

Breaking News : Wine

Week Ending : Friday 19th March 2021

This bulletin is provided by Knowledge Gaps Ltd.

The purpose of this bulletin is to summarise key events in the wine category in the latest week in the major retailers. The report covers the entire wine market and covers price changes, promotion activity, category changes, and new products. It is based upon store visits to the major retailers this week.

It is divided into 5 sections - a) Headlines b) Range c) Promotion / Retail Prices / Display d) Range & Price Analysis e) Promotion & Display Analysis.

Section A : Headlines

New promotion periods began in Asda, Morrison's and the Co-op.

Asda have introduced a 'Buy 6 Or More Save 25%' offer. Pictures no.1 to no.3 below.

Tesco have introduced a 'Drinks Festival' which lasts for 3 weeks. Pictures no.4 and no.5 below.

Aldi have introduced one of their most far-reaching range changes ever and, to our eyes, they are 'thought-leaders' to some extent with some new wines that push the boundaries - for example, grape varieties that we have not seen elsewhere. We wonder if the main grocery retailers have something to learn from Aldi. Examples of the new wines are pictured below, pictures no.6 to no.8 below.

Lidl have introduced their latest 'The Wine Tour' range. Pictures no.9 to no.11 below.





Section B : Range

This section picks out this week's key new listings and range developments. Unless stated, the wines are in the standard 750ml bottle size.

Sainsbury's : A few new listings to report this week : Sparkling - Babe Sparkling White 200ml can ; New Zealand - Stoneleigh SB ; Spain - Cepa Madre Tempranillo Garnacha. See pictures below.



Waitrose : A handful of listings this week : Champagne - Lanson Black Label 1.5 litre magnum ; Louis Roederer Brut Premier 1.5 litre ; France - Rock Angel Cotes De Provence Rose ; Germany - Urmeer Pinot Gris ; USA - Bonterra Estate Collection Organic Chardonnay. See pictures below.



Section C : Promotions / Retail Price Changes / Display

This section highlights the key price changes and new promotions that caught the eye this week. This section also highlights the main display developments this week. It is based upon a sample of large outlets (which may not be completely representative of the national picture).

Tesco

The front-of-store event aisle now features a 'Drinks Festival' which lasts for 3 weeks from 15th March to 6th April 2021. It has 3 modules of display space for a selection of new price features on a number of wines and there is also a module of space for alcohol free drinks which includes some wines. Pictures no.1 to no.5 below show the display space and pictures no.6 onwards are examples of the new price features that started this week.

As well as the 'Drinks Festival', the extensive mix of price offers introduced last week continue on well-known brands, Tesco-exclusive wines and Tesco Finest wines. Many of these offers are also featured off-shelf.







Sainsbury's

The key theme continued into the final week of the promotion period : a wide selection of price features from across the entire range - all price points, all countries of origin and a typical mix of offers on well-known brands, Sainsbury's-exclusive wines and JS Taste The Difference wines. Many of the offers are featured off-shelf.

This week was quiet with just a couple of changes to report : Sparkling - Mionetto Prosecco - £10.00 → £8.00 ; Tempus Two Copper - £16.00 → £12.00 ; France - La Terrasse Chablis - £12.50 → £11.00. See pictures below.



Asda

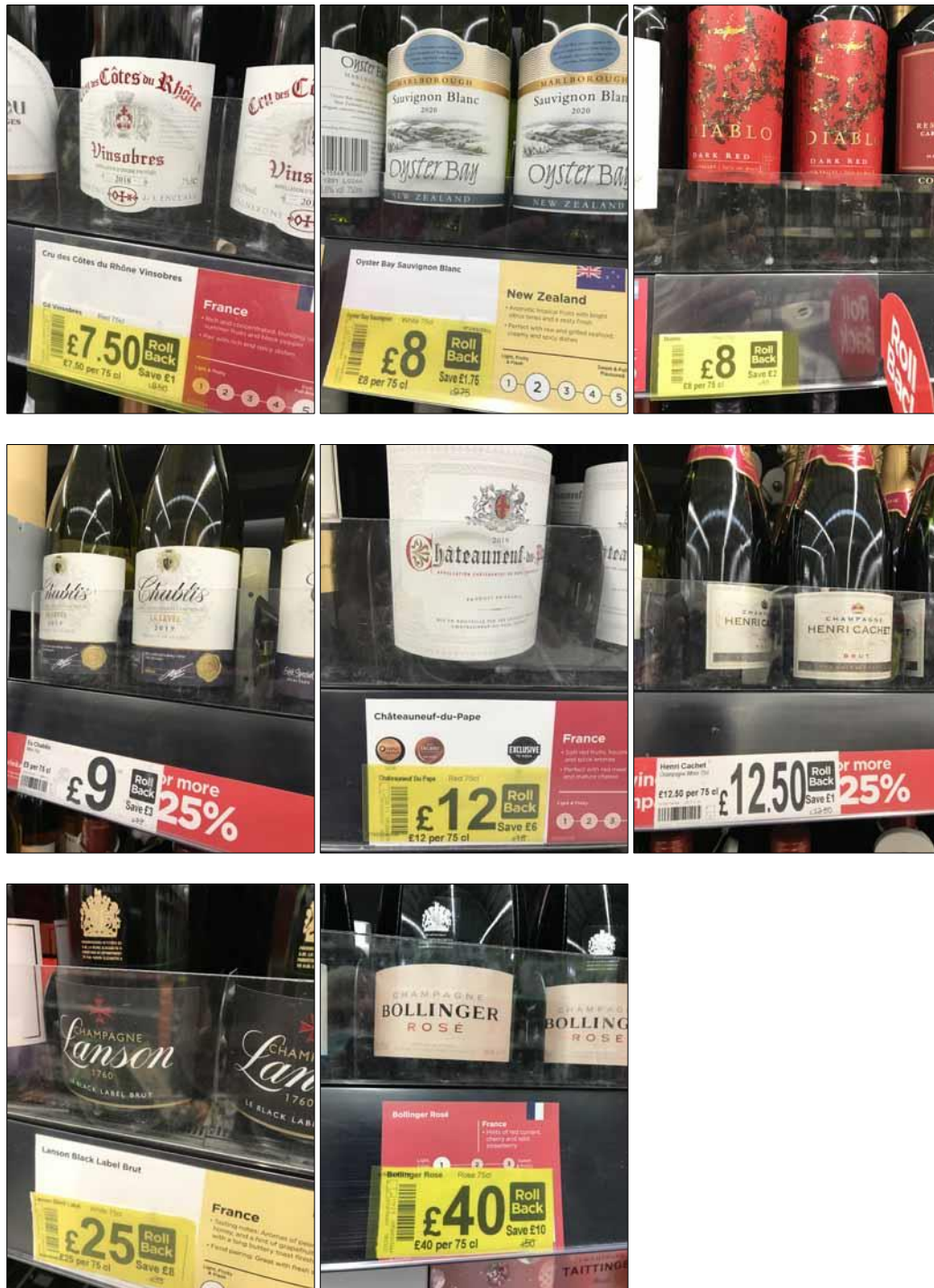
A 'Buy 6 Or More Save 25%' category discount offer started on Friday 19th March. At this stage we don't know how long it will last. It applies to wines retailing at £4.75 or more (which is higher than the usual £4.50 threshold). As you'd expect, it is prominently featured in-store. Pictures no.1 to no.4 below.

As well as the category discount offer, a new promotion period began this week with a typically wide selection of price features, mostly at 'round-pound' and £x.50 price points. Many of these offers are featured off-shelf via gondola ends and ladder racks. See pictures no.5 and no.6 below and pictures no.7 onwards are examples of the latest promotions.









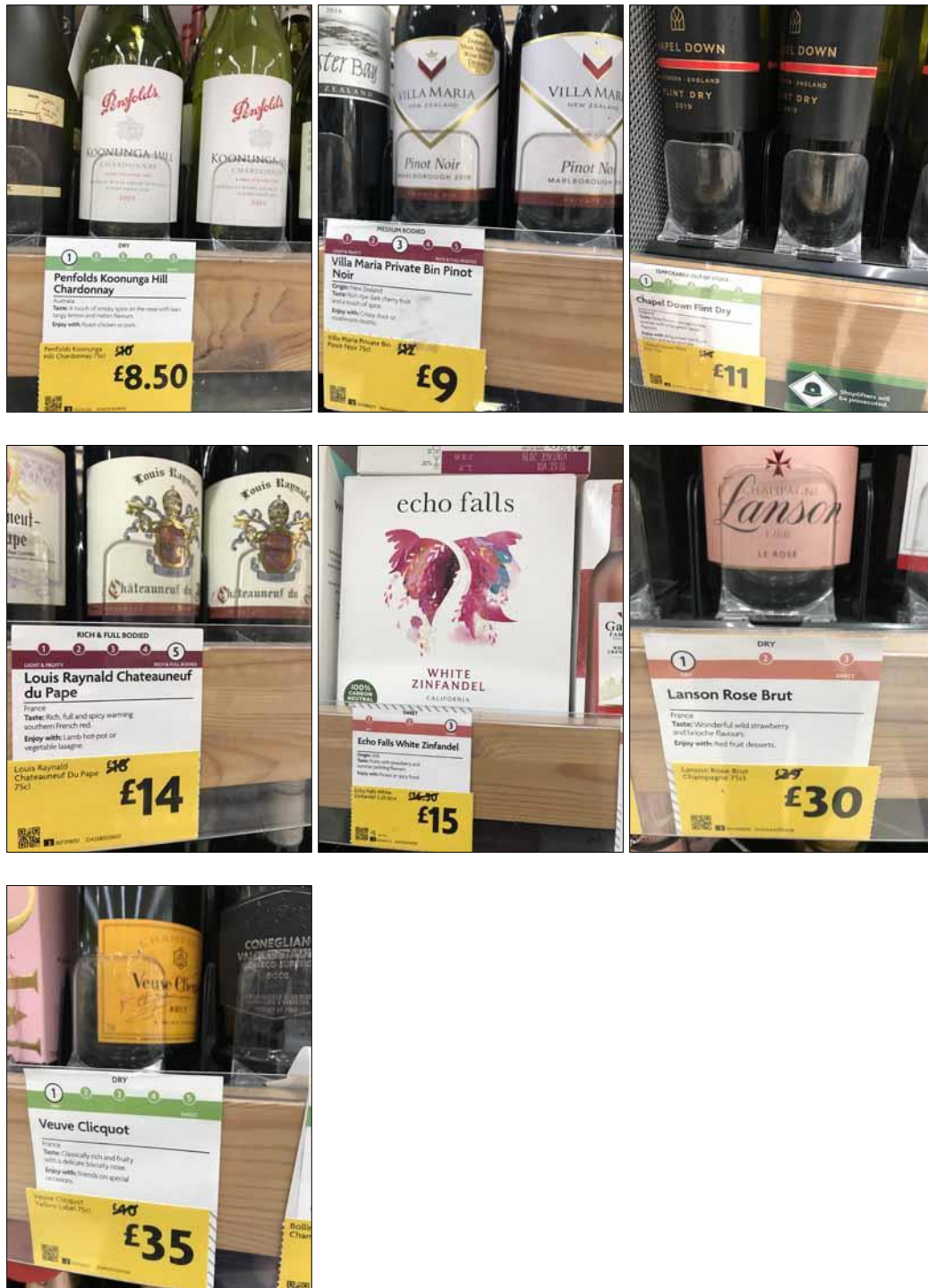
Morrison's

A new promotion period began this week with the following themes : an extensive selection of price features including some at £4.99 and offers at 'round-pound' and £x.50 price points ; price features on a number of Morrison's The Best wines ; the 2F£10 basket ; and some wines continue in a '£12 Meal Deal'.

This week's new promotions are dominated by price features. Firstly, wines from Anakena / Gallo / Sorso are at £4.99. The supporting cast is wines at £5.50 / £6.00 / £6.50 / £7.00 / £7.50 / £8.00 and many more. Examples of the latest offers are pictured below with the photos organised in price point order, lowest to highest.







A number of Morrison's The Best wines are price featured with some of them displayed in the wooden display racking. Pictured below.



Waitrose

A new promotion period began last week and the key themes continued this week - wide selections of wines at Save 1/3rd / Save 25% / Save 20% / Save £x / and a couple of 'round-pound' price features. Many of the offers are featured off-shelf.

This week was quiet with no significant changes to report.

Co-op

A new promotion period began this week with the usual theme : a broad selection of price features mostly at Save £1 / Save £1.50 / Save £2. Many of the offers are featured off-shelf.

These offers began this week : Champagne - Lanson Black Label - £35.00 → £25.00 ; Pol Roger Brut - £40.00 → £35.00 ; Sparkling - Corte Molino Prosecco - £8.50 → £7.00 ; Australia - Berton Black Shiraz / Vermentino - £8.25 → £7.25 ; Hardy's Voyage wines - £7.00 → £5.00 ; Jacob's Creek Le Petit Rose - £8.00 → £6.00 ; Wolf Blass YL wines - £8.50 → £7.50 ; Bulgaria - Silver Mine wines - £6.00 → £5.00 ; Chile - Casillero Del Diablo CS / SB - £8.25 → £6.25 ; France - Famille Perrin Les Cardinaux Cotes Du Rhone Villages - £10.00 → £8.00 ; La Vieille Ferme Rose / White - £7.75 → £6.75 ; Italy - Artusi PG - £7.00 → £5.00 ; New Zealand - Oyster Bay SB - £9.50 → £7.50 ; South Africa - The Weatherman SB - £6.50 → £5.50 ; Zalze SGV - £7.85 → £6.85 ; Spain - Campo Viejo Rioja Tempranillo - £8.85 → £6.85 ; I Heart Rose / SB - 2F£10 ; USA - Barefoot Merlot - £7.00 → £6.00 ; Blossom Hill White Zinfandel - £7.00 → £6.00. See pictures below.





Other Trade Channels

As well as the major grocery multiples, we also audit other trade channels such as Convenience / Discounters (Aldi & Lidl) / Wholesale. We don't intend to cover these channels in detail in this bulletin but, if we do see anything of particular interest, the section below will give you a few words to bring them to your attention. Some weeks there may be nothing significant to report but, in other weeks, there will be things to report.

DISCOUNTERS

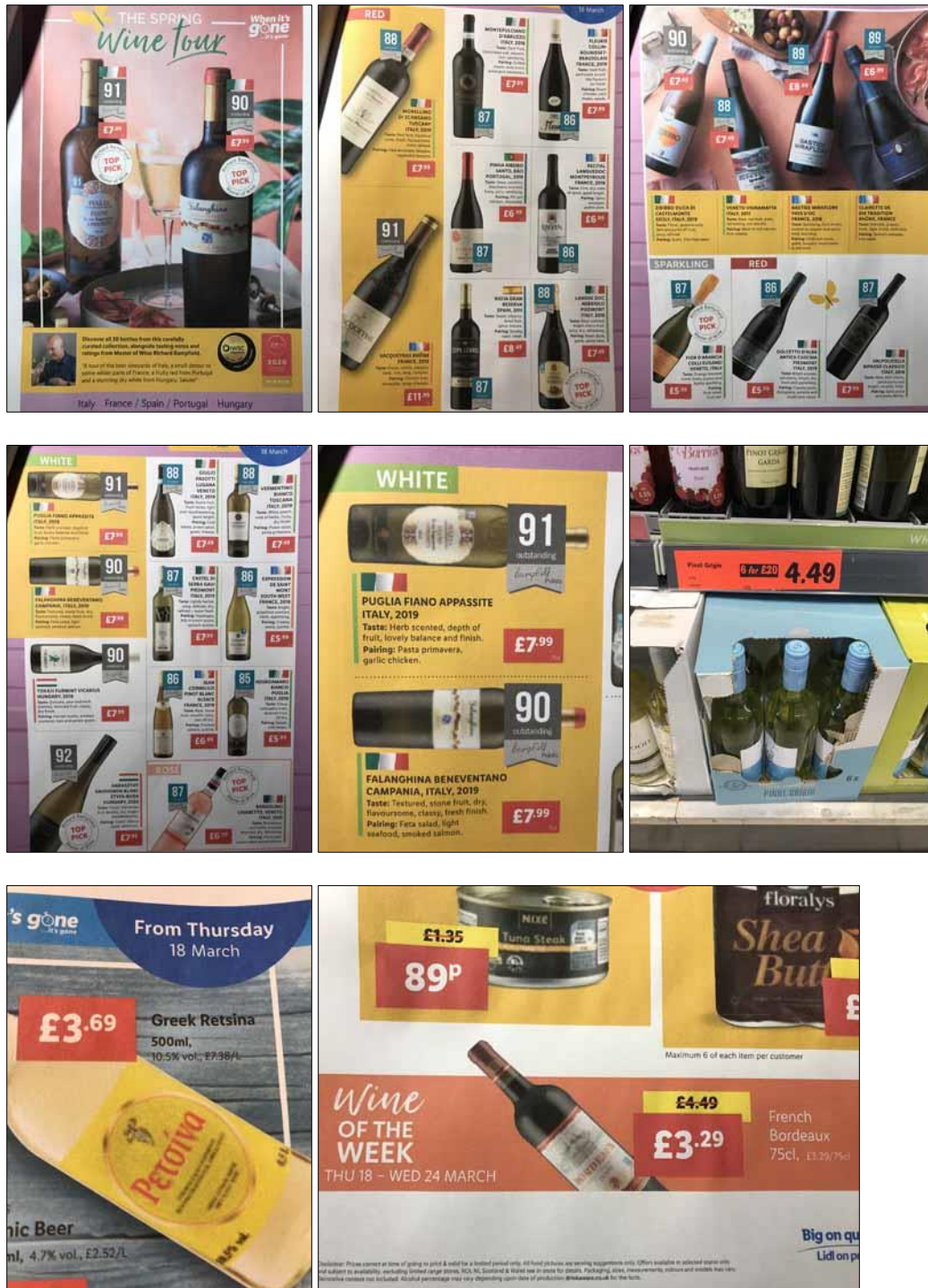
We track Aldi & Lidl via a combination of on-line, in-store and the weekly leaflets.

Aldi : A major range review has been implemented - it's as big a range change as we can recall in Aldi (over 70 new or reintroduced wines) but, as well as it's sheer breadth, it has variety and interest with unusual grape / region listings which seem to suggest that Aldi have really put some work into this range. For example, there's a Chilean Sangiovese, a Portugese Vinho Verde Rose, an Argentinian Criollo Grande, an Argentinian White Malbec, a French Coteaux De Bezier, a Uruguayan Criollo Tannat and an array of new Aldi Specially Selected wines. Also, the bag-in-box range has been extended and there are a couple of sparkling wines in 200ml cans. Many of these wines are featured in Aldi's Easter brochure. Implemented swiftly across all the stores we visited. Pictured below.





Lidl : The latest 'The Wine Tour' range was introduced this week and is featured across several pages in this week's leaflet - it is expected to last a couple of months and is dominated by wines from France / Hungary / Italy / Portugal / Spain. We have seen some of the wines before but many of them are wines we haven't seen before. Pictures no.1 to no.5 below. Other developments this week : Perfect With Fish Pinot Grigio is 6F£20 (picture no.6 below) ; this week's leaflet has a 'Greece' theme which includes Retsina 500ml at £3.69 (picture no.7 below) ; and the latest 'Wine Of The Week' is Bordeaux Red at £4.49 → £3.29 (final picture below).



CONVENIENCE

Our auditing in this trade channel is based on store visits, promotion leaflets and on-line.

A new promotion period began in Spar. Examples of the latest offers are pictured below.



Section D : Promotion / Display Analysis

This section provides some headline numbers on range size, promotions, off-shelf displays and new listings. It is a snapshot based upon our most recent weekly audits.

TOTAL RANGE SIZE / PROMOTION & OFF-SHELF DISPLAY								
Wine - England								
	Products Stocked	Products On Promotion	% On Promotion	Average % Promotional Discount	Products With Secondary Display	% With Secondary Display	Delisted / Double Check Products	New Lines / Reintroduced Products
Aldi	201	8	4%	11.0%		0%	46	73
Asda	534	241	45%	18.4%	57	11%	2	1
Co-op	383	55	14%	16.6%	27	7%	37	3
Lidl	143	4	3%	19.0%	2	1%	33	28
Morrison's	558	260	47%	20.5%	42	8%	1	1
Sainsbury's	673	161	24%	17.5%	29	4%	20	4
Tesco	653	198	30%	19.5%	79	12%	7	
Waitrose	744	159	21%	24.3%	26	3%	42	12

Note : The 'Products On Promotion' numbers include long-term multibuy offers such as the 2F£10 basket in Morrison's and mini bottle multibuy deals.

Section E : Range / Price Analysis

This section provides some headline numbers on how the range is broken down across the top 6 grocery multiples and Aldi & Lidl. It is a snapshot based upon our most recent weekly audits.

The 'Average Base Price' is based on retail prices excluding price features. The 'Average Actual Price' takes into account any price features that are currently running (but doesn't take multibuys into account).

Tesco	Wine		
	Products Stocked	Average Base Price	Average Actual Price
Grand Total	653	8.79	8.45
90ml			
187.5ml	22	1.98	1.98
200ml	11	2.55	2.55
250ml	10	2.06	2.06
375ml	8	8.72	8.72
500ml	3	4.17	4.17
1 litre	1	3.25	3.25
1.5 litre	8	14.75	14.25
2.25 litre	14	13.53	13.53
3 litre	2	14.50	14.50
3 x 200ml			
4 x 200ml			
4 x 250ml			
750ml	574	9.10	8.73
Champagne	23	32.13	31.00
Sparkling	45	9.71	9.14
Red Wine	238	8.78	8.38
Rose Wine	48	7.37	7.08
White Wine	187	7.83	7.57
Aromatised	18	4.50	4.44
Alcohol Free	15	3.87	3.63

Sainsbury's	Wine		
	Products Stocked	Average Base Price	Average Actual Price
Grand Total	673	10.29	9.81
90ml			
187.5ml	27	2.25	2.25
200ml	15	3.04	3.04
250ml	4	2.65	2.40
375ml	14	11.73	10.66
500ml	1	12.00	12.00
1 litre	1	3.25	3.25
1.5 litre	12	29.25	28.75
2.25 litre	29	14.66	14.66
3 litre			
3 x 200ml			
4 x 200ml			
4 x 250ml			
750ml	570	10.26	9.74
Champagne	32	39.44	37.88
Sparkling	51	10.42	9.06
Red Wine	228	9.04	8.63
Rose Wine	46	7.52	7.16
White Wine	185	8.26	7.89
Aromatised	7	3.93	3.79
Alcohol Free	21	4.46	4.46

Asda	Wine		
	Products Stocked	Average Base Price	Average Actual Price
Grand Total	534	7.85	7.17
90ml			
187.5ml	25	1.77	1.77
200ml	12	2.22	2.22
250ml	3	1.50	1.50
375ml	1	25.00	18.00
500ml			
1 litre			
1.5 litre	3	14.17	12.67
2.25 litre	19	13.22	12.83
3 litre	4	15.38	15.13
3 x 200ml			
4 x 200ml			
4 x 250ml			
750ml	467	8.00	7.26
Champagne	20	32.78	28.28
Sparkling	37	8.12	7.46
Red Wine	181	7.49	6.90
Rose Wine	43	6.17	5.77
White Wine	160	6.63	5.98
Aromatised	13	3.85	3.81
Alcohol Free	13	3.75	3.59

Morrison's	Wine		
	Products Stocked	Average Base Price	Average Actual Price
Grand Total	558	8.73	8.14
90ml			
187.5ml	21	2.14	2.14
200ml	8	3.00	2.94
250ml			
375ml	4	9.56	9.56
500ml	2	10.25	10.25
1 litre	3	4.42	4.42
1.5 litre	2	20.50	19.00
2.25 litre	18	14.39	14.14
3 litre	2	20.00	20.00
3 x 200ml	1	7.25	7.25
4 x 200ml			
4 x 250ml			
750ml	497	8.82	8.17
Champagne	19	31.05	28.16
Sparkling	39	10.05	9.21
Red Wine	186	8.33	7.73
Rose Wine	50	7.59	7.19
White Wine	172	7.73	7.21
Aromatised	13	5.02	4.35
Alcohol Free	18	4.32	4.01

Waitrose	Wine		
	Products Stocked	Average Base Price	Average Actual Price
Grand Total	744	14.64	13.83
90ml			
187.5ml	18	2.44	2.38
200ml	8	4.34	4.05
250ml	9	5.32	4.99
375ml	31	13.89	13.48
500ml	10	11.92	11.54
1 litre			
1.5 litre	15	44.14	42.61
2.25 litre	18	20.37	20.37
3 litre			
3 x 200ml			
4 x 200ml			
4 x 250ml	2	18.99	18.99
750ml	633	14.45	13.57
Champagne	36	52.64	47.92
Sparkling	42	15.75	14.08
Red Wine	256	12.90	12.25
Rose Wine	47	10.16	9.42
White Wine	242	11.40	10.93
Aromatised	1	2.99	2.99
Alcohol Free	9	5.36	5.36

Co-op	Wine		
	Products Stocked	Average Base Price	Average Actual Price
Grand Total	383	8.44	8.24
90ml			
187.5ml	24	2.11	2.11
200ml	6	3.43	3.43
250ml	5	1.77	1.77
375ml	2	8.50	8.50
500ml	2	6.25	6.25
1 litre			
1.5 litre	1	15.00	15.00
2.25 litre	7	15.14	15.14
3 litre	6	18.75	18.75
3 x 200ml			
4 x 200ml			
4 x 250ml			
750ml	330	8.76	8.52
Champagne	10	32.00	30.20
Sparkling	18	9.15	9.01
Red Wine	158	8.54	8.35
Rose Wine	24	7.17	6.84
White Wine	114	7.53	7.37
Aromatised	2	6.50	5.50
Alcohol Free	4	3.25	3.25

Aldi	Wine		
	Products Stocked	Average Base Price	Average Actual Price
Grand Total	201	5.52	5.48
90ml			
187.5ml	3	1.39	1.39
200ml	4	1.82	1.82
250ml			
375ml			
500ml			
1 litre	1	2.99	2.99
1.5 litre			
2.25 litre	4	11.69	11.69
3 litre	1	4.75	4.75
3 x 200ml			
4 x 200ml			
4 x 250ml			
750ml	188	5.55	5.51
Champagne	3	14.16	14.16
Sparkling	15	5.90	5.84
Red Wine	67	5.23	5.22
Rose Wine	32	5.66	5.54
White Wine	68	5.41	5.39
Aromatised	3	4.09	4.09
Alcohol Free			

Lidl	Wine		
	Products Stocked	Average Base Price	Average Actual Price
Grand Total	143	5.68	5.66
90ml			
187.5ml			
200ml	3	1.66	1.66
250ml	4	1.85	1.85
375ml			
500ml	1	3.69	3.69
1 litre			
1.5 litre			
2.25 litre	2	11.69	11.69
3 litre			
3 x 200ml			
4 x 200ml			
4 x 250ml			
750ml	133	5.81	5.79
Champagne	2	11.99	11.99
Sparkling	11	6.32	6.32
Red Wine	57	5.98	5.95
Rose Wine	11	4.88	4.88
White Wine	51	5.53	5.52
Aromatised	1	2.29	2.29
Alcohol Free			