

Systembolagets Purchases

2014 to April 2024

CONCEALEDWINES
UNIQUE WINES FROM GREAT PRODUCERS

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Please note all Graphs are created manually with data Concealed Wines as importer access based on previous tender calls.

Introduction

We have compiled data from the archives of Systembolaget and ourselves for the last 10 years. Focussing on the products that were convincing in the selection process and were therefore purchased by the monopoly. Therefore, the following summary is exclusively for launched products, as well as from the perspective of an importer.

Although the monopoly is publishing fairly detailed wishes in their tenders, they not always buy only one product. Notice however that in very most cases one tender results in one product purchase.

Therefore we have focused on the products purchased. This way we include all products the monopoly has worked with.

The System

In 2019 Systembolaget has adjusted their product categories, leaving the old system without much differentiation behind. Since the change, all purchases are categorised according to the form in which the product is to be listed. Below is a brief overview of the categories included to this report:

FSN - longer listings of at least 9 months with purchase of the product as required

TSV - one-off purchases of the product, the listing only lasts as long, as stocks last

TSS - the purchase of seasonal products, as these are also one-off purchases, they are included in TSV for simplicity's sake

Overview

Firstly, we would like to provide an overview of the period from 2014 to April 2024.

A total of 4236 purchases were made. And despite fluctuations, a slight increase can be seen over the entire period.

However, it is important to note the changeover from an old to the current categorisation of the product range in 2019. The jump of almost 200 more purchases at this point should therefore be viewed critically and cannot be clearly attributed to the development of the market.

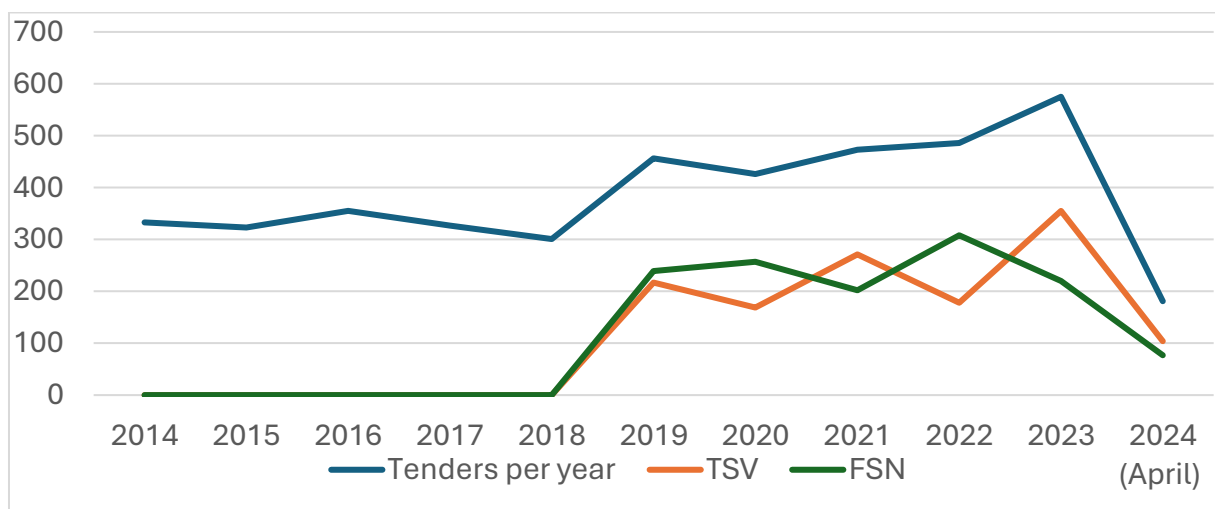


Figure 1 Purchases per year

In order to get a better overview of the development, the years by product type are listed below. Here, strong fluctuations in beer purchases are noticeable, while wines in particular remain quite stable as the second big category. It is also noticeable that beer, spirit and cider, as well as the other products (glögg, mixed drinks, etc.) have not increased as much as beer and wine.

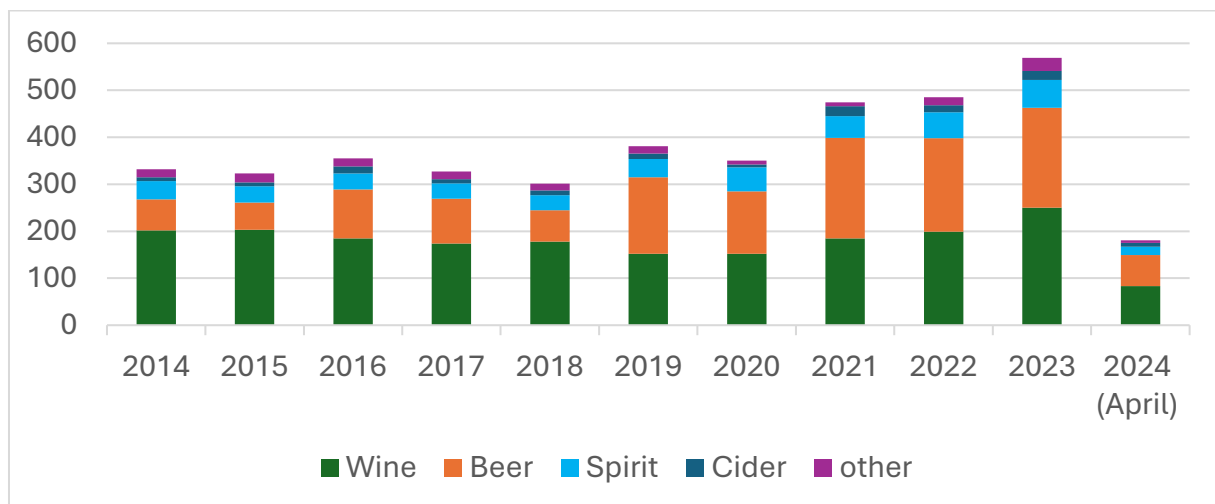


Figure 2 Product Types per year

A closer look

If we take a closer look at the product types, as in the example for 2023, the volume ratio is once again clear. It is easy to see that wine and beer account for slightly more than ¾ of all purchases and that the numbers of the wine category also can be applied for the entire 10-year period.

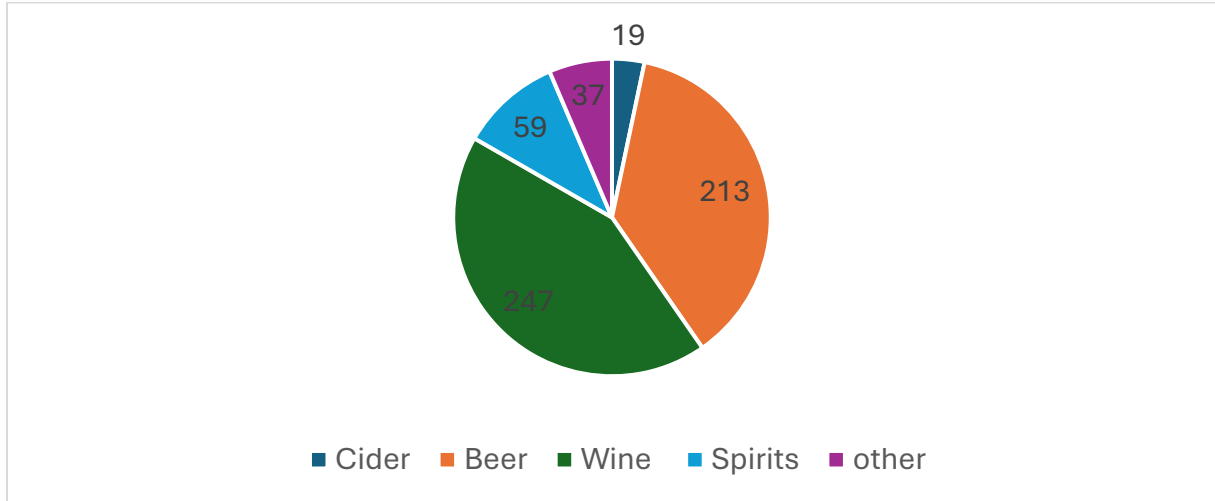


Figure 3 Product Types in 2023

In terms of the styles of wines purchased, red wines account for just under half. White wines are in second place, closely followed by sparkling wines. Fortified wines experience the most fluctuations over the years and the number of white wines is slowly increasing (at a slight expense of reds). Sparkling wines, on the other hand, remain at the same level in relation to all others.

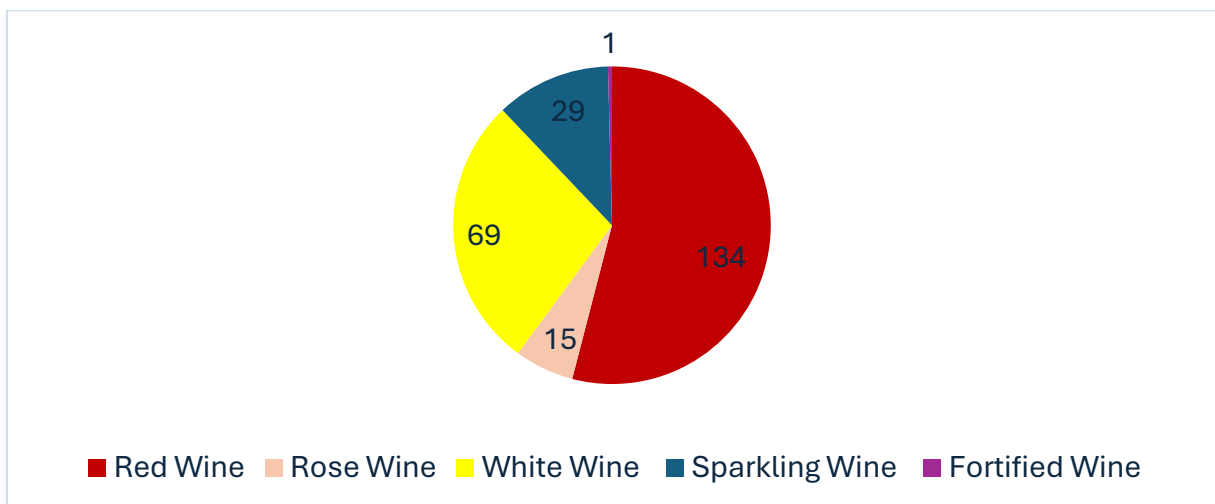


Figure 4 Wine Types in 2023

When it comes to the origin of the wines, it quickly becomes clear that almost the entire world is represented. However, of the four most purchased countries, Italy, Spain and France are the most strongly represented countries and from Europe. Chile follows in fourth place with a clear lead.

Once again, red wine dominates in all countries.

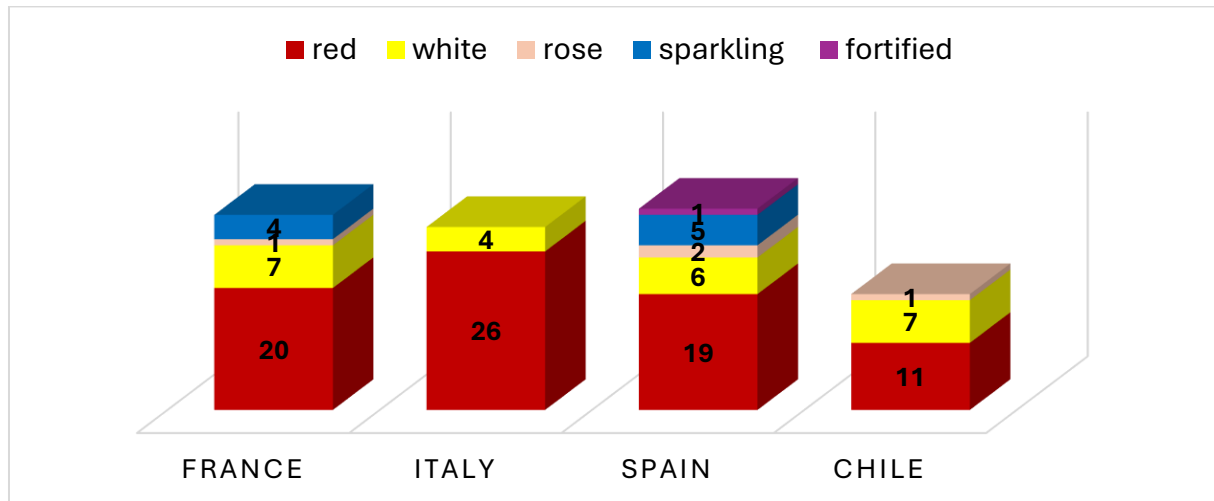


Figure 5 Wine Types per country 2023

The Competition

Depending on the level of detail and requirements of the tender, the number of samples that the monopoly tests varies. However, as we consider it important to get an idea of the competition to be expected, the following table shows some average values on how many samples were tasted.

The transition to the new categorisation must also be considered here, so the values are split up accordingly.

Product Type	2014-2024 (April)	2014-2018	2019-2024 (April)	2023
All	18.7	18.1	19.1	19.2
Beer	19.8	15.4	21.7	25.3
Cider	13.6	9.5	16.0	14.5
White Wine	18.7	19.3	18.4	13.9
Red Wine	21.2	22.1	20.4	19.8
Rose Wine	17.7	20.7	16.2	14.9
Sparkling Wine	16.1	23.5	13.1	11.9
Spirits	13.8	13.4	14.2	11.0
Others	14.2	10.3	17.7	18.2

Table 1 Average Competition

In addition to the competition, the points awarded are of course important. In the blind tasting, three professional testers try all the products and award 1-9 points each, so the maximum points are 27. How many points you get depends not only on good taste, but also on how well you fulfil what the monopoly is looking for. So how well does my product have to perform to beat the others?

This is shown in the following table with the average points of the winners, split up the same way as above.

Product Type	2014-2024 (April)	2014-2018	2019-2024 (April)	2023
All	21.2	20.8	22.1	22.6
Beer	20.6	21.8	21.7	22.3
Cider	19.9	19.2	22.5	24.0
White Wine	21.6	20.9	22.3	23.1
Red Wine	22.0	21.6	22.4	22.7
Rose Wine	21.6	21.5	21.9	22.4
Sparkling Wine	22.1	20.6	23.0	23.1
Spirits	22.3	21.7	22.8	23.6
Others	20.8	20.9	20.5	21.8

Table 2 Average Winning Points

Follow Up

We have tried to provide a quick and understandable overview of the topic and therefore refrained from analysing the years in more detail or going into individual developments in detail, except for 2023 as example.

However, as it is certainly of interest to our partners how individual tenders or products perform, we work on providing this data on our website.

Logged-in users will be able to search for archived tenders and view the winner, their score and the competition soon.

If you have any questions or are otherwise interested, please contact us using the options below:

Our website

www.concealedwines.com

General contact

Info@concealedwines.com Phone: +46 723 074 434

Calle Nilsson (Co-Founder)

calle.nilsson@concealedwines.com Phone +46 737 099 182