	8	3	0	2	0	11	24	8	3	0	1	0	12	24
• BBR	5	8	1	0	0	0	14	18	12	1	0	0	0	30
• Tanners	7	1	2	2	0	6	18	10	3	1	3	0	4	21
• Corney & Barrow	13	2	0	2	0	6	23	9	3	0	0	0	6	18

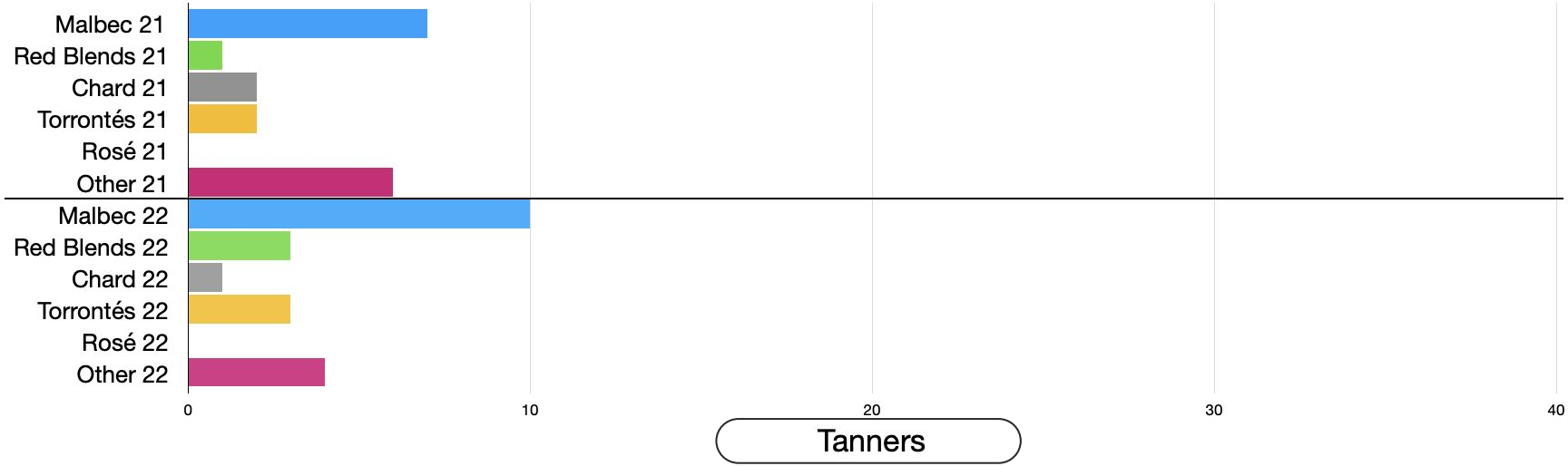
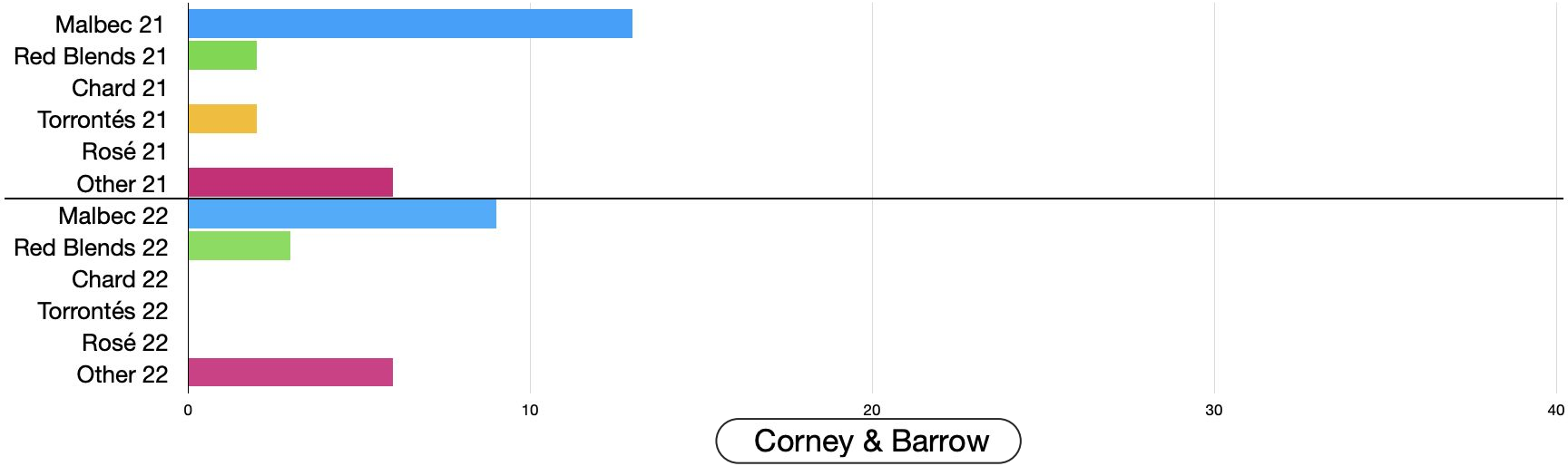


Table 1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Majestic	35	4	5	1	1	4	50	37	3	6	1	1	4	52
• Virgin wines	5	3	1	0	0	5	15	10	3	1	0	0	1	15
• Laithwaites	10	6	1	1	1	3	22	20	9	1	1	1	4	36
• Wine society	6	6	0	1	0	1	14	8	4	1	1	0	3	17
• House of Townend	8	3	0	2	0	11	24	8	3	0	1	0	12	24
• BBR	5	8	1	0	0	0	14	18	12	1	0	0	0	30
• Tanners	7	1	2	2	0	6	18	10	3	1	3	0	4	21
• Corney & Barrow	13	2	0	2	0	6	23	9	3	0	0	0	6	18



United Kingdom
Current Argentine Offering E-commerce Independents
2022 vs 2021

Table 1-1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Reserve wines	9	1	1	0	0	6	17	15	1	4	1	0	6	28
• Jeroboams	3	1	2	1	0	2	9	8	4	3	0	0	0	15
• Hedonism	15	7	5	0	0	6	33	31	15	7	0	1	9	63
• Sourcing Table	1	5	0	0	0	1	7	1	5	0	0	0	0	6
• Honest grapes	0	1	0	0	0	0	1	5	6	7	0	0	0	18
• Loki Wines	9	2	2	1	0	3	17	8	3	0	1	0	4	16
• Bin Two	2	0	0	0	0	0	2	2	0	0	0	0	0	2
• Oxford wine company	9	5	5	1	0	7	37	12	0	7	2	0	10	31
• Luvians Bottle shop	3	1	0	0	0	0	4	3	1	0	0	0	0	4
• Yapp Bros	2	0	0	0	0	1	3		4	0	0	0	0	4
• Slurp	9	2	1	0	0	1	13	6	2	0	1	0	1	10

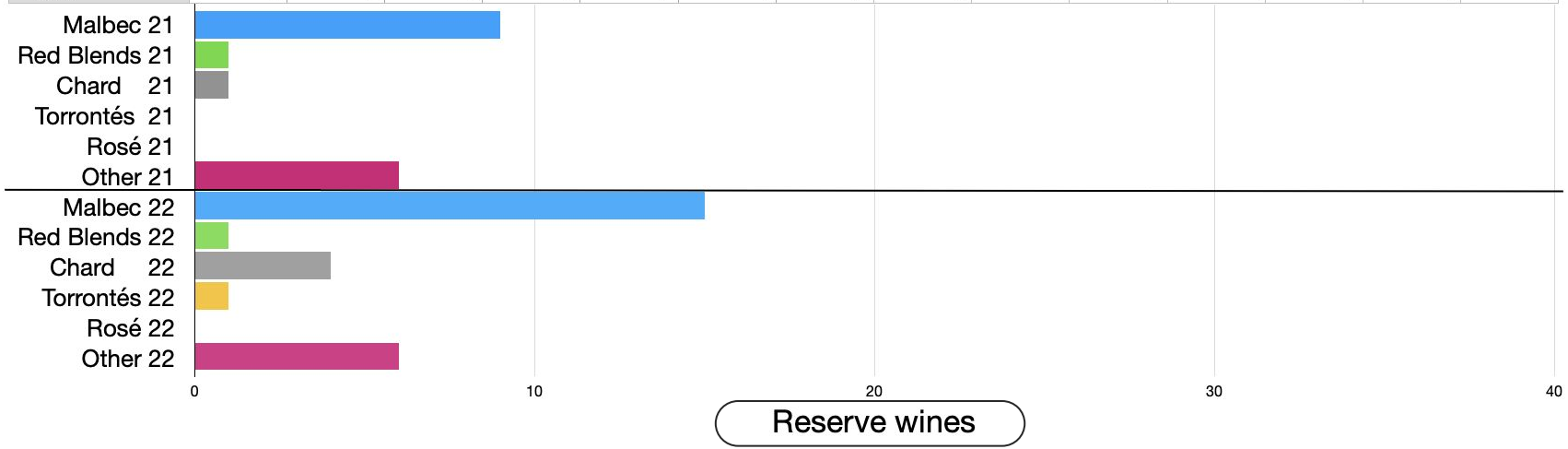


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Table 1-1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Reserve wines	9	1	1	0	0	6	17	15	1	4	1	0	6	28
• Jeroboams	3	1	2	1	0	2	9	8	4	3	0	0	0	15
• Hedonism	15	7	5	0	0	6	33	31	15	7	0	1	9	63
• Sourcing Table	1	5	0	0	0	1	7	1	5	0	0	0	0	6
• Honest grapes	0	1	0	0	0	0	1	5	6	7	0	0	0	18
• Loki Wines	9	2	2	1	0	3	17	8	3	0	1	0	4	16
• Bin Two	2	0	0	0	0	0	2	2	0	0	0	0	0	2
• Oxford wine company	9	5	5	1	0	7	37	12	0	7	2	0	10	31
• Luvians Bottle shop	3	1	0	0	0	0	4	3	1	0	0	0	0	4
• Yapp Bros	2	0	0	0	0	1	3		4	0	0	0	0	4
• Slurp	9	2	1	0	0	1	13	6	2	0	1	0	1	10

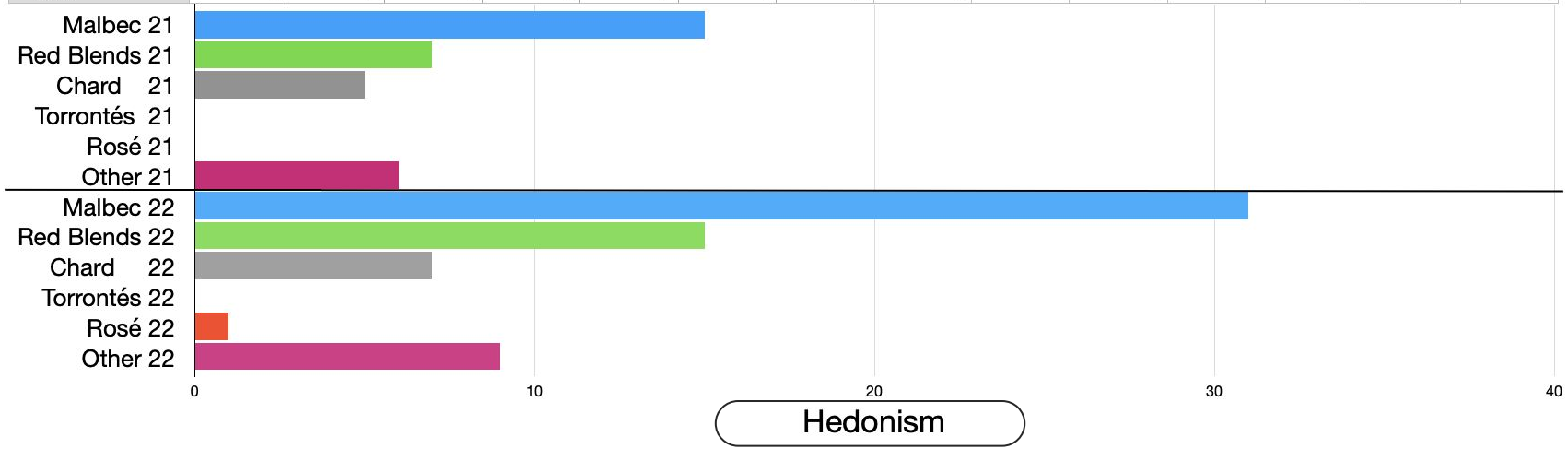

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Table 1-1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Reserve wines	9	1	1	0	0	6	17	15	1	4	1	0	6	28
• Jeroboams	3	1	2	1	0	2	9	8	4	3	0	0	0	15
• Hedonism	15	7	5	0	0	6	33	31	15	7	0	1	9	63
• Sourcing Table	1	5	0	0	0	1	7	1	5	0	0	0	0	6
• Honest grapes	0	1	0	0	0	0	1	5	6	7	0	0	0	18
• Loki Wines	9	2	2	1	0	3	17	8	3	0	1	0	4	16
• Bin Two	2	0	0	0	0	0	2	2	0	0	0	0	0	2
• Oxford wine company	9	5	5	1	0	7	37	12	0	7	2	0	10	31
• Luvians Bottle shop	3	1	0	0	0	0	4	3	1	0	0	0	0	4
• Yapp Bros	2	0	0	0	0	1	3		4	0	0	0	0	4
• Slurp	9	2	1	0	0	1	13	6	2	0	1	0	1	10

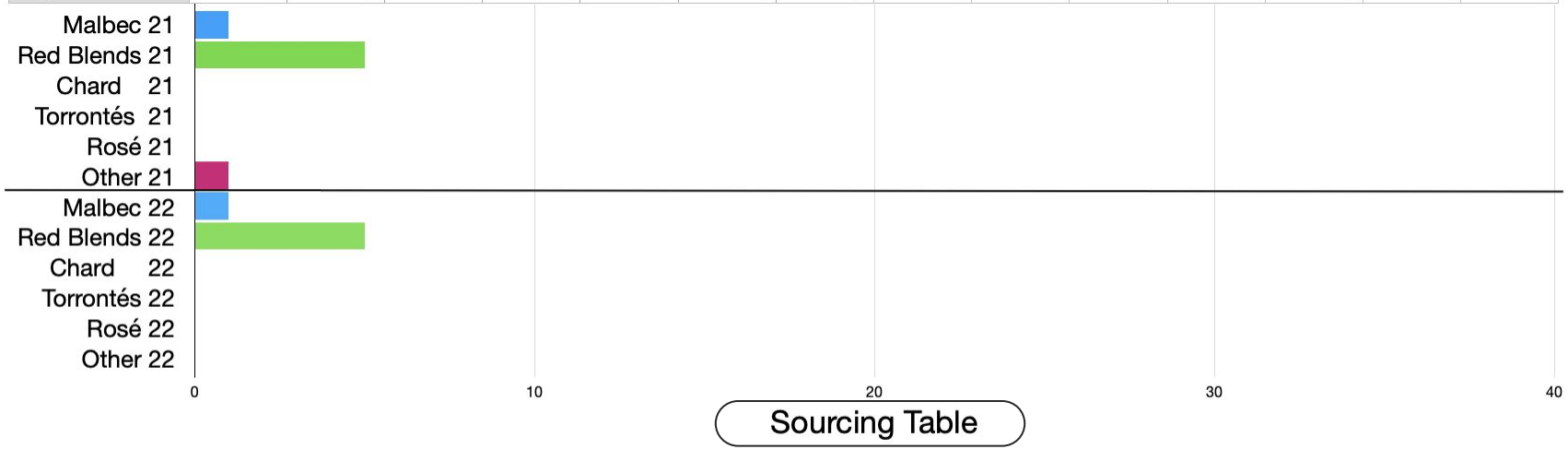

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Table 1-1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Reserve wines	9	1	1	0	0	6	17	15	1	4	1	0	6	28
• Jeroboams	3	1	2	1	0	2	9	8	4	3	0	0	0	15
• Hedonism	15	7	5	0	0	6	33	31	15	7	0	1	9	63
• Sourcing Table	1	5	0	0	0	1	7	1	5	0	0	0	0	6
• Honest grapes	0	1	0	0	0	0	1	5	6	7	0	0	0	18
• Loki Wines	9	2	2	1	0	3	17	8	3	0	1	0	4	16
• Bin Two	2	0	0	0	0	0	2	2	0	0	0	0	0	2
• Oxford wine company	9	5	5	1	0	7	37	12	0	7	2	0	10	31
• Luvians Bottle shop	3	1	0	0	0	0	4	3	1	0	0	0	0	4
• Yapp Bros	2	0	0	0	0	1	3		4	0	0	0	0	4
• Slurp	9	2	1	0	0	1	13	6	2	0	1	0	1	10

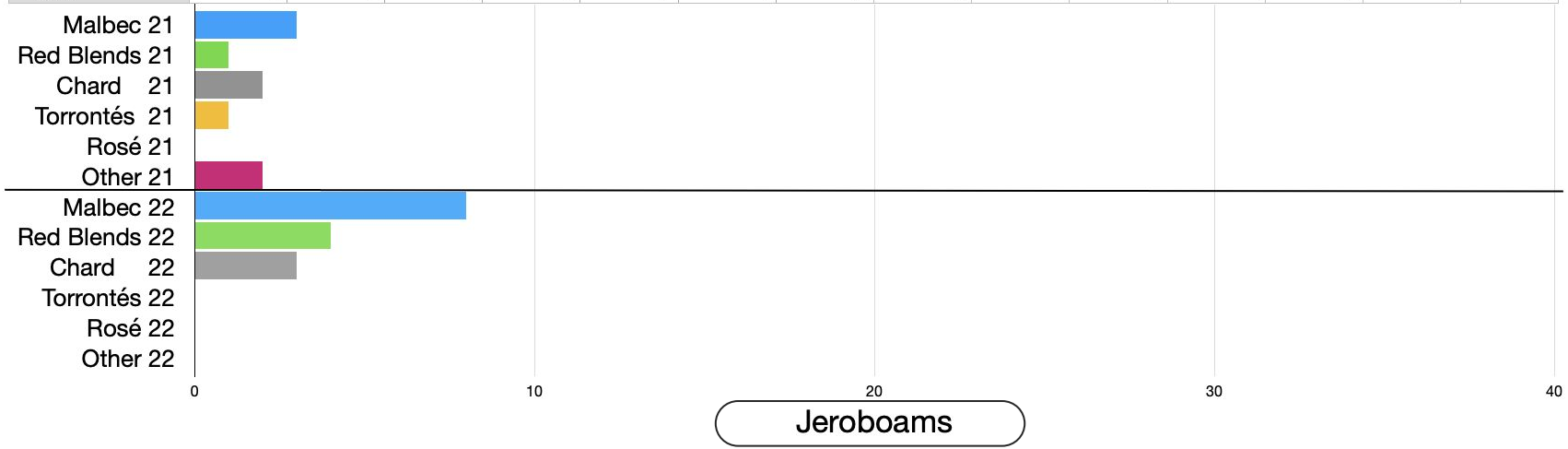
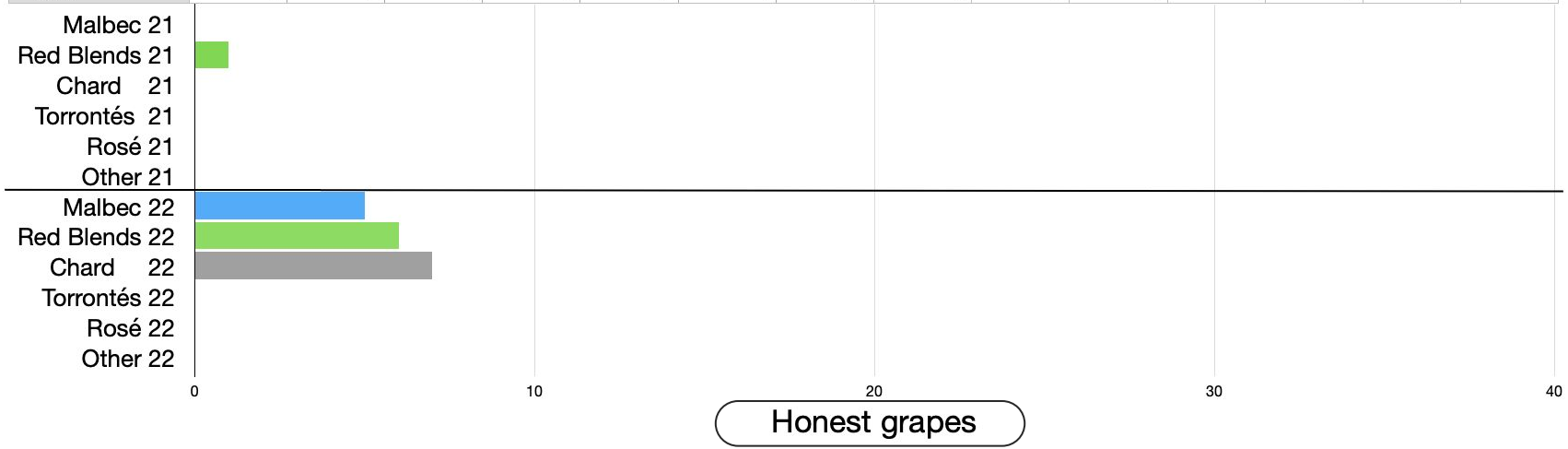


Table 1-1-1

	Malbec 21	Red Blends 21	Chard 21	Torrontés 21	Rosé 21	Other 21	Total 21	Malbec 22	Red Blends 22	Chard 22	Torrontés 22	Rosé 22	Other 22	Total 22
• Reserve wines	9	1	1	0	0	6	17	15	1	4	1	0	6	28
• Jeroboams	3	1	2	1	0	2	9	8	4	3	0	0	0	15
• Hedonism	15	7	5	0	0	6	33	31	15	7	0	1	9	63
• Sourcing Table	1	5	0	0	0	1	7	1	5	0	0	0	0	6
• Honest grapes	0	1	0	0	0	0	1	5	6	7	0	0	0	18
• Loki Wines	9	2	2	1	0	3	17	8	3	0	1	0	4	16
• Bin Two	2	0	0	0	0	0	2	2	0	0	0	0	0	2
• Oxford wine company	9	5	5	1	0	7	37	12	0	7	2	0	10	31
• Luvians Bottle shop	3	1	0	0	0	0	4	3	1	0	0	0	0	4
• Yapp Bros	2	0	0	0	0	1	3		4	0	0	0	0	4
• Slurp	9	2	1	0	0	1	13	6	2	0	1	0	1	10



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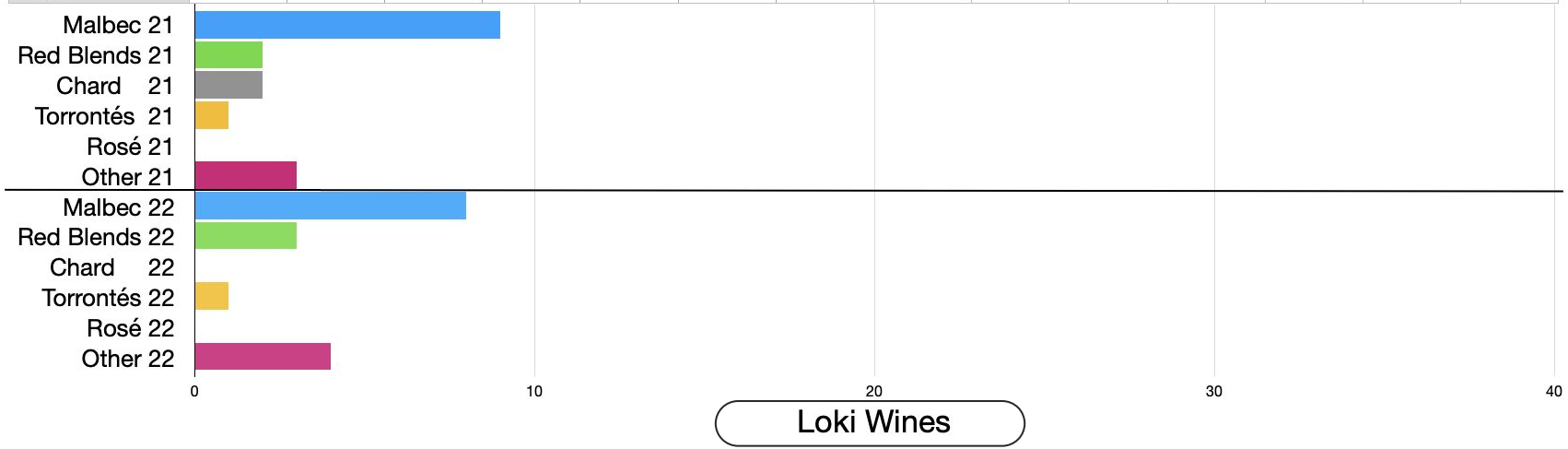

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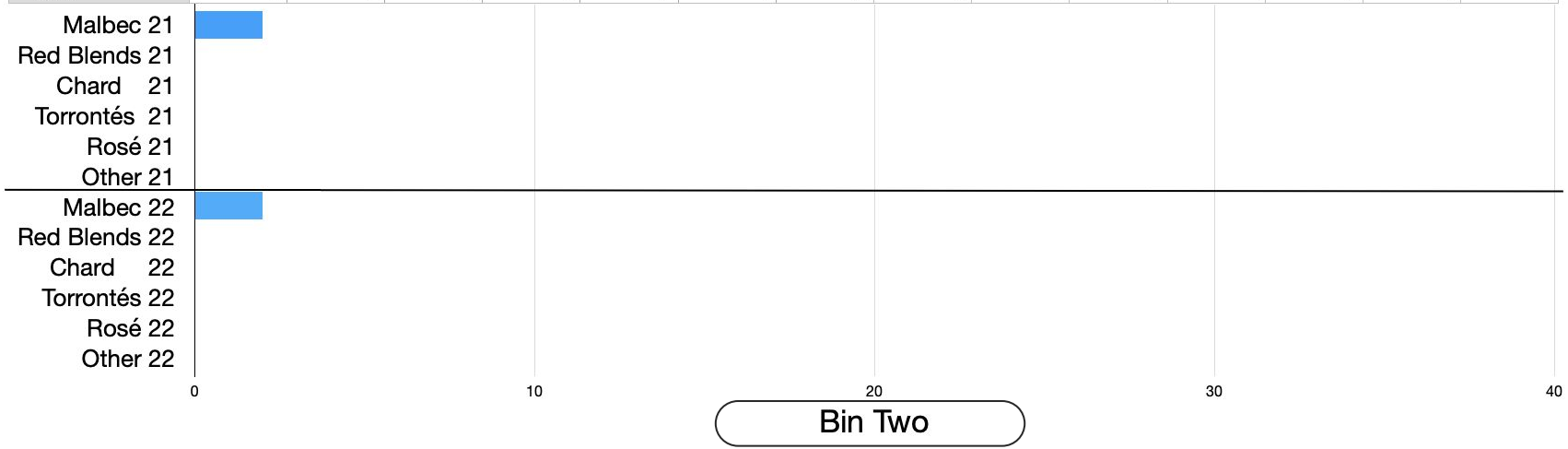

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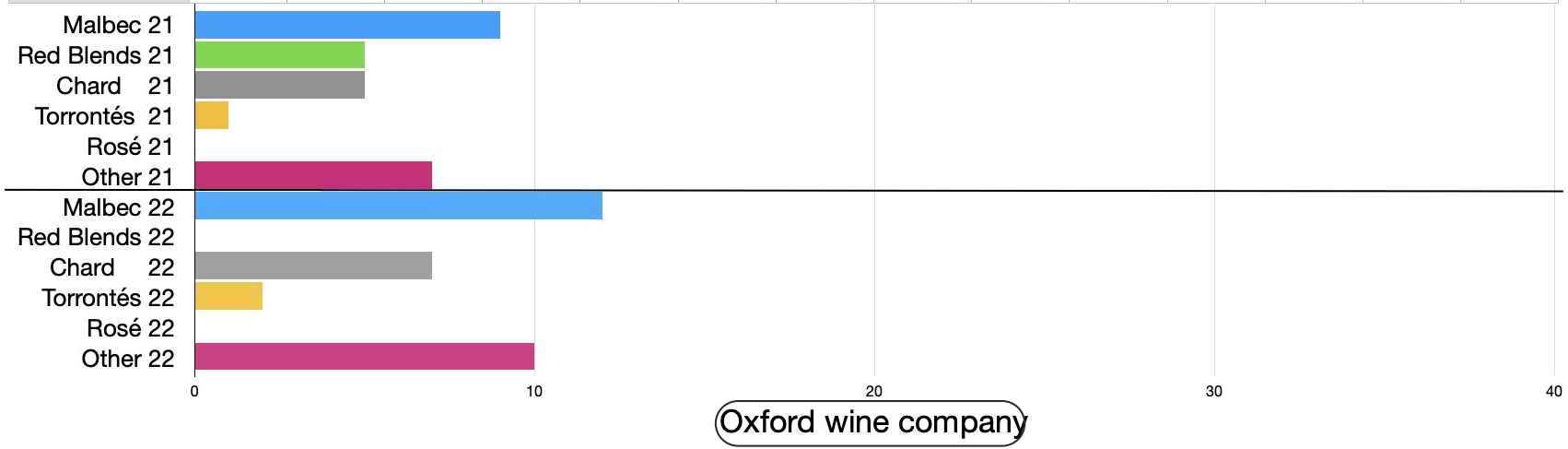

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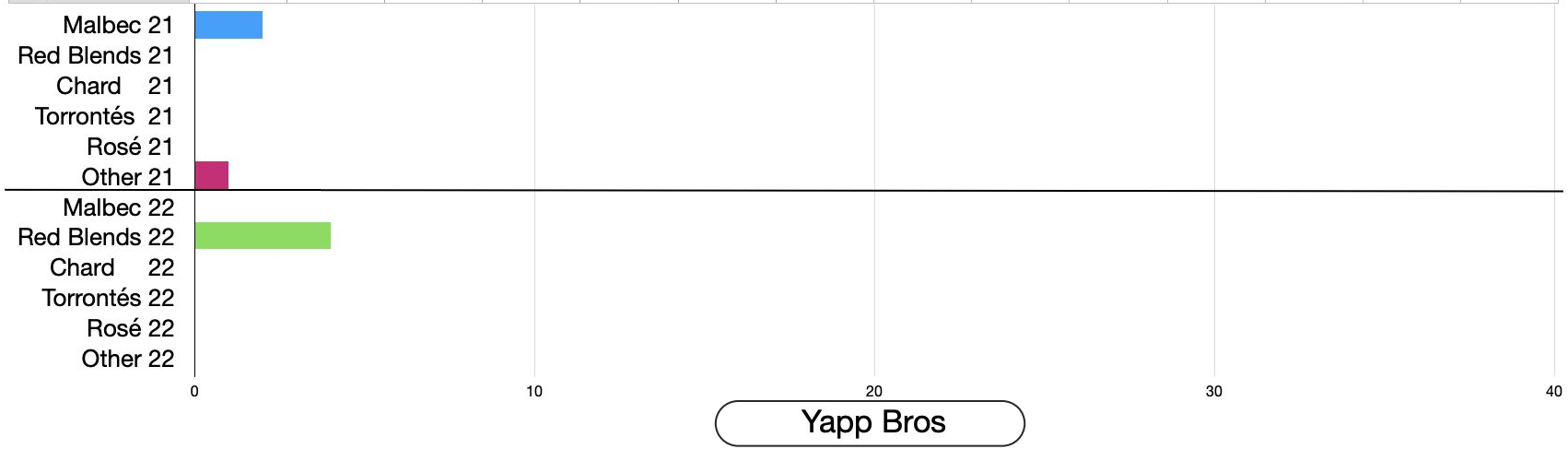

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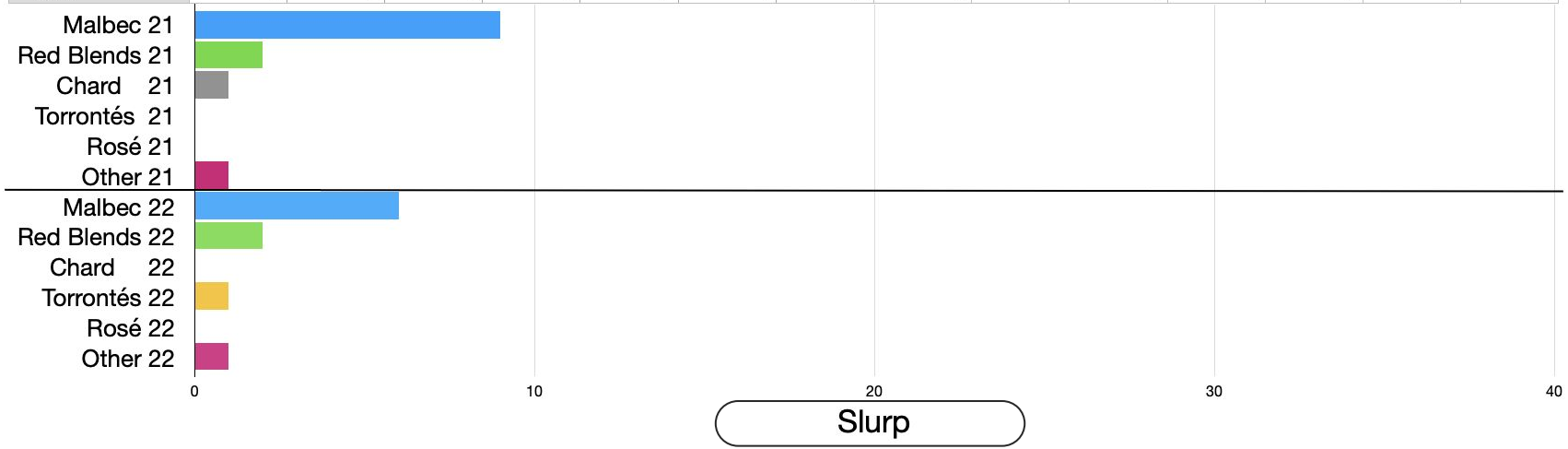

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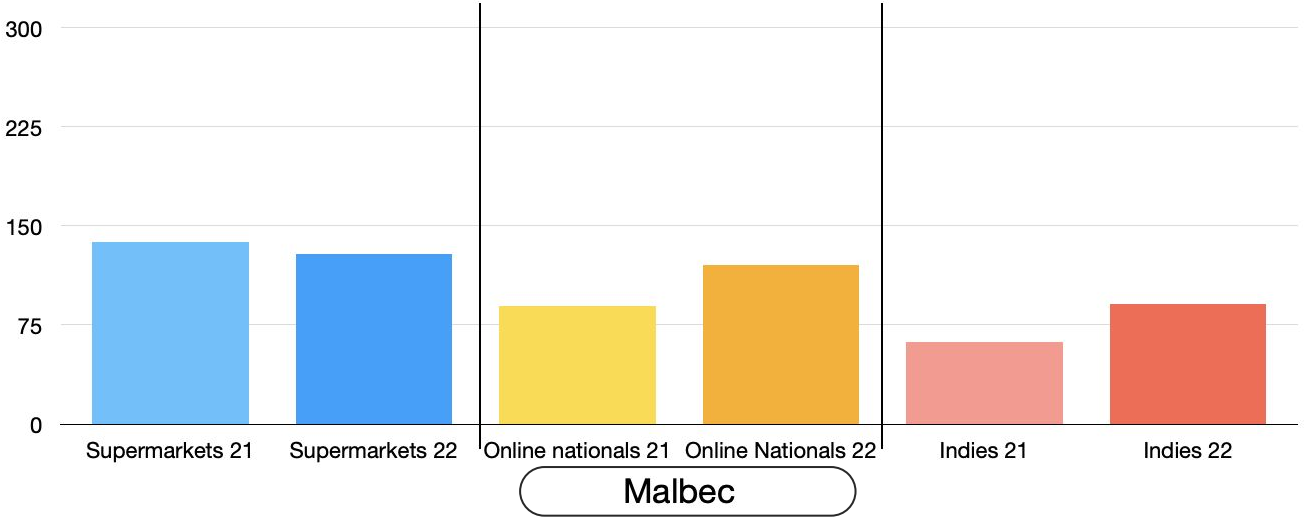
United Kingdom
Current Argentine Offering E-commerce
Overall By Style
2022 vs 2021

Table 1

	Malbec	Red Blends	Chard	Torrontés	Rosé	Others	Total listings
Supermarkets 21	138	10	23	10	8	46	235
Supermarkets 22	129	9	16	7	10	30	201
Online nationals 21	89	33	10	9	2	36	179
Online Nationals 22	120	40	11	7	2	34	214
Indies 21	62	25	16	3	0	27	133
Indies 22	91	41	28	5	1	30	196



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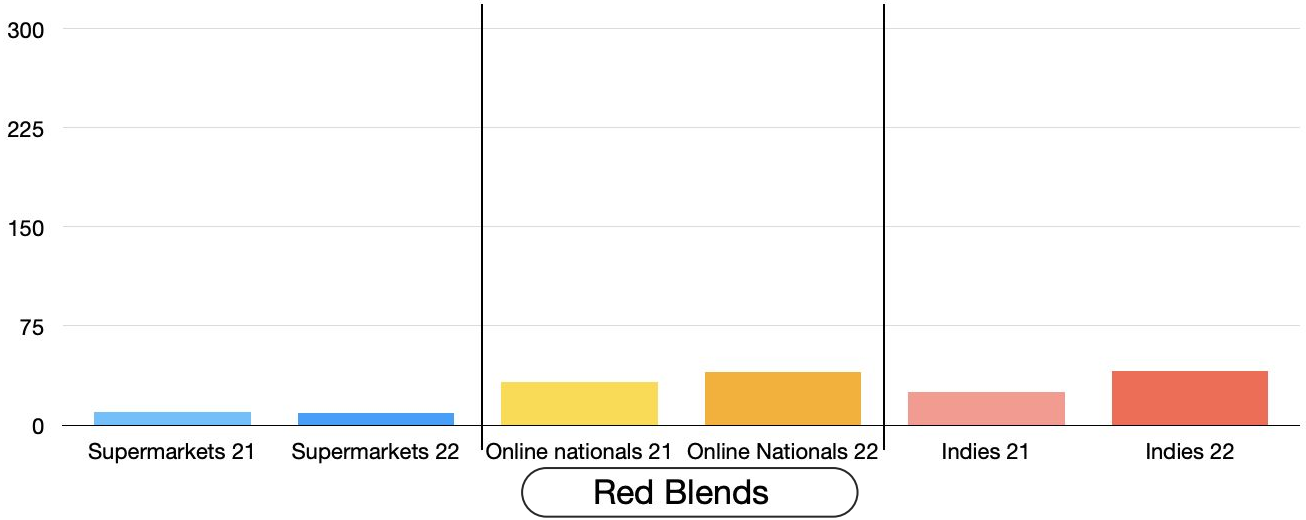

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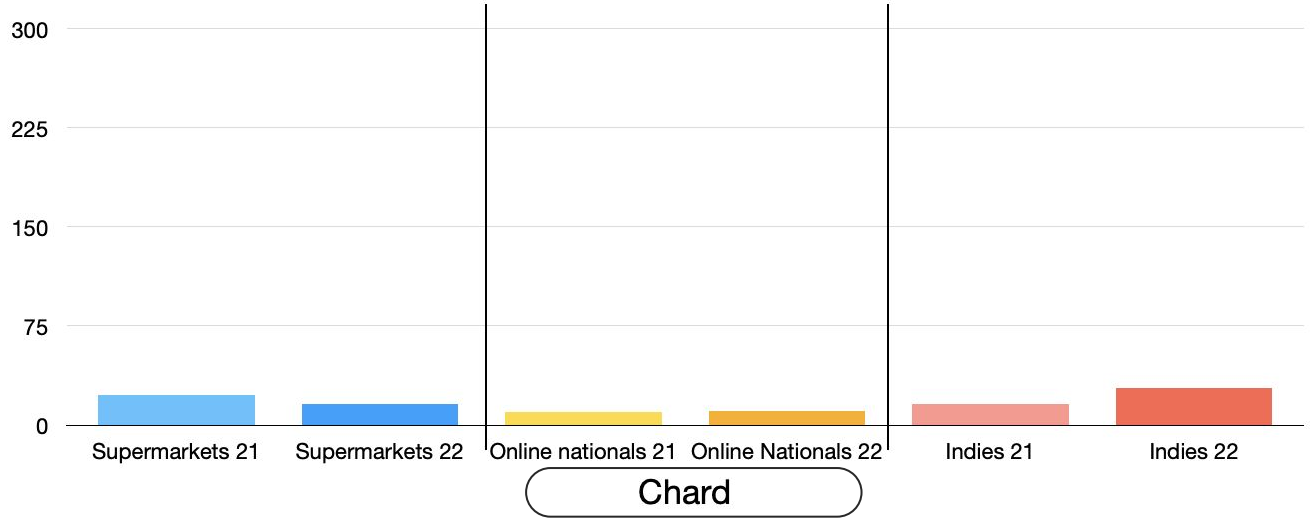

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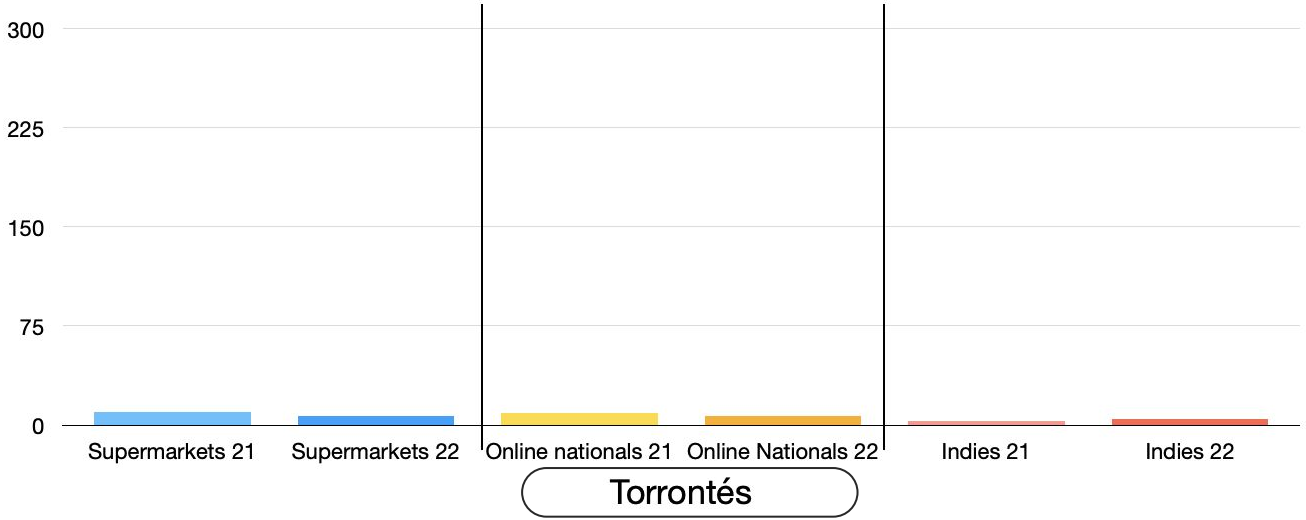

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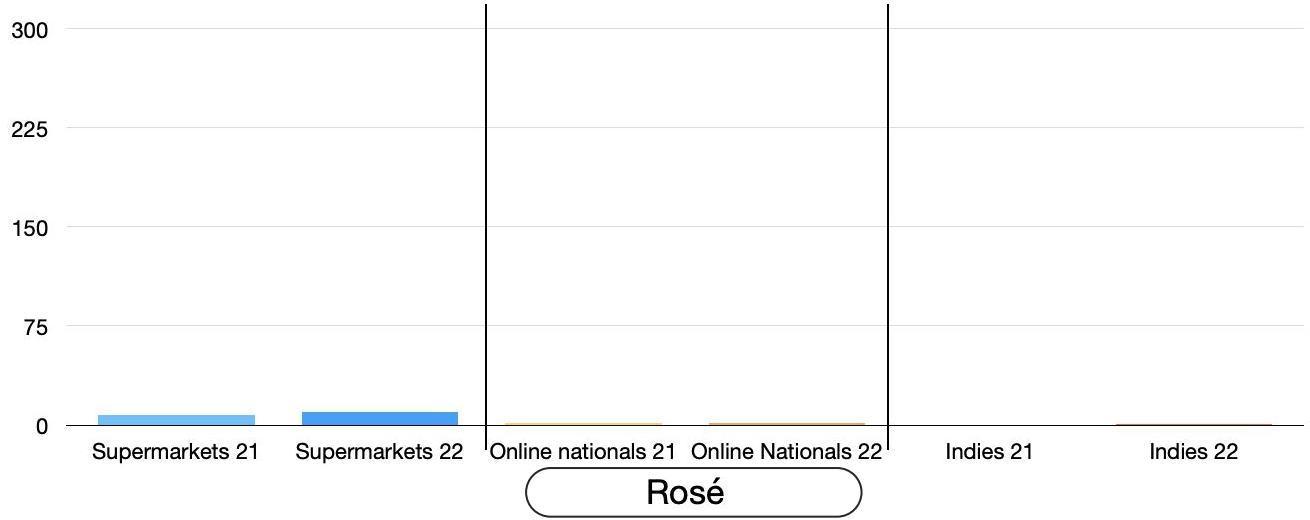

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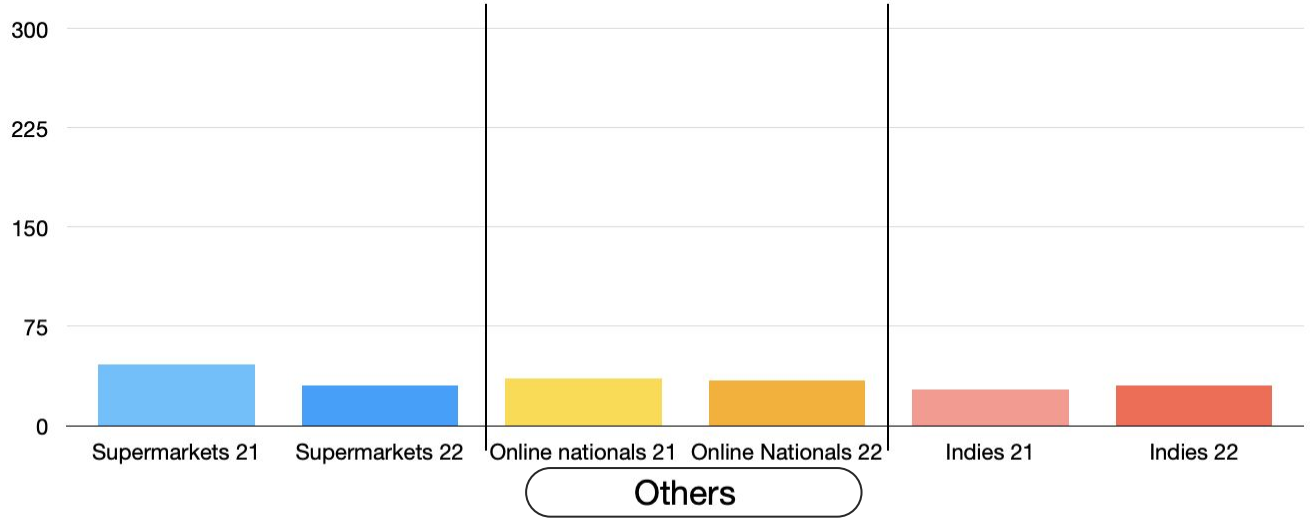

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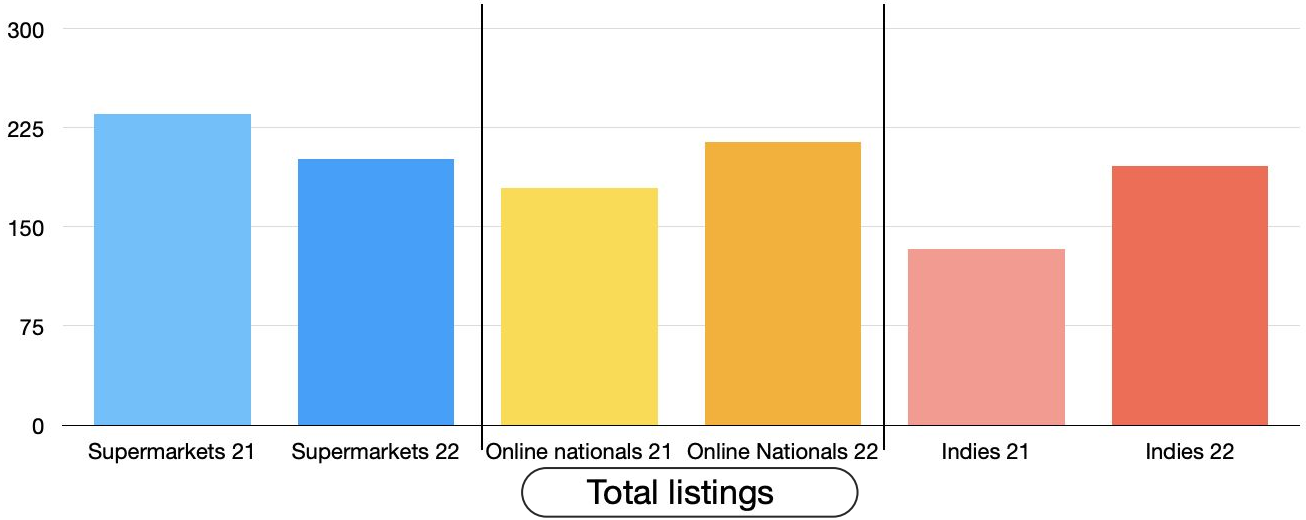


United Kingdom
Current Situation Covid

- Concern over large rise in Delta variant again
- Government unlikely to take any precautions
- Having an adverse effect on staffing levels
- UK Hospitality & Airlines particularly affected
- Chaos at Airports
- 1.2 million job vacancies in UK
- Many European staff have left and not come back

United Kingdom
Current Situation Sale Winners

- Sustainability more important for UK consumers
- 2021 increase in organic wine sales 5% and 9% 2022
- By end of 2022 87.5 m cases
- Regenerative viticulture - Dr. Jamie Goode
- Alcohol consumption declining amongst younger generation - 33% UK pop don't drink at all
- 45 % consumers now regularly by groceries online
- Rise of home delivery for restaurant food e.g. Just Eat & Deliveroo + drinks
- Highest increase in online sales came from women
- Prosecco, NZ Sauvignon, Rosé & Argentine Malbec lead the way
- Rapidly ageing population and increase in alc consumption
- E.g. 45 - 54 +16%, 55 - 64 +20%, Over 65 +36%

United Kingdom
Current Situation Trends

- Lighter Styles
- Rosé now all year round sales & darker styles
- Low & No Alcohol market booming e.g. now 3.1% beer market
- English sparkling performing very well - planting of vineyards on the rise
- Wine losing its share to Spirits and Non-Alc drinks
- Unusual and native grape varieties popular e.g. M&S ‘Found’ range
- Traditional regions outpricing themselves from main markets
- Consumers more willing to go outside of their comfort zone
- Celebrity wines are booming - e.g. Kylie Minogue, Snoop Dog, Graham Norton, Philip Schofield

United Kingdom
Current Situation Packaging

- Huge interest in alternative packaging
- Wine on tap in On - Trade increasing as quality gets better
- Cans grew 106% to 2020 and continues to grow - now specialists
- Bag in Box now 2 - 5 % market
- Paper bottles technology now in UK - Laithwaites & Ocado just introduced online
- Refillable ‘bottle for life’ ideas for premium drinks brands e.g. Johnny Walker

United Kingdom
Current Situation Regions & Styles

- Premium Chile / South Africa
- Poor harvests in Burgundy & France are forcing consumers too look elsewhere
- Germany, Hungary, Armenia, Georgia, Sicily, Greece
- Canary Islands very on - trend
- Italy rising for Fine Wine investment - also Vermentino & Barbera
- South Africa for white wines - Chenin Blanc & Sauvignon
- Big Brands still hold their own
- Orange / Qveri / Skin contact popular - associated with natural wines
- Pet Nat also very popular
- Renewed interest in old vines e.g. old vine conference

United Kingdom
Current Situation Brexit

- Increased paperwork causing delays in shipments to and from Europe
- Many exporters are now refusing to supply UK
- Some UK importers moving to Europe e.g. Netherlands
- Increased costs of shipping - also lead times much longer
- 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 lowering SKU and ranges
- Lack of lorry drivers making situation critical
- VI - 1 Forms not currently needed - situation unclear
- Paperwork not yet fully electronic - extra staff
- This will be difficult for small producers from Europe
- Britain's unilateral break down of NI Protocol could lead to trade war
- From October you may need to put importer details on back label

United Kingdom

Current Situation Proposed Duty Changes

- Biggest changes in Alcohol duty for 140 years
- Current rate £2.23 for 4% - 15% ABV per 750ml Bottle still wine
- £2.86 8.5% - 15% per bottle 750ml Sparkling wine
- Proposed rate per % of Alcohol
- Sparkling wine will be taxed at the same rate as still wine - boost for UK Sparkling wine industry
- Beer at 8-19p per unit
- Wine at 26p per unit
- Spirits at 29p per unit
- This will place further paperwork burden on an already over burdened trade
- Will punish New World producers with higher Alc %

United Kingdom
Current Situation On Trade

- On Trade is bouncing back but with problems - 32% less than 2019
- 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 workers left the UK in 2020/21 - Covid/Brexit
- Many restaurants & pubs closed permanently in 2020
- 7000 pubs lost since 2012
- Increasing use of restaurant delivery services helping some
- Likely to see boom in independent sector

United Kingdom
Current Situation Threats

- Government instability
- Brexit - Paperwork / Logistics from Europe
- Brexit - Economy downturn now looking likely
- Inflation now at near 10%
- Fuel & Food poverty rising
- On - Trade lack of staff - exodus back to Europe
- South Africa + Chile - Premium offering & affection from UK press
- Rest of world - Malbec at entry level
- Malbec - commoditisation - fatigue & reputation
- Lack of Vision & Knowledge from buyers
- Poor trade deals
- Smaller wine lists - but more esoteric
- Shrinking On - Trade
- New Alcohol Duty rates
- Free Trade deal Australia

United Kingdom
Current Situation Opportunities

- Possible trade war with E.U.
- Brexit - Logistics from Europe
- New Independent off - trade
- Low rents in empty high streets
- Young Entrepreneurs - specialists
- Rosé - specially Malbec
- Criollas & Torrontés
- Cabernet Franc
- Premium Malbec
- Malbec Blends

- Orange / skin contact whites / Pet Nat
- White wines
- Italian/Spanish/Rhone varieties
- Regionality
- Availability from Argentina
- Winemaker - led projects - niche markets
- Old Vines
- Women in Wine
- Innovation in Online Distribution

United Kingdom
Sustainability Protocols

- Sustainability becoming more important to the Consumer
- Importers and Distributors keen to be seen to be part of sustainability chain
- Harpers Wine gaining signatories to try to reach an established industry standard through a charter
- Charter Pathways to enable measurement of agreed goals

United Kingdom
Sustainability Protocols - E.U. 5 Project

- E.U. Commission Industry 5 project announced
- In wake of Covid, this has accelerated the need for change in Protocols and practices
- Founded around 3 principals
- Human - Centric approach
- Sustainability - re-use, re-purpose & re-cycle whilst minimising use of energy
- Resilience - support for infrastructure in times of crisis

WINES OF ARGENTINA

United Kingdom

Sustainability Protocols Charter - Harpers

Harpers Sustainability Charter Pathways
Signatories to the Charter will be invited to chart their sustainable progress across the following, as applicable:
Carbon footprint reduction
Use of renewable energy
Waste management & recycling
Water management
Ecological care & regeneration
New Product & Development & packaging
Staff welfare & progression
Diversity & inclusivity
Responsible drinking & public health
Community focused activities
Encouraging sustainability among supply chain partners
Industry advocacy on environmental and social matters
Responsible portfolio sourcing
The Harpers Sustainability Charter is open to UK drinks businesses of every shape and size that are genuinely embracing and moving along pathways to greater sustainability.

x

UK
MARKET

LIBERTY
WINES

WINES OF ARGENTINA

100%

of our head office and warehouse electricity comes from **renewable sources**

CARBON NEUTRAL PLUS

In 2021 we became **carbon neutral plus**, offsetting more emissions than we generate

ZERO TO LANDFILL

100% of office and warehouse waste is **recycled** or used to generate electricity

REDUCING EMISSIONS

is our priority. Our latest carbon footprint appraisal found we achieved this **for the third year running**

DOOR TO DOOR

carbon neutral transportation for every bottle of wine that we import and distribute

8 YEARS

since we became the 1st leading UK premium wine distributor to achieve **Carbon Neutral** certification

OUR 1ST ELECTRIC VAN

is now in use. All other vans meet **Euro 6 emissions** standards

ENVIRONMENTAL ACTION TEAM

People from across the company **work together** to further our sustainability goals

A BUZZING OFFICE

Beehives on our roof benefit the local ecosystem

WE SUPPORT SEAWILDING

Community-led Marine Habitat Restoration

who work to **restore marine habitats** in Scotland

SUSTAINABLE RESTAURANT ASSOCIATION

We have been a member **since 2015**

BERKMANN WINE CELLARS

AUSTRALIA

TOTAL	PRODUCER	THE VINEYARD	WINERY & CELLARS	PACKAGING & LOGISTICS	SOCIAL RESPONSIBILITY
17	UNICO ZELO/HARVEST ★	05	06	03	03
12	KATNOOK ESTATE ★	04	03	03	02
12	BRASH HIGGINS ★	06	03	02	01
07	LANGMEIL	02	04	-	01
06	DOMAINE TOURNON	03	02	-	01
06	LETHBRIDGE	03	03	-	-
04	WOODLANDS	04	-	-	-

SUSTAINABILITY CHAMPIONS UNICO ZELO & HARVEST

Sustainability is woven into the DNA of this winery; it's one of their founding principles. For the Unico Zelo range they work with grape varieties that require a minimum of additional resources both in the vineyard and the winery. The grapes are dry-farmed, meaning that irrigation is not required, and they also have a natural resistance to pests, disease and viruses, eliminating the need for chemical sprays in the vineyard.

The Harvest brand focuses on supporting independent growers in the North Adelaide Hills, whose livelihood previously depended on the purchase of their grapes by large wine companies. As the only outlet for these grapes, the wineries were able to dictate pricing, often on terms that did not allow the growers to turn a profit. In response to this Harvest operates as a growers' co-operative, giving the farmers a share of the profits from the sale of the wine, thereby allowing them to make a fair living and ensuring the ongoing viability of their farms. The company's employees are also not overlooked, with regular engagement surveys carried out, whilst they are also encouraged to take part in local volunteer schemes. Beyond this, they are committed to reducing energy and water use in the winery, using modern, eco-friendly lighting and heating systems and they will soon move over to solar power. Packaging is designed to use the minimum of raw materials and to be recyclable, whilst logistics, both incoming and outgoing, are carefully monitored for efficiency. Organic and inorganic waste is recycled or repurposed, and the money raised from returnable packaging is donated to local charities. They have even gone so far as to replace pens with pencils made from recycled newspaper and have also installed Tesla charging points at the cellar door to encourage their visitors to reduce their carbon footprint.

This all-encompassing approach to sustainability makes them worthy of being recognized as a sustainability champion; this is further demonstrated by their recent certification as a B-Corporation - an endorsement that recognises their use of business activities as a force for positive change.

COMMITTED TO REDUCING **ENERGY & WATER USE** IN THE WINERY

UNICO ZELO HARVEST.

X

The three pillars of Vivid

We divide our efforts between the three main areas of our business; our product, our office, and our operations.

Our Product

We work with producers who share our beliefs and adhere to sustainable methods in the vineyard and winery. Practices include organic and biodynamic viticulture, ISO 14001 certification, carbon emission reduction, water management, waste reduction and recycling, and ethical working conditions.

Our Office

We have switched to LED motion-activated lights, only use our heating and cooling systems when necessary, and recylce over 90% of our waste. Between October 2018 and October 2019, we saved 201 trees with our recycling efforts, and our contact centre in Bristol is entirely paperless. We reuse packaging, wherever possible, when shipping from our office.

Our Operations

We work closely with our shipping partners to cut emissions. We also work with our customers and logistics partners to reduce miles travelled by our delivery vans, ensuring that vehicles are as low emission as possible.

WHY SHOULD YOU BE LISTING *these wines*

Because consumers want to drink them!

Sales of organic wines have exploded in the last few years and look set to continue doing so. But it's more than just the 'organic' label. Consumers are increasingly interested in provenance and a good story, which these producers have buckets of!

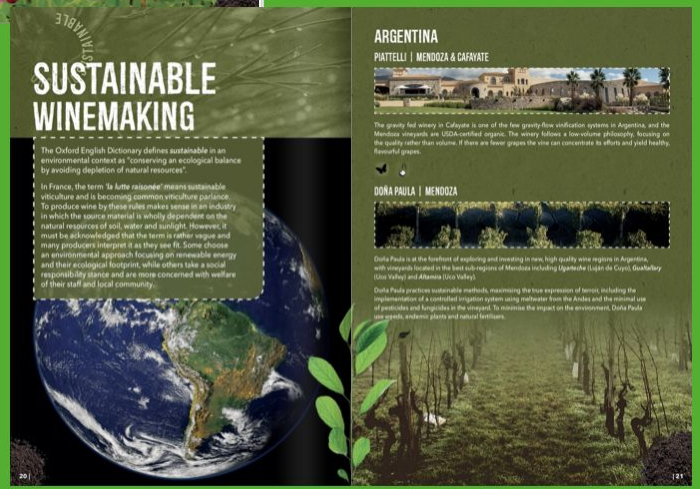
Consumers are willing to *pay over a third more* for organic wine

Organic wine consumption in the UK surged *70%* between 2012 and 2017

Market share is forecast to almost double from *5%* in 2019 to *9%* in 2022

UK
MARKET

HALLGARTEN
WINES



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United Kingdom
Routes to Company Sustainability certification UK

- B Corp
- Future Fit Business
- Planet Mark
- ISO 5001 (Energy), 9001 & 14001
- Future +
- Various Trade Body & Publications e.g. Harpers
- Expect more scrutiny from your trade partners

Intercambio
de Ideas

Disparador: guiar al #vinoargentino por el camino de la innovación y la sustentabilidad en un mundo de condiciones en constante cambio.

Desafío: Ante la pérdida de market share del #vinoargentino ¿cómo ayudamos a las bodegas grandes y pymes a posicionarse en los mercados foco a fin de aumentar el market share de Argentina?
En 2021, la agenda climática y la sustentabilidad se convirtieron en mainstream. En 2022, Europa ya lanzó sus iniciativas de Industrias 5.0. Los horizontes de largo plazo se acortaron a 3 años.

miro

https://miro.com/app/board/uXjVOoCA9pU=/?share_link_id=926338730989

Conclusiones

Pilares Institucionales

Nuestra Visión de la Industria

MUCHAS
GRACIAS
WINES OF ARGENTINA