ProWein

Internationale Fachmesse
Weine und Spirituosen

Hochschule Geisenheim University

PROWEIN BUSINESS REPORT 2021

"Sustainability"

Prof. Dr. Simone Loose
Geisenheim University, Institute of Wine and Beverage Business Research

Background

What is the aim of the ProWein Business Report?

The wine sector is at the forefront of being exposed to the effects of climate change. At the same time society expects businesses to act sustainably.

How do wine businesses overcome these challenges simultaneously struggling with a pandemic?

In its fifth edition, the ProWein Business Report is therefore dedicated to two main questions:

1) What is the **current status of the wine sector** at the end of the pandemic?
2) Which specific **sustainability actions** is the wine industry already undertaking and how can certification programs contribute to improve sustainability?

The ProWein Business report taps into the knowledge of international wine producers, intermediaries, and wine marketers to answer these question. By combining and contrasting opinions from the complete value chain, it provides a unique economic market barometer.

ProWein and Geisenheim University established a long-term collaboration to provide the wine industry with annual insights on global wine market trends.

ProWein

Starting in 1994 ProWein in Dusseldorf / Germany has developed into what is the leading trade fair for the international wine and spirits industry today.

Once a year industry professionals from viticulture, production, trade and gastronomy, meet for three days of concentrated business and a highly educational ancillary program. International market leaders, importers and exporters, commercial agencies, select vintners and the growing regions from the big wine nations will be represented as well as exhibitors in the spirits segment

Since 2013, there have been regional satellite events of this successful concept all over the world. In the meantime this includes ProWine Shanghai, ProWine Hong Kong ProWine Singapore, ProWine Sao Paulo and ProWine Mumbai.

Geisenheim University

Celebrating its 150th anniversary, Geisenheim University today is one of the leading wine research and education centres in the world. It hosts more than 1,800 students studying various German and English bachelor and master degrees in viticulture and enology, international wine business and beverage technology among others. Since 2021 the new MBA for Management in the Wine Sector complements the course program.

Applied and fundamental research is at the heart of Geisenheim's research activities. Geisenheim University is well known for its extensive global research network and international collaborations.

Contents

Hochschule Geisenheim University

ProWein
Internationale Fachmesse Weine und Spirituosen

1. Who participated? 3
2. Threats and Challenges 8
3. Economic condition 12
4. Sustainability 17
5. Organic Certification 26
6. Sustainable Certification 37
7. Details of Method 50

Chapter 1

WHO PARTICIPATED?

Global report covering all players of the supply chain

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

Almost 3,000 experts shared their opinion

- Commissioned by ProWein for the fifth time, Geisenheim University has surveyed 2,880 experts in the wine industry from 48 countries

- The ProWein Business Report is unique because it assesses the state of the whole wine supply chain. It collects opinions from wine producers, exporters and importers as well as retailers, wine trade and gastronomy.

- The report confirms that producers and trade differ in the challenges they face towards the end of the pandemic. Producers and retailers also have different perspectives on the importance of climate change and sustainability.

- The ProWein Business Report confirms its role as the globally most comprehensive trend barometer of the international wine industry.

Participants

Online survey (n=2,880)
November 2021; 5 languages

Producers (n=1,219)

- **Small wineries** (n=952) (mainly use own grapes)
- **Cooperatives** (n=106)
- **Large wineries** (n=161) (mainly buy grapes or bulk wine)

Intermediaries (n=800)

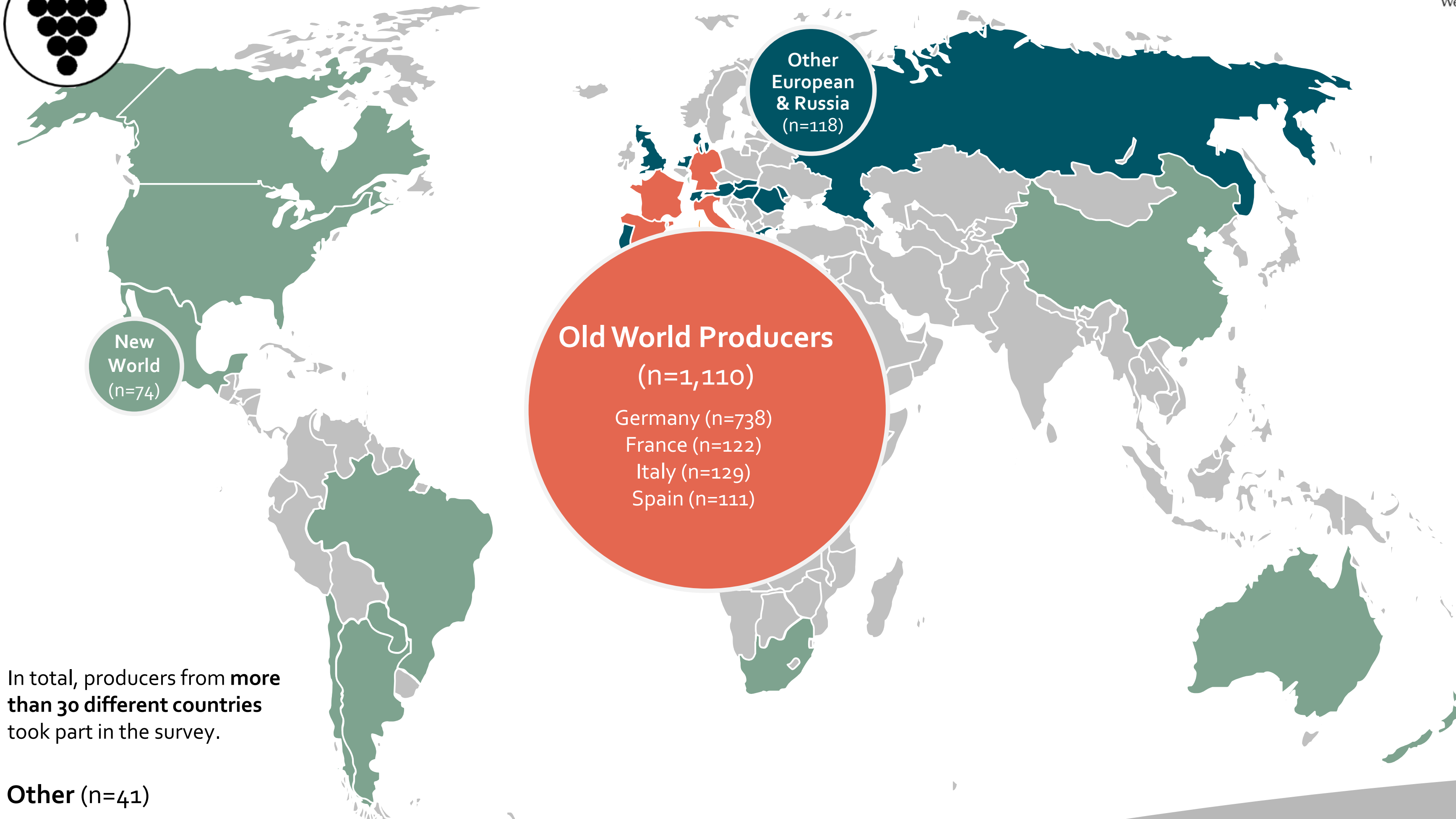
- **Exporters** (n=114)
- **Importers, Distributors** (n=686)

Retailers (n=861)

- **Wholesalers** (n=146)
- **Specialty retail** (n=462)
- **On-trade** (n=253)

For detailed information on methodology and participants, please see chapter 7.

Company location
Producers and Exporters

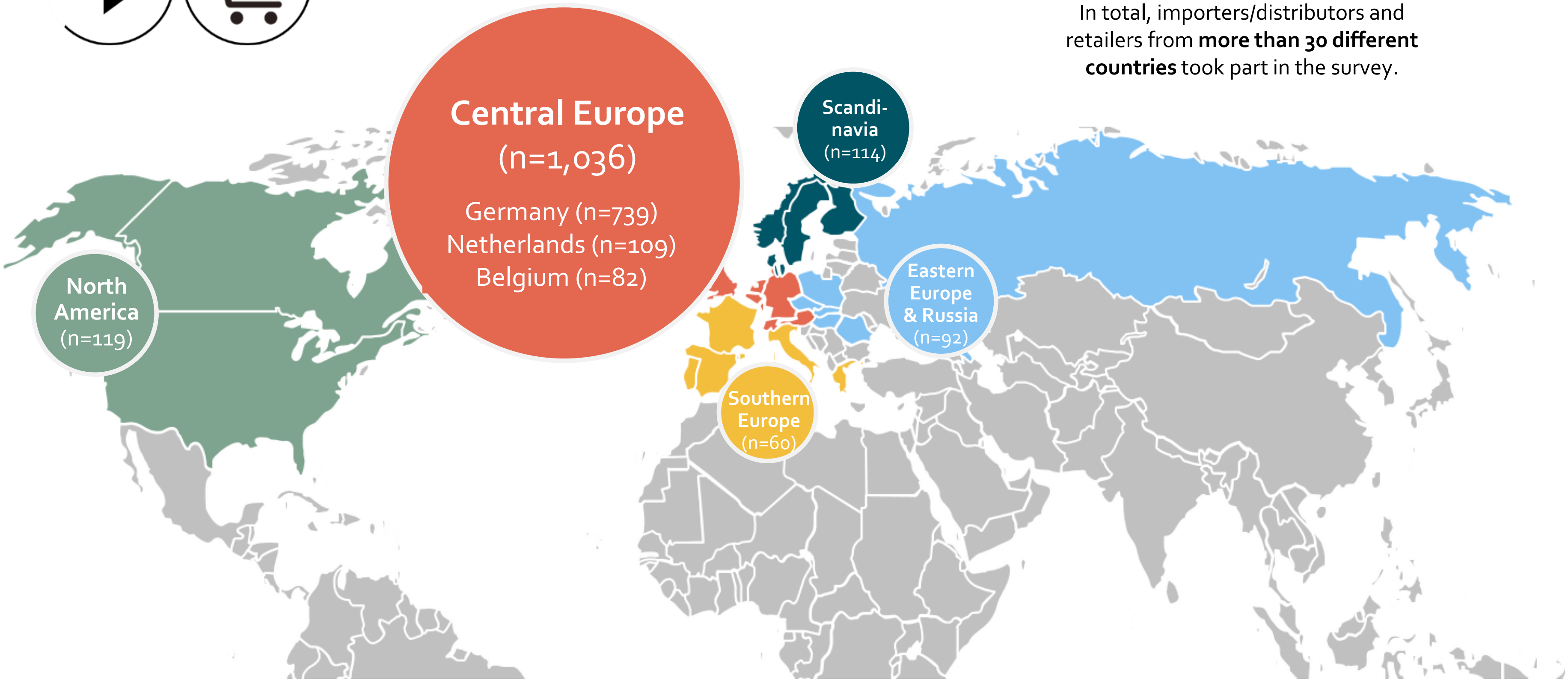


In total, producers from **more than 30 different countries** took part in the survey.

Other (n=41)

Company location
Importers and Retail

In total, importers/distributors and retailers from **more than 30 different countries** took part in the survey.



Other (n=126)

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

Chapter 2

Threats and Challenges

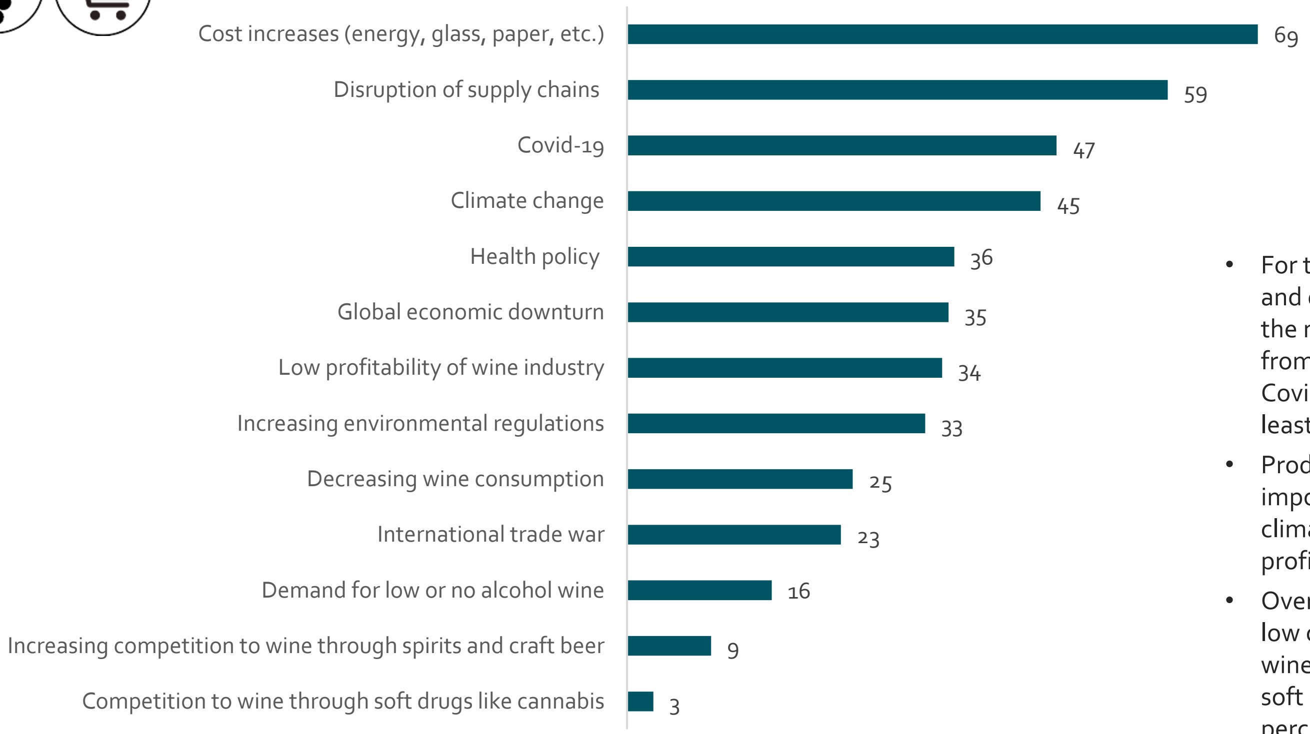
Threats and challenges for the wine industry

Hochschule Geisenheim University

ProWein
Internationale Fachmesse Weine und Spirituosen

What are the biggest threats and challenges for your company?

% who stated that the following threats and challenges to the wine industry will have a strong or very strong effect (all: n=2,880)



- For the wine sector overall, cost increases and disruptions of supply chains are currently the most important challenges. These result from the global economic recovery after Covid-19 and are expected to persist for at least 2022.
- Producers and trade differ in the relative importance of challenges such as Covid-19, climate change, health policy, low profitability and environmental regulations .
- Overall challenges through the demand for low or no alcohol wine and competition to wine through other alcoholic beverages and soft drugs like cannabis are currently perceived as low.

Top 10 threats and challenges Producers vs. Trade

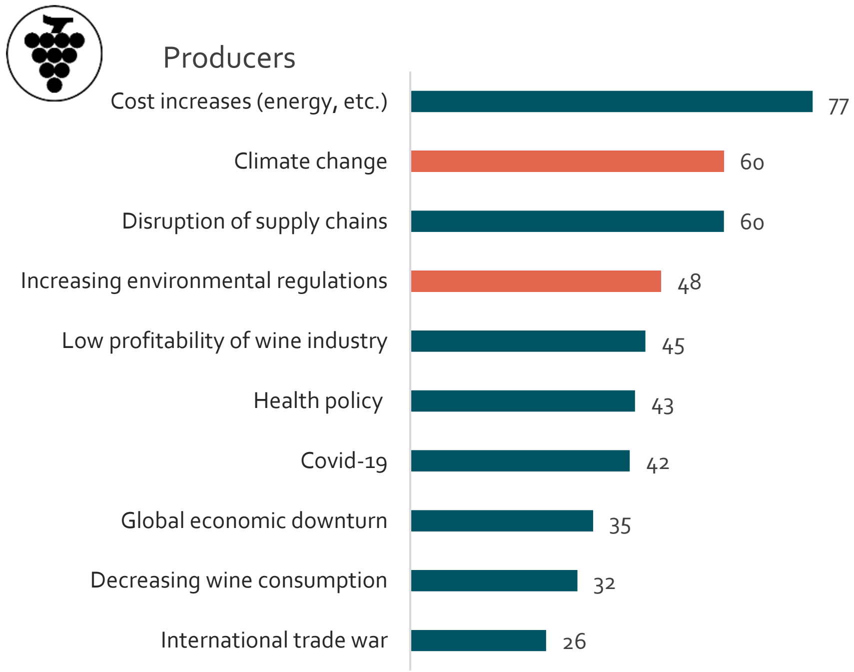
Hochschule Geisenheim University

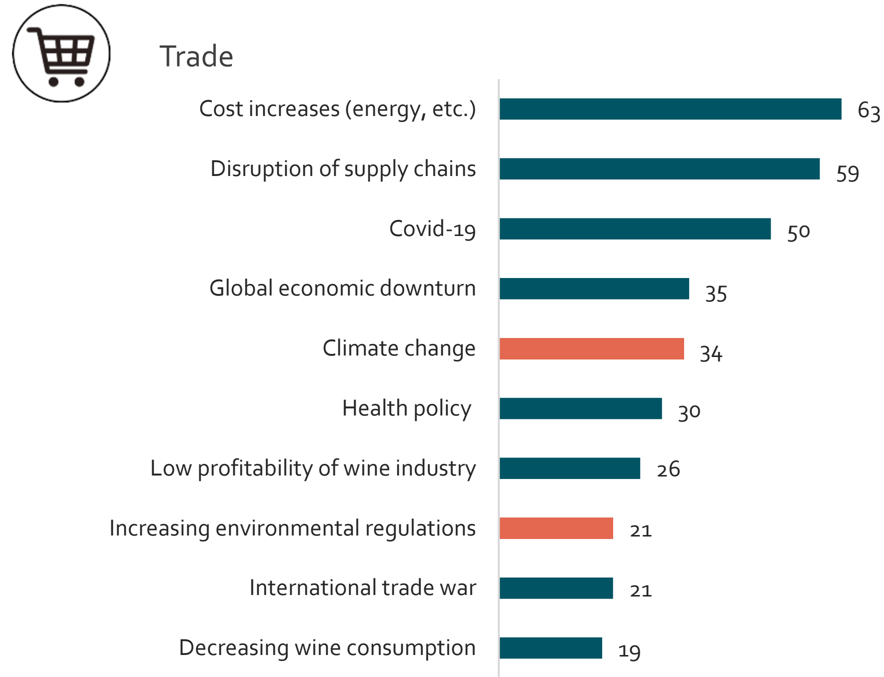
ProWein

Internationale Fachmesse Weine und Spirituosen

What are the biggest threats and challenges for your company?

% who stated that the following threats and challenges to the wine industry will have a strong or very strong effect





Producers

Overall, producers face a larger number of strong challenges compared to the wine trade.

Climate change is the second most important challenge to wine producers after rising cost. Increasing environmental regulations require investments, which are hindered by the sector's low profitability.

Trade

Covid-19 still results in trade restrictions for the on-premise sector and is the third most important challenge for wine trade after cost increases and disruptions of supply chains. Overall, wine trade perceives fewer strong challenges.

Statements and opinions

"Every year the ProWein Business Report captures the mood of wine industry. Two major issues concern the wine world at present, COVID-19 and climate change. Both challenges differ strongly in their dynamics. While we hope to get back to everyday life after the pandemic very soon, climate change requires long-term actions by all members of the value chain.

The ProWein Business Report demonstrates one thing very clearly: it's about so much more than just ecological viticulture. It's about taking further steps towards holistic sustainability. And collectively we are not a community at the mercy of a pandemic here, but instead very innovative and agile players driving forward an important development for the future."

Bastian Mingers

Project Director Wine & Spirits, Messe Düsseldorf / ProWein

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

Chapter 3

Economic Condition

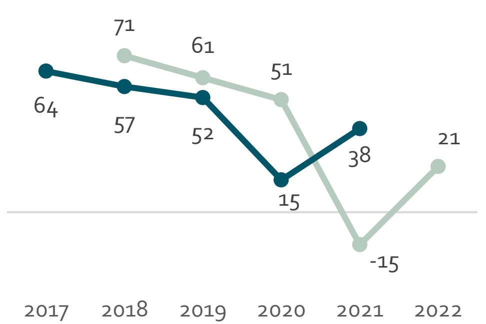
Economic condition

Current and future economic condition within the company

Saldo (positive minus negative opinions) for the current (now) and the future (in 12 months) economic condition within the company , 2017, 2018, 2019, 2020 and 2021 surveys results.

Actual condition   Expectation

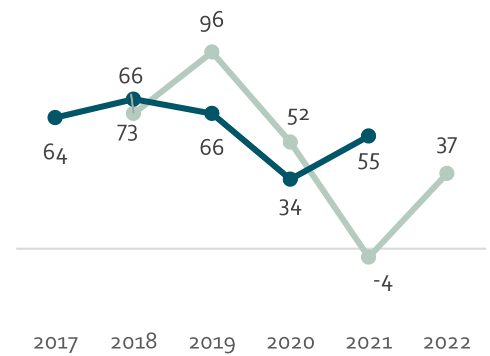
Small wineries



Actual condition improved, considerably better than expected.

Expectations for 2022 positive but slightly below current condition.

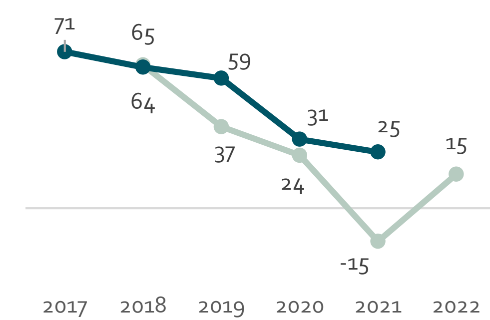
Large wineries



Actual condition improved and considerably better than expected.

Expectations for 2022 positive but slightly below current condition.

Cooperatives



Least positive condition and expectations of producers. Actual condition declined but better than expected.

Expectations for 2022 slightly below current condition.

Economic condition by country Producers

Hochschule Geisenheim University

ProWein

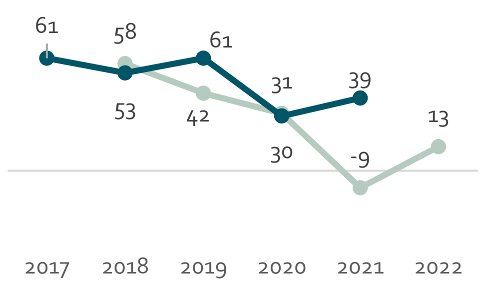
Internationale Fachmesse Weine und Spirituosen

Current and future economic condition within the company by country

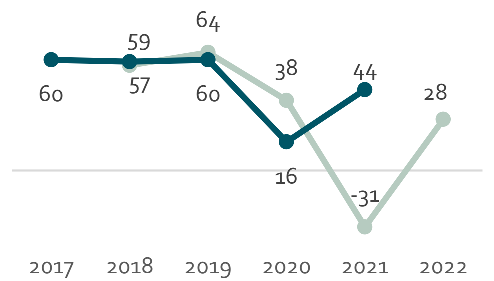
Saldo (positive minus negative opinions) for the current (now) and the future (in 12 months) economic condition within the company , 2017, 2018, 2019, 2020 and 2021 surveys results.

Actual condition   Expectation

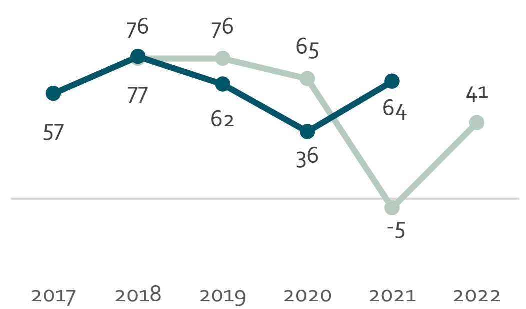
German producers



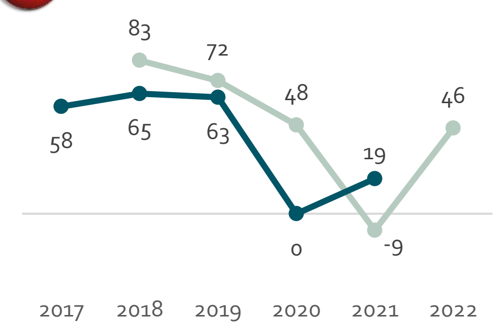
French producers



Italian producers



Spanish producers



Actual condition improved for all producer countries. Very negative expectations for 2021 were clearly outperformed.

Most positive expectations for Spanish and Italian wine producers who believe in the recovery of demand after the pandemic.

Expectations for 2022 of French and German producers positive but slightly less optimistic.

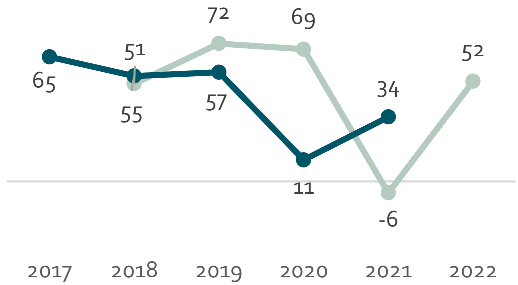
Economic condition Intermediaries

Current and future economic condition within the company

Saldo (positive minus negative opinions) for the current (now) and the future (in 12 months) economic condition within the company , 2017, 2018, 2019, 2020 and 2021 surveys results.

Actual condition   Expectation

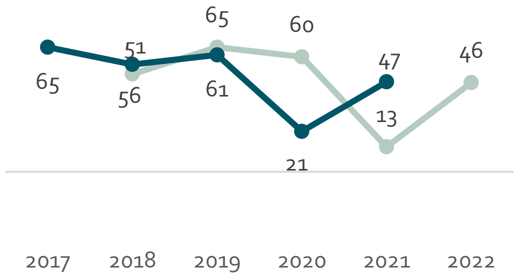
Exporters



Actual condition improved and better than expected.

Very positive expectations - almost as high as pre-pandemic level.

Importers



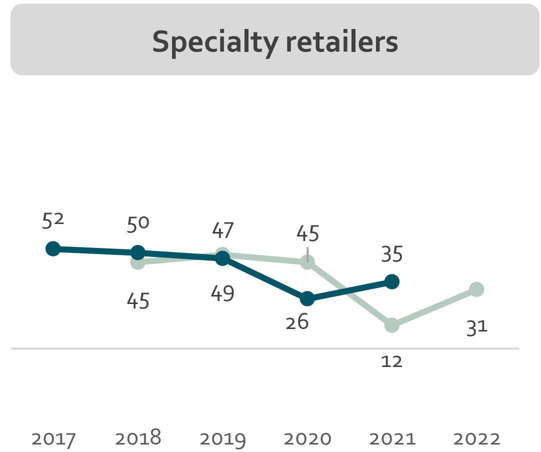
Actual condition improved and better than expected. Positive expectations almost at pre-pandemic levels.

Economic condition

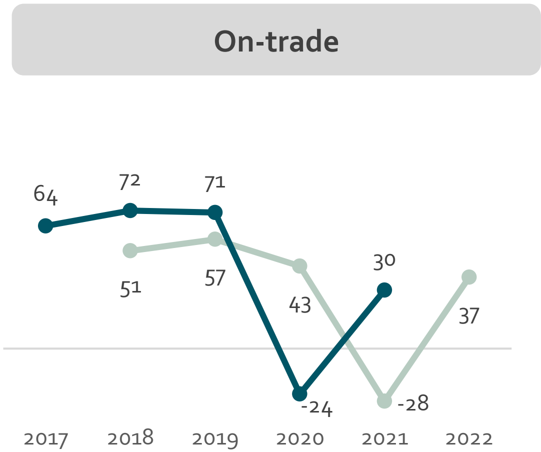
Current and future economic condition within the company

Saldo (positive minus negative opinions) for the current (now) and the future (in 12 months) economic condition within the company , 2017, 2018, 2019 and 2020 surveys results.

Strong rebound after first pandemic year.
Expectations for 2022 positive, similar to 2021.



Flattest curve of all producer and trade types.
Low impact of pandemic expected and observed. Moderate positive expectations.



Strong rebound and moderate optimistic expectations, hopeful for normalisation in 2022.

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

Chapter 4

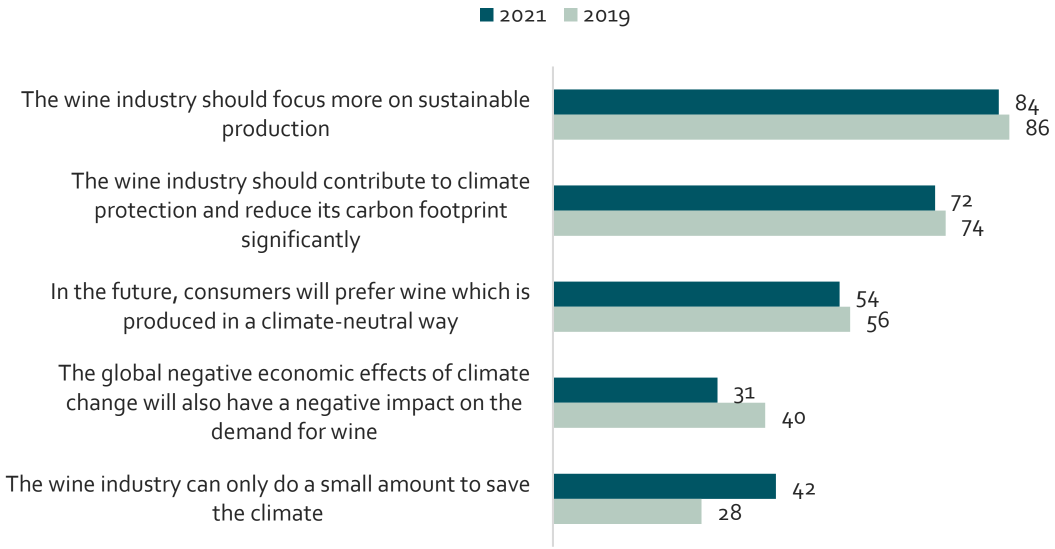
SUSTAINABILITY

No change in the importance of sustainability

Stability over time – results from 2019 and 2021 surveys

% who agree with the following statements

Base: 2019 n=1,178, 2021 n=2,673



No change since 2019

Since the ProWein Business survey in 2019 the perceived importance of sustainability for the wine sector has not changed.

Almost all agree that the wine sector should focus stronger on sustainable production. Unchanged, three in four agree that the carbon footprint should be reduced.

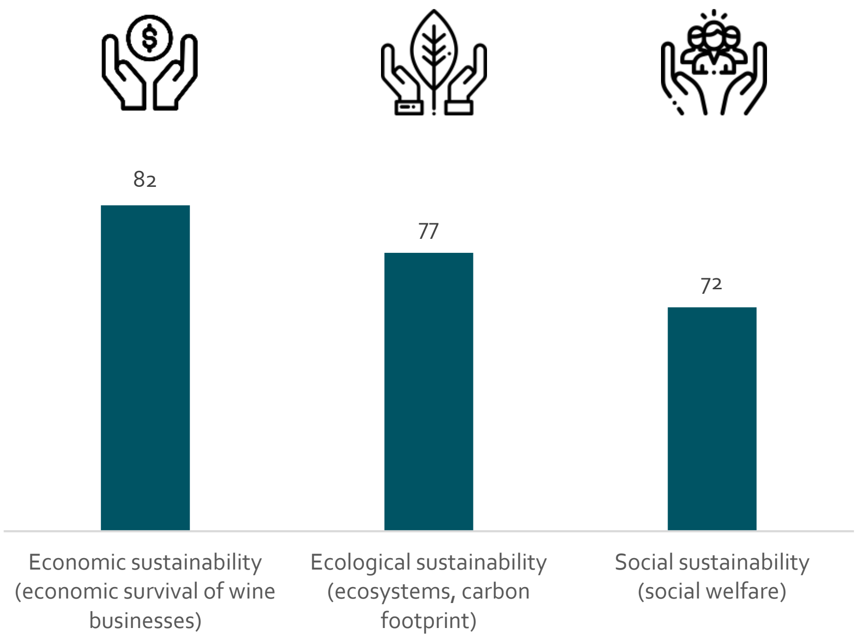
There are slightly less concerns about the negative economic effect of climate change on the demand for wine. This could be related to the observed robustness of demand for wine during the Covid crisis.

In 2021 more experts perceive the potential contribution of the wine sector to save the climate to be small relative to other global players.

Three pillars of sustainability

How important do you perceive each of the three pillars of sustainability for the wine sector?

(Scale 0 to 100, 0= all respondents state "not important at all", 100= all respondents state "very important")



The economic pillar of sustainability is perceived as the most important one .

Long term business survival is seen as a prerequisite of a business in the wine sector to contribute to ecological and social sustainability.

Statements and opinions

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

"The survey demonstrates a strong demand for an independent, credible and transparent sustainable certification scheme in the wine sector, especially on the producer side.

The companies strive to further improve their sustainability performance and prove and communicate this externally. However, it is crucial that such certifications schemes adopt a holistic view on the sustainability of the wine sector.

In order to further strengthen the ecological and social sustainability economic sustainability has to be ensured."

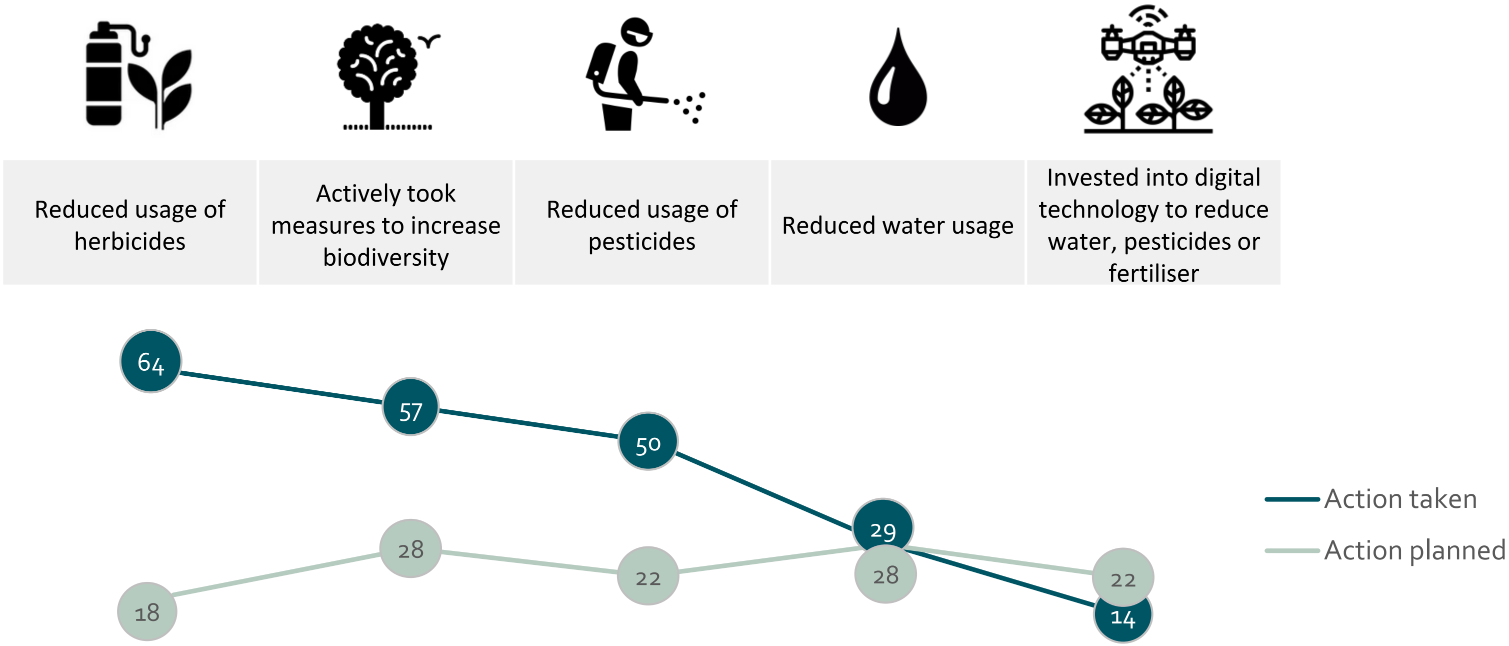
Prof. Dr. Moritz Wagner

Professor for sustainable use of resources and life cycle analyses for special crops
Geisenheim University

Actions for ecological sustainability

What actions did you take or plan to take for your company?

(Producers n=937)



64% of the wine-growing estates reduced the use of herbicides (France and Austria lead at 80%, followed by Spain 74%) and proactively promoted biodiversity (USA 78%, France 72%, Germany 61%). 50% had minimised the use of pesticides (New Zealand 100%, USA 90%, France 80%, Spain 70%), and just under 30% had reduced water consumption (South Africa 90%, New Zealand 50%, Portugal 40%).

Due to the high investment costs, digital technology for optimally dosing water, fertilisers and herbicides is so far not very widespread. The countries of the new world (Australia 50%, USA 33% and South Africa 33%) are leading here compared to old world nations (Spain and Italy 22%, France and Portugal 17%, Germany 11%).

Statements and opinions

"Respecting biodiversity is an essential quest for us and it is something that is even more important for future generations to come. As winegrowers, we must be exemplary and have the will to share our convictions. And my conviction is that biodynamic and organic viticulture are also the best way to reveal the perfect reflections of the terroirs."

Gérard Bertrand

Winegrower, winemaker and entrepreneur, leading 16 châteaux and estates in southern France, „Green personality of the year 2020" elected by Drinks Business

Alternative wine packaging

Hochschule Geisenheim University

ProWein
Internationale Fachmesse Weine und Spirituosen

Used alternative wine packaging
(light weight glass or non-glass)

(Producers n=1,095)

Country	Yes, specific action taken	Yes, specific action planned
New World	47	18
Other Europe	42	25
France	33	28
Italy	32	31
Spain	30	36
Germany	17	15

Listed alternative wine packaging
(light weight glass or non-glass)

(Trade n=1,661)

Country	Yes, specific action taken	Yes, specific action planned
Scandinavia	34	20
North America	24	25
Southern Europe	13	26
Central Europe	12	14
Eastern Europe	6	15
Belgium + Lux.	6	22
Germany	4	13
Netherlands	1	21

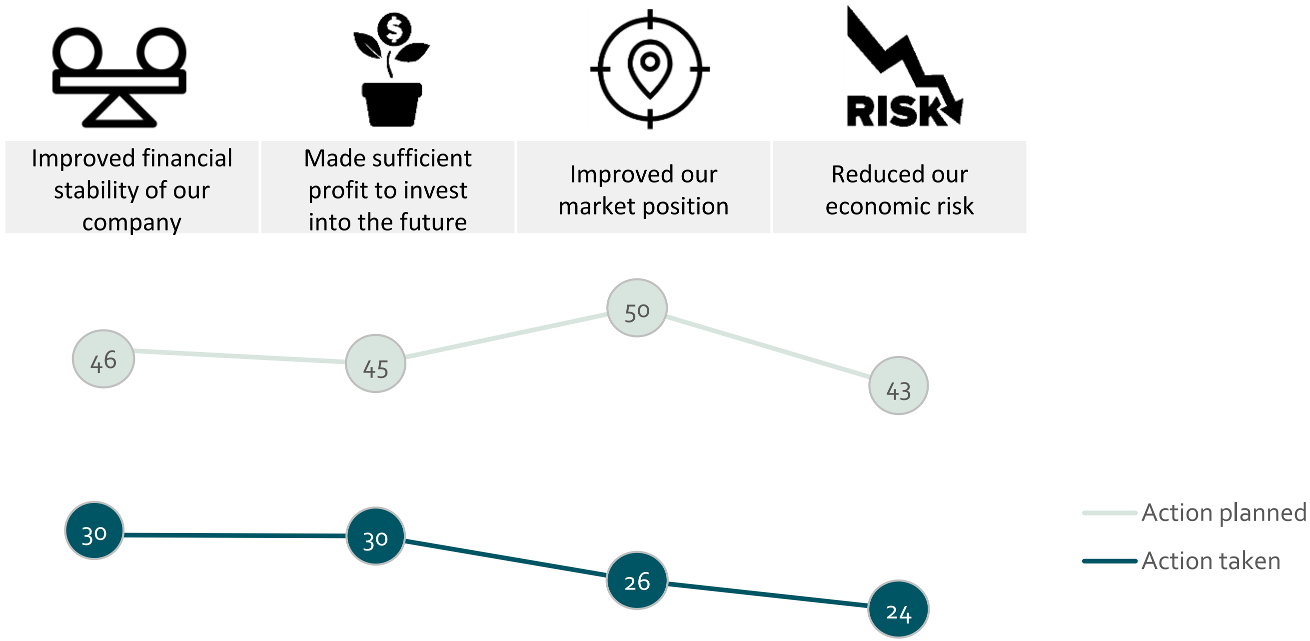
Actions for economic sustainability

Hochschule Geisenheim University

ProWein Internationale Fachmesse Weine und Spirituosen

What actions did you take or plan to take for your company?

(All n=2,441)



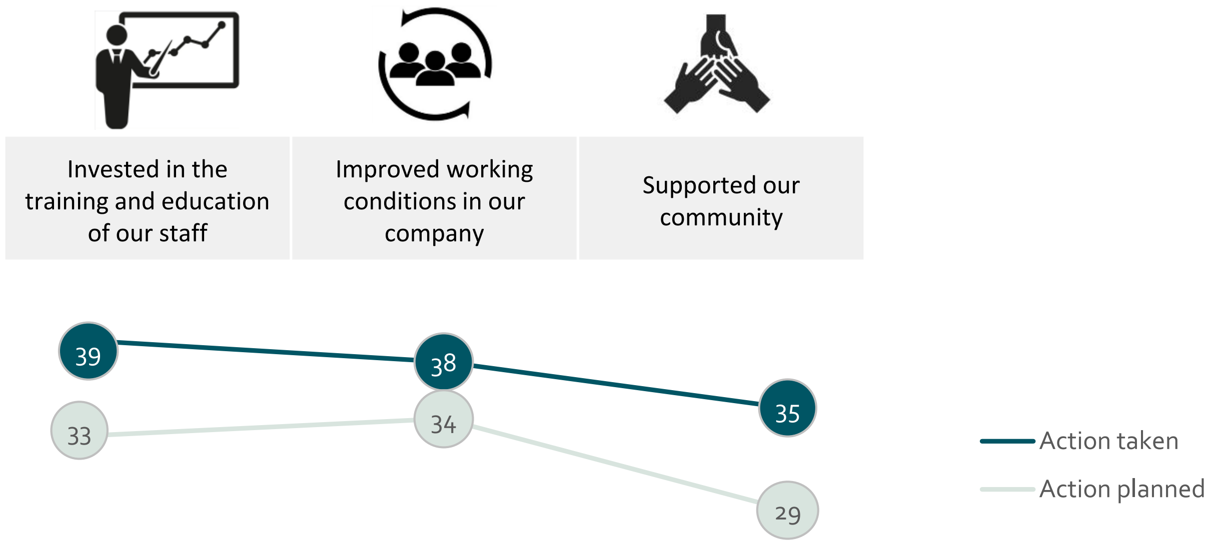
The pandemic made it challenging for businesses in the wine sector to improve their economic sustainability.

Only one in three to one in four could improve their economic condition. Almost every second company plans to actions for economic sustainability.

Actions for social sustainability

What actions did you take or plan to take for your company?

(All n=2,441)



About one in three businesses took measures for social sustainability. Training and education was most important, followed by improvement of working conditions.

The competition for skilled staff will make social sustainability more important in the near future.

Hochschule Geisenheim University

ProWein
Internationale Fachmesse Weine und Spirituosen

Chapter 5

Organic Certification

Certification – organic

Share of organically certified producers and trade

% of businesses

Base: n=2,880

	Producers	Trade
Certified	27	20
In the process of getting certified	9	5
Not certified, consider a certification in the future	18	18
Not certified, do not consider a certification in the near future	46	57

Because of its longer history and its start in the 1980s organic certification is already more common than the more recent sustainable certification.

Producers are further advanced than trade.

Organic producers differ by country

Share of organically certified wine producers by country

% of all small wineries, cooperatives and bottlers (n=1,099)

Country	organically certified	in the process of getting certified	not organically certified, but are considering a certification in the future	not organically certified, and are not considering a certification in the near future
Spain	61	8	14	16
Italy	52	13	18	17
France	35	19	23	24
Other Europe	21	16	27	37
Germany	21	7	15	57
New World	14	8	25	53

Countries differ strongly in the relative share of organically certified producers.
Differences reflect divergence of climatic conditions and the suitability for organic wine production.
The sample is not representative and the share of organic certified producers is higher than in the population but differences agree with official OIV data (Spain 121 KHA, Italy 109 KHA, France 112 KHA, Germany 10 KHA; KHA = thousand hectares).

Statements and opinions

"This great survey done by Geisenheim University shows that two relatively warmer countries such as Spain and Italy seem to be those where most wine producers are already organically certified. However, while climate change is widely accepted as a challenge among wine producers, it still seems not be a great concerns for wine trade.

For sustainable production to be successful, it should be shared as a major objective not only among producers, but also among trade and consumers, even though it may increase costs.„

Rafael del Rey
CEO, Spanish Observatory of Wine Markets (OeMv)

Organic certification – Pro & Contra

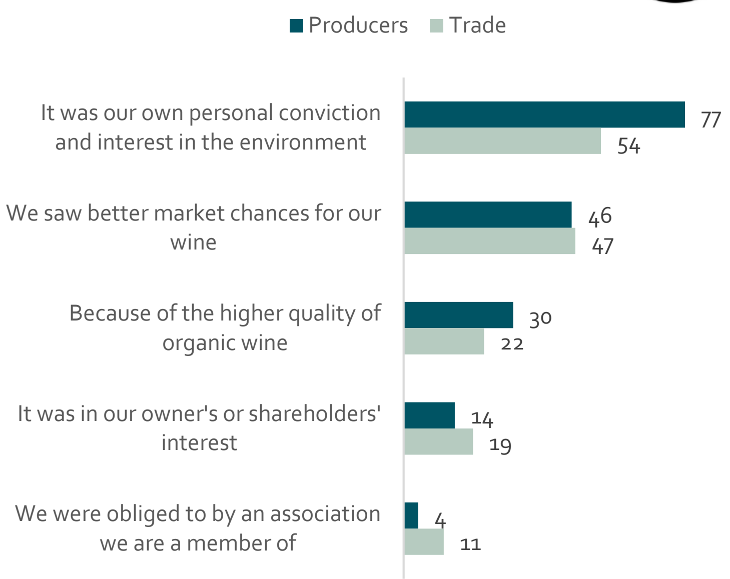
Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

What motivated you to become organically certified?

%, multiple responses possible, Base: n=1,227



What do you see as reasons for not becoming organically certified?

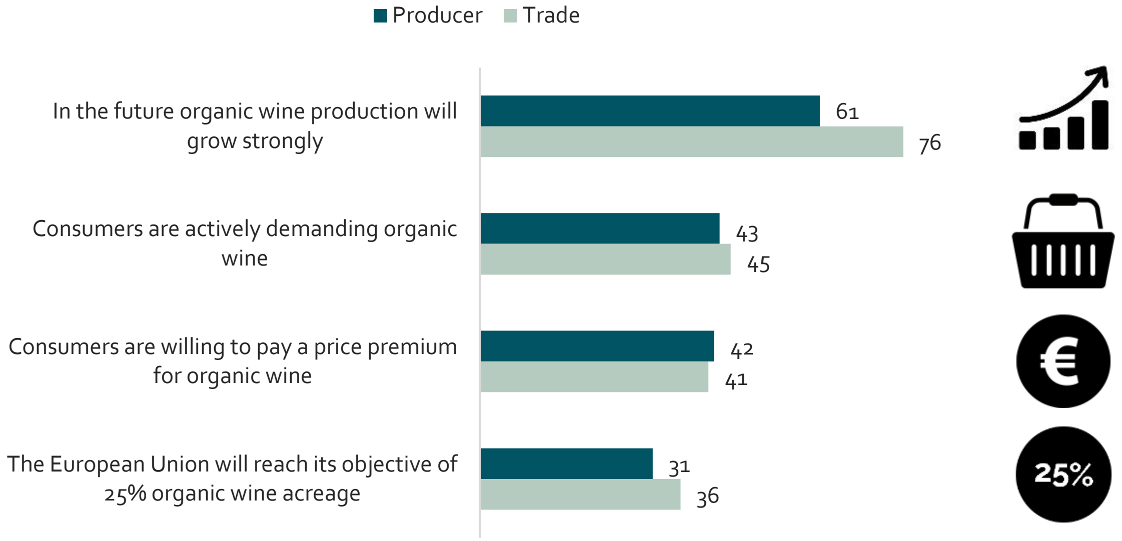
%, multiple responses possible, Base: n=1,717

Organic wine – demand

Agreement with statements about the demand for organic wine

% who agree with the following statements

Base: n=2,339



Trade experts see a stronger future increase of organic wine production.

Producers and trade agree in their moderate assessment of consumer demand for organic wine. Lessen than half see an active consumer demand and consumers' willingness to pay a price premium.

There is moderate optimism about future European organic wine production. One in three experts expect the European Union to achieve its objective of 25% organic wine acreage.

Organic – demand by country

Agreement with statements about demand for organic wine

% of producers

Base: All small wineries, cooperatives and bottlers (n=1,099)

Country	In the future organic wine production will grow strongly	Consumers are actively demanding organic wine	Consumers are willing to pay a price premium for organic wine	The European Union will reach its objective of 25% organic wine acreage	Share of respondents organically certified or in progress**
Spain	80	54	41	52	69
Italy	75	67	56	47	54
France	76	53	47	46	65
Other Europe	63	45	43	29	37
Germany	56	38	41	26	28
New World	53	40	30	18	22

Countries with higher shares of organic producers are more optimistic about the growth in organic wine production. Spain, France and Italy are most optimistic.

Countries differ slightly in producer assessment of consumer demand and willingness to pay for organic wine. It is highest in Italy, followed by France and Spain, and is lowest in Germany and the New World.

Organic wine - sustainability

Hochschule Geisenheim University

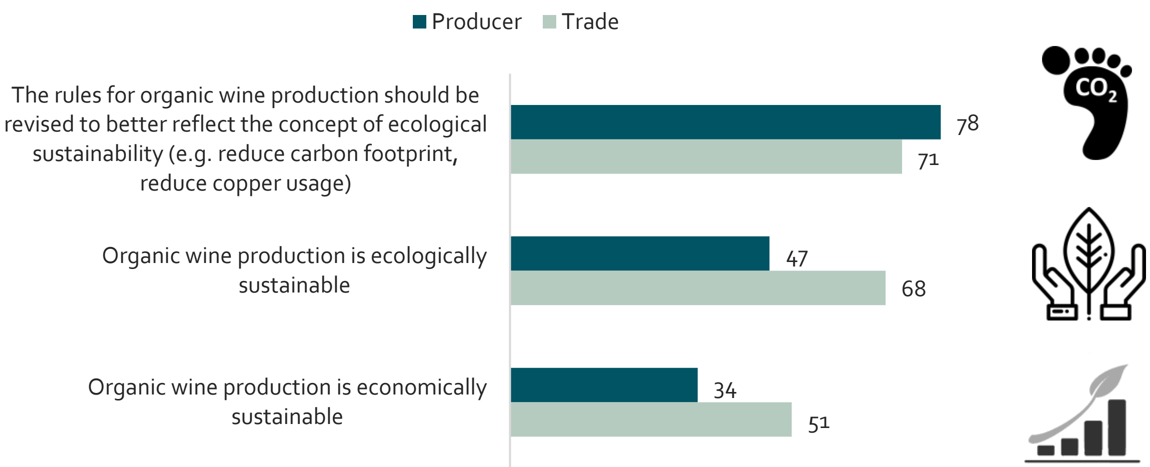
ProWein

Internationale Fachmesse Weine und Spirituosen

Statements about the sustainability of organic wine

% who agree with the following statements

Base: n=2,339



Both producers and trade demand an update of the rules for organic viticulture to better reflect ecological sustainability.
Less than one in two producers agree that organic wine production is ecologically sustainable.
Only one in three producers sees organic viticulture as economically sustainable.
Trade is less concerned about the sustainability of organic wine because it is somewhat separated from actual viticulture.

Organic wine – sustainability by country

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

Agreement with statements about organic wine

% of producers

Base: All small wineries, cooperatives and bottlers (n=1,099)

Country	The rules for organic wine production should be revised ...*	Organic wine production is ecologically sustainable	Organic wine production is economically sustainable	Share of respondents organically certified or in progress**
Spain	84	82	58	69
Italy	80	48	43	54
France	76	49	42	65
Other Europe	76	51	41	37
Germany	79	41	29	28
New World	77	51	32	22

Producers from all countries strongly agree in the need to revise organic production rules *to better reflect the concept of ecological sustainability (e.g. reduce carbon footprint, reduce copper usage).

One in two producers does not perceive organic wine production to be ecologically sustainable - with the exception of Spanish producers.

Differences in perceived economic sustainability strongly relate to the share of producers originally certified or in progress**. Economic sustainability is perceived highest in Spain and lowest in Germany and the New World.

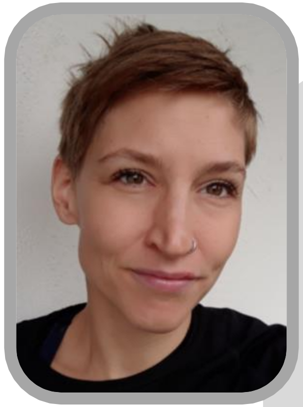
Statements and opinions

"The organic wine sector also sees the need to further develop its standards and has already begun to incorporate other aspects of sustainability, such as climate protection, economic viability and social justice.

But one thing is clear: ecological sustainability criteria must at least meet the EU organic standard - otherwise sustainability degenerates into a mere marketing phrase. Numerous successful wineries became certified organic in recent decades and have confirmed the economic viability of organic viticulture."

Petra Neuber
CEO of Ecovin

Statements and opinions



"Organic viticulture is a system that already implements many of the requirements for sustainability certification mentioned in the report, such as credibility, independence and critical control.

Since Demeter sees itself as a development community, our standards are constantly being developed further. Our winegrowers are already doing much more than required by the EU organic regulation. The holistic design of the cultivation system thereby is a particular focus.

Currently, we are working on the implementation of further sustainability criteria and in the future, the CO_2 footprint will also play a greater role."

Nina Weis
Demeter, Department of Wine and Gastronomy

Hochschule Geisenheim University

ProWein
Internationale Fachmesse Weine und Spirituosen

Chapter 6

Sustainable Certification

Certification –sustainable

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

Share of sustainably certified producers and trade

% of businesses

Base: n=2,880

	Producers	Trade
Certified	17	9
In the process of getting certified	6	6
Not certified, consider a certification in the future	34	26
Not certified, do not consider a certification in the near future	43	59

Sustainable certification is still relatively new and more common for wine producers. There is a large share of producers and trade who consider to be certified in the future.

Survey results suggest that both standards will converge at the moment there is more growth for sustainable certification, coming from a lower base.

There is a similar share both for organic and sustainable certification of 43%-59% of businesses who do not consider any certification.

Producers are further advanced than trade, both for organic and sustainable certification.

Sustainable certification by country Producers

Hochschule Geisenheim University

ProWein
Internationale Fachmesse Weine und Spirituosen

Is your business certified sustainably?

In % per country (only producers: small wineries, cooperatives, bottlers)

Base: n=1,219

	New World	France	Italy	Other Europe	Spain	Germany
Sustainably certified	50	48	29	26	13	9
In the process of getting certified	15	10	17	8	11	3
Not sustainable certified but are considering a certification in the future	23	25	38	39	53	32
Not sustainable certified and are not considering a certification in the near future	13	18	17	28	23	57

Being a more recent concept, certification as a sustainable producer is not yet as widespread as organic viticulture.
In the lead here are the New World and France where roughly half the vintners surveyed are already certified as sustainable.
In Spain, Italy, Portugal, Austria and Greece 40-50% of those polled are considering sustainability certification in future.

Sustainable certification

Is your business certified sustainably?

In % per business type

Base: n=2,397

	Small winery	Cooperative	Large winery	Exporter	Importer, distributer, wholesale	Specialty retailer	Hotel trade	Gastronomy
Sustainably certified	14	27	25	18	10	6	17	6
In the process of getting certified	5	11	11	7	7	5	3	4
Not sustainable certified but are considering a certification in the future	34	31	37	38	28	22	23	23
Not sustainable certified and are not considering a certification in the near future	47	31	26	37	56	68	57	66

Large producers like cooperatives and bottlers are forerunners in sustainable certification. In our sample four out of ten are certified or in the process of certification.
Of all producers, one in three considers a certification in the future.
At this stage wine trade is generally less involved in the certification of sustainability.

Sustainable certification – Pro & Contra

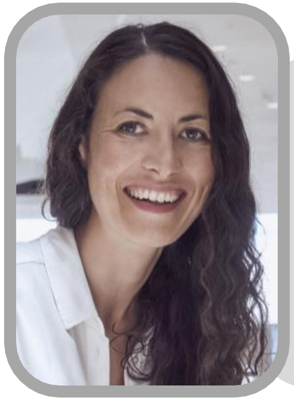
What motivated you to become sustainably certified?

%, multiple responses possible, Base: n=1,134

What do you see as reasons for not becoming sustainably certified?

%, multiple responses possible, Base: n=1,926

Statements and opinions



"Sustainable wine cannot be produced at the same cost as conventional wine because of the additional environmental and social benefits.

In my opinion, it is essential that wine that is labelled as 'sustainable wine' also lives up to the concept of sustainability: there must be tangible added value in all the important environmental, social and economic criteria."

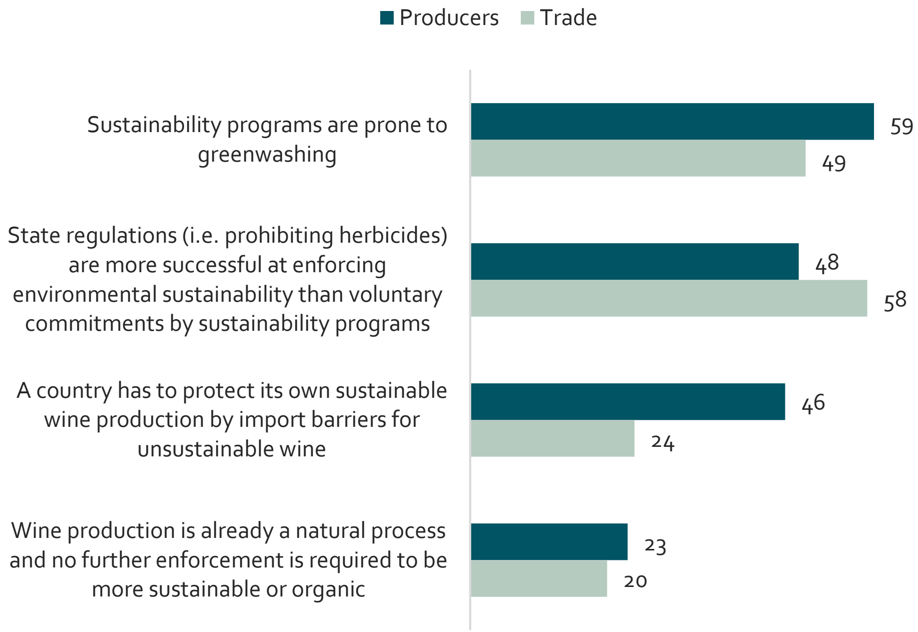
Dr Helena Ponstein

Sustainability Expert at Deutsches Institut für Nachhaltige Entwicklung & FairChoice®

Credibility, regulation, import barriers

% who agree with the following statements

Base: n=2,090



Sustainability programs have to be credible and transparent to address producers' and trade's fears of greenwashing.

Every second experts perceives state regulations as more successful in enforcing environmental sustainability than voluntary programs. Businesses certified organic or sustainably agree stronger with required state regulations. Certification and regulation have to go hand in hand.

Producers fear a competitive disadvantage from imported wine, which was not produced under the same strict sustainability standards. Every second producer requests import barriers for protection.

The majority of producers and trade experts agree that the wine sector has strong potential to become more sustainable. Only one in five experts perceive wine production as a natural process without further need of improvement.

Requirements – sustainability certification (I)

Which requirements should a sustainability certification process fulfil?

% who agree with the following statements

Base: n=2,296

Producers generally have stricter expectations than trade.

For both groups credibility, independence and critical control of information during the certification process are most important.

Individual advice and consultation of how to improve sustainability is second most important for producers.

Trade is more price sensitive – low fees are second most important.

Statements and opinions

"The industry requires more practical solutions and guidance of how to become more sustainable. This has to be our mission for research and knowledge transfer since it is far beyond certification."

Prof. Dr. Hans R. Schultz

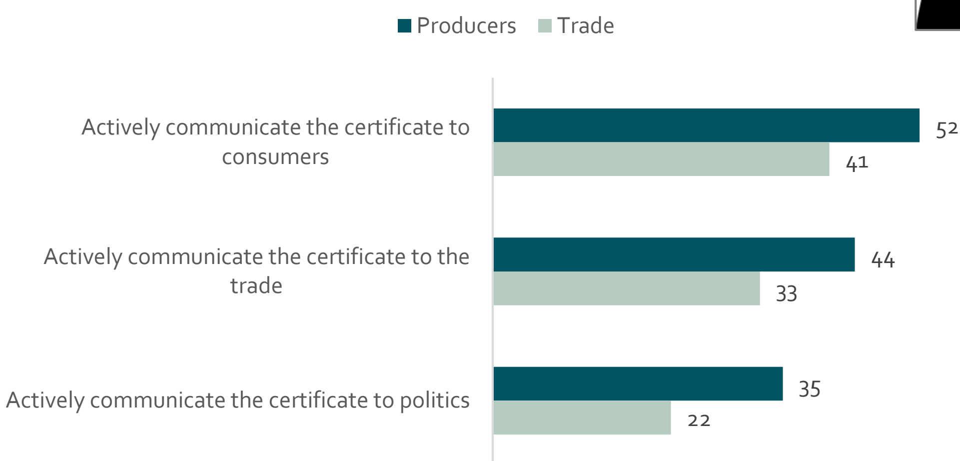
Director of Environ Group OIV and President of Geisenheim University

Requirements – sustainability certification (II)

Which requirements should a sustainability certification process fulfil?

% who agree with the following statements

Base: n=2,296



Producers have stronger expectations for the certification agency to communicate externally. Every second producer expects active communication to consumers, which requires substantial funding.

Both trade and producers agree in the relative order with consumers as most important target group followed by trade and politics.

Statements and opinions

Hochschule Geisenheim University

ProWein
Internationale Fachmesse Weine und Spirituosen

"The ProWein Business Report reconfirms the importance of sustainability for the wine sector. Systems like Fair'n Green with a high degree of credibility that support and consult producers and provide a network of modern sustainable wine businesses safeguard the future viability of the wine industry."

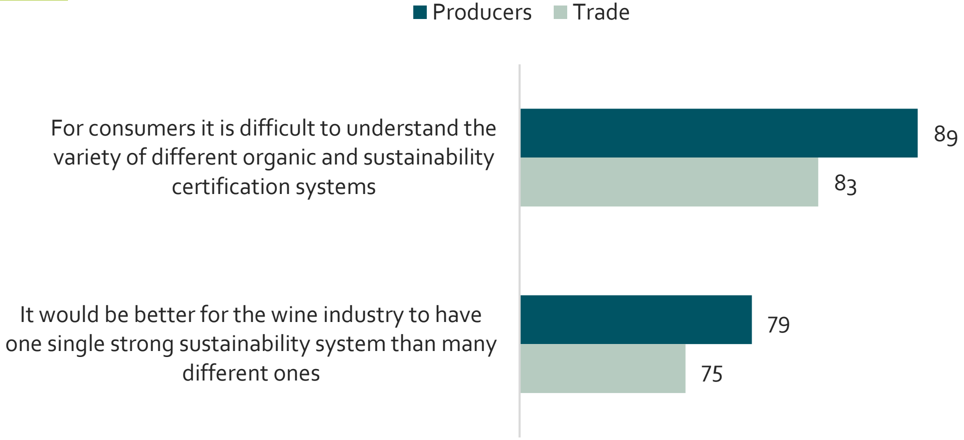
Keith Ulrich
Chairman, Fair´n Green

Communication through one strong standard

Communication to consumers

% who agree with the following statements

Base: n=2,090



Producers and trade agree that a plethora of different certification systems for organic and sustainable wine production create unnecessary impediment for communication with consumers.

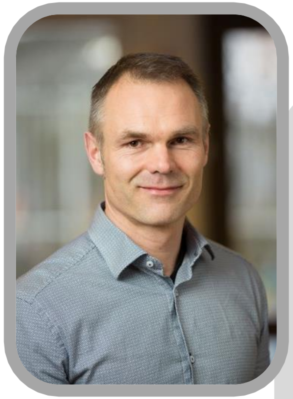
More than three out of four industry experts request one strong single sustainability system.

Statements and opinions

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen



"The great interest in sustainability shown in the report confirms our own observations on the Nordic market. Organic certified is one example of how sustainable products are communicated to customers. However, we welcome a complement to organic, addressing a wider scope of sustainability issues through national and regional sustainability certifications that are now established in many countries.

Systembolaget, as a monopoly retailer for alcoholic beverages on the Swedish market, values the sustainability work that is done through these certification programs. But we also note that there is a great need for harmonization in order to reach full potential through recognition among retailers and customers."

Marcus Ihre

Sustainability manager Supply Chain, Systembolaget

Chapter 7

Details of Method

Expert online survey

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

Timing

- The 2021 survey was conducted during November 2021.

Participants

- For the 2021 survey participants had to have exhibited at the 2019 ProWein or had to have visited the 2019 ProWein and agreed to be contacted by ProWein.
- All participants were asked to have leading rolls within their company or department.
- The high response rate of the 2020 survey confirms the high interest in in this years' focus topic Covid-19.

Method

- The surveys were conducted online.
- The surveys were offered in five language versions English, French, German, Italian and Spanish. Participants could choose the language of their preference.
- Participants who quit the survey too early or gave inconsistent answers were eliminated.

Company location of participants 2021
Producers and Exporters

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

Company location of participants	number	percent
Germany	738	55
Italy	129	10
France	122	9
Spain	111	8
Portugal	31	2
USA	25	2
Austria	23	2
Chile	13	1
Greece	12	1
South Africa	11	1
Argentina	8	1
Switzerland	8	1
Hungary	7	1
Other country	95	7
Total	1,333	100

Company location of participants 2021
Importers, Retail, On-trade

Hochschule Geisenheim University

ProWein

Internationale Fachmesse Weine und Spirituosen

Company location of participants	number	percent
Germany	739	48
Netherlands	109	7
Belgium	71	5
Canada	63	4
USA	56	4
Switzerland	44	3
Denmark	41	3
Sweden	32	2
Austria	30	2
Finland	25	2
Russia	25	2
United Kingdom	24	2
Poland	23	1
Czech Republic	21	1
Italy	20	1
Other country	224	14
Total	1,547	100

Internationale Fachmesse
Weine und Spirituosen

Contact Information

Christiane Schorn
Manager Press Department ProWein
Messe Düsseldorf
Tel. +49 211 4560 991

SchornC@messe-duesseldorf.de

Prof. Dr. Simone Loose
Head of Department of Wine and Beverage Business Research
Geisenheim University
Tel. +49 6722 502 382

Simone.Loose@hs-gm.de

Geisenheim study programs and new part time MBA „Management in Wine Business“