

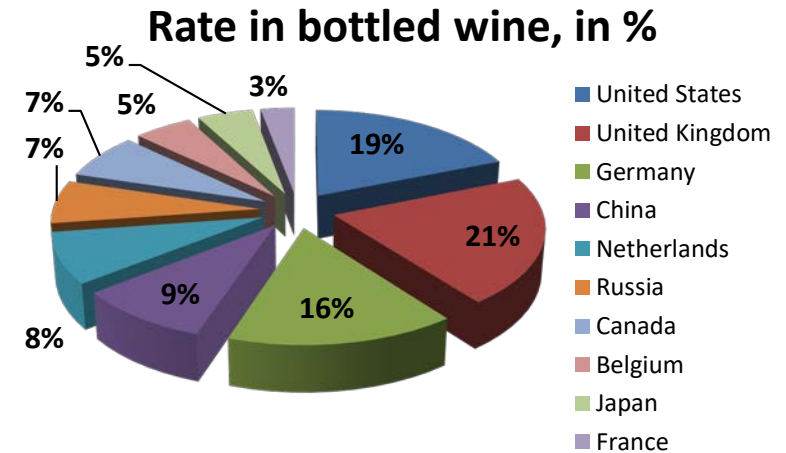
Analytics – IWSR 2015



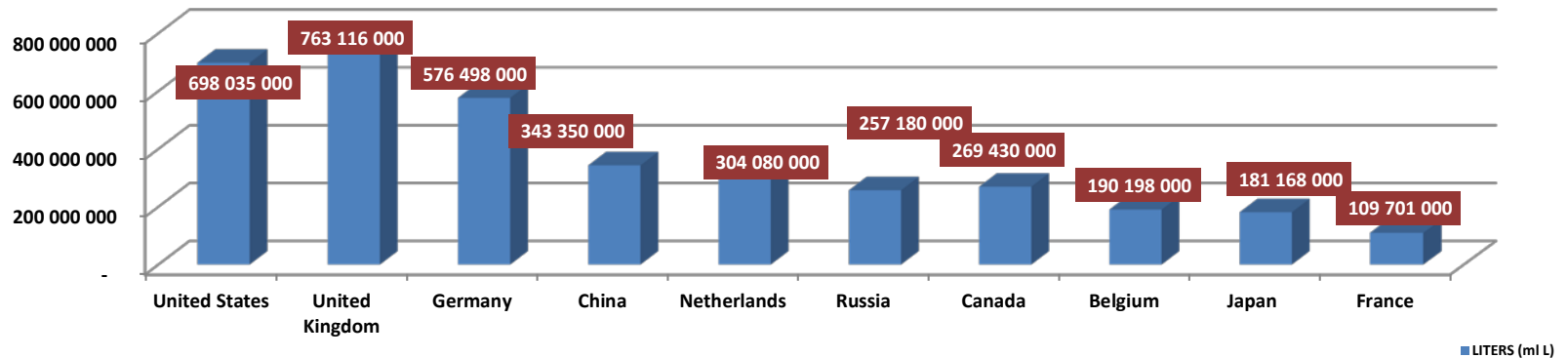
**WINE&SPIRITS
DISTRIBUTION**

Main wine importers in bottled wine

Rates	COUNTRY	LITERS (ml L)	share, %
1	United States	698 035 000	18,903%
2	United Kingdom	763 116 000	20,665%
3	Germany	576 498 000	15,612%
4	China	343 350 000	9,298%
5	Netherlands	304 080 000	8,235%
6	Russia	257 180 000	6,964%
7	Canada	269 430 000	7,296%
8	Belgium	190 198 000	5,151%
9	Japan	181 168 000	4,906%
10	France	109 701 000	2,971%
	Total	3 692 756 000	100%

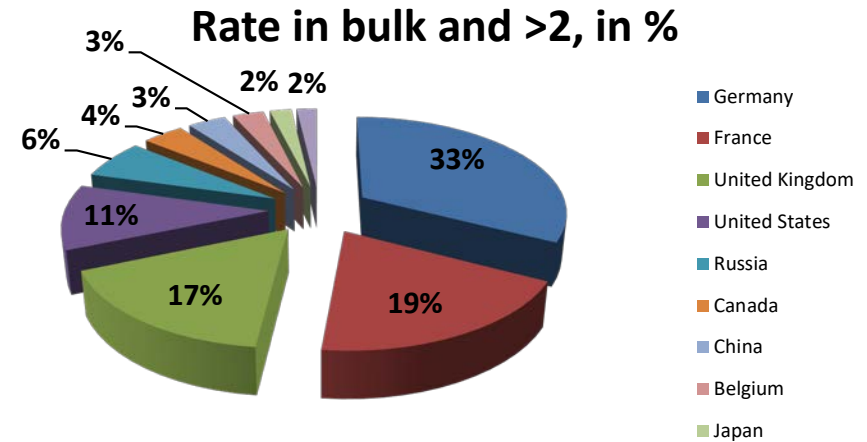


RATE IN BOTTLED WINE, ml L

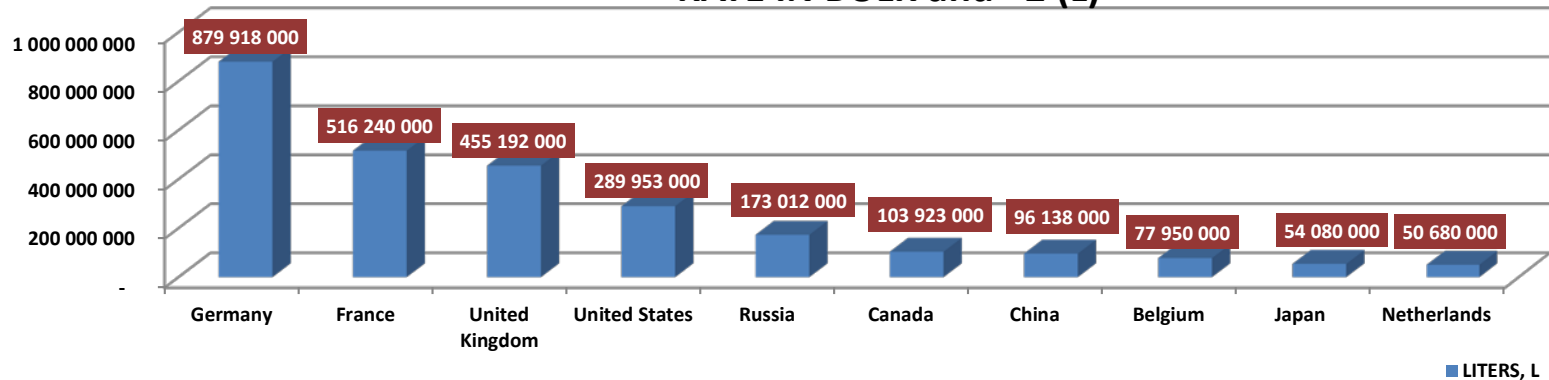


Main wine importers in bulk wine

RATES	COUNTRY	LITERS, L	share, %
1	Germany	879 918 000	33%
2	France	516 240 000	19%
3	United Kingdom	455 192 000	17%
4	United States	289 953 000	11%
5	Russia	173 012 000	6%
6	Canada	103 923 000	4%
7	China	96 138 000	4%
8	Belgium	77 950 000	3%
9	Japan	54 080 000	2%
10	Netherlands	50 680 000	2%
	Total	2 697 086 000	100%

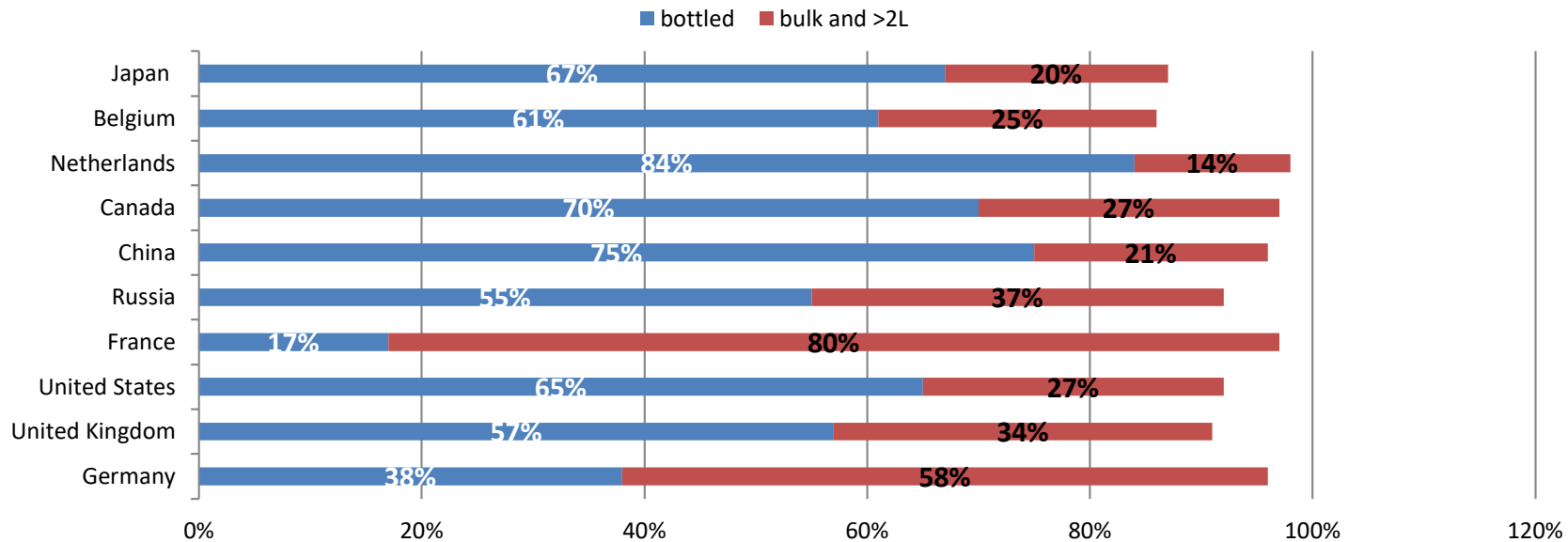


RATE IN BULK and >2 (L)



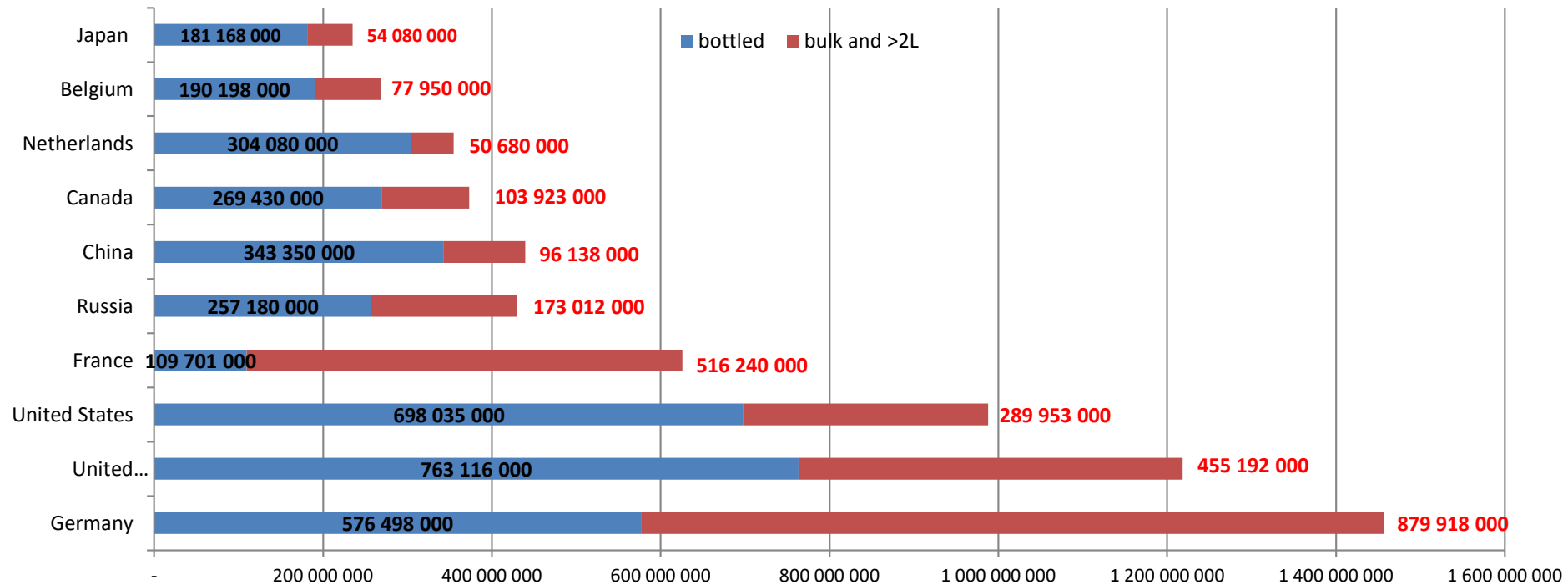
Main wine importers in bulk & bottled wine

Type	Germany	United Kingdom	United States	France	Russia	China	Canada	Netherlands	Belgium	Japan
bottled	38%	57%	65%	17%	55%	75%	70%	84%	61%	67%
bulk and >2L	58%	34%	27%	80%	37%	21%	27%	14%	25%	20%



Main wine importers in bulk & bottled wine

Type,L	Germany	United Kingdom	United States	France	Russia	China	Canada	Netherlands	Belgium	Japan
bottled	576 498 000	763 116 000	698 035 000	109 701 000	257 180 000	343 350 000	269 430 000	304 080 000	190 198 000	181 168 000
bulk and >2L	879 918 000	455 192 000	289 953 000	516 240 000	173 012 000	96 138 000	103 923 000	50 680 000	77 950 000	54 080 000



China

Import wine consumption

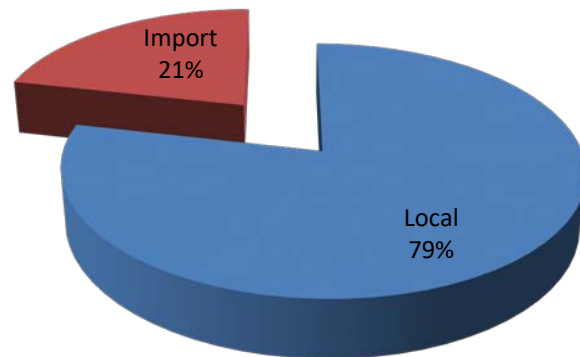
80/20

French	121 500 000	44,9%	79,7%
Australia	35 100 000	13,0%	
Spanish	31 500 000	11,6%	
Chilean	27 900 000	10,3%	
Italian	18 270 000	6,7%	
US	11 700 000	4,3%	
South Afr	4 455 000	1,6%	
Argentini	4 230 000	1,6%	20,3%
Portugue	4 500 000	1,7%	
German	3 240 000	1,2%	
Other	8 505 000	3,1%	
Total	270 900 000	100,0%	

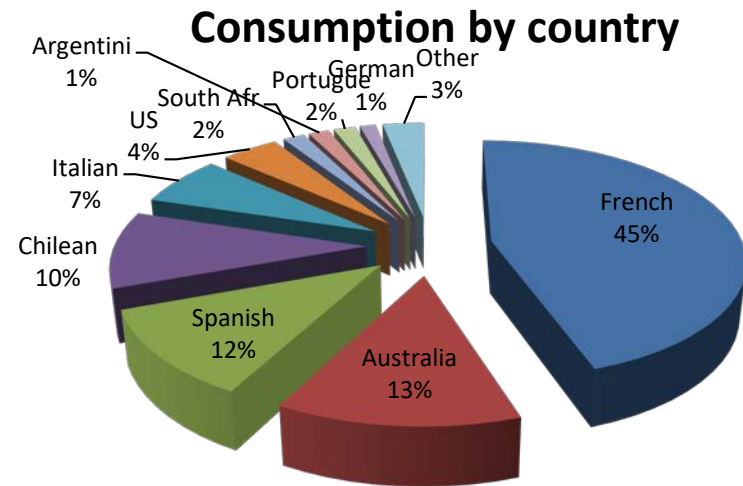
KPIs

Population	1 500 000 000
GDP, USD/capita	6 569
Consumption l/capita	0,8

Still light wine consumption



Total 1 260 900 000



Japan

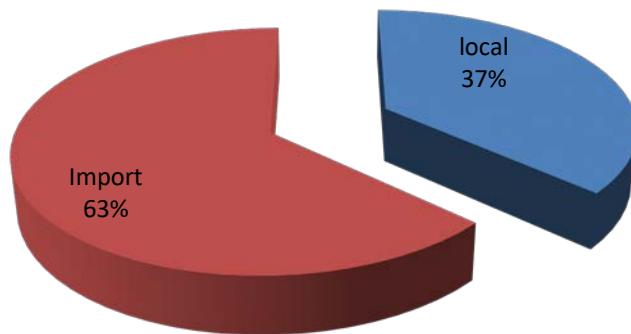
Import wine consumption

France	56 690 000	31,5%	83,1%
Chile	36 440 000	20,2%	
Italy	33 270 000	18,5%	
Spain	23 400 000	13,0%	
USA	11 550 000	6,4%	16,9%
Australia	6 840 000	3,8%	
Germany	3 320 000	1,8%	
Argentina	3 090 000	1,7%	
South Africa	2 260 000	1,3%	
New Zerland	1 120 000	0,6%	
Others	2 190 000	1,2%	
Total	180 170 000	100,0%	

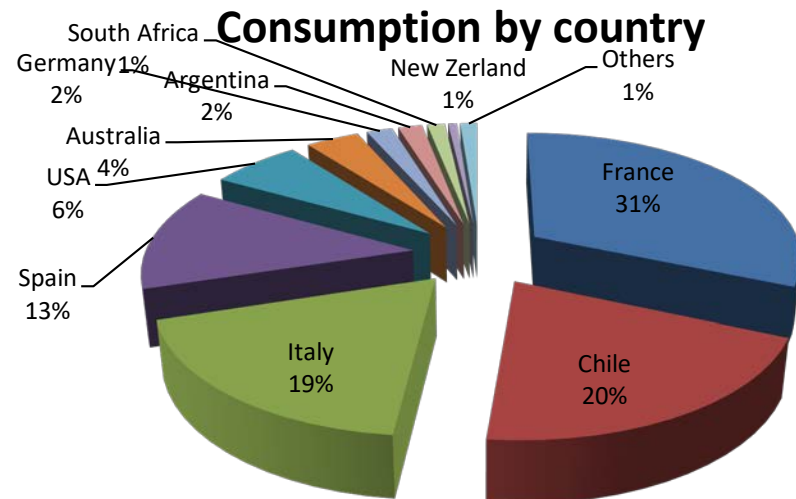
KPIs

Population	127 104 000
GDP, USD/capita	42 325
Consumption l/capita	2,2

Still light wine consumption



Total 284 530 000



Vietnam

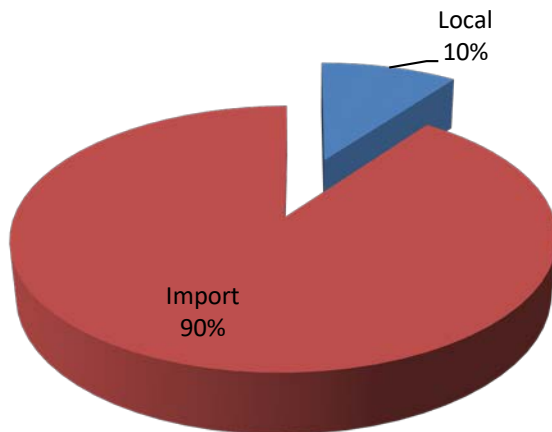
Import wine consumption

Chilean	310	2 790 000	24,6%	88,8%
French	295	2 655 000	23,4%	
International	175	1 575 000	13,9%	
Australian	149	1 341 000	11,8%	
US	95	855 000	7,5%	
Italian	95	855 000	7,5%	
South African	49	441 000	3,9%	11,2%
Argentinian	32	288 000	2,5%	
Spanish	26	234 000	2,1%	
German	21	189 000	1,7%	
Portuguese	7	63 000	0,6%	
New Zealand	5,75	51 750	0,5%	
		11 337 750	100,0%	

KPIs

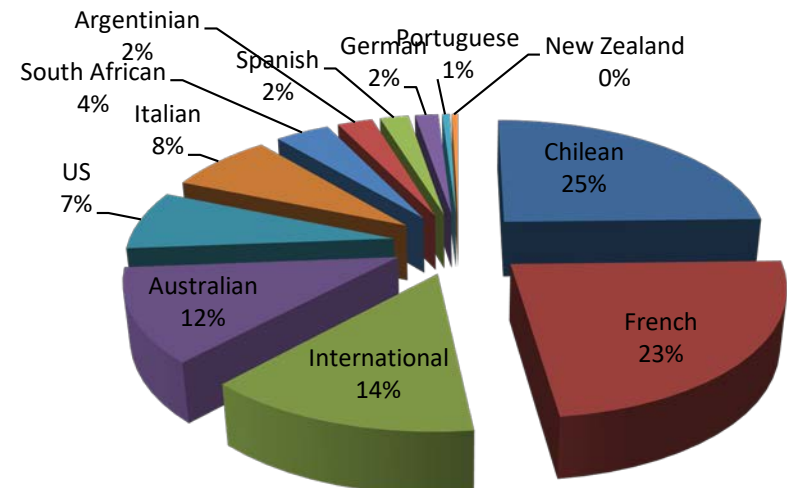
Population	92 477 000
GDP, USD/capita	3 100
Consumption l/capita	0,14

Still light wine consumption



Total 12 597 750

Consumption by country



Thailand

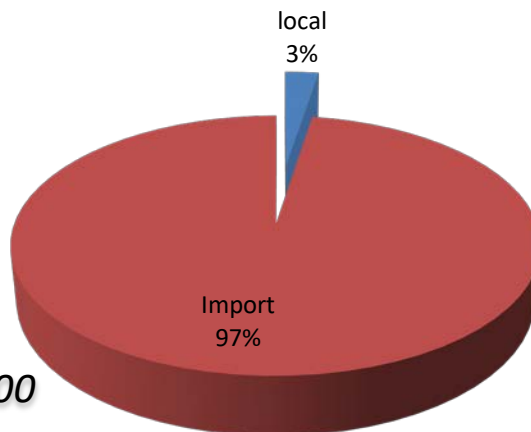
Import wine consumption

Australian	3 357 000	24,1%	83,3%
South African	2 556 000	18,3%	
Italian	2 119 500	15,2%	
Chilean	1 863 000	13,4%	
French	1 728 000	12,4%	
US	1 125 000	8,1%	
International	576 000	4,1%	
Argentinian	216 000	1,5%	
Spanish	157 500	1,1%	16,7%
New Zealand	153 000	1,1%	
German	63 000	0,5%	
Portuguese	40 500	0,3%	
Total	13 954 500	100,0%	

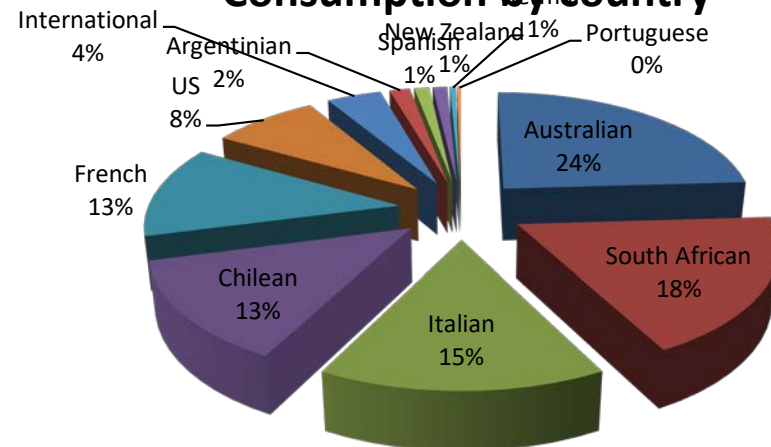
KPIs

Population	70 498 494
GDP, USD/capita	5 779
Consumption l/capita	0,2

Still light wine consumption



Consumption by country



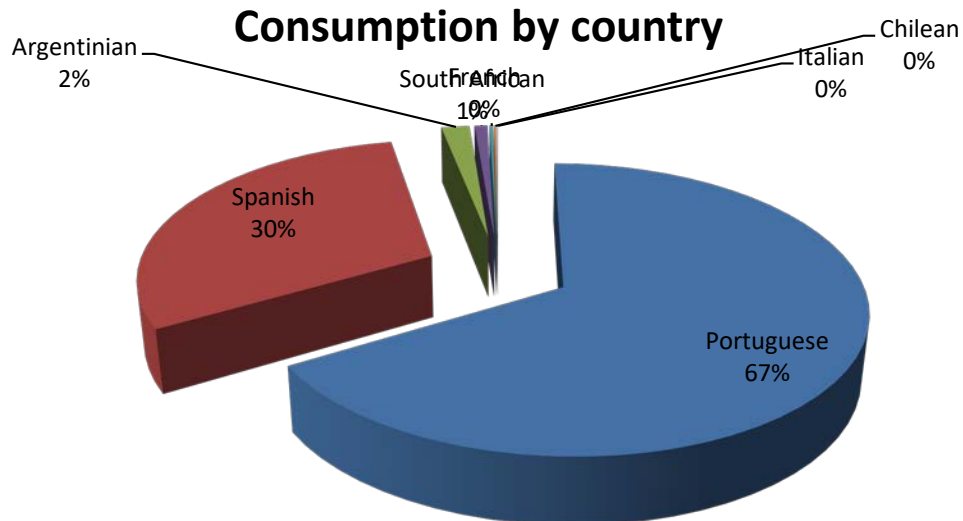
Angola

Import wine consumption

Portuguese	62 833 500	66,5%	96,9%
Spanish	28 685 250	30,4%	
Argentinian	1 719 000	1,8%	
South African	785 250	0,8%	
French	216 000	0,2%	
Chilean	162 000	0,2%	
Italian	63 000	0,1%	3,1%
International	13 500	0,0%	
US	11 250	0,0%	
German	2 250	0,0%	
Greek	2 250	0,0%	
Total	94 493 250	100,0%	

KPIs

Population	24 383 000
GDP, USD/capita	6 251
Consumption l/capita	3,9



Nigeria

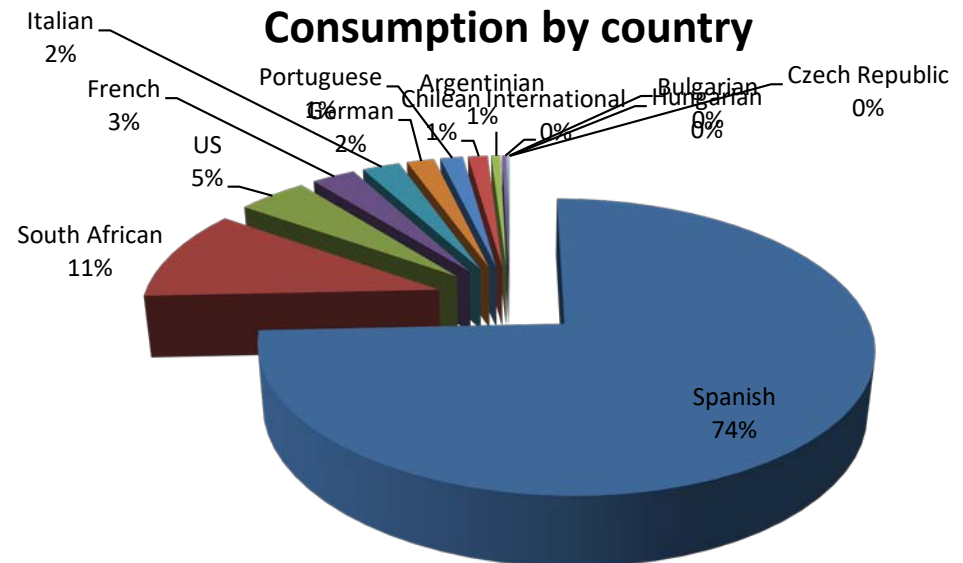
Import wine consumption

Spanish	22 410 000	74,3%	84,8%
South African	3 174 750	10,5%	
US	1 352 250	4,5%	
French	843 750	2,8%	
Italian	731 250	2,4%	
German	535 500	1,8%	
Portuguese	438 750	1,5%	
Chilean	380 250	1,3%	
Argentinian	175 500	0,6%	
International	90 000	0,3%	
Bulgarian	27 000	0,1%	
Hungarian	4 500	0,0%	
Czech Republic	2 250	0,0%	
Total	30 165 750	100,0%	

KPIs

Population	174 507 000
GDP, USD/capita	2 582
Consumption l/capita	0,2

15,2%



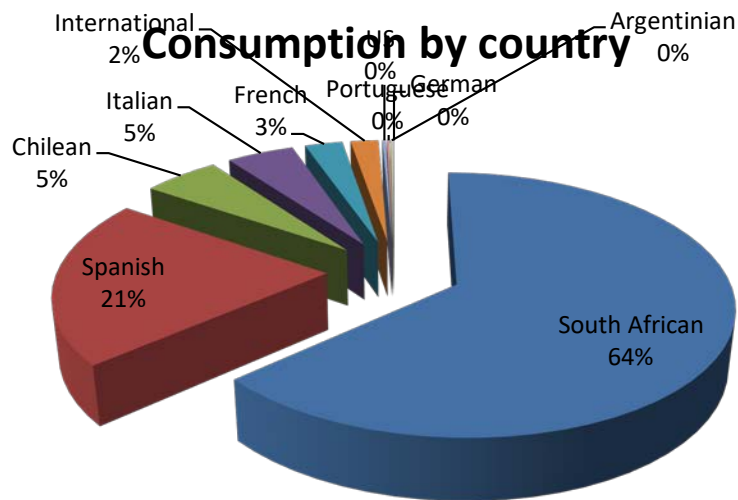
Tanzania, Uganda, Kenya

Import wine consumption

South African	7 182 000	63,5%	84,5%
Spanish	2 369 250	21,0%	
Chilean	609 750	5,4%	15,5%
Italian	537 750	4,8%	
French	301 500	2,7%	
International	222 750	2,0%	
US	29 250	0,3%	
Portuguese	22 500	0,2%	
Argentinian	20 250	0,2%	
German	6 750	0,1%	
Total	11 301 750	100,0%	

KPIs

Population	127 059 000
GDP, USD/capita	1 100
Consumption l/capita	0,1



Kazakhstan

Население – 17,2 млн. чел.

Объем рынка – 25,7 млн. л

Импорт – 69% = 17,7 млн. л

Потребление вина на взрослого человека – 1,7 л./год

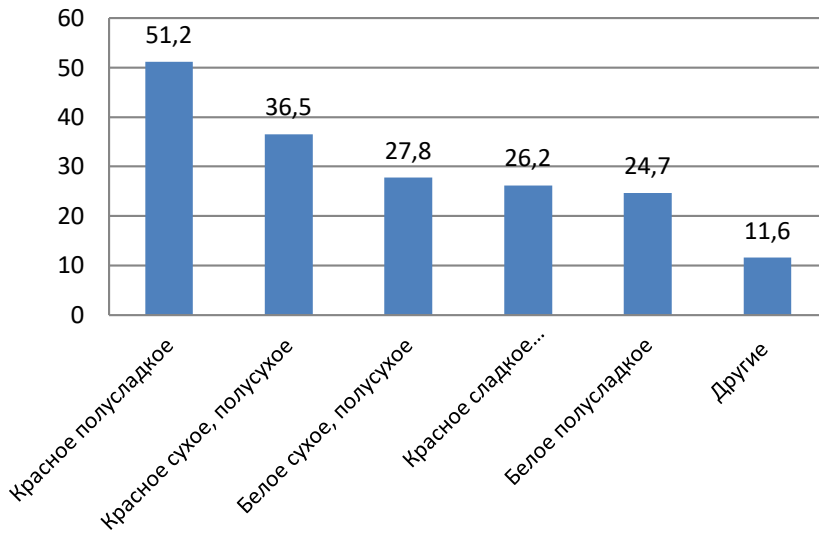
Возможности

- Сильно развит импорт
- Тенденция переключения с крепких напитков на более легкие

Угрозы

- Половину импорта занимают Молдавские марки
- На втором месте вина Грузии
- Этим маркам идет поддержка со стороны государства

Потребление типов вина, %



Лояльность к бренду

- 12,3% покупателей приверженцы одного бренда
- 48,9% покупателей берут 2-3 определенные марки
- 34,6% покупателей берут любое вино

Соотношение покупателей цена - качество, %

- 74,7% покупателей выбирают качество
- 20,8% ориентируются на цену

Costa Rica

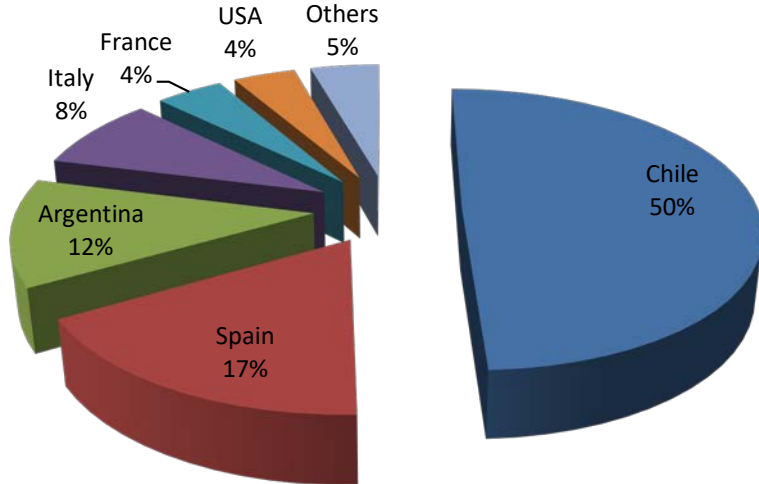
Import wine consumption

Chile	4 572 464	49,4%	87,3%
Spain	1 601 288	17,3%	
Argentina	1 134 786	12,3%	
Italy	768 248	8,3%	
France	400 785	4,3%	
USA	370 240	4,0%	12,7%
Others	408 190	4,4%	
Total	9 256 000	100,0%	

KPIs

Population	4 825 000
GDP, USD/capita	10 752
Consumption l/capita	1,9

Consumption by country



Вино Чили – лидер по импорту. Оно ввозится без налогов по соглашению о торговле между странами

Nicaragua

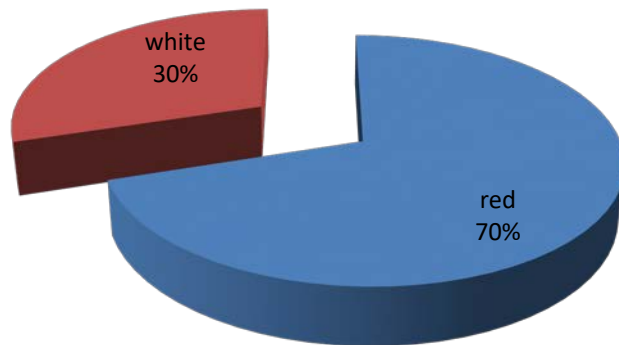
Import wine consumption

Chile	411 750	54,1%	86,4%
Argentina	168 750	22,2%	
Spain	76 500	10,1%	13,6%
USA	43 200	5,7%	
Italy	33 750	4,4%	
France	19 350	2,5%	
Others	7 200	0,9%	
Total	760 500	100,0%	

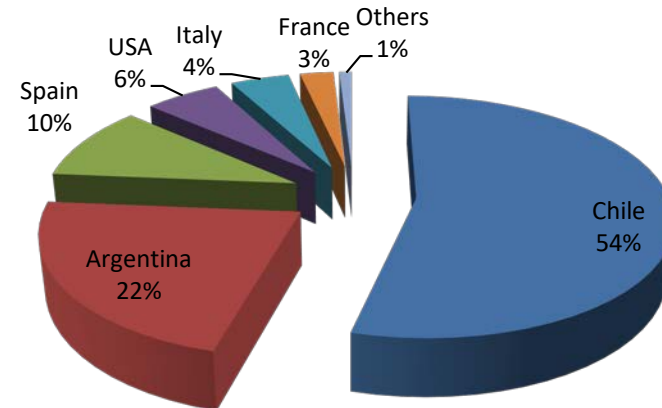
KPIs

Population	6 017 000
GDP, USD/capita	3 300
Consumption l/capita	0,1

Still light wine by type



Consumption by country



Countries by import of wine

Страны по импорту вина

Country	Consump 2013, liters	Import 2013, liters	Population
Russia	1 150 900 000	680 000 000	143 000 000
China	1 426 410 000	278 910 000	1 340 000 000
Japan	284 530 000	180 170 000	127 104 000
Angola	94 493 250	94 493 250	24 383 000
Nigeria	30 165 750	30 165 750	174 507 000
Ivory Coast	24 151 500	24 151 500	21 100 000
Kazakhstan	25 700 000	17 700 000	17 200 000
Ghana	14 287 500	14 287 500	24 300 000
Thailand	14 319 000	13 954 500	70 498 494
Namibia	11 301 750	11 301 750	2 358 000
Cameroon	9 956 700	9 956 700	20 549 000
Vietnam	10 968 750	9 753 750	92 477 000
Costa Rica	9 256 000	9 256 000	4 825 000
Mozambique	8 763 750	8 763 750	24 692 000
Kenya	7 591 500	7 591 500	44 038 000
Gabon	6 660 000	6 660 000	1 608 000
Togo	6 484 500	6 484 500	7 154 000
Equatorial Guinea	5 035 500	5 035 500	704 000
Senegal	4 963 500	4 963 500	13 300 000
Israel	36 522 000	4 122 000	8 252 500
Indonesia	3 629 250	3 629 250	253 610 000
Benin	3 298 500	3 298 500	9 740 000
Congo	3 215 250	3 215 250	77 434 000
Dubai	2 610 000	2 610 000	2 000 000
Tanzania	2 511 000	2 511 000	48 262 000
India	10 620 000	2 475 000	1 220 800 359
Mauritius	2 223 000	2 223 000	1 245 000
Qatar	1 530 000	1 530 000	1 904 900
Uganda	1 199 250	1 199 250	34 759 000
Abu Dhabi	985 500	985 500	921 000
Seychelles	985 500	985 500	90 000
South Africa	327 663 000	918 000	48 601 000
Morocco	32 807 250	857 250	32 649 000
Iraq	801 000	801 000	36 000 000
Nicaragua	760 500	760 500	6 017 000

Страны по употреблению вина

Country	Liters/capita
Seychelles	11,0
Russia	8,0
Equatorial Guinea	7,2
South Africa	6,7
Namibia	4,8
Israel	4,4
Gabon	4,1
Angola	3,9
Japan	2,2
Tunisia	2,1
Costa Rica	1,9
Mauritius	1,8
Kazakhstan	1,5
Dubai	1,3
Ivory Coast	1,1
Abu Dhabi	1,1
China	1,1
Morocco	1,0
Togo	0,9
Lebanon	0,8
Qatar	0,8
Ghana	0,6
Cameroon	0,5
Bahrain	0,5
Senegal	0,4
Mozambique	0,4
Benin	0,3
Thailand	0,2
Oman	0,2
Nigeria	0,2
Kenya	0,2
Jordan	0,1
Nicaragua	0,1
Vietnam	0,1
Laos	0,1