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German wine lifts its household market share to 43.5% in the third quarter

Spending on domestic bottles held steady after a 1.8% price rise, leaving imported wine sales down 9.7% by volume

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German wine held up better than imported labels in household purchases during the third quarter, even as the country’s overall wine market continued to shrink.

In a report released Wednesday, November 11, the German Wine Institute said spending on German wine in the home market was broadly stable from a year earlier, while imported wine posted sharp declines in both volume and value. The institute cited a study it commissioned from NielsenIQ and a related statistical bulletin covering purchases by German households.

Total household wine purchases in Germany fell 6.3% by volume in the third quarter compared with the same period in 2025. Consumer spending on wine dropped 4.8% over the same period. Within that weaker market, German wine sales volumes fell 1.7%, but spending on German wine edged up 0.1%. Imported wine performed much worse, with purchased volumes down 9.7% and spending down 9.0%.

The figures show domestic producers gaining share in a contracting market rather than the market returning to growth. The German share of household wine purchases by volume rose to 43.5% from 41.3% a year earlier, an increase of 2.2 percentage points.

The third-quarter data also marked a slower rate of decline than in the previous quarter. According to the institute, the year-over-year drop in total wine volume moderated from 7.7% in the second quarter to 6.3% in the third quarter. That change means the market was still shrinking, but not as fast as before.

The German Wine Institute said the relative stability in domestic wine revenue was linked to a 1.8% increase in the average price of German wine. That rise helped offset the lower volume sold. The group said gains were recorded in both the lower price segment, from 1.49 euros to 1.99 euros per 0.75-liter bottle, and in the segment above 5 euros per 0.75 liter.

The report did not provide absolute market totals in liters or euros in the material published on November 11, and it did not offer a directly comparable year-to-date total. The institute presented the third-quarter changes as a sign that German wine was proving more resilient than foreign wine in a difficult retail environment, but it stopped short of calling it a lasting turnaround.

The retail pattern also showed where consumers were buying. The institute said discount chains and smaller food retail outlets were among the stronger performers for wine purchasing during the period. That suggests the pressure on the market is continuing to favor channels where shoppers tend to be more price-conscious.

Product preferences within German wine also shifted. The institute said domestic white wine continued to gain ground, with its market share rising to 54% from 51% in the same period a year earlier. It said that trend pointed to continued consumer movement toward white and rosé wines through the third quarter.

The data underline the pressure facing foreign suppliers in Germany’s retail wine market. Imported wines lost nearly one-tenth of their household sales volume in a year, far more than the drop for German wines and more than the decline for the market as a whole. In value terms, the gap was almost as wide, with imported wine down 9.0% against the 0.1% increase for domestic wine.

At the same time, the report carries important limits. The NielsenIQ figures are based on a household panel, so they exclude consumption in restaurants, bars and other out-of-home settings. The spending data are also nominal, meaning they reflect not only price changes but also shifts in what consumers bought. A higher average price for German wine, for example, does not necessarily mean producers imposed a uniform increase across all products.

The German Wine Institute said more quarters will be needed to determine whether the latest figures mark a sustained shift or only a temporary bright spot in a difficult market. For now, the third-quarter results show a smaller decline for German wine, a stable revenue line for domestic producers, and a much steeper setback for imported bottles on German household shelves.