

JUNE 2024

# SUMMARY

2022 DATA

Global consumption of rosé wine seems to have stabilized in 2022. While rosé wine production has slipped again, international flows are enjoying stability and upgraded status.

## ROSE WINES WORLD TRACKING

Created in 2002 by the CIVP (Conseil Interprofessionnel des Vins de Provence) and FranceAgriMer, Rosé Wines World Tracking compiles, analyses and publishes data on the production, consumption and trading of rosé wine around the world. Covering 45 markets including France, it tracks trends and changes in a booming category of wine and offers insights for strategic decision-making:

- Indicators tracked since 2002
- 45 countries studied
- 20+ experts consulted
- Use of consumer focus groups
- A one-of-a-kind tool recognized by industry professionals.

**CIVP**

CONSEIL INTERPROFESSIONNEL  
DES VINS DE PROVENCE



FranceAgriMer



## ROSE WINES WORLD TRACKING

# CONSUMPTION

In 2022, after a decade of rising proportions of rosé out of total global wine consumption, now 1 in every 10 bottles of wine consumed around the world are bottles of rosé.

And in France, rosé accounts for 1 in 3 bottles consumed (37% of still wine consumption). It is the only country in the world with such a high proportion of rosé.

in 2022  
**19,6**  
million  
hectolitres



Over the past 10 years, although rosé consumption increased on the whole, peaking at 20 million hectolitres in 2019, it declined in 2020 and 2021 before experiencing a slight upturn in 2022, ending at 19.6 million hectolitres.

In both the long and medium terms, **rosé outperforms the overall category of still wine** (total red, rosé and white wine combined).

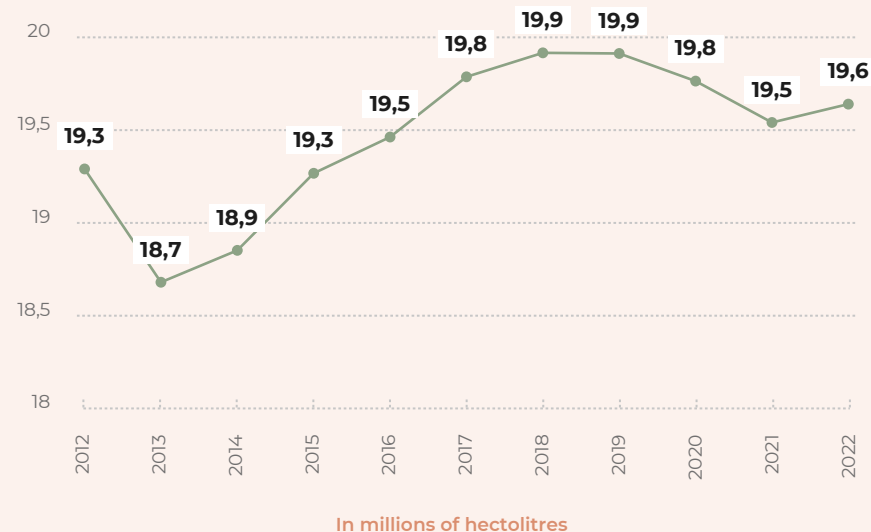
Between 2012 and 2022, rosé made significant headway in a category that declined by 11% across all the colours. Between 2019 and 2022, rosé was on a downward trend, but less sharply than the still wine category in general. In addition, the volume of rosé consumed returned to positive

growth in 2022 (up 0.5%) at a time when total still wine fell by around 2.6%.

**The main areas where rosé wine is consumed can be found primarily in Western Europe (16 countries) and the United States.** These two regions account for 78% of global rosé wine consumption (80% in 2021 and 83% in 2012).

In 2022, **the consumption of rosé wine decreased across almost all the main markets.** The pace of this decline is slowing in France and the United States but is speeding up in Germany and the United Kingdom. **Growth in foreign markets (outside the top five) accelerated between 2021 and 2022.**

Global rosé wine consumption (by volume)



Source: IWSR



## ROSE WINES WORLD TRACKING

# CONSUMPTION



### TOP COUNTRIES FOR ROSE CONSUMPTION

This year again, France was the world's biggest consumer of rosé wine.



**These three countries account for more than half of all rosé consumption worldwide.**

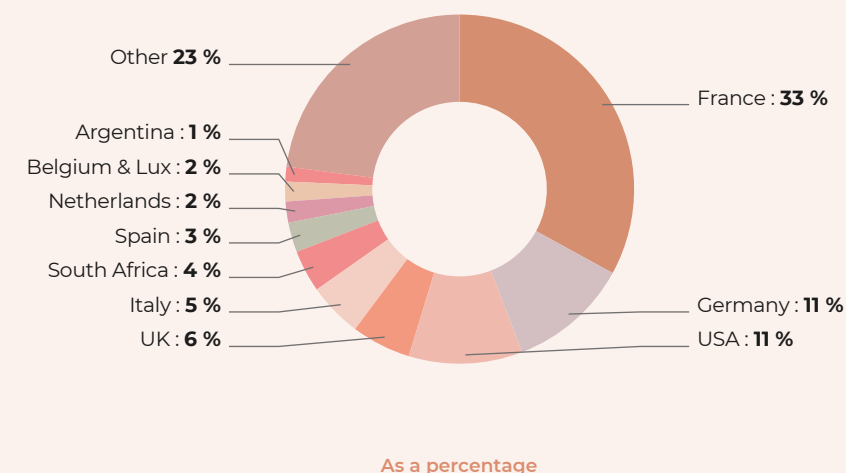
While they have dominated the rankings in recent years, the rest of the world (outside the top ten) continues to gain ground: in 2022, those areas were responsible for 23% of global rosé wine consumption, compared to 21% in 2021 and 17% in 2012. **Worldwide rosé wine consumption is on the rise by volume thanks to a growing number of "secondary" countries.**

In 2020, Germany surpassed the United States, which had been the second biggest worldwide consumer of rosé since the 2010s, although their numbers remain very close.

**In a context of diminishing global consumption of still wines, rosés have been fairly stable.** In Western Europe, rosé serves as a buffer for the general decline in wine consumption while, in Asia-Oceania and Central and Eastern Europe, rosé is a driver of growth.

Multiple areas (Central and Eastern Europe, Oceania, Brazil, Mexico and Denmark) have concerned their status as growth engines. In 2022, a negative shift in trends was observed in many European countries. For other countries (particularly France, Italy and the United States), the drop in the consumption of rosé continued in 2022.

Share of the biggest rosé-consuming countries out of global rosé wine consumption



Source: IWSR



## ROSE WINES WORLD TRACKING \_\_\_\_ PRODUCTION

Over the last decade, the market share of rosé wines has risen.

For the 2021 vintage, this growth seems to have subsided to 9.5% of global still wine production.

2021  
vintage  
**21,8**  
million  
hectolitres



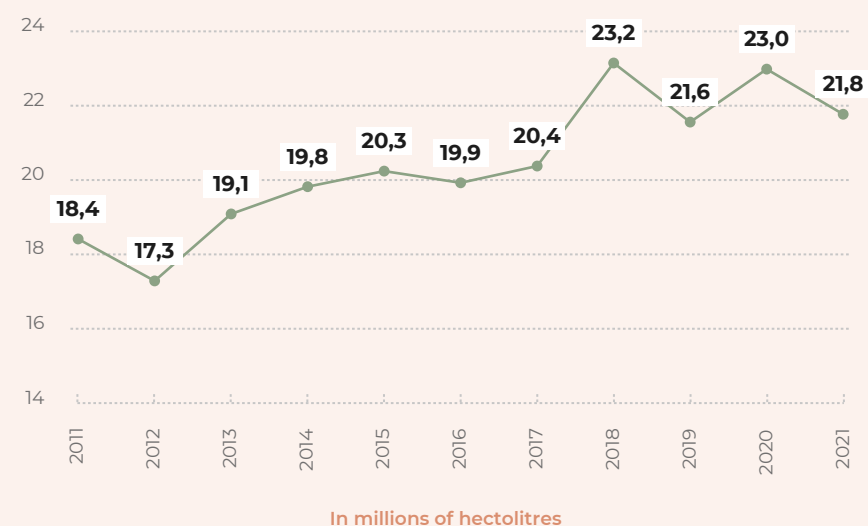
Between 2011 and 2021, global rosé wine production increased by an annual average of 1.7%. At the same time, the global production of still wines decreased by 0.5% per year. In 2021, the trend appeared to have reversed with global rosé production falling more sharply than still wine production as a whole.

Of the 34 rosé-producing countries covered by Rosé Wines World Tracking, rosé's market share rose in 23 countries and dropped in 10. Over the past decade, the proportion of rosé out of total still wine production expanded continuously in France (up 12% in 10 years, attaining 25% in 2021).

In the short term, there has been a very dramatic slump in France (down 20% compared to 2020), which can mainly be attributed to unfavourable conditions. In the longer term, between 2011 and 2021, the production of rosé wine advanced in Spain, South Africa, France and Italy (by an annual average of 4%, 3%, 3% and 2% respectively).

Outside France, over the past decade, the rosé production is trending downwards in Germany and the United States (due in particular to a decline in blush and white zin rosés).

Global production of still rosés (by volume)



Source: IWSR



## ROSE WINES WORLD TRACKING \_\_\_\_ PRODUCTION



### TOP COUNTRIES FOR ROSE PRODUCTION

France is still the world's biggest producer and consumer of rosé wines by far.



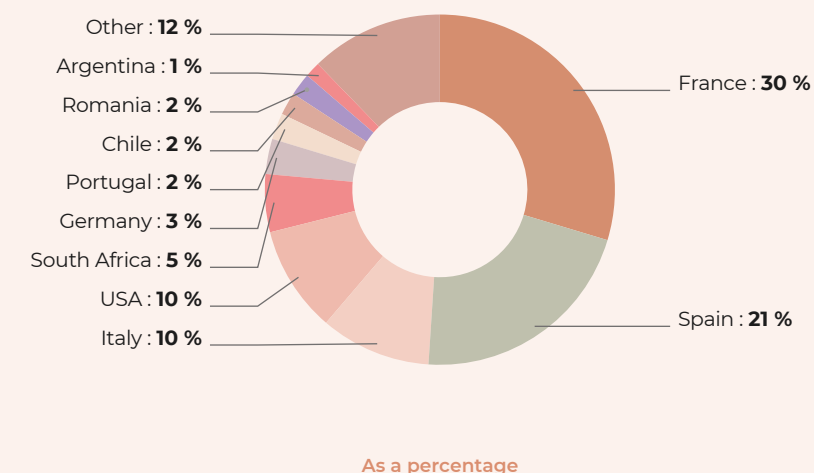
As in the previous edition of this analysis, Rosé Wines World Tracking has identified "new" rosé-producing countries.

On the whole, countries in the Southern Hemisphere (Chile and New Zealand), Eastern Europe (Hungary, Romania and Bulgaria) and Canada have proved to be dynamic.

Between 2011 and 2021, rosé wine production grew in most of the main countries. Some countries recorded significant gains from lower base-lines (New Zealand, Bulgaria and Hungary).

France is still the world's biggest producer and consumer of rosé wines by far.

Share of the biggest rosé-producing countries out of global rosé wine production



Source: IWSR



## ROSE WINES WORLD TRACKING

# IMPORTS

Like in 2021, about half of the rosé that is consumed worldwide crossed at least one border.



**Rosé accounts for a tenth of all still wine imports around the world.** By volume, global rosé imports stabilized in 2022. Over the long term (2012-2022), they experienced a net gain of 2 million hectolitres (up 26%). **In this context, France remains the world's biggest importer of rosé wines. The stabilization that was observed in 2021 continued in 2022.**

**Amongst the top importers over the decade, the numbers for France, Germany and Belgium all increased.** Conversely, the United Kingdom was the only country in the top ten to see its rosé imports decrease: the trend in imports by that country followed the trend in its consumption (a downward trend through 2019 before bouncing

back in 2020, following by a new decline in 2021 and 2022).

In terms of value, the ranking for 2022 is similar to 2021. **The United Kingdom remains the top importer by value** (with 18% of global imports), ahead of Germany. The proportion of imports by those two countries however seems to be shrinking in favour of the **United States (up 5% between 2014 and 2022).**

On average, **rosé imports in France were very low-value** (at €0.60/750 ml). On the opposite end of the spectrum, the rosés imported into the United States, Canada and Switzerland tend to be the most highly valued (at over €3/750 ml).

### TOP COUNTRIES FOR ROSE IMPORTS

While France is the biggest importer by volume, the United Kingdom takes the gold for imports by value



Source: IWSR



## ROSE WINES WORLD TRACKING

# EXPORTS

In 2022, rosé continued to gain market share in exports flows of still wine (all colours combined).

**By volume, rosé wine exports spiked**, with net gains of 3.4 million hectolitres since 2021 (up 46%). On the whole, **this ranking did not change much compared to 2021.** Spain's numbers dropped significantly (to 38% from 40% in 2021), although it is still the biggest exporter of rosé by far. France came in second, holding stable at 18%, ahead of Italy and the United States.

**France's exports continued to grow substantially, in a linear trend over the past decade**, at an annual rate of 6.7% on average, just like Italy. Conversely, rosé exports by the **United States have been on the decline** since 2014, a trend that has only accelerated since 2020, **hand in hand with a drop in global demand for blush rosés in favour of dryer rosés like those made in Provence.**

**Between 2012 and 2022, those three biggest exporters reinforced their leadership positions.** At the same time, figures for the United States have shrunk (from lower baselines).

**By value, as it did in 2021, France came in at the top of the rankings**, exporting more high-end rosés than the other countries. Spain, Chile and Canada are chiefly positioned on entry-level rosés (at around €0.40/750 ml). **Generally speaking, the average price of exports increased in 2022, a trend that was especially pronounced amongst French rosés.**

There were no noteworthy changes compared to 2021. **France confirmed its status as a leader, with 46% of global exports of rosé wines.** In 2022, Spain only accounted for 12% of those flows, although still 38% by volume.

### TOP COUNTRIES FOR ROSE EXPORTS

While Spain was the biggest exporter by volume, France retained its leadership position in rosé exports by value



Source: IWSR





# ROSE WINES WORLD TRACKING

## CONCLUSION

**Global consumption of rosé wine seems to have stabilized in 2022. While rosé wine production has slipped again, international flows are enjoying stability and upgraded status.**

After a downward phase between 2019 and 2021, **rosé wine consumption stabilized in 2022** (at 19.6 million hectolitres, up 0.5% over 2021). Rosé continued to gain market share. Although its consumption has stabilized, the total consumption of still wine continued to shrink (down 2.6% in 2022). **Rosé wine now accounts for 10% of global still wine consumption.**

The main areas where rosé wine is consumed can be found primarily in Western Europe (16 countries) and the United States. That being said, the market share enjoyed by those two regions has declined: they were responsible for 83% of global rosé consumption in 2012, compared to 80% in 2021 and 78% in 2022.

The growth areas continue to become more and more spread out. Several pre-existing trends have been confirmed, namely:

- **A drop in rosé wine consumption in mature, high-volume markets** (like France, the United States and Italy)
- **In parallel, small to mid-sized growth areas remain** (particularly Central and Eastern Europe, Denmark, Oceania and Brazil)
- A return to growth in certain markets in 2022 (like
- Canada, Spain, Greece, Portugal and South Africa).

**Global rosé production shifted downwards again**, to 21.8 million hectolitres in 2021 (-5.3%).

That decrease was mainly due to France (-1.6 million hectolitres in 2021), although it continues to dominate global production alongside Spain, Italy and the United States:

- Those four countries alone accounted for 71% of global rosé wine production
- In parallel, several areas made positive progress: in the Southern Hemisphere (Chile and New Zealand), Eastern Europe (Hungary, Romania and Bulgaria) and Canada.

**In 2022, global trade flows were relatively stable. About half of all rosés cross at least one national border before being consumed.** Global exports held steady at 10.9 million hectolitres in 2022. Spain is still the top exporter (38% by volume), ahead of France (18% by volume).

**Exported rosés are becoming more high-end.**

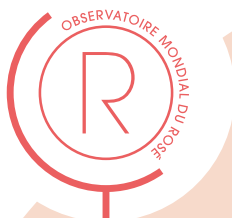
Global export sales (export prices) rose to €2.4 billion (up €0.3 billion compared to 2021). **By value, the leadership position of French rosés was strengthened, with high average prices enjoying an upward trend.**

**In spite of a fall in production (most likely due to cyclical circumstances) and domestic consumption (a structural decline), France remains a key leader in the world of rosé wine**, as the no. 1 producer, no. 1 consumer, no. 1 exporter by value (no. 2 behind Spain by volume) and no. 1 importer by volume (primarily from Spain).

### CONTACT

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