



Euromonitor
International

Sparkling Wine at a Crossroads: Navigating Sobering Times

October 2025

EXECUTIVE SUMMARY

Why read this report?

INTRODUCTION

Key findings

STATE OF PLAY: GROWTH TRAJECTORY INCREASINGLY UNDER STRAIN

Global sales see brief post-COVID sparkle but fails to expand its global reach
Global sales remain heavily reliant on highly mature and crisis-hit markets
Resilience expected in most large markets; Germany and Spain set to face saturation
Other sparkling wine forecast to outperform still wine, strong headwinds for Champagne
On-trade channel set to face continued headwinds linked to socioeconomic shifts

OTHER SPARKLING WINE: CONSUMPTION SHIFTS HELP SUSTAIN GROWTH

Perception as affordable treat helps growth amid price pressures but slowdown looms
Germany: A “canary in the coalmine” showing pervasive downtrading trends or outlier?
US: Popularity of other sparkling wine driven by shift to casual consumption occasions

CHAMPAGNE: EVER MORE PREMIUM AS VOLUME GROWTH FLOUNDERS

Champagne at a crossroads as brands shift more clearly towards premiumisation
France: Price polarisation shapes competitive landscape amid volume sales declines
UK: Champagne brands focus on exclusivity amid challenges and price polarisation
Champagne as a bellwether for global economic growth but faces unique constraints

COMPETITIVE LANDSCAPE SHIFTS INFLUENCED BY PRICE POLARISATION

Other sparkling wine: Major players retain a solid lead despite private label challenges
Oetker Group makes gains outside Germany helped by shifts in consumer attitudes
Champagne: Major brands retain halo effect of on-trade presence but face price battles

INNOVATIONS AND SHIFTS IN CONSUMPTION TRENDS AMID LOOMING CHALLENGES

Shift in consumption habits, celebrity backings and wine tourism may fuel innovations
Hampton Water Bubble rosé targets democratisation and casual drinking occasions
Scavi & Ray targets a relatively untapped niche with a low-alcohol Prosecco extension
Ruinart Blanc Singulier 2019 vintage communicates around climate change's impact
Nicolas Feuillatte targets a younger audience with a new bottle designed by singer Mika
Launch of Leonardslee helps build consumer awareness of premium Sussex wine
Climate change: Challenges for incumbents amid rise of emerging countries of origins
Looming US import tariffs and potential trade wars may lead to downward spiral
Ageing consumer base expected to fuel innovations to capture rising demand for RTDs

CONCLUSION

Key takeaways and recommendations

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/sparkling-wine-at-a-crossroads-navigating-sobering-times/report.