

Wine in Western Europe

June 2020

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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

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About Euromonitor International

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