



TURN 360°
aluminium-closures.org

A GOOD CHOICE!

Results of an independent, representative end-consumer survey

Benefits for producers and consumers alike:

- Preservation of aromas, flavours and freshness
- Consistency from bottle to bottle
- Taste neutral – no impact on flavour
- Absence of cork taint
- A wide range of closures sizes with innovative design and infinite decoration options
- Very convenient – easy to open and reclose, store and ship
- Easy to recycle

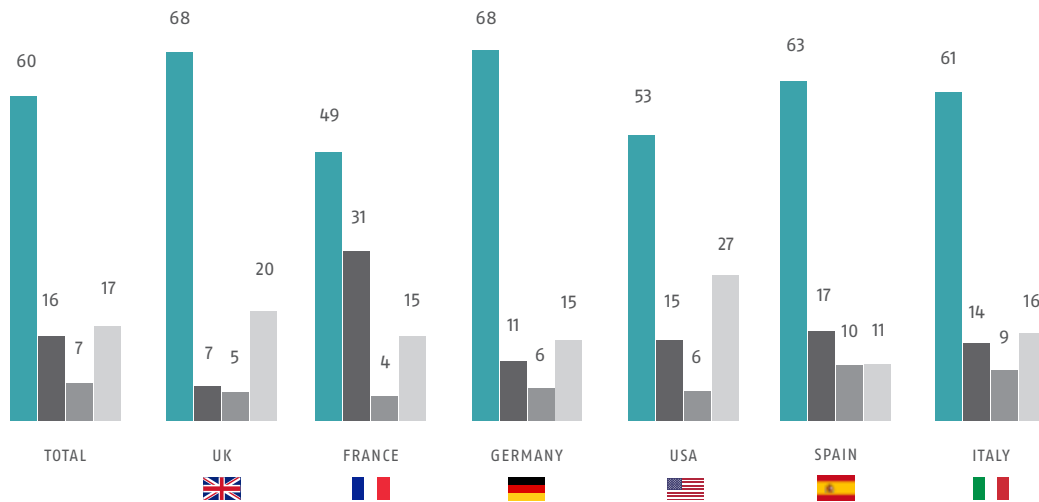
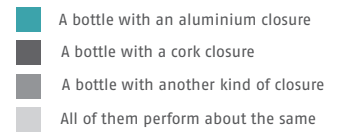


- An in-depth survey of 6,000 consumers, undertaken by IPSOS*, to discover consumer preferences on wine and spirit closures has confirmed that the majority prefer an aluminium closure over other closure options for its convenience.
- The study took place in five major European markets (France, Germany, Italy, Spain and UK) and the USA.
- Interestingly for the selected countries, there is not a significant preference for cork when the same wine is closed with cork vs aluminium closure and sold at the same price (39% vs 34%). This implies that the closure has no impact on their quality perception.
- The closure type does not influence choice nearly as much as the cork vs screw cap debate implies! 42% of the UK sample were not influenced, 35% in the USA and 28% in Germany.

* IPSOS is the world's third largest market research company with more than 80 offices around the globe.

QUESTION:

WHEN OPENING BOTTLES OF WINE AND SPIRITS WHICH BOTTLE CLOSURE DO YOU FIND THE MOST PRACTICAL AND EASY TO OPEN?



Source: IPSOS end-consumer survey, aluminium closures 2014, values in %



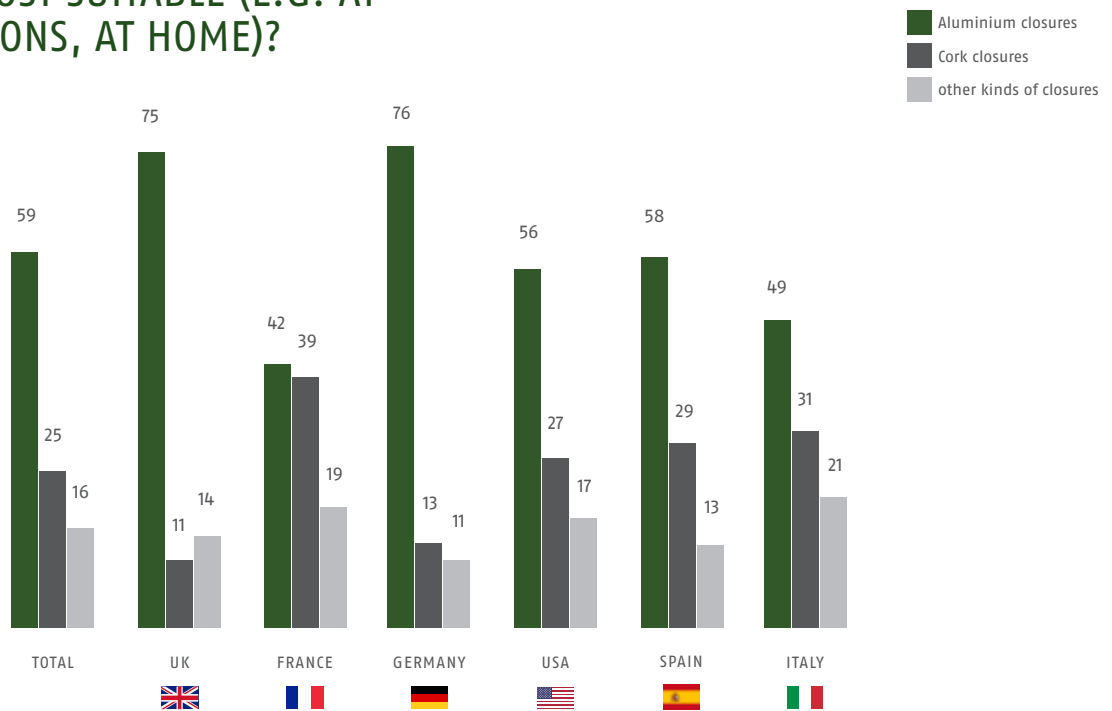
OPENING

- All countries (60%) have a clear preference and find aluminium closures more practical and easy to open.
- UK and Germany have the highest preference at 68%. However, even markets like Spain 63%, Italy 61% and USA 53% find aluminium closures more practical and easy to open.
- Globally – only 16% find cork more practical.



QUESTION:

WHEN RE-CLOSING UNFINISHED BOTTLES OF WINE WHICH KINDS OF CLOSURES DO YOU FIND THE MOST SUITABLE (E.G. AT OUTDOOR OCCASIONS, AT HOME)?



Source: IPSOS end-consumer survey, aluminium closures 2014, values in %



RECLOSING

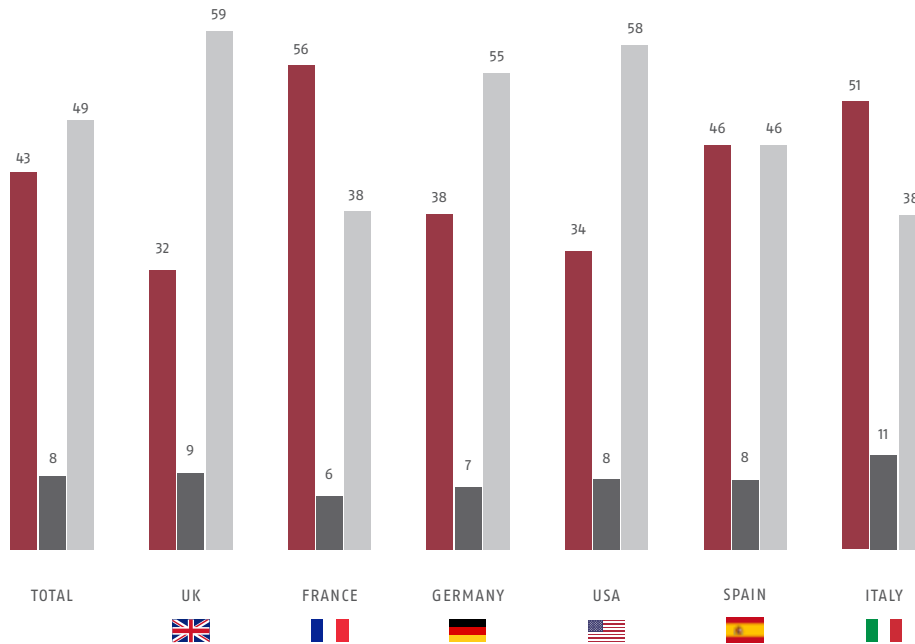
- A very strong preference for aluminium closures thanks to the ease of reclosing: 59% globally.
- UK and Germany - more than three-quarters of the population prefer aluminium closures.
- Significant preference also seen in USA, Spain and Italy.
- Only in France do consumers find cork almost as good as aluminium closures for reclosing.



QUESTION:

Have you ever poured away a bottle of wine because, when opened, you found the wine had gone bad or tasted tainted?

- Yes, I had to pour away a bottle of wine that was closed with a cork closure, because it had gone bad and/or tasted tainted
- Yes, I had to pour away a bottle of wine that was closed with an aluminium closure, because it had gone bad and/or tasted tainted
- I have never poured away a bottle of wine due to quality- and/or taste-deterioration



Source: IPSOS end-consumer survey, aluminium closures 2014, values in %



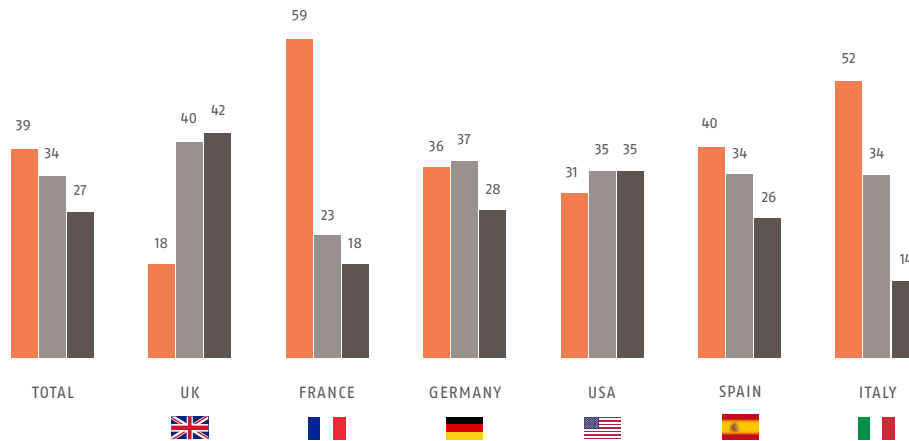
CORK TAIN

- Cork taint or bad taste has resulted in very high percentages of people globally throwing away their wine due to the corkage.
- Strikingly 56% of consumers in France agree, yes I had to pour away a bottle of wine that was closed with a cork closure because it had gone bad and/or tasted tainted. Similar high levels were seen in Italy (51%) and Spain (46%).

QUESTION:

If you saw two bottles of the same wine – one bottle closed with cork, the other with an aluminium closure: which one would you be more likely to buy, assuming that both cost the same?

- ... the bottle with cork closure
- ... the bottle with aluminium closure
- ... it would not influence my purchase



IPSOS end-consumer survey, aluminium closures 2014, values in %









PURCHASING PREFERENCE

- Interestingly for the selected countries, there is not a significant preference for cork when the same wine is closed with cork vs aluminium screw caps and sold at the same price (39% vs 34%).
- In traditional markets (France or Italy) where aluminium closures have a lower market penetration there is less understanding of the convenience offered by them.

MARKET PENETRATION

share of metal screw cap in %

Geographies	2008	2013
 France	12	31
 Germany	29	47
 Italy	17	19
 Spain	7	10
 United Kingdom	43	52
 USA	30	43







Source: Euromonitor International (Glass bottles, metal screw caps, off-trade sales)



- As the market penetration grows across Europe and the USA it is expected that the figures in favour of aluminium closures will even grow further.
- Over 30% of consumers in the US, Spain and Italy would prefer to purchase wine with an aluminium closure and yet, market penetration is much lower than the demand in these countries. The most striking example is Spain where penetration is only 10% and yet 34% would prefer to buy a bottle with an aluminium closure.
- The survey confirms the significant preference for aluminium closures of UK wine consumers (40% vs 18%). In some countries (notably Germany and the USA), there is an almost equal preference.

ROSÉ WINE FOCUS

share of metal screw cap in %

Geographies	2008	2013
 France	12	37
 Germany	49	67
 Italy	18	19
 Spain	12	14
 United Kingdom	40	48
 USA	27	43

Source: Euromonitor International (Glass bottles, metal screw caps, off-trade sales)



- Interesting dynamics in the rosé market where traditional wine makers use far more contemporary packaging design.
- The benefits of aluminium closures are easy to see and understand: ideal for outdoor occasions, they are easy to open and close and lend themselves to creative design and branding.
- In France, the share of aluminium closures has tripled in five years to 37%!





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