

TRENDS REPORT 2025

Enotria&Coe®



Enotria&Coe Trends Report 2025

The wine industry is evolving rapidly, driven by shifting consumer preferences, economic pressures, and a growing emphasis on sustainability. Our 2025 Trend Report explores the key developments shaping the market, from the rising popularity of sparkling wines to the increasing demand for low and no-alcohol options. Sustainability and innovative packaging continue to play a crucial role, while those that are redefining styles and techniques are catching the eyes of consumers across the globe.

Trends in the wine and spirits industries are not only broad movements, but can also be seen in the success of specific varieties. This year, Assyrtiko has emerged as our fastest-growing grape, reflecting a growing appreciation for fresh, mineral-driven white wines. As the global wine landscape continues to adapt, both large-scale innovations and niche varietal trends will shape the future of the industry

Wine:

Sustainability and Innovative Packaging

Our industry is undergoing a significant shift towards sustainability, with an increasing focus on eco-friendly packaging and innovative formats. As consumers become more environmentally conscious, wineries are responding by reducing their carbon footprint through lighter glass bottles, alternative packaging, and the integration of renewable energy. These advancements not only align with sustainability goals, but also cater to modern consumer preferences for convenience and lower environmental impact. A 2024 NielsenIQ report found that 85% of global consumers have shifted their purchase behaviour towards more sustainable options, including alcoholic beverages. This includes preferences for zero-waste production practices, eco-friendly packaging, and locally sourced ingredients.

In Italy, Tuscany - a region steeped in winemaking tradition - is amongst those redefining its global reputation by embracing sustainable practices. Many estates are investing in renewable energy and eco-friendly packaging. A prime example of this shift can be seen in Maremma, a coastal region in southern Tuscany, where innovation is thriving. This area is gaining recognition for its high-quality rosé wines, which are now increasingly available in sustainable packaging, appealing to both traditional wine enthusiasts and eco-conscious consumers.

Similarly, in France, sustainable packaging solutions are becoming more mainstream, with producers opting for lightweight glass bottles, cans, and bag-in-box formats. These alternatives not only reduce the environmental impact of shipping and production, but also offer practical benefits for consumers seeking portability and portion control. French wineries are leveraging these innovations to enhance both

sustainability and accessibility, ensuring that fine wine remains adaptable to modern lifestyles, whilst staying aligned with ecological responsibility.

Beyond environmental sustainability, there are those that are also prioritising social sustainability, with wineries and distilleries investing in ethical labour practices and community development. For example, Ugandan-based Kakira Distillery has established a charitable fund dedicated to local environmental, wildlife and water conservation efforts. Additionally, the company provides housing, clean water, electricity, education and healthcare for all employees, whilst operating extensive medical outreach programs and rural development initiatives to support local farming communities.

In Italy, Arnaldo Caprai in Montefalco has pioneered a socially inclusive approach to employment. Since 2016, in partnership with Caritas Foligno, they have integrated asylum seekers into agricultural work, creating a model that addresses labour shortages, whilst fostering social inclusion. These initiatives demonstrate how sustainability in the wine and spirits industry extends beyond packaging and environmental concerns to making a lasting impact on communities and livelihoods.

Low and No Alcohol

The demand for low- and no-alcohol wines is steadily rising alongside other drink markets. This is largely driven by health-conscious consumers and younger drinkers who prioritise moderation without sacrificing quality. This reflects broader shifts in the wine and beverage industry, where balance and wellness are becoming key factors in purchasing decisions. In the UK, sales of these beverages have risen notably, with demand during the Christmas season surpassing that of January. This shift is particularly evident among younger consumers, with 39% of 18-24 year-olds abstaining from alcohol entirely as per a YouGov survey conducted in partnership with the Portman Group. Low-alcohol wines, including Champagne and sparkling varieties, are gaining traction as producers innovate to meet evolving consumer preferences.

In France, producers are increasingly producing lighter, fresher style of wines in response to the global demand for lower alcohol options, particularly in the UK. French producers are responding by harvesting grapes earlier to retain acidity, whilst reducing sugar levels or by exploring naturally low-alcohol grape varieties. Regions such as the Loire Valley and Languedoc are emerging as leaders in this space, offering vibrant wines with ABV levels of 11% or lower. These wines align with the growing "less but better" movement, where consumers prioritise quality and experience over high alcohol content.

Meanwhile, in Germany, technological advancements in reduced-alcohol wine production are driving innovation. Winemakers are refining techniques to maintain the complexity and structure of traditional wines, whilst lowering their alcohol content. Standout producer, Leitz, continues to improve its range of low-alcohol wines, gaining recognition for its ability to balance flavour, texture and freshness. The development of high-quality, lower-alcohol wines is becoming an increasingly important aspect of the global wine market, with Germany leading the way.

Innovation in Winemaking - Forward Thinking in a Changing Climate

As climate change continues to reshape the global wine industry, winemakers are embracing innovation, leading to more adventurous styles that captivate modern consumers. Rising temperatures, unpredictable weather patterns and shifting growing conditions have prompted producers to explore new grape varieties, adapt vineyard management practices, and experiment with winemaking techniques. As a result, customers are becoming more open to trying bold, unconventional wines that reflect both ingenuity and a deep respect for the environment.

In Austria, a new wave of young winemakers is driving a vibrant natural and orange wine movement. Producers such as Erich Machherndl, the eighth-generation owner of a Wachau estate, have gained recognition for their expertise in crafting intriguing skin-contact wines. Under his 'Green Label' and 'Yellow Label' lines, Machherndl is showcasing the depth and complexity that can be achieved through minimal intervention winemaking, appealing to those seeking wines with authenticity and character.

In Greece, climate change has significantly influenced winemaking approaches, particularly in the production of bold red wines. With soaring temperatures and increasingly dry conditions, winemakers are adopting earlier harvesting techniques and refined vineyard management practices to maintain balance and freshness in their wines. Producers such as Kir-Yanni and Sigalas encompass this movement in their methods. These adaptations have resulted in red wines that are more approachable and versatile, enjoyable both with food and on their own.

In Australia, Mediterranean grape varieties such as Fiano, Sangiovese, and Nebbiolo have become a passion project for many winemakers, such as Pizzini in King Valley, as they seek solutions to climate change. These heat-resistant varieties, well-suited to Australia's evolving conditions, are now gaining traction among younger, more experimental drinkers who appreciate their distinctive profiles and sustainability benefits. This trend highlights how innovation in varietal selection is helping to future-proof the industry.

In New Zealand, sub-regional diversity in Marlborough is being increasingly explored, as microclimates play a crucial role in shaping wine styles. Rapaura Springs, for example, is leading the way in showcasing how different soils and climate conditions influence the expression of the same grape variety. This detailed regional approach is offering consumers a new level of depth and understanding when it comes to New Zealand wine.

Meanwhile, in South Africa, there has been a resurgence of interest in Cap Classique sparkling wines, which have long remained in the background of the country's wine scene. Over the past two years, these wines—whether crafted from Chenin Blanc or traditional Chardonnay-Pinot Noir blends—have gained popularity for their unique combination of sunny New World fruit and classic Champagne-like toastiness. This renewed enthusiasm demonstrates how innovation, tradition, and climate adaptation can come together to create exciting new wine experiences.

As the wine industry continues to evolve, staying attuned to these trends will be key for producers, retailers, and consumers alike. Whether through innovation, sustainability, or the rise of new varietals, the year ahead for wine promises to be as dynamic and diverse as ever.

Spirits:

The current economic climate is reshaping consumer behaviour in the on-trade, with a noticeable shift away from premiumisation. Rather than opting for doubles with mixers, consumers are increasingly choosing single measures or longer mixed drinks to make their money go further. This shift has had a significant impact on spirits, particularly in bars and restaurants, where spending habits are increasingly restrained. This trend has contributed to the growth of mainstream beer, which continues to grow YoY. This is largely driven by the subcategory of Stout. However, grocery sales are helping to offset some of the declines seen in the on-trade of spirits, ensuring that large brand owners still capture demand through retail channels.

Spirit Growth and the RTD Market

Despite economic pressures, most spirits categories are seeing growth, with the notable exception of gin, which continues to experience a significant decline. Whiskey, rum, tequila, and vodka are all showing positive momentum, driven by both consumer interest in classic serves and the resurgence of cocktail culture at home. The downturn in gin sales suggests that its explosive popularity of previous years has waned, with consumers shifting their preferences to other spirit categories that

offer perceived novelty or greater value. At the same time, convenience remains a key driver of purchasing behaviour, fuelling the rapid growth of the Ready-to-Drink (RTD) market. The global RTD cocktail sector, valued at \$1.01 billion, is projected to more than double to \$2.23 billion by 2029 according to Auguste Escoffier, as consumers seek high-quality, portable options that offer bar-level experiences at home or on the go.

Low and No Alcohol:

In response to rising duties, inflation, and economic pressures, many suppliers are strategically lowering the ABV of their products to mitigate price increases. Whilst this allows brands to manage costs and maintain competitiveness, these reductions are often not fully reflected in retail pricing, meaning consumers are paying similar prices for lower-strength products. This tactic aligns with the continued growth of the no-and-low alcohol trend, as well as shifting consumer preferences toward moderation. However, premiumisation is still a present force in the industry, particularly in off-trade and direct-to-consumer channels. According to IWSR Drinks Market Analysis, the premium-and-above spirits category is expected to grow 4% annually through 2026, as consumers continue to seek out high-quality, small-batch spirits and exclusive drinking experiences despite economic pressures.



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