2025

SUMMARY

DATA 2023

Global consumption of rosé wines continued its downward trend in 2023, mirroring the slowdown in international trade flows, while production increased

ROSÉ WINES WORLD TRACKING

Created in 2002 by the Conseil Interprofessionnel des Vins de Provence (CIVP) and FranceAgriMer, Rosé Wines World Tracking collects, analyzes, and disseminates data on rosé wine production, consumption, and trade worldwide. Covering 45 markets including France, it allows monitoring the developments and trends of a dynamic wine category and supports strategic decision-making.

- Indicators monitored since 2002
- 45 countries studied
- Around twenty experts consulted
- Use of consumer panels
- A unique tool recognized worldwide by professionals

CONSEIL INTERPROFESSIONNEL DES VINS DE PROVENCE

FranceAgriMer

ROSE WINES WORLD TRACKING

CONSUMPTION

In 2023, the global rosé wine market, with 18.5 million hectoliters consumed, continued its downward trend since the 2019 peak; however, it remains more resilient than still wines overall.

While still wines declined by 3.8% per year over the 2019–2023 period, rosés fell by only 1.7%

2023

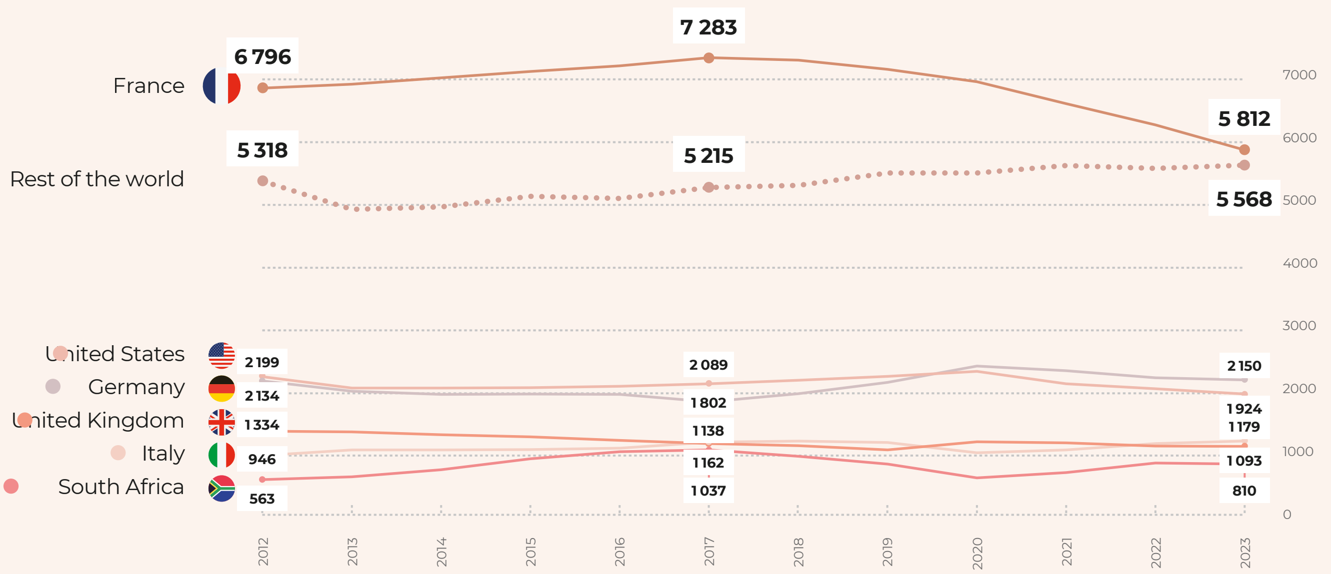
18,5

million hectolitres

Rosé wines are consolidating their position: as in 2022, they represent around 10% of global wine consumption. This share remains relatively stable in France (-0.2 points at 35.1%) but is declining in Belgium (although rosé still accounts for a significant proportion there). Overall, compared with 2012–2014, rosé wines have lost market share in only 5 of the 46 countries studied (among the top 10, the Netherlands, Spain, and Argentina are concerned).

The three largest consumers—France, Germany, and the United States—still dominate with 53% of global volumes, compared with 58% at the beginning of the 2010s. This gradual erosion highlights the emergence of new markets, whether in Central and Eastern Europe (CEE) or more distant regions such as Oceania. Faced with the decline of traditional markets (the top 3, as well as the Netherlands), smaller growth centers are taking over and driving demand, shaping a global landscape in transition, even if this growth is not enough to offset the decline of the major consuming countries.

Global consumption of rosé wines in 2023: France, top 5 foreign markets, and the rest of the world.



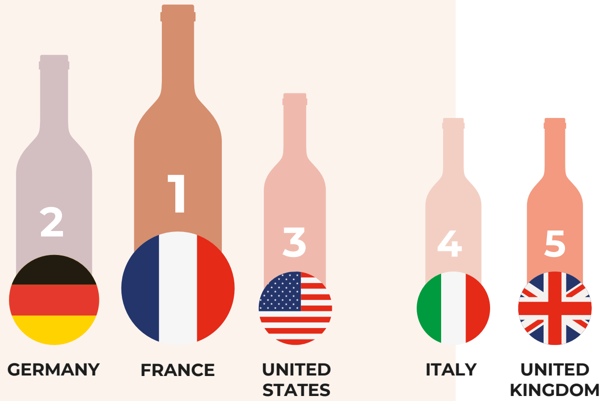
In millions of hectolitres ; source : IWSR

ROSE WINES WORLD TRACKING

CONSUMPTION

Main consumers

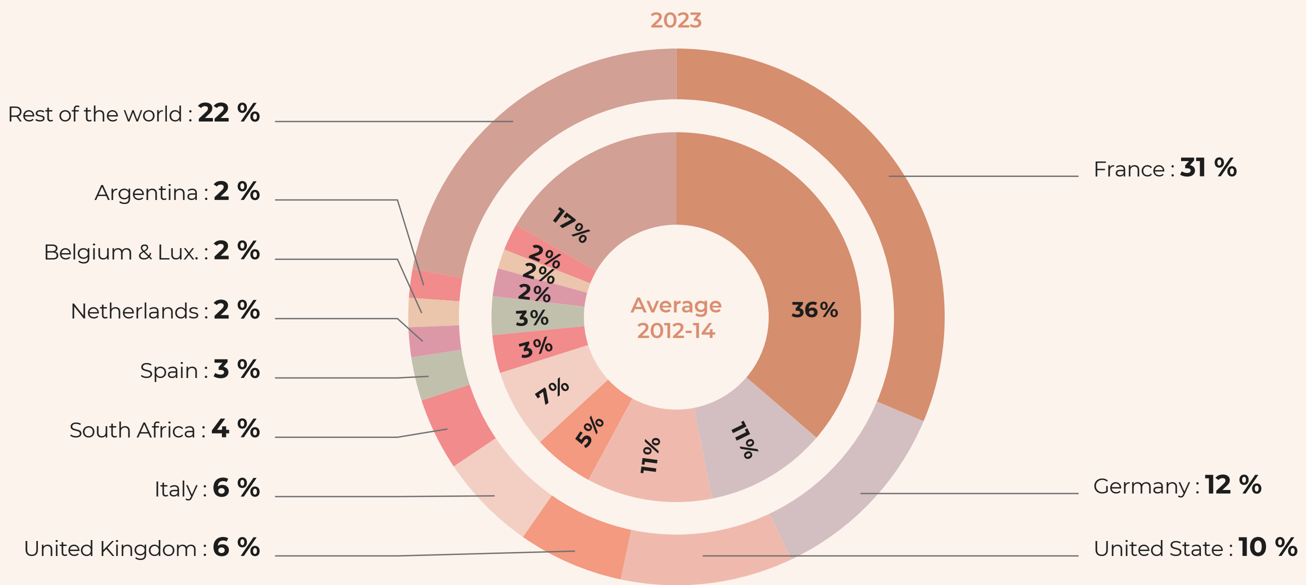
France **once again retains its status as the world's leading** consumer of rosé.



In the United States, this market shift is particularly revealing: overall rosé consumption is decreasing, but it actually conceals two opposing dynamics. On the one hand, "blush"-style rosés have been in structural decline for many years; on the other hand, dry rosés (closer in style to Provence wines) initially experienced rapid growth before recently stabilizing. Added to this is a significant long-term increase in rosé imports, which suggests continuing market opportunities.

Elsewhere, Canada, Italy, and Spain have returned to growth. As shown above (dashed grey curve), the rest of the world outside the Top 10 now accounts for 22% of global rosé consumption, compared with 17% a decade earlier, revealing a dispersion of demand and therefore new growth drivers for rosé wines.

Share of the main consuming countries in global rosé wine consumption.



As a percentage of global consumption of rosé wines (%) ; source : IWSR

ROSE WINES WORLD TRACKING

PRODUCTION

Production rebounded in 2022, reaching 22.5 million hectoliters (+4.1% vs. 2021). In both the short and long term, rosé wine production remains more dynamic than the overall wine category (all colors combined).

Between 2018 and 2022, rosé wine production grew particularly strongly in Spain and France (+3.6% on average per year), and more modestly in Italy and South Africa (+2.8% and +2.5%, respectively).

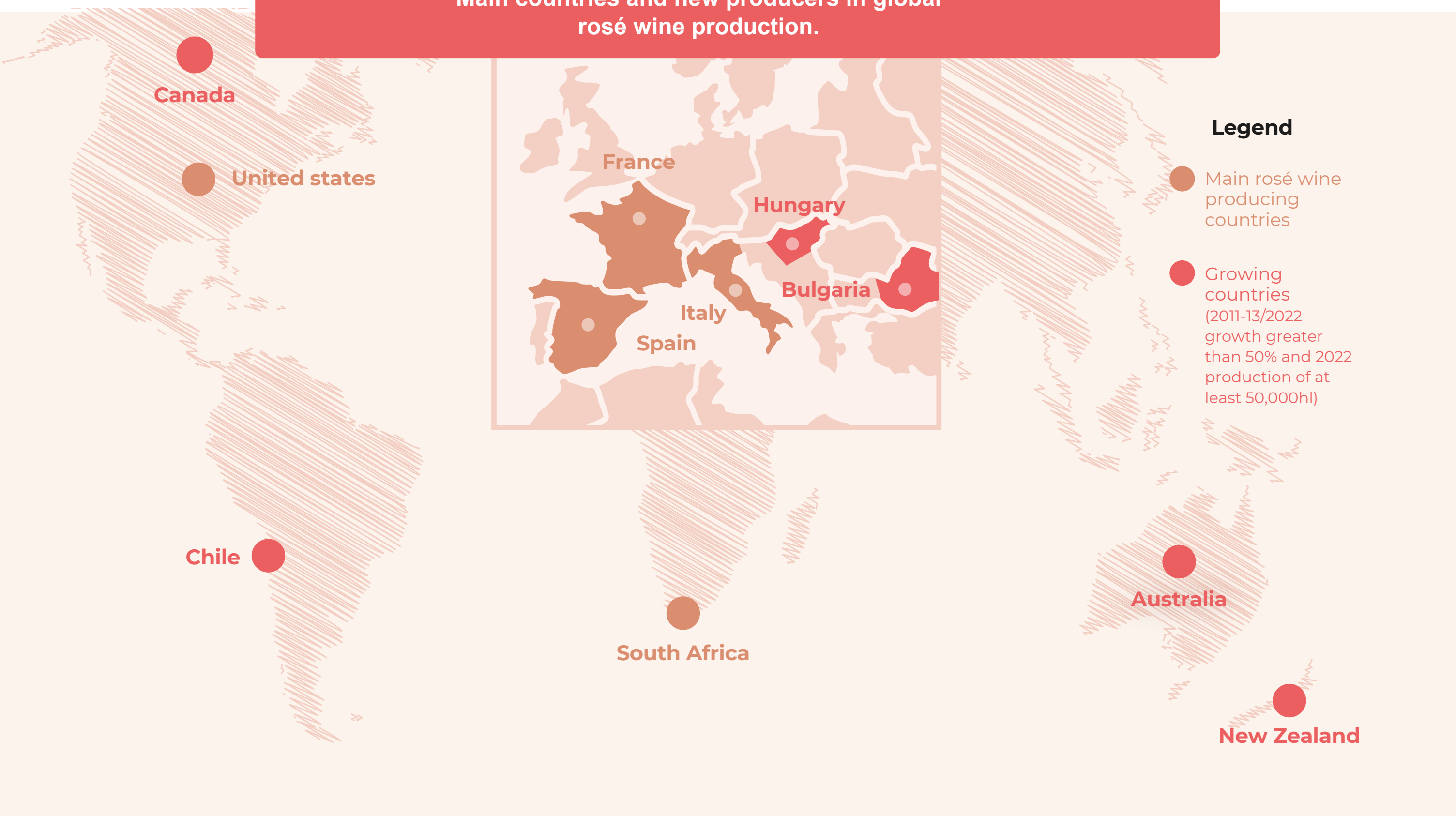
2022 vintage
22,5
million hectolitres

Rosé wine production appears to have stabilized in recent years, representing just under 10% of global wine production. Among the 34 producing countries covered by Rosé Wines World Tracking, rosés gained market share in 25 of them between 2011/13 and 2023. The share of rosés in French production declined to 23.2% in 2022, while it increased in most other major producing countries over the long term (2011–2022), with the exception of the United States.

In volume terms, global rosé wine production rebounded in 2022, reaching 22.5 million hectoliters (+4.1% compared with 2021). In both the short and long term (2011–2022), rosé production has been more dynamic than still wine production overall (+1.8% per year on average for rosés vs. -0.5% for all still wines over 2011–2022). However, production has been fluctuating sharply over the past five years, largely due to France.

Between 2018 and 2022, rosé production increased particularly strongly in Spain and France (+3.6% average annual growth). Italy and South Africa recorded more modest growth (+2.8% and +2.5%). In 2023, France and the five other leading producers

Main countries and new producers in global rosé wine production.

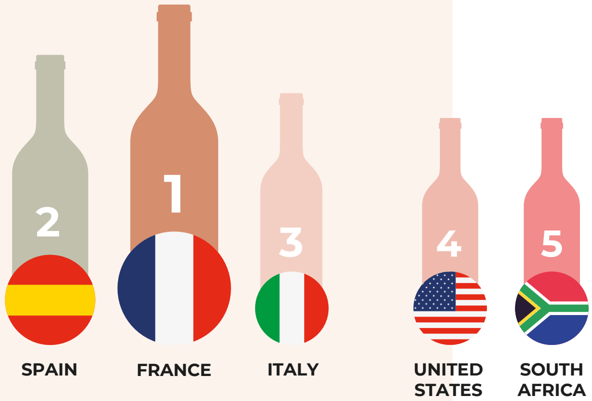


ROSE WINES WORLD TRACKING

PRODUCTION

Main producing countries

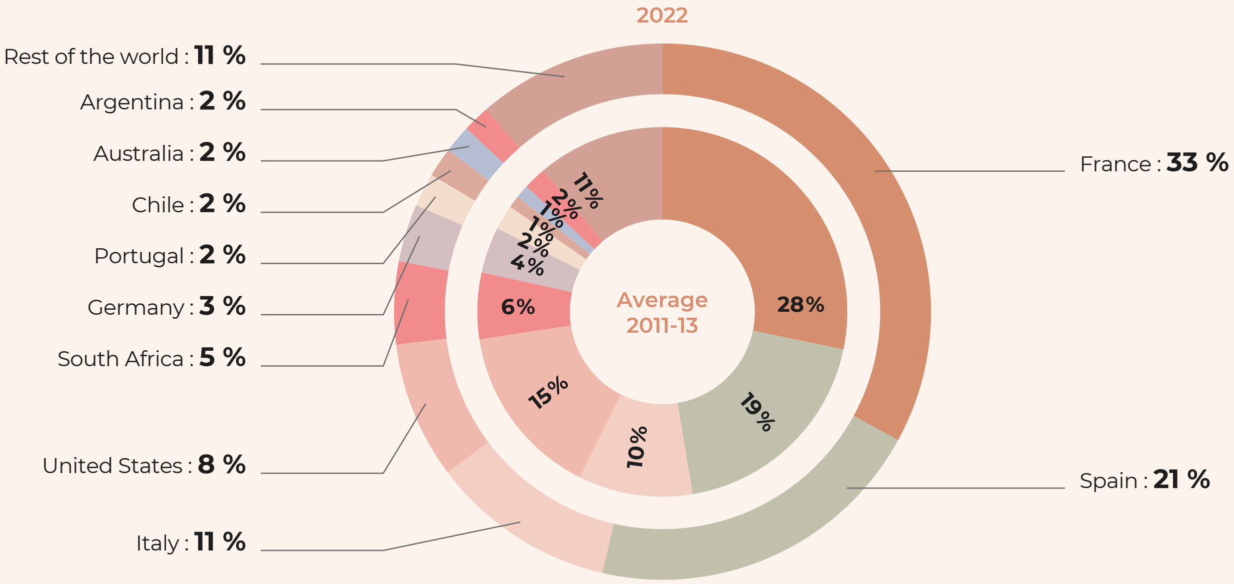
France remains **the world's leading producer** of rosé wine.



accounted for 81% of global production (18.3 million hectoliters). French production rose in the short term (+15% vs. the 2021 vintage), partly due to the weak 2021 harvest. In the United States, rosé wine production has continued to decline over the long term (-4.4% per year on average between 2011 and 2022), most likely due to the fall in blush/White Zinfandel rosés.

Production remains concentrated in Western Europe and the United States. However, countries in the Southern Hemisphere (Chile, New Zealand, Australia), Eastern Europe (Hungary, Bulgaria), and Canada are becoming increasingly dynamic. France remains the world's largest rosé producer (33% of volumes in 2022 vs. 30% in 2021), followed by Spain (21%) and Italy (11%). Over the long term, global production growth has been driven mainly by France (+2.2 Mhl) and Spain (+1.1 Mhl).

Share of the main producing countries in global rosé wine production.



As a percentage of global rosé wine production (%)
Source: IWSR and world extrapolation from OIV-TDM data

ROSE WINES WORLD TRACKING

IMPORTS

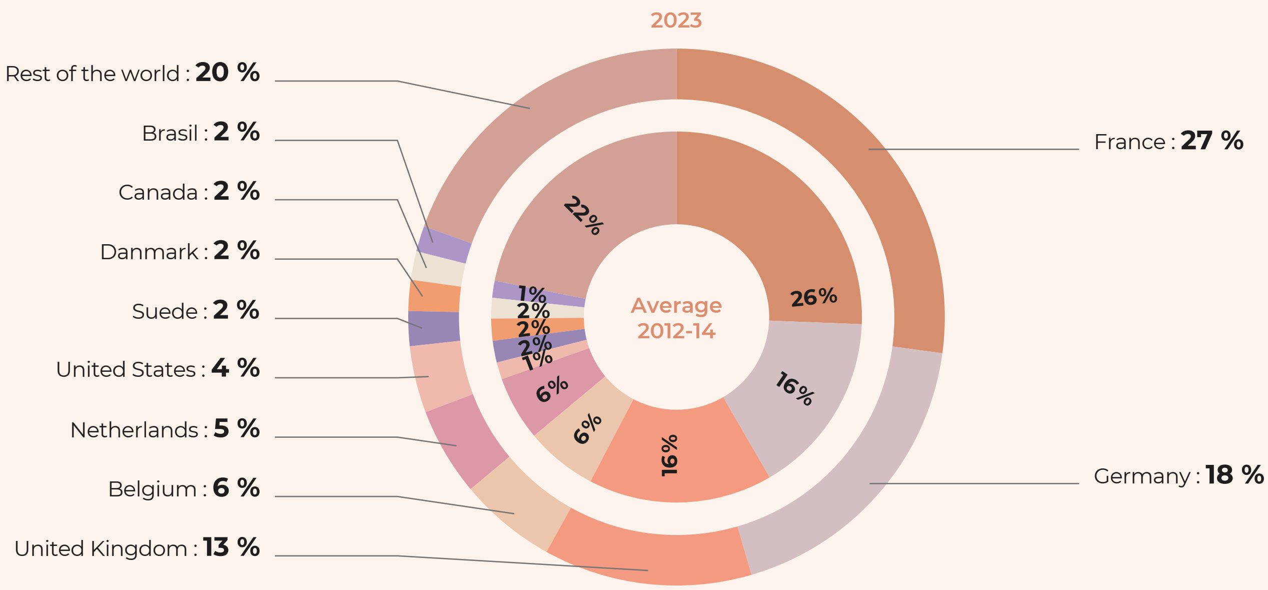
In 2023, about half of the rosé wines consumed worldwide crossed at least one border, a stable share compared with 2022. Rosés accounted for 10.7% of global still wine imports. France remains the top importer by volume, mainly entry-level Spanish rosés, while the United States and Canada import higher-value wines. In value terms, the United Kingdom remains the largest importer (17% of the world total in 2023), ahead of Germany (11%).

Import
9,5
millions hectolitres

In 2023, about half of the rosé wines consumed worldwide crossed at least one border, a figure stable compared with 2022. Rosés continued to gain market share in global import flows, representing just over one-tenth of global still wine imports in 2023 (10.7%).

Global imports of rosé wines have slowed since 2021 (-5%). However, over the long term (2012–2023), they recorded a net increase of +1.6 million hectoliters (+21%). France remains the leading importer of rosé wines by volume. In the long term, imports have risen significantly in the United States (+12.8% on average per year, although they dipped between 2019 and 2020). They also increased in Germany, Belgium, and the Netherlands, but less markedly. The share of imports coming from ‘other countries’ stabilized at around 27% of global rosé imports in 2023. Over the past ten years (2012–2023), rosé imports have grown in most major markets, with the exception of the United Kingdom, where the trend has mirrored that of domestic consumption.

Share of the main exporting countries in global rosé wine exports (by volume)



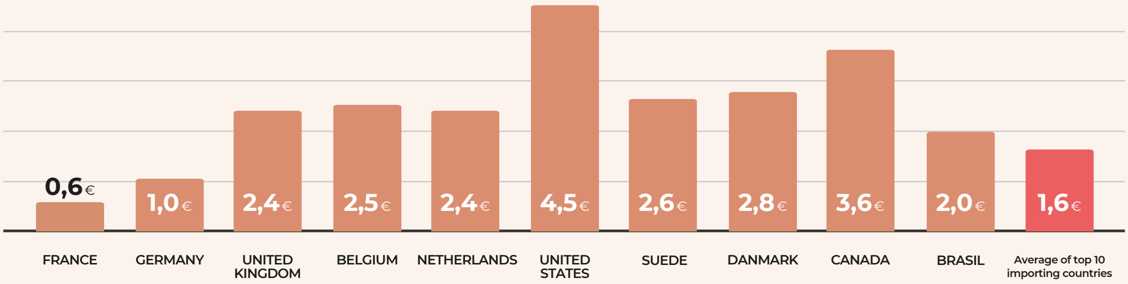
As a percentage of global rosé wine imports by volume (%)
Source: IWSR and world extrapolation from OIV-TDM data

ROSE WINES WORLD TRACKING

IMPORTS

Estimated customs price of imported rosé wines: main importing countries in 2023

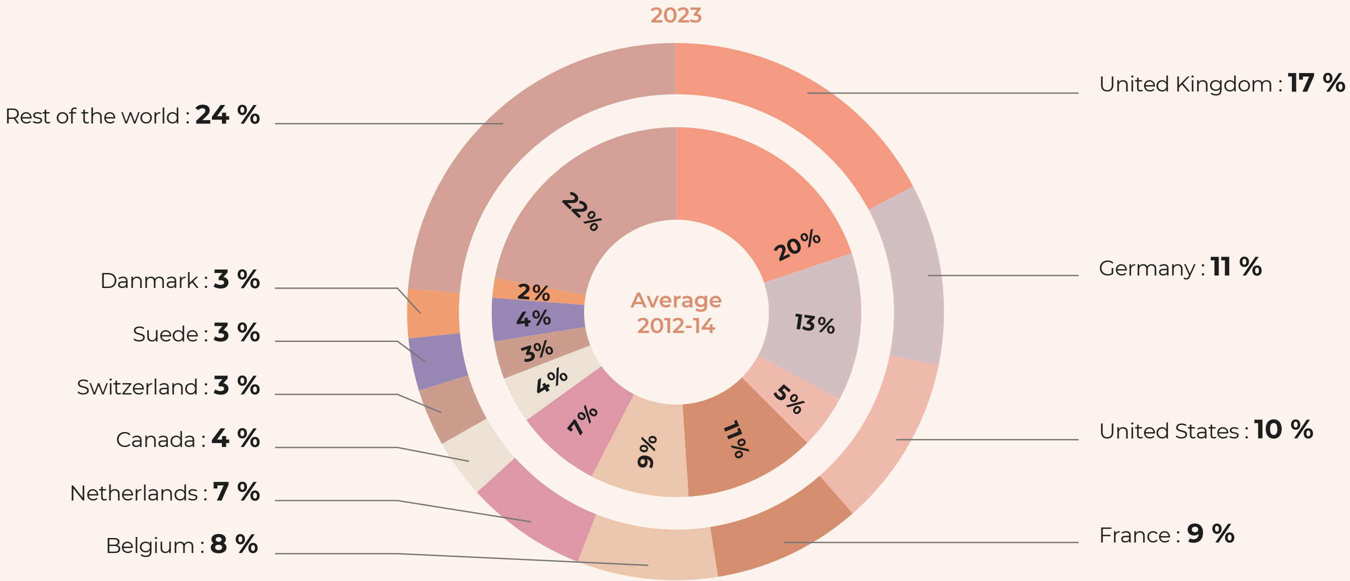
Customs price at departure from the exporting country; in euros per 75cl equivalent bottle.



In 2023, France and Germany were the two main destinations for imported rosé wines by volume, accounting for 27% and 18% of global imports respectively. Price estimates show that rosés imported into France are very low in value (€0.6/75cl), often in bulk (82% of imports). By contrast, rosés imported into the United States (€4.5/75cl) and Canada (€3.6/75cl) are the highest valued. The average price stabilized in 2023, after a sharp increase in 2022.

In value terms, the United Kingdom remained the leading importer (17% of global imports in 2023), ahead of Germany (11%). The shares of these two countries are gradually declining in favor of the United States (+5 points between 2014 and 2023). France accounted for only 9% of global import value in 2023. The global value of imported rosé wines reached €2.2 billion in 2023, a sharp increase over the past decade (compared with €1.3 billion in 2014).

Share of the main exporting countries in global rosé wine exports (by value)



As a percentage of global rosé wine imports in value (%)
Source: IWSR and World extrapolation from OIV-TDM data

ROSE WINES WORLD TRACKING

EXPORTS

Rosé wine exports slowed in 2023. However, they remain dynamic over the long term, with a net increase of +3.2 million hectoliters (+41%) between 2012 and 2023.

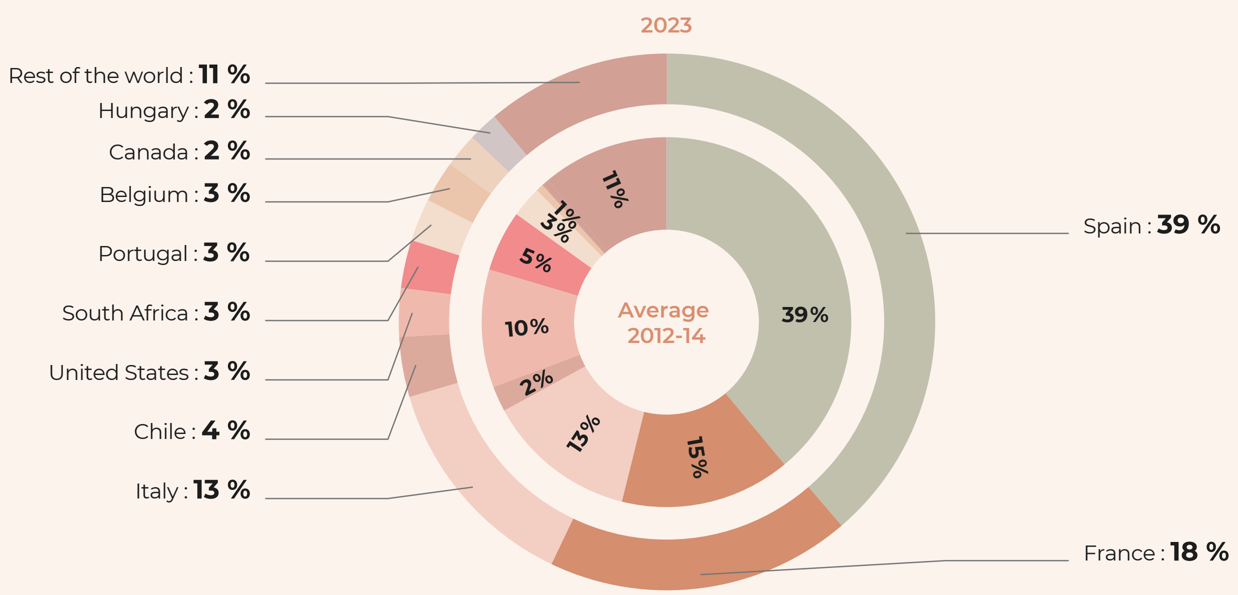
With 4.2 million hectoliters shipped in 2023, Spain remains by far the leading exporter of rosé wines. In the short term, French exports have slowed, while Italy is experiencing positive momentum.

Export
10,8
millions hectolitres

In 2023, rosé wines continued to gain market share in global export flows, representing 12.2% of global still wine exports. In volume terms, although rosé exports slowed in 2022 and 2023, they still showed a significant net gain of +3.2 million hectoliters over 10 years and +800,000 hectoliters over 5 years.

With 4.2 million hectoliters shipped in 2023, Spain remains by far the leading exporter of rosé wines (39% of global export volumes). French exports slowed in the short term, while Italy continued to grow. Between 2012 and 2023, the three main exporting countries (Spain, France, Italy) strengthened their leadership, while the United States and South Africa declined. U.S. rosé exports confirm their structural decrease (-9.5% on average per year).

Share of the main exporting countries in global rosé wine exports (by volume).



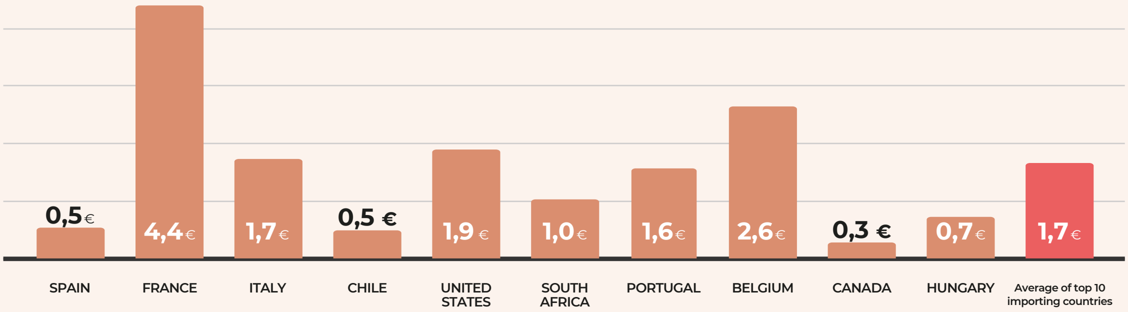
As a percentage of global rosé wine exports by volume (%)
Source: IWSR and World extrapolation from OIV-TDM data

ROSE WINES WORLD TRACKING

EXPORTS

Estimated customs price of exported rosé wines: main exporting countries in 2023

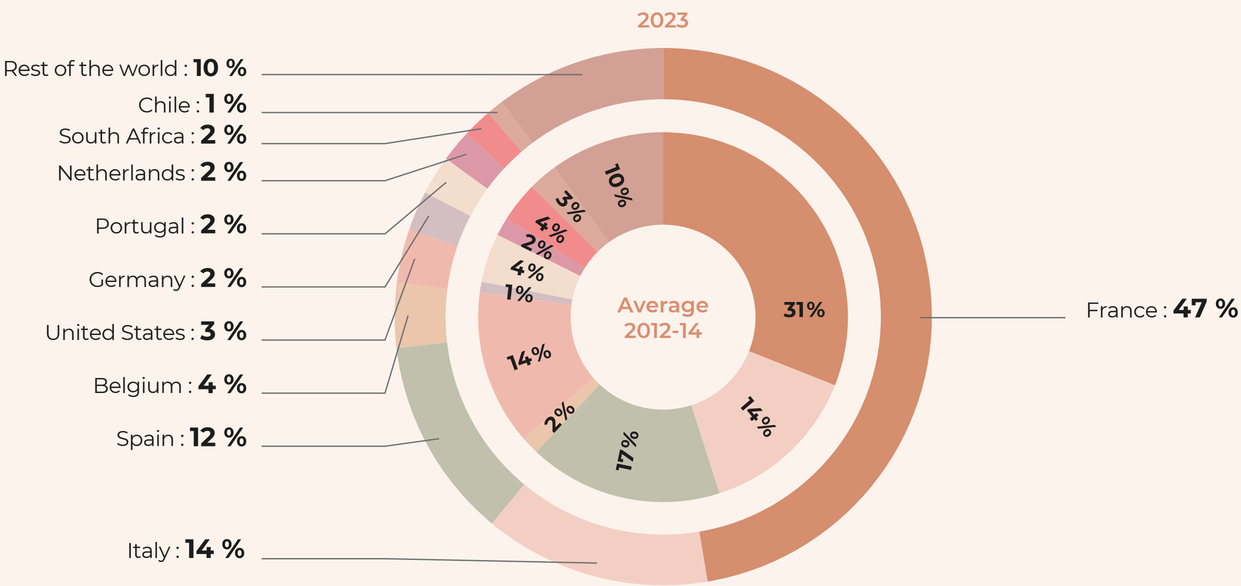
Customs price at departure from the exporting country; in euros per 75cl equivalent bottle.



In terms of price, France remains far ahead, exporting higher-end rosés. Spain, Chile, and Canada are positioned more on entry-level rosés (around €0.4/75cl). Bulk exports account for a much larger share in these countries than in France or Italy. In 2023, the average export price continued to rise for French and American rosés, while remaining more stable for other countries.

In value terms, France confirmed its leadership in 2023, representing 47% of global rosé export value. Italy ranked second (14%), while Spain accounted for only 12% of export value despite its weight in volume. The global value of rosé exports reached €2.5 billion in 2023, nearly double the 2014 level (€1.3 billion). The United States lost market share in value terms (-7 points between 2012–14 and 2023)

Share of the main exporting countries in global rosé wine exports (by value).



As a percentage of global rosé wine exports in value (%)
Source: IWSR and world extrapolation from OIV-TDM data

ROSE WINES WORLD TRACKING

CONCLUSION

The year 2023 confirmed that, after peaking in 2019, global rosé wine consumption has entered a downward trend. This decline is nevertheless more moderate than for still wines overall (-1.7% per year on average for rosés between 2019 and 2023 vs. -3.8% for the category). Consumption remains concentrated in France, Germany, and the United States, although these countries are losing market share to more diffuse growth centers, notably in Central and Eastern Europe and in Oceania. However, in 2023, some major markets such as Italy, Canada, and Spain returned to growth.

Global rosé wine production rebounded in 2022 to reach 22.5 million hectoliters, returning to levels similar to 2018 and 2020. Long-term balances have changed little, with France, Spain, Italy, and the United States accounting for 73% of global production, though regions such as the Southern Hemisphere, Eastern Europe, and Canada are showing growth from smaller bases.

The slowdown in rosé wine imports and exports was confirmed in 2023, marking a decline compared with the 2021 peak. Despite this absolute slowdown in international flows, rosé wines continue to gain market share within global still wine trade. The premiumization of rosés has slowed after two years of strong increases, although the average price of French exports continues to rise.

Despite the structural decline in its domestic consumption, France remains an undisputed leader: the number one producer, number one consumer, number one exporter by value (second by volume), and number one importer by volume (mainly entry-level Spanish rosés). It is also worth noting that in 2023, the United States appears to have shifted from a net exporter to a net importer of rosé wines, as falling exports and declining domestic production were no longer sufficient to meet internal demand.

2025
SUMMARY
DATA 2023

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Source : The IWSR