



# OIV's Focus

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## The sparkling wine market

The sparkling wine market has expanded in recent years, boosted by high global demand.

- Production has increased significantly: + 40% in 10 years, while that of still wines only increased by 7% over the same period.
- Although EU countries are still the leaders in this market segment, sparkling wine production as well as consumption is on the rise in the rest of the world.
- Consumption of this type of product is changing: we are seeing a progression from mainly festive consumption to more regular consumption.

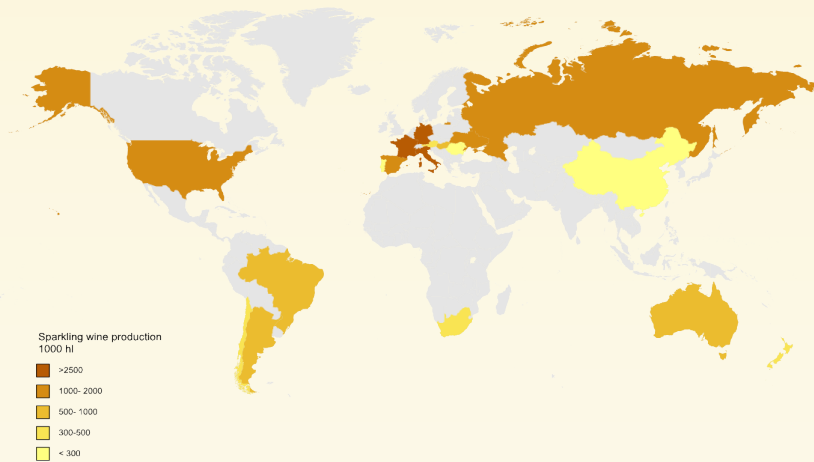
### *Contents*

1. Introduction
2. Sparkling wine production in 2013
3. Consumption
4. Foreign trade

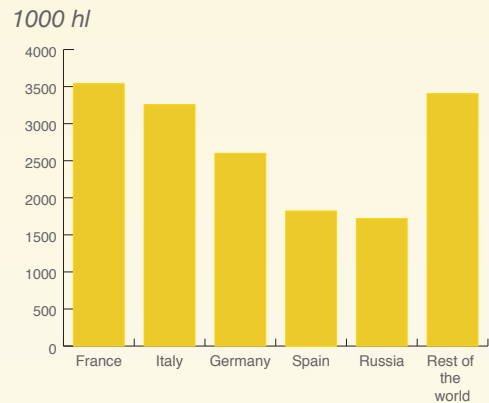


# Sparkling wines

**17,6 mhl** of sparkling wines were produced in 2013 – a figure that corresponds to **7 %** of world wine production



A mere **five countries** produce **74%** of sparkling wines



Sparkling wine *production* has increased **more than 40 %** in 10 years



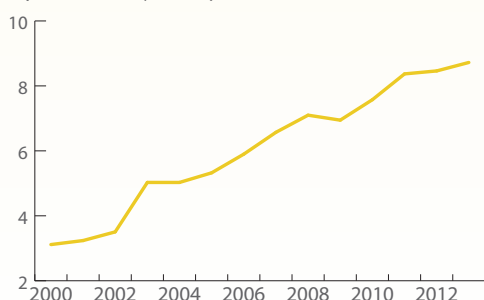
Sparkling wine *consumption* has increased by around **30 %**



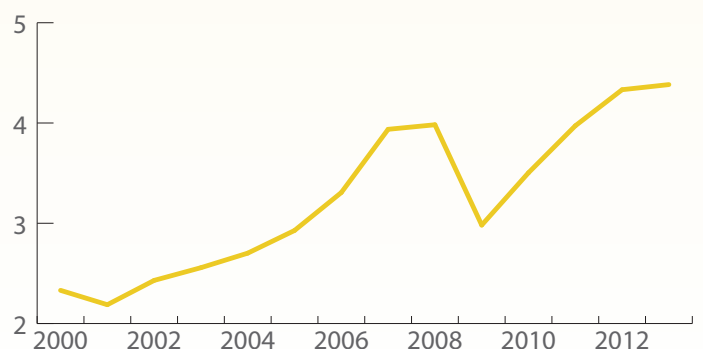
The world sparkling wine trade **has risen** steadily over the past 13 years

**48%** of the volume has been exported

Exportations (in mhl)



Exportations (in billions of Euros)



## 1. Introduction

The purpose of this report is to provide an overview of the sparkling wine segment and its place in the wine sector.

*What is a sparkling wine?*

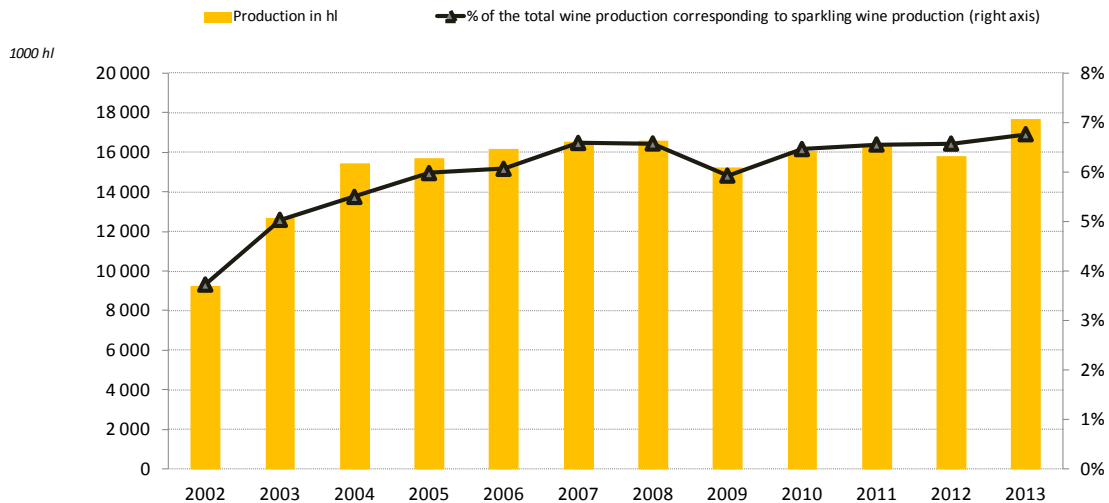
Grouped under the term sparkling wines are naturally (fermented) sparkling and carbonated wines derived from grapes, must or wine. These must have been treated according to the techniques allowed by the International Organisation of Vine and Wine (OIV), including the traditional or *cuve-closé* (closed tank) methods for which carbon dioxide (CO<sub>2</sub>) is of endogenous origin, as well as methods of addition of CO<sub>2</sub> of exogenous origin.

## 2. Sparkling wine production in 2013

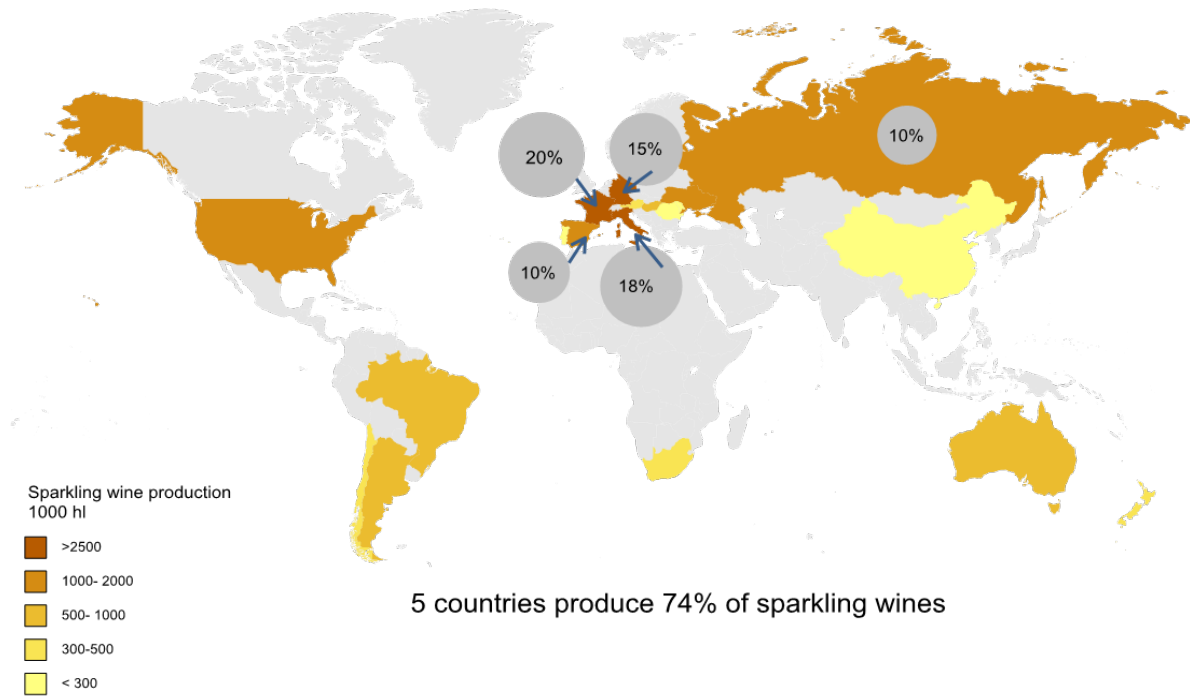
Sparkling wine production reached **17.6 mhl** in 2013, and an increase of **11%** compared with 2012, and + 40% in 10 years, was recorded.

Sparkling wines' share of the total wine production has also increased significantly in recent years. While in 2000 it only represented 4% of world wine production, in 2013 it accounted for over 7%.

### Sparkling wine production

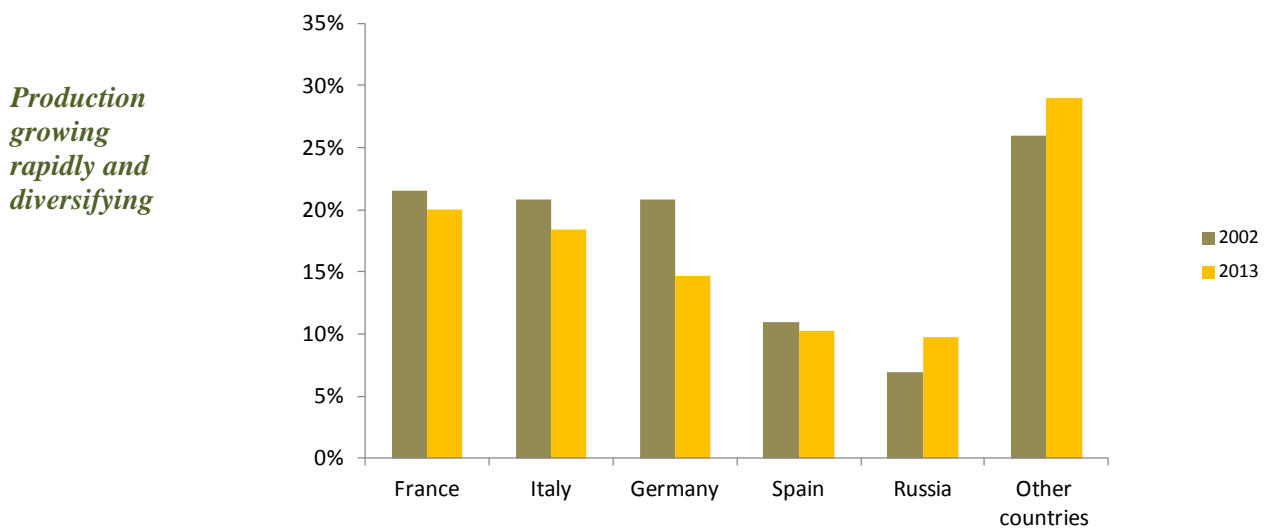


## World sparkling wine production in 2013



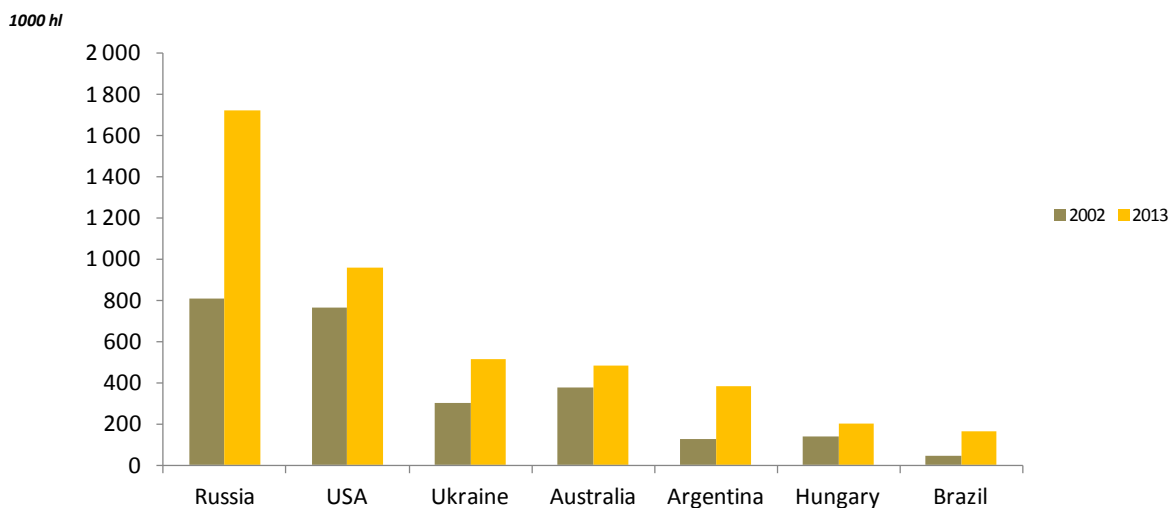
Sparkling wine production is diversifying: although in 2000 74% of sparkling wines were produced by 4 EU countries (France, Italy, Germany and Spain), in 2013 these countries produced no more than 63%.

### Leading countries in sparkling wine production



1. **France** remains the biggest producing country with **3.5 mhl** produced in 2013. Champagne alone accounts for more than 15% of sparkling wines produced globally.
2. With **3.2 mhl**, **Italy** is the second biggest producing country. Its production has increased significantly over the past 10 years, + 22% compared with 2002.
3. Germany is in **third place** with **2.6 mhl**, sparkling wines representing 31% of its wine production.
4. **Spain** produces **1.8 mhl** of sparkling wines using the classic traditional method.

### Countries of growing importance in sparkling wine production



Although production of this type of wine remains concentrated in Western Europe, Eastern European countries as well as Australia and the United States are becoming increasingly important. In these countries, sparkling wine production has greatly increased over the past 10 years (+ 29% in Australia, + 25% in the United States, and three times the size in Argentina [+ 198%] and Brazil [+ 248%]).

### 3. Consumption

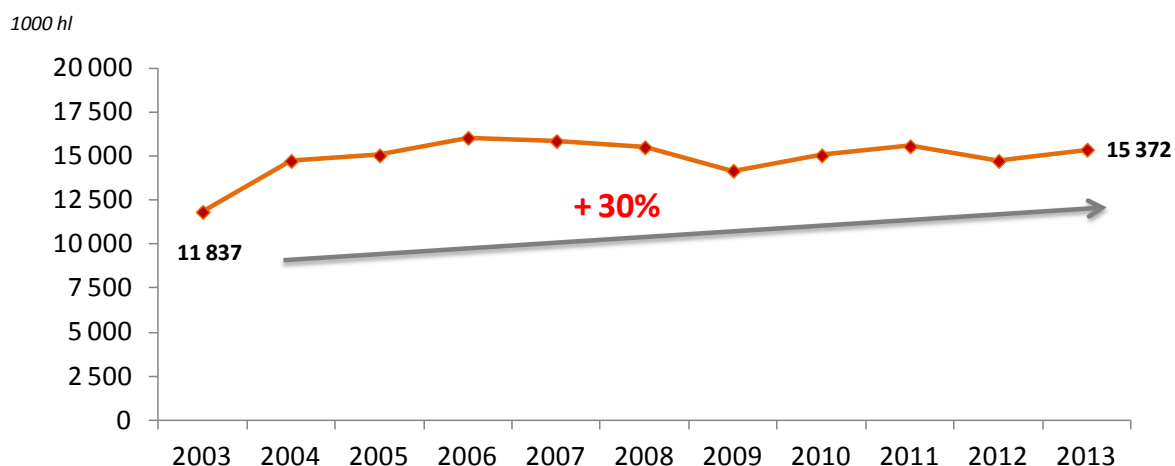
**World consumption evaluated at 15.4 mhl and on the rise**

The seasonality of sparkling wine consumption is its main characteristic. It is generally linked to end-of-year celebrations. However, we are seeing a trend towards a levelling in consumption. It is now spread throughout the year<sup>1</sup>. Sparkling wines have come to be consumed in a more regular and less specific manner; they are thus associated with all celebrations (such as birthdays, retirements, etc.) as well as being consumed as an aperitif and used to make cocktails.

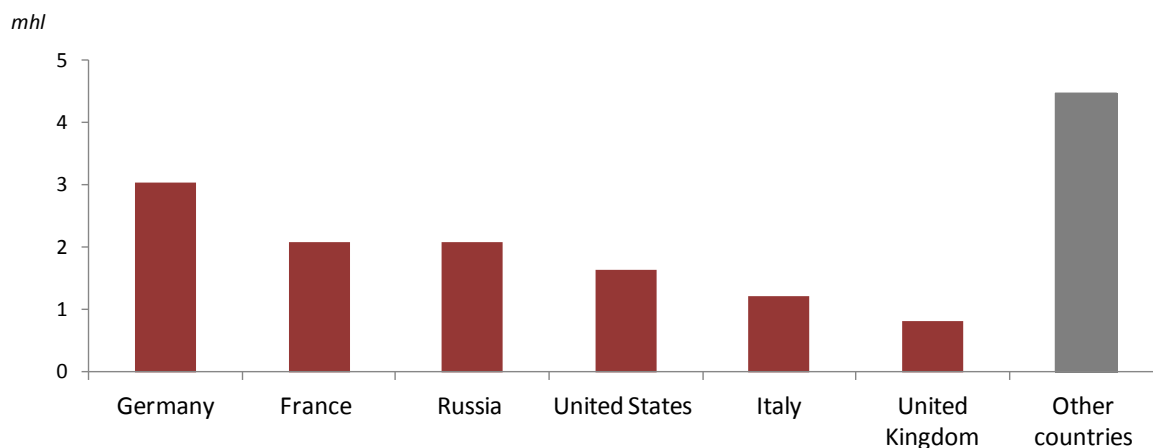
<sup>1</sup> Worldwide survey on the sparkling wine sector, London market research institute TNS, 2012; *Instituto Nacional de Vitivinicultura (INV)*

Despite the fact that world wine consumption has increased by 4% in the last 10 years, a 30% rise in sparkling wines (which represent **6%** of the total wine consumption) was recorded. After a reduction due to the economic crisis, consumption has risen again in the past three years to reach **15.4 mhl**, which is an increase of 4% compared with the previous year.

### Global trends in sparkling wine consumption



### Sparkling wine consumption by country



The German and French sparkling wine markets remain the largest, with 3.1 and 2.1 mhl consumed, respectively, in 2013.

There is, however, a growing interest in these wines outside the EU, particularly in the United States, Australia, Russia and Eastern European countries, whose consumption has significantly increased over the past 10 years.

The growth in Australian consumption of this type of product (+ 7% in 5 years and + 42% in 10 years) is due to Australia's good level of purchasing power and a favourable exchange rate, but also to the democratisation of sparkling wine consumption (a fad).

The consumption of Champagne and, more generally, "bulles" (fine sparkling) wines is also on the rise in China. This country is now the fifth biggest Champagne-importing country in the world, after the EU and just behind the United States, Japan and Australia.

#### Main sparkling wine-consuming countries

<i>Unit: 1000 hl</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2013/2003 Variation
Germany	3134	2992	2838	3090	3047	2922	2820	2924	2813	3251	3052	-3%
France	1509	3220	3364	3589	3429	3458	2457	2120	2446	1403	2084	38%
Russia	967	1363	1556	1626	2307	2271	2113	2509	2553	2363	2084	115%
United States	1090	1166	1173	1222	1243	1209	1251	1386	1566	1593	1650	51%
Italy	1886	2576	2502	2422	1428	1226	1284	1288	1311	1078	1219	-35%
UK	641	670	713	936	756	740	664	765	936	809	815	27%
Australia	348	383	437	457	485	490	461	503	449	459	495	42%
Belgium	156	185	196	215	217	178	283	338	357	417	458	194%
Spain	375	285	269	157	328	318	339	460	375	368	319	-15%
Switzerland	128	127	132	133	149	144	153	161	168	175	174	37%
Netherlands	70	61	77	96	109	96	92	85	94	91	84	20%
Portugal	57	60	70	71	76	79	71	85	44	68	75	31%

#### 4. Foreign trade

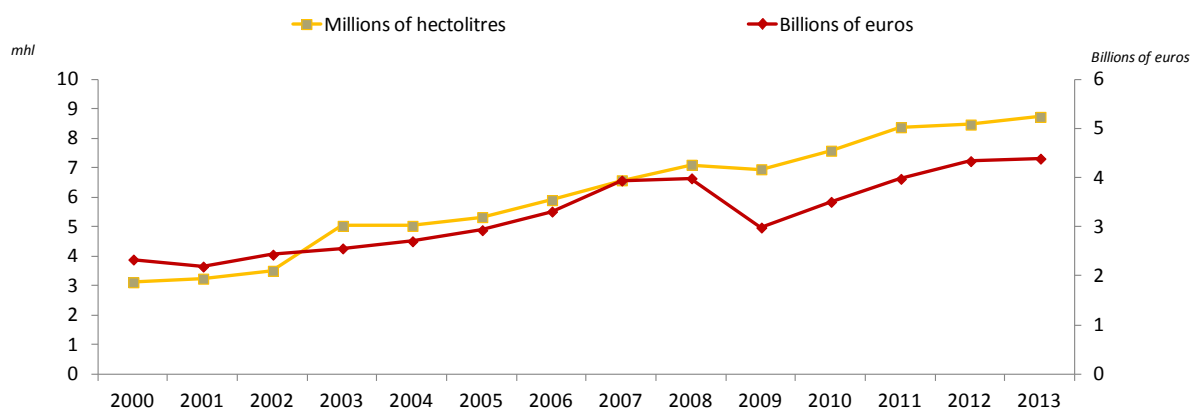
The sparkling wine trade has increased steadily since the end of the last century, in terms of volume as well as in value:

##### *World trade has steadily increased*

- Since 2000, world exports of sparkling wines have more than doubled, with an average annual growth rate of 9%, going from 3.11 mhl to **8.7 mhl in 2013**.
- The growth in terms of value has been relatively slower; the average annual growth rate since 2000 stands at 5%, going from 2.3 billion euros in 2000 to **4.3 billion euros in 2013**. The 2008 economic crisis and its effects on world wine consumption, particularly with regard to high-end products, significantly affected the change in terms of value.



## Exports: trends in terms of volume and value



The share of sparkling wine exports accounts for nearly 9% of the total volume of wine exports and 18% of their value.

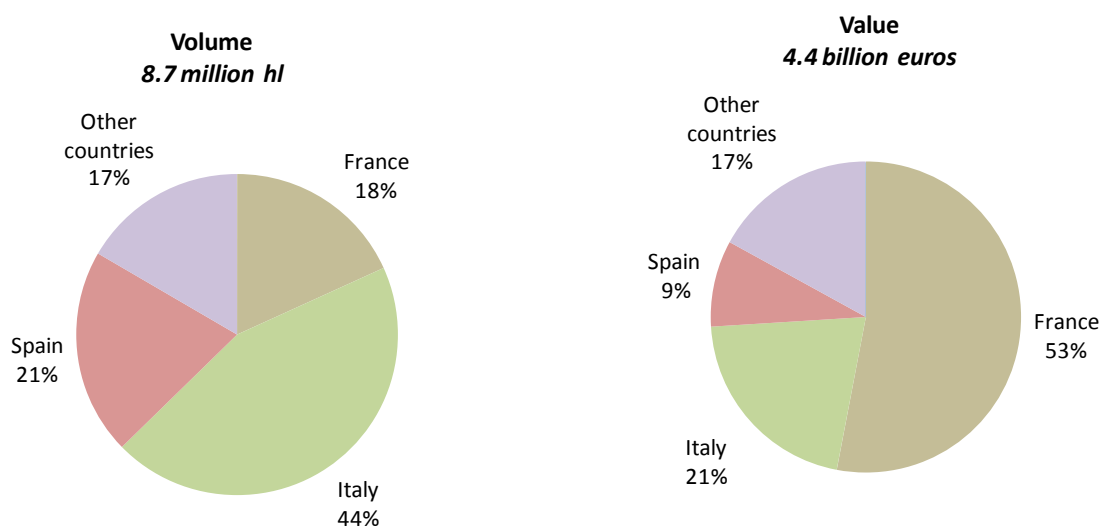


The **three biggest exporters** of sparkling wines represent more than **80% of world exports** in terms of volume and value, with France alone accounting for 53% of the total exports in terms of value.

### *EU: the leader in exports*

The market shares of the biggest exporters have grown significantly in the last 10 years. As mentioned above, sparkling wine exports from France, both in terms of volume and value, were severely affected by the effects of the 2008 economic crisis, which favoured products marketed at a lower price such as Italian Prosecco and Spanish Cava. Nevertheless, it is important to note that Italian and Spanish exports are still worth less than French exports, driven by Champagne (which accounts for over half of the value despite less volume being exported).

## World sparkling wine exports in 2013



Italian and Spanish sparkling wines have become alternatives to Champagne because of their much lower price, particularly in key markets such as the United States and United Kingdom. Yet this reduction in French exports to Anglo-Saxon markets has been offset somewhat by their increase on the Asian market, especially in Singapore, which for the past three years has been the biggest Champagne importer on the Asian continent.

- France has lost 8% of the market, **in terms of value**, while Italy has gained 7% compared with 2008.
- **In terms of volume**, Italy has gained 4% while France and Spain have lost 6% and 2% of the market share, respectively, compared with 2008.
- The role of certain small producing countries or producers of only sparkling wines has increased in recent years. Latvia is a good example: its sparkling wine exports – mainly to Russia – have increased to an average of 5.5% per year in terms of value and 11.8% in terms of volume since 2000.
- Singapore is the country that has experienced the most rapid growth in the sparkling wine trade. It has been the 4<sup>th</sup> biggest sparkling wine exporter in the world since 2000, with 8.7 million litres sold in 2013, equating to over 245 million euros. These are imported wines that are re-exported.

### Imports

The top five importers in the world, excluding Singapore<sup>2</sup>, account for nearly 50% of the total sparkling wine imports, with the United Kingdom and United States each making up 14% of the total.

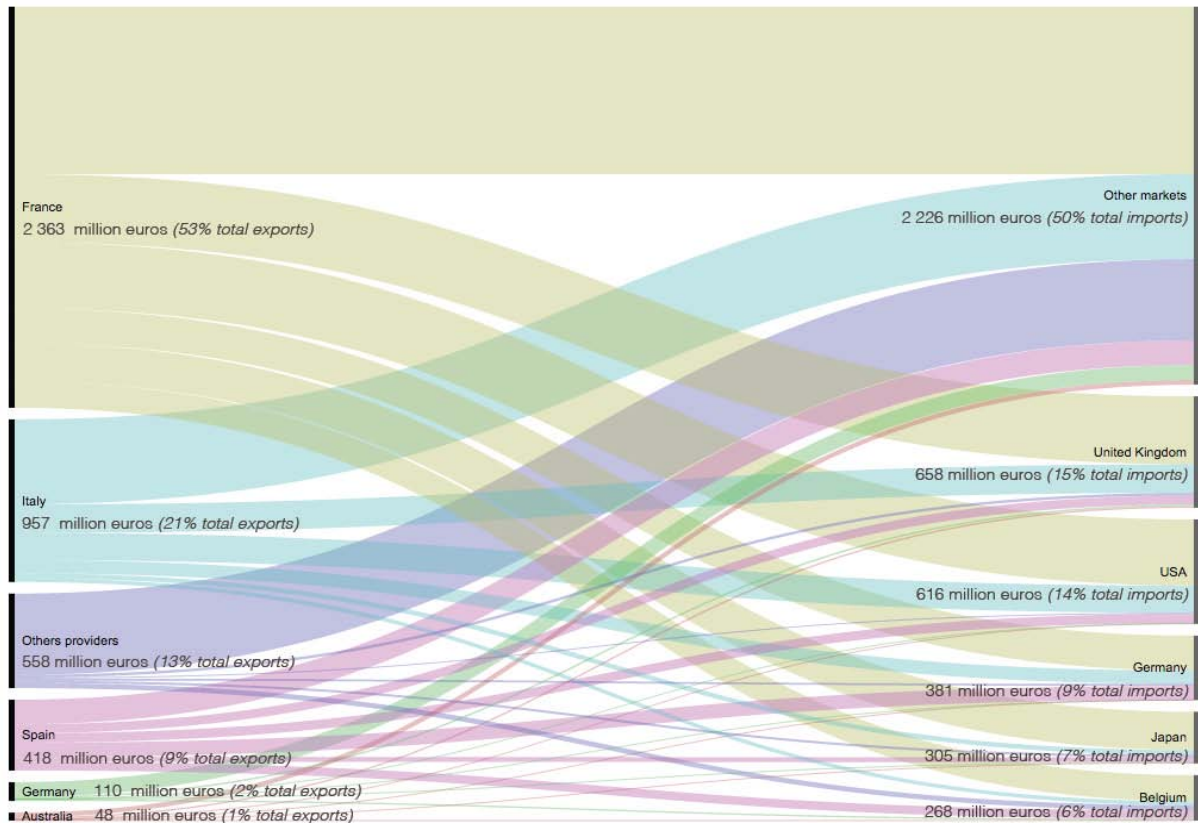
The imports of 10 countries stand at a value of over 100 million euros each and constitute 73.7% of imports worldwide.

<sup>2</sup> Singapore does not rank since the majority of sparkling wines imported are not destined for consumption, but for re-exportation instead, as shown by the export figures.

France is the top provider for all key markets, followed by Italy.

### Trade flows in terms of value in 2013

*Presentations of the top five exporters/producers and the five biggest importers/consumers*



### Abbreviations:

hl: hectolitres

khl: thousands of hectolitres

mhl: millions of hectolitres

### Sources

The data is based on the questionnaire on sparkling wines submitted to OIV Member States. For several countries that did not provide the requested information and for the majority of non-Member States, the data published in this report was estimated using the FranceAgriMer database. Trade data was provided by the "Observatorio Español del Mercado del Vino (OEMV)".

For more information, contact Barbara Iasiello at [stats@oiv.int](mailto:stats@oiv.int)



**International Organisation  
of Vine and Wine**

18 rue d'Aguesseau  
75008 Paris, France  
[www.oiv.int](http://www.oiv.int)  
Tél: +33 1 44 94 80 80

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