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Polish Wine Market Sipping on Growth

The Emerging Wine Market in Poland, a 26% Increase in Imports Since 2018

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ENOEXPO International Wine Fair in Krakow, Poland

Over the past few years, Poland's wine market has undergone significant transformation. Between 2018 and 2022, the value of grape wine sales surged by 28%, according to data from Polish customs authorities. This uptick reflects a clear shift in Polish consumer preferences towards more sophisticated wine products. However, rising inflation has tempered this growth, as many consumers have cut back on alcohol consumption in response to higher prices. While total sales volumes saw a slight decline in 2022, the market's overall value continued to increase, largely driven by the rising cost of wine products.

Poland is not a country traditionally associated with wine production. The local viticulture industry remains small, with limited output from regions like Zielona Góra, which has historical ties to winemaking. Efforts are being made to revive these vineyards, but domestic production is still far from meeting the country's growing demand. Polish wines are seen more as curiosities rather than staples, with the market heavily reliant on imports to satisfy its thirst for wine.

From 2018 to 2022, the value of wine imports into Poland increased by 26%. Italy, France, and Germany dominate the supply chain, followed by other European countries such as Spain and Portugal, as well as non-European producers like Chile and the United States. As Polish wine consumption continues to rise, these international suppliers have gained a firmer foothold in the market.

Historically, Poland's wine consumption leaned heavily towards fruit-based wines, a tradition rooted in the country's agricultural abundance. However, in recent years, grape wines have begun to overshadow this preference, particularly among younger and more urban consumers. By 2022, still wines made from grapes accounted for nearly 50% of total wine sales in Poland, while fruit wines had diminished to 31%. This is a remarkable change in consumer behavior, signaling a preference for more refined wine options.

Another significant development has been the rise in demand for sparkling wines, with Italian prosecco leading the charge. Prosecco, in particular, has captured the attention of Polish consumers, becoming a popular choice not just for celebratory events but also for casual, everyday drinking. This trend has expanded the market for sparkling wines

and indicates a shift towards a more versatile and broader appreciation of wine.

The Role of Supermarkets and the Premiumization Trend

Supermarkets and discount chains remain the primary distribution channels for wine in Poland. In 2022, the two largest retail chains, Biedronka and Lidl, together controlled over 40% of the wine market. These stores offer a wide range of wines, appealing to price-sensitive consumers while also catering to those looking for quality at affordable prices.

Nevertheless, the premium segment of the market is gaining momentum. An increasing number of Polish consumers, particularly those with higher disposable incomes, are seeking out wines of superior quality and greater variety. Specialized wine stores, which offer curated selections of high-end wines, are slowly but surely carving out their space in the market, signaling a growing appetite for premium products.

This trend towards premiumization is driven by several factors. Rising incomes have given more Poles the ability to explore a wider array of wine options, while the desire to experience and understand different grape varieties, regions, and production methods is also playing a key role. Polish wine drinkers are becoming more discerning, and this shift is being propelled by younger generations. Millennials and Generation Z are increasingly opting for wine as their beverage of choice at social gatherings and informal events.

The Rise of Non-Alcoholic and Organic Wines

As in many other markets, Poland is also experiencing a shift towards more health-conscious and environmentally friendly consumption habits. Non-alcoholic wines and organic wines have started to gain traction, reflecting a global trend towards more responsible drinking. While still a relatively small portion of the market, these categories are growing rapidly, particularly in the sparkling wine sector, where non-alcoholic options have seen significant demand increases.

Despite current economic challenges, the Polish wine market is expected to continue expanding in the coming years. Projections suggest that the value of grape wine sales could grow by 40% between 2023 and 2027. This growth will likely be driven by continued interest in sparkling wines, particularly prosecco, as well as the broader premiumization of the market.

For international producers, Poland represents an attractive and evolving market. As consumers increasingly gravitate towards more refined and higher-quality products, opportunities abound for foreign wine exporters looking to establish or deepen their presence in Poland. The growth of specialized wine shops, coupled with a rising curiosity among Polish drinkers about wine regions, grape varieties, and winemaking techniques, suggests that Poland is becoming an important market for wines from across the globe.

Poland's Wine Market in Transition

While Poland may not yet have the deep-rooted winemaking traditions of its European neighbors, it is quickly emerging as a market with a burgeoning appreciation for wine. The shift from fruit-based wines to grape wines, the growing popularity of sparkling varieties, and the premiumization of the market all point to a country in the midst of a wine renaissance.

With consumer interest in higher-quality products on the rise, and demand for premium wines continuing to grow, Poland is becoming a key destination for wine exporters worldwide. The next few years will be crucial as international producers seek to capitalize on the evolving tastes of Polish consumers, who are increasingly looking for wines that offer not just flavor, but also a story and a sense of discovery.