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Italian Retail Wine Sales Drop 2.4% in Third Quarter as Market Fatigue Sets In

E-commerce emerges as the only growth channel while price sensitivity and promotions shape consumer choices across Italy

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The Italian wine market is showing signs of fatigue after a brief recovery in the spring. This trend was highlighted in the latest release from the Wine Monitor Observatory, promoted by Nomisma. The analysis, based on NIQ data, examined sales trends for wine in Italy’s off-trade channel, focusing on values, volumes, and average prices. The data is organized by distribution format, wine type, and quarter.

During the summer months, retail wine sales did not experience the expected boost. Demand remained cautious and price growth has now stabilized. In the third quarter of 2025, sales volumes dropped more sharply, with a decrease of 2.4 percent compared to the previous period. Even sales values failed to return to positive territory, recording a slight decline of 0.2 percent.

Among distribution channels, the discount sector saw its growth come to a halt, with both value and volume declining. In contrast, e-commerce performed well, accelerating compared to previous quarters. Hypermarkets and supermarkets continued to show resilience in maintaining sales values.

The third quarter also saw a more stable balance between different wine categories. Growth in sparkling wines slowed down compared to earlier in the year. Still and semi-sparkling wines continued to decline, with values down by 0.2 percent and volumes falling by 3.3 percent. However, average prices for these wines increased by 3.2 percent.

Sparkling wines managed to maintain positive volume growth at 2.8 percent and stable values overall, but their performance was less impressive than in previous quarters. The average selling price for sparkling wines fell by 2.8 percent, suggesting that consumers are opting for more affordable options and taking advantage of widespread promotions.

Looking at the first nine months of 2025 as a whole, the market remains negative overall. From January to September, retail wine sales posted a modest increase in value of 0.7 percent but a decrease in volume of 2.3 percent. This trend was supported by another rise in average prices of 3.1 percent.

E-commerce was the only channel to show volume growth during this period, helped by summer demand and more competitive pricing strategies. Cash & Carry remained the weakest segment but showed signs of slowing losses compared to earlier months.

The data from Nomisma’s Wine Monitor Observatory points to ongoing caution among Italian consumers when it comes to wine purchases in retail channels. Price sensitivity remains high and promotional activity is influencing buying decisions across all segments. The market’s performance over the coming months will depend on how these trends evolve as economic conditions and consumer confidence shift heading into next year.