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Global travel-retail wine sales rose 5% in value in 2025

IWSR said volumes grew 2%, leaving wine among the few alcohol categories still expanding in international transit shops

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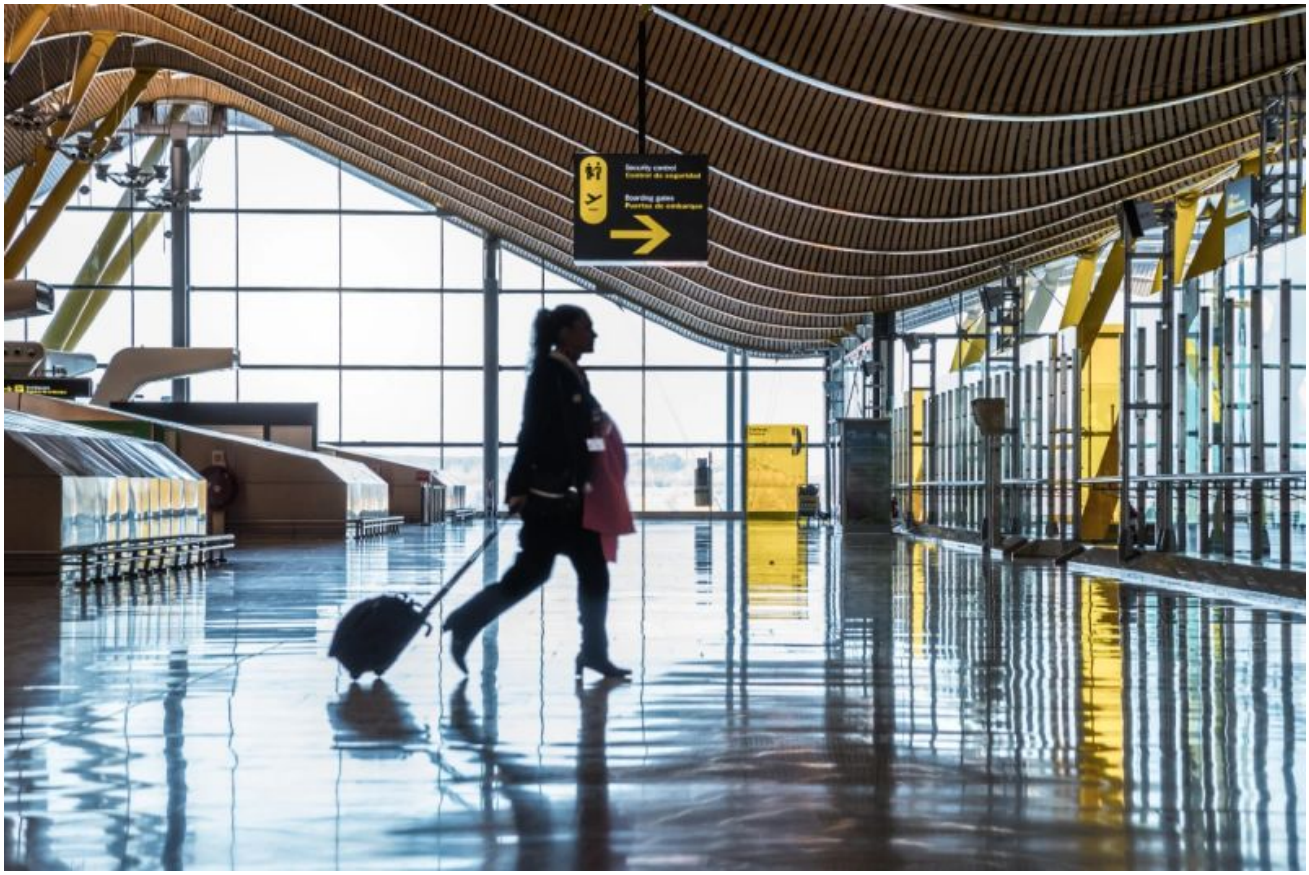

Global wine sales in duty-free shops and other stores serving international travelers increased in 2025, with revenue rising faster than the number of units sold, according to an IWSR analysis published on September 16. The research said wine in global travel retail grew 5% in value and 2% in volume from 2024 to 2025.

The gap between those two measures suggests that the channel generated more revenue per unit of wine sold even without a sharp increase in physical sales. Based on the rounded growth rates published by IWSR, the average value per unit of volume rose by about 2.9%. The available data do not show how much of that change came from higher prices, a shift toward more expensive products, currency effects or other factors.

The figures stand out because much of the broader global alcohol market remained weak in 2025. In its review of travel retail, IWSR described the channel as one of the few areas where alcohol sales continued to expand while many domestic markets slowed. Travel retail includes duty-free stores and other outlets aimed at international travelers, mainly in airports but also in border shops, ferries and other transit locations.

Within that channel, wine did not grow as fast as spirits, but it still posted gains on both value and volume. IWSR said combined wine and spirits volumes in global travel retail rose 5% in 2025. Spirits volumes increased 6% and value rose 7%, outperforming wine on unit growth but not by a wide margin on revenue growth.

The wine category was supported mainly by still wine, which IWSR identified as the main driver of the overall increase. The analysis also pointed to a shift in drinking occasions and product choice. Light aperitifs rose 16% in volume and 25% in value, suggesting stronger demand for lower-intensity, more casual products in a retail setting built around impulse purchases, gifting and premium treats during travel.

Not every part of the wine market moved in the same direction. Champagne posted lower volumes but higher value, a pattern that often points to a richer sales mix or higher prices even when fewer bottles are sold. Prosecco moved the other way, with declines in both volume and value in travel retail. IWSR described that trend as a sign of possible “Prosecco fatigue” in a market where consumers are exposed to many competing categories and often make quick buying decisions.

That matters for Italian producers because Prosecco has been one of Italy’s most visible wine exports and a regular feature in airport retail. A weaker showing in travel retail does not necessarily mean weaker demand worldwide. The same Wine Meridian report cited separate IWSR data showing that Italian sparkling wine in the United States grew at a 5% compound annual rate from 2018 to 2023, with projected annual growth of 4%

from 2023 to 2028. But the travel retail numbers suggest that strong recognition alone may no longer be enough to keep sales rising in a channel where novelty, premium positioning and quick brand communication carry unusual weight.

Regional performance in travel retail also varied widely. IWSR said all four major regions it tracks posted value growth in 2025, but at different speeds. Europe and Africa-Middle East each rose 11%, the Americas increased 7%, and Asia-Pacific advanced 2%. Those figures refer to travel retail overall rather than wine alone, but they show that the channel was not moving as a single market.

Some of the strongest gains in the channel came from spirits categories that combine premium pricing with a clear story of origin and identity. Japanese whisky rose 44% in value and 37% in volume, according to the same IWSR review. Scotch and American whiskey each increased 10% in value, and Irish whiskey rose 11%. That broader backdrop matters for wine because travelers in duty-free stores are choosing across categories, not only between different wine labels.

For wine producers, including those in Italy, the 2025 data point to a market that is growing but becoming more selective. Value rising faster than volume means the channel is still capable of supporting more expensive purchases, but the split between categories shows that not every familiar product benefits equally. Still wine advanced, light aperitifs surged, Champagne held value despite weaker volume, and Prosecco lost ground on both measures.

The numbers also suggest that travel retail may reward products that can justify a premium quickly. Airport and border-store shoppers often have limited time and little room for comparison. In that setting, clear positioning, recognizable quality cues and a sense of distinction can matter more than they do in a supermarket aisle. The IWSR material cited by Wine Meridian argued that travel retail is increasingly an environment shaped by experience and discovery, not just convenience.

At the same time, the published data leave several important questions unanswered. IWSR did not attach an overall dollar figure or absolute volume for wine sales in global travel retail in the material cited, so the gains cannot be translated from open sources into additional revenue or liters sold. The analysis also did not break down how much of

the 5% rise in value came from higher shelf prices, changes in product mix, exchange-rate movements or shifts in passenger traffic across airports and regions.