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» The German wine market and the potential for (naturally) low-alcohol wines«

with

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»In order to grow we must be open to new ideas… new ways of doing things… new ways of thinking.«

– George Raveling –

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Insight into Germany

1 The economic situation

2 The wine market

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Insight into Germany

1 The economic situation

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Germany – The economic Situation

Slight economic growth (GDP) following two years of recession:

2023: -0.9%
2024: -0.2%
2025: 0.2%
2026 (estimated): 0.6 to 1.3%

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- **3rd in the world: the world's third-largest economy after the USA and China**
- **1st in Europe: the largest and economically strongest member state**
- **However: in terms of economic growth, Germany is currently among the lowest-performing countries worldwide**

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Germany – Import-Export Market

- Agricultural producer: No. 2 in Europe (€76 billion)
- Top exporting country: No. 3 worldwide (in 2024/2025)
- Top importing country: No. 3 worldwide, No. 1 in Europe

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2 The wine market
>> Focus on: Italian wine imports

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Wine imports (Feb. 2025 – Jan. 2026, DWV):

- **Germany's total imports from all countries: 12,759,000 hl (+0.6%) worth €2.674 billion (+7.2%)**

- **Total German imports from Italy in the same period according to the DWV: 4.67 million hl (+4.8%) worth €1.073 billion (+12.1%)**

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Wine Import Trends (January 2026 vs January 2025):

- **from Italy to Germany in January 2026 totalled: 281,000 hl (-16.5% vs January 2025) worth €68 million (-9.2%)**

- **Sparkling wine continues to rise (+16.7% by volume, +14.6% by value), and the fortified wine category is also up (+52.2% by volume, +17.8% by value)**

Other categories fell down, particularly:

- **white wines without DOC/DOCG, which fell sharply (-32.5% by volume, -20.2% by value)**
- **as did the (also rather insignificant) category of aromatised wines (-37.7% by volume, -20.4% by value)**

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Characteristics of the German wine market

- **competitive**
- **cut-throat market**
- **price-sensitive**
- **best value for money**

Distribution channels I

- Wine sales are largely through food retailers (Discount stores and supermarkets): 64 % (in 2025)

- Average prices in food retail:

>> foreign wine: €2.79/0.75 litre (2024)
>> German wine: €3.35´/0.75 litre (2024)

- Important food retailers: Aldi, Lidl, Rewe, Edeka

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Distribution channels II

The remainder of wine sales is distributed among:

- **Specialist retailers: Hawesko, Kölner Weinkeller,...**
  Specialists in Italian wines: Freund, Vinissimo, GES Sorrentino, E&F, Schlumberger, Weinwolf, Abayan, Mack & Schühle, Saffer...

Distribution channels III

The remainder of wine sales is distributed among:

- Hotels and restaurants: including Schlumberger, and a significant amount of direct sales from Italy
- Direct sales: for German wineries

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Market shares of Italian wines (NielsenIQ HomeScan Panel, Q1 2026, in per cent)

- **Sales volume: 19.4% of total wine sales (25.2% red wine, 17% white wine, 11.3% rosé)**
- **Turnover: 21.9% of total wine sales (31.5% red wine, 15.6% white wine, 12.4% rosé)**

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3 The consumer

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The German consumer

Wine consumption in Germany is steadily declining:

2023/2024: 22.2 litres/capita (16 years +) still wine and 3.6 litres of sparkling wine

2024/2025: 21.5 litres/capita (16 years +) still wine and 3.5 litres of sparkling wine

This means that every German drank one bottle less of wine last year!

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The German consumer

Total consumption in 2024/2025:

17.8 million hectolitres of wine and sparkling wine: -4% on the previous year

>>Top 4 in the world for wine consumption

>>Top 8 for per capita consumption

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Reasons for the decline in consumption:

- **changes in consumer behaviour**
- **rising living costs**
- **economic uncertainties**
- **geopolitical crises**
- **demographic change**
- **increased health awareness**
- **Wine is too complicated for Generation Z**

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Consumer trends

- **lighter**
- **simpler, less complicated**
- **white wine**
- **sparkling**
- **RTDS**
- **easy drinking**
- **good design**
- **brand**

>> price is key

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Figures (Germany): 2024 vers. 2023

- non-alcoholic wine (trade)
  - + 17% buyers
  - + 86% sales volume
  - + 68% sales value

  - **market share:** 2% (march 2026)

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Figures (Germany): 2024 vers. 2023

- non-alcoholic sparkling wine (trade)
  - 20 Mio. bottles
  - + 2 Mio. bottles
  - + 9,4% sales volume

  - **market share:** 7,5% (estimated)

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Reasons for growth:

- quality improvement
  - new technologies
  - better base wines
- contents
  - carbon dioxide (sparkling wines)
  - tannins/wood
  - aged wines
  - additives herbal and tea extract

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Reasons for growth:

- change in consumer behaviour (growing emphasis on health and wellness, lifestyle, social movement)
- increased consumer acceptance
- non-alcoholic mixed drinks

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(naturally) low-alcohol wines:

Advantages (for marketing)

- natural
- more sustainable
- more flavour and complexity
- lower alcohol content
- "healthier“
- trendy - meets consumer preferences

(naturally) low-alcohol wines:

Challenges (for marketing)

- effective communication
- go-to-market strategy
- raising awareness
- generating demand
- Differentiation from technical made low-alcohol wines
- Competition to the Kabinett category: light wines (mainly from the Mosel): 7%–11.5% depending on residual sugar