WINE TRENDS SOUTH OF THE 49TH PARALLEL, AND A PEAK NORTH

ONTARIO WINE INSIGHTS
MARCH 7, 2017 – NIAGARA ON THE LAKE

Danny Brager - SVP Beverage Alcohol Practice, U.S.
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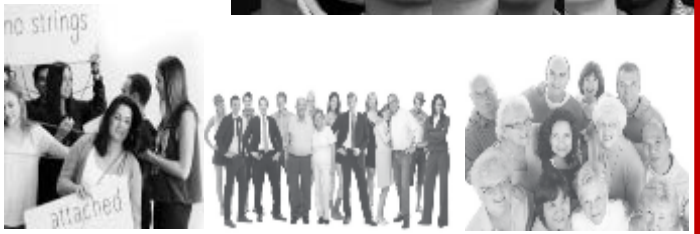
Consumer Fragmentation



Product Fragmentation Retailer

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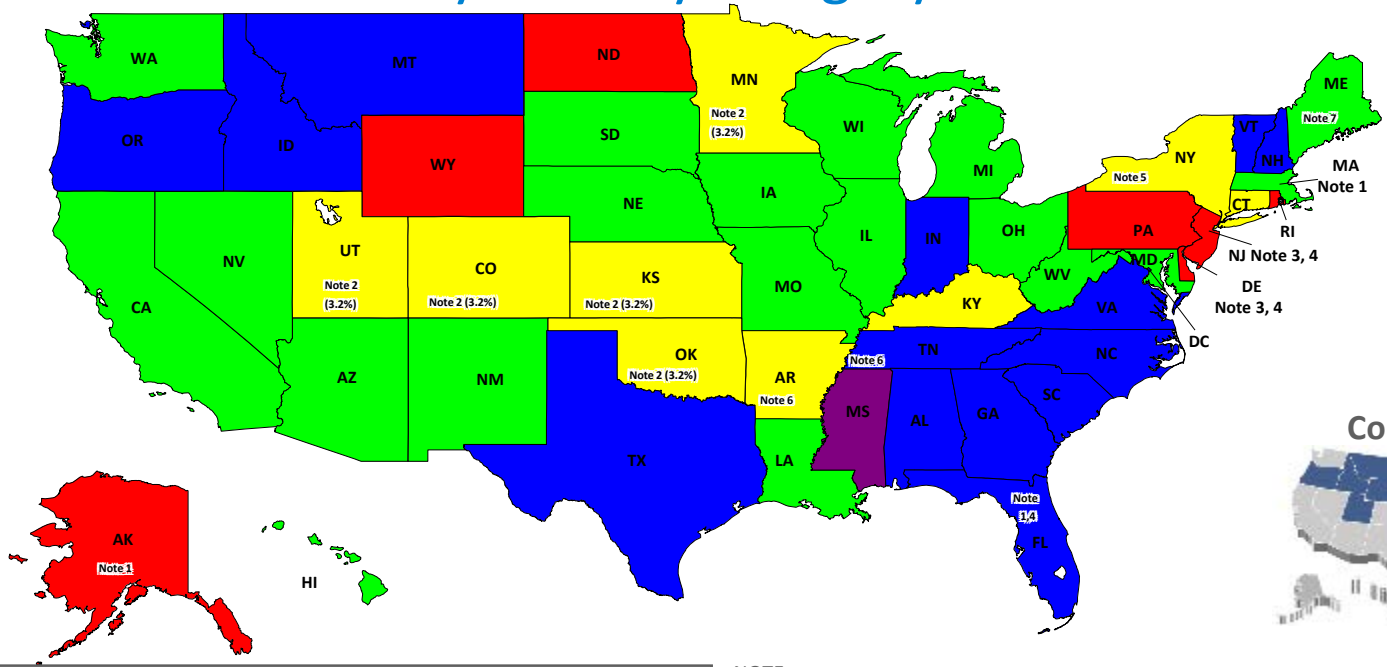
WHEN IT COMES TO ALCOHOL, IT'S ANYTHING BUT THE UNITED STATES… different rules by state by category



Control States

- Wine, Liquor and Beer available in grocery stores.
- Wine and Beer available in grocery stores. No Liquor can be sold in grocery stores.
- Beer available in grocery stores. No Wine or Liquor can be sold in grocery stores.
- No Alcoholic Beverages can be sold in grocery stores.
- Wine and Beer less than or equal to 5% ABW available in grocery stores. No Liquor or Products greater than 5% ABW can be sold in grocery stores.

NOTE:

1. Separate entrance for alcoholic beverage sales required. (For liquor in FL, wine & beer in AK).
2. Beer sales limited to 3.2%.
3. Selected accounts sell wine & beer, varies by local ordinance.
4. Selected accounts sell liquor, varies by local ordinance.
5. Wine coolers & beer are permitted in grocery stores.
6. Beer sales limited to 5.0%.

Tennessee

Times Free Press Local Business Sports

Wine sales start today in Tennessee grocery stores

July 1st, 2016 | by Tim Omarzu | in Local Regional News | Read Time: 2 mins.

Oklahoma

Oklahoma Voters Approve State Question 792, To Change Liquor Laws

Posted: Nov 08, 2016 2:54 PM PST Updated: Nov 08, 2016 7:07 PM PST

BY ASSOCIATED PRESS

Kansas

Posted February 13, 2017 05:03 pm - Updated February 13, 2017 05:31 pm

By McKenna Harford

Special to the Capital-Journal

Kansas grocery stores lobby for right to sell wine, beer

Massachusetts

boston.com

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AP Associated Press

New law will allow more beer, wine sales in Mass.

November 23, 2011

Pennsylvania

News — Politics

It's the law: Wine to be sold in Pa. grocery stores

Updated: JUNE 9, 2016 — 1:08 AM EDT

Colorado

POLITICS > COLORADO POLITICS

Hickenlooper signs into law biggest change to alcohol sales in Colorado since Prohibition

By **JOEY BUNCH** | jbunch@denverpost.com and **ELLIS ARNOLD** | earnold@denverpost.com |
PUBLISHED: June 10, 2016 at 2:30 pm | UPDATED: June 13, 2016 at 2:32 pm

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Danny Jason

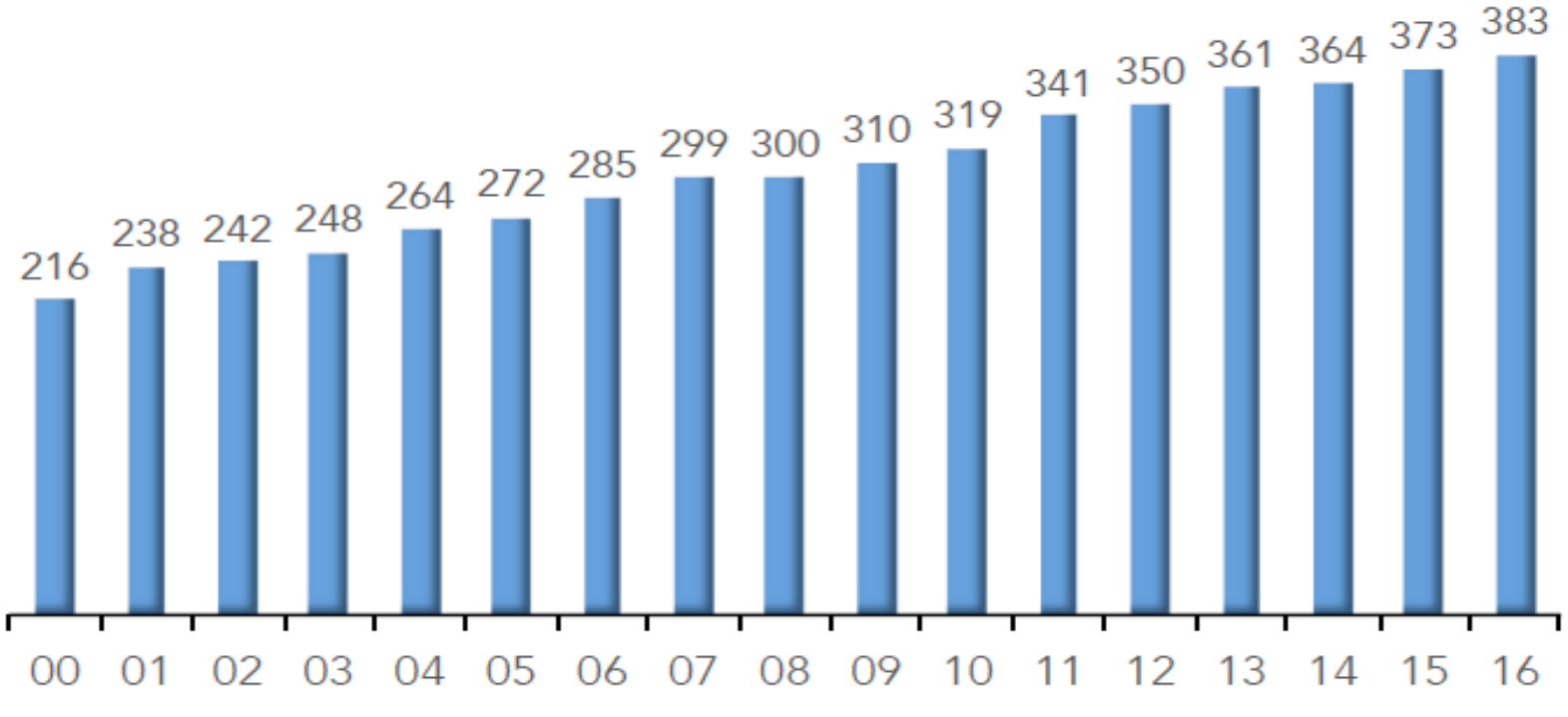
AGENDA

- What
- Who
- Where
- Why

Total Wine Shipments to Market

(Still and sparkling wines,
Millions of cases)

+2.8%



Source

bw 166

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U.S. WORLD'S LARGEST WINE CONSUMING MARKET BUT MORE POTENTIAL

#1
Volume & Value
Growing, Consistently

120MM Consumers
At least several x per year
85MM at least monthly
46MM at least weekly

#42
per capita**
74%<France
72%<Italy

nielsen

Average responses consumer surveys conducted in 2015

IWSR

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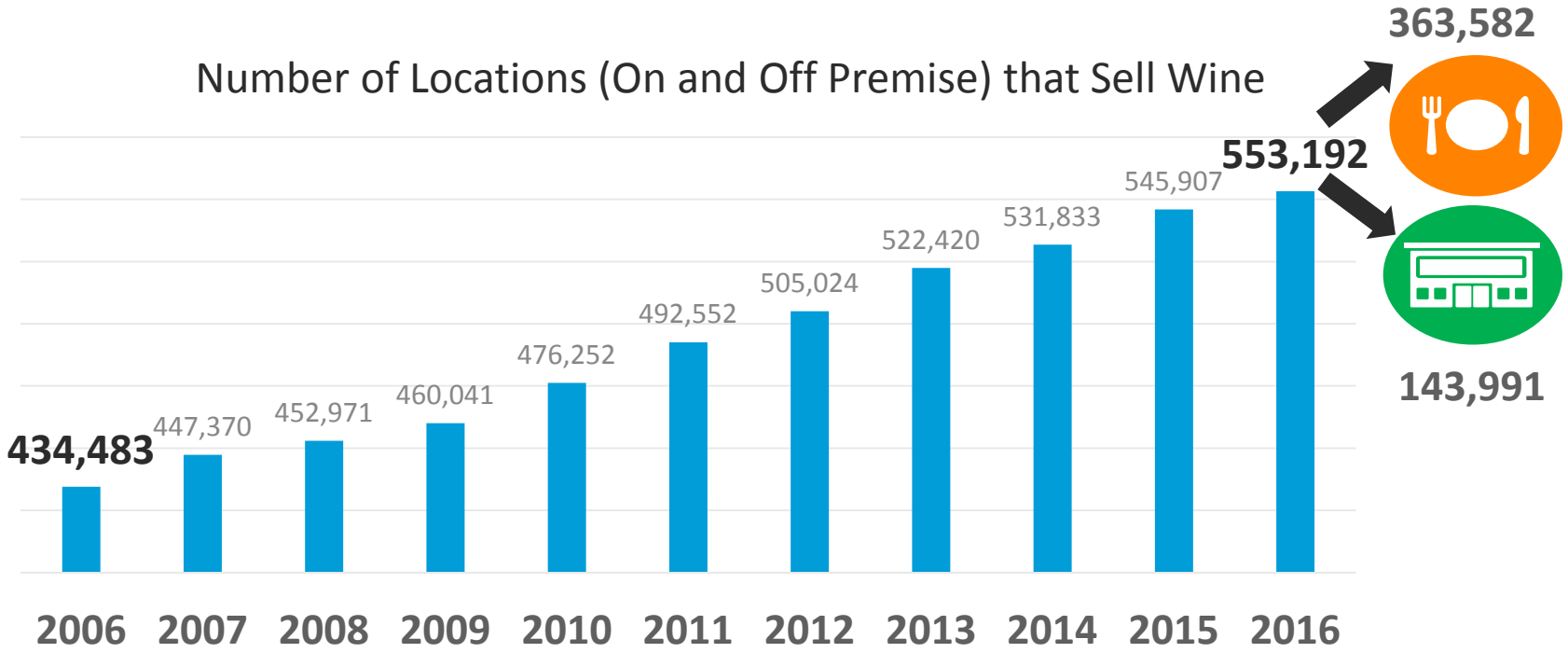
AMERICANS ACCESS TO WINE CONTINUES TO EXPAND

Over 550,000 locations that sell wine – ~ 120,000 more than 10 years ago



Nielsen TDLinx – December of each year

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FASTEST GROWING WINE SELLING CHANNELS

based on Store Count

Off Premise

- Limited Assortment (no frills)
- Natural/Gourmet
- E-commerce

MARIANO'S

Bristol Farms
An Extraordinary Food Store®

WHOLE FOODS

THE FRESH MARKET

GELSON'S
THE SUPER MARKET

ALDI

Save a lot
food stores

DOLLAR GENERAL

201central
wine, beer & specialty food

MARKET
BY PRICE CHOPPER

valuland
Quality Food, Low Prices!

LIDL

PRICE RITE

GIANT EAGLE
MARKET DISTRICT

SPROUTS
FARMERS MARKET

LUNDS&BYERLYS
KITCHEN
SHOP · EAT · DRINK · EXPLORE

nielsen

Nielsen TDLinx – December of each year

WE LIVE IN A BRICKS PLUS CLICKS WORLD

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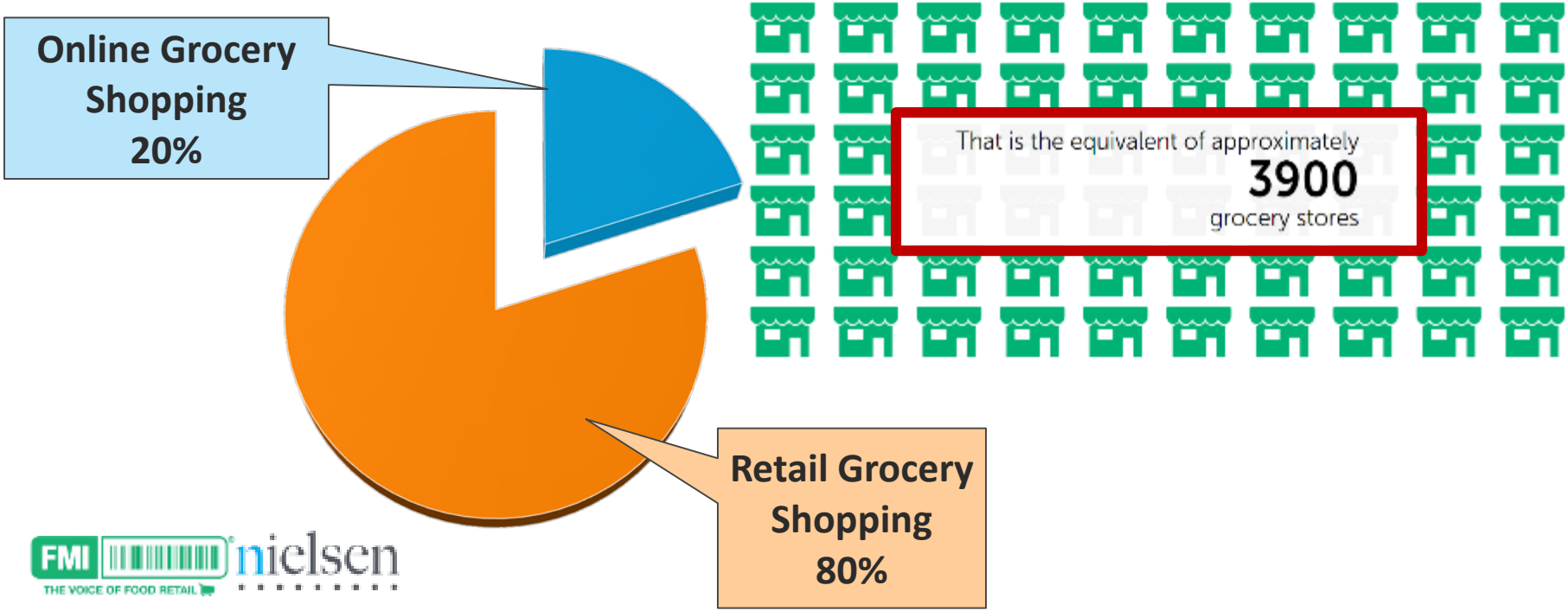
FUTURE OF ONLINE GROCERY SHOPPING

By 2025, the share of online grocery spending could reach **20%**, representing **$100 Billion** in annual consumer sales



Source: FMI and Nielsen – Digitally Engaged Food Shopper Study (2017)

FASTEST GROWING WINE SELLING CHANNELS

Based on Store Count

Fast Casual

smashburger
smash. sizzle. savor.

MOD

FUZZY'S TACO SHOP

ZOËS KITCHEN

CHIPOTLE MEXICAN GRILL

DICKEY'S BARBECUE PIT

marco's Pizza

BURGERFI

SHAKE SHACK

Theaters + more

BARNES & NOBLE

BED BATH & BEYOND

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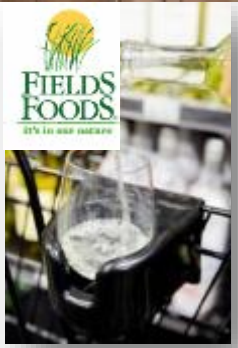
GROCERAUNTS PROVIDE WINE OPPORTUNITIES



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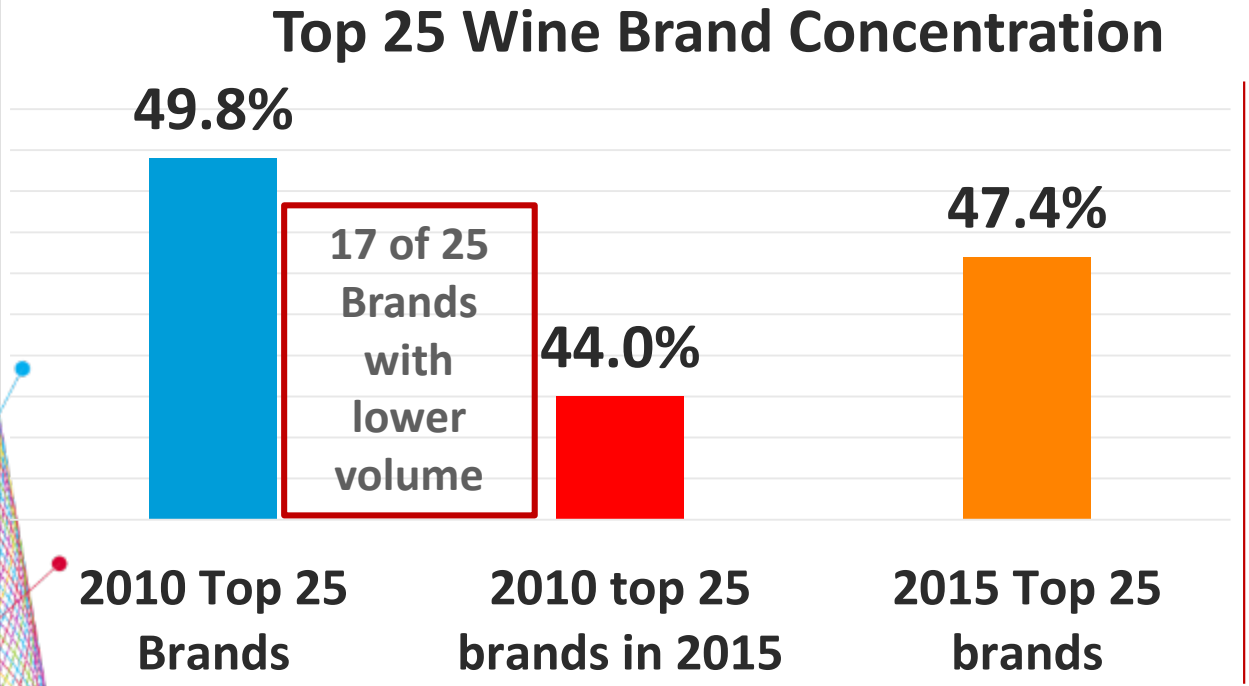
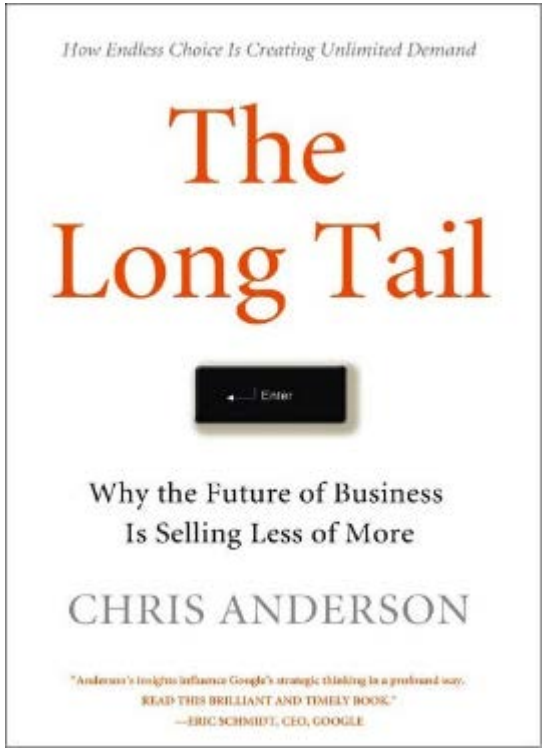
FRAGMENTATION - STILL CONCENTRATED BUT INCREASINGLY A LITTLE LESS





Source: Beverage Information Group (Wine Handbooks)

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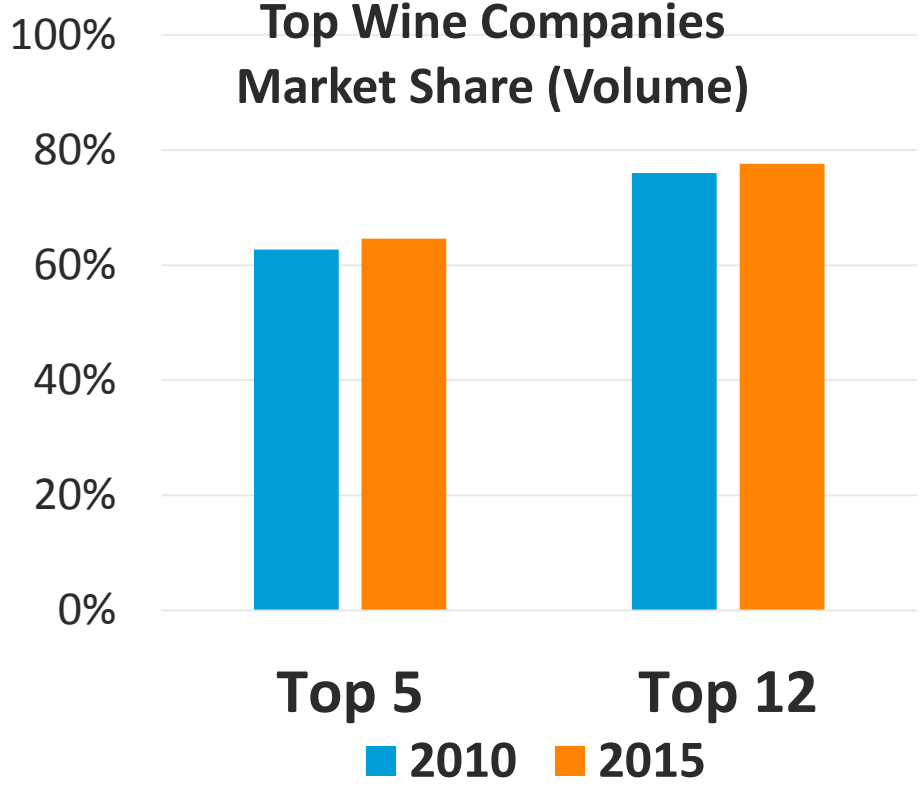
CONSOLIDATION PUSHING BACK AGAINST FRAGMENTATION



Source: Beverage Information Group (Wine Handbooks)

the harris poll

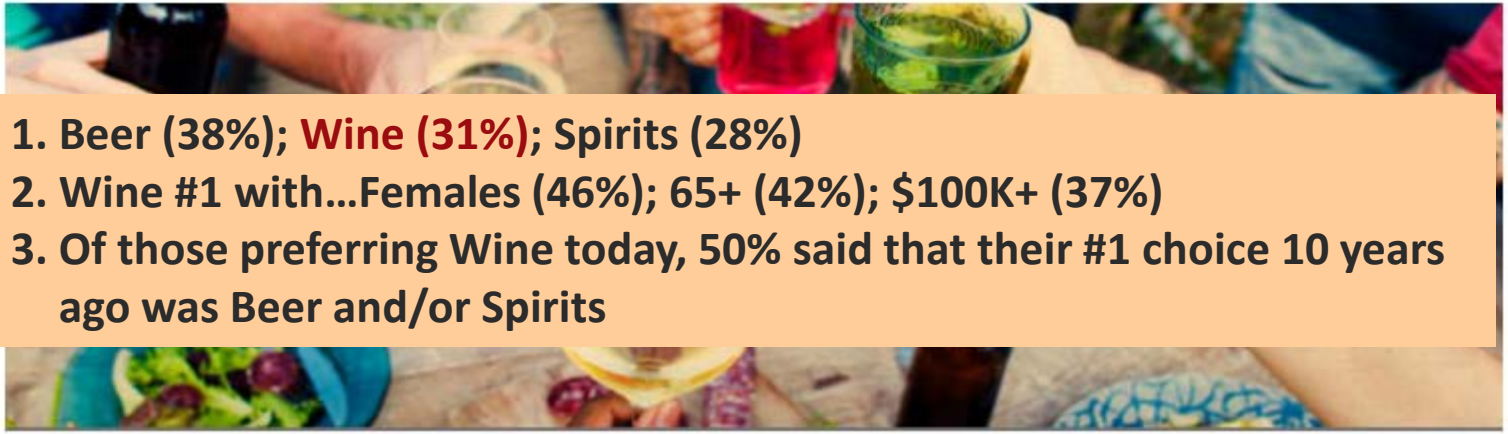
HARRIS POLLS CLIENT POLLS IN TH

Beer Tops List of Beverage of Choice, But Wine Sees Gains in Popularity

Wine is the favorite alcohol among women, adults ages 65+, and those in high income households

12:00 PM EST Feb 3, 2017 | Rating ☆☆☆☆☆ Tools Share

Q: On occasions when you drink alcohol, if you had to choose one, what is your current adult beverage of choice



1. Beer (38%); Wine (31%); Spirits (28%)
2. Wine #1 with…Females (46%); 65+ (42%); $100K+ (37%)
3. Of those preferring Wine today, 50% said that their #1 choice 10 years ago was Beer and/or Spirits

nielsen Source: Nielsen study conducted by the Harris Poll – January 18-20, 2017

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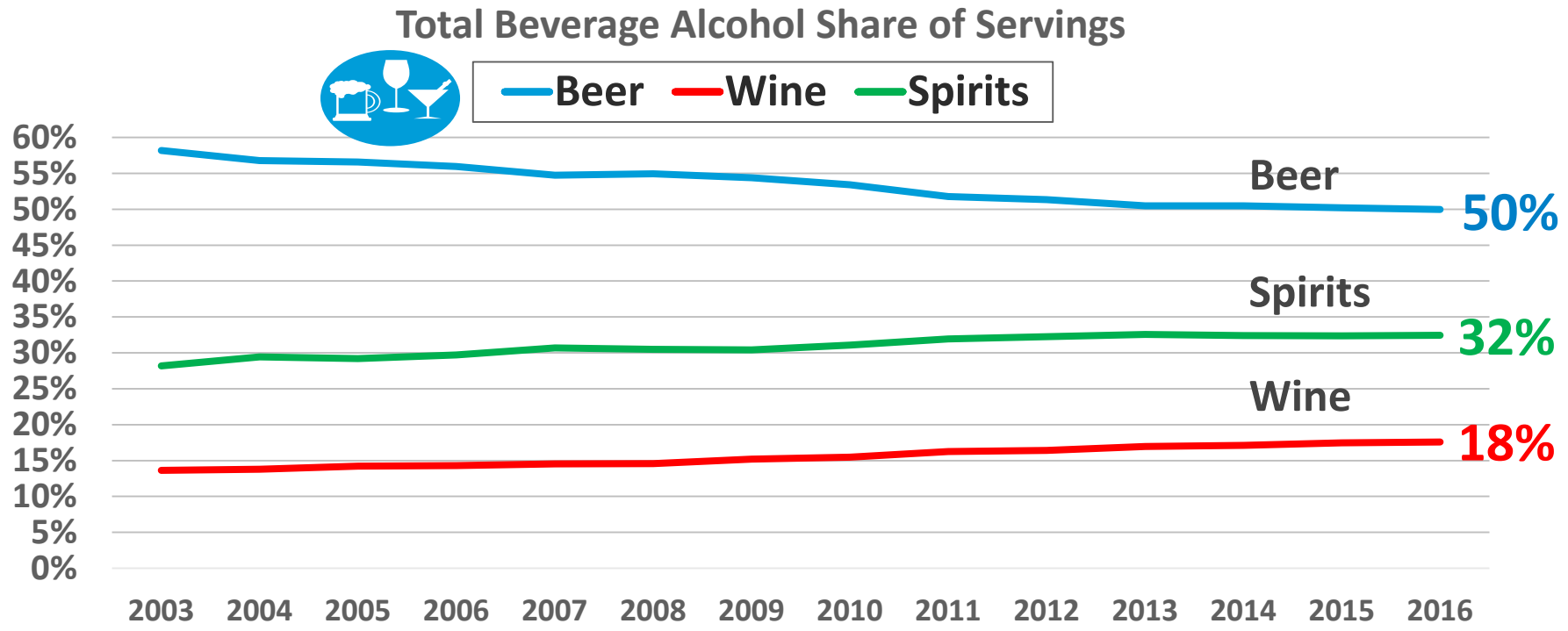
WINE AND SPIRITS CONTINUE TO WIN THE "BATTLE OF THE POUR" AT BEER'S EXPENSE

Source: bw 166

$234 BILLION



CHANNELS WE MEASURE

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OFF PREMISE

- Food / Drug
- Mass Merchandisers
- Dollar
- Convenience
- Military Exchanges
- Select Club Stores
- Liquor*

WINE

221 MM 9L cases

$33 billion dollars (@ retail)

nielsen | CGA

ON PREMISE

- Eating (Restaurants)
- Drinking (Bars)

E-commerce

(in development 2017)

*7 liquor market geographies (NY City, NJ, FL, MA, MD, CO, MN); PLUS 15 liquor chain retailers across the country

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Total Category Annual Percentage Growth - 2016 vs 2015

Off Premise

	Volume	$$
Beer	+0.2%	+2.2%
Wine	+1.8%	+4.4%
Spirits	+2.6%	+4.9%

nielsen Source: Nielsen Off Premise channels – thru 12-31-2016

On Premise

	Volume	$$
Beer	-2.0%	-0.7%
Wine	+0.1%	+0.9%
Spirits	+1.3%	+3.1%

nielsen | CGA Source: Nielsen CGA On Premise channels – 52 w/e 12-31-2016

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WINE –WHO, WHAT, WHERE

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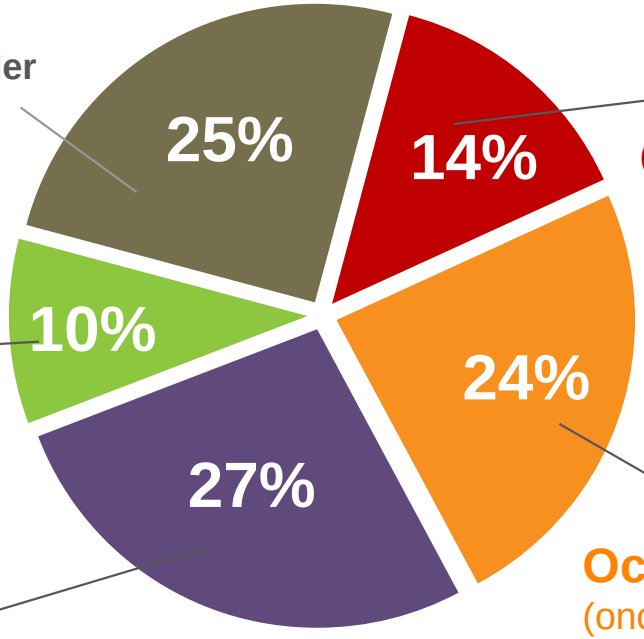
WINE CONSUMPTION AMONG U.S. ADULTS



Teetotaler

High Frequency Wine Drinker
(more often than once a week)

Infrequent Alcohol Consumer
(drink alcohol - including wine - less than every 2-3 months)

Occasional Wine Drinker
(once a week or less often, but more than once every 2 – 3 months)

Non-Wine Drinker
(drink beer and/or spirits only)

Base: 6,859 U.S. Adults 21+
Source: WMC – ORC Segmentation Survey June 2016

THE 'WHO' OF WINE IN THE U.S.

Index: Relative to Adult 21+ Pop'n Volume

21+	Race	%	Index
65.4%	White	70.5%	108
11.3%	Black	10.3%	90
15.3%	Hispanic	12.6%	82
5.7%	Asian	4.6%	82

21+	Age	%	Index
25.6%	21-34	20.8%	81
17.5%	35-44	16.3%	93
18.5%	45-54	18.7%	101
17.8%	55-64	20.8%	117
20.6%	65+	23.5%	114

21+	Gender	%	Index
48.1%	Male	42.7%	89
51.9%	Female	57.3%	111

21+	Income	%	Index
22.8%	<$30K	14.3%	63
17.8%	$30-$50K	13.8%	78
18.3%	$50-$75K	18.3%	100
13.3%	$75-$100K	15.4%	116
14.8%	$100-$150K	16.8%	113
13.1%	$150K+	21.3%	162

Source: Nielsen Spectra 2016 (Simmons) - Volume

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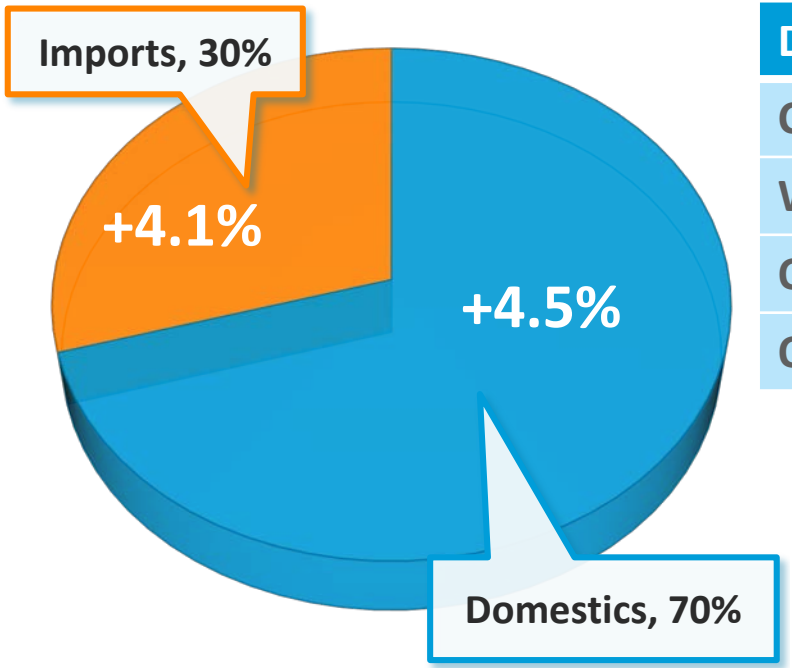
DOMESTICS RULE, BUT IMPORTS HEALTHY OVERALL (SOME MORE THAN OTHERS)

SHARE ($) – OFF PREMISE

Imports	= 100%
Italy	35.2%
Australia	15.8%
France	14.0%
Argentina	8.6%
New Zealand	8.4%
Spain	6.4%
Chile	5.8%
Other	5.8%



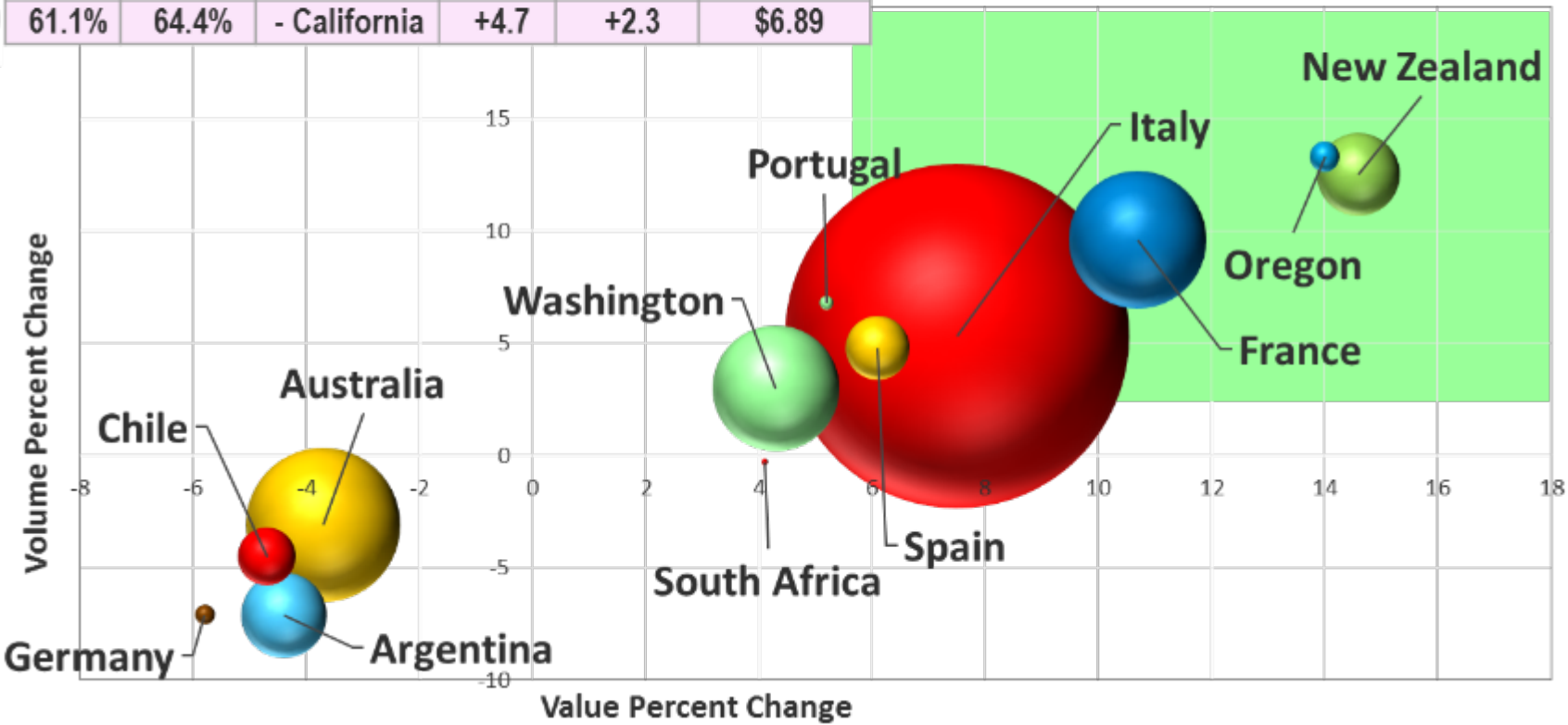
Domestics	= 100%
California	86.6%
Washington	5.4%
Oregon	1.3%
Other	6.7%

Source: Nielsen Total U.S. All Outlets (xAOC + Liquor Plus + Conv + Military); 52 w/e 12-31-2016 (Dollar growth rate)

TOTAL WINE - NZ, OR, FR, IT LEAD % GROWTH

Sales Share		Total Wine	Percent Change		Avg Price/ 750 ml
Value	Volume		Value	Volume	
61.1%	64.4%	- California	+4.7	+2.3	$6.89

nielsen Off Premise Channels



nielsen Source: Nielsen Total U.S. All Outlets (xAOC + Liquor Plus + Conv + Military); 52 w/e 12-31-2016 (Bubble = Annual $ Size); Total Wine

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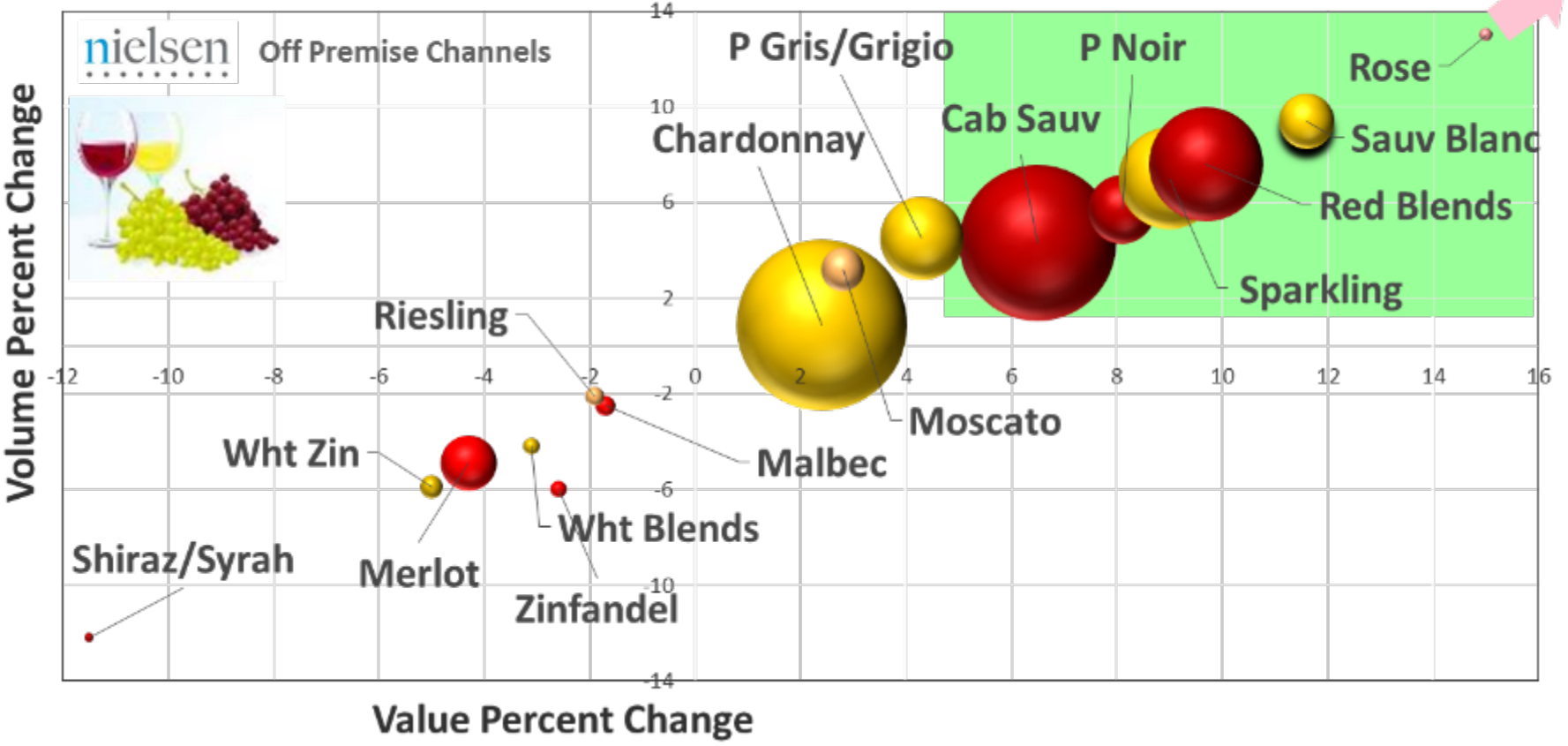
SOME WINE TYPES STORIES

ROSE', SB, RED BLENDS, PN, CAB, SPARKLING LEAD



nielsen Source: Nielsen Total U.S. All Outlets (xAOC + Liquor Plus + Conv + Military); 52 w/e 12-31-2016 (Bubble = Annual $ Size); Table Wine

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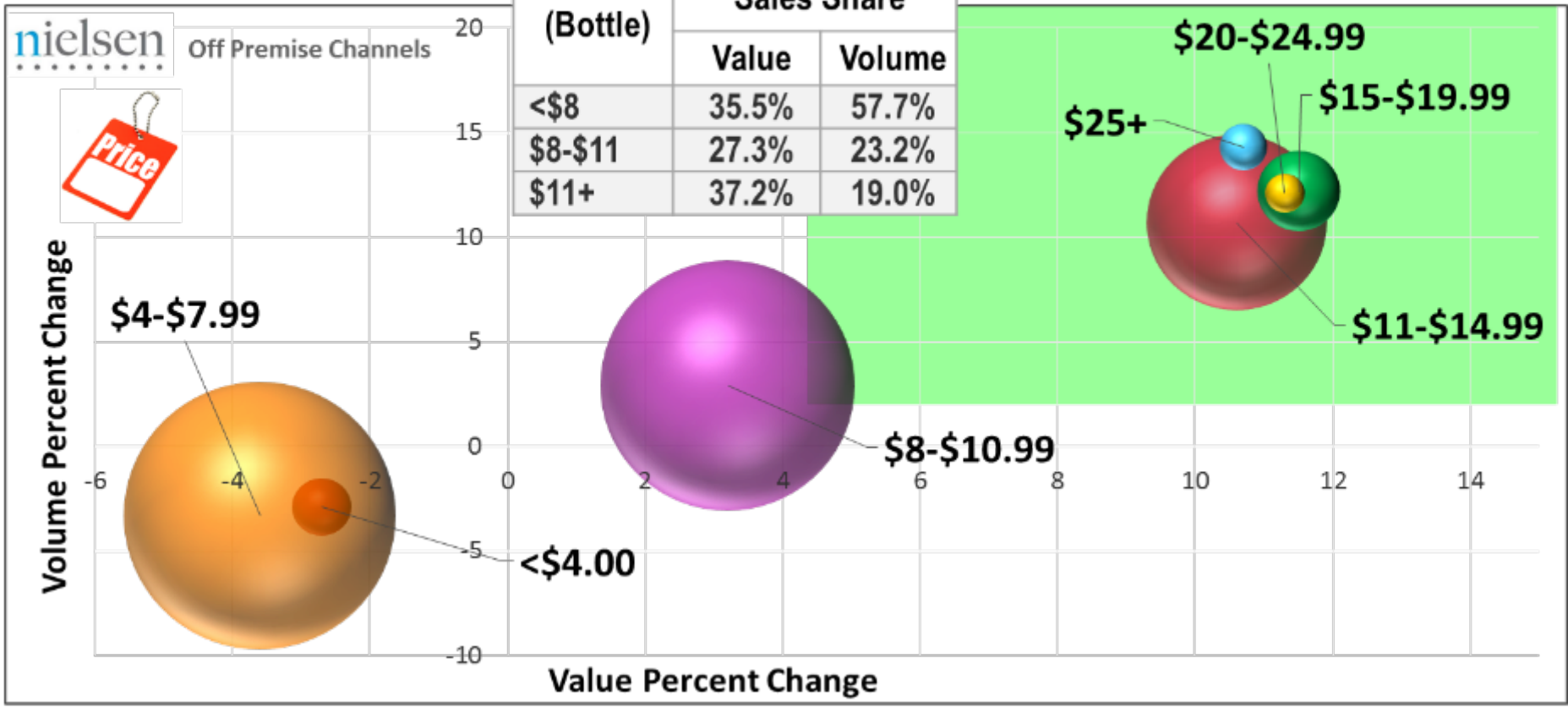
TABLE WINE (BOTTLE) GROWTH LED AT HIGHER END

Price Tier (Bottle)	Sales Share	
	Value	Volume
<$8	35.5%	57.7%
$8-$11	27.3%	23.2%
$11+	37.2%	19.0%



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Source: Nielsen Total U.S. All Outlets (xAOC + Liquor Plus + Conv + Military); 52 w/e 12-31-2016 (Bubble = Annual $ Size); Table Wine

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ALTERNATE PACKAGING VEHICLES

Wine on Tap

Single Serve

Cans

8% of volume

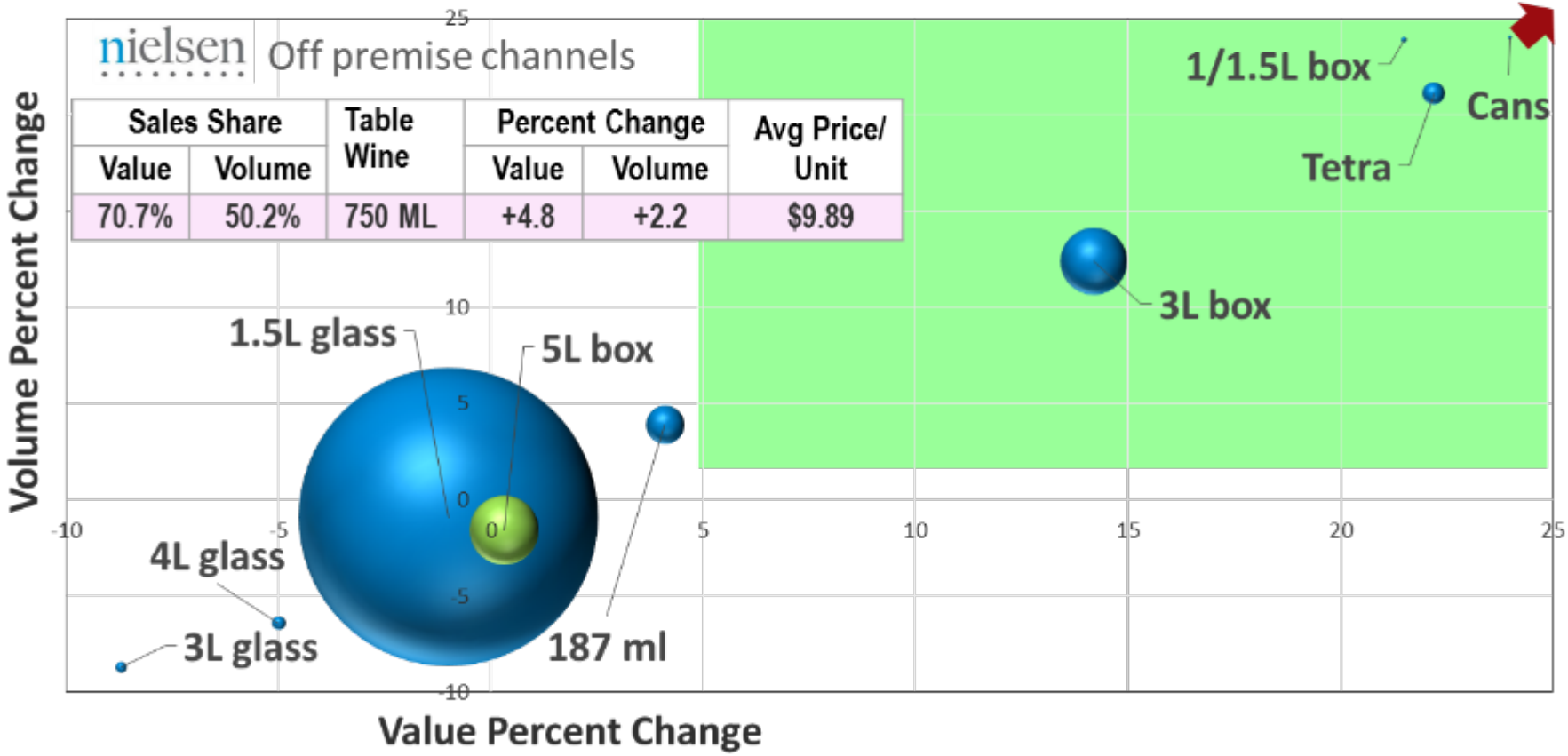
3L & Under Boxes: +15%

Tetra: +22%

nielsen

Source: Nielsen Total US xAOC + Liquor Plus + Conv + Military; 52 w/e 12-31-2016

ALERNATIVE PACKAGING – SMALL BUT GROWING AND MEETING ON OCCASION NEED



nielsen Source: Nielsen Total U.S. All Outlets (xAOC + Liquor Plus + Conv + Military); 52 w/e 12-31-2016 (Bubble = Annual $ Size); Table Wine

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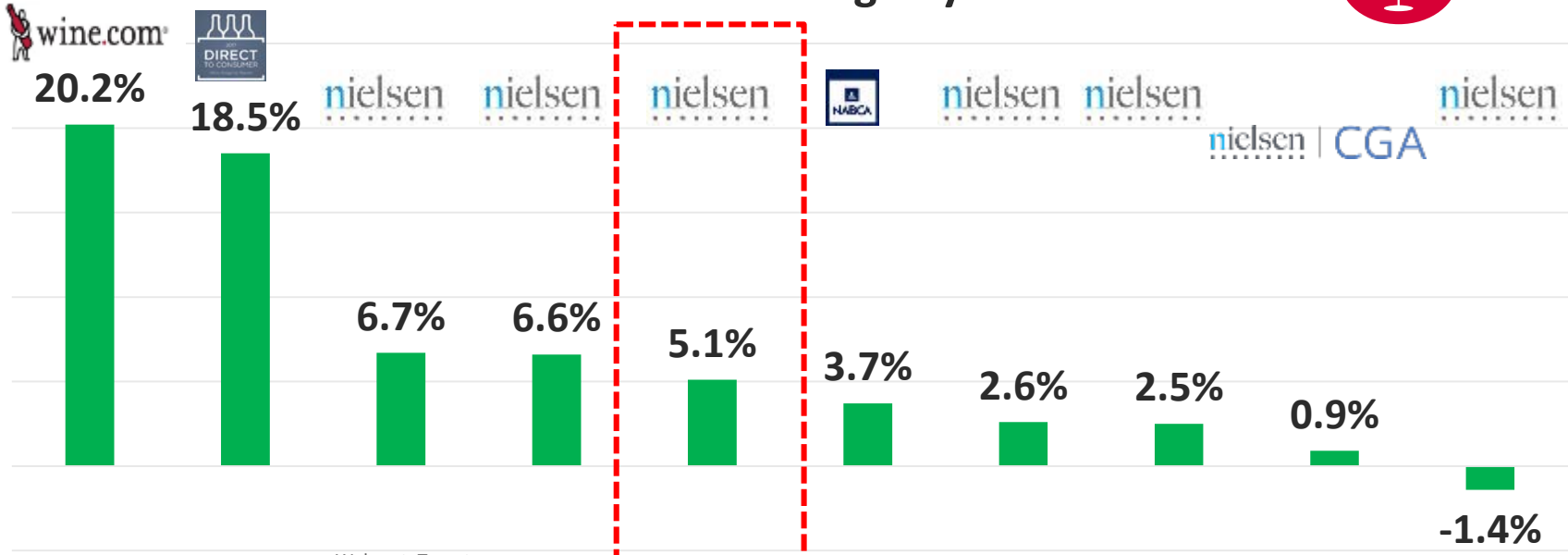
CHANNEL GROWTH RANGES…

Wine Dollar Percent Change by Channel - 2016



	Wine.com	DTC Shipments	Mass	Conv	Food	NABCA	Drug	Liquor	On Premise	Military
Annual $ Billions	$0.08	$2.3	$0.5	$0.8	$8.1		$0.4	$4.3	$17.1	$0.1
Price/ 750 ml	$30.72	$38.69	$6.81	$6.99	$7.34	$7.26	$5.26	$8.67	$40.05	$5.53

Source: : **Nielsen/Nielsen CGA - ; 52 weeks thru 12-31-2016
Wines and Vines/Ship Compliant –Annual 2016; Wine.com – Annual 2016; NABCA – Annual 2016

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WINE IS A TROPHY CATEGORY AT MAINSTREAM RETAIL

SCORECARD

Against **120** consumer packaged good categories that Nielsen measures – FLAT overall in sales - how does Wine stack up?

- A **top 10** category in size (where legal)
- **9th** best percentage dollar growth
- **6th** best absolute dollar gains
- A great **basket builder**

Source: Nielsen Total U.S. All Outlets (xAOC + Liquor Plus + Conv + Military); 52 w/e 12-31-2016; Overall CPG thru 12-17-2016

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WINE EXPANDS FOOD SHOPPING BASKETS

$42.67

$74.06

Wine: $16.85
PLUS
Other: $57.21

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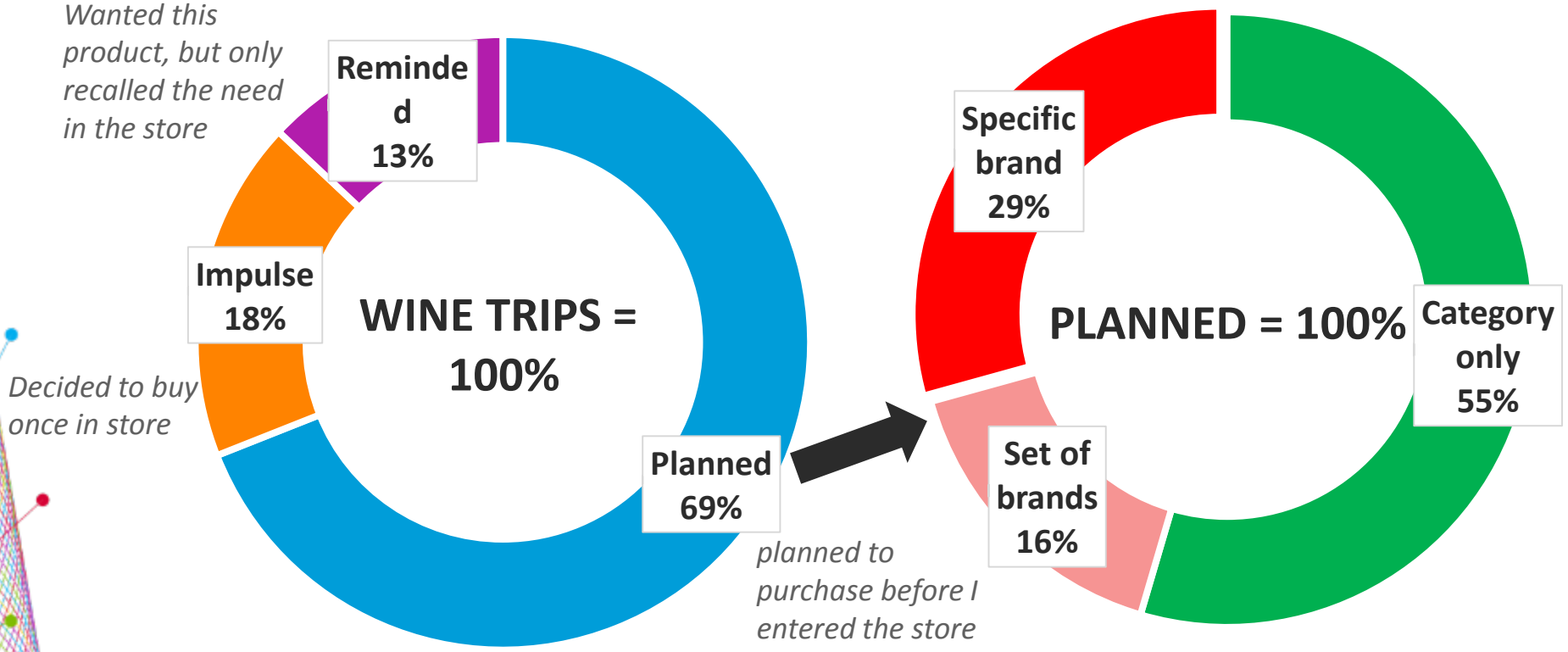
WINE CATEGORY TRIPS ARE HIGHLY PLANNED, NOT GENERALLY BY BRAND. IN-STORE FACTORS CRITICAL!!!



Source: Nielsen Bev Al Category Shopping Fundamentals (2016)

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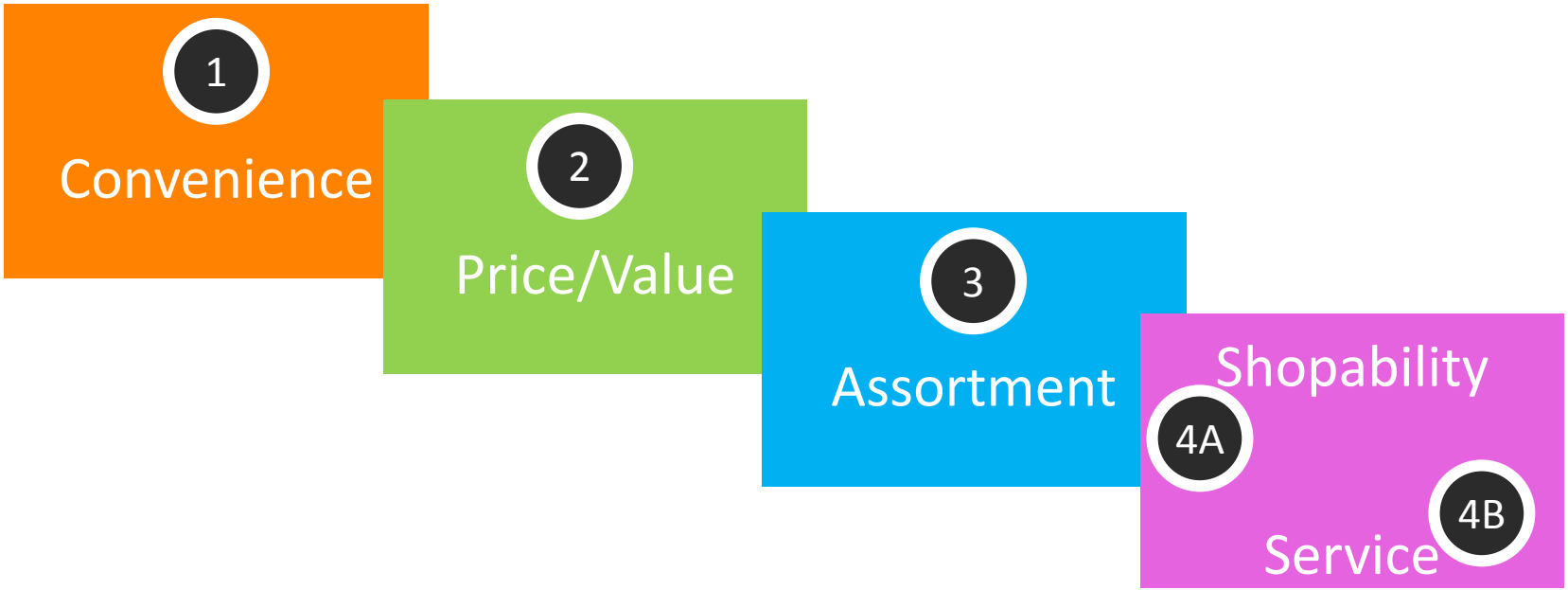
PRIMARY BEV AL STORE CHOICE DRIVERS



Source: Nielsen Bev Al Category Shopping Fundamentals (2016)

STORE CHOICE FACTORS SEPARATING WINE PURCHASING BY CHANNEL

Convenient location is #1: both Grocery and Liquor (U.S.) offer convenient locations

	GROCERY	LIQUOR
Level of Planning	Lower – category & brand	Higher – category & brand
Store choice drivers	Sales/promotion	Everyday low prices
	1-stop shop	Broad assortment; in-stock availability
Trip Type	Routine fill-in; general stock-up	Beverage Alcohol stock-up
Trip Mission		Special occasion; gift, treat
Intended Time	Higher same day use	Higher future use

Source: Nielsen Bev Al Category Shopping Fundamentals (2016)

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WHAT YOU SHOULD TAKE AWAY

1. U.S. Wine market is doing well – tailwinds outnumber headwinds, but with much change below the surface
2. Multiple retail channels co-exist in multiple U.S. states often satisfying different consumer needs/occasions
3. Do some/will some U.S. Wine retail and consumer trends apply to the Canadian/Ontario wine industry?

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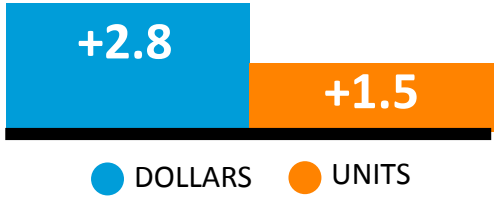
A PEEK NORTH…

CANADIAN CPG GREW 3% IN 2016

Online growing but lags global development

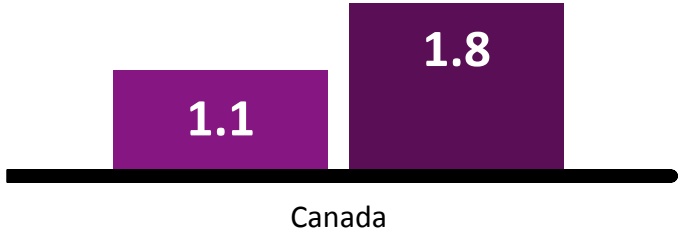
% CHANGE – TOTAL TRACKED SALES



% OF DOLLARS

	CANADA
GROCERY	43.4%
WAREHOUSE	12.4%
MASS MERCH.	11.0%
DRUG	6.0%
GEN MERCH/DEPT	5.2%
ONLINE	1.8%
DOLLAR	1.4%

ONLINE $ SHARE OF CPG – 2012 VS 2016



Source: Homescan Cross Outlet Facts – 52 weeks to October 10,2016 | Nielsen: MarketTrack - Total Tracked Sale 52 wks ending December 10, 2016

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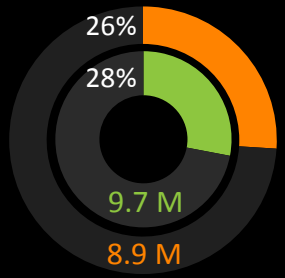
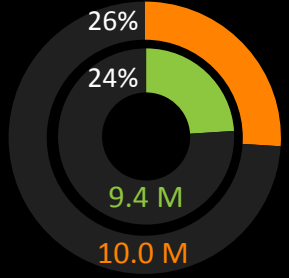
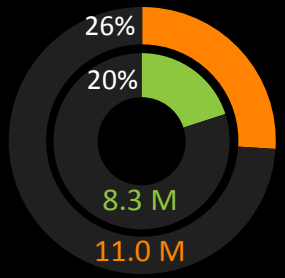
MILLENNIALS TO SURPASS BOOMERS BY 2020 IN CANADA

<19 'Gen Z'	19-37 'Millennials'	38-47 'Gen X'	48-67 'Boomers'	68+ 'Greatest'
16%	27%	14%	28%	14%
Millions 5.7	9.4	4.7	9.8	5.0

MILLENNIALS
BOOMERS







TOTAL CANADA	34.2 M	38.4 M	42.1 M

Source: Statistics Canada – Census 2011

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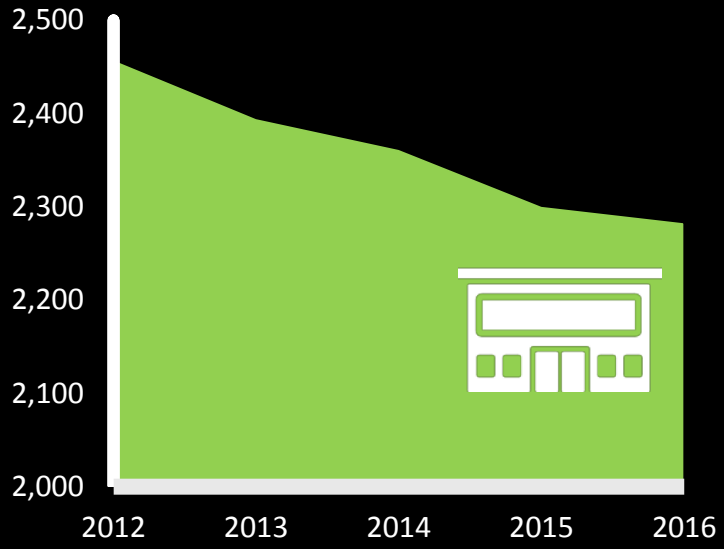
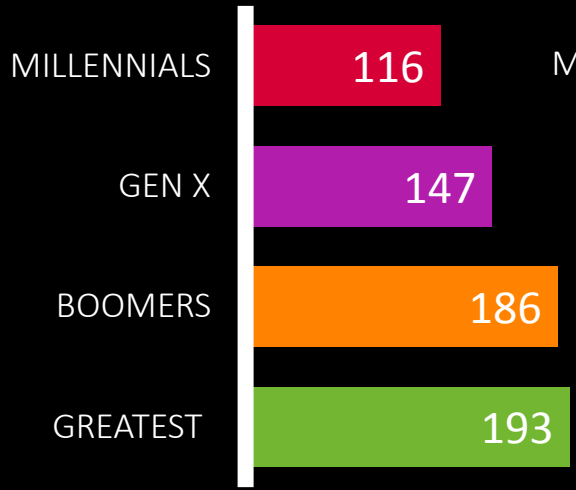
MILLENNIALS WILL FUEL FUTURE DECLINES IN STORE TRAFFIC

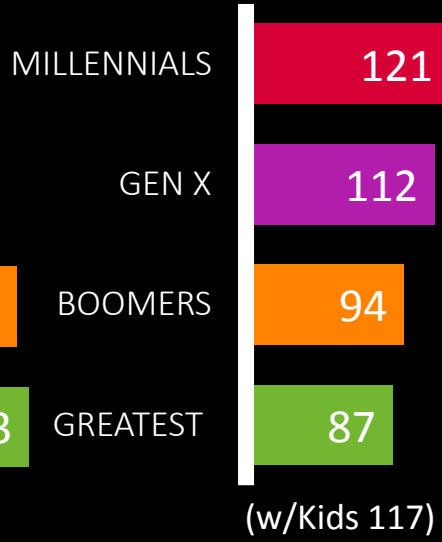
TOTAL OUTLET TRIPS (*Millions*)



ANNUAL TRIPS PER HOUSEHOLD



Extra Light Drinkers
(0-2 DRINKS PER WEEK INDEX)



Nielsen Homescan Cross Outlet Facts: 52 weeks to October 1, 2016, Trips/ HH National All Channels 52 weeks ending April 19, 2016

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WINE HAS OUTPACED CPG GROWTH

	2010 ($B)	2015 ($B)	5YR CAGR
TL ALCOHOL	18.9	21.3	2.4%
WINE	5.3	6.7	4.6%
SPIRITS	4.3	4.9	2.6%
BEER	8.7	9.0	0.6%

CPG TRACKED SALES
5 YR CAGR – 3.1%

Source: Statistics Canada. Table 183-0023 - Sales and per capita sales of alcoholic beverages | Nielsen: MarketTrack - Total Tracked Sale 52 wks ending December 10, 2016

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WINE'S GROWTH AN OPPORTUNITY FOR GROCERY STORES

	2010 ($B)	2015 ($B)	5YR CAGR
WINE	5.3	6.7	4.6%
MILK	2.6	2.5	-0.2%
CHEESE - EXACT WEIGHT	2.0	1.9	-1.0%
BREAD - COMMERCIAL	1.6	1.7	1.1%
SNACK FOODS	1.4	1.8	5.0%
YOGURT	1.2	1.5	4.4%
RTE CEREAL	1.2	1.1	-0.6%

Source: Statistics Canada. Table 183-0023 - Sales and per capita sales of alcoholic beverages | Nielsen: MarketTrack - Total Tracked Sale 52 wks ending December 10, 2016

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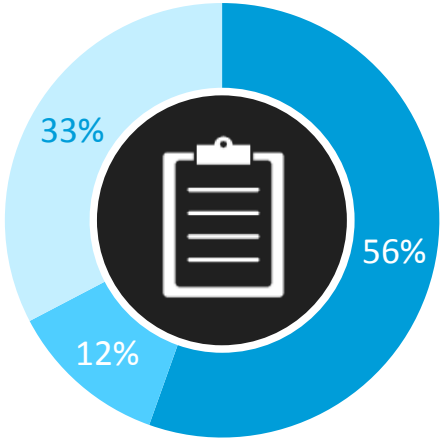
OPPORTUNITY TO DRIVE TRIPS & BASKETS WITH WINE

LEVEL OF PLANNING

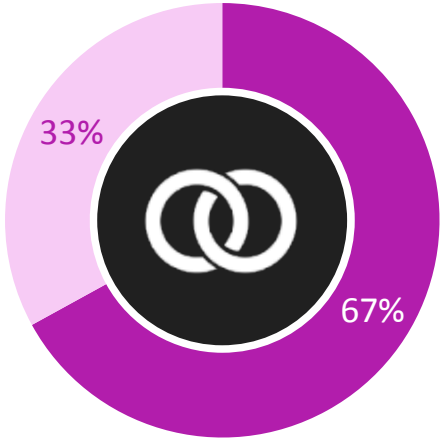
(107% Index)



- PLANNED
- REMINDED
- IMPULSE

IN-AISLE MODALITY

(118% Index)



- ENGAGED
- AUTOPILOT

Source: The Nielsen Company, Category Shopping Fundamentals, National, 2016.

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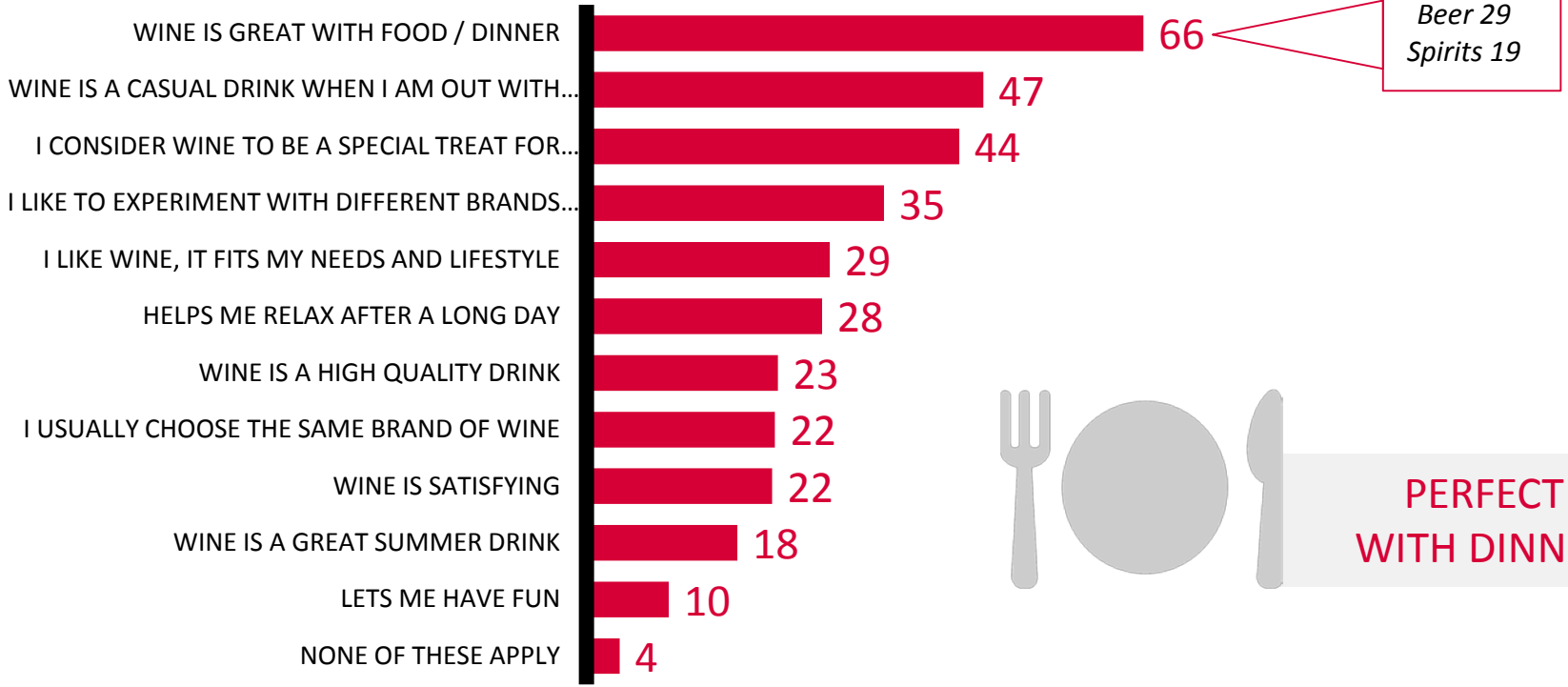
WINE IS A POPULAR MEAL ACCOMPANIMENT

% Of consumers by drink associations – **wine**



Source: PanelViews Omnibus January/February 2016
Base: CONSUMED WINE IN PAST 4 WEEKS AND ASSIGNED "WINE" TO EVALUATE FOR Q11, n= 1030
Q11. Please select the statements that you associate with your consumption occasions of **<DRINK TYPE>**. Please select all that apply.

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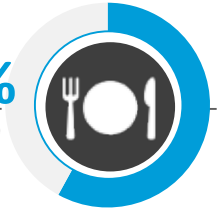
WINE CONSUMPTION IS CENTRED AROUND DINNER WHILE APPEALING TO OUR INDULGENT SIDE

% OF OCCASION TYPE

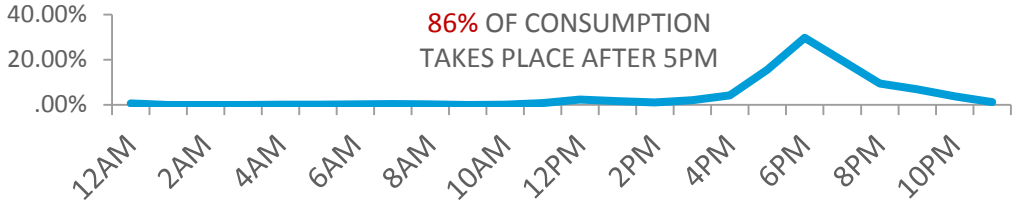
93% OF MEAL CONSUMPTION AT DINNER

58% W/FOOD



42% BEVERAGE

% OF MEAL HOUR



86% OF CONSUMPTION TAKES PLACE AFTER 5PM

CONSUMPTION IMAGE

TOP ITEMS AT SNACK OCCASIONS

CHEESE	18%	CHOCOLATE	5%
SNACK CRACKERS	9%	MELBA TOAST	3%
COOKIES	7%	APPLES	3%
POTATO CHIPS	6%	CREAM CHEESE	3%
ALMONDS	5%	GRAPES	3%
TORTILLA CHIPS	5%		

TOP NEED STATES (INDEXED TO ALL CONSUMPTION OCCASIONS)

INDULGENT	201
EMOTIONAL	184
BALANCE	142

LIKELY FULFILLING INDULGENT AND EMOTIONAL NEEDS ; 18% OF SNACK CONSUMPTION OCCASIONS INCLUDE CHEESE

Source: The Nielsen Company, Consumption Diary, National, 52 weeks ending G3 – 2016.

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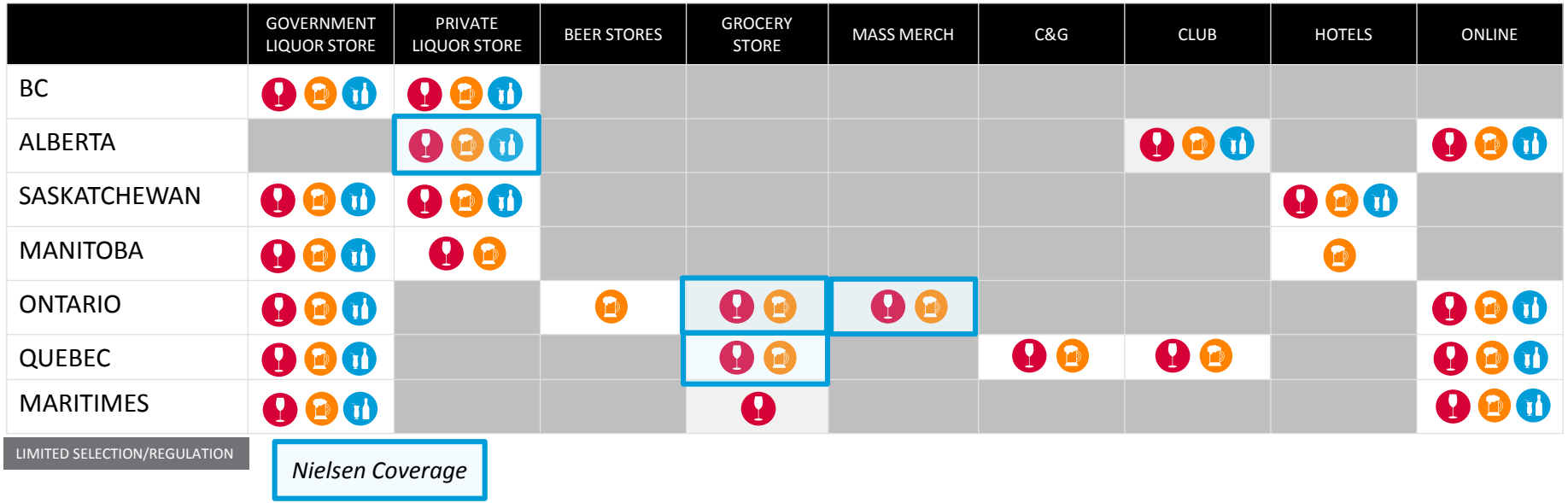
BUYING ALCOHOL IN CANADA IS COMPLICATED



NIELSEN BEVAL VISION: PROVIDE A HOLISTIC VIEW OF THE BEVAL INDUSTRY FOR CANADA AS A LEADING INDEPENDENT DATA MEASUREMENT COMPANY.

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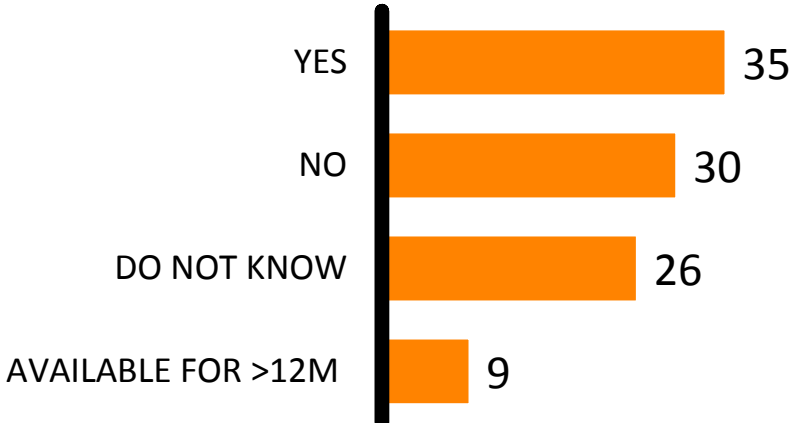
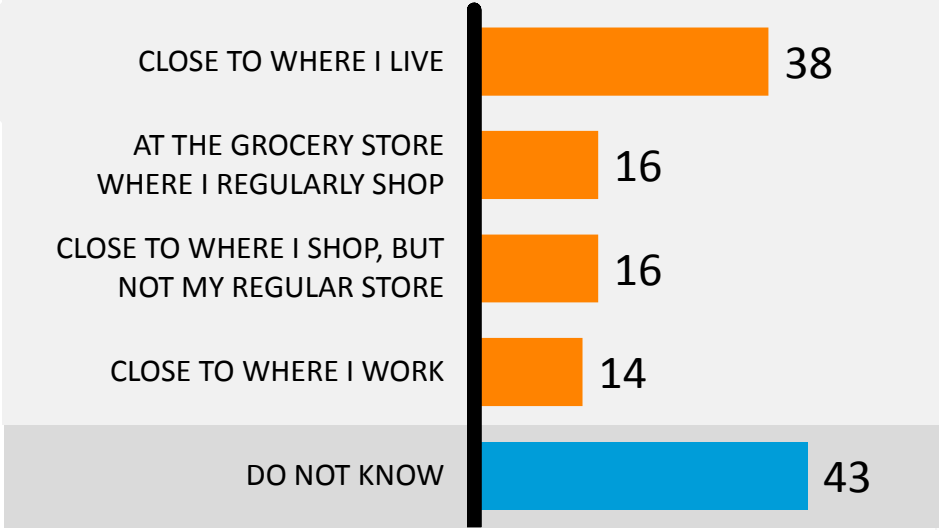
CONSUMER ARE NOT CLEAR ABOUT WINE IN GROCERY

% AWARE OF CHANGES



% OF THOSE AWARE: WHERE CAN THEY BUY



BASE: P3M HOME CONSUMPTION WINE PURCHASERS, ONTARIO, n= 878.
Source: Nielsen PanelViews, October/November 2016
Q5. Have grocery stores/supermarkets in your province started selling beer and/or wine in the past 12 months

BASE: ONTARIO AWARE OF CHANGE, n=301.
Please select all that apply.

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CONSUMERS APPRECIATE CONVENIENCE OF WINE IN GROCERY

% Agree *- Perceived effects of recent change among Ontario wine purchasers*

Beer Drinkers

35% Enjoy Convenience of Shopping in Grocery

BASE: P3M HOME CONSUMPTION WINE PURCHASERS IN ONTARIO AWARE OF CHANGE, n=301.
Source: Nielsen PanelViews, October/November 2016
Q8. How, if at all, has the recent change affected your perceptions of beer and / or wine?

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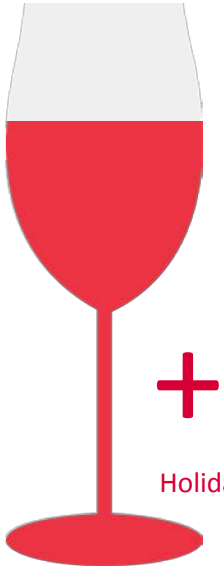
CONSUMERS ARE ADJUSTING TO THE OPTION OF GROCERY

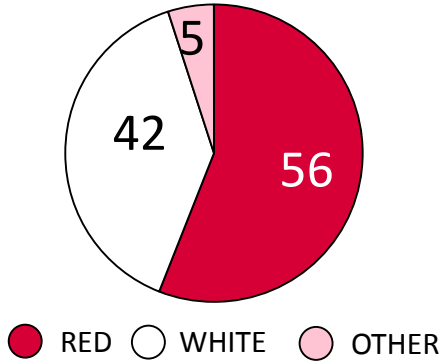
$1M+

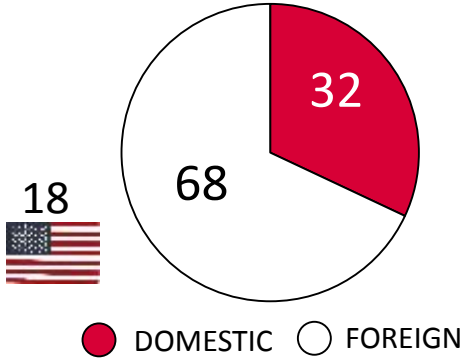
*Wine Sales in First full Month



+75%

Holiday Lift in Wine Sales





ONTARIO GROCERY ROLL OUT:

- *70 Stores Licensed to sell beer in October 28, 2016*
- *+70 Stores Bidding – Announcement May 2017*
- *Ontario Target 450 Selling Beer & Cider | 300 Selling Wine*

Source: Nielsen MarketTrack – Tracked Ontario Grocery Stores P/E Jan 9th, 2016

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ONTARIO CONSUMERS HAVE PURCHASED COMPLIMENTARY CATEGORIES WITH WINE

Ontario Baskets with Wine

$45
Avg. Basket Without Wine

$78
With Wine

	% TRIPS*	TRIP INDEX
SNACK FOODS	22.2%	195
MILK	20.9%	100
CARBONATED SOFT DRINKS	17.1%	232
CHEDDAR CHEESE	14.2%	157
BEER PRODUCTS	12.9%	772
SNACK CRACKERS	11.3%	141

**Low Raw Buyers - Directional*

Source: Nielsen Panel, Ontario Grocery 2016 | https://vimeo.com/90261206

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WHAT YOU SHOULD TAKE AWAY

1. U.S. Wine market is doing well – tailwinds outnumber headwinds, but with much change below the surface
2. Multiple retail channels co-exist in multiple U.S. states often satisfying different consumer needs/occasions
3. Do some/will some U.S. Wine retail and consumer trends apply to the Canadian/Ontario wine industry?
4. For Grocery in Ontario, critical to build consumer awareness of Wine availability
5. Opportunity to partner with retailers and other manufacturers around Wine ‘baskets”

Cheers!

nielsen

AN UNCOMMON SENSE OF THE CONSUMER™

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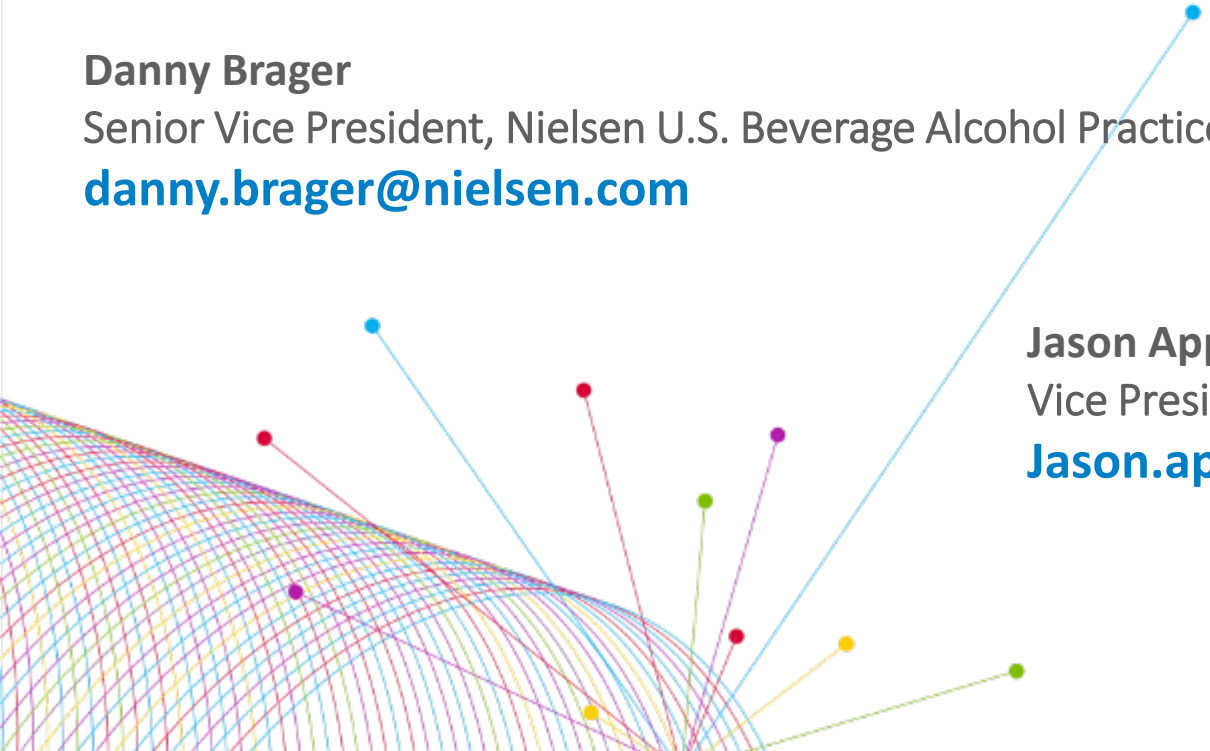
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