

# Wine in Western Europe

June 2020

**Table of Contents** 

#### INTRODUCTION

Scope

Key findings

#### REGIONAL OVERVIEW

Western Europe slowed by the premiumisation trend and maturity

Slow recovery expected after the big slump in 2020

Large decline in still grape consumption in France

Italy leads volume growth in Western Europe

Southern European countries rely heavily on on-trade sales (1)

Southern European countries rely heavily on on-trade sales (2)

Still light grape driving sales down in Western Europe (1)

Still light grape driving sales down in Western Europe (2)

Hypermarkets and supermarkets dominate where regulation allows

E -commerce on the rise in Western Europe

#### LEADING COMPANIES AND BRANDS

Market consolidation set to increase in Western Europe

Competitive landscape remains heavily fragmented

Top three wine players focused on few markets

Martini benefits from the apéritif trend to lead the wine market

#### FORECAST PROJECTIONS

Italy expected to lead growth in Western Europe

France set to decline further over the forecast period

GDP per capita becomes the key macro driver for wine

Habit persistence contributes to growth prospects in Italy

Southern European countries harder hit by on-trade closures (1)

Southern European countries harder hit by on-trade closures (2)

### **COUNTRY SNAPSHOTS**

Champagne set to continue its downward trend in France

COVID-19 crisis set to impact negatively other sparkling sales

Economy wines gaining ground in Turkey

Austria: market context

Austria: competitive and retail landscape

Belgium: market context

Belgium: competitive and retail landscape

Denmark: market context

Denmark: competitive and retail landscape

Finland: market context

Finland: competitive and retail landscape

France: market context

France: competitive and retail landscape

Germany: market context

Germany: competitive and retail landscape

Greece: market context

Greece: competitive and retail landscape

Ireland: market context

Ireland: competitive and retail landscape

Italy: market context

Italy: competitive and retail landscape

Netherlands: market context

Netherlands: competitive and retail landscape

Norway: market context

Norway: competitive and retail landscape

Portugal: market context

Portugal: competitive and retail landscape

Spain: market context

Spain: competitive and retail landscape

Sweden: market context

Sweden: competitive and retail landscape

Switzerland: market context

Switzerland: competitive and retail landscape

Turkey: market context

Turkey: competitive and retail landscape

UK: market context

UK: competitive and retail landscape

#### **APPENDIX**

About Euromonitor International's Industry Forecast Model

Soft drivers and the Industry Forecast Model

Growth decomposition explained

Significance and applications for growth decomposition

Key applications for Industry Forecast Models

About Via Pricing from Euromonitor International

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focusing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/wine-in-western-europe/report.