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Simon Gresty,
Chairman of
Can Makers

As the global canned wine market continues to demonstrate strong growth, UK sales are soaring, quadrupling in the last two years alone¹. And it's not just white wines that are doing well. In fact, there is little doubt that the future of canned wine looks rosé, red, white, and whatever your preference, undeniably bright for producers, brands, designers, retailers, and of course, consumers.

Although wine in cans, which has been on the market for longer than many realise, has been subject to criticism over the years, the change in attitude from acceptance to celebration, has accelerated rapidly in the last 18 months.

The wider shift from keg to can, driven by the coronavirus pandemic and the closure of the hospitality industry, also contributed to the acceleration of the canned wine movement. At the same time a general trend towards healthier living and a shift towards drinking in moderation has influenced purchasing behaviour significantly. Coupled with the desire for a single-serve option for hygienic reasons, plus the importance of portability and the convenience cans offered for social occasions outside the home during the pandemic, all of these factors have combined to drive significant continued growth in the canned wine market.

The rise of low and no alcohol drinks in response to public desire for a healthier lifestyle will have surprised few. But breaking with tradition again, the canned wine sector was quick to move on the opportunity as well. It is an opportunity that will undoubtedly continue to grow as rising numbers of consumers seek to adopt healthier lifestyles.

Married to this is the increasing drive for sustainability. Consumers are concerned about the planet's well-being as well as their own and this concern is influencing purchasing decisions and the brands they engage with, more than ever before. What is a product's carbon footprint? How environmentally responsible is the brand? Can the packaging be recycled, and how easy is it to recycle? These are the questions being asked by consumers, questions that are indicative of widespread popular opinion and which underpin the



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success of the can, which offers robust environmental credentials for stakeholders throughout the value chain.

With more and more brands adopting, and even launching wines exclusively in cans, it is not just the variety that has increased, but perhaps more importantly, the quality of wine available in an accessible format, the can appealing to consumers put off by the mystique and perceived snobbery of expensive bottled wine.

And far from resting on its laurels, the sector has continued to innovate – traditional brands have adopted the can to reach new audiences while challenger brands have poured in, disrupting the stability of an established market, offering a product many would have considered unthinkable a few short years ago.

Meanwhile, it is likely that external factors such as rising energy costs for commercial customers and higher living costs for domestic customers will also contribute to the sector's growth in the coming years as wine in a can becomes a truly affordable alternative to the perceived luxury of traditionally bottled wine.

In this report, we've examined the trends and factors that are shaping the market's movements and explored recent innovations in the sector, including the brands and products that are taking the market by storm.

We've also spoken with industry movers and shakers to examine the factors they believe have been responsible for the growth of canned wine, what has caused and enabled such rapid evolution, and where the challenges and opportunities for tomorrow are likely to lie.

Finally, we share our predictions and reveal what could be next for the market.

I hope you enjoy this report on one of the most interesting market segments in the sector today and that it proves useful for all stakeholders, from producers to brands, designers and retailers as we work to ensure consumers can continue to enjoy all the benefits cans offer, as well as the many high-quality wines now commonly available in cans.

"it is likely that external factors such as rising energy costs for commercial customers and higher living costs for domestic customers will also contribute to the sector's growth in the coming years."



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The RTD market, which includes a growing number of wine spritzers has gained huge traction in recent years – in fact it has grown faster than any other major drinks category² – while the global canned wine market is currently valued at £158.4 million and is expected to grow by more than 13% reaching £428.4 million by 2028³.

While the pandemic and associated social restrictions may already seem quite distant to many, those restrictions and the closure of the hospitality industry also contributed significantly to the continuing acceleration of the canned wine movement. And from £2.5 million in 2018, UK sales have soared, topping £10.7 million in 2020⁴.



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How the coronavirus pandemic affected consumer behaviour and perception towards canned wines

Inevitably perhaps, wine in a can was met with resistance for a number of years. Often associated with wines deemed to be inferior, it seemed unlikely that wine in a can could ever compete with the traditional bottle. And then, just as the less conservative US market began to illustrate the size of the opportunity, the pandemic brought a host of factors into play that would change the beverage market more fundamentally than any one other single event. Accelerating the gradual shift in perception of wine in a can that was already underway, the pandemic created dramatic changes in purchasing behaviour driven by a range of social restrictions and wider behavioural change.

Successive 'lockdowns', social distancing and the restrictions placed upon meetings between family and friends meant that for many, the opportunity to share one or more bottles of wine over dinner was no longer an option. At the same time, for those who might normally consume a glass or two, the 75cl bottle was suddenly too much for one person alone – likely to result in waste and an avoidable expense. In fact, according to Asda, 50 million litres of wine is wasted in the UK every year; the equivalent of £470

million being poured down the drain⁵.

As the social restrictions imposed during the pandemic eased, many people remained cautious, adapting their behaviour to minimise the risk of contracting coronavirus. A shared bottle presented a potential hygiene issue and means for the virus to spread.

Any alternative to the traditional bottle needed to offer a safe and hygienic solution as well as being more convenient for socially distanced occasions which by necessity were often outdoors. It also needed to address the issue of waste – both in terms of wasting the product and also, financial expense. The can was able to do all of these things, meeting demand for moderation, hygiene, and portability

as well as allowing individuals to try a variety of wines in single servings without committing to a bottle for each.

And crucially, the can did so without impacting negatively on taste. In fact as notable personalities including the likes of Olly Smith were soon reporting in the national media, consumers were finding that wine in a can could be every bit as good as from a bottle. Meanwhile, contemporary design ensured shelf standout and broad market appeal.

"...consumers found that wine in a can could be every bit as good as from a bottle..."

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With the imposition of the first 'lockdown' in 2020 and a population restricted to leaving the home only for exercise or other limited essential reasons, health and wellbeing – already rising on the agenda for large numbers of consumers – became the subject of renewed focus.

The knock-on effect of the rise of the health-conscious consumer saw the wine drinking population shrink, particularly among Gen Z and Millennials⁶.

Warning bells sounded for industry, one already suffering from the closure of the hospitality sector, but many brands quickly realised that the shift presented a new opportunity to tap into the no/low-alcohol market. Among the first of these, HUN became the first alcohol-free canned wine brand in June 2021.

This sector of the market will undoubtedly continue to grow as brands innovate, creating new products to meet the rising demand of more health-conscious consumers.

In parallel to the rise of the individual's well-being, the health of our planet has become an increasingly topical issue in recent years. Sustainability in general is increasingly important for consumers, impacting on all areas of our lives. It has become a buzz-word for those who want to make a positive choice for the environment and now influences purchasing decisions across the board, from staple foods to luxury goods, as well as the brands consumers wish to engage with.

Increasingly apparent is the consumers' desire to make an informed purchase, to understand the carbon

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"92% of respondents believe the way we treat our planet now will have a large impact on the future."

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footprint of the product being bought, whether it uses recycled materials and how easily it can be recycled after use, as well as the environmental credentials of the brand itself. Consumers expect brands to be environmentally conscious, and to share the responsibility of creating a better and greener future.

Ultimately though, we know that consumers don't want to be forced to choose between convenience and sustainability. According to research from Getty Images, which surveyed 10,000 people globally, 92% of respondents believe the way we treat our planet now will have a large impact on the future. Close to 50% also said however, that although they know they should care about the environment through their purchasing habits, convenience often takes priority.

The can has been able to demonstrate its virtues clearly when compared to other packaging formats.



Meeting both criteria, once again, the can has been able to demonstrate its virtues clearly when compared to other packaging formats.

Metals are natural elements that maintain their physical properties forever. This means metal is a permanent material. After use, metal products such as aluminium cans can be recycled, again and again, with no loss of quality. This is known as real recycling. The metal packaging and beverage can industry and its recycling stakeholders are committed to a real recycling society.

And while glass is also a permanent material, according to the 2018 LCA report by Gaia Consulting, the carbon footprint of a can is 2.5 times less than a traditional wine bottle⁷ which is unable to compete on convenience, from greatly reduced chilling time to portability. It's easy therefore, to see why wine in a can is increasingly appealing to the environmentally-conscious consumer.

UK Beverage can recycling rate 2021

82%

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The rapid shift rather than gradual evolution in behavioural and purchasing trends witnessed since the early stages of the pandemic, led to an unprecedented level of innovation in every industry.

The wine market has seen traditional brands adopting the can, if not entirely changing their packaging format, while new brands have launched exclusively in cans and targeted new demographics with unusual flavours and bold packaging designs. But it has also seen products pivoted to generate new demand and stimulate growth.



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The requirement for demonstrable sustainability credentials has ensured wine in a can has quickly found favour with an increasing number of consumers. The perception of wine in a can as an equal in quality to bottled wine, has taken time and inevitably there remains work to do to educate consumers and ensure the high quality as well as the variety of wines available in cans is more widely recognised.

The Copper Crew, a relative newcomer to the wine market was among the first to launch exclusively in cans. And it was more than the can's environmental credentials that supported the business case for doing so, according to co-founder, Oli Purnell. Selling a high-quality product, in a packaging format which meant their wine reached the consumer still tasting its best, was key.

"Sustainable practices are very important to us and being infinitely recyclable, the can was the obvious choice. But this was a considered decision and based on a variety of factors. Yes, there is also the element of social responsibility at play – cans offer portion control and at the same time, help to cut waste.

"On average, Brits throw away two glasses of wine every week – that's equivalent to well over 600 million bottles every year. That isn't good for anyone. Cans are also convenient, and as we say, our wines are not for the cellar, but everywhere else. Cans also chill quickly and they actually protect the taste of a good wine," Purnell commented.

The strong business case has seen The Copper Crew launch four wines to critical acclaim: a Chenin Blanc, Rosé, Merlot, and most recently a Sauvignon Blanc, all available in cases of six, 12 or 24, as well as mixed cases.

Image from google, may need supplying



"...The can is an obvious solution..."

Oli Purnell, The Copper Crew, co-founder

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A drink which had fallen from favour, often thought of as either old-fashioned or one to be saved for the festive period, or both, the pandemic proved to be a catalyst for driving growth in the market for sherry while its versatility has also seen consumers return to sherry as a base for modern cocktails.

Waiting in the wings to lead the market was Xeco, who set out in early 2016 to create a brand that put a contemporary spin on what was typically considered a timeworn product. Its range of sparkling sherry spritzer cocktails hit the shelves in 2021.

"No one was really giving sherry a facelift. The only way we were going to bring interest to new consumers was if we talked about it in a different way. We wanted to be a serious wine brand with serious wine credentials, but to think candidly more like a gin, where it was more about the serve and the occasion.

Not being too fixated on food and wine pairings, but much more about the versatility of sherry, both as a food loving wine, but also as a cocktail ingredient," commented Beanie Geraedts-Espey, Co-founder and Managing Director of Xeco⁸.

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"... We wanted to be a serious wine brand with serious wine credentials..."

Beanie Geraedts-Espey, Xeco, co-founder and managing director

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In the last two years, the market for wine in cans has grown so much, and their perception as a premium product shifted sufficiently, that brands from all segments of the beers, wines and spirits sector are broadening their range to include wine in cans.

Solid Ground Brewing, a company that had been producing award-winning beer in cans for more than a decade, was quickly recognised for offering similarly high-quality wine in cans following the launch of Solid Ground Winery, taking the International Canned Wine Competition Best of Show and Gold awards.

Sourced from local, high elevation vineyards in the Sierra Foothills and crafted in small batches in Diamond Springs, the canned wine range includes a Ria Sparkling Rosé Pinot Noir and Pingo Sparkling Pinot Grigio.

The business is now breaking new ground, pushing the boundaries of beer using winemaking techniques and using barrel aging techniques to blend wine into beer to create what it describes as harmonious hybrids.

On the decision to launch a wine in a can, Neal Banyard, Sales Director, commented: "I'd been talking about canning a wine since 2011, but back then I had to import a container of 275ml cans from Europe. It's become so easy now. I'm a winemaker by education and have been in the industry nearly all my working life, but I've always been annoyed how the wine industry overcomplicates things... I think the can is a good alternative to show people that you can put some really good stuff into other packaging styles than this archaic cork and bottle thing. It gives a great single-serve, and it also gives you a great way to drink wine in other places, for example, at the top of a mountain!"

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"...It gives a great single-serve, and it also gives you a great way to drink wine in other places..."

Neal Banyard, Solid Ground Brewery & Winery, sales director

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As the wine in cans movement gathers momentum, even the more traditional wine brands are now maximising the market's potential. Recently, the multi-award-winning rosé wine company, Mirabeau, expanded its portfolio to feature a premium quality wine in a can: Pret-a-Porter Rosé.

On its success, Archie Wright, co-founder of Glass Half Full, a sales and marketing partner for high-potential drinks brands including Mirabeau, commented: "The can format is something that Mirabeau were quick to see as an important market trend.

"Mirabeau are always at the forefront of the sector, so they were very quick to adopt the canned format. It's a much more sustainable packaging option. It's lighter, it's easier to transport and it's much more widely recycled, which is a big part of their business. I think it's also opened the rosé market in a completely different arena.

"This gets them into the grab-and-go fridges. It gets them into the RTD conversations. The cans themselves are very quick to chill. They're much less of a commitment to drink – if you want to open a bottle of rosé, then more often than not, you need to drink that in one, or at least two sittings amongst however many people you're opening it for. The can gives them that opportunity to just have a single drink, which is a real bonus. It also protects it from light damage, which is something that's quite exclusive to the rosé and other wine conversations. It's something that Mirabeau saw growing and were really keen to get behind."

"...The can gives them that opportunity to just have a single drink, which is a real bonus..."

Archie Wright, Co-founder,
Glass Half Full



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Recognising wine's traditional association with a more mature palate, an increasing number of brands are experimenting with new, bold flavours – a move which has paid dividends in the last year.

More than one in ten consumers aged 18-34 purchased wine in a can in the last six months of 2021 – three times more than for those aged 55+, and double that of the average UK regular wine drinker⁹.

Charles Overin, Head of marketing, brand and insights at Kingslands Drinks, a premier independent UK supplier of wine and spirits, believes the wine market can learn from other parts of the sector.

"Wine has lost a lot of consumers to the spirits category, especially gin, so creating a product that combines wine and gin in an RTD cocktail is providing them with an easy route into wine. These younger consumers tend to be hesitant to the wine category as they often don't understand it and as flavour and taste is so important to them, they don't identify with many products within the wine category which provide flavours they enjoy¹⁰."

"...a product that combines wine and gin in an RTD cocktail is providing them with an easy route into wine..."

Charles Overin, Head of marketing, brand and insights, Kingslands Drinks

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● Trending: Low & No

Hun Wines, the award-winning, self-proclaimed millennial canned wine brand, launched the first alcohol-free canned wine to enter the UK market in June 2021, playing to the rise of the health-conscious consumer. But it's not just the alcohol free options which have proved a hit and Hun's range includes a low-ABV 5.5% sparkling rosé, the brand positioning itself as an enabler for consumers who want to enjoy the morning after just as much as the night before – the 'wine between wines' choice.



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“...Canning in aluminium is another major sustainability move...”

Mark Satchwell, managing director,
Greencroft Bottling Company

● Pioneering technology

It's not just the wine producers and brands launching their products in cans that have played a key role in recent years. Those behind the scenes have been pivotal in the success of wine in cans. In 2019, Greencroft Bottling Company, one of the largest contract wine bottlers in the UK, invested over £2 million to launch the UK's first wine canning line.

The KHS Innofill Can C filler features a compact monoblock, valve manifold integrated into the frame, a hygienically designed filler carousel accessible for cleaning, disinfection and maintenance, an electromagnetic inductive flow metering for exact filling volumes, and hygienic flavour-resistant seals in the filling valve.

The move towards can production came about for sustainability reasons, according to managing director, Mark Satchwell, who said: "Canning in aluminium is another major sustainability move. Aluminium is a permanent material and it recycles forever; a beverage can could be back on the shelf in just 60 days¹¹."

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Michelle Kaufmann

Communications director at Stoller Wine Group, a celebrated family of wineries that includes Canned Oregon, a wine for every lifestyle:

Industry movers and shakers share their thoughts on all things canned wine – from barriers to entry to the drivers for the success of wine in cans, and offer their predictions for what might come next.

Industry opinion

Q: How has the can helped you to market your wine?

A: "We view our target as someone who cares as much about portability as they do quality and value. Initially, we thought this might be millennials, but what we're finding is that established fine wine drinkers who lead active and social lives like our product too. Time and place are essential factors in their buying habits."

Q: How is the wine market changing in your opinion?

A: "We believe the category will only continue to grow. Since we launched Canned Oregon in 2018, the market has experienced a massive proliferation of canned wines hitting the shelf. Almost every day, there is a new brand entering the category. We also believe packaging technology will continue to evolve. This is the new frontier of wine in many ways - the traditional rules for wine are off the table. From mixing your own wine-based cocktails to enjoying wine in the great outdoors, consumers are demanding it. And we are responding."



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Archie Wright

Co-founder and director at GHF Drinks, which represents a portfolio of drinks brands, including Mirabeau and its Pret-a-Porter Rosé canned wine:

Industry opinion

Q: Has the type of packaging brands are using, and the way people think about packaging, changed significantly since the pandemic?

A: The main one, and it's not necessarily exclusive to the premium end of the market, but it's obviously the environmentally friendly packaging you see in the supermarkets. The big beer companies have recently got rid of plastic rings, and packaging is now increasingly recycled, and people want to know that that process is happening. The other main thing is the link to the competitiveness of everything. Packaging has an increasingly important role in the buying process. It has to grab a consumers' attention off the shelf. It has to inform them and give them everything that they need to know about that product, whether it's the calories, ABV, ingredients, provenance. Then, it has to get them wanting to buy it, all without over-facing the customer, which is a real skill, and it's something that I think brands are really starting to put a lot of time and effort into."

Q: What do you think the future holds for wine in cans?

A: "I think we'll see more wine across the board in cans. The quality of both the cans and also the producers, we'll definitely see more red wine in cans. In terms of the other emerging things, you've got the hard seltzer, the emergence of CBD-infused drinks, which is huge in America, but we haven't yet seen the proper explosion of them in the UK market, but I think that's all coming. People learning to drink from the can format is going to mean that across the drinks industry, everyone will see the format as a big opportunity."

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Louisa Payne

Founder & director of Brixton Wine Club which began as a wine tasting group, eventually becoming a canned wine subscription business in response to the traditionally expensive wine subscription market and associated waste:

Industry opinion

Q: How do you believe the canned wine market has learned from other sectors?

A: "I think the canned wine trend is really similar to the craft beer market. Everything from the marketing to the labels, is made to start out from the traditional wine market. Customers are more interested than ever before about who is making the product they are consuming, where it is coming from, and what's in the 'tin'. Independently owned and 'artisanal' products are in favour, instead of the mass-produced products owned by big businesses."

Q: What challenges do you think the canned wine market will face in the future?

A: "One big challenge ahead is continuing to change customers' mindset on both the quality of the wine and the occasion for drinking it. Canned wine has had a bit of a bad reputation in the past, but this has changed enormously in the past two years. The nature of cans means they are portable, but they don't just need to be for summer picnics - cans are for the everyday. Another potential challenge is the positioning of canned wines in the market. I imagine there is immense pressure from supermarkets to keep canned wine costs low to fit into their pricing structure of other canned and RTD products."

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There is little doubt that the future looks bright for wine in cans. While it may have been a relatively short-term crisis which provided the catalyst for the category's growth, the can's virtues meet longer term needs of stakeholders throughout the value chain and offer the kind of adaptability that will be key in the years ahead.

In the more immediate post-pandemic restriction free future, the return of festivals and many other events to the public calendar is likely to see a notable boom in the canned wine as well as wider RTD market as consumers seek stylish, high quality but affordable and convenient as well as sustainable products.

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Drinks researcher, Wine Intelligence, predicts that low alcohol canned wines including RTDs will be one of the key upcoming markets in 2022, with sales forecast to rise to 31% by 2024¹². It's likely the health and well-being trend will continue, particularly among younger consumers.

Brands looking to appeal to Gen-Z and Millennials will therefore undoubtedly broaden their product range to encompass new low/no-alcohol drinks as well as adapting established offerings for those consumers abstaining or actively moderating their alcohol consumption.

Louisa Payne, founder and director of Brixton Wine Club also predicts more development in the low and non-alcoholic sector and significantly, expects to see a greater number of lesser-known grape varieties being canned too.

While some wine brands will purposely diversify and vary their range, some may find there are few alternatives but to do so as a result of climate change and more extreme weather events affecting the principle wine producing regions.

The proliferation of wildfires in Australia and Southern Europe for instance has caused substantial damage to infrastructure and vineyards. The impact in some cases is considerable and production will be affected significantly.

Meanwhile, Pernod Ricard's UK Commercial Director, Ian Peart believes that retailers want more disruptive packaging and products, which effectively creates greater licence for brands to experiment with new flavours, as well as creating increasingly bold, standout designs, particularly given the advances in printing technology which means what was unthinkable a decade ago, is already commonplace.

Canned wine as an affordable alternative

Affordability is already a key issue. The rising costs of energy, materials and distribution are affecting companies in every industry as well as the end consumer and it is inevitable that wine brands will be among those seeking to identify cost savings throughout the supply chain. Consumers, facing a reduction in disposable income, are likely to reduce expenditure on luxury items.

Once again, the can's virtues mean it is well positioned to help businesses reduce their packaging and distribution costs while offering a high-quality product to the consumer at a more accessible price point, and in smaller quantities.

Despite the challenges which the coming years will bring, the barriers which have previously limited

growth in the wine sector are tumbling and it's clear there are significant opportunities for wine producers, brands, retailers, manufacturers, and packaging designers willing to embrace and adopt the can.

It is extremely unlikely that wine in a can will ever wholly replace bottled wine. And yet, delivering premium quality, convenience, and sustainability while meeting the needs of a wider demographic than ever before, there is little doubt that growth for wine in cans is a given. And so, it remains to be seen just what the eventual split in market share will be and whether Generation Alpha will follow the example set by Millennials and Generation Z, who have so convincingly adopted the can for all occasions.



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The Can Makers is the trade body representing drinks can manufacturers in the UK. Members work together to promote the benefits of the drinks can and aid communications between the industry and its customers: the brewers and soft drinks manufacturers and the retailers, as well as the packaging industry, the media and consumers.

The Can Makers was the first organisation in Europe formed to promote drink cans, and is part of the Metal Packaging Manufacturers Association (MPMA), which represents the UK metal packaging industry.

For more information, please visit: www.canmakers.co.uk.