



WineGB: Supporting an emerging wine region

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English & Welsh Wine Symposium
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**Sheffield
Hallam
University**



The Starting Point

Small number of passionate producers

Localised production and sales

Small businesses

No industry structure

Low levels of expertise

Little awareness amongst stakeholders

Early Days

Production growth, more producers

Informal groups, localised still

Need to raise awareness among stakeholders

Build consumer awareness

Still very light industry structure and representation

Further growth, larger producers

Coordinated and representative industry body

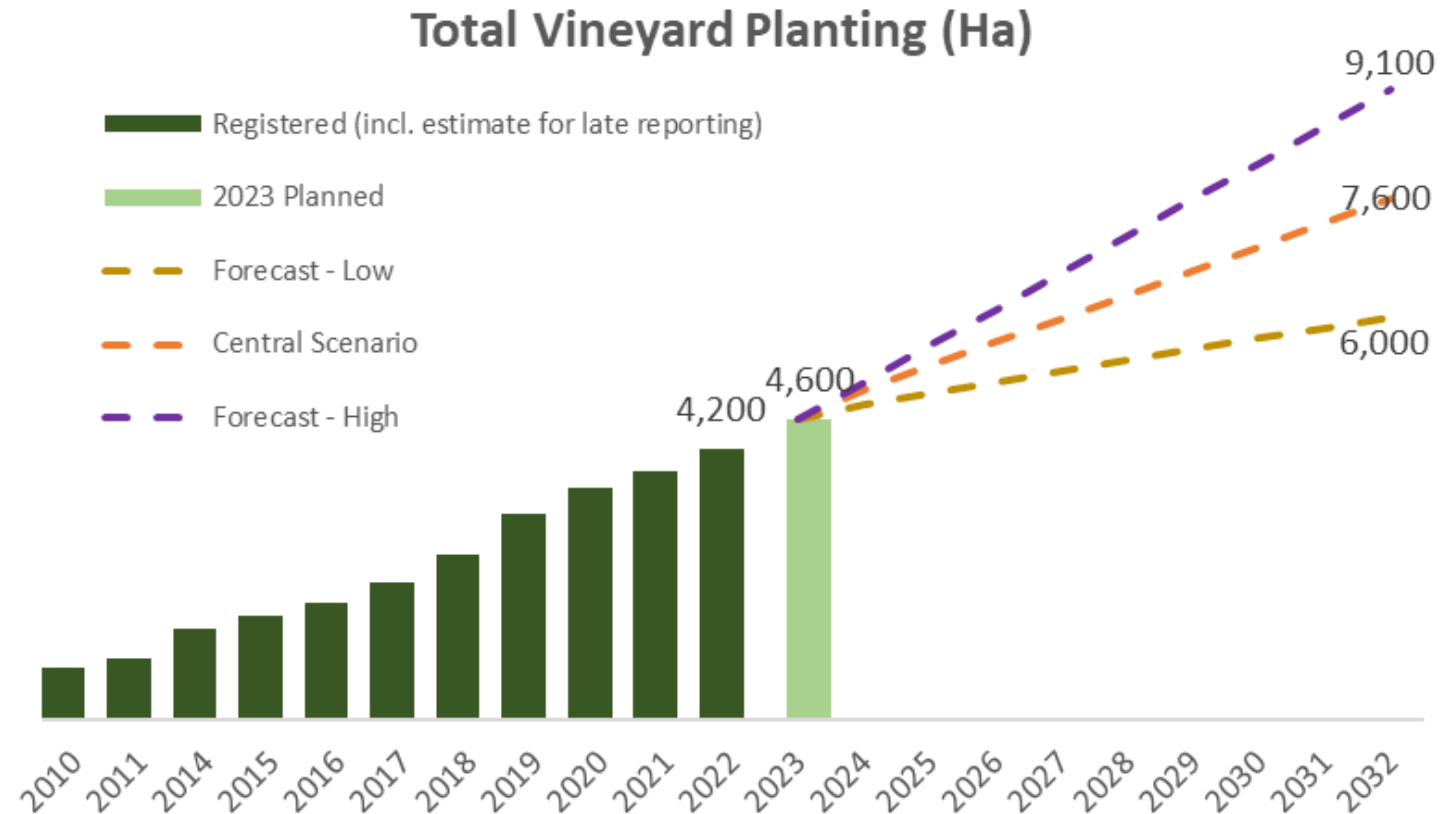
More developed industry structure

Broader distribution and stronger links to trade customers

More highly developed supply chain and consultants

Improving awareness from policy makers

Vineyard planting growth

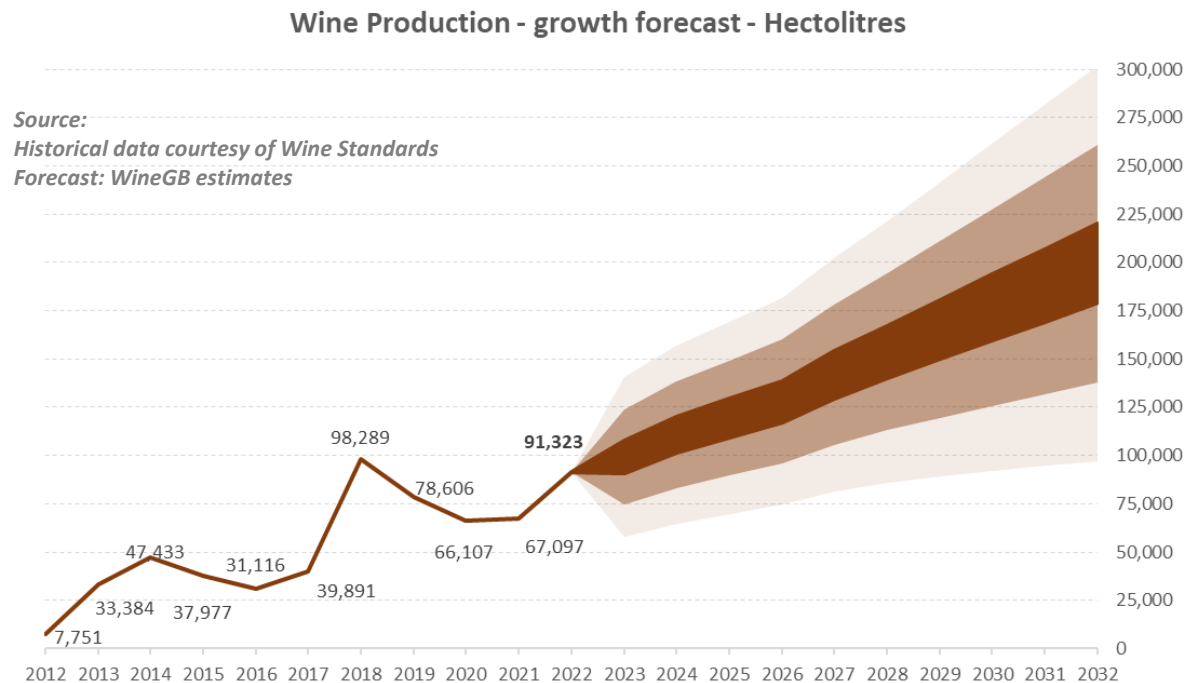


Assumptions

- **Central scenario:**
 - 2023 & 2024: 400 ha per year
 - 2025+ 325 ha per year, in line with 2016 to 2022 annual average
- **High scenario:** annual planting accelerates to 500 ha per year, similar to level seen in 2019
- **Low scenario:** annual planting slows to 150 ha per year, similar to levels seen 2010 to 2015

*Source: historical data courtesy of Wine Standards.
Forecast: WineGB estimates*

Wine Production - growth forecasts



Mid Scenario

	Total Yield (hl)	Production Bottles (m)
2015	37,977	5.1
2016	31,116	4.1
2017	39,891	5.3
2018	98,289	13.1
2019	78,606	10.5
2020	66,107	8.8
2021	67,097	8.9
2022	91,323	12.2
2023	99,000	13.2
2024	111,000	14.8
2025	119,000	15.9
2026	128,000	17.1
2027	142,000	18.9
2028	154,000	20.5
2029	165,000	22.0
2030	177,000	23.6
2031	188,000	25.1
2032	199,000	26.5

- For new vineyards assumes a ramp up to full production by Year 5 after planting
- For each growth scenario calculated 3 production figures, using average yield from last 10 years plus high / low alternatives (3x3 forecasts for each year)
- Yield per hectare is on a slight upward trend over last 10 years Expected to continue, with more vineyard land reaching full production (plus global warming? / change in mix of varieties?)
- Outcome is a wide range of production values, reflecting the yield variability experienced in UK. Mid range = 180 to 220,000 hectolitres by 2032

Wines of Great Britain Strategic Plan overview

2023 - 2025

Mission

To establish Great Britain as a sustainable wine region of world renown, recognised and celebrated for the quality of its wines and visitor experiences

Strategic Pillars

Industry Leadership

- Industry stewardship/lobbying
- Wine excellence/standards (GI)
- Data/Insights
- Diversity
- SWGB

Advisory Support

- R&D
- Training
- Education
- Tourism support - how grow
- Sustainability Support

Promoting Growth

- Export (Dept Business & Trade)
- Tastings events
- Wine awards
- Consumer Awareness campaigns
- Tourism trade partners

Key Partner

DEFRA, Home Office, HMT
Data and Insights providers

Key Partner

Plumpton, WSET, SWGB
NIAB EMR

Key Partner

DBT, VisitBritain
Awards partner

PR and Social Media
Events Programme

Industry Leadership



Educating Ministers and policy makers

- APPG, MP connections

Lobbying for policy decisions that support the industry

- Financial and planning

Persuading government agencies

- DBT, DEFRA, FSA

Data and Insights

- Data challenges

Geographical Indicator Framework

- Fit for purpose

Industry Values

- EDI
- Sustainability
- Excellence

Advisory and Support

Research and Development

- Coordination, application to the specific requirements of the industry

Training and Education

- Growing industry needs to attract and develop talent

Strive for product excellence

- Webinars
- Workshops and conferences
- Website

Mutual support

- Regions
- Forum
- Matrix



Promoting Growth



Raising Awareness

- Trade, government, tourism

Export programme

- Tastings, exhibitions, market attractiveness
- Inbound visits, trade and influencers

Domestic market

- Educate trade, sommeliers, buyers

Events programme

- London Wine Fair, WineGB Annual tasting

Consumer

- Relevant campaigns, industry wide

To Summarise

- Work in progress
- A supportive role, but occasionally directive
- Many stakeholders to manage
- Key to focus on core objectives
- Hugely dynamic and pivotal role in helping to shape the future of wine production in Great Britain
- An amazing opportunity...and responsibility



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