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Italian Wine Sales Show Modest Growth as Consumers Shift Toward Quality and Premium Experiences

Southern regions lead value gains while younger families and women drive new trends in consumption and premiumization across Italy and abroad

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In August 2025, sales of wine bottles in Italy’s large-scale retail sector reached 3.1 billion euros, showing a slight increase in value of 0.6% but a decrease in volume by 1.8% compared to the previous year. The southern regions of Italy stood out as the most dynamic, with a 5.3% rise in value and nearly stable volumes. These figures come from a NielsenIQ study presented during the Milano Wine Week, held from October 4 to 12, during the Carrefour Day event. The research analyzed both global and national trends in the wine sector, covering retail, on-premise, and off-premise channels.

The study found that 21.8 million Italian households, representing 84.6% of the population, purchase wine and sparkling wine in supermarkets and hypermarkets. On average, this equates to nearly two bottles per month per household, with an estimated annual expenditure of 137 euros. According to Lorenzo Cafissi, Head of Beverage and Home & Personal Care at Carrefour Italia, wine today is not just about consumption but also about culture and responsibility. He emphasized the importance of making quality wine accessible and telling the stories behind the bottles.

The research highlighted that the largest group of wine buyers are households led by individuals aged 55 and over, without dependent children and with above-average income, making up 29.7% of the total. However, younger families with children and below-average income, while representing a smaller share (21.8%), are growing fastest in both numbers and consumption. This group also shows a stronger tendency to purchase premium products.

Sparkling wines are among the most frequently purchased categories in supermarkets, with sales reaching 784 million euros. This segment saw growth both in value (+1%) and volume (+2.2%). In contrast, still wines generated 2.3 billion euros in sales, but volumes declined, especially for wines with protected designation of origin (DOP), which fell by 3.4% in volume but remained stable in value. Wines with protected geographical indication (IGP) also saw a drop in volume (-1.7%) but a slight increase in value (+1.2%).

Consumption outside the home remains a key driver for wine, supported by an ecosystem of 438,000 active establishments, including 176,000 restaurants and 150,000 bars, as well as over 100,000 hotels and other accommodations. In the past

three months, nine out of ten Italians visited a bar, restaurant, or similar venue at least once, a higher rate than in other major European markets like Germany and Spain. However, the survey found signs of slowdown compared to 2024, with six out of ten consumers feeling vulnerable to rising prices. Spending on eating and drinking out is among the first areas to be reduced, a trend also noted at the recent Food & Beverage Market General Assembly.

Looking ahead to 2026, 19% of Italians surveyed said they plan to reduce their frequency of dining out due to higher living costs, while 13% expect to go out more often. Despite this, wine remains a key category, preferred by two out of five Italians when they do go out. When outings become less frequent, consumers tend to focus on quality, with 66% of respondents saying they would choose a higher-value experience for the same price.

NielsenIQ’s analysis shows that wine appeals to all age groups, but women aged 35 to 54 have a higher incidence of consumption. Generation X (44-55 years old) currently has the greatest purchasing power and affinity for wine, while Generation Z (18-27 years old) is more active in social settings but prefers cocktails and beer over wine. Healthier choices are also gaining ground, with no- and low-alcohol wine categories showing signs of expansion, though they remain a niche.

Eleonora Formisano, Sales Lead at NielsenIQ, noted that wine must appeal to different audiences by offering premium experiences for mature consumers and new, more immediate formats for younger generations. Federico Gordini, president of Milano Wine Week, pointed out that young families, especially those led by millennials, are now the fastest-growing segment in terms of both numbers and consumption. These consumers are more focused on quality and differentiation, driving trends such as wine tourism, winery visits, and participation in wine-related events.

On the international stage, NielsenIQ reported that the global beverage market reached a value of $940 billion in the year ending March 2025, up 4% from the previous year. Italy remains the leading foreign wine supplier in the United States and is the top player in the sparkling wine segment, holding over 40% of the market share. Italian wine sales in U.S. retail remain stable in both price and volume, despite ongoing uncertainty over

tariffs.

Globally, the wine sector is undergoing structural changes, with growth now driven more by value than by volume. For Italy, opportunities lie in combining its strong heritage with targeted strategies for positioning, digital development, and expansion into emerging markets such as Latin America and China. South America, particularly Brazil, offers significant potential, with the region’s retail wine market valued at $2.3 billion and Brazil accounting for 44% of both volume and value. Mexico and Argentina are also important markets, with Mexico having the highest average wine price in the area and Argentina showing strong value growth driven by price increases.

China is emerging as one of the most dynamic markets, especially in social and digital commerce channels. The country has over 7 million consumption points, and 87% of Chinese consumers visit restaurants or similar venues weekly, far above the global average.

Globally, still wines account for nearly three-quarters of total wine value (74.8%) but have declined by 1.4%. Sparkling wines make up 14.4% and remain stable, while Champagne and specialty wines have seen slight decreases. In contrast, no- and low-alcohol wine categories are growing rapidly, with sparkling versions up 17.1% and still versions up 5.9%.