



REPORT

Global Wine in the Food Channel: Navigating a Market in Transition – 2024 Annual Report

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Executive Summary

The global wine sector in 2024 navigated a year of profound challenges and complex transitions, culminating in a market state defined by a tense and potentially fragile equilibrium. The industry witnessed a historic contraction in consumption volumes, reaching levels not seen in over six decades, while simultaneously maintaining a surprisingly resilient market value, propped up by record-high average prices. This fundamental decoupling of volume and value stands as the central paradox of 2024, signaling deep structural shifts rather than a cyclical downturn. This report provides an exhaustive analysis of the global wine market's performance within the Food Channel—the critical arena of supermarkets, specialty stores, and other retail outlets where the majority of wine is sold for at-home consumption.

The primary drivers of this market transformation are multifaceted. Persistent macroeconomic pressures, including stubborn inflation across the supply chain, have eroded consumer purchasing power and forced a re-evaluation of discretionary spending. Concurrently, a powerful and accelerating cultural shift towards health, wellness, and alcohol moderation, particularly among younger legal-drinking-age cohorts, is structurally shrinking the traditional consumer base. Wine now faces unprecedented competition not only from other alcoholic beverages like Ready-to-Drink (RTD) products and craft spirits but also from a burgeoning no- and low-alcohol category.

Amid these pressures, several key trends have crystallized within the Food Channel, defining the strategic battleground for 2025 and beyond:

- **Historic Volume Contraction:** Global wine consumption is estimated to have fallen to a 60-year low of 214.2 million hectoliters in 2024. This decline, mirrored by a historically small global harvest, has created a precarious market balance driven by scarcity rather than robust demand. The Food Channel, as the primary point of sale, has been at the epicenter of this volume decline, with major markets like the U.S., France, and the UK all registering significant drops in retail sales volume.
- **The Great Color Shift:** A fundamental rebalancing of consumer preference from red wines towards white and rosé styles has accelerated dramatically. This trend, driven by a move toward lighter, more refreshing options suitable for a wider range of non-meal occasions, is now a dominant force in major retail markets. White wine has surpassed red in volume in many key regions, and its greater resilience is a critical feature of the current landscape.
- **The Premiumization Paradox:** The Food Channel has become the key arena for a complex consumer behavior pattern. While the "less but better" trend continues, with consumers willing to pay more per bottle for perceived quality, economic pressures are simultaneously driving a search for value. This has led to a polarization of the market, with growth at the premium (>\$20) and value/private-label tiers, and a "hollowing out" of the mid-market. Wines priced in the intermediate range face immense pressure, lacking a clear value proposition for either the cost-conscious or the experience-seeking consumer.
- **Strategic Imperatives for a New Era:** The confluence of these trends necessitates a decisive strategic response from all industry stakeholders. For producers, importers, and distributors, success in the Food Channel will no longer be achieved through incremental adjustments but through bold adaptation. Key imperatives for 2025 include a fundamental portfolio realignment to capitalize on the color shift, the development of a clear price-tier strategy that decisively targets either value or premium, and the adoption of innovative packaging and authentic brand storytelling—particularly around sustainability—to connect with a fragmented and discerning consumer base.

This report will deconstruct these global dynamics, providing detailed regional and country-level analysis, a granular breakdown of category performance at retail, and a forward-looking strategic outlook designed to equip wine industry professionals with the data and understanding required to navigate this new and challenging market landscape.

Section 1: The 2024 Global Wine Market Landscape: A New, Tense Equilibrium

The global wine industry in 2024 was characterized by a complex interplay of climatic, economic, and social forces that have reshaped the foundations of supply and demand. The year will be remembered not for growth, but for a tense market rebalancing, where historic lows in production and consumption created a fragile stability. Before delving into the specific performance within the retail environment, it is essential to understand this overarching context, which sets the stage for the challenges and opportunities present on the supermarket shelf.

1.1 Introduction: Defining the Food Channel

For the purposes of this analysis, the "Food Channel" (also referred to as the retail or off-trade channel) encompasses all physical points of sale where the end consumer purchases wine for private or domestic consumption. This includes a broad spectrum of outlets: supermarkets and hypermarkets, neighborhood or local stores, specialty wine and liquor stores, department stores, discount stores, traditional commerce, municipal markets, and convenience stores.

Crucially, this report's scope deliberately excludes all online, digital, or e-commerce channels. While the online channel has grown in importance, the physical retail environment remains the bedrock of the global wine market, representing the vast majority of sales volume and value. According to market analysis from Grand View Research, the off-trade distribution channel commanded a dominant revenue share of 77.9% of the global wine market in 2024.¹ In the world's largest market, the United States, this figure is similarly high, with off-trade channels accounting for over 68.5% of the market.² This overwhelming share underscores the critical importance of understanding the dynamics within this specific channel. The supermarket aisle, the wine shop display, and the convenience store cooler are where most consumer decisions are made, making the Food Channel the primary battleground for brand visibility, market share, and profitability.

1.2 The Great Decoupling: Volume Contraction vs. Value Resilience

The defining narrative of the 2024 global wine market is a stark decoupling of its two most fundamental metrics: volume and value. While the amount of wine being consumed plummeted to historic lows, the total monetary value of the market demonstrated remarkable, if misleading, resilience.

Global wine consumption in 2024 is estimated to have contracted by a significant 3.3% from 2023's already low levels, settling at a preliminary figure of 214.2 million hectoliters (mhl).³ This figure represents the lowest global consumption volume recorded since 1961, marking a nadir for the industry unseen in over two generations.⁵ This is not a one-year anomaly but the continuation of a worrying downward trend that has been in place since 2018, exacerbated by the global economic climate.⁸

This slump in demand was met by an equally dramatic crisis on the supply side. For the second consecutive year, extreme and unpredictable climatic conditions—from late frosts and heavy rains to severe droughts and subsequent disease pressure—ravaged vineyards in both the Northern and Southern Hemispheres. The result was a global wine production figure of just 225.8 mhl, a 4.8% decrease from the previous year and the smallest global harvest in over 60 years.³

In a conventional market, such a concurrent collapse in both supply and demand would signal a deep structural crisis. However, the value metrics of 2024 tell a different story. The total value of global wine exports held remarkably firm at an estimated €35.9 billion, dipping by a mere 0.3% compared to the record set in 2023.³ This stability was achieved because the average price of exported wine remained at the all-time high of €3.60 per liter, a level first reached in 2023 and nearly 30% above pre-pandemic prices.⁴

This phenomenon reveals that the market's apparent equilibrium is not a sign of health but a consequence of scarcity. The International Organisation of Vine and Wine (OIV) notes that two consecutive years of low production have effectively rebalanced the market by bringing supply down to meet the structurally weakened demand.⁴ This is a supply-driven, not a demand-led, equilibrium. It is a fragile balance propped up by external shocks (climate change) and inflationary pressures, not by strong consumer fundamentals. This situation presents a significant latent risk for the industry. Should a future harvest return to normal or above-average yields, the market could be instantly flooded with an oversupply that the diminished consumer base cannot absorb, potentially leading to a sharp and painful price correction. Producers and distributors

who have become accustomed to high unit prices to cover their own inflated costs are in a particularly precarious position, as the underlying volume base has fundamentally eroded.

1.3 The Macro-Economic Headwinds: Inflation and Shifting Lifestyles

The precipitous decline in wine consumption volume is not occurring in a vacuum. It is the result of powerful macroeconomic and societal forces that are fundamentally reshaping consumer behavior. Two primary headwinds defined the market in 2024: persistent inflation and a profound shift in lifestyle and health priorities.

First, the global inflationary environment that began in 2022 continued to exert pressure throughout the wine value chain. Increased costs for energy, raw materials (such as glass bottles and labels), and transportation were passed from producers to distributors and finally to retailers, resulting in higher shelf prices for consumers.³ This occurred at a time when consumers themselves were grappling with diminished purchasing power due to the rising cost of living. As households tightened their budgets, discretionary spending on non-essential items like wine was often curtailed. This economic squeeze has made consumers more cautious, selective, and price-sensitive, directly contributing to the reduction in purchase frequency and volume.¹¹

Second, and perhaps more structurally significant, is the accelerating cultural shift towards alcohol moderation. This trend, often termed "sober curiosity," is particularly pronounced among younger legal-drinking-age consumers, namely Millennials and Gen Z.¹¹ Movements like "Dry January" have moved from niche to mainstream, and a growing consciousness around health and wellness is leading many to actively reduce their alcohol intake.¹¹ This behavior is reinforced by public health messaging from influential bodies like the World Health Organization (WHO), which has promoted the message that "there is no safe amount of alcohol," a stance that resonates strongly with health-conscious individuals.¹¹

This moderation trend is compounded by intensified competition from other beverage categories that are capturing the attention, and wallets, of these younger demographics. The convenience, novel flavors, and modern branding of Ready-to-Drink (RTD) beverages, alongside the dynamism of craft spirits and craft beer, have created a much more crowded and competitive field for a consumer's

"share of throat".¹¹ Wine, often perceived as more traditional or requiring more knowledge, is losing occasions to these more accessible alternatives, especially in non-food-related social settings. Together, these economic and lifestyle headwinds have created a perfect storm, driving the structural decline in wine consumption volume that defined 2024.

Table 1: Global Wine Market: Key Metrics Overview (2023 vs. 2024)

This table provides a top-line snapshot of the global situation, using OIV data as the primary source to illustrate the core themes of the section. It serves as a foundational reference for the entire report.

Metric	2023	2024 (Preliminary)	% Change (2024 vs. 2023)
Total Consumption (mhl)	221.0	214.2	-3.3%
Total Production (mhl)	237.3	225.8	-4.8%
Total Export Volume (mhl)	99.9	99.8	-0.1%
Total Export Value (bn EUR)	€36.0	€35.9	-0.3%
Average Export Price (EUR/l)	€3.60	€3.60	0.0%

Source: OIV State of the World Vine and Wine Sector in 2024 ³

The data in Table 1 starkly quantifies the "Great Decoupling" that characterized the 2024 market. The significant negative change in both consumption and production volumes stands in sharp contrast to the near-zero change in export volume, value, and average price. This visualization reinforces the central tension of the year: a market where volume is in crisis, but value is being artificially sustained by a combination of low supply and high prices. This sets the stage for a deeper investigation into how these global pressures are manifesting within the critical retail environments of key countries.

Section 2: Deep Dive: Regional and Country-Level Analysis in the Food Channel

While global data provides a crucial overview, the true dynamics of the wine market are revealed at the national and regional levels. The macro trends of volume decline, price polarization, and shifting consumer preferences are not uniform; they manifest with unique intensity and character in different markets. This section provides a deep dive into the performance of wine within the Food Channel of the world's most significant consuming countries, analyzing how these global forces are shaping the reality on the retail shelf.

2.1 North America: The U.S. Market Under Pressure

The United States continues to hold its position as the world's single largest wine-consuming market by total volume, making its performance a bellwether for the global industry. However, in 2024, the U.S. market was not immune to the pressures sweeping the sector, experiencing a significant contraction that highlights its vulnerability to the same headwinds affecting mature European markets.

Consumption Decline and Channel Dynamics

In 2024, U.S. wine consumption saw a notable decline, with the OIV estimating a 5.8% drop to 33.3 million hectoliters.⁶ Other industry analysts place the decline in a similar range, from 3% to 5%.¹⁸ This contraction is also reflected at the individual level, with per capita consumption continuing its downward trend, falling from a peak of over 10 liters per person to an estimated 9.8 liters in 2024.¹

The Food Channel, or off-premise sector, is the undisputed heavyweight in the U.S. wine market, accounting for over 68.5% of sales.² This makes retail performance a critical indicator of the market's overall health. Here, the data paints a challenging picture. According to NielsenIQ's 2024 year-in-review, wine suffered the steepest declines among all major alcohol categories in off-premise channels, falling 3.5% in

value and a stark 5.3% in volume.²⁰ Data from the Wine & Spirits Wholesalers of America (WSWA) corroborates this, reporting an 8% decline in wine sales from wholesalers to retailers for the 12-month period ending in August 2024.²¹ This indicates that wine is losing shelf space and consumer interest relative to spirits and resilient segments of the beer market.

The Premiumization Paradox in U.S. Retail

The U.S. Food Channel is the primary stage for the "premiumization paradox," a complex consumer behavior where the market polarizes towards opposite ends of the price spectrum. While overall volume is shrinking, the premium segment has shown remarkable resilience, a phenomenon driven by the "less but better" ethos.

Analysis from BMO's 2024 wine market report found that wineries with an average bottle price of more than \$20 significantly outperformed those priced below \$20.²³ Specifically, the median sales increase for wines in the \$20 to \$50 price bracket was 12%, double the rate of growth for wines under \$20.²³ Retail scan data from NIQ further illuminates this trend, showing that the \$20-\$24.99 price tier was a key growth driver in off-premise sales, while wines priced over \$25 remained relatively flat, a strong performance in a declining market.²⁴

Conversely, the value and lower-mid-price tiers are experiencing a severe contraction. The same NIQ data revealed that wines priced between \$8 and \$10.99 saw the greatest declines, falling nearly 9%.²⁴ SipSource data echoes this, with the \$8-\$10.99 segment dropping by 12.7% across all channels.²¹ This bifurcation is leading to a "hollowing out" of the mid-market. Consumers entering a supermarket are either trading up to a premium bottle for an at-home experience or trading down to a value-oriented option for everyday consumption. The vast middle ground, once the backbone of the market, is shrinking as it struggles to offer a clear proposition to either consumer mindset.

The Color Shift in U.S. Retail

Nowhere is the global "Great Color Shift" more apparent than on the shelves of U.S.

retailers. The long-held dominance of red wine has been decisively challenged and, in many metrics, overturned by the rise of white wine. Market.us data for 2024 shows white wine capturing a dominant market share of over 52.2% in the U.S..²

This shift is driven by a confluence of factors perfectly aligned with modern consumer lifestyles. As noted by industry analysts, the move towards drinking wine in more casual, non-meal occasions—such as at a social gathering or before dinner—favors the lighter, more refreshing profile of most white wines over heavier, tannic reds.²⁵ Furthermore, the wellness trend and a desire for lower-alcohol beverages also push consumers towards whites, which are generally perceived as being and often are lower in alcohol.²⁵ Finally, price plays a role; NIQ data shows that red wines on average cost over \$2 more per 750ml bottle than white wines (\$10.57 vs. \$8.33), making white wines a more accessible option for price-conscious consumers.²⁴ The result is a fundamental reordering of the wine category, with varieties like Sauvignon Blanc and Pinot Grigio showing particular strength.¹⁹

The U.S. retail environment serves as a microcosm of the global pressures facing the wine industry. The volume decline, the polarization of price points, the dramatic shift in color preference, and the influence of a new generation of consumers are all playing out with amplified intensity in this market. For any international producer, success in the U.S. Food Channel now requires a highly specific and adaptive strategy. A generic, mid-priced red wine faces an existential threat, while a crisp, well-marketed white wine at a premium price point or a high-quality, value-driven boxed wine has a much clearer path to success. The U.S. market has become the ultimate litmus test for a wine brand's ability to understand and adapt to the new consumer reality.

2.2 Europe: The Traditional Core Navigates Decline and Adaptation

Europe, the historical heartland of wine production and consumption, is grappling with a profound and accelerating transformation. While it remains the world's largest consuming region, accounting for 48% of the global total in 2024, its mature markets are at the forefront of the structural decline in consumption. Each major country presents a unique case study in how these pressures are reshaping retail landscapes and consumer habits.

France: A Cultural Shift in the Heartland

The long-term erosion of wine consumption in France, a trend decades in the making, continued its steady pace in 2024. Total domestic consumption fell by another 3.6%, reaching 23.0 million hectoliters, the lowest level since 1961.¹⁷ This decline is particularly acute within the Food Channel, the primary point of purchase for French consumers.

Data for supermarket sales reveals the depth of the challenge. For the period from January to November 2024, still wine sales in French retail outlets dropped 4.9% by volume and 3.1% by value compared to the previous year.²⁶ A more detailed analysis from Circana covering the 12 months to August 2024 confirms this trend, showing a 4.3% volume drop for still wine.²⁸

The most seismic shift is occurring within the color categories. In a country culturally synonymous with red wine, its sales in supermarkets have collapsed, plummeting 7.2% by volume. Rosé wines also suffered, with a 3.4% volume drop. In stark contrast, white wines have proven remarkably resilient, with volume sales declining by a mere 0.2% while their sales *value* actually increased by 2.6%.²⁸ This indicates a clear consumer pivot towards white wines, and a willingness to pay more for them, even as they cut back on reds. This is not merely a market fluctuation; it is a fundamental reordering of the French palate, with profound implications for producers in regions like Bordeaux and the Rhône Valley. The decline is universal across appellation tiers, with even prestigious AOP wines seeing a 5.4% drop in retail volume, signaling that heritage alone is no longer a shield against changing consumer tides.²⁸

Germany: A Market Defined by Price and Pragmatism

Germany remains a cornerstone of the European wine market, but its character is distinctly different from that of its neighbors. In 2024, consumption fell by approximately 3%⁶, part of a broader decline attributed to demographic shifts and increased cost-consciousness.²⁹

The German retail landscape is fiercely competitive and dominated by price. Food retailers account for 64% of all wine purchases, and within that, discounters like Aldi and Lidl hold a massive 37% market share.³⁰ This structure makes the German

consumer highly sensitive to price, a fact reflected in the country's low average import price of just €1.85 per liter in the first half of 2024, significantly below the global average.³¹

Consumer preferences in German retail are mirroring global trends. Rosé wine is gaining momentum, with its market share growing by one percentage point to 14% in 2024, largely at the expense of red wine, whose share fell to 39%.³⁰ White wine remains the dominant category with a 47% share, and there is a strong and growing preference for domestic German wines, particularly varieties like Pinot Gris and Pinot Blanc.³⁰ Perhaps the most dramatic trend is the explosive growth in the non-alcoholic wine segment. According to the German Wine Institute (DWI), purchases of non-alcoholic wines surged by an incredible 86% in 2024 compared to 2023.³⁰ While this is from a very small base—the segment still only holds a 1.5% market share—the rapid increase in both the buyer base (+17%) and repurchase rates signals a significant opportunity and a clear direction of consumer interest.³⁰

United Kingdom: Navigating Inflation, Duties, and Shifting Tastes

The UK stands as one of the world's most important and dynamic import markets, valued at approximately £15 billion in 2024.³² However, it is a market under intense pressure from high inflation and a complex new alcohol duty system introduced in 2023, which has increased costs for consumers.³⁴

This price sensitivity is clearly visible in the country's import strategies. While total import volume rose slightly in 2024, recovering from 2023 lows, the total value of these imports fell. This was driven by a significant increase in bulk wine imports, which are then bottled in the UK to save on shipping costs and taxes. Consequently, the average price per liter of imported wine dropped from £3.29 in 2023 to £3.10 in 2024, as importers sought more economical sourcing to mitigate rising costs.³⁵

Within the UK Food Channel, which dominates sales, consumer behavior is polarized. There is a clear trend towards value, but also strong growth in premium segments. Sparkling wine continues its impressive growth trajectory, with sales having increased dramatically since 2018.³² Rosé is another key growth area, with CGA by NIQ data showing that premium rosé sales by value soared by 18.9%, far outpacing premium red or white wines.³⁶ A significant bright spot is the performance of domestic English and Welsh wine. Bucking the global trend of declining consumption, sales of

homegrown wines grew by 10% last year, highlighting a growing consumer interest in local, high-quality products.³²

Italy & Spain: A Tale of Two Resilient, Yet Challenged, Markets

The major southern European producing countries presented a more complex picture in 2024. Italy showed remarkable resilience, with OIV data suggesting that total consumption remained stable, even registering a marginal increase of +0.1%.⁶ However, a closer look reveals shifts beneath the surface. Analysis of channel performance in Italy indicates that sales in the on-premise (Horeca) channel are losing ground, while direct-to-consumer sales are slightly up, suggesting that at-home consumption through retail and direct purchases is propping up the market.³⁷

Spain's performance is subject to conflicting reports, highlighting the challenges of obtaining a single, clear market view. OIV data points to a modest consumption increase of 1.2% in 2024.⁶ However, analysis from Euromonitor suggests that total wine volume sales continued to fall across both on-trade and off-trade channels, with sluggish demand, particularly for the country's vast red wine production, leading to an oversupply situation.³⁸ Given the well-documented climatic challenges and oversupply issues in regions like La Mancha, the more cautious assessment is likely closer to the reality on the ground. For both Italy and Spain, while headline consumption figures may appear stable, the underlying dynamics within the Food Channel are likely strained, reflecting the broader European trends of price sensitivity and shifting color preferences.

Table 2: Top 10 Wine Consuming Countries (Food Channel Focus): Volume, Value & Price Analysis (2024)

This table ranks the top consuming countries and provides core metrics, allowing for a direct comparison of market size and character. It uses OIV total consumption data as a baseline and applies estimated off-trade channel shares to derive Food Channel-specific figures.

Country	Total Consumption	Est. Food Channel	Est. Food Channel	Est. Retail Market Value	Est. Average Retail Price
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	n (mhl) ³	Share (%)	Volume (mhl)	(bn USD)	(USD/l)
USA	33.3	68.5% ²	22.8	\$75.27 ³⁹	\$3.30
France	23.0	73.3% (Table Wine) ⁴⁰	16.9	\$51.29 ⁴⁰	\$3.04
Italy	22.3	75.0% (Est.)	16.7	\$30.00 (Est.)	\$1.80
Germany	17.8	64.0% ³⁰	11.4	\$25.00 (Est.)	\$2.19
UK	12.8	77.0% (Est.)	9.9	~\$19.00 (£15bn) ³²	\$1.92
Spain	9.8	72.2% (Table Wine) ⁴¹	7.1	\$32.49 ⁴¹	\$4.58
Russia	8.6	70.0% (Est.)	6.0	\$15.00 (Est.)	\$2.50
Argentina	7.7	70.0% (Est.)	5.4	\$5.00 (Est.)	\$0.93
Australia	5.4	70.0% (Est.)	3.8	\$8.81 ⁴²	\$2.32
Canada	4.8	70.0% (Est.)	3.4	\$9.71 ⁴²	\$2.86

Notes: Food Channel Share and Retail Market Value are based on a variety of sources and methodologies and should be considered estimates to illustrate market character. Share for France and Spain is based on the dominant table wine segment's off-trade share. Other shares are estimated based on market structure reports. Value for UK converted from GBP. Average Retail Price is calculated from estimated value and volume and is for illustrative purposes.

This comparative table highlights the vast differences in market structure. Spain's high average retail price, for example, seems anomalous and may reflect the specific methodology of the source data, which could be capturing a broader market definition than just retail. In contrast, the low estimated prices in the UK and Italy reflect highly competitive and value-driven retail environments. The U.S. and France show relatively high prices, indicative of strong premium segments within their large retail channels.

2.3 Per Capita Dynamics: The Changing Face of the Wine Consumer

Moving beyond national totals to per capita metrics reveals the true nature of wine consumption culture and the tangible impact of the "less but better" trend. Analyzing how much an average individual drinks—and, more importantly, spends—provides a powerful lens for understanding market maturity, profitability, and future potential.

Per Capita Consumption (Volume)

On a per capita basis, traditional European producing nations continue to lead the world by a significant margin. In 2024, Portugal is estimated to have the highest consumption at an impressive 61.1 liters per inhabitant, followed by Italy (42.7 liters) and France (41.5 liters).⁸ These figures, while still high, represent a long-term decline from their historical peaks.

In stark contrast, the world's largest market by total volume, the United States, has a much more modest per capita consumption rate. Estimates for 2024 place the figure at approximately 9.8 liters per person, calculated from OIV volume data and U.S. census figures.¹⁹ This vast gap illustrates the difference between a market with a deeply embedded, high-frequency wine culture (like Portugal or France) and a market where consumption is less frequent, though spread across a much larger population (the U.S.). While the low U.S. figure suggests significant headroom for growth, the current downward trend indicates that realizing this potential is a formidable challenge. Other key Anglo-Saxon markets like the UK (approx. 18.2 liters) and Australia sit between these two extremes.³⁵

Per Capita Spending (Value)

The analysis becomes particularly insightful when comparing per capita volume with per capita spending. This metric cuts to the core of market value and profitability. While a consumer in France may drink four times the volume of a consumer in the United States, the disparity in spending is significantly smaller, reflecting the higher

average price per bottle in the U.S. market.

By creating an estimated per capita spending metric—derived from total retail market value estimates and population data—we can categorize markets into distinct archetypes. This reveals a crucial distinction for any global wine business: not all consumers are created equal in terms of economic value.

This analysis clearly delineates different market types. Germany, for instance, emerges as a high-volume, low-spend market. Its relatively high per capita consumption is coupled with a low average retail price, a direct result of a retail environment dominated by discounters and a consumer base conditioned to seek value.³⁰ A strategy for Germany's Food Channel must be acutely focused on volume, efficiency, and delivering quality at a sharp price point.

The United States represents the opposite archetype: a lower-volume, higher-spend market. Its modest per capita consumption is offset by a higher average retail price, driven by the strong performance of the premium segment.²³ A successful strategy for the U.S. Food Channel must be brand-led, focusing on quality cues, origin storytelling, and justifying a premium price to the consumer.

The United Kingdom occupies a complex middle ground, exhibiting characteristics of both. It is a market with high price sensitivity and a strong private-label presence, yet it also possesses a highly engaged consumer base that drives robust growth in premium rosé and sparkling wine categories.³⁵

This strategic segmentation based on per capita dynamics is critical. It demonstrates that a one-size-fits-all export strategy is doomed to fail. Resource allocation, portfolio selection, and marketing messages must be tailored to the specific economic behavior of the consumer in each target market's Food Channel.

Table 3: Per Capita Wine Consumption & Spending in Key Markets (Food Channel, 2024)

This table directly compares the per capita metrics to highlight the different consumer behaviors and market structures across the globe.

Country	Per Capita Consumption (Liters)	Population (2024, millions)	Est. Per Capita Spending (USD)
Portugal	61.1 ⁸	10.4 ⁴³	\$150 (Est.)

France	41.5 ⁸	66.5 ⁴³	\$771 ⁴⁰
Italy	42.7 ⁸	59.3 ⁴³	\$506 (Est.)
Switzerland	29.7 ⁸	9.0 ⁴³	\$800 (Est.)
Germany	22.2 ²⁹	84.6 ⁴³	\$295 (Est.)
UK	18.2 ³⁵	69.1 ⁴³	\$275 (Est.)
USA	9.8 ¹⁹	345.4 ⁴³	\$218 ³⁹
Australia	22.0 ⁴⁴	27.0 ⁴³	\$326 ⁴²
Spain	22.0 ⁴⁴	47.9 ⁴³	\$678 ⁴¹
Canada	12.0 (Est.)	39.7 ⁴³	\$244 ⁴²

Notes: Per Capita Consumption figures are from various sources and may reflect total market, not just Food Channel. Population data is from Worldometers 2024 estimates. Per Capita Spending is calculated using estimated retail market value data from sources like Grand View Research and Statista, divided by population, and is for illustrative and comparative purposes. The high figures for France and Spain reflect the total market value methodologies of their respective sources.

The table provides a powerful at-a-glance tool for strategic prioritization. The high per capita spending in markets like France and Spain, despite their challenges, shows the immense value locked within them. Conversely, the lower per capita spending in the UK and Germany, coupled with their large populations, highlights the scale of the value-driven segment. The U.S. figure, while lower than many European counterparts, represents a massive and accessible premium market when multiplied across its vast consumer base.

Section 3: Deconstructing the Wine Category at Retail

To fully comprehend the transformation occurring in the Food Channel, it is necessary to look beyond the aggregated data and deconstruct the "wine" category into its constituent parts. The performance of wine in 2024 was not monolithic; it was a story

of decline in some segments and dynamic growth in others. The shifts in consumer preference regarding color, price, and packaging are redefining the composition of the average supermarket wine aisle.

3.1 The Great Color Shift: White & Rosé Ascendant

The most significant product-level trend in the global wine market is the structural and accelerating shift in consumption away from red wine and towards white and rosé styles. This "Great Color Shift" is no longer an emerging trend but a dominant market force reshaping production and retail strategy worldwide.

OIV analysis has confirmed the long-term nature of this evolution. Global production of white wine definitively surpassed that of red wine in 2013, and the gap has widened since. Over the last two decades, white wine's share of total production has climbed from an average of 46% to 49%, while red wine's share has fallen from 48% to 43%.⁴⁵ This change in production is a direct response to evolving consumer demand.

In the Food Channel, this shift is vividly reflected in sales data from 2024:

- **Red's Retreat:** Still red wine remains the largest single category by global retail value, projected to generate \$183.8 billion in 2024.⁴² However, this aggregate figure masks a rapid erosion of its dominance in key Western markets. In the French retail sector, a traditional bastion of red wine, sales volume plummeted by 7.2% in the year to August 2024, a far steeper decline than any other color.²⁸ This signals a profound change in daily drinking habits.
- **White's Rise:** Still white wine is the clear beneficiary of this shift, with a global retail value forecast to reach \$86.4 billion in 2024.⁴² Its strength is particularly evident in the crucial U.S. market, where it now holds a majority value share of over 52%.² In Germany, the largest European market by volume, white wine commands a 47% share of retail sales.³⁰ The resilience of white wine, especially varieties like Sauvignon Blanc and Pinot Grigio, has been a key stabilizing factor for many producers' portfolios.
- **Rosé's Momentum:** While smaller in total value, rosé wine continues to be a dynamic growth engine. Global retail sales were projected to reach \$23.3 billion in 2024.⁴² It is a significant driver of category growth in markets like the UK and Germany. In the latter, rosé's market share climbed to 14% in 2024, gaining ground directly from red wine.³⁰ In the UK on-trade, a reliable indicator of retail

trends, sales of premium rosé have soared, vastly outperforming their red and white counterparts.³⁶

The drivers of this global color shift are rooted in fundamental changes to consumer lifestyles. As identified by industry analysts, there is a clear move towards consuming wine in more casual, social, and non-food-centric occasions.²⁵ The lighter, fresher, and more approachable profiles of most white and rosé wines are better suited to this type of consumption than are complex, tannic red wines. This trend is further reinforced by the wellness movement, as consumers seeking lower-alcohol options naturally gravitate towards whites and rosés, which are typically and perceptually lower in alcohol.²⁵ Finally, the relative affordability of white and rosé wines compared to many reds provides a compelling value proposition for price-sensitive consumers in an inflationary environment.²⁵

Table 4: Retail Market Share by Wine Color in Key Markets (2024, % Value)

This table visualizes the color shift by comparing the value share of red, white, and rosé still wines across major retail markets.

Country	Red Wine (%)	White Wine (%)	Rosé Wine (%)	Source
Global (Still)	62.6%	29.5%	7.9%	42
USA	~40% (Est.)	52.2%	~7.8% (Est.)	2
France	Declining Sharply	Resilient/Growing	Declining	28
Germany	39.0%	47.0%	14.0%	30
UK	Declining	Resilient	Growing (Premium)	36

Notes: Figures are based on value share where available. Global figures are calculated from Market.us revenue projections for still wine. USA figure for white wine is from Market.us; red and rosé are estimates based on trend analysis. France and UK trends are qualitative based on available 2024 reports. German figures are from the German Wine Institute.

This table provides a stark, comparative visualization of the trend. It clearly shows the U.S. and Germany as markets where white wine is either dominant or co-dominant,

leading the shift away from red. This data is immensely valuable for portfolio management, allowing a producer to see where their red-heavy or white-heavy portfolio has the best chance of success or faces the biggest headwinds in the retail channel.

3.2 The Premiumization Paradox: The Hollowing-Out of the Mid-Market

Running parallel to the color shift is an equally powerful trend reshaping the economic structure of the wine category: the premiumization paradox. This describes the polarization of consumer spending towards the highest and lowest price points, creating a precarious and shrinking middle ground.

The "less but better" dynamic remains a potent force, particularly in mature markets. This is the trend whereby consumers may be drinking wine less frequently, but when they do, they choose to spend more per bottle for a higher quality or more engaging experience.¹⁵ This behavior is a primary reason why the global market's value has remained resilient despite falling volumes. The world of fine wine provides a clear, if extreme, example: while accounting for just 1.5% of the total wine market by volume, it commands an impressive 11% of its total value, underscoring the immense price leverage of premium products.⁴⁷

However, this is only half of the story. The same inflationary pressures that encourage some to seek affordable luxuries also force others to trade down, seeking out value-oriented options, private labels, and promotions to manage their household budgets.¹⁴ The result of these two opposing forces is a bifurcation of the retail wine shelf.

Retail scan data from the U.S. market provides the clearest evidence of this phenomenon in 2024:

- **The Premium Tiers Thrive:** Wineries with an average bottle price above \$20 have consistently outperformed their lower-priced competitors. The sales growth for wines priced between \$20 and \$50 was double that of wines priced under \$20.²³ NIQ data confirms that the \$20-\$24.99 price tier was one of the few segments to show positive growth in a declining market.²⁴
- **The Value Tiers Suffer (but persist):** The lower-end of the market has seen the steepest volume declines. The sub-\$11 price tiers have been hit hard, with segments like the \$8-\$10.99 bracket experiencing double-digit sales drops.²¹

However, this segment still represents a huge portion of total volume and remains a key focus for price-driven consumers and large-scale producers.

The critical consequence of this trend is the "death of the middle." The segment between roughly \$12 and \$19 per bottle is being squeezed from both sides. It lacks the clear value proposition to attract the cost-conscious shopper, who will trade down to a sub-\$11 wine or a private label. Simultaneously, it lacks the quality cues, regional prestige, or compelling brand story to attract the consumer looking to trade up for a premium experience. Brands positioned in this precarious middle ground are most at risk of losing consumer relevance and, consequently, their valuable shelf space as retailers seek to optimize their category performance by focusing on the growing poles of the market. This represents a critical strategic challenge for a large number of wine producers whose business models have been built on servicing this now-eroding mid-market.

3.3 Quality, Packaging, and Format: Differentiating on a Crowded Shelf

In a market characterized by intense competition and shifting consumer values, product differentiation extends beyond price and color to the very format and presentation of the wine itself. In 2024, quality cues, packaging innovation, and sustainability have become crucial tools for capturing consumer attention in the crowded Food Channel.

While the traditional 750ml glass bottle remains the overwhelmingly dominant format, accounting for over 93% of the U.S. market by packaging type, alternative formats are carving out important and high-growth niches.²

- **Bag-in-Box (BiB) Goes Premium:** Historically associated with value wine, the BiB format is undergoing a premium revolution. While global trade data for the overall BiB category showed weakness in 2024 ⁶, this masks a key trend within domestic retail markets: the strong growth of *premium* boxed wine.²⁴ Consumers are embracing the convenience and value-per-glass of the 3-liter format, and are now willing to purchase higher-quality wine in this packaging. This presents a significant opportunity for brands to offer premium varietals and appellations in a format that aligns with at-home consumption habits.
- **Canned Wine and Convenience:** The canned wine market continues its upward

trajectory, with sales expanding by an estimated 15% in 2024.⁴⁸ This growth is fueled by the format's inherent convenience, portability, and single-serve nature, which appeals strongly to younger consumers and suits on-the-go occasions like picnics, concerts, and beach trips. It allows for trial without the commitment of a full bottle and breaks down the formality sometimes associated with wine.¹

- **Sustainability as a Selling Point:** Perhaps the most significant trend in packaging is the growing consumer and industry focus on sustainability. This is no longer a niche concern but a mainstream expectation that influences purchasing decisions. Two-thirds of regular wine drinkers in major markets describe sustainability as an important factor, a figure that rises to 70% in the U.S. and an overwhelming 94% in China.¹⁵ In response, brands—including those in the premium tier—are increasingly adopting more eco-friendly packaging solutions. This includes lightweight glass bottles to reduce shipping weight and carbon footprint, bottles made from recycled PET, and innovative paper-based bottles.¹⁵ For a brand in the Food Channel, sustainable packaging serves as a tangible and visible signal of its values, communicating directly with the eco-conscious consumer at the critical moment of decision at the shelf.

Section 4: Strategic Outlook and Recommendations for 2025 and Beyond

The analysis of the 2024 global wine market reveals an industry at a pivotal crossroads. The convergence of structural demand shifts, climatic volatility, and economic pressures has created a new, challenging landscape. Navigating this environment requires a clear-eyed assessment of the headwinds, a sharp focus on the pockets of opportunity, and a willingness to make bold strategic adjustments. This final section translates the preceding analysis into a forward-looking outlook and actionable recommendations for producers, distributors, and retailers focused on the critical Food Channel.

4.1 Navigating the Headwinds: Key Challenges for the Food Channel

The challenges facing the wine industry are not cyclical or temporary; they are

deep-seated and structural. Stakeholders must plan for a future where these headwinds are the new normal.

- **Structural Demand Decline:** The core, unavoidable challenge is that in many of the world's most important and mature markets, the underlying consumer demand for wine is shrinking.¹² The multi-decade low in global consumption is the result of long-term forces, not a short-term dip. Strategies built on the assumption of a return to previous consumption levels are likely to fail. The market has fundamentally resized, and businesses must adapt their scale and expectations accordingly.
- **The Generational Recruitment Crisis:** The wine industry is struggling to recruit younger legal-drinking-age consumers—Millennials and Gen Z—at the same rate as it did previous generations like the Baby Boomers. This is not a matter of taste, but of context. These younger cohorts have a vastly more diverse and experimental beverage repertoire, spreading their consumption across wine, craft beer, spirits, RTDs, and non-alcoholic options.¹⁵ Their loyalty is to novelty and experience, not necessarily to a specific brand or origin. Winning their share of consumption requires a different approach, one focused on engagement, convenience, and alignment with their values, rather than relying on traditional notions of heritage and appellation.
- **Climate and Supply Volatility:** Climate change has transitioned from a future threat to a present and disruptive reality. The extreme weather events that led to historically low harvests in 2023 and 2024 are becoming more frequent and severe.³ This creates immense volatility in supply, making long-term production planning, cost management, and pricing strategy exceptionally difficult. The fragile, scarcity-driven price equilibrium of 2024 could be shattered by a single bumper harvest, exposing producers to sudden and severe price pressure. This uncertainty is now a permanent feature of the business environment.

4.2 Identifying the Green Shoots: Pockets of Opportunity

Despite the formidable challenges, the 2024 market data also illuminates clear pockets of growth and opportunity. Success will come from strategically pivoting resources and focus towards these "green shoots."

- **The White & Rosé Revolution:** The most significant product-level opportunity is the clear and sustained consumer shift towards white and rosé wines. This is not a fleeting trend but a fundamental rebalancing of the market driven by modern

lifestyles. Producers who can adapt their viticultural focus, winemaking styles, and marketing to cater to the demand for fresh, crisp, and versatile white and rosé wines will be best positioned to capture the modern consumer. This represents a massive opportunity for regions and producers not traditionally known for red wine to gain market share.²⁵

- **Premiumization and Niche Value:** The resilience of the premium-and-above price tiers proves that a significant segment of consumers is willing to pay for quality, authenticity, and a compelling story.²³ While the middle market is collapsing, the top end remains robust. This creates a significant opportunity for smaller, quality-focused producers who can communicate their unique terroir, sustainable practices, or artisanal methods. In the impersonal environment of a supermarket, a strong brand story told through labeling and marketing can justify a premium price and create a loyal following.
- **The Low/No-Alcohol Frontier:** While still a nascent category, the explosive growth of non-alcoholic wine in sophisticated markets like Germany (+86% in 2024) signals a massive future opportunity.³⁰ Historically, the category has been held back by quality concerns. The producer who can crack the code and deliver a genuinely satisfying, high-quality non-alcoholic wine will tap into the powerful and growing wellness and moderation movements, capturing a consumer segment that the traditional wine industry is currently losing.
- **Emerging Markets as a Long-Term Hedge:** While this report focuses on consumption in established retail channels, the long-term strategic health of the industry may depend on geographic diversification. The growth potential in developing markets like India, Brazil, and Mexico, driven by rising middle classes and urbanization, offers a crucial hedge against the structural decline in mature Western markets.¹ Building a presence in these markets, while challenging, is a vital long-term strategy.

4.3 Strategic Recommendations for Stakeholders

The current market demands decisive action. The following recommendations are tailored for key stakeholders operating within the Food Channel.

For Producers/Winemakers:

1. **Conduct a Radical Portfolio Review:** The time for incremental change is over. Critically assess the balance of your portfolio in the context of the Great Color Shift. If you are heavily weighted towards traditional, full-bodied red wines, you must develop a long-term strategy to pivot. This may involve grafting vineyards, acquiring new sites, or developing new brands focused on white, rosé, and lighter-style red wines.
2. **Escape the Squeezed Middle:** You must make a conscious choice to compete on either value or premium. The middle ground is disappearing from the retail shelf. If you target the premium segment, your investment must be in tangible quality, authentic storytelling, and packaging that communicates a premium position. If you target value, your focus must be on achieving economies of scale, operational efficiency, and delivering a consistent product that can compete with private labels.
3. **Innovate with Purpose:** Treat innovation not as a side project but as a core business function. This means seriously investing in the development of high-quality low- and no-alcohol wines. It means embracing alternative packaging like premium BiB and cans for specific consumer occasions. And it means integrating sustainable practices into every step of your production, from the vineyard to the bottle, and communicating this commitment clearly to the consumer.

For Distributors/Importers:

1. **Curate for the New Consumer:** Your portfolio is your most important strategic asset, and it must reflect the new market reality. Actively seek out and champion producers who are aligned with modern trends. This means prioritizing crisp, modern white wines; high-quality, pale rosés from diverse regions; and authentic, story-driven premium brands. Reduce your exposure to generic, mid-priced red wines that are losing relevance.
2. **Become a Partner in Value Creation:** The growth of private labels and premium own-brands is a major feature of the modern Food Channel. Instead of viewing this as a threat, become an indispensable partner to retailers. Use your sourcing expertise to help them develop high-quality, exclusive-label programs and premium BiB offerings that deliver exceptional value to the consumer and strong margins to the retailer.

For Retailers (Supermarkets, Hypermarkets, Specialty Stores):

1. **Re-allocate Shelf Space Strategically:** Your shelf allocation should be a direct reflection of market trends. This means reducing space for the declining mid-priced red wine segment and expanding the facings for growing categories. Increase the footprint for white wines, create a distinct and appealing rosé section, build a "premium value" zone for high-quality wines under \$15, and expand the premium and ultra-premium offerings.
2. **Invest in In-Store Communication and Education:** In a self-service environment, the shelf is your salesperson. Use enhanced signage, shelf-talkers, and QR codes to tell the stories behind your premium, artisanal, and sustainable wines. Help the consumer understand *why* a wine is worth \$25, not just that it costs \$25. This encourages trade-up and builds category value.
3. **Treat Non-Alcoholic as a High-Growth Category:** The non-alcoholic beverage section is no longer a niche corner for a few token products. It is a destination for a growing and valuable consumer segment. Build a credible and diverse non-alcoholic wine set, featuring a range of styles and quality tiers. Merchandise it thoughtfully, potentially alongside traditional wines, to capture the moderating consumer who may be purchasing both types of products in the same shopping trip.

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