The European Wine Market Report 2024: Navigating a Polycrisis of Production, Consumption, and Price

Publication date: June 17, 2025

Executive Summary

The European wine market in 2024 was defined by a polycrisis: a confluence of severe, interconnected pressures that tested the sector's resilience and accelerated structural transformations. The year was marked by a historic, climate-driven production shortfall, a continued structural decline in consumption exacerbated by persistent economic headwinds, and a paradoxical stability in overall market value, which was precariously propped up by record-high prices. This report provides a comprehensive analysis of the market's performance, offering data-driven insights for industry professionals navigating this complex and volatile landscape.

The key metrics for 2024 paint a stark picture of the challenges faced. Vinified production in the European Union (EU) fell to a historic low for the 21st century, estimated at 138.3 million hectolitres (mhl), a 3.5% decrease from the already low levels of 2023.[1] This dramatic drop was a direct consequence of extreme and erratic climatic events across the continent. Concurrently, EU wine consumption continued its long-term downward trend, contracting by a further 2.8% to 103.6 mhl, a volume not seen in over six decades.[1] This decline was driven by the erosion of consumer purchasing power due to inflation and profound shifts in lifestyle and generational preferences.

Despite these contracting volumes, the international trade landscape revealed a more nuanced story. While global export volumes remained stagnant at 99.8 mhl, the total export value held remarkably firm at €35.9 billion. This stability was achieved through a record-high global average export price of €3.60 per litre, a figure that maintained the peak set in 2023 and underscored the industry's reliance on a "value over volume" strategy.[3] The total European wine market value was estimated at approximately USD 78.5 billion, reflecting the power of this premiumization trend to offset volume losses.[5]

The year 2024 also witnessed a significant reordering of Europe's traditional production hierarchy. France, battered by frost, hail, and disease, suffered a catastrophic 23% collapse in production, ceding its long-held position as the world's top producer to Italy, which experienced a partial recovery from its own poor 2023 harvest.[6] Spain also saw a significant rebound in volume, though output remained below its five-year average.[8]

The bifurcation of the market—a key theme of recent years—intensified dramatically. The premium and sparkling wine segments, particularly Prosecco, demonstrated considerable resilience and even growth, buoyed by strong export demand. In stark contrast, the mass-market and, most notably, the red wine categories faced a severe crisis of oversupply and falling demand, particularly in traditional markets like France. This structural imbalance has forced a strategic reckoning for producers across the continent, prompting government-backed vineyard removal programs and accelerating industry consolidation.[9] The European wine sector is at a critical inflection point, where adapting to the imperatives of climate change and evolving consumer tastes is no longer a matter of choice, but of survival.

Chapter 1: The European Wine Market in 2024: A Year of Unprecedented Challenges

The performance of the European wine sector in 2024 cannot be understood without first examining the powerful external forces that shaped its trajectory. The market operated within a "polycrisis" framework, where macroeconomic pressures, extreme climatic events, and shifting global supply-and-demand dynamics converged to create an environment of unprecedented challenge and volatility. These factors collectively depressed production and consumption volumes while simultaneously driving prices to record highs, creating a complex and often contradictory market landscape.

1.1 Macro-Economic Headwinds: The Inflationary Squeeze

The European wine market in 2024 continued to navigate a challenging economic environment characterized by persistent inflation and rising operational costs. These factors exerted significant pressure from both the supply and demand sides of the value chain. For producers, the lingering effects of inflation on energy, transport, and essential materials like glass and fertilizers continued to elevate production expenses.[3] This sustained cost pressure made it more difficult for wineries, particularly smaller and medium-sized enterprises, to secure credit and finance necessary investments in vineyard management and cellar technology, hindering their ability to adapt to other market challenges.[8]

Simultaneously, consumers faced an erosion of their real disposable income, leading to more cautious and price-sensitive purchasing behavior. This economic squeeze was a primary driver of the decline in overall consumption volumes, as households reduced spending on discretionary items, including wine.[1] This trend was particularly evident in the off-trade channel, where consumers increasingly opted for lower-priced alternatives or simply reduced the frequency of their purchases.

This dynamic created a significant "value gap" within the market. While the headline figure for the average global export price remained at a record high of €3.60 per litre, this masked deep disparities at the producer level.[3] The high average price was largely sustained by scarcity and strong demand in premium segments, such as high-end appellations and sparkling wines. However, this was not a universal experience. In France, for instance, while export prices remained elevated, producer prices for certain categories, such as bulk red wines, experienced significant declines.[10] This divergence indicates that many producers in oversupplied categories were unable to pass their own rising costs on to buyers. They were caught in a perilous margin squeeze between escalating input costs and falling farm-gate prices, a situation that threatens the long-term viability of a substantial portion of the industry. The high average market price, therefore, reflects the strength of the premium tier rather than the health of the entire sector.

1.2 The Climatic Imperative: A Harvest of Extremes

Climate change transitioned from a future threat to a present and powerful agent of market disruption in 2024. The historically low production volumes recorded across Europe were overwhelmingly attributed by leading industry bodies, including the International Organisation of Vine and Wine (OIV) and Copa-Cogeca, to "extreme climatic conditions and consequent disease pressure".[1] The year was not defined by a single type of weather event but by its sheer volatility and regional variability.

Some areas, particularly in the southern Mediterranean like parts of Spain and Southern Italy, continued to grapple with severe drought and hydric stress.[1] In stark contrast, many other key regions were inundated with unprecedented heavy rainfall, destructive hailstorms, and damaging spring frosts. Northern Italy, much of France, and Germany were particularly affected by these conditions, which not only directly damaged grapes but also created an ideal environment for fungal diseases.[1] Disease pressure, especially from downy mildew, became a critical factor in the catastrophic yield losses observed in France and Germany.[7]

This climatic volatility is actively reshaping the competitive landscape, creating clear annual "winners" and "losers" based on regional weather patterns. The dramatic divergence in the 2024 harvest outcomes illustrates this starkly: French production collapsed by a staggering 23.5%, while neighboring Spain, benefiting from a rebound in its largest region, saw its output increase by over 18%.[6] Even within countries, the impact was highly uneven. In Italy, central and southern regions posted double-digit production increases, while the north struggled against persistent rain and hail.[8]

This trend of increasing volatility is not an anomaly. The OIV has noted that after a period of relative stability, the variability in global wine production has been on the rise for the past 15 to 20 years, a phenomenon largely attributable to the increasing frequency of unpredictable and extreme weather events linked to climate change.[11] This establishes a new operational reality for the European wine sector. The market can no longer be viewed through the lens of predictable, stable production cycles. Climate has become a primary determinant of annual supply, capable of causing massive swings in national output and fundamentally reordering the production hierarchy from one year to the next. This paradigm shift demands that producers move from managing stability to managing extreme volatility, requiring unprecedented levels of agility, investment in adaptive viticulture, and sophisticated risk management strategies.

1.3 The State of Global Supply and Demand: A Fragile Equilibrium

On a global scale, the wine market in 2024 reached a state of fragile equilibrium, born not of strategic planning but of a dual crisis in production and consumption. Global wine production fell by 4.8% compared to 2023, settling at an estimated 225.8 mhl. This figure is alarmingly low, representing the smallest global output in over 60 years, since the devastating frosts of 1961.[1] This followed an already poor harvest in 2023, marking two consecutive years of severely constrained global supply.[17]

Simultaneously, global wine consumption continued its downward trajectory, contracting by a further 3.3% to an estimated 214.2 mhl.[3] This volume also represents a historic low, matching production's nadir by being the smallest since 1961.[2] The decline, which has been a consistent trend since 2018, was accelerated in 2024 by the combination of inflationary pressures on consumers and deep-seated shifts in lifestyle and social habits away from traditional wine consumption.[6]

The convergence of these two negative trends created a precarious market balance. The OIV noted that with production levels unlikely to significantly exceed demand, the two consecutive years of low output may help stabilize the global market by preventing a widespread price collapse that would have otherwise occurred with falling consumption.[4] However, this "negative equilibrium" is deceptive. It masks severe and growing regional and categorical imbalances. While the global numbers suggest a market approaching balance, the reality on the ground is a patchwork of acute shortages in some categories (e.g., premium white wines, certain sparkling wines) and damaging surpluses in others (e.g., mass-market red wines in regions like Bordeaux). These surpluses have become so chronic in some areas that they have necessitated large-scale, government-funded crisis distillation and vineyard grub-up schemes.[9] Therefore, the apparent global balance offers little comfort to producers struggling with oversupply and signals continued price volatility and uncertainty for buyers across all segments of the market.

Chapter 2: European Wine Production Landscape

The 2024 harvest dramatically reshaped the European wine production landscape, underscoring the profound impact of the year's climatic volatility. The EU, which remains the heart of global wine production, recorded its lowest output of the 21st century. The year was most notable for the starkly divergent fortunes of the continent's three largest producers: a historic collapse in France, a partial recovery in Italy that saw it reclaim the top production spot, and a significant rebound in Spain.

2.1 European Union (EU) Production Overview

Preliminary estimates for the 2024 vintage place total vinified production in the European Union at 138.3 mhl (excluding juices and musts), marking a 3.5% decrease from the already low volume of 2023.[1] The European farming union Copa-Cogeca offered a slightly higher estimate of 144 mhl, which still represents a decline of nearly 3% from the previous year and is 10% below the five-year average.[8] Regardless of the precise figure, the consensus is that the EU experienced its smallest harvest since the turn of the century, falling below the previous historic low set in 2017.[1]

Despite this contraction, the EU's central role in the global wine market remains undiminished. The bloc's output accounted for approximately 60% of the world's total wine production in 2024, a share that has remained remarkably consistent over the past decade.[7] This highlights the continent's structural importance to the global supply chain. However, the downward trend in volume, driven by the dual forces of climate change and planned structural adjustments such as vineyard removals, signals a future of increasingly constrained and volatile supply from Europe.

2.2 National Production Analysis: A Tale of Three Titans

The overarching story of the 2024 harvest was the dramatic reordering of Europe's traditional production hierarchy. The contrasting results in Italy, France, and Spain reveal a market being reshaped not by gradual trends, but by acute, climate-driven events.

Italy: Reclaiming the Top Spot

Italy regained its position as the largest wine producer in the EU and the world in 2024, with production estimates ranging from 41.0 mhl to 44.1 mhl.[6] This represents a substantial increase of between 7% and 15% compared to the nation's disastrous 2023 harvest, which was severely impacted by fungal diseases.[6] However, this rebound should be viewed in context. The 2024 volume, while a significant improvement, still falls notably short of Italy's five-year average, registering a deficit of between 6% and 13%.[6] The recovery was geographically uneven, reflecting the varied climatic conditions across the peninsula. Central Italy saw the most dramatic bounce-back with a projected 29.1% rise in output, followed by the South and Islands with a 15.6% increase. In contrast, Northern Italy, which contended with hailstorms and heavy spring rains, saw only a modest 0.6% increase in production.[8]

France: A Historic Production Collapse

France experienced a catastrophic production collapse in 2024, with output plummeting to between 36.1 mhl and 37.4 mhl.[6] This represents a decline of approximately 23% compared to 2023 and marks the country's lowest production volume since 1957.[6] The financial impact was equally severe. The total value of French wine production fell by an estimated 21.7% to €12.2 billion in 2024, single-handedly contributing a negative 3.6 percentage points to the change in France's total agricultural output value for the year.[22] The primary cause of this historic failure was a relentless series of adverse weather events that affected nearly every wine region. Vineyards battled against spring frosts, continuous and heavy rains that impeded flowering, and widespread, severe outbreaks of mildew and hail, which decimated potential yields.[8]

Spain: A Significant Rebound

Spain's wine production saw a significant rebound in 2024, with output rising by approximately 18% to a volume estimated between 33.6 mhl and 38.1 mhl.[7] This strong performance was largely driven by the country's vast central plateau, Castilla-La Mancha, which accounts for more than half of Spain's total production and recorded a remarkable 23% year-on-year increase.[8] This rebound in the heartland compensated for continued struggles in other regions, such as Catalonia, which continued to suffer from the effects of prolonged drought.[8] As with Italy, Spain's recovery must be contextualized; despite the impressive annual growth, the total national output for 2024 remained approximately 4% below its five-year average.[7]

2.3 Performance of Other Key Producers

The challenges of 2024 were not confined to the top three producers. Other key European wine nations also faced difficult harvests, with Germany and Portugal experiencing significant volume declines.

- **Germany:** The 2024 harvest was exceptionally difficult, with production declining by 6% to 9% to a volume of around 7.9 to 8.1 mhl.[7] This marks the country's lowest harvest since 2017 and is 12% below the 2018-2023 average.[26] The decline was driven by severe weather, including late frosts and heavy summer rainfall that led to intense disease pressure. The impact was particularly devastating in smaller eastern regions like Saxony and Saale-Unstrut, which reported catastrophic yield reductions of up to 80%.[8]

- **Portugal:** Production volume decreased by approximately 8% in 2024, falling to 6.9 mhl.[7] Unlike its peers, however, this reduced volume was in line with Portugal's five-year average, suggesting a more stable production base relative to recent performance.[7]
- **Romania and Austria:** These nations also suffered significant setbacks. Romania's production was forecast to drop by 20-25%, while Austria faced a decline of around 19%. These losses were primarily attributed to a combination of spring frosts, drought, and other challenging weather conditions during the growing season.[7]

The following table summarizes the production volumes for the EU's top five producing countries, illustrating the dramatic shifts that defined the 2024 vintage.

Table 1: European Wine Production by Key Country, 2023 vs. 2024 (Volume)

Country	2023 Production (mhl)	2024 Production (mhl)	Change (mhl)	% Change vs. 2023	% Change vs. 5-Year Avg.	Source(s)
Italy	38.3	41.0	+2.7	+7.0%	-13%	7
Spain	28.4	33.6	+5.2	+18.3%	-4%	7
France	47.9	36.9	-11.0	-23.0%	-16%	7
Germany	8.6	8.1	-0.5	-5.8%	-5%	7
Portugal	7.5	6.9	-0.6	-8.0%	0%	7
EU Total	143.8 (approx.)	139.0	-4.8	-3.3%	-11%	7

Note: Figures are based on OIV preliminary estimates from November 2024 for consistency. Other sources provide slightly different but directionally consistent figures. Value data is too fragmented for a comprehensive comparative table but is discussed in the text.

Chapter 3: Evolving Consumption Patterns in Europe

The demand side of the European wine market in 2024 was characterized by the continuation and acceleration of a long-term structural decline. Total consumption volumes fell to levels not seen in decades, driven by a combination of economic pressures on households and a profound evolution in consumer tastes and demographics. This chapter analyzes the key trends in consumption, including the shift away from red wines and the paradoxical resilience of market value amidst falling volumes.

3.1 Total and Per Capita Consumption Trends

Total wine consumption in the European Union for 2024 is estimated at 103.6 mhl. This represents a significant decrease of 2.8% from 2023 and is 5.2% below the five-year average, confirming a persistent downward trend.[1] The EU, which accounts for 48% of the world's total wine consumption, is at the epicenter of a global demand contraction that has seen consumption fall to its lowest point since 1961.[1]

The decline was evident across most of the EU's major markets:

- **France**, while remaining the largest consumer in the EU, saw its consumption fall by 3.6% to 23.0 mhl.[1]
- **Germany**, the third-largest market, experienced a significant decline of 3.0%, with consumption dropping to 17.8 mhl.[1]
- **Italy**, the second-largest market, proved to be an exception, with consumption remaining stable at 22.3 mhl (+0.1% vs 2023).[1]
- **Spain** and **Portugal** also bucked the trend, showing modest increases of 1.2% (to 9.9 mhl) and 0.5% (to 5.6 mhl) respectively.[3]

Per capita consumption figures further illuminate these trends. Portugal continues to lead the world in per capita consumption at a remarkable 61.1 litres per inhabitant, followed by Italy (42.7 L) and France (41.5 L).[30] In contrast, German per capita consumption for individuals aged 16 and over fell from 22.5 litres in 2023 to 22.2 litres in 2024, reflecting the broader market contraction.[12] The sustained decline in Europe's largest and most traditional markets, particularly France and now Germany, indicates that the demand crisis is not a temporary phenomenon but a deep-seated structural shift.

3.2 The Shifting Palate: Red's Decline and the Rise of White, Rosé, and Sparkling

The overall decline in wine consumption is not uniform across categories; it is disproportionately affecting red wines. This reflects a fundamental and ongoing shift in consumer preferences toward styles perceived as lighter and fresher. Globally, red wine consumption has fallen by 15% from its peak in 2007, whereas consumption of white wines has increased by 10% over the same period.[31]

This trend was particularly visible in France in 2024, where sales of red wine in supermarkets—a key volume channel—were markedly down.[10] In contrast, white wines, rosés, and especially sparkling wines demonstrated greater resilience. The surge in imports of Italian Prosecco into the French market is a powerful indicator of this shift. Consumers, particularly younger demographics, are increasingly turning to Prosecco as a more accessible and cost-effective alternative to Champagne for everyday celebrations and aperitifs, challenging the traditional dominance of French sparkling wine.[10]

This is not merely a cyclical change in fashion but a structural evolution in taste. The preference for "lighter, fresher styles" has profound implications for Europe's viticultural landscape.[10] Regions historically and economically built on the production of red wine, such as Bordeaux, now face a critical mismatch between their primary product and current market demand. This disconnect exacerbates existing problems of oversupply and puts immense pressure on these regions to either innovate their product offerings—for example, by increasing production of white and rosé wines—or to reduce their production capacity through measures like vineyard removals.

3.3 The Value Proposition: The "Premiumization" Paradox

Despite the sharp decline in consumption volumes, the overall value of the European wine market has shown remarkable resilience. One estimate valued the market at USD 78.5 billion in 2024, with forecasts projecting a compound annual growth rate (CAGR) of 4.1% through 2033.[5] Other analyses suggest an even larger market size, with some placing the European wine market at over USD 231 billion in 2024.[32]

This apparent paradox—falling volumes alongside stable or growing value—is explained by two interconnected trends: high average prices driven by supply shortages in some categories, and a behavioral shift often termed "premiumization" or "drinking less, but better".[11] A significant segment of the consumer base, while reducing the frequency of consumption, is simultaneously trading up to higher-quality, higher-priced wines. This behavior supports the total market value, compensating for the loss of volume at the lower end.

The market is therefore undergoing a distinct polarization. At one end, the premium and super-premium segments are thriving, driven by connoisseurs and a focus on quality and provenance. At the other end, a large and highly price-sensitive consumer segment is driving demand for value-oriented products, including bulk wine and accessible imports like Prosecco. This dynamic places immense pressure on the mid-range category, which is being squeezed from both sides. Wineries that are unable to compete in the premium space or at the lowest price points risk being left behind in an increasingly divided market.

Table 2: European Wine Consumption by Key Country, 2023 vs. 2024 (Volume)

Country	2023 Consumption (mhl)	2024 Consumption (mhl)	% Change vs. 2023	2024 Per Capita (Litres)	Source(s)
France	23.8	23.0	-3.6%	41.5	1
Italy	22.3	22.3	+0.1%	42.7	1
Germany	18.4	17.8	-3.0%	22.2	1
Spain	9.8	9.9	+1.2%	~20.4*	3
United Kingdom	12.8	12.6	-1.0%	~18.5*	3
Portugal	5.5	5.6	+0.5%	61.1	3
EU Total	106.6	103.6	-2.8%	~23.1*	1

Note: Per capita figures marked with an asterisk () are calculated using OIV consumption data and Eurostat 2024 population data for illustrative purposes.33*

Chapter 4: International Trade Dynamics

International trade was a critical, albeit complex, arena for the European wine sector in 2024. With domestic consumption declining and production volumes constrained, exports became the essential lever for maintaining market value. The year was defined by a clear strategy of prioritizing value over volume, as producers leveraged the scarcity of certain wines to command record-high prices on the global stage. This chapter analyzes Europe's export performance, the shifting dynamics among its major importing nations, and its trade relationships with key partners outside the EU.

4.1 European Export Performance: Value Over Volume

The global wine trade in 2024 was characterized by stagnant volumes but robust value, a trend driven almost entirely by European exporters. The total volume of wine traded internationally was 99.8 mhl, a figure nearly identical to 2023 (-0.1%) but 5% below the five-year average.[3] Despite this lack of volume growth, the total value of these exports reached an impressive €35.9 billion, only a marginal 0.3% decrease from the previous year.[3]

The key to this financial resilience was price. The global average export price held steady at the record high of €3.60 per litre, a level first reached in 2023 and representing a nearly 30% increase over pre-pandemic prices.[3] For the EU specifically, extra-bloc exports of wine generated €16.8 billion in revenue.[35] This data clearly demonstrates that the European export strategy in 2024 was one of value preservation. Faced with lower production inventories and weakening domestic demand, producers and exporters successfully leveraged the global demand for and scarcity of premium European wines to maintain high prices, which was crucial in preventing a more severe revenue decline for the sector as a whole.

4.2 Key Exporter Analysis

The performance of Europe's leading wine-exporting nations varied significantly, reflecting their different production outcomes and product mixes.

- **France:** Maintained its undisputed leadership as the world's top exporter by value, generating €11.7 billion in revenue. However, this represented a 2.4% decline from 2023. Export volumes remained stable at 12.8 mhl (+0.7%).[3] The drop in value was largely driven by a weak performance in the high-value sparkling wine category, which saw its export value fall by 6.5%.[3]

- **Italy:** Had a stellar year in exports, solidifying its position as the world's largest exporter by volume with shipments of 21.7 mhl, a 3.2% increase over 2023. This volume growth was matched by a strong 5.6% increase in value, which reached €8.1 billion.[3] The performance was propelled by the continued global success of sparkling wines, particularly Prosecco (+12% in volume, +8.9% in value), and healthy growth in bottled still wines (+4.1% in volume, +4.8% in value).[3]
- **Spain:** Faced a challenging year in terms of volume, with exports falling by 4.5% to a decade-low of 20.0 mhl, a decline driven primarily by a reduction in lower-priced bulk wine shipments. Despite this, Spain executed a successful pivot toward higher-value products, as its total export value increased by 1.4% to €3.0 billion.[3]
- **Portugal:** Demonstrated strong export growth, with volume increasing by 8.7% to 3.5 mhl and value rising by 4.5% to reach the €1.0 billion mark. This growth was seen across both EU and non-EU markets.[3]

4.3 Major Import Markets in Europe

The import landscape within Europe reflected the continent's overall decline in consumption, with most major markets reducing their intake.

- **Germany:** As the world's largest wine importer by volume, Germany's sharp decline in imports had a significant market impact. Import volume dropped by a steep 6.9% to 12.7 mhl, the lowest level recorded in two decades. The value of these imports also fell significantly by 8.8% to €2.5 billion.[3]
- **United Kingdom:** The UK market showed more resilience. Import volumes actually increased by 2.4% to 12.6 mhl. However, value decreased slightly by 0.7% to €4.6 billion, suggesting some down-trading or a shift in the product mix towards more affordable wines.[3]
- **France:** Mirroring its domestic consumption crisis, France's wine imports fell sharply. Volume dropped by 9.7% to 5.4 mhl, the country's lowest import level since 2016. This was primarily due to a large reduction in bulk wine imports.[3]
- **Netherlands:** This key trading hub also saw a significant contraction in demand, with import volumes falling by 10.7%.[3]

4.4 Key Extra-EU Trading Partners

Europe's trade relationships with key partners outside the bloc were crucial for sustaining export value.

- **United States:** The USA remains the most important destination for EU wine exports by a large margin. In 2024, the EU exported €4.9 billion worth of wine to the US, out of a total of €8.9 billion in alcoholic beverages.[35] The US is the single most lucrative market for the top European producers, including France, Italy, and Germany.
- **United Kingdom:** As the second-largest trade partner, the UK imported €3.3 billion worth of wine from the EU in 2024.[35]
- **China:** The Chinese market proved to be challenging in 2024. After a period of growth, demand contracted, with EU exports falling significantly. French wine exports to China, for example, were down 17%.[10] This was attributed to both internal market difficulties in China and the re-entry of Australian wines into the market after the lifting of tariffs.

The table below provides a comparative overview of the export performance of the top five EU wine exporters in 2024.

Table 3: Top 5 EU Wine Exporters, 2023 vs. 2024 (Volume, Value, Avg. Price)

Country	Export Volume 2024 (mhl)	% Change vs 2023	Export Value 2024 (€ bn)	% Change vs 2023	Avg. Price 2024 (€/L)	Source
Italy	21.7	+3.2%	8.1	+5.6%	3.73	3
Spain	20.0	-4.5%	3.0	+1.4%	1.50	3
France	12.8	+0.7%	11.7	-2.4%	9.14	3
Portugal	3.5	+8.7%	1.0	+4.5%	2.86	3
Germany	3.1	-4.7%	1.0	-4.3%	3.23	3

Chapter 5: Structural Evolution of European Viticulture

Beyond the annual fluctuations in production and sales, the European wine sector is undergoing a profound long-term structural evolution. This transformation is visible in the physical footprint of its vineyards and in the changing demographics of its producers. The pressures of 2024 have acted as a powerful catalyst, accelerating trends toward vineyard rationalization and industry consolidation that have been underway for years.

5.1 The Shrinking Vineyard: A Slow but Steady Decline

The total surface area dedicated to viticulture in the European Union continued its gradual contraction in 2024, reaching a total of 3.2 million hectares (mha). This represents a decrease of 0.8% compared to the previous year.[3] This trend is part of a consistent global decline, with the world's total vineyard area shrinking by 0.6% to 7.1 mha, the fourth consecutive year of reduction.[3]

This decline is being driven by a combination of market forces and deliberate policy. In regions facing chronic oversupply, particularly of red wine, governments and industry bodies have implemented "grub-up" schemes to pay growers to remove vines. These programs, notably active in French regions like Bordeaux, are a direct structural response to the long-term decrease in consumption and are actively contributing to the reduction in total vineyard area.[9]

The trend is observable across most of Europe's major wine-producing nations:

- **Spain** continues to possess the world's largest vineyard area, but its surface shrank by 1.5% in 2024 to 930,000 hectares (kha).[3]
- **France**, the second largest, saw a 0.7% reduction to 783 kha.[3]
- **Portugal** experienced a more significant decline of 5.1% to 173 kha.[3]
- **Germany**'s vineyard area decreased slightly by 0.4% to 103 kha.[3]
- **Italy** stands as the sole major exception to this trend. The country's vineyard area continued to expand, growing by 0.8% to 728 kha, making it the only one of the world's top seven wine-growing nations to record positive growth in 2024.[3]

This slow but steady rationalization of vineyard area is a necessary, albeit often painful, adjustment to bring long-term supply potential more in line with evolving demand. This trend is expected to continue, and likely accelerate, in regions with a structural surplus of wine styles that have fallen out of favor with modern consumers.

5.2 The Consolidation of Producers: A Sector Under Strain

The number of wine producers in Europe has been in decline for over a decade, a trend that the acute pressures of 2024 have significantly accelerated. While comprehensive census data for 2024 is not yet available, the most recent survey from Eurostat provides a crucial baseline. In 2020, there were **2.2 million vineyard holdings** in the EU.[37] This figure already represented a 10.3% reduction—a loss of 257,000 holdings—from just five years prior in 2015.[37] The vast majority of these holdings are very small, with 83.3% cultivating less than one hectare.[38]

The "polycrisis" of 2024 appears to be acting as a powerful catalyst for further and faster consolidation. The combination of historically low yields, falling domestic demand, and persistently high operating costs has created an environment where smaller, less-capitalized, and less-diversified producers are struggling to remain viable. This is not merely anecdotal; specific indicators from 2024 point to an industry under severe strain:

- In **France**, a total of 211 wineries declared bankruptcy in 2024. This figure represents a dramatic **55% increase** over the 136 insolvencies recorded in 2023, signaling a sharp deterioration in financial health for many producers.[39]
- In **Italy**, the number of wineries continued its downward trend, declining to approximately 30,000 as the sector continues to consolidate.[40]
- In **Spain**, there are currently over 4,300 wineries, with a notable trend towards organic certification, which now applies to over 1,300 of them.[41]

The narrative emerging from this data is clear. The long-term, gradual decline in the number of European wine producers is transitioning into a more acute phase of market exit and consolidation. The extreme challenges of 2024 are accelerating this pre-existing trend, favoring larger, more financially resilient entities and cooperatives that can better absorb climatic and economic shocks.[10] The structure of European viticulture is actively being reshaped, with a likely outcome of fewer, but larger and more professionally managed, vineyard holdings in the years to come.

Table 4: Evolution of Vineyard Area in Key EU Countries, 2023 vs. 2024

Country	Vineyard Area 2023 (kha)	Vineyard Area 2024 (kha)	% Change vs. 2023	Source(s)

Spain	945	930	-1.5%	3
France	788	783	-0.7%	3
Italy	723	728	+0.8%	3
Portugal	182	173	-5.1%	3
Germany	104	103	-0.4%	3
EU Total	3,226 (approx.)	3,200	-0.8%	3

Chapter 6: Market Outlook and Strategic Recommendations

The European wine market emerges from the crucible of 2024 transformed and facing a new set of strategic imperatives. The convergence of climatic, economic, and social pressures has accelerated long-term trends and exposed deep structural vulnerabilities. However, it has also highlighted pathways to resilience and future growth. This concluding chapter synthesizes the report's findings to provide a forward-looking perspective and actionable recommendations for stakeholders across the industry.

6.1 Forecast and Future Trends

The outlook for the European wine market is one of continued transformation, defined by several key trends:

- **Value Growth Amidst Volume Stagnation:** Despite the challenges to production and consumption volumes, the overall value of the European wine market is projected to continue its upward trajectory. This growth will be fueled by the ongoing premiumization trend, where higher average prices for premium, appellation-driven, and sparkling wines compensate for lower volumes in mass-market segments.[5]
- **Persistent Climatic Volatility:** The extreme weather events of 2024 are not an anomaly but the "new normal." Climate-induced production volatility will remain a

defining feature of the market, demanding enhanced risk management, greater investment in adaptive viticulture, and more flexible supply chains from all industry players.

- **Deepening Demand Polarization:** The bifurcation of the consumer market will intensify. The gap between highly price-sensitive consumers seeking value and a more engaged cohort "drinking less but better" will widen. This necessitates highly segmented marketing and product strategies that can cater to both ends of the spectrum.
- **The Rise of NoLo (No-and-Low-Alcohol):** The growing consumer interest in health and wellness will continue to fuel the expansion of the no-and-low-alcohol beverage category. This presents both a significant threat to traditional wine's market share and a critical opportunity for innovation and portfolio diversification for producers willing to adapt.[5]

6.2 Key Challenges

Navigating the future will require confronting several fundamental challenges:

- **Climate Adaptation:** The single greatest long-term challenge is adapting viticultural practices to withstand the impacts of climate change. This involves not only managing acute events like frost and hail but also addressing chronic issues like water scarcity and rising temperatures to ensure consistent quality and yield.
- **Managing Regional and Categorical Surpluses:** The structural oversupply of certain wine types, most notably red wines from regions like Bordeaux, remains a critical problem. Addressing this imbalance will require difficult but necessary strategic decisions, including further vineyard rationalization and a potential reimagining of regional product identities.
- **Engaging the Next Generation of Consumers:** The industry faces an existential challenge in connecting with younger consumers (Millennials and Gen Z). This demographic has a lower overall affinity for wine, different consumption habits, and a value system that prioritizes sustainability, authenticity, and digital engagement. Failure to capture their interest will guarantee a continued long-term decline in consumption.[31]

6.3 Strategic Opportunities

Amidst the challenges, significant opportunities exist for agile and forward-thinking stakeholders:

- **Leveraging Appellation Power and Premiumization:** The strength of Europe's Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI) systems remains a powerful asset. These appellations are synonymous with quality and provenance, allowing producers to command premium prices in export markets and tap into the "drink better" trend.
- **Sustainability as a Core Value Proposition:** The growing consumer demand for organic, biodynamic, and sustainably produced wines is a major opportunity. Producers who can credibly demonstrate their commitment to eco-friendly practices—from the vineyard to the packaging—can create significant brand differentiation and added value.[5]
- **Expanding Digital and Direct-to-Consumer (DTC) Channels:** The resilience of Germany's DTC channel during the 2024 downturn highlights the strategic importance of digital sales.[43] E-commerce and DTC models allow producers to bypass traditional distribution bottlenecks, build direct relationships with consumers, capture higher margins, and gather valuable market data.
- **Developing Immersive Wine Tourism:** In a market where consumers increasingly seek authentic experiences, wine tourism offers a powerful tool for brand building and a valuable alternative revenue stream. Creating immersive cellar door experiences can forge lasting connections with consumers that translate into brand loyalty and sales.[5]

6.4 Recommendations for Stakeholders

Based on the analysis of the 2024 market, the following strategic recommendations are proposed:

- **For Producers:**
  - **Diversify Portfolios:** Actively shift production toward categories with growing demand, including white, rosé, and sparkling wines. Explore innovative products, including premium NoLo offerings.
  - **Invest in Resilience:** Prioritize investments in climate-resilient viticulture, including drought-resistant rootstocks, advanced water management systems, and protective measures against frost and hail.

    - **Embrace Digital:** Strengthen or establish DTC and e-commerce channels to build brand loyalty and reduce reliance on traditional distribution.
- **For Distributors and Importers:**
    - **Focus on Resilient Categories:** Curate portfolios that emphasize high-demand segments like premium sparkling, white, and rosé wines, while carefully managing inventory risk for declining categories.
    - **Build Flexible Supply Chains:** Develop relationships with producers across a wider range of regions to mitigate the risk of climate-induced supply shocks in any single area.
    - **Champion Sustainability:** Actively seek out and promote producers with strong and verifiable sustainability credentials, as this is an increasingly important purchasing driver for consumers.
- **For Investors:**
    - **Identify Consolidation Opportunities:** Look for investment opportunities in well-managed larger entities, cooperatives, or brands that are poised to gain market share as the industry consolidates.
    - **Prioritize Climate Risk Assessment:** Make climate risk a primary due diligence factor in any long-term investment in viticultural assets. Evaluate a region's and a producer's exposure and adaptation strategies to extreme weather.
    - **Support Innovation:** Invest in companies and technologies that are providing solutions to the industry's key challenges, from precision viticulture and water management to innovative packaging and DTC platforms.

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