

## THE SUSTAINABLE WINE MARKET IN EUROPE – INTRODUCTION TO A MARKET TREND AND ITS ISSUES

Małgorzata Pink

University of Agriculture in Krakow

**Abstract.** The wine market in EU had changed, and in general, wine consumption decreased. New trend can be however observed in terms of production and consumption of organic wines. The aim of the article is to analyse the wine market in EU, regarding organic products and to evaluate the social significance of the growing popularity of organic wines. The survey was conducted basing on the analysis of data on the volume of production and sales of conventional and organic, statements and still ongoing focus group conducted with Austrian and Italian organic winemakers. The results are confirming growing popularity of organic production, but also are showing some problems in the matter of terminology, eco-labelling and naming the organic wines, which seems to arise from a change of the paradigm of entrepreneurial actions and ceding from the assumptions of profit and efficiency maximization, to greater care about sustainable development and quality.

**Key words:** wine market, organic wine, biodynamic wine, natural wine, eco-labelling

*So many poisons are employed to force wine to suit our taste – and we are surprised that it is not wholesome!*

Pliny the Elder, Natural History, Book XIV, 130

### INTRODUCTION

The aim of the article is to provide an overview of the phenomenon of organic products on the wine market. In Europe, the consumption of a conventional wine is gradually declining, as is the area of vine plantation. This problem does not concern organic winemakers, as the numbers in terms of plantation, production and consumption of organic vines and wine are on the rise. The popularity of organic products can be associ-

---

Corresponding author: Małgorzata Pink, Institute of Economic and Social Science, University of Agriculture in Krakow, al. Mickiewicza 21, 31-120 Cracow, Poland, e-mail: m.pink@ur.krakow.pl

© Copyright by Warsaw University of Life Sciences Press, Warsaw 2015

ated with the EU policies, but also with a change of social values<sup>1</sup>. Organic wine is also a source of concern, as the EU regulations were defined only in 2012, and turned out to be not quite restrictive, from point of view of some winemakers. Organic wine market existed well before the 2012 and this resulted with a creation of many private certification systems. Another problem comes from a naming of types of products, as the terminology is not always clear and consistent. Sustainable production is then an ethical issue, which will be discussed in the further part of this paper.

## MATERIAL AND METHODS

The present study is an analysis of the chosen trends on European wine market. The time horizon of the study, covers a period 2000–2013. However, due to diversity of the sources, not all collected data refers to exactly the same period. The access to the data concerning organic wine was particularly problematic issue, because of a confusion on the definition of a different kinds of wines, but also because of the fact the market of organic wine is just emerging. In terms of the geographical area, a focus is on the EU countries market. The study is basing mainly on the raw data introduced by United States Department of Agriculture, Research Institute of Organic Agriculture (FiBL), Eurostat, and Centre for the Promotion of Imports from developing countries (CBI), which is Agency of the Ministry of Foreign Affairs of the Netherlands, as well as on secondary analyses of International Organisation of Vine and Wine, International Federation of Organic Agriculture Movements and other institutions supporting organic wine production and trade, as well as statements from organic, biodynamic or natural winemakers and natural wine importers gathered during still ongoing focus research.

## RESULTS

### The wine market in Europe

Europe is the largest wine producer in a world and delivers 60% of global production. It also occupies first place in terms of vine growing areas, as almost every second vine grows in Europe. For years, the biggest wine producer was France, but it has recently lost its dominant position to Italy and Spain. Table 1 presents the volume of wine production in the leading EU countries over the period from 2007 to 2013/2014.

Wine production is dominated by France, Italy and Spain, although it is also worth mentioning some of the countries with smaller production, who are just entering the market, like England, with its very well-respected fine sparkling wines, whose production

---

<sup>1</sup> A concept that seems to be especially appropriate is that of post-materialistic value orientation described by R. Inglehart in 1977, where the focus shifts to self-expression and quality of the life rather than physical and economic security. The Author is referring to political change as an overall phenomenon, but the syndrome of post-materialism is also suitable to describe individuals' behaviour.

Table 1. Trends in wine production in the EU-27 countries (thousand hl)

Country	2007	2008	2009	2010	2011	2012	2012/ /2013	2013/ /2014
France	45,672	41,640	46,269	45,669	50,757	40,609	40,609	44,100
Italy	42,514	46,245	45,800	46,737	42,705	39,300	40,057	44,900
Spain	36,408	35,913	36,097	35,363	33,397	31,500	31,123	44,600
Germany	10,261	9,991	9,228	6,906	9,132	8,903	9,000	8,500
Portugal	6,074	5,620	5,872	7,133	5,610	5,857	6,140	6,740
Romania	5,289	5,159	6,703	3,287	4,213	4,059	4,100	5,400
Greece	3,511	3,869	3,366	2,950	2,750	3,150	3,150	3,700
Austria	2,256	2,628	2,672	2,352	1,737	2,815	2,243	2,450
Hungary	3,222	3,460	3,198	1,762	2,750	1,874	2,155	2,252
Other EU-27 countries <sup>a</sup>	3,853	3,604	3,034	2,616	3,177	2,773	2,558	4,911
EU-27/28	159,060	158,129	162,238	154,775	155,671	140,840	141,135	167,553

<sup>a</sup> The data in the first six columns do not take Croatia into account.

Source: USDA Foreign Agricultural Service, GAIN Report Number: IT1307, Wine Annual Report and Statistics 2013 and USDA Foreign Agricultural Service, GAIN Report Number: IT1414, Wine Annual Report and Statistics, 2014.

in the period 2005–2012 was around 22,000 hl (Eurostat database) on average, or Central European producers, like the Czech Republic (especially Moravia), where in 2012, the total volume of wine production amounted to 650,000 hl or Slovakia with 325,000 hl in 2013 (Eurostat database). In Poland, which is a new player in a wine industry, in 2009/2010, the level of production stood at 412.49 hl; 2010/2011 – 437.10 hl; 2011/2012 – 428.40 hl; 2012/2013 – 898.25 hl; while in 2013/2014, it amounted to 1978.95 hl [Burkot 2014]. Despite of above, interestingly, the area of plantation of vines in Europe as a whole is successively decreasing, as is shown in Figure 1.

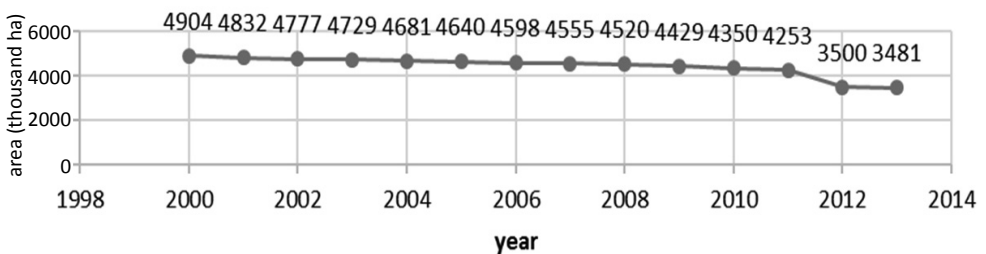


Fig. 1. Vine growing area in Europe (total) 2000–2013

Source: Own work, based on statistics from the International Organisation of Vine and Wine (<http://www.oiv.int/oiv/info/enstatoivextracts2>, accessed: 04.11.2014).

In terms of consumption of wine, most of the countries in the EU also reported a distinctive decline in volumes. The figures showing wine consumption per capita in 2012 and the percentage change in consumption since 2009 are presented in Table 2.

Table 2. Wine consumption per capita (litres) in 2012 and percentage change in consumption 2009/2012

Country	Litres per capita	Percentage change	Country	Litres per capita	Percentage change
France	44.19	↓4	<b>UK</b>	<b>20.19</b>	<b>↑0.4</b>
<b>Slovenia</b>	<b>43.27</b>	<b>↑15.2</b>	Hungary	20.18	↓20.4
Croatia	42.59	↓12.2	Bulgaria	20.18	↓2.4
Portugal	40.93	↓2.3	Czech Republic	19.50	↓8.1
Italy	37.54	↓4.6	<b>Slovakia</b>	<b>15.36</b>	<b>↑8.4</b>
Austria	31.87	↓1.7	Cyprus	13.97	↑6.5
Greece	28.15	↓6.8	Denmark	12.22	↓13.1
<b>Latvia</b>	<b>26.36</b>	<b>↑54.5</b>	<b>Luxembourg</b>	<b>9.50</b>	<b>↑3.1</b>
Belgium	24.00	↓15.4	Sweden	6.69	↓8.6
Germany	23.98	↓3.6	Ireland	5.24	↓24.4
<b>Romania</b>	<b>23.80</b>	<b>↑41.2</b>	Finland	4.54	↓24.4
<b>Malta</b>	<b>23.67</b>	<b>↑2.1</b>	<b>Estonia</b>	<b>2.93</b>	<b>↑38.7</b>
Spain	21.47	↓10.4	<b>Lithuania</b>	<b>0.1</b>	<b>↑31.1</b>
<b>Netherlands</b>	<b>21.09</b>	<b>↑2</b>	<b>Poland<sup>a</sup></b>	<b>2.05</b>	<b>↑14</b>

<sup>a</sup> Data for Poland refers to the year 2010 and the change between 2007 and 2010.

Source: Per capita wine consumption per country 2009–2012 and % change 2012/2009, litres per capita, [http://www.wineinstitute.org/files/2012\\_World\\_Per\\_Capita\\_Consumption\\_by\\_Country\\_cCalifornia\\_Wine\\_Institute.pdf](http://www.wineinstitute.org/files/2012_World_Per_Capita_Consumption_by_Country_cCalifornia_Wine_Institute.pdf) and Per Capita Wine Consumption by Country – ranked by per capita consumption 2007–2010 and % change 2010/2007, litres per capita, [http://www.wineinstitute.org/files/2010\\_Per\\_Capita\\_Wine\\_Consumption\\_by\\_Country.pdf](http://www.wineinstitute.org/files/2010_Per_Capita_Wine_Consumption_by_Country.pdf) (accessed: 20.11.2014) and <http://www.wineinstitute.org/resources/statistics> (accessed: 20.11.2014).

A consumption per capita is falling in most of the countries, especially among the traditional wine drinking countries, however, a significant increase in interest in wine consumption can be seen among the new member states. The EU continues to be the biggest importer of the wine in the world, with the numbers increasing from 7,992,000 hl in 2011 to 8,520,000 hl in 2012 and 8,629,000 hl in 2013; with the biggest quantity coming from Chile, South Africa, Australia and the USA. And, despite the decrease in the volume of exports, the EU is still the largest exporter in the world: in 2011 – 22,525,000 hl worth \$11,238 million, in 2012 – 22,293,000 hl worth \$11,355 million and, in 2013 – 18,799,000 hl worth \$10,960 million [USDA Foreign Agricultural Service, GAIN Report Number: IT1414, Wine Annual Report and Statistics 2014].

The wine market is changing, not only in terms of its structure, but also due to new trends, one of which is the production and consumption of organic wine. In a contrast to the general tendency towards shrinkage of the area of land planted with vines, the area of organic vineyards and the proportion of the share of organic grape in the total grape area

is growing and those trends are shown in Figure 2. In 2011, the UK had the biggest share of organic grapes to total grape area with 16.7%, followed by the Netherlands with 14.6%, Belgium with 10%, Austria with 9.5%, France with 8%, Spain with 7.9%, Italy with 7.3% and Germany with 6.9% [FiBL and IFOAM, The World of Organic Agriculture. Statistics and Emerging Trends 2013]. Unfortunately, there is little evidence to illustrate the changes on national wine markets. Firstly, this is because organic wines were defined in the European Union only in 2012, secondly because there are many smaller producers, who work without EU certification, producing organic wines, and thirdly, because there is a whole range of certifications for organic wine, and following their distribution is at the moment impossible. However, even with incomplete data about the sale and consumption of organic wines, it can be seen that it is a growing market.

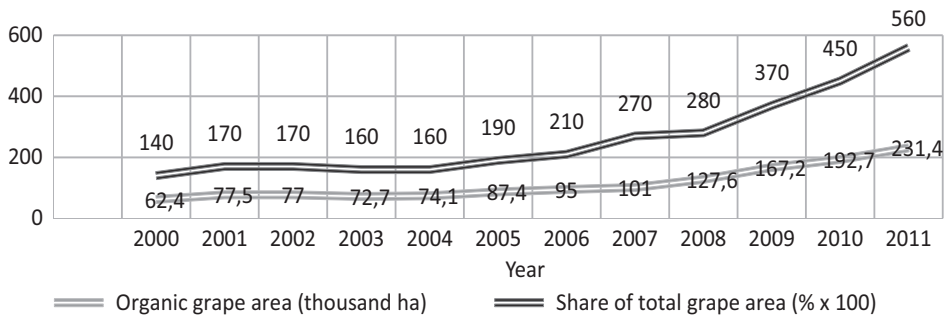


Fig. 2. Organic grape area and the share of organic grape area in total grape area in 2000–2011

Source: FiBL and IFOAM, The World of Organic Agriculture. Statistics and Emerging Trends 2013, [www.fibl.org/fileadmin/documents/shop/1606-organic-world-2013.pdf](http://www.fibl.org/fileadmin/documents/shop/1606-organic-world-2013.pdf) (accessed: 01.12.2014) and <http://orgprints.org/25258/1/willer-2013-wine.pdf> (accessed: 01.12.2014).

The biggest markets for organic wine in the EU are France, Germany, Italy, the United Kingdom and Austria. The organic wine market in France was worth €413,000,000 in 2012 with growth of 15% compared to 2011 and 28% compared to 2010<sup>2</sup>. The German market was worth €198,000,000 in 2012 and has seen growth of 14% since 2011 and, like in France, 28% since 2010. In terms of a value, organic wines account for a 6% share of the market (4.5% in terms of quantity), excluding restaurant consumption and direct sales. In the UK and Italy, organic wines account for around a 2% share of the total wine market [FiBL and IFOAM, The World of Organic Agriculture. Statistics and Emerging Trends 2013]. The UK’s organic wine market grew 42% between 2007 and 2008, and the same trend is expected to continue up to 2014<sup>3</sup>. As for Italy, the volume of organic wine consumed in 2012 grew by 4%. In March 2013, 2% of Italians declared they had drunk organic wine compared to 11.6% in March 2014<sup>4</sup>. Distinctive growth has been noted in

<sup>2</sup> These figures exclude consumption in restaurants.

<sup>3</sup> CBI Market Information Database website [www.cbi.eu/system/files/marketintel/2011\\_Trends\\_for\\_wine\\_in\\_Denmark.pdf](http://www.cbi.eu/system/files/marketintel/2011_Trends_for_wine_in_Denmark.pdf) (accessed: 10.12.2014); [www.cbi.eu/system/files/marketintel/2011\\_Trends\\_for\\_wine\\_in\\_the\\_United\\_Kingdom.pdf](http://www.cbi.eu/system/files/marketintel/2011_Trends_for_wine_in_the_United_Kingdom.pdf) (accessed: 10.12.2014).

<sup>4</sup> Winemonitor Nomisma Press Release: [www.winemonitor.it/images/PDF/CS%20Wine%20Monit%20or%20Nomisma%20Bio%20EN.pdf](http://www.winemonitor.it/images/PDF/CS%20Wine%20Monit%20or%20Nomisma%20Bio%20EN.pdf) (accessed: 20.11.2014).

Sweden, where in the first half of 2010, Systembolaget, the State-owned alcohol trade monopolist, reported a 20% increase in the private sales of organic wines<sup>5</sup>. Similarly, in Denmark, consumers were more concerned about sustainability, with an increase of 35%<sup>6</sup> seen in the sales of organic wine, beer and cider between 2008 and 2009. Another country with a distinctive niche market for organic wine was Switzerland, where the volume of organic wine production was growing at a rate of 5% yearly, and still 57% of organic wine sales came from imports. The Swiss consume 23,000 hl of organic wine yearly, which corresponds to 0.8% of total wine consumption. The growing trend can be observed from the point of view of the increasing number of specifically organic wine fairs, which are no longer just meetings for a group of eccentric outsiders. The biggest of these are RAW, La Dive Bouteille, À Caen le Vin, Buvons Nature, Millésime Bio, Festivin, H2O Vegetal, Les Vins Cochons, Les Affranchis, Real Wine Fair, Rootstock, Salon de Vins Anonymes, Vini Circus, Vini di Vignaioli, not to mention a whole host of other special shows for organic wines at regular wine fairs or local fairs.

Even that organic wine market is still a niche, the dynamics of its growth, or what we can genuinely refer to as the “organic wine boom” continues unabated, and, together with natural and ecological trends in consumption and behaviour, cannot be seen to be just a short-term fashion, but rather a new attitude to market realities.

### **Troubles with the definition and understanding of organic wine**

One of the main reasons why there is so little clear and consistent evidence of the production and consumption of organic wine are down to problems with definition of the concept. As a matter of fact, a formal definition of organic wine has existed in the EU since 8 March 2012, when the rules for organic wines were implemented. Until that time, a wine made in a way that is more natural than mass production could have only been designated as a “wine made from organic grapes”, which does not necessarily mean, it was vinified in an organic way. What does organic wine actually then mean? According to EU regulations, organic wine must be made out of organic ingredients, and the cultivation of organic grapes was described in Regulation (EC) 834/2007 and 889/2008. Apart from the use of organic ingredients manufacturing of the wine cannot be carried out using certain oenological processes used in the production of conventional wine<sup>7</sup>. These include the following methods and processes, listed in the EU Rules for Organic Wine Production: “partial concentration through cooling, elimination of sulphur dioxide by physical process, electro dialysis treatment to ensure the tartaric stabilisation of the wine, partial dealcoholisation of the wine, treatment with cation exchangers to ensure the tartaric stabilisation of the wine, physical methods allowed in regulation (EC) No 144/2013, like nano or ultrafiltration, as well as coupled membrane procedures, in heat treatments, the temperature shall not exceed 70°C and the size of the pores for centrifuging and filtration shall not be smaller than 0.2 micrometres” [Szeremeta 2014].

---

<sup>5</sup> [www.concealedwines.com/page.asp?pageID=2767](http://www.concealedwines.com/page.asp?pageID=2767) (accessed: 10.12.2014).

<sup>6</sup> See reference notes 3.

<sup>7</sup> Oenological practices and methods suitable for conventional wine are described in Regulations (EC) 1234/2007, 606/2009 and 607/2009.

As for the substances permitted in organic wine production, the list is distinctively shorter than that of the substances and additives permitted in conventional wine production. Still though, an organic wine does not necessarily mean just fermented grape juice and nothing else, as there are quite a few substances permitted for use in manufacturing of the wine, for example: concentrated must, rectified concentrated must, sucrose, yeast cells, active dry yeast, fresh yeast in suspension, edible gelatine, plant proteins from wheat and peas, isinglass, egg white albumin, gum arabic and tannins [Szeremeta 2014]. All substances used should be organic, if possible. Organic wines should have a limited amount of added sulphites. In a dry red wines, 100–170 mg/l of SO<sub>2</sub><sup>8</sup> is permitted, whereas in conventional red wines it is 150–200 mg/l. In the case of dry, white or rosé wines, the figures are 150–220 mg/l and 200–250 mg/l of SO<sub>2</sub> in conventional wines. For dry wines, the reduction in sulphites corresponds to around 12–33%, while for special wines, liqueurs wines or sparkling wines, there is a decrease in the level of added sulphites of around 7.5–20%.

The rules for the production of organic wine are not over-restrictive, and because of wide range of permitted practices, two products labelled as “organic” can be quite different. The legislative process is however still ongoing and the existing arrangements will be revised in 2015. In the view of the EU, organic wines are those that comply with the aforementioned standards, though in practice, on the market, among the producers and consumers, the definitions are not so obvious. Apart from organic wines, described above, there is also a segment of biodynamic wines, made according to the rules set out by Rudolf Steiner in 1924<sup>9</sup>, and finally a segment of natural wines<sup>10</sup>. Vinification of this kind of wine goes further than applying the rules of organic or biodynamic manufacturing, choosing distinctively more restrictive methods of production, where organic grapes (planted according to Regulation (EC) 834/2007) is just a first step and the following principles are applied: “manual harvesting, yeasts exogenous to the grape and the wine are prohibited, no oenological additives except SO<sub>2</sub> with a total maximal SO<sub>2</sub> as follows: 30 mg/l in red and sparkling wines, 40 mg/l in dry white wines, 80 mg/l in white wines over 5 g/l of residual sugar; and minimal intervention on vinified wines” [Tuz 2010]. The issue is how the consumer is supposed to know what is he consuming? This is where the role of eco-labelling and certification comes in. Table 3 lists some of the labels used to identify wines produced in an organic, biodynamic and/or natural way, along with some of the criteria for obtaining certification.




---

<sup>8</sup> Depending of the level of residual sugar in a wine, where a higher level of residual sugar means the producer is entitled to use a higher amount of SO<sub>2</sub>.

<sup>9</sup> The definition of biodynamics according to J.R. Reeve, L. Carpenter-Boggs, J.P. Reganold, A.L. York, G. McGourty, L.P. McCloskey: “Biodynamics is a holistic approach that emphasizes soil building and high diversity of crops, animals, and wildlife habitat; therefore, inputs from outside the farm are minimized and use of on farm resources is optimized. In addition, biodynamic practitioners use a series of fermented manure, plant, and mineral-based preparations on soil, crops, and compost. These substances are not claimed to act as fertilizers but are said to stimulate soil nutrient cycling and promote photosynthesis and optimal compost development”. The authors proved, *inter alia*, that biodynamic treatment of vines resulted in grapes with significantly higher Brix and notably higher total phenols and total anthocyanin.

<sup>10</sup> Market synonyms are: raw wine, naked wine, real wine, low intervention wine, additive-free wine.

Table 3. Wine eco-labelling in Europe

Eco-label/ /certification	Category of wine	Area	Description of chosen criteria
	organic <sup>a</sup>	EU	May contain no more than 100–220 mg/l of SO <sub>2</sub> <sup>b</sup> and the following additives and substances may be used during the vinification process: citric acid, L-ascorbic acid, L(+) tartaric acid, lactic acid, metatartaric acid, egg albumin, lactic bacteria, bentonite, potassium bisulphite, potassium metabisulphite, potassium bicarbonate, calcium carbonate, potassium caseinate, casein, oenological coal, copper citrate, fish glue, thiamine hydrochloride, silica gel, yeast cell, gelatine, gum arabic, DAP, potassium hydrogen, dry active yeast, vegetable proteins of wheat and peas, oak wood flakes, concentrated must, concentrated rectified must, pectinases, sucrose, copper sulphate, oenological tannins, potassium tartrate
	biodynamic	International <sup>c</sup>	May contain no more than 70–90 mg/l of SO <sub>2</sub> and the following additives: egg albumin, bentonite, oenological carbon, sucrose. Must be made of Demeter-certified biodynamic grapes
	biodynamic	France	May contain no more than 80–135 mg/l of SO <sub>2</sub> <sup>d</sup> . Wine from biodynamic grapes
AVN – L'Association des vins naturels	natural	France	May contain 30–40 mg/l of SO <sub>2</sub> . Wine from organic grapes
S.A.I.N.S.	natural	France	Does not contain any additives, only natural traces of SO <sub>2</sub> . Wine from organic grapes

<sup>a</sup> This list is not exhaustive in terms of the organic, biodynamic and natural certification in Europe.

<sup>b</sup> Refers to dry and semi-dry white and red wines.

<sup>c</sup> Standards for Demeter certification vary between different countries, even it is an international organisation, the rules differ in certain details.

<sup>d</sup> Refers to dry and semi-dry white and red wines. The highest category refers to wines with an extended ageing period – of more than 9 months.

Source: [www.vinsnatureles.fr](http://www.vinsnatureles.fr) (accessed: 12.11.2014).



Organic certification is based on EU regulations, as well as on certification by private bodies, such as the different international branches of Demeter<sup>11</sup>, the French certification body Biodyvin, or the German certification body Ecovin, and national standards issued by the FNIVAB in France, Bioaustria, Bio Suisse, the Italian CCPB and many others<sup>12</sup>. Understanding the difference between organic, biodynamic and natural wine, can be problematic for winemakers themselves. From the point of view of many winemakers, who have gone to the lengths of obtaining official organic certification, natural winemakers, who often shun or have given up on any attempts to introduce eco-labelling for their products, pose a threat and cause confusion for customers. Jem Gardener, managing director of Vinceremos<sup>13</sup>, says: “I’m worried that ‘natural’ might undermine the progress made by organic wines by muddying the waters. There appears to be no clear definition of what they are but there seems to be an implication that they are ‘better than’ organic”<sup>14</sup>. Conversely, from point of view of some natural winemakers, the introduction of the new EU regulations in 2012 has often been seen as a way of make organic wine production more mass. All of the above can result in confusion for consumers, as can the fact that many natural winemakers simply do not wish to seek any kind of certification. Some associations of natural wine producers, such as the ‘L’ Association des vins naturels’ simply being based on trust, as a their Preamble says: “There are no in-house controls; the present Code of good practices, based on trust, shall be signed by the entire membership without exception” [Tuz 2010]. This kind of attitude can be of great value, introducing the notion of a community<sup>15</sup> and trust amongst producers. However, it also opens up leeway for possible abuses or unauthorized usage of what is in any case just an informal term “natural wine”.

---

<sup>11</sup> It is worth noting that Demeter standards for wine production vary between different countries. For example, German branch of Demeter permits the usage of endogenous yeasts, and while Demeter in the USA or Austria only permit indigenous yeasts.

<sup>12</sup> From the point of view of the consumer, knowing that a wine producer belongs to certain associations, such as the association of producers VinNatur, or the growers association La Renaissance des Appellations, is has important cognitive and informative value. The standards expected by different organisations differ considerably, mainly from point of view of amount of permitted SO<sub>2</sub> that may be added but also with regard to the such questions as “the use of K metabisulphite and K bisulphite; correction of N deficiency in the musts: principle of correction and type of additives, with different positions on N salts use (Diammonium phosphate, Ammonium sulphate, Ammonium sulphite, Ammonium bisulphite) or other agents stimulating the growth of yeasts (Thiamine and yeast cell walls); Deacidification: nature of substances to be used for; Clarification: use of gelatine, betaglucanase enzymes, tannins and potassium caseinates; Reduction of taste defaults: use of Copper sulphate; Alternative practices to Sulphitation for unstable sweet wines: physical treatments like flash pasteurization and reverse osmosis” [www.online.org/intranet/libretti/meunier-regulator-ryen\\_219\\_01\\_0\\_.doc](http://www.online.org/intranet/libretti/meunier-regulator-ryen_219_01_0_.doc) (accessed: 05.11.2014).

<sup>13</sup> Vinceremos is a major wine importer in UK, specialising in organic wines.

<sup>14</sup> [www.jancisrobinson.com/articles/organic-producers-fret-over-natural-wine](http://www.jancisrobinson.com/articles/organic-producers-fret-over-natural-wine) (accessed: 12.11.2014).

<sup>15</sup> Winemakers must be active and cooperate within the AVN.

## ETHICAL ISSUE IN WINE PRODUCTION

The growing popularity of organic food and drink products is a trend that can be seen worldwide, though 96% of the demand is concentrated in North America and Europe. Over a 10-year period (1999–2011), the value of the organic food market tripled [Kwasek 2013]. In the EU, the value of the market for organic products grew from 10.2 billion euro in 2004 to €20.9 billion in 2012 [Willer et al. 2014]. It seems to be more than just a fashion, but a mental change of producers and for customers. Amongst the factors standing behind such growing demand, one can indicate better awareness of health issues, food safety, increased awareness of the environmental, credibility and media interest. These are all important reasons, and conventional wine may not be able to meet the demands of the consumers who are choosing to subscribe to such values. When buying wine, people expect buying fermented grape juice, as a definition of wine according to EU regulations (Annex I, Regulation 1493/1999) says: “Wine: the product obtained exclusively from the total or partial alcoholic fermentation of fresh grapes, whether or not crushed, or of grape must”, in conventional wine though, they may be getting much more than that. Of course, permitted additives<sup>16</sup> are not poisonous, in small amounts, but they can cause allergic reactions<sup>17</sup>, lack of information on labels can also be a problem for vegans or vegetarians, as permitted substances such as isinglass or gelatine are animal products. A consumer has no information about the additives contained in the product, except SO<sub>2</sub>, the amounts of which can vary considerably in different wines, which is also not shown on the label, and without this knowledge, it is not possible to make an informed decision.

## CONCLUSIONS

Organic, biodynamic, natural – in general – sustainable wine market in EU is growing despite rather negative changes observed on the conventional wine market. Being still a niche, the new trend is important from an ethical and sustainable development point of view and those issues manifest themselves at several levels – the growing number of organic, biodynamic or natural wineries is of course a result of EU policy, but is also proof of a change in the mind-set of winemakers returning to traditional, less invasive methods, at the cost of lower efficiency. The growing segment of consumers of organic wines is proof a heightened awareness of the issue of sustainable consumption and the importance of “consuming consciously”. Natural winemaking is often based on trust, with biodynamic producers creating real social networks to support and observe each other’s methods and ensure proper quality of the final product. Those are values which are crucial for social capital. At the same time, institutions are also faced with ethical issues, as it is the authorities concern to ensure that they provide the frameworks

---

<sup>16</sup> A list of oenological processes and additives permitted in a wine production in EU is mostly included in Annex IV and V of EC Regulation 1493/1999, with further specifications given in EC Regulation 1622/2000.

<sup>17</sup> For example egg albumin.

for clear information to be provided to consumers, so they can choose a product in a knowledgeable and informed manner. The principle of displaying the composition of a product and nutritional facts is very well developed in terms of food and non-alcoholic beverages, so why should it not also be introduced on the alcoholic beverages market, where it would not only be convenient for consumers, but also for producers promoting their product as natural or organic too.

## REFERENCES

- Burkot, P. (2014). Rynek wina w Polsce, Biuletyn Informacyjny ARR, 2.
- Inglehart, R. (1977). *The Silent Revolution: Changing Values and Political Styles Among Western Public*. Princeton University Press.
- Kwasek, M. (red.) (2013). *Z badań nad rolnictwem społecznie zrównoważonym, (21) Żywność ekologiczna – regulacje prawne, system kontroli i certyfikacji*. Instytut Ekonomiki Rolnictwa i Gospodarki Żywnościowej. Państwowy Instytut Badawczy, Warszawa.
- Reeve, J.R., Carpenter-Boggs, L., Reganold, J.P., York, A.L., McGourty, G., McCloskey, L.P. (2005). Soil and Winegrape Quality in Biodynamically and Organically Managed Vineyards. *American Journal of Enology and Viticulture*, 56(4), 367–376.
- Szeremeta, A. (2014). EU Organic Wine Making Rules. [In:] *EU Rules for Organic Wine Production*, IFOAM EU Group, Brussels, Belgium.
- Tuz, M. (2010). *Guide des vins naturels dans le monde*. Jean-Paul Rocher éditeur, Paris.
- USDA Foreign Agricultural Service, GAIN Report Number: IT1307, *Wine Annual Report and Statistics 2013*.
- USDA Foreign Agricultural Service, GAIN Report Number: IT1414, *Wine Annual Report and Statistics 2014*.
- Willer, H., Lernoud, J., Schaack, D. (2014). *The European Market for Organic Food*. FiBL, Biofach. Retrieved from: <http://www.biofach.fibl.org/fileadmin/documents/de/news/2014/willer-schaack-2014-biofach-europe-market.pdf> (accessed: 12/11/2014).

## RYNEK ZRÓWNOWAŻONEGO WINIARSTWA W EUROPIE – NOWY TREND RYNKOWY I JEGO WYBRANE PROBLEMY

**Streszczenie.** Rynek wina w Europie ulega w ostatnich latach znaczącym przemianom. Spada konsumpcja wina w krajach winiarskich, wzrasta zaś w tych, które tradycyjnie do tego grona nie należały. Innym trendom podlega zaś produkcja i konsumpcja szeroko rozumianych win ekologicznych. Celem artykułu jest analiza rynku wina w Europie w kontekście produktów ekologicznych oraz ocena społecznego znaczenia rosnącej popularności win ekologicznych. Badanie przeprowadzono na podstawie analizy danych dotyczących wielkości produkcji i sprzedaży wina konwencjonalnego i ekologicznego oraz deklaracji z wywiadu fokusowego przeprowadzonego z producentami wina ekologicznego. Wyniki badań potwierdzają rosnącą popularność ekologicznych upraw i produkcji zarówno wśród wytwórców wina, jak i konsumentów. Ukazują jednak również pewne problemy w zakresie terminologii dotyczącej istoty, eko-znakowania i nazewnictwa win ekologicznych, których natura wydaje się wynikać ze zmiany paradygmatu działania przedsiębiorcy i odejściu od założeń maksymalizacji zysku i zwiększania efektywności, na rzecz dbałości o zrównoważony rozwój i jakość.

**Słowa kluczowe:** rynek winiarstwa, wino ekologiczne, wino biodynamiczne, wino naturalne, eko-znakowanie

Accepted for print: 01.04.2015

For citation: Pink M. (2015). The sustainable wine market in Europe – introduction to a market trend and its issues. *Acta Sci. Pol., Oeconomia*, 14 (2), 131–142.