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Global still wine consumption fell 4% across major markets in the first half of the year

IWSR said Prosecco rose 3% after steep declines in the United States and China widened the category divide

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Global still wine consumption fell 4% in the first half of the year across 21 major markets tracked by IWSR, while Prosecco rose 3%, underscoring a widening split inside the wine business as consumer demand shifts by category and country.

The figures, published by IWSR on Tuesday, November 10, cover markets that account for 76% of worldwide alcoholic beverage consumption. Across all alcoholic drinks, total volumes in those markets declined 1% from the same period in 2025. But that overall result was heavily influenced by the United States and China. Excluding those two countries, total alcoholic beverage consumption in the group increased 1%.

The sharpest pressure on still wine came from the two biggest trouble spots. In the United States, total alcoholic beverage consumption dropped 4% from January through June, according to IWSR. Still wine fell 6%, while beer and ready-to-drink products each declined 4%. In China, the overall alcoholic drinks market was down 3%, and still wine fell 9%. Domestic spirits in China dropped 12%.

IWSR said the slowdown reflects both economic pressure and changing consumer behavior. In the United States, the market has been weighed down by economic uncertainty, inflationary pressure and the effect of tariffs on household purchasing power. In China, weaker growth, problems in the property sector and an aging population have hurt demand. The research group also pointed to a broader move toward moderation in alcohol consumption, a trend that is affecting several categories across multiple markets.

That moderation did not hit every segment in the same way. Prosecco was one of the clearest areas of growth, with consumption up 3% in the markets surveyed. IWSR also reported an 8% rise in nonalcoholic beer and a 4% increase in Indian whisky. The contrast suggests that products tied to different drinking occasions, or to lower-alcohol and alternative formats, are holding up better than traditional still wine in many places.

The Prosecco increase also shows that category growth and trade performance do not always move together. While IWSR recorded stronger consumption for Prosecco, Italian statistics agency Istat reported a 0.3% decline in Prosecco DOP export volumes in the first half of the year. That gap points to a more complex market, where gains in retail or on-premise demand may not translate evenly into export shipments.

Outside the United States and China, the picture was more mixed and in some cases stronger. India posted a 10% increase in total alcoholic beverage volumes in the first six months of the year. That growth was led by traditional beer, up 16%, ready-to-drink

beverages, up 12%, and Indian whisky, up 4%. Colombia rose 9%, South Africa increased 5%, and Brazil was up 3%, helped mainly by beer and ready-to-drink products. The United Kingdom recorded 2% growth, supported by traditional beer, no-alcohol alternatives and ready-to-drink beverages.

South Africa stood out as one of the few places where still wine also showed growth, rising 3%. That was not the case in every fast-growing market. IWSR's data indicate that gains in countries such as India, Brazil and Colombia reflect expansion in total alcoholic beverages, not necessarily stronger wine demand. For wine producers and distributors, that distinction matters. A market can show solid headline growth while offering limited near-term support for still wine sales.

The first-half results also suggest that the global alcoholic drinks market is improving compared with 2025, even if it remains in contraction. In the first half of 2025, total alcoholic beverage consumption across the markets tracked by IWSR had fallen 2% from the same period in 2024. This year's 1% decline marks a slower rate of contraction. Seven markets posted volume growth: Brazil, Mexico, India, the United Kingdom, South Africa, Colombia and Thailand. In six others, including Italy, France and Germany, declines were less severe than a year earlier. Conditions worsened, however, in China, Russia, Canada, the Philippines and the Netherlands.

For the broader beverage industry, the divergence between markets and product types could influence where companies place investment, marketing and export resources. Growth is no longer spread evenly across alcohol categories, and the strongest opportunities may depend less on overall market size than on whether consumers are moving toward sparkling wine, nonalcoholic products, ready-to-drink beverages or local spirits.

The still wine downturn is especially important for exporters because the United States remains one of the most important destinations for many wine producers, while China continues to be a difficult but closely watched market in Asia. At the same time, the stronger performance of Prosecco, nonalcoholic beer and some local spirits suggests that consumption occasions are changing, with drinkers more willing to switch formats or reduce intake rather than keep buying the same products in the same volumes.

IWSR’s first-half data show a global market that is still under pressure but less uniformly weak than it was a year ago. Demand for high-volume categories such as traditional beer and still wine remains soft in several major countries, while narrower segments are still expanding. For producers across wine, beer and spirits, that uneven pattern is likely to make country-by-country and category-by-category sales planning more important over the rest of the year.