June 2023

Summary

Key figures 2021

Consumption increases over the long term, but declines over the years impacted by the covid crisis

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 45 key countries, including France. This enables us to follow market trends and developments across the globe to help with strategic decision-making.

- 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

Production

Similar to consumption, rosé's market share in terms of still wine production has been on the rise since 2013, amounting now to 1 in 10 bottles.

23
million hectolitres
(vintage 2020)

In **France**, the proportion of rosé that is produced has grown substantially thanks to multiple regions opting to focus on that colour of wine, in a fairly linear trend over the past decade.

Outside **France**, this tracking observatory has identified "new" rosé wine-making countries. These are characterized by more than 50% growth in the space of 10 years, with at least 50,000 hectolitres produced annually. The countries named by this analysis were:

- **Chile**
- **New Zealand**
- **Hungary**
- **Romania**
- **Bulgaria.**

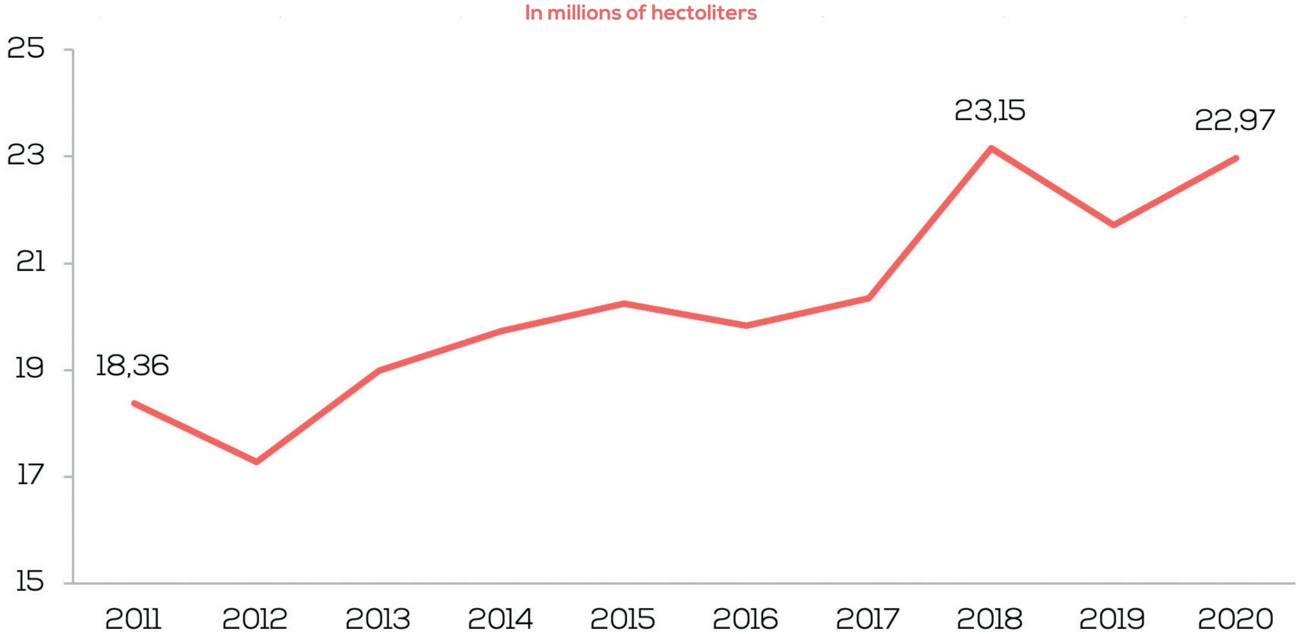
In terms of product volume, 2018 witnessed an extraordinary harvest, while 2019 saw a decline in rosé production figures. The 2020 harvest then bounced back with volumes similar to 2018.

Over the past 10 years, worldwide rosé wine production has been climbing.

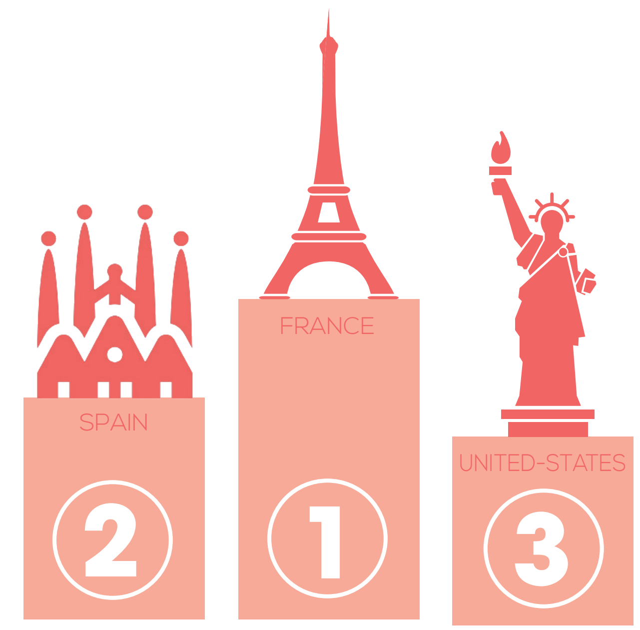
The main rosé-making countries were the same as in 2019, in the same order, with the following three at the top of the list:

- **France**
- **Spain**
- **USA.**

World production of rosé wines (in volume)
In millions of hectoliters



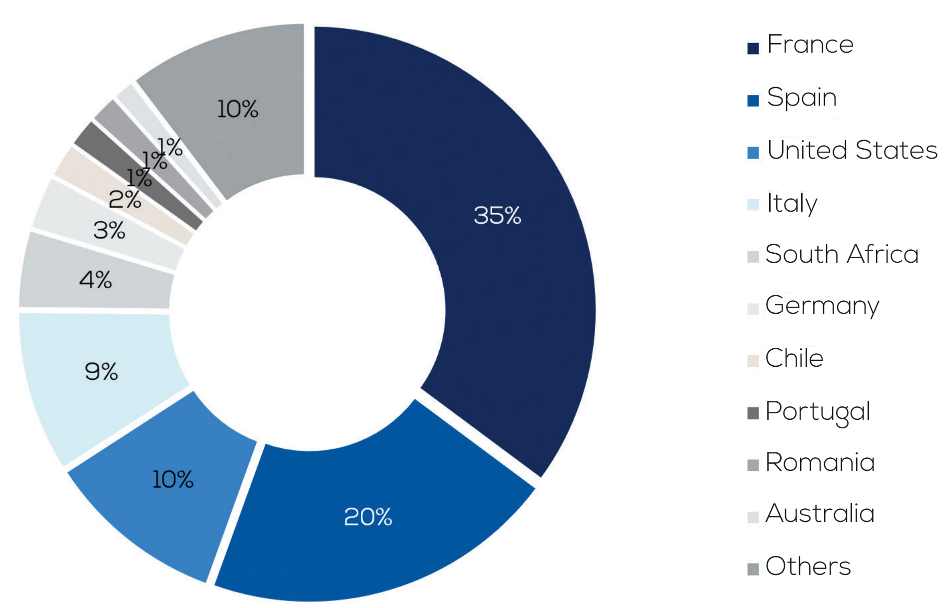
Sources : IWSR Wine Intelligence



France further bolstered its leadership position this year with more than 1/3 of global rosé production.

Unlike consumptions, whose outlets have somewhat diversified, global production is becoming increasingly concentrated, with **France** and **Spain** producing more than half of the world's rosé.
Other main producers include the **United States**, although its volume is on the decline, and **Italy**, whose production has been expanding over the last decade.

Share of the main producing countries in the world production of rosé wines
As a percentage of world rosé wine production (%)



Sources : IWSR Wine Intelligence

Consumption

Approximately 1 in 10 bottles of wine consumed worldwide is a bottle of rosé. This pattern, which was originally observed several years ago, only grew stronger in 2021.
And in France, the only country in the world to consume so much rosé, that number is 1 in 3 bottles.

19.5
million hectolitres
in 2021

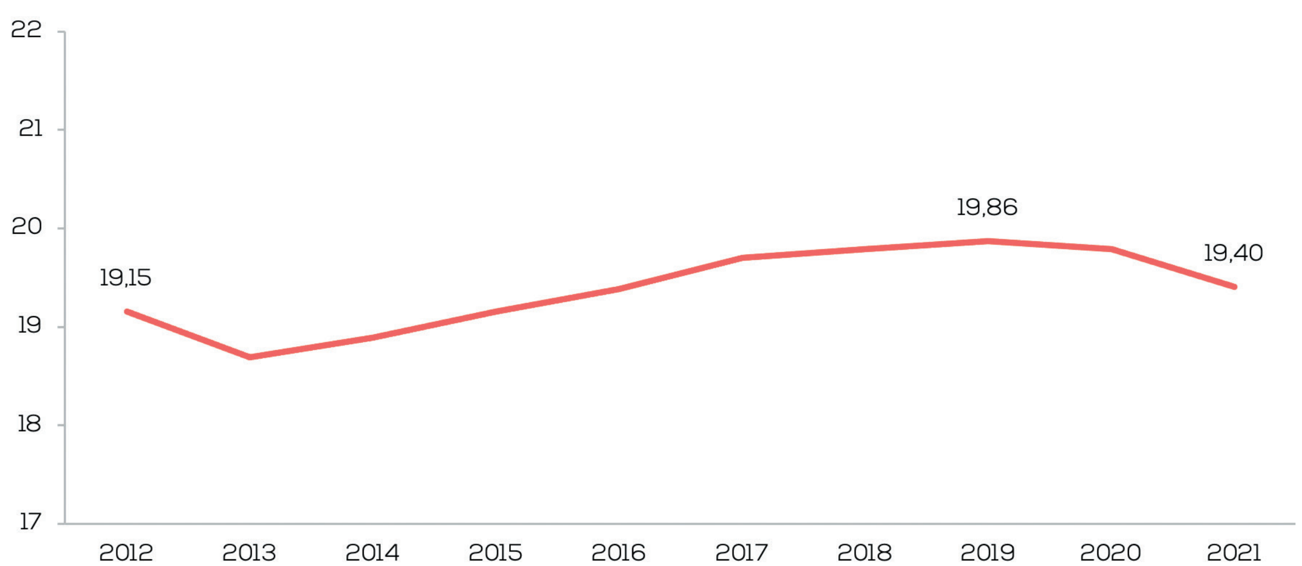
Over the past 10 years, although rosé consumption increased on the whole, peaking at 20 million hectolitres in 2019, it declined in 2020 and 2021, with figures below 19.5 million hectolitres.

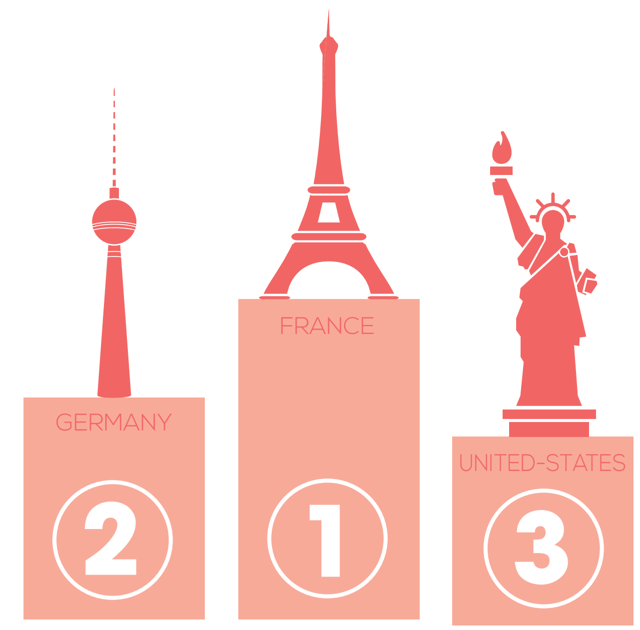
2020 and 2021 were hit hard by the pandemic and the repeated shutdowns of restaurants, leading to a downturn in global rosé wine consumption. Other cyclical circumstances, like weather, and structural factors, like the shrinking appeal of sweet rosés, further reinforced that drop.
It is however worth noting that this decrease in quantities consumed was smaller for rosé than for wine in general. As a result, in view of the unique context of these past two years, it cannot be said with certainty that the dip in rosé wine consumption is a serious trend.

Nonetheless, rosé consumption actually rose in certain countries during the COVID years, particularly in a number of countries in **Central and Eastern Europe** and **Asia-Oceania**.

Far and away the leader of rosé consumer countries, France retained its number one position in 2021, at around 6.5 million hectolitres, or 34% of global rosé consumption.

World consumption of rosé wines (in volume)
In millions of hectoliters





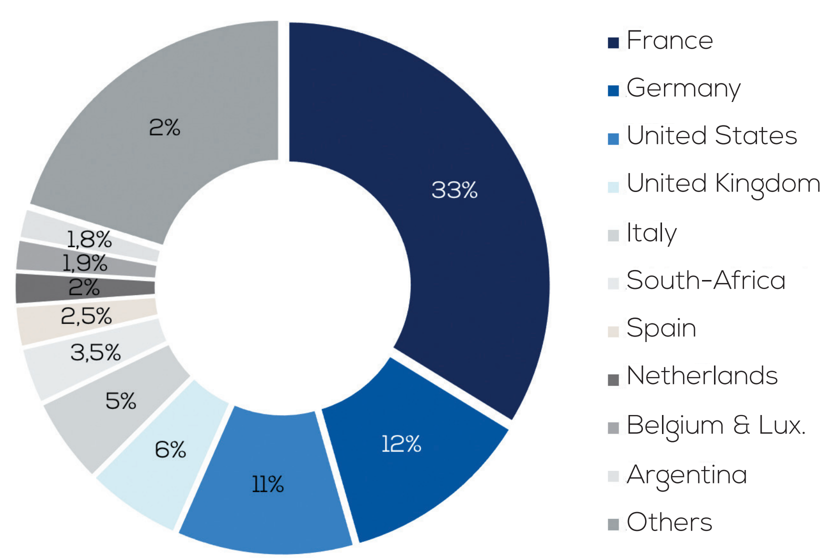
The top three rosé consuming countries in 2021 were (in order):
- **France**
- **Germany**
- **USA.**

While these three countries already dominated previous rankings, there has been a notable diversification of outlets for rosé, meaning that the relative proportion of rosé consumed in other countries is on the rise.

In 2020 and 2021, **Germany** surpassed the **United States**, which had been the second biggest worldwide consumer of rosé since 2010, although their numbers remained very close.

All in all, these three main countries account for 60% of global rosé consumption.

Share of the main consumer countries in the world consumption of rosé wines
As a percentage of world rosé wine consumption (%)



SUMMARY
Global rosé production continues to increase while consumption stagnates. The difference in 2021 was 3 million hectolitres more rosé produced than consumed.
It should be noted that this production surplus has been observed since 2019, before the start of the pandemic. This tendency has various possible explanations, such as safety stocks on the rise, unsold inventory or industrial uses of wine that are not taken into account by our tracking.
This cross-analysis identified countries that are net producers and others that are net consumers. For example, Germany, the United Kingdom, the Netherlands and Belgium are net consumers, meaning they consume more than they produce. Conversely, Spain, France and Italy are net producers, making more rosé than they consume.

12
million hectolitres
in 2021

International rosé wines trade

Imports

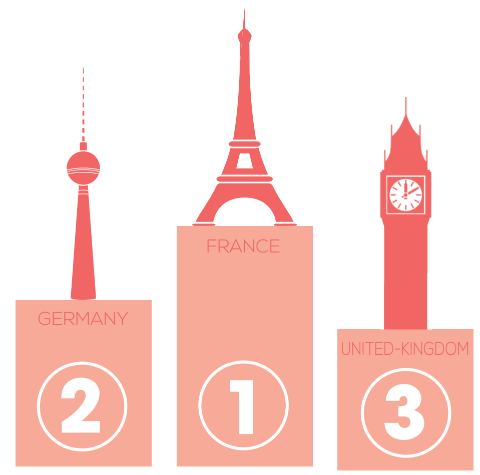
In 2021, more than half of all rosé wine crossed a national border before being consumed.

In other words, the almost uninterrupted growth in imports over the last decade has endured. in fact, they have increased by an average of 2.8% each year since 2011.

The top three import countries are:
• **France**
• **Germany**
• **United Kingdom.**

Of these main importers, it is worth noting that imports of French rosés have fallen since 2017, a record-breaking year. In parallel, over the past two years, imports from **Germany**, **Belgium** and the **Netherlands** have risen.

All the other rosé-making countries around the world have also seen their import levels grow. This is a sign of true diversification amongst imports worldwide.



France, **Germany** and the **United Kingdom** combined account for more than half of all rosé imports, just as they did 10 years back.

The **United States**, as the sixth biggest importer of rosé, imports 4% of the world's rosé, whereas they only imported 2% a decade ago.

In terms of value, the main import countries by volume in 2021 – the **United States** (6th in volume) and **Canada** (9th in volume) – are also the countries that import the biggest quantities of highly valued rosé (€3.50/75 cl wholesale winery price ex-VAT for the US and €3.20 for Canada), followed by **Denmark** and **Sweden** (tied for 8th place in volume). Conversely, **France** (no. 1 in volume) and **Italy** (no. 10 in volume) tend to import entry-level rosé at average prices around €0.50/75 cl ex-VAT.

Exports

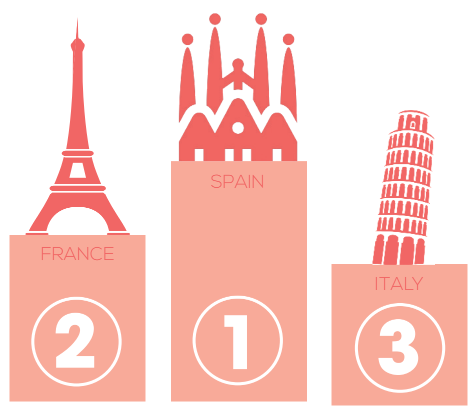
Spain is still – and by far – the world's biggest rosé exporter, with more than double the figures of **France,** the no. 2 exporter.

France's exports have grown in a pronounced, linear fashion over the past 10 years.

Italy, whose exports stagnated between 2010 and 2018, is now enjoying a fairly strong revival, following **France**'s growth curve over the past four years, which raised it into third position as an export country in 2021.

In opposition to this, rosé exports from the **United States** have continuously declined since 2015, with an acceleration of this trend in 2021.

As a result, the three main rosé exporters by volume are:
• **Spain**
• **France**
• **Italy.**



These three countries alone account for nearly 3/4 of all exports, a proportion that has remained stable over the last decade.

In respect of value, **France**, **Belgium** and the **Netherlands** are the most highly valued exporters. **Spain**, **Chile** and **South Africa** are, on the other end of the spectrum, exporters of lower value rosés, with a non-negligible proportion of bulk wine.

With 45% of worldwide rosé exports by value, **France** largely dominates this global ranking, a position that is only growing stronger. It is followed by **Italy**, **Spain** and the **United States**, which have tripled in value.

SUMMARY

A comparison of imports and exports allowed us to identify net import countries (that import more rosé than they export) and net export countries (that export more rosé than they import).

For example, Germany, the United Kingdom, the Netherlands and Belgium are net importers, meaning they import much more rosé wine than they export, while Spain, France and Italy are net exporters.

By cross-referencing import and export flows in the main countries, we can see that:
- **Exports of Spanish rosés to France constitute the biggest import/export flow worldwide (2.4 million hectolitres, or 23% of global rosé exports)**
- **Shipments from Spain to Germany are the number 2 flow of rosé (719,000 hectolitres, or 7% of global rosé exports)**
- **Exports from the US to the UK came in third (438,000 hectolitres, or 4% of global rosé exports).**

On the whole, the 10 biggest rosé import/export flows around the world account for 53% of global rosé exports (5.5 million hectolitres).

Sources : IWSR Wine Intelligence

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Global Trends

Low growth in 2020/2021, although there are still areas with strong potential for development. After several years of uninterrupted growth, global consumption of rosé wine subsided in 2020 and retreated in 2021. Countries such as France, the United States, and Italy show a particularly notable trend reversal in this regard. Nonetheless, avenues for growth still exist (particularly in Belgium, Central and Eastern Europe, Scandinavia and Asia-Oceania), and some markets even witnessed an upturn between 2019 and 2021 (Germany, UK and Netherlands). **Generally speaking, rosés serve as a "crisis absorber" in the category of still wines.**

In parallel, global rosé production continues to rise. This development raises some questions in a context of shrinking consumption levels. Production remains concentrated in three countries (France, Spain and the US account for 66% of worldwide production). Several countries have seen an upswing in rosé production, in the Southern Hemisphere (Chile and New Zealand) and Eastern Europe (Hungary, Romania and Bulgaria).

France has further solidified its global positioning in the world of rosé. It is the no. 1 producer, no. 1 consumer, no. 1 exporter in value (no. 2 behind Spain in volume) and no. 1 importer in volume (particularly entry-level Spanish wines).

International trade in rosé continues to progress. About half of all rosés cross at least one national border before being consumed. Spain remains the top exporter in volume, and France the top exporter in value.

The US market is shifting towards "dry", higher value rosés and away from its traditional blush/white zin. After a significant increase between 2015 and 2019, imports of rosé plummeted in 2020 and 2021. **In the category of imported rosé wines, France is the leader in volume and has traditionally been positioned as a "trend-setter".**

**Rosés that have historically been made in California. These wines tend to be richer in colour and higher in sugar than European rosés.*

Sources : IWSR Wine Intelligence

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