

CONCEALED WINES

UNIQUE WINES FROM GREAT PRODUCERS

Differences in monopoly markets; Sweden, Finland & Norway

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2023-02-28

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



A background image showing a dense crowd of people, represented by simple human silhouettes. Most silhouettes are dark, but one silhouette on the left side is highlighted in white, standing out from the rest of the crowd. The overall scene is dimly lit, with some warm, golden light filtering through the crowd.

Which wine sells best in each
market?

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
	<i>Local currency</i>	<i>EUR</i>	<i>Local currency</i>	<i>EUR</i>	<i>EUR</i>
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
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%
Monopoly markup	14,70%	22%	54%
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

Specification of the tender

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: -

Specification of the tender

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.

Specification of the tender

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.

Appearance of the product

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

Specification of the tender

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, several 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)
- Vinmonopolet 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 appearance 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 participants

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 participants

A background image showing a large crowd of people, represented by stylized human figures. Most figures are dark, but one figure on the left side is highlighted in white, standing out from the rest of the crowd. The overall scene is dimly lit, with a dark, moody atmosphere.

Producer Advice

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.

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Q&A

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!

No	Question	Answer
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.

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.

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Extra material section

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 (norwegian):

<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

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

Vinmonopolet

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

Alko

Finland		Finland	
Red Wines	Sales in 2022	White wines	Sales in 2022
Chile	4 475 000	Chile	4 802 000
Italy	4 383 000	Germany	4 701 000
Spain	3 337 000	Italy	2 554 000
Portugal	3 179 000	South Africa	2 141 000
Australia	2 261 000	Spain	1 678 000
France	892 000	France	1 265 000
Argentina	634 000	Australia	1 168 000
South Africa	567 000	Hungary	705 000
United Africa	545 000	Portugal	466 000



Concealed Wines Website

www.concealedwines.com



CONCEALED WINES
UNIQUE WINES FROM GREAT PRODUCERS

About Us ▾ Activities ▾ Opportunities ▾ Contact Us International ▾ Client area    

UNIQUE WINES FROM GREAT PRODUCERS

An importer of wine, beer and spirits covering Sweden, Finland and Norway

Systembolaget, ALKO & Vinmonpolet + HORECA

Business Opportunities
Current tenders
Search Tenders
Archive of Past Tenders
Questions & Answers

Calle Nilsson

Email:

calle.nilsson@concealedwines.com

(Skype ID: callenil)

Sign Up – Access 100% tender details

[Get registered – No cost](#)



France 1055

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

[See tenders](#)



Spain 587

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

[See tenders](#)



Italy 741

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

[See tenders](#)



Germany 472

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

[See tenders](#)



Portugal 308

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

[See tenders](#)



Austria 178

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

[See tenders](#)

100 % Turbiana from Lugana – 202305016 ★

Region:	DOP Lugana	Price:	3 - 5,5
Grapes:	100% Turbiana	Volume:	4,000
Country:	Italy	Deadline:	December 20, 2022
Vintage:	2022		
Product Type:	White wine		

[More Details](#)

Rosé wine from Riviera del Garda Classico – 202305017 ★

Region:	DOP Riviera del Garda Classico	Price:	3-7
Grapes:	100% Groppello, Barbera, Marzemino and Sangiovese	Volume:	2,400
Country:	Italy	Deadline:	December 20, 2022
Vintage:	2022		
Product Type:	Rose wine		

[More Details](#)

Rosé wine from Coste della Sesia – 202305018 ★

Region:	DOP Coste della Sesia	Price:	5,5 - 9
Country:	Italy	Volume:	1,400
Vintage:	2022	Deadline:	December 20, 2022
Product Type:	Rose wine		

[More Details](#)

Client Area

Sign up for free to get personalized updates and access to online submission

Required Vendor Profile Details

** indicotes required fields

Required User Contact Details

Name *

First

Company / Winery / Brewery *

Email

Country *

Last

Website

Your Role *

- Producer
 Agent / Intermediate

Telephone *

Update



Submit and monitor tender offers

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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 opposite 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.

Subscribe Tender Form

Product Country Market

You Have Successfully Subscribed to the Newsletter!


















Your Subscriptions

Product: Wine Country: Germany Region: Rheinhessen Market: All

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

Total tenders found: 2

Albariño from Rias Baixas 2022 – 305-19			
 Region:	DO Rias Baixas	 Price:	3,2 - 3,9
 Grapes:	100 % albariño	 Volume:	53335
 Country:	Spain	 Deadline:	December 12, 2022
 Vintage:	2022		
 Product Type:	White wine		
More Details			
Basque Country rosado 2022 – 359-137			
 Region:	DO Getariako Txakolina, DO Bizkaiko Txakolina, DO Arabako Txakolin (Alavá) DO Getariako Txakolina, DO Bizkaiko Txakolina, DO Arabako Txakolin (Alavá)	 Price:	3,3 - 4,8
 Country:	Spain	 Volume:	5000
 Vintage:	2022	 Deadline:	December 6, 2022
 Product Type:	Rose wine		
More Details			

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.
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Product Requirements

Country of Origin:	Spain
Type of Product:	Rose wine
Region (Classification):	DO Getariako Txakolina, DO Bizkaiko Txakolina, DO Arabako Txakolin (Alavá) DO Getariako Txakolina, DO Bizkaiko Txakolina, DO Arabako Txakolin (Alavá)
Vintage:	2022
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
Other Requirements:	<ol style="list-style-type: none"> 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.

Read about Concealed Wines Code of conduct & CSR Standard [here](#).

Apply for this Tender

Submit interest request

Tender Form

Step 01

Contact Details

Username

mareike.appel@mail.hs-gm.de

E-mail *

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 *

- Producer
- 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 *

Your first name
(Calle/Federico/Emma/Ebba).

Last Name *

State your surname/last name.

Company / Winery / Brewery *

Please state the name of your Company or Agency, or of your Winery, Brewery, Distillery

Street Address *

City *

Zip Code *

Country *

Select Country

Please select your Company's country. Please note that if you are an Agent / Intermediate you will be asked also about the Producer's Country.

Cellphone *

State your cellphone number. We will use this telephone number when we communicate about this offer.

Website

Next

[Save and Continue Later](#)

Useful Links

- [Current Tenders - Overview and specification of tenders Systembolaget / ALKO / Vinmonopolet](#)
- [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.](#)

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Thank you!

Contact details:

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