

## SUMMARY

Publication 2020

Key figures 2018

# Rosé Wines World Tracking: confirmations and new trends!

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### ROSÉ WINES WORLD TRACKING IS:

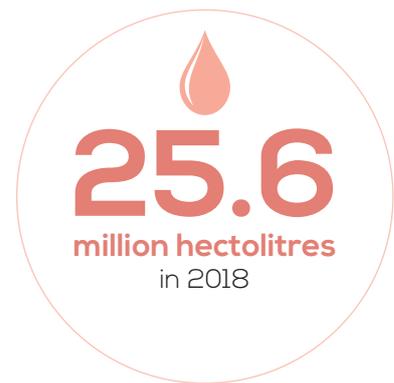
- 45 countries studied
- Approximately 20 experts consulted to gain insight into the latest market trends
- Use of numerous consumer panels
- Tracking since 2002, throwing up long-term trends
- A unique tool recognised by industry members



Published in February 2020

Source: CIVP/FranceAgriMer – Dowel Stratégie

# Consumption



Global rosé consumption rose from 18.3 million hectolitres in 2002 to 25.6 million hectolitres in 2018, an increase of 40%! The countries of Western Europe, long-standing wine producers, and the United States, are the world's largest rosé consumers.

Posting strong growth for the last 15 years, **global consumption of rosé wine reached a new all-time score in 2018**, with a staggering surge of 9 % in 2018 compared with 2017.

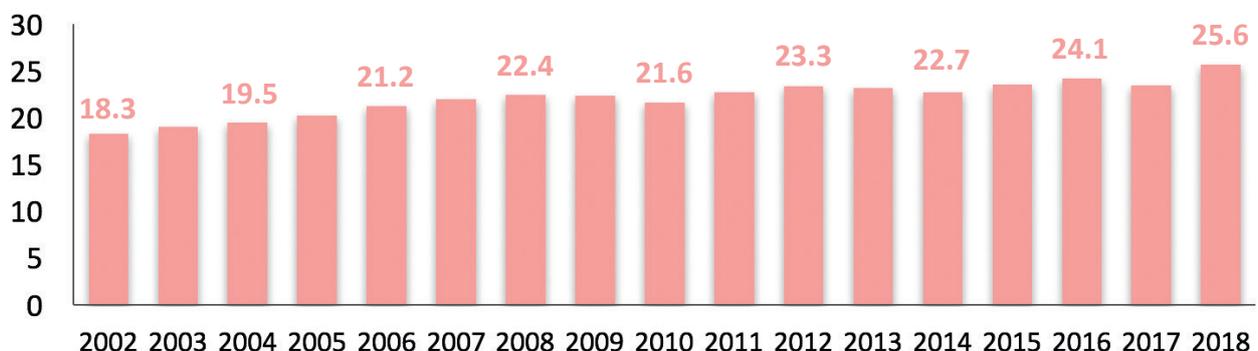
Global consumption of rosé now stands at 25.6 million hectolitres, equivalent to **11.2% of overall still wine consumption for the three colours**, which is unprecedented.

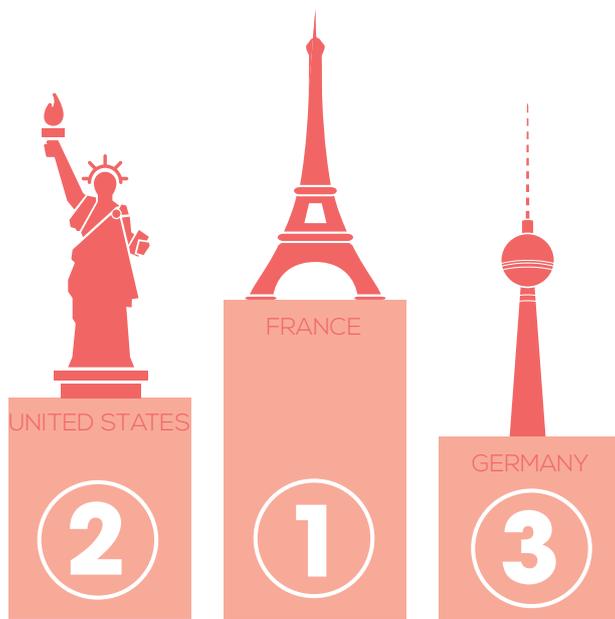
Growth of still wine consumption in 2018 was clearly driven by rosé.

The two leading consumer countries that are France and the United States, are extremely dynamic:

- **France (34% of global consumption** in 2018, + 3 points in 10 years) accounted for over a third of global rosé consumption.
- **For the United States (20% of global consumption** in 2018, + 4 points in 10 years): rosé consumption has skyrocketed. **it surged by 43%** in the off-trade in 2018!

Development of global rosé wine consumption from 2002 to 2018  
(in million hl)





Another noteworthy fact is that in the United States, consumption of rosé is still **below 2 litres a year per capita**, (14th rank worldwide), which suggests that there is still strong potential for growth in this market.

A trend that was already witnessed the previous year, i.e. America’s drop in consumption of ‘blush’ and concurrent growth in volumes of dry rosé, gained even greater traction in 2018.

**These 2 countries now account for over half of global rosé wine consumption** (their combined market share has risen from 47% to 54% in ten years).

Conversely, over the past ten years, **Germany, Italy and Spain saw their consumption decline**. Spain has witnessed the largest decline since 2002: **-70%**.

Concurrently with this, **consumption of rosé wine in South Africa has grown to such an extent that since 2016 it has outstripped Spanish consumption**.

**Also of note is that in the United Kingdom, after three years in decline, consumption of rosé wine showed renewed growth in 2018.**

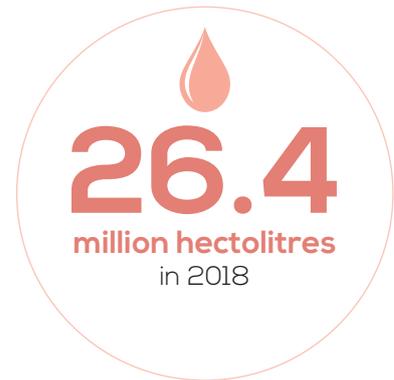
To complete the picture, **Scandinavia has seen a significant increase in consumption of rosé** since 2008. It has risen three-fold in Denmark, Sweden and Norway over the past ten years.

The top trio in 2018 showed no change on 2017: **France, the United States and Germany.**

### ROSÉ WINES WORLD TRACKING

Created in 2002, Rosé Wines World Tracking is the result of a collaboration between the Provence Wine Council (CIVP) and FranceAgriMer. It compiles, analyses and disseminates data on the production and consumption of rosé wines in 47 key countries, including France. This enables us to follow market trends and developments across the globe to help with strategic decision-making.

# Production



Global rosé production rose from 20 million hectolitres in 2002 to 26.4 million hectolitres in 2018, a rise of 31% with some periods showing growth (from 2002 to 2010) and some decline (2011 to 2017).

Production of still and rosé wine soared again in 2018 after a fall in 2017, the year when the main wine producer countries experienced a very small crop. In 2018, the share of rosé in production of still wine reached a record high. France confirmed its status as the leading producer of rosé, now accounting for a quarter of global production! Its European neighbours witnessed declining production, in favour of Southern Hemisphere producer countries along with Central and Eastern Europe.

For several years, rosé wine production has remained stable.

Due primarily to weather conditions, rosé production dropped to a record low in 2017, **but in 2018 it reached an all-time high of 26.4 million hectolitres!**

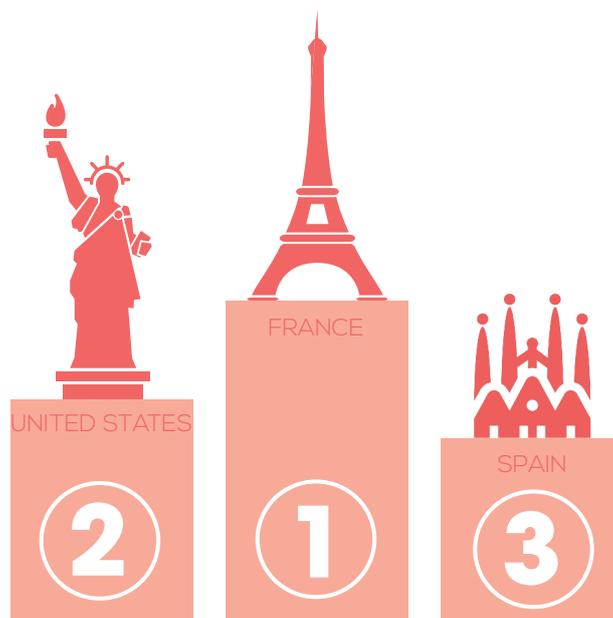
**That equates to a surge of 31% in just one year (2018/2017).**

**Rosé's share of still wine production for all three colours** has never been so high: it now stands at 10%. **For France and the United States, it reached 22% in 2018.**

After a period of significant decline between 2014 and 2017, **France** witnessed a rapid uptick in 2018, rising from 5.5 million hectolitres in 2017 to **7.5 million in 2018**. Production also reached a record high in the **United States** at **5 million** hectolitres and in **Spain** which, after constant decline since 2013, **reached its highest output in ten years.**

Development of global rosé wine production from 2002 to 2018  
(in million hl)





The ranking of the main rosé producer countries **remained unchanged in 2018: the trio France, the United States and Spain even strengthened their leadership position. Their production alone accounted for 64% of rosé wine production by volume worldwide**, compared with 60 % in 2017.

**Italy** has lowered production over the past ten years (it has halved in 10 years) although in 2018, an upturn in the production of rosé is noticeable.

**Among the 'Top 10', one change is noteworthy: Portugal exited the ranking whilst Romania entered.**

Ultimately, several countries have witnessed a **strong increase in production** over the past few years. They include **Chile, South Africa** and several countries in **Central and Eastern Europe**:

- Among 'new producer countries' (South Africa, Chile, Argentina), we observed a significant increase in production of rosé wine between 2008 and 2018. Production has risen by 2.5 in South Africa and 4.7 in Chile in ten years.

- As for Central European countries, production has also risen sharply in ten years. For instance, over the period, Austria, Hungary, Moldova, Romania and Switzerland grew in the range of 50%, equating to 50,000 hectolitres each.

## A SUMMARY OF CONSUMPTION & PRODUCTION

The rosé market is traditionally in tight supply (as a reminder, in 2017 rosé production did not cover demand), but in 2018 the production/consumption ratio turned positive for the first time since 2014 due to the strong increase in French rosé wine production in 2018 (+ 2 million hectolitres between 2017 and 2018).

# Imports

**10.9**  
million hectolitres  
in 2018

Imports of rosé wine have been rising since 2002 (3.7 million hectolitres) and reached 10.9 million hectolitres in 2018. As in 2017, approximately 4 in every ten bottles of rosé drunk were imported!

In 2018, 40% of rosé volumes drunk worldwide were imported. Global imports of rosé wine rose from 10.2 million hectolitres in 2017 to 10.9 million hectolitres in 2018, an increase of 7%.

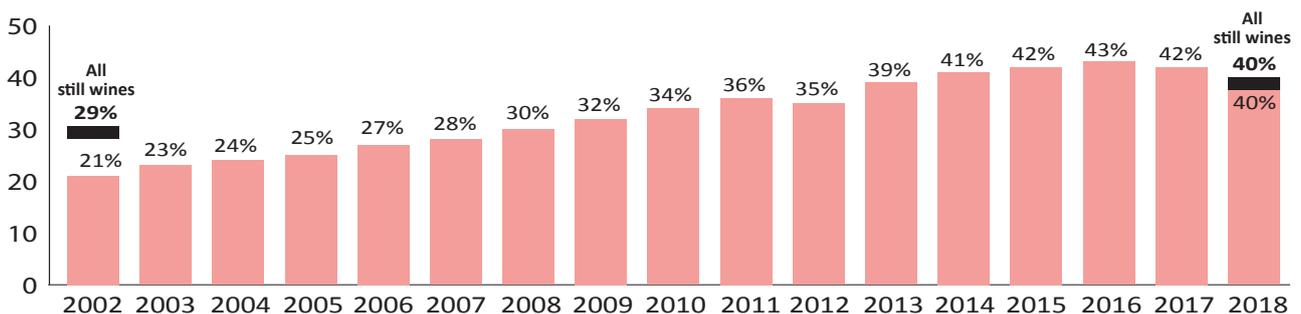
The four main importers of rosé wine are France, Germany, the United Kingdom and the United States. They alone accounted for 62% of import volumes and 55% of values in 2018. The main import country by volume, however, remains France, with 2.8 million hectolitres, an incredible quarter of global imports. By value, the United States imported rosés worth 500 million euros, 22% of global import value thereby strengthening its position as the leading importer country.

Among burgeoning trends observed, Russia saw its share of bulk rosé imports decline sharply in favour of packaged rosé wines.

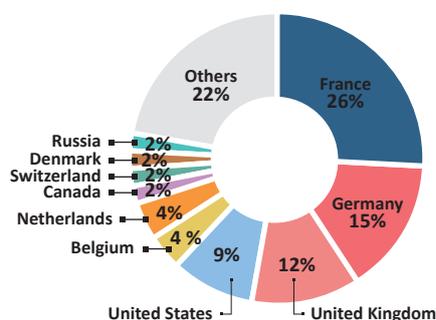
Ultimately, although the three leading importers of rosé wine stayed the same, their ranking slightly changed: Germany is now in second position, replacing the United Kingdom which dropped to third place.

By value, the United States, which ranks first, is followed by the United Kingdom then France, with 14% and 10% market shares respectively.

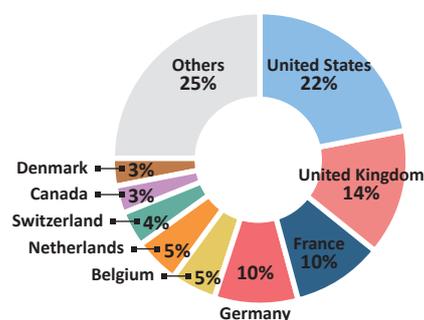
Change in imported rosé wine in global rosé consumption  
(as a % of the total volume consumed)



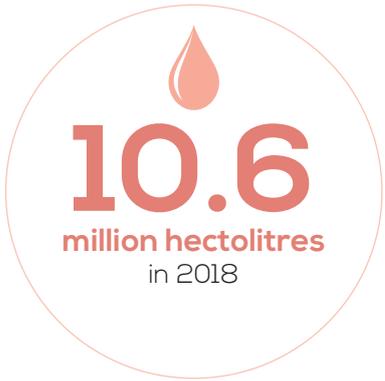
The main importers of rosé wine in 2018  
(as a % of total rosé wine imports by VOLUME)



The main importers of rosé wine in 2018  
(as a % of total rosé wine imports by VALUE)



# Exports



Global rosé exports rose from 7.6 million hectolitres in 2002 to 10.6 million hectolitres in 2018, a rise of 39%. All the leading countries have grown their exports by volume. In value, rosé wines exported in 2018 were worth 2.2 billion euros compared with 2 billion euros in 2017.

As in 2017, **Spain, Italy and France were the leading export countries in 2018**. The three together account for **two thirds of global exports** of rosé wine:

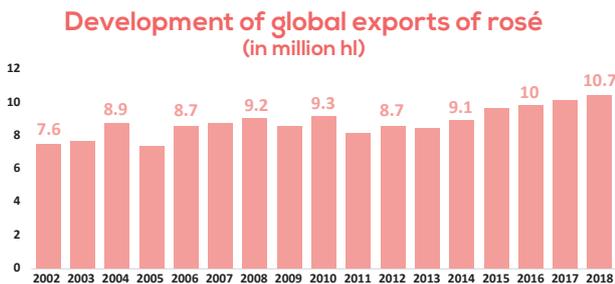
- **Spain**, the world's leading exporter of rosé wine, accounts for **40% of exports by volume!** That is a gain of 12 points in export share by volume since 2008. Most of its volumes are focused on **entry-level wines marketed in bulk**.
- **Italy's** dynamics are the reverse of Spain's. After falling sharply between 2011 and 2013, the country has stagnated since 2015. **The surge in 2017 does not appear to have been confirmed in 2018**. Nevertheless, Italy seems to be moving upmarket.
- **France**, on the other hand, has **gained 4 points in market shares in ten years**, due to the overall increase in its export volumes.

Regarding changes in the **average export price** (customs price, excl. VAT), several comments can be made:

- **France** is the **primary exporter of premium rosé wine**, with an average price of €3.5/75cl bottle (compared with €2.4 in 2014). **Most of these exports are packaged, bottled wines, mainly from Provence**
- **Italy**, where approximately **3/4 of rosé wine exports are packaged, has posted a significant increase in average price**: it rose from €1.7 to 2.3/75cl between 2014 and 2018.

As with imports, the 'export podium' by volume in 2018 changed, though once again featured the same countries. **France, in third position in 2017, outstripped Italy and took second place in 2018**.

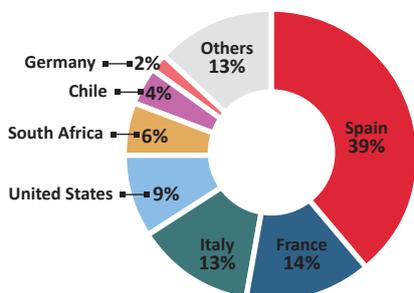
**From a value perspective, France (30% of rosé wine exports) and Italy (20%), are clearly the two countries that dominate exports of rosé wine, with premium wines - combined, they represent half of the global value generated by exports of rosé wine!**



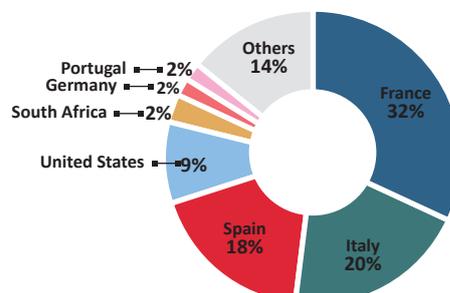
## Volume/value comparison

Most top-end rosé wines come from France. Spain has a strong position at entry-level.

**The main exporters of rosé wine in 2018 (as a % of total rosé wine exports by VOLUME)**



**The main exporters of rosé wine in 2018 (as a % of total rosé wine exports by VALUE)**



# Conclusion

**Global consumption of rosé wine has soared in seventeen years, growing an incredible 40% between 2002 and 2018.** By comparison, consumption of still wine across the 3 colours only progressed by 5% over the same period...

**In 2018, consumption of rosé therefore reached 25.6 million hectolitres. This is the highest level ever registered by the Rosé Wines World Tracking since it was established in 2002.**

From a production perspective, after several years of stability and an all-time production low in 2017, **2018 posted record rosé production of 26.4 million hectolitres, a rise of 31% in just one year (2018/2017)!**

**In value**, global trade was also very dynamic, reaching 2.2 billion euros in 2018. **That's 200 million euros more than in 2017**, an increase of 10% in a year!

**Premium rosé wines come mainly from France** (€3.5/75cl, customs price, excl. VAT). Conversely, **Spain has a strong position at entry-level** (€0.75/75cl, customs price, excl. VAT). **Italy**, on the other hand, has witnessed a decline in volume exports of rosé, **but seen its average price increase** to €2.3/75cl (customs price, excl. VAT).

**All producer countries in the Southern Hemisphere, and in Southern Europe, are net rosé wine exporters. Conversely, Northern countries are net importers. By value, exports of French and Italian rosé wine to the United States dominate.**

**By way of a conclusion, the Rosé Wines World Tracking highlights the continued growth of global rosé wine consumption** shown by 2018 data. Several indicators **posted record highs. France and the United States are clearly the two drivers of the global rosé market. Also, the United States virtually doubled its consumption of rosé wine in the off-trade** (a channel accounting for 80% of consumption in the United States), **in just one year!**

## CONTACTS

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