



Natural, Orange, Amber, and the Marketing of Georgian Wines in the United States

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The market for “natural wine”

- How big and important is the “natural wine” trend?
- How does it compare with other niche wine trends?
- How can the “natural wine” market be defined, sized, and analyzed?



VOGUE

Why Wild, Chemical-Free, "Natural" Wines Are Taking the Industry by Storm

Better Homes & Gardens

Why Natural Wines Are Growing in Popularity—and Where to Get Them

Find out what you should know about buying natural wines and how they differ from the \$5 bottles of wine on the shelves.

THE NEW YORKER

HOW NATURAL WINE BECAME A SYMBOL OF VIRTUOUS CONSUMPTION

WINEENTHUSIAST

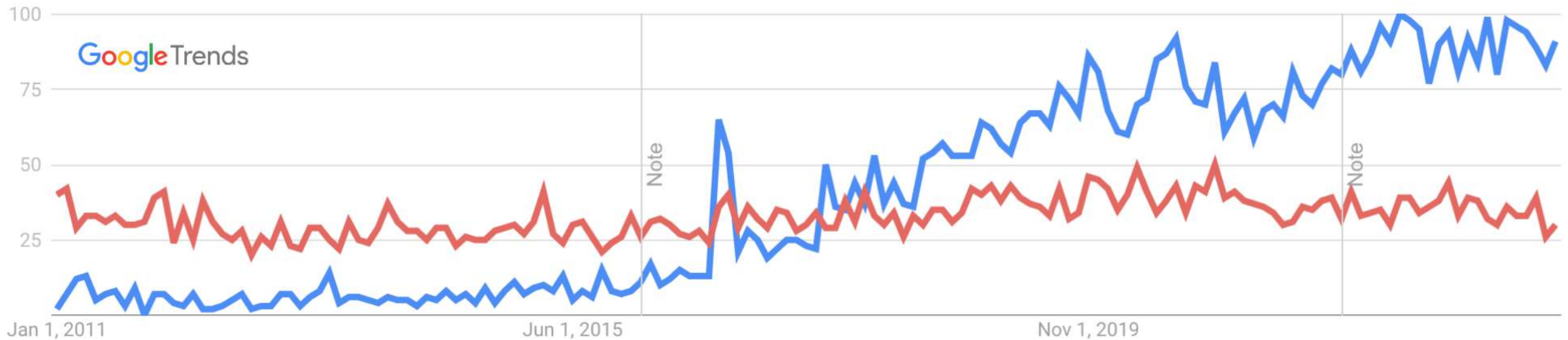
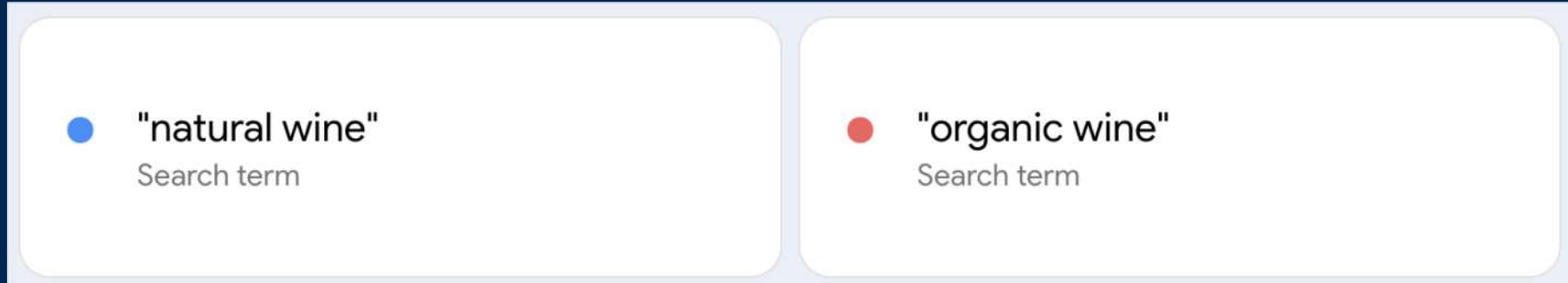
How Natural Wine Shops Went From Fringe Hangouts to National Phenomena

BY SARAH E. DANIELS



Google US search interest, 2011–2023

“Natural Wine” vs. “Organic Wine”

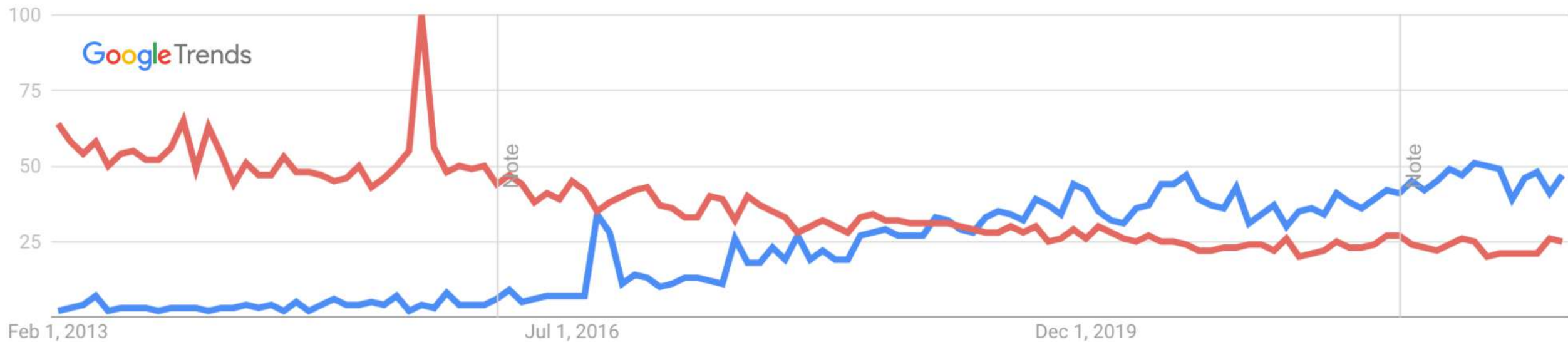


Google US search interest, 2013–2023

“Natural Wine” vs. “Robert Parker”

● natural wine
Search term

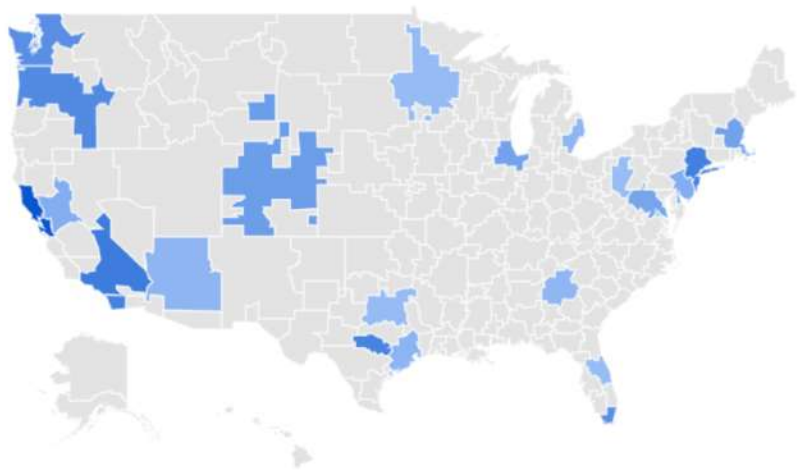
● robert parker
Search term



US interest in “natural wine” is concentrated in a few wealthy, highly educated coastal metro areas

Interest by subregion ?

Metro ▾

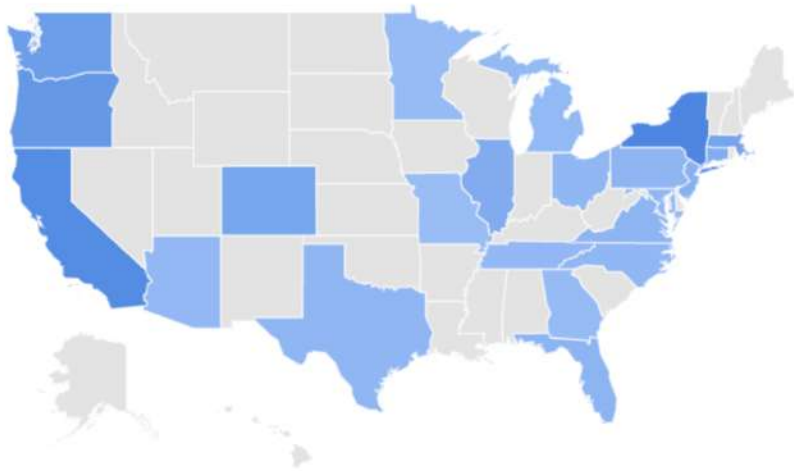


1	San Francisco-Oakland-San Jose CA	100	<div style="width: 100%;"><div style="width: 100%;"></div></div>
2	Los Angeles CA	67	<div style="width: 67%;"><div style="width: 67%;"></div></div>
3	New York NY	63	<div style="width: 63%;"><div style="width: 63%;"></div></div>
4	San Diego CA	62	<div style="width: 62%;"><div style="width: 62%;"></div></div>
5	Austin TX	60	<div style="width: 60%;"><div style="width: 60%;"></div></div>

US interest in “natural wine” is concentrated in a few wealthy, highly educated coastal metro areas

Interest by subregion [?](#)

Subregion ▾



1 District of Columbia

100

2 New York

58

3 California

53

4 Oregon

42

5 Washington

37

Highest and fastest-growing category in Global Wine Opportunity Index 2023

Source: *Wine Intelligence*

Base = Global regular wine drinkers (n=19,835)

		2023 Opportunity index	Score Change 2023 vs 2022	Rank difference 2023 vs 2022
1	Natural wine	63.5	10.7	=
2	Organic wine	58.6	9.2	=
3	Sustainably produced wine	54.9	9.5	=
4	Environmentally friendly wine	53.3	10.0	=
5	Preservative free wine	48.2	9.3	1↑
6	Fairtrade wine	46.9	7.1	-1↓
7	Wine from a carbon-neutral winery	44.4	7.4	=
8	Sulphite free wine	42.6	7.6	=
9	Pet Nat (Petillant Naturel)	40.5	7.4	=
10	Biodynamic wine	38.8	7.0	=
11	Orange / skin contact wine	38.0	6.5	=
12	Vegan wine	32.9	5.4	1↑
13	Vegetarian wine	32.0	4.3	-1↓



Natural wine is not the same as organic or biodynamic wine (or at least wants to be different)

Source: Hu et al., 2020

Farming	Organic	Biodynamic	Natural
Origin	Albert Howard F.H. King Walter James Rudolf Steiner	Rudolf Steiner	Fukuoka (1975) Bill Mollison David Holmgren
Philosophy	a better agricultural system with the use of animal manures, cover crops, crop rotation, and biologically based pest control	spiritual, homeopathic, connect with nature's rhythms and the universe; polyculture, animal husbandry	permaculture, "do-nothing agriculture": minimal intervention; "nothing added and nothing taken away"
Practice	ecologically based pest controls and fertilizers derived from animal, plant wastes and nitrogen-fixing cover crops	vineyard treatments organized according to the season, location of the constellations, and phases of the moon; dung, nettle, silica, chamomile, etc. made into dynamized teas buried as composts	use beneficial plants and animals in the vineyards to create a resilient ecosystem; handpick, dry-farm, cultivate living soils with biodiversity
Limitation	sometimes toxic despite organic: Bordeaux mixture	disbelievers argue it's not scientific and has limited efficacy; copper and sulfur usage as fungicides allowed; difficult in wet vintages and regions	free-form, up to individual interpretation, can be risky & costly as an upfront investment
Certification	USDA Organic, CCOF, EU Organic, AB and Ecocert, BioGro	Demeter, Respekt-BIODYN, Biodyvin, Certified Biodynamic, AgribioDinamica	NA



- **Hand-picked, organically grown grapes**
- **No commercially cultured yeast**
- **No filtration or fining**
- **No added acid, sugar, tannin, water, alcohol, heat**
- **<30 mg/L added sulfites**
- **Only 198 wineries and 506 wines certified as of 2023**

Other certification schemes



Association	Definition of natural wine	Norms
<i>Raw Wine</i> (UK, Germany, USA)	Natural Wine is farmed organically or biodynamically, using permaculture or the like and made (or rather transformed) without adding or removing anything in the cellar. No additives or processing aids are used, and 'intervention' in the naturally occurring fermentation process is kept to a minimum. As such, neither fining nor (tight) filtration are used. The result is a living wine - wholesome and full of naturally occurring microbiology.	Vineyard: Organic/Biodynamic Grapes Cellar: No additives (no sulfite added), no fining, no filtration
<i>L'Association des Vins Naturels</i> (France)	Natural wine is: A wine whose grapes come from organic or biodynamic agriculture, A wine that is vinified and bottled without any input or additives.	Vineyard: Organic/Biodynamic Grapes Cellar: No additives (no sulfite added)
<i>S.A.I.N.S.</i> (France)	Natural wine without no inputs and no sulfites added.	No additives (no sulfite added)
<i>Vini Veri</i> (Italy)	Lack of definition	Vineyard: Organic Grapes Cellar: Sulfur dioxide cannot exceed 80 mg/l for dry wines and 100mg/l for sweet wines
<i>VinNatur</i> (Italy)	Lack of definition	Vineyard: No synthetic pesticides Cellar: Sulfur dioxide cannot exceed 50 mg/l
<i>APVN</i> (Spain)	Natural wine is wine made with natural grapes, without adding or removing anything from that grape	Vineyard: No chemical fertilizers, herbicides, pesticides, systemic fungicides or genetically engineered organisms are used. Cellar: No sulfite added

NATURAL WINE ASSOCIATION



“Natural wine means that the grape-grower/winemaker:

1. Builds and looks after the vineyard in accordance with **bio (eco) requirements**; **looks after the environment** and tries to create a **self-sustaining eco system**.
2. Does not use methods...that...alter the wine’s **natural organoleptic properties**.
3. Recognizes the **priority role of terroir** in the wine production process...promotes accentuating the terroir properties.
4. Labels should be truthful and they should fully **reflect the wine’s origin.**”

“Decisions on accepting new members are made by **majority of the Association founding members.**”

The definition of natural wine

‘To qualify as a Vin Méthode Nature, a wine has to be made from hand-picked organic grapes’

JANCIS ROBINSON

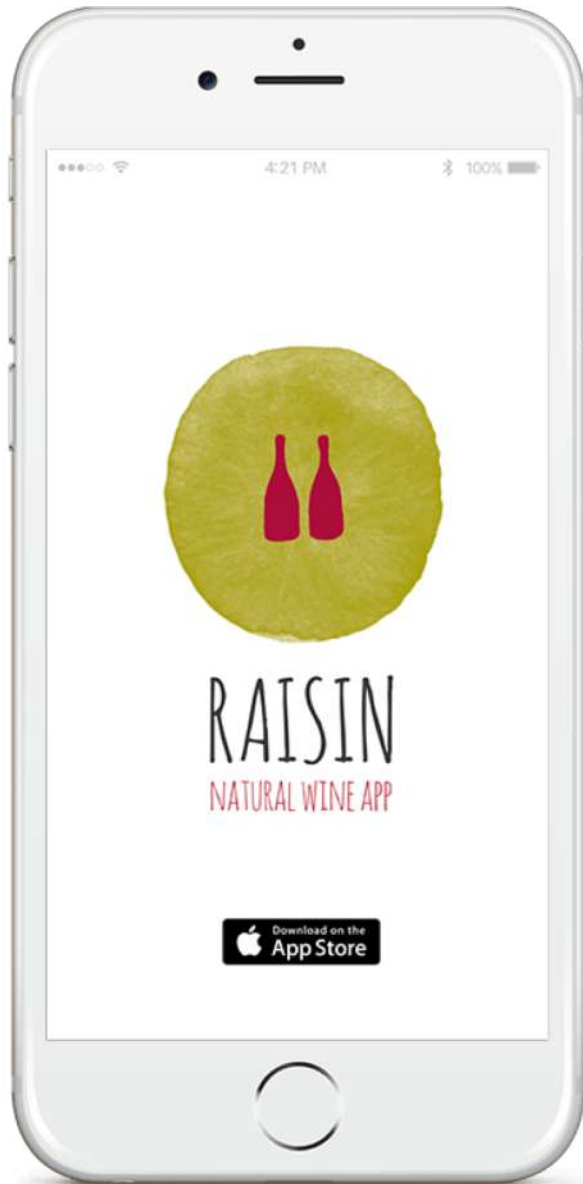
+ Add to myFT



“

How is this new designation to be policed? It will be impossible to monitor every single vineyard

Her final word: “In my heart of hearts, I just don’t think natural wine is certifiable.”



RAISIN Natural Wine App

- “World’s most complete list of natural winemakers”
 - Started in 2016
 - About 2,900 wineries listed as of Nov 2023
 - 86% of wineries are in EU
 - About 400 wineries added in 2022
 - No verification or inspection process
 - 250 eur/year fee for listing
 - 58% of wineries include description



Grapes from the vine to the bottle.

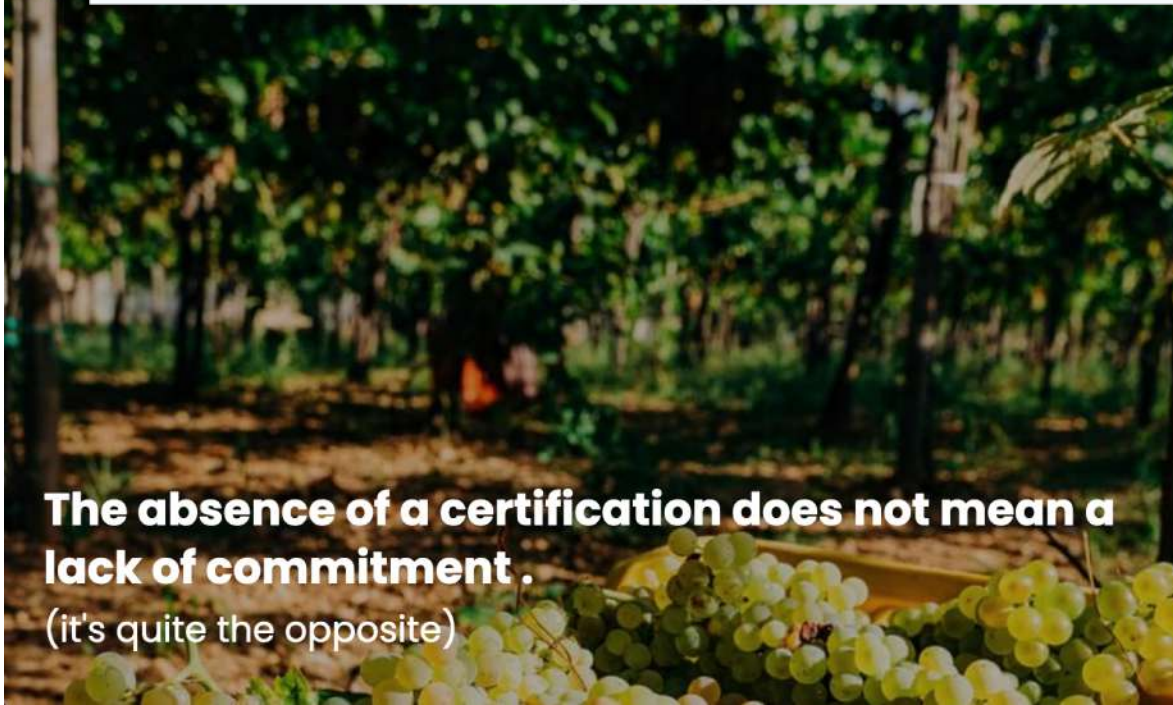


Honest wines.



Pesticides, Herbicides, Additives, Yeasts.

wines that highlight the work of the winemaker, not a factory.

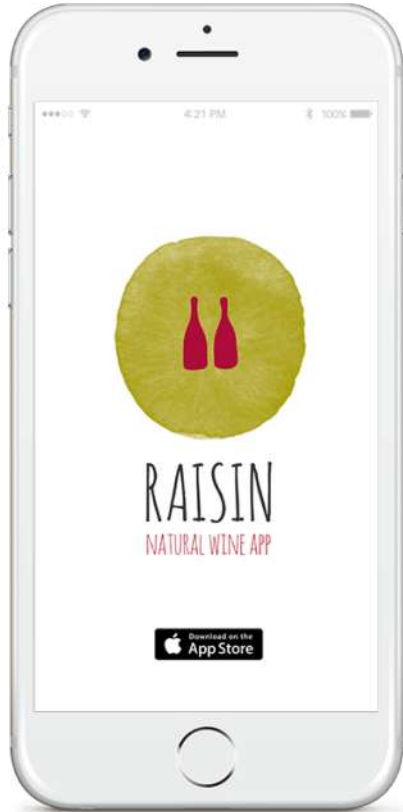


The absence of a certification does not mean a lack of commitment .
(it's quite the opposite)



The best wines respect nature and humans.
(without marketing)

“Natural wineries” listed on RAISIN



- **Top 5 countries by number of listings:**
 1. France: 1,388 wineries (48%)
 - 7x number of Vin Méthode Nature members
 2. Italy: 645 wineries (22%)
 3. Spain: 192 wineries (7%)
 4. **Georgia: 107 wineries (4%)**
 5. USA: 74 wineries (3%)
- **Total: 2,896 wineries**

Data set: Pilot survey of producers who self-identify as natural winemakers

- Face-to-face semi-structured interviews, content analysis
- Interviewed 66 natural wine producers in EU
 - Attendees at 4 natural wine fairs in France: Millésime Bio, Les Affranchis, Roots 66, La Dive Bouteille
 - Jan and Feb 2023
 - Located in France, Spain, Italy, Portugal, Austria
- Full-scale survey conducted from May to October 2023 (n=518)
 - Data collection complete, analysis in progress

Data set: Pilot survey findings

- Estates range from 2 to 30 hectares
- Most production from 2,000 bottles to 170,000 bottles
- Biggest producer was producing over 4,000,000 bottles a year
- Various producers mentioned agroforestry, farming (sheep, horses, cows), B&B as parallel activities.
- Many are winemakers that sell their entire production every vintage and work with a system of allocations.
- Lots of direct-to-consumer sales
- Widespread disagreement over production and sensory characteristics make a “natural wine”

Define natural wine by its sensory characteristics?

- **Qualities**

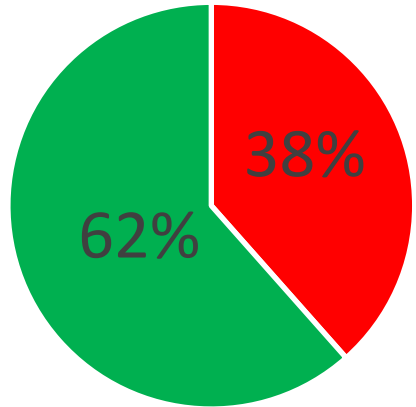
- Appearance
- Color
- Smell
- Taste

- **Faults**

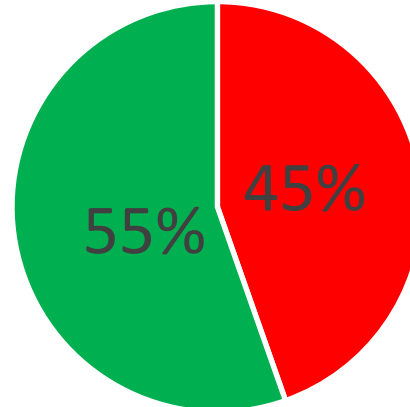
- Reduction
- Oxidation
- Brettanomyces
- Mousy off-flavor (goût de souris)
- Volatile acidity

Initial results from pilot survey of producers: Sensory characteristics of natural wine

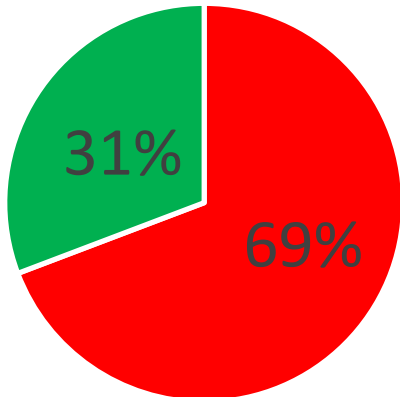
Reduction



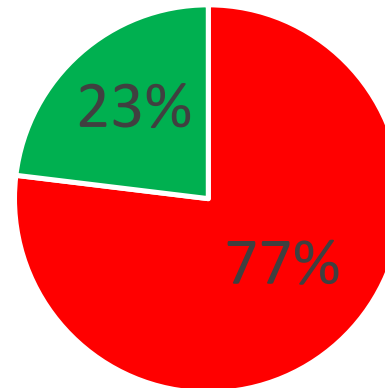
Oxidation



High Volatile Acidity



Brettanomyces



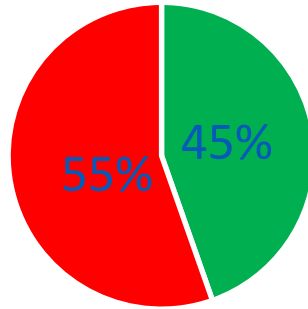
■ Not OK ■ OK

Define natural wine by its production characteristics?

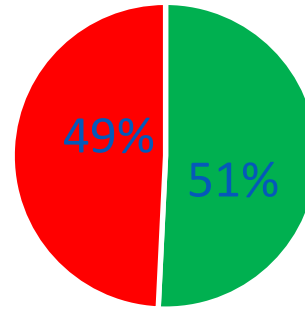
- **Winegrowing**
 - Organic
 - Biodynamic
 - Conventional
- **Winemaking**
 - Sulfites
 - Fining
 - Filtering

Initial results from pilot survey of producers: Production characteristics of natural wine

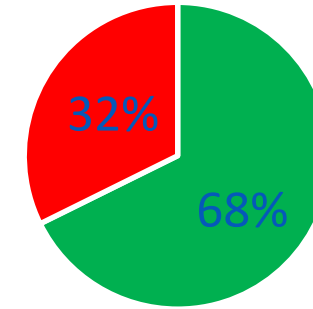
No Added Sulfites



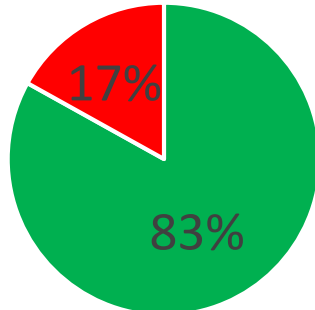
Biodynamic Certified



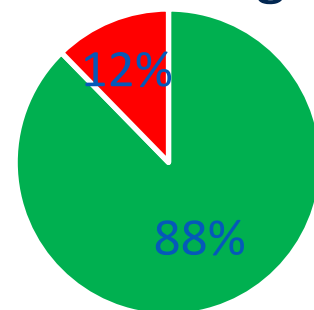
No Filtering



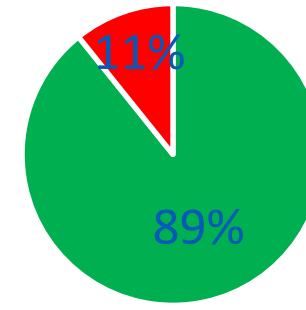
Hand-Harvested Grapes



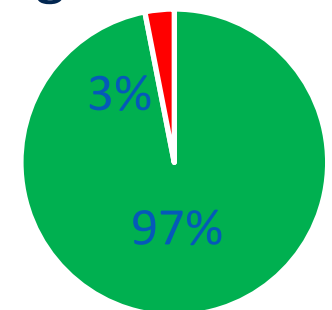
No Fining



Spontaneous Fermentation



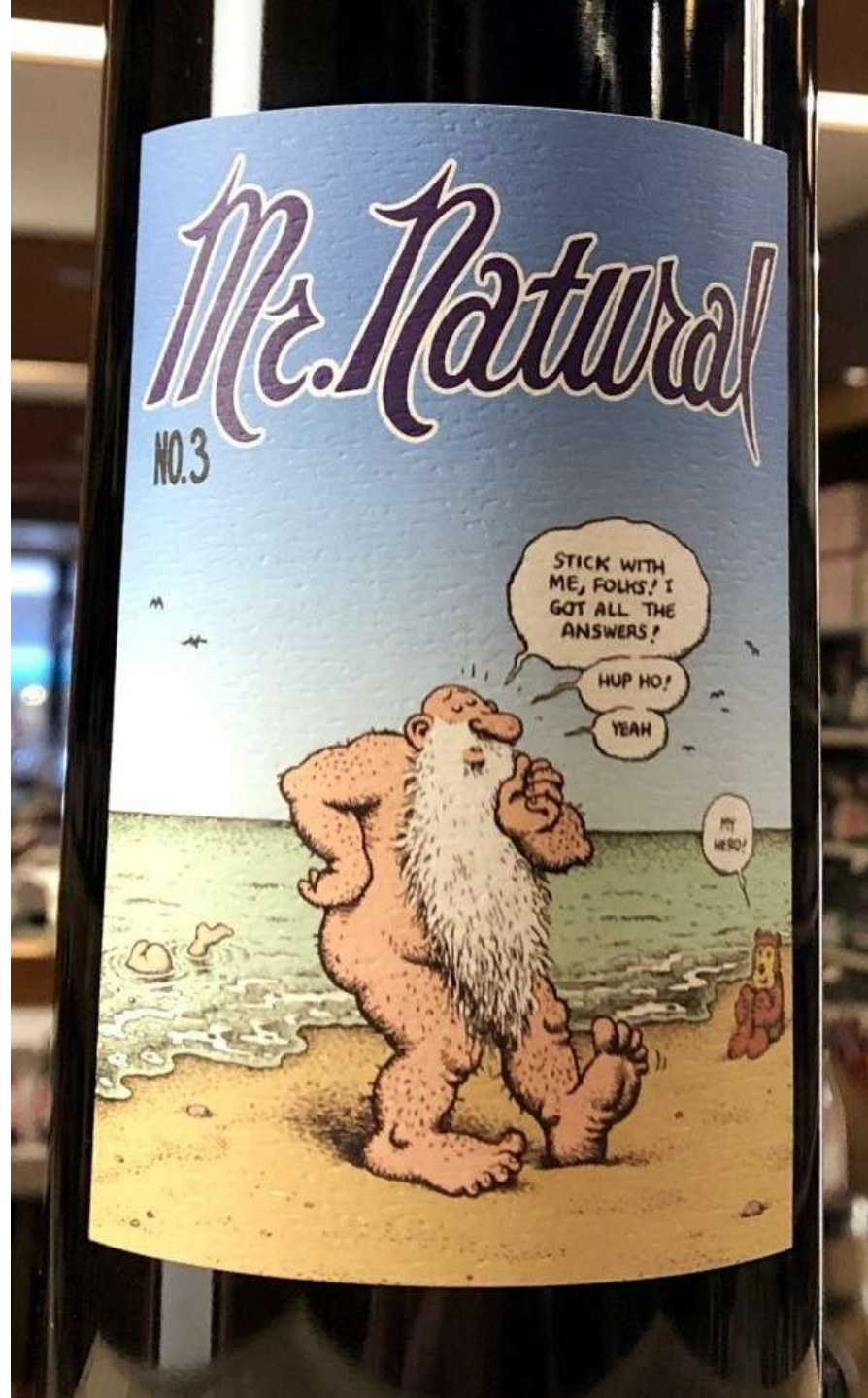
Organic Certified



■ Necessary ■ Not Necessary

Define natural wine by its business characteristics?

- **Size**
 - Limited size? (like craft beer)
 - Often not primary source of income for owners
- **Sales**
 - Direct-to-consumer sales
 - Particular group of distributors
- **Marketing**
 - Networking / socializing
 - Wine fairs (but often without wine to sell)





RAISIN **NATURAL WINE** & **FOOD LOVERS!**

The best wines respect nature and humans.
(without marketing)



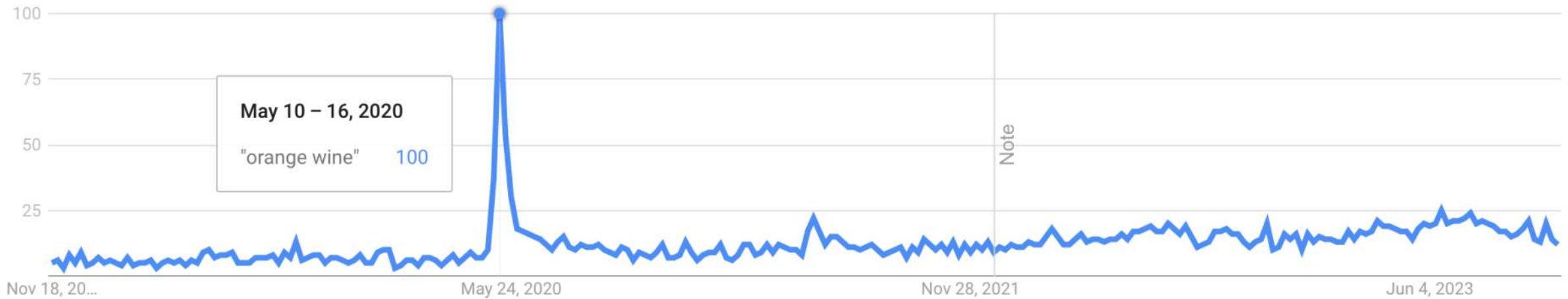
“Orange Wine” vs. “Amber Wine”

- **Orange wine**
 - Coined by UK wine importer David Harvey (2004)
 - Wine experts (Robinson, Goode, Feiring) began adopting the term around 2008
 - Substantial, growing consumer recognition
- **Amber wine**
 - Translation of Georgian term — ქარვის ღვინო
 - Little consumer recognition
 - Online, mentioned 1/15 as often as “orange wine”

Google searches, 2020–2023

“orange wine”

Interest over time ?



The New York Times

THE POUR

The Polarizing Power of Orange Wine

The best examples of these white wines, made with red techniques, are striking and wonderful. Still some dismiss this ancient wine, now trendy once more.

The best places to buy orange wines tend to be shops that also have selections of natural wines.



By **Eric Asimov**

Published **May 7, 2020** Updated May 12, 2020

Some use the phrase **amber wine**, which describes the color of at least a few examples. They can otherwise range from pale pink to rosy copper, russet or a dark, almost ruby-shaded brown.

Others prefer the phrase skin-contact whites or even skin-macerated whites, which, while technically correct, lacks any sort of evocative power.

Most, though, have settled on **orange wine**, a term that has piqued the imagination of a generous percentage of the wine-buying public. It's not literally accurate, of course, but for that matter, neither are white wines white nor reds red.

But wines made like this are the oldest form of whites, stretching back centuries if not millennia. In some parts of the world, like the Republic of Georgia, white wine never stopped being made this way, despite formidable political and cultural pressure during the years of Soviet domination to adopt more conventional methods of mass production.



Orange Wines mentioned in Eric Asimov's May 7, 2020 article

- | | | |
|-------------------------|----------|-----------------|
| 1. Gravner | Italy | Collio (Friuli) |
| 2. Radikon | Italy | Collio (Friuli) |
| 3. La Stoppa Ageno | Italy | Emilia |
| 4. Paolo Bea Arboreus | Italy | Umbria |
| 5. Papras Pleiades | Greece | Tyrnavos |
| 6. Aphros Phaunus | Portugal | Minho |
| 7. Zurab Topuridze | Georgia | Guria |
| 8. Two Sheperds | USA | Sonoma, CA |
| 9. Donkey & Goat | USA | Berkeley, CA |
| 10. Bize & Fils Akatcha | France | Bu |

“Orange wine” sections increasingly common on restaurant wine lists

what is
ORANGE WINE
- WINE -

NOT MADE
- of -
ORANGES

ORANGE WINES
are
WHITE WINES
made like
RED WINES

WHITE GRAPES ARE SKINNED TO MAKE WHITE WINES.
ORANGE WINES USES THE SAME GRAPES BUT WITHOUT
TAKING THEIR SKIN OFF. THAT BRINGS RED WINE
CHARACTERISTICS TO THE WINE, CREATING THE
ORANGE WINE.

ORANGE WINES
- are -
NATURAL

ORANGE WINES
has similar texture of
- RED WINE -

it's
6000
- YEARS OLD -

ORANGE WINE MAKING PROCESS DATES BACK TO
ABOUT 6000 YEARS AGO, AS EVIDENCED IN THE
REPUBLIC OF GEORGIA.

Orange Wines
Show me some skin!
White wines made with extended skin contact (and perhaps better than Tecate).

For your first date with Orange wine

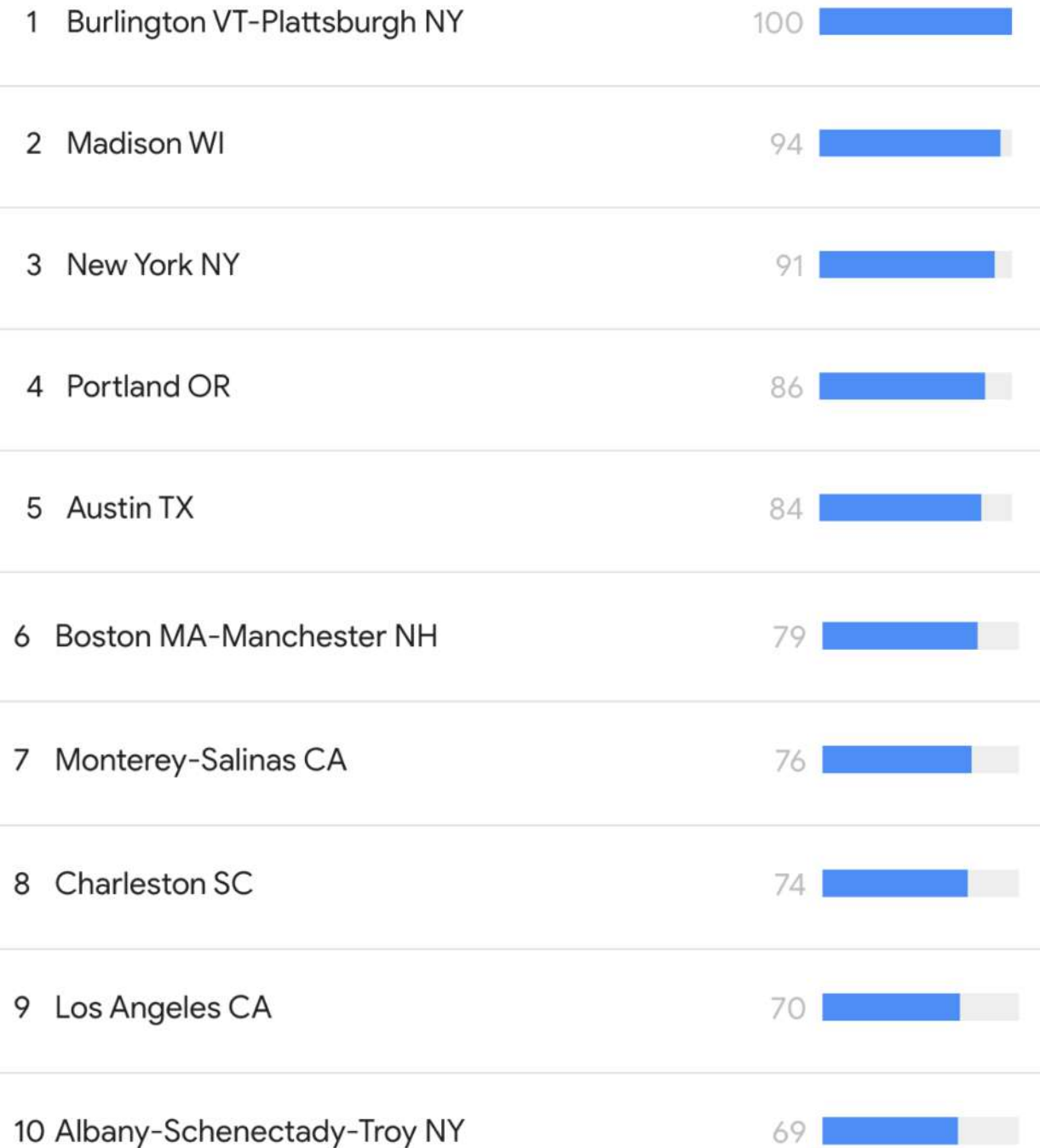
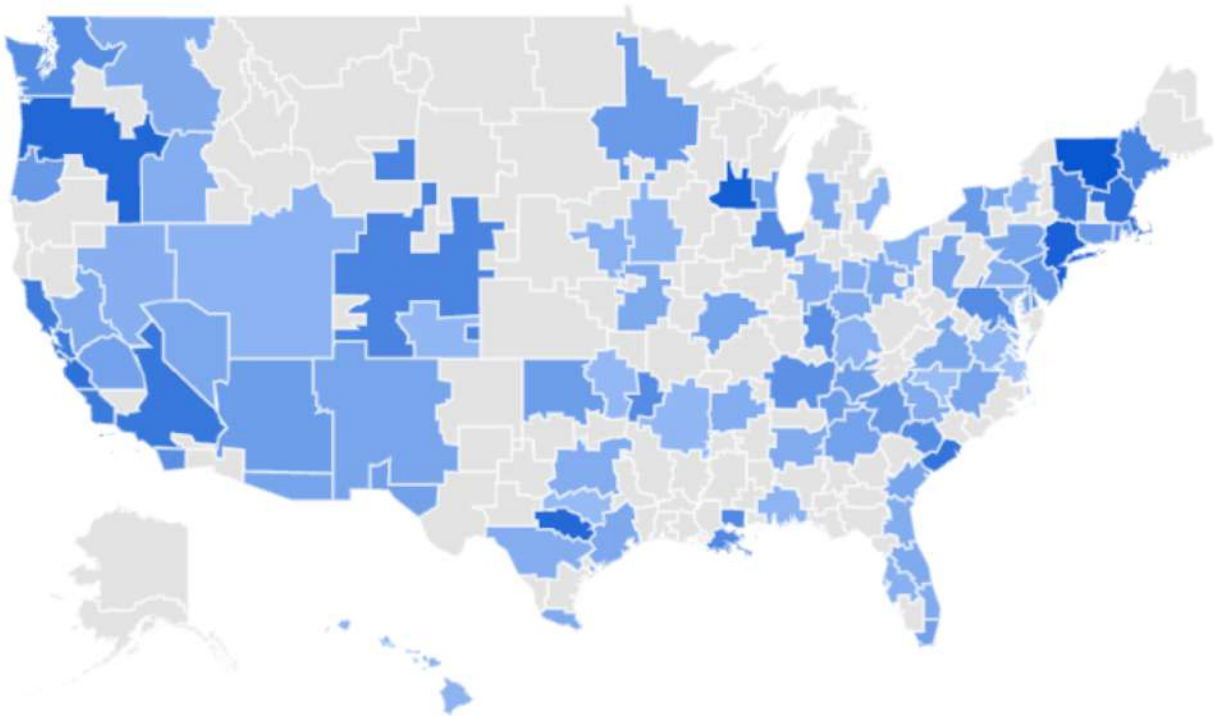
Garganega	Angiolino Maule, Sassaia, Veneto '08	36	🍷
Insolia Blend	COS, "Rami", Sicily	36	🍷
Pinot Gris	Big Table Farm, Wirtz Vineyard, Willamette Valley '11	36	🍷
Chardonnay	Mountains '09	46	🍷
Grenache			
Ribolla Gialla			
Roussanne			
Semillon			
Vermentino			
Friulano	Radikon, Jakot, Venezia		
Ribolla Gialla	Gravner, Venezia		
Vitovska	Vodopivec, "Classico"		
White Blend	Paolo Bea, Santa Margherita		

ORANGE WINES
- are -
NATURAL

it's
6000
- YEARS OLD -

**ORANGE WINE MAKING PROCESS DATES BACK TO
ABOUT 6000 YEARS AGO, AS EVIDENCED IN THE
REPUBLIC OF GEORGIA.**

Urban areas with highest proportion of Google searches for “orange wine”, 2023



● "orange wine"
Search term

● "natural wine"
Search term

● "amber wine"
Search term

+ Add comparison

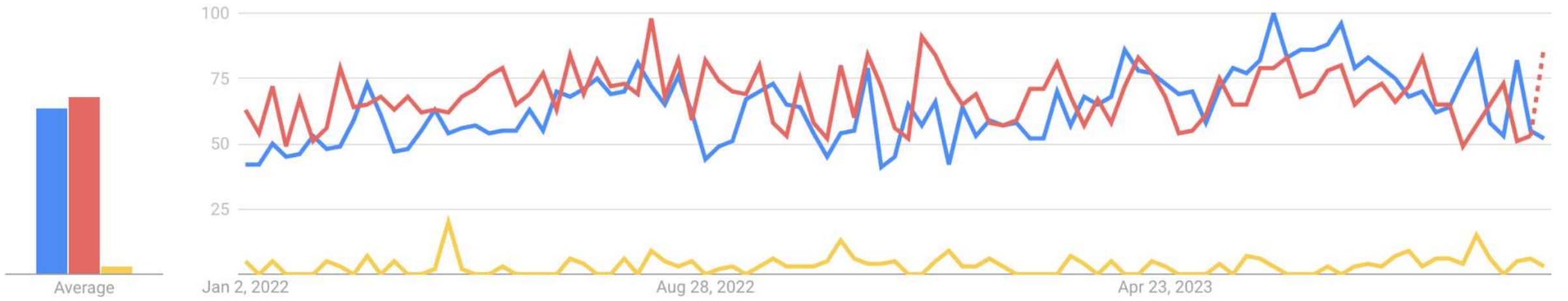
United States ▼

1/1/22 - 11/14/23 ▼

All categories ▼

Web Search ▼

Interest over time ⓘ



Orange Wine is Trending for All the Right Reasons

BY JILLIAN DARA

FOOD & WINE

The Best Orange Wines to Drink Now

Call them orange wines or skin-contact whites, either way it's a world you need to know.

By [Ray Isle](#) | Updated on August 29, 2023

2020 Orgo Dila-O Rkatsiteli-Mtsvane (\$17)

Winemaker Gogi Dakishvili has been instrumental in the ongoing revival of Georgia's traditional qvevri-fermented, skin-contact style of winemaking. This example of his work is pale amber-orange, with citrus and stone fruit flavors; the fruit is so appealing, it's easy to overlook the wine's firm tannins.

2019 Teliani Valley Amber Blend (\$18)

From Georgia, the homeland of skin contact white wines, this excellent example is a gorgeous, burnished copper in color. Made from the local grapes Rkatsiteli, Kisi, Khikhvi, and Mtsvane – there will be a quiz later – it's all mangos, pears, black tea, and earth, with firm, gripping tannins.



WIKIPEDIA
The Free Encyclopedia

Orange wine

[Article](#) [Talk](#)

From Wikipedia, the free encyclopedia

(Redirected from [Amber wine](#))

Concluding implications for niche marketing of Georgian wines as natural, orange, or amber

- **“Natural wine” means whatever winemakers want it to mean**
 - Social networking and specialty distributors are keys to sales
 - Certification programs are few, unpopular, and unimportant
- **Easier to market wines as “orange” than “amber”**
 - Can sell into existing “orange wine” sections of stores, restaurants, and wine bars
 - Little awareness of “amber,” so marketing is an uphill battle
 - If wine is marketed as “amber,” then must communicate to “orange”-aware consumers that it’s in the same category



Natural, Orange, Amber, and the Marketing of Georgian Wines in the United States

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University of California, Davis
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