The Grocer

Focus On: Wine & Champagne by Simon Gwynn (simon.gwynn@thegrocer.co.uk)

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The Story

- **Chin chin! Wine and Champagne is in strong growth, with value and volumes up. Look no further than the astounding growth of Prosecco, which has seen sales more than double in the past year, for a key driver of the growth. Why is it doing so well? How are the market's other sub sectors performing and why? How are different retailers cashing in on the craze for Italian fizz? And how are players in decline looking to turn things around?**

Key themes:

Prosecco: Brits now knock back more Prosecco than they do Cava and Champagne combined, after sales more than doubled in the past year. Which brands, retailer exclusives and own label lines are driving this growth and how? How are merchandising and featured space promotions (such as the introduction of gondola end chillers) helping? What about the discounters and convenience?

Still wine: Of course, still the biggest part of the market by a long shot. Value has grown on flat volumes in the past year. Average price is up slightly; is this a reflection of duty, premiumisation or something else? How are brands looking to compete with the increasingly strong premium own label lines of the retailers?

Champagne: Value is down but volume is up, suggesting that prices have been lowered or deals have been increased in a bid to shift volumes. This feature will explore the factors that are driving the Champagne market at present, from the dynamic between the long established grand marc Champagne houses and own label through to price, promotions, sponsorship and advertising.

Cava and other sparkling wines: This feature will also investigate how other sparkling wines and Cava are looking to compete with the seemingly unstoppable march of Prosecco. With Cava having lost value in the past year, what are brands and own label supplier doing to recover?

The retail mix: Key to this feature will be a discussion of how different retailers, particularly the discounters, are performing in this market. How do their approaches differ and to what extent are they using the strength of their retailer exclusive and own label wines as a point of difference?

Own label: This feature will explore in detail the factors that are driving such strong growth in own label still and sparkling wine. It will pay particular attention to the retailers capitalising on this trend and the growth in retailer exclusive brands.

Brands: Despite the strong growth in own label wine, a number of brands have still managed to grow in the past year. Who? And how have they used factors such as price, promotions, NPD, branding, PoS and advertising to drive sales?

Innovation: This will be key to this feature. We will be investigating how new product development has shaped the category over the past year and what is in store for shoppers in 2014. We will be profiling four of the most interesting launches in a separate innovation panel.

Promotions: This feature will explore how the promotional strategies of retailers and brands have changed over the past year. Attention will be paid to the promotional strategies of retailers and how this has affected average prices over the past year.

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest brands have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?