

### Agenda

- Best selling wine countries
- Tax and Shelf-price
- Tendering differences
- Q&A Time
- Reference list & links

Note: focus is on "wine" but it is same tender process for other product types





# What is the overall view of Scandinavian markets' sales in 2022?

Overall view of market sales in 2022 (in liters)

Wine sales 2022						
Sweden (10,4)		Norway (5,3)		Finland (5,5)		
Total sales	Organic	Total sales	Organic	Total sales	Organic	
214 593 000	54 253 275	77 773 841		48 834 000	9 484 000	
	25%				19,04%	

Other product sales 2022							
Sweden		Norway		Finland			
Total sales	Organic	Total sales	Organic	Total sales	Organic		
313 668 000	18 947 527	17 062 838		9 769 700	501 000		
	6%				5,13%		

- Other products include beers, spirits, mixed-drinks, ciders, alcohol free beverages...
- Sweden represents the biggest market for both categories
- Organic products' sales are growing
- There is a higher range of organic wines than organic spirits or beers (other products)

You can find all data sources at the end of the presentation

### What are the top selling countries for wines in 2022?

Red wines								
	Sweden			Norway			Finland	
Country	Liters	Market share	Country	Liters	Market share	Country	Liters	Market share
Italy	39 373 516	40,40%	Italy	15 290 181	35,80%	Chile	4 475 000	21,90%
Spain	10 014 049	10,30%	France	5 910 842	13,85%	Italy	4 383 000	21,50%
France	9 448 420	9,70%	Spain	5 730 083	13,42%	Spain	3 337 000	16,30%

White wines								
	Sweden			Norway			Finland	
Country	Liters	Market share	Country	Liters	Market share	Country	Liters	Market share
South Africa	11 349 836	16,20%	Germany	6 207 958	26,70%	Chile	4 802 000	23,10%
France	10 928 520	15,60%	France	5 752 377	24,74%	Germany	4 701 000	22,60%
Spain	8 219 834	11,70%	Italy	2 316 354	9,97%	Italy	2 554 000	12,30%

Rose wines					
Norway Finland					
Country	Liters	Market share	Country	Liters	Market share
France	2 146 847	51,87%	France	458 000	23,30%
Italy	795 247	19,21%	Italy	335 000	17,07%
Chile	263 912	6,38%	Spain	269 000	13,70%

Sparkling wines					
Norway Finland					
Country	Liters	Market share	Country	Liters	Market share
France	2 736 432	39,86%	Italy	2 280 000	40,20%
Italy	2 580 840	37,59%	Spain	1 740 000	30,70%
Spain	1 137 782	16,57%	France	1 132 000	19,90%

The Swedish monopoly does not share information on rose and sparkling wines sales.

# A major element in the price decision: taxes on alcoholic beverages

Taxes on alcoholic beverages in Scandinavia will drastically change the pricing decision. They all vary depending on the country. Here is an overview of what the taxes level would be for 2 different products, based on the alcohol percentage and packaging.

Product/Country	Sweden		Norway		Finland
	Local currency	EUR	Local currency	EUR	EUR
Red wine, 13%, 1L	27,49 SEK	2,48 €	64,35 NOK	5,90 €	4,72 €
Red wine, 13%, 750ml	20,62 SEK	1,86 €	48,26 NOK	4,40 €	3,15 €
Spirit, 40%, 1L	208,704 SEK	18,95 €	338 NOK	30,93 €	20,65 €
Spirit, 40%, 700ml	146,09 SEK	13,26 €	236,6 NOK	21,65 €	14,44 €

### Pricing examples for Wine

	Shelf price				
Price EXW	Sweden Norway		Finland		
2,00€	7,00€	11,50€	11,00€		
12,00€	22,00€	31,00 €	34,00 €		
100,00€	155,00€	149,00€	182,00€		

	Sweden	Norway	Finland
	Sweden	Norway	rillialiu
Alcohol tax based on a wine of 13% and in a bottle of 750ml	1,86 €	4,40 €	3,15 €
VAT in each country	25%	25%	24%
	4.4 = 0.04	220/	=
Monopoly markup	14,70%	22%	54%
Fired was a sub-used we	0.5.0	0.70.6	
Fixed monopoly markup	0,5 €	0,70€	

In Norway, from 5€ EXW, the monopoly's percentage margin slowly goes down and they never charge more than 11€.

In Finland, from 15€ EXW, the monopoly's percentage margins slowly goes down (but slower than Norway).

## Tendering differences?

- Type of tenders
- Tender announcements
- Specification of the tender
- Judgement paperwork stage
- Samples
- Tasting session
- Selection of winners
- Result announcement

### Type of tenders

### Systembolaget (Sweden)

- Permanent listing (FS) | TSV | Seasonal

### Vinmonoplet (Norway)

Permanent listing | One time buy | Permanent or one time buy

### ALKO (Finland)

- Permanent listing | Service product | One time buy | Seasonal

(Note: All markets have exclusive assortment, however it is different tender procedure for this matter, Concealed Wines only work with Exclusive assortment in Sweden)

### Tender announcements

#### Systembolaget

- For permanent listing first a "launch plan" then 4 times a year "final tenders"
- For TSV monthly approximate 9-10 times a year. (Last Thursday of the month)

Dates 2023: 19th January, 23rd March, 15th June, 14th September

#### - ALKO

- 2 Times a year "new purchase plan" that cover coming 6 month.
- Seasonal announcements 3 times a year.

Dates 2023: February, End of May, End of September

#### - Vinmonpolet

- 2 times a year "new purchase plan"

Dates 2023: 1st of June and 1st of September

Taste and style:

### Systembolaget

- Most specific in terms of requirement they ask for.

### **ALKO** and Vinmonopolet

- Broader style descriptions.

### Example taste/style

Systembolaget - Organic White 2022 AOP Bergerac (A) | 307-28

Style: We are looking for a dry, fresh and flavorful wine with elements of yellow fruits, grilled lemon, gooseberries, nuts, nettles and barrels.

Other criteria: -

Vinmonopolet - Single varietal Nocera from Sicily 2020 | 202311022

Style: Aromatic quality, Complexity

Other criteria: Discreet or no influence of wood

ALKO - Pinot Nero from Trentino-Alto Adige | W230411

Style: Berried & fresh or Luscious & jammy

Other criteria: -

#### Volumes:

- Sweden state min volume required. You need to secure this volume of same vintage.
- Finland, state estimated yearly volumes, we add min volume to offer.
- Norway does not state volumes at all. We estimate min and yearly vol.

#### Size of distribution:

- Sweden and Finland define in advance type of distribution in x number of stores and type of stores
- Norway decide after the blind tasting size/type of distribution depending on quality, price and volume.

#### Vintage:

 Systembolaget and Vinmonopolet more or less always specify vintage, where ALKO only ask for vintage wine, and producer can select vintage to offer.

### Organic/Sustainable/Vegan:

- Systembolaget and Vinmonopolet specify "organic" and/or "sustainable" where ALKO instead put it as not compulsory but as advantageous.

#### Appearence of the product

- ALKO may have requirements. Example "Theme product" or product to reach a given audience.

#### Grapes:

- Much more specified by Systembolaget, less specified by Vinmonopolet and ALKO

#### Classification:

- More specified by Systembolaget and Vinmonopolet. ALKO have a broader approach.

### Judgement paperwork stage

- Systembolaget has a harder approach where a pre-selection is done of what would pass to tasting, while most goes to tasting stage.
- For Vinmonopolet and ALKO most pass to the tasting stage, given that technical criteria is fulfilled. (exception, when Vinmonopolet state lowest price only pass to the tasting)

### Samples

- Systembolaget and Vinmonopolet you can always send 750 ml unless it says final packaging.
- ALKO, final package is required, if not ready, a mock-up is needed, in correct container format.

All monopoly clients accept tank samples, but have to be prepared as a final product.

### Tasting session

#### Differences in Selection process Tasting part

- Sweden, taste blind, 3 tasters, one is person that has written the tender, no judgement visual
  aspect. The market where it is highest focus on taste/style description.
- Norway 5 tasters, no judgement visual aspect.
- Finland, serveral that taste blind, however after they also judge the visual aspect and advantageous aspect. (Wine: 75% on taste and 25% on other / Spirits: 50 % on taste and 50% other)

### Selection of winners

#### Differences in how winner is selected:

- Systembolaget choose the first winning product with highest score in blind tasting. (sometimes several wines selected for TSV)
- Vinmonpolet can take any of the top 3 (normally) best ranked wines in sensory tasting, where price and available volumes have an impact.
- ALKO, take in consideration appearence of product and "advantageous" aspect as well as the outcome from blind tasting.

### Result announcement

### Systembolaget

- Score of your wine | Score of winner | Selected product/s | Number of partcipants

### Vinmonopolet

- Position of your wine | Selected product/s | List of all participants

#### **ALKO**

- Selected product/s | Your approximate position (best third, middle third, last third) | Number of partcipants



### How should you allocate your time?

Think of what is important to care about in each market. Skip for instance to focus on presentation for Swedish tender, while you instead have to focus on the taste profile more.

Make sure that the importer you work with have a clear understanding about each markets and the rules of the game.

If you want to be much more pro-active in the market, make sure to have a plan for it and invest time to be pro-active in the market.



### Questions and Answers

No	Question	Answer
1	Would dealcoholised wine with under 5.5% be sold in supermarkets?	It will depend on the rules of the countries. We know that there are "alcohol free" wines in Systembolaget shops here in Sweden.
2	In Sweden above 3.5° beverages are sold by monopoly, but in Norway and Finland this goes up to 5°?	Yes, in Norway and Finland, you can find beers and ciders in supermarkets if they are under 5% ABV. This is why the volume of beer sold by Systembolaget is so higher than in Finland and Norway.
3	Is it possible to sell spirits at 35% ABV?	Yes, if the monopoly publishes a tender and requests a spirit, you can always check if the ABV has a specific requirement.
4	Does the table on the top show the final shelf price incl. the taxes below? (slide 7)	Yes, the shelf price is what consumers are going to pay in the different countries.
5	Is the fixed markup included in the % markup or added on top?	It is added on top.
6	If we don't have an importer in any of the 3 countries, does Concealed act as winery's importer?	Yes, we can work with you on projects for all 3 monopolies!

7	With us located in the Southern Flinders Ranges of South Australia which is not a main stream Appellation is there an opportunity to do a direct presentation to the Three Monopoly markets	We have tenders that ask for rare appellations from time to time, it might be applying to your appellation as well one day. Also several tenders ask for wines from a broader region or even all Australia.
8	Can we work with different importers for the same monopoly?	It will be specified in the tender, but most of the time only one offer per producer will be accepted. If you offer your product multiple times, the monopoly might cancel your offer or choose the cheapest one.
9	Hi everyone, sorry I have probably missed something but what is "TSV" please?	It is a one time buy tender that usually asks for smaller volume to sell in less stores. If the product sells well, they can then buy it again.
10	Does the application need to be done always through an importer? I.m new on this	You need to have a specific license to import wine in Sweden, Finland and Norway, which Concealed Wines has. We help producers to import thanks to our license.
11	I would like to know more in detail all the steps to be able to participate in the tenders, quantities and above all processes to bequeath my wines from my winery	We would recommend you to watch our latest webinar about Systembolaget available on our YouTube channel, for which we talked about the tendering process.

Answer

Question

No	Question	Answer
12	I would like to ask the same question, is Concealed wines able to purchase to supply on premise wine sales, like restaurants cafes and wine bars	We do have a Horeca department in Concealed Wines. We would recommend you to contact us and we can explain you about it.
13	The success of the South African white wine in volumes, is that mostly bag in box or 750 ml? Which wine styles also at a specific price segment?	DON T KNOW HOW TO ANSWER
14	Which wines (red/white) and what is the biggest buyers for Spanish wine?	Spain is a big country for red wines in the monopolies (always in the top 3!). For white wines, Spain is in the top 3 for Sweden only. You can check top 10 on slide 29 as well.
15	About payments if someone won a tender, how does It work? Is the same for each market or are there any differences?	We have our own payments systems for when you win a tender. We would recommend you to get in touch with us si that we can help you on this matter.

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13	The success of the South African white wine in volumes, is that mostly bag in box or 750 ml? Which wine styles also at a specific price segment?	Mostly BIB, a few products fairly big part of the volumes.
14	Which wines (red/white) and what is the biggest buyers for Spanish wine?	Spain is a big country for red wines in the monopolies (always in the top 3!). For white wines, Spain is in the top 3 for Sweden only. You can check top 10 on slide 29 as well.
15	About payments if someone won a tender, how does It work? Is the same for each market or are there any differences?	We have our own payments systems for when you win a tender. We would recommend you to get in touch with us si that we can help you on this matter.



### Relevant links for sales and tax data

Swedish tax (swedish):

https://skatteverket.se/foretag/skatterochavdrag/punktskatter/alkoholskatt/skattesatser.4.4a47257e143e26725aecb5.html

Norway tax (english):

https://www.skatteetaten.no/en/rates/alcoholic-beverages/

Finland tax calculator (english):

https://www.vero.fi/en/individuals/tax-cards-and-tax-returns/arriving in finland/bringing-alcohol-and-tobacco-to-

finland/alcoholcalculator/

Systembolaget sales reports (swedish):

https://www.omsystembolaget.se/foretagsfakta/systembolaget-i-siffror/forsaljningsstatistik/

Vinmonopolet sales reports (norvegian):

https://www.vinmonopolet.no/content/om-oss/salgstall

Alko sales reports (english available):

https://www.alko.fi/alko-oy/uutishuone/myyntitilastot/myynti

### Top 10 selling countries for red and white wines 2022

### Systembolaget

### Vinmonopolet

#### Alko

Sweden		Sweden	
Red Wines	Sales in 2022	White Wines	Sales in 2022
Italy	39 373 516	South Africa	11 349 836
Spain	10 014 049	France	10 938 520
France	9 448 049	Spain	8 219 834
USA	8 566 491	Germany	8 012 669
Australia	6 928 992	Italy	7 626 568
Portugal	6 880 177	Australia	5 089 598
Chile	6 090 236	Chile	3 694 359
South Africa	5 176 340	Argentina	2 552 439
Argentina	2 362 499	Hungary	2 277 288
Burgary	1 266 803	Portugal	2 275 070

Norway		Norway	
Red Wines	Sales in 2022	White Wines	Sales in 2022
Italy	15 290 181	Germany	6 207 958
France	5 910 842	France	5 752 377
Spain	5 730 083	Italy	2 316 354
USA	4 017 831	Chile	2 119 902
Chile	3 298 565	Australia	1 232 709
Australia	3 105 648	Portugal	1 137 541
Portugal	2 617 065	New Zealand	809 736
Argentina	875 978	Hungary	712 783
South Africa	737 846	South Africa	672 184
Lebanon	348 188	Austria	654 806

Finland			
Red Wines	Sales in 2022		
Chile	4 475 000		
Italy	4 383 000		
Spain	3 337 000		
Portugal	3 179 000		
Australia	2 261 000		
France	892 000		
Argentina	634 000		
South Africa	567 000		
United Africa	545 000		

Finland			
White wines	Sales in 2022		
Chile	4 802 000		
Germany	4 701 000		
Italy	2 554 000		
South Africa	2 141 000		
Spain	1 678 000		
France	1 265 000		
Australia	1 168 000		
Hungary	705 000		
Portugal	466 000		



### www.concealedwines.com



Calle Nilsson calle.nilsson@concealedwines.com (Skype ID: callenil)

Sign Up - Access 100% tender details



On this page Concealed Wines present Monopoly tenders announced by Systembolaget, ALKO and Vinmonopolet for producers from France.

See tenders

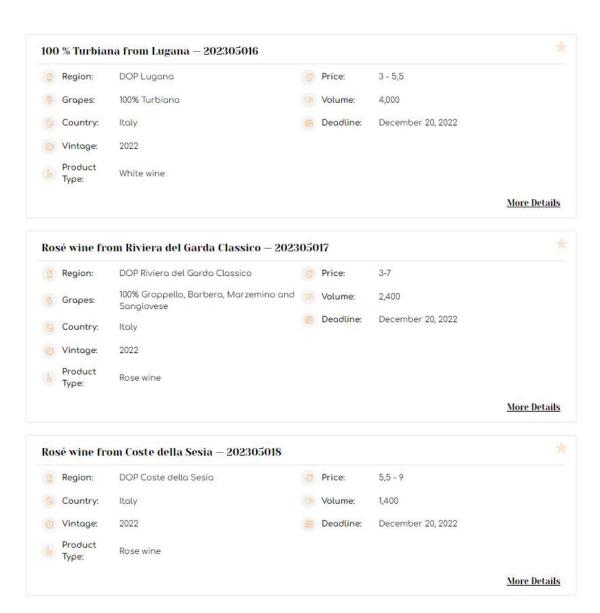










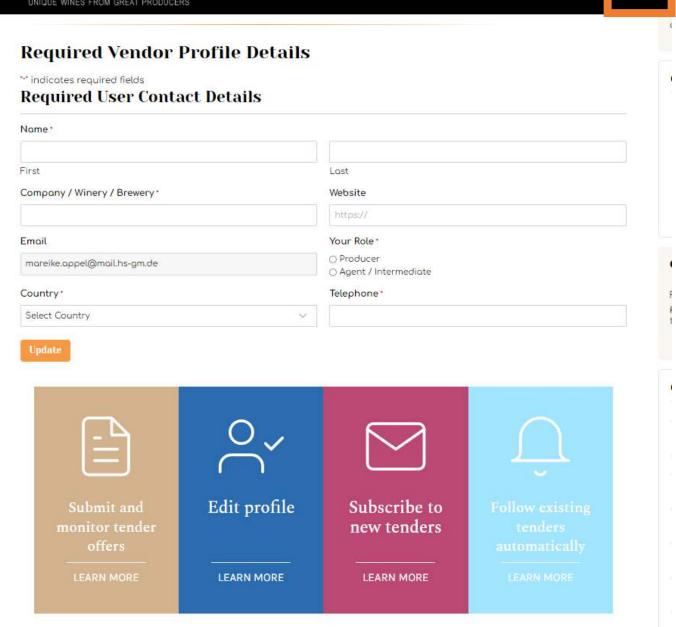


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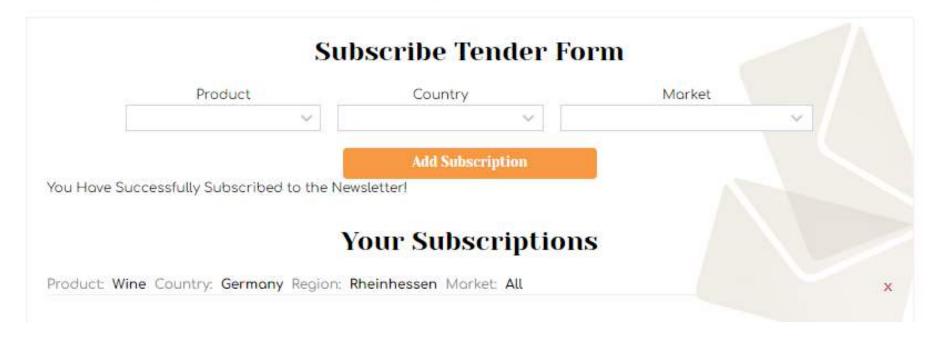
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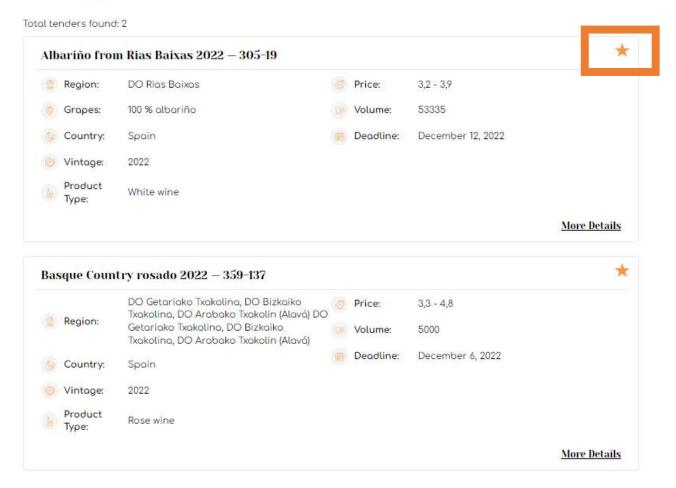
You can make many subscriptions with different combination of tags. Each combination will appear on a separate line below the form after the button "Add Subscription" is clicked. You can delete a combination by clicking on the cross apposite the line.

Use tag "All" for Product field to subscribe for new tender of any product. Do the same with County, Region and Market fields. Use tag "wine" to subscribe for new tender of any wine.



#### Tracking tenders

Here you can see all the tenders you marked, in order to receive notifications of the start date for 5 days beforehand the start and the deadline for offer date



Step 01

#### Basque Country rosado 2022 | 359-137

#### General tender details

Monopoly: Sweden (Systembolaget)

Assortment: Temporary listing (One-time Purchase)

Deadline written offer: December 6, 2022

Deadline Samples: December 29, 2022

Launch Date: May 12, 2023

#### Taste & Style description

Characteristics: We are looking for a pink, fresh wine with elements of red berries, citrus and herbs.

#### **Product Requirements**

Country of Origin: Spain

Type of Product: Rose wine

DO Getariako Txakolina, DO Bizkaiko Txakolina, DO Arabako Txakolin (Alavá) DO Region (Classification):

Getariako Txakolina, DO Bizkaiko Txakolina, DO Arabako Txakolin (Alavá)

2022 Vintage:

Ex. Cellar Price: 3,3 - 4,8 € per 750 ml Glass bottle

Minimum Volume: 5000 (Volume Unit 750 ml Glass bottle)

Type of Container: Glass bottle

Container Size: 750 ml

1. Only one offer per producer will be accepted for this reference

2. For this tender Systembolaget will prefer wines with high international brand recognition and a very good track record with international awards. A good track record means, about 90+ points from Decanter / Parker / WS / WE. For this tender Systembolaget will prefer wines with high international brand recognition and a very good track record with international awards. A good track record means, about 90+ points from Decanter / Parker / WS / WE.

Other Requirements:

Apply for this Tender Submit interest request Tender Form **Contact Details** Username E-mail \* mareike.appel@mail.hs-gm.de mareike.appel@mail.hs-gm.de State your email. We will use this email when we communicate about this offer. Your role or organization you represent \* O Producer O Agent / Intermediate Please explain your role for this offer. Are you or the organization you represent the actual supplier please state Producer, if not state Agent/Intermediate. First Name \* Last Name \* Company / Winery / Brewery \* Your first name State your surname/last name. Please state the name of your Company or (Calle/Federico/Emma/Ebba). Agency, or of your Winery, Brewery, Distillery Street Address \* Zip Code \* City \* Country \* Cellphone \* Website Select Country State your cellphone number. We will use Please select your Company's country. this telephone number when we Please note that if you are an Agent / communicate about this offer. Intermediate you will be asked also about the Producer's Country.

Save and Continue Later

Read about Concealed Wines Code of conduct & CSR Standard here.

### **Useful Links**

- <u>Current Tenders Overview and specification of</u>
   <u>tenders Systembolaget / ALKO / Vinmonopolet</u>
- Updated sales figures and statistics Systembolaget
- Systembolaget English page
- Systembolaget launch plan documents
- Systembolaget Launchplan documents
- Concealed Wines Linkedin group to get frequent updates about Swedish market and Systembolaget / ALKO / Vinmonopolet.

## CONCEALED WINES

