

# **THE FUTURE OF WINE**

Global Trends, Growth Drivers and  
Market Opportunities



## MOORE GLOBAL NETWORK STATISTICS

\$5.1bn

Total fee income  
13% growth

116

countries

563

offices

37,199

Partners and Staff

234

firms

## CONTENTS

The Global Wine Market: Trends reshaping the industry...	4
Sustainability and Eco-Friendly Wine Practices.....	6
Natural Wines .....	7
Wine Tourism and Consumer Experiences .....	8
Technology and Innovation in Wine .....	9
Tariffs and Tax Regimes .....	10
Diversity and Inclusion in the Global Wine Industry .....	12
Where the Wine Industry is Heading .....	13



For more information, contact Aleksandra Yakovleva, Sectors and Services Manager at Moore Global, specialising in international market development and strategic support for wine and agri-food businesses.

**Aleksandra Yakovleva**

[aleksandra.yakovleva@moore-global.com](mailto:aleksandra.yakovleva@moore-global.com)



Moore Global Network Limited is a company incorporated in accordance with the laws of England and provides no audit or other professional services to clients. Such services are provided solely by member firms of MCNL in their respective geographic areas. MCNL and its member firms are legally distinct and separate entities owned and managed in each location.



# The Global Wine Market: Trends Reshaping the Industry

The global wine industry is navigating a period of transformation. From shifting consumer behaviors to climate pressures and premiumization, 2025 brings both challenges and opportunities for producers, distributors, and investors.

## DECLINING CONSUMPTION:

Global wine consumption dropped to 214 million hectolitres in 2024 — the lowest level in six decades — as inflation and changing lifestyles impact demand.

## EVOLVING PREFERENCES:

Despite lower volumes, there's a clear shift toward premium and super-premium wines, with quality and story-driven branding gaining traction.

## ECONOMIC AND HEALTH FACTORS:

These are influencing consumption patterns, suggesting a need for adaptation within the industry.

## GLOBAL WINE OUTLOOK — 2025 ESTIMATES:

Metric	Projected Value
Global Revenue	\$347.1 billion
Total Consumption	23.3 billion litres
Average Price per Litre	\$14.89





# Sustainability at the Core: Eco-Friendly Wine Practices

**Sustainability is no longer a niche concern — it's becoming a defining feature of the global wine industry. Consumers, regulators, and trade partners alike are placing growing emphasis on environmental impact, making eco-conscious production not only a value-driven choice, but a strategic imperative.**

## FROM SUSTAINABLE TO REGENERATIVE VITICULTURE

Wine producers around the world are embracing new approaches to vineyard management that prioritize soil health, biodiversity, and long-term ecosystem restoration:

**Organic and Biodynamic Farming:** Increasingly adopted as a baseline, these methods reduce chemical inputs and foster a more natural grape-growing process.

**Regenerative Viticulture:** Goes beyond sustainability by actively improving the land — enhancing carbon capture, water retention, and microbial activity in vineyard soils.

**Water Stewardship:** In drought-prone regions, wineries are investing in innovative irrigation systems, rainwater capture, and drought-resistant grape varieties to secure long-term viability.

## REDUCING THE CARBON FOOTPRINT

Environmental responsibility now extends across the full production and distribution cycle. Leading wineries are reducing emissions by:

Using solar power and renewable energy in production facilities

Minimizing transport-related emissions through local sourcing and smart logistics

Switching to lightweight bottles, recyclable packaging, and alternatives like cans and bag-in-box formats that align with both sustainability goals and modern lifestyles.

## SUSTAINABILITY CERTIFICATIONS: BUILDING CONSUMER TRUST

As environmentally conscious consumers seek transparency and credibility, third-party certifications have become powerful differentiators in a competitive market:

WIETA (Wine and Agricultural Ethical Trade Association) – South Africa

IPW (Integrated Production of Wine) – South Africa

HVE (Haute Valeur Environnementale) – France

These labels validate ethical sourcing, sustainable vineyard practices, and reduced environmental impact — and can enhance brand value both domestically and in export markets.

# Natural Wines: Minimal Intervention, Maximum Character

As wine consumers become more adventurous and ingredient-conscious, natural wines have surged in popularity. These wines reflect a “less is more” philosophy — produced with minimal intervention in both the vineyard and the cellar. For many, they represent a return to authenticity and a deeper expression of terroir.

## KEY CHARACTERISTICS OF NATURAL WINES:

### Spontaneous Fermentation

Natural winemakers often rely on wild, indigenous yeasts rather than commercial strains, allowing fermentation to occur naturally and resulting in greater flavor complexity.

### Low Additives and No Sulfites

Many natural wines are made with little to no sulfites, and exclude additives such as sugars, acids, or stabilizers. This purist approach appeals to health-conscious and ingredient-aware drinkers.

### Unfiltered and Unfined

Natural wines are often cloudy in appearance and may contain sediment. While unconventional to some, these visual and textural differences are embraced by fans for their “raw” and artisanal quality.

## TRADITIONAL MEETS TREND: GEORGIA'S ANCIENT WINEMAKING RENAISSANCE

Natural and traditional winemaking methods are not just passing trends — they're shaping a new generation of producers and drinkers who value story, craftsmanship, and connection to the land.

One of the most fascinating developments in the global wine landscape is the growing recognition of Georgia's ancient qvevri winemaking tradition. This method, which dates back over 8,000 years, involves fermenting and aging wine in large clay vessels called qvevris that are buried underground. The technique yields wines with distinctive earthy flavors, oxidative notes, and rich textures that reflect deep-rooted cultural heritage.

As producers and consumers seek authenticity and heritage, Georgia's practices are influencing natural winemakers worldwide and contributing to a broader shift toward low-intervention, origin-driven styles.



Natural wines may not be for everyone — but they cater strongly to curious, experimental, and authenticity-seeking consumers.



# Wine Tourism and Consumer Experiences

Wine tourism is evolving into a key driver of regional development and global brand visibility. Around the world, consumers are seeking immersive, authentic wine experiences that connect them more closely with producers, local traditions, and terroir.

From iconic destinations like **Bordeaux, Napa Valley, and Tuscany**, to fast-growing regions in **South Africa, Argentina, Georgia, and New Zealand**, wine tourism is creating economic value, stimulating rural development, and strengthening brand loyalty. Governments and local enterprises increasingly view wine tourism as a pillar of sustainable growth.

Consumer demand for education and experience is also expanding. Wine courses, guided tastings, and virtual masterclasses — available from Cape Town to Tokyo — are helping audiences deepen product knowledge and appreciation.

## BEYOND THE GLASS: CULTURAL INTEGRATION AND CULINARY TOURISM

Across continents, wineries are diversifying their offer by collaborating with chefs, artists, and regional tourism boards. Integrated events — from vineyard dinners in **Chile**, to harvest festivals in **Portugal**, to food-and-wine trails in **Australia** — position wine as part of a broader cultural and gastronomic experience. These offerings are helping emerging regions stand out on the world stage and attract international attention.

# Technology and Innovation in Wine

Innovation is accelerating across the global wine sector, transforming how wine is grown, made, marketed, and sold. From smart viticulture to digital commerce, technology is helping producers address operational challenges and meet evolving consumer expectations.

Across all continents, producers are leveraging technology to respond to climate challenges, improve efficiency, and connect directly with global audiences.

## E-COMMERCE AND DIRECT-TO-CONSUMER

The rapid expansion of online wine retail — especially post-pandemic — has reshaped distribution models. In markets like the US, UK, China, and Australia, digital platforms and subscription services allow producers to build direct relationships with consumers, bypassing traditional intermediaries and accessing real-time feedback. Emerging markets are also embracing mobile-first solutions to reach new demographics.

Personalisation is key: AI-driven recommendation engines, curated wine clubs, and targeted marketing campaigns are helping brands stand out in a crowded digital space.

## SMART VINEYARD TECHNOLOGY

In the vineyard, producers are leveraging precision tools to optimise yield and quality while responding to environmental pressures. Examples include:

Drones and remote sensors for monitoring vine health and soil conditions

Weather-based irrigation systems that conserve water in arid regions like South Africa and California

Data analytics that support harvesting decisions and disease prevention

These tools are especially valuable in regions facing climate volatility, such as Southern Europe, South America, and parts of Australia.

## BLOCKCHAIN AND SUPPLY CHAIN TRANSPARENCY

Global consumers increasingly demand transparency and traceability. In response, some producers — particularly in France, Italy, and Japan — are piloting blockchain-based systems that certify origin, production methods, and handling throughout the supply chain. This builds trust and combats counterfeiting in export-heavy markets.

## Technology is helping equalise the industry

Smart tools are narrowing the gap between established and emerging producers — making innovation a key driver of inclusive growth in the wine sector worldwide.



# Tariffs and Tax Regimes: Navigating the 2025 Trade Landscape

## NEW TARIFFS RESHAPE IMPORT DYNAMICS

Tariffs and taxes are now strategic variables — impacting pricing, trade flows, and investment planning across the global wine sector. For producers and distributors alike, 2025 brings a complex mix of policy shifts, regulatory divergence, and opportunities for proactive market positioning.

In early 2025, the current U.S. administration introduced broad-based tariffs on imported wines: 20% on shipments from the European Union and 10% on imports from Australia and New Zealand. These measures disrupted long-established supply relationships and drove up prices for U.S. consumers. Mid-sized producers with cross-border supply needs or export ambitions are among the most exposed.

While some planned reciprocal tariffs were temporarily suspended in April 2025, this moratorium did not include wine. Existing tariffs on EU, Australian, and New Zealand wines remain in place—underscoring the targeted nature of the policy and the need for tailored strategic responses.

## GLOBAL RETALIATION AND DIPLOMATIC STRAIN

Retaliatory measures by countries such as Canada have added complexity to the trade landscape. U.S. wine exporters — particularly smaller firms — now face tighter margins, delayed shipments, and added compliance costs.

The European Union has so far excluded wine from its own countermeasures, signalling a cautious approach aimed at preserving long-term trade relationships. Nonetheless, tensions persist. Reports indicate potential U.S. action targeting premium segments such as French Champagne, which could trigger further escalation.

## LEGAL PUSHBACK AND UNCERTAINTY

Several U.S. states and industry groups have filed legal challenges against the wine tariffs, citing a lack of congressional approval and economic harm to domestic businesses. These lawsuits have introduced a new layer of unpredictability — complicating supply planning, capital allocation, and long-term investment.

## TAX REGIMES AND PRODUCT STRATEGY

Excise tax systems vary widely across jurisdictions and increasingly influence product development. In the UK, U.S., and Japan, reduced rates for lower-alcohol wines are incentivising the production of lighter styles and low-ABV blends.



“Tariffs are no longer a background issue. For internationally active wine producers, understanding trade rules and acting early has become a core part of strategic planning.”

Markus Bitzer



Within the EU, a harmonised excise framework allows for national flexibility. Countries like France and Italy maintain low wine duties, while others such as Sweden pursue stricter taxation aligned with public health goals. In emerging markets such as South Africa and Brazil, combined tariff and tax burdens remain a significant barrier to market entry.

## TRADE AGREEMENTS AND PREFERENTIAL ACCESS

Free trade agreements (FTAs) offer opportunities for cost optimisation and market expansion — provided that producers meet origin criteria and maintain proper documentation. The EU currently maintains over 70 FTAs, including with Japan, Canada (CETA),

and Chile. Agreements such as CPTPP and the UK-Australia deal provide further access in the Asia-Pacific region.

For mid-sized producers, these frameworks are critical for preserving competitiveness, enhancing margins, and diversifying geographic risk. Maximising their benefit requires coordinated execution across legal, compliance, and commercial functions.



# Diversity and Inclusion in the Global Wine Industry

The global wine industry is becoming more inclusive, with growing recognition of the value that diverse voices, regions, and perspectives bring to the sector’s evolution. Progress is visible in both geographic expansion and professional representation.

## EMERGING REGIONS ON THE RISE

High-quality wines from regions such as Eastern Europe, South America, Sub-Saharan Africa, and Asia are gaining global attention. Producers in Romania, Uruguay, Kenya, India, and beyond are redefining traditional wine maps — introducing new terroirs, grape varieties, and styles to international markets.

## BROADENING REPRESENTATION IN THE INDUSTRY

Across continents, there is growing momentum to elevate underrepresented groups — including women, BIPOC professionals, and young entrepreneurs — as winemakers, sommeliers, and industry leaders. Programs supporting training, visibility, and access to capital are helping reshape industry norms and leadership.

A more inclusive wine industry is better equipped to adapt, differentiate, and grow globally.

Understanding the global wine market starts with asking the right questions — and Moore knows where to look.



A diverse wine industry drives innovation — opening doors to new ideas, products, and markets.

# Strategic Shifts: where the Wine Industry is Heading

In 2024, global wine consumption fell to 214.2 million hectolitres—the lowest level since 1961—highlighting a significant shift in consumer behavior. Despite this decline, the global wine market’s revenue is projected to reach \$347.1 billion in 2025, with expectations of growth to \$412.9 billion by 2027.

This paradox indicates a transformation in the industry: while overall consumption decreases, there’s a notable increase in demand for premium, organic, and low-alcohol wines, especially in emerging markets across Asia, Africa, and Latin America.

↑18.9%

Projected growth in global wine market value, 2025–2027 (from \$347.1B to \$412.9B)





## Trend 1: Emerging Markets and Alternative Grape Varieties

### GROWTH BEYOND TRADITIONAL BORDERS

As traditional wine markets stabilise or decline in volume, emerging economies are driving the next phase of global demand. Urbanisation, rising disposable incomes, and growing middle classes are increasing consumer exposure to wine—particularly among younger, aspirational segments.

**Asia:** China's wine imports, though below peak levels, are rebounding as tariffs shift and the gifting culture evolves. Meanwhile, India, Vietnam, and South Korea are seeing early-stage growth, with local wine appreciation shaped by premium positioning, dining culture, and digital education.

**Africa:** In markets such as Kenya, Nigeria, and South Africa, wine consumption is growing thanks to a mix of local tourism, hospitality investment, and rising lifestyle adoption in urban areas. South Africa is also emerging as a hub for intra-African exports.

**Latin America:** Beyond established exporters like Chile and Argentina, countries including Mexico, Brazil, and Peru are strengthening both production and domestic demand. Increased interest in artisanal and terroir-driven wines is attracting attention from sommeliers and importers.

### Rethinking Growth at the Edges

Emerging regions and climate-smart varieties are no longer niche—they're reshaping how the wine industry defines competitiveness and long-term relevance.

### ALTERNATIVE GRAPE VARIETIES AND CLIMATE ADAPTATION

As climate volatility intensifies, producers are turning to alternative grape varieties that offer both resilience and differentiation.

In Southern Europe, native drought-tolerant grapes are being reintroduced to replace international varieties stressed by extreme heat and shifting growing seasons.

Australia, California, and parts of Portugal are exploring Mediterranean-origin varieties—Grenache, Nero d'Avola, Touriga Nacional—for their adaptability and stylistic innovation.

In Eastern Europe and the Balkans, local grapes such as Fetească, Plavac Mali, and Kadarka are gaining renewed interest, offering uniqueness for niche and premium markets.

This dual movement—toward new consumer geographies and rediscovered varieties—signals a shift from standardisation to regional identity and resilience-based strategy.

## Trend 2: Premiumisation, Marketing and Brand Collaborations

### SHIFTING FROM VOLUME TO VALUE

Across all key markets, wine consumption is becoming more selective. Consumers are increasingly choosing quality over quantity, driven by health awareness, premium lifestyle positioning, and a growing interest in authenticity and craftsmanship.

The premiumisation trend is especially evident in:

- Limited-production labels and small-lot vintages
- Story-led branding, focused on origin, sustainability, and heritage
- Luxury positioning, driven by packaging, price, and exclusivity

This is not only a retail trend—it also shapes how producers define success. Volume-driven models are being replaced by value-driven propositions, where margins matter more than litres.

### NEW CHANNELS AND STORYTELLING PLATFORMS

Digital marketing and social commerce are creating new routes to brand visibility and loyalty:

- Influencer and sommelier partnerships allow producers to tap into lifestyle and gastronomy audiences
- Direct-to-consumer platforms, subscription models, and personalised offers increase retention and brand control
- Augmented reality (AR) labels, digital tasting rooms, and virtual content enhance the storytelling experience—especially for Gen Z and younger Millennials

### BRAND COLLABORATIONS AND CROSS-INDUSTRY FUSION

Strategic collaborations are expanding wine's cultural footprint. From partnerships with chefs, artists, designers, and luxury fashion houses, to co-branded collections and immersive events, wine is increasingly integrated into broader lifestyle ecosystems.



## Trend 3: Technology and Innovation in Wine

### SMARTER PRODUCTION, SMARTER DISTRIBUTION

Technology is no longer peripheral—it is embedded in every part of the wine value chain. From the vineyard to the shelf, innovation is reshaping how wine is produced, positioned, and purchased.

- In the vineyard, producers are using drones, climate sensors, and AI-driven forecasting to improve yield, quality, and resource efficiency.
- In production, data modelling helps predict fermentation outcomes, manage risks, and standardise excellence across vintages.
- On the business side, technology supports faster response to consumer feedback, faster adaptation to market shifts, and better alignment across teams.

### E-COMMERCE AND DIGITAL REACH

Post-pandemic shifts have accelerated the role of direct-to-consumer models, especially in markets such as the US, UK, China, and Australia. Digital platforms and subscription models allow wineries to:

- Bypass traditional intermediaries
- Personalise offerings based on purchase data
- Build longer-term consumer relationships

Mobile-first commerce is also gaining traction in emerging regions, opening access to new, younger audiences.

### BLOCKCHAIN AND TRANSPARENCY TOOLS

Consumer demand for traceability and origin verification is growing—especially in premium segments. Blockchain, digital IDs, and smart labeling are being piloted to:

- Combat counterfeiting
- Verify sustainability claims
- Strengthen brand trust in export-heavy markets

These tools are particularly valuable in regions with rising fraud risk or where ESG performance matters for international buyers.



Smart adoption of technology enables better decisions, stronger margins, and deeper trust across the value chain.

## Trend 4: Wine Tourism and Consumer Experiences

### EXPERIENCE AS A BRAND STRATEGY

Wine tourism has become more than a marketing tool—it is now a core brand strategy for producers worldwide. From Bordeaux to Baja, consumers are seeking immersive, sensory-rich experiences that connect them with the people, place, and philosophy behind the bottle.

Top-performing wineries are investing in:

- On-site experiences: tastings, harvest events, vineyard dining
- Regional storytelling: architecture, food, and design that reflect terroir
- Hospitality integration: boutique lodging, culinary collaborations, curated itineraries

These initiatives support not just sales—but long-term loyalty, DTC retention, and word-of-mouth influence.

### GLOBAL TOURISM, LOCAL IMPACT

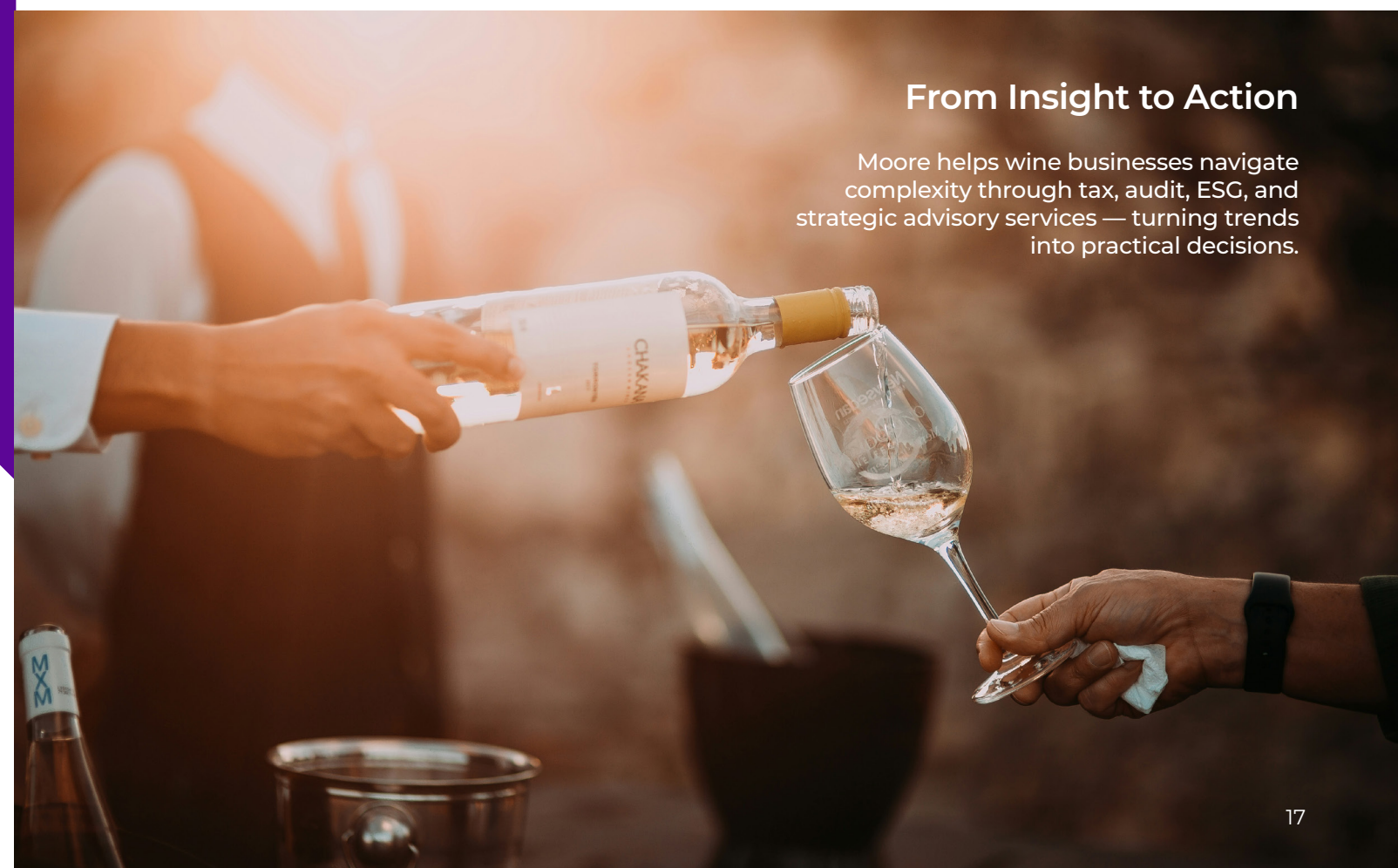
While iconic destinations continue to attract high-end travelers, emerging regions are leveraging tourism to build visibility and regional identity. Markets such as Georgia, South Africa, Uruguay, and India are investing in wine routes, festivals, and agrotourism as part of broader economic and cultural development.

### BEYOND THE GLASS

Culinary partnerships and cultural events are helping wineries position themselves within a broader lifestyle and hospitality ecosystem. This multidimensional approach creates deeper relevance and more durable customer relationships—especially in competitive markets.

### From Insight to Action

Moore helps wine businesses navigate complexity through tax, audit, ESG, and strategic advisory services — turning trends into practical decisions.





## CONTACT US

At Moore, we work alongside clients to bring clarity to complexity—across borders, sectors, and evolving market conditions.

To explore how we can support your business, reach out to your local Moore firm or visit:

[www.moore-global.com](http://www.moore-global.com)



Moore Global Network Limited is a company incorporated in accordance with the laws of England and provides no audit or other professional services to clients. Such services are provided solely by member firms of MGNL in their respective geographic areas. MGNL and its member firms are legally distinct and separate entities owned and managed in each location.