Session 1: From Sparkling To NoLow

ProWein Preview – 24. September 2025

Agenda

1. Sparkling Wine Report & Crémant | Alexandra Wrann
2. Sparkling & No-Low | Martina Obregón
3. The Tasting Experience
4. NoLo Wines: The New Reality | Dr. Anja Zimmer

Sparkling Wine Report

Sneak Preview With a Little Bit of Crémant

Alexandra Wrann DipWSET

The Sparkling Report Powered by ProWein

50 billion US $

➢ The Idea

- Providing the most relevant information on the production and sales of sparkling wines
- A trustworthy foundation for buying and selling decisions
- Authentic industry insights

ProWein Sparkling Dossier 2025

The Sparkling Report Powered by ProWein

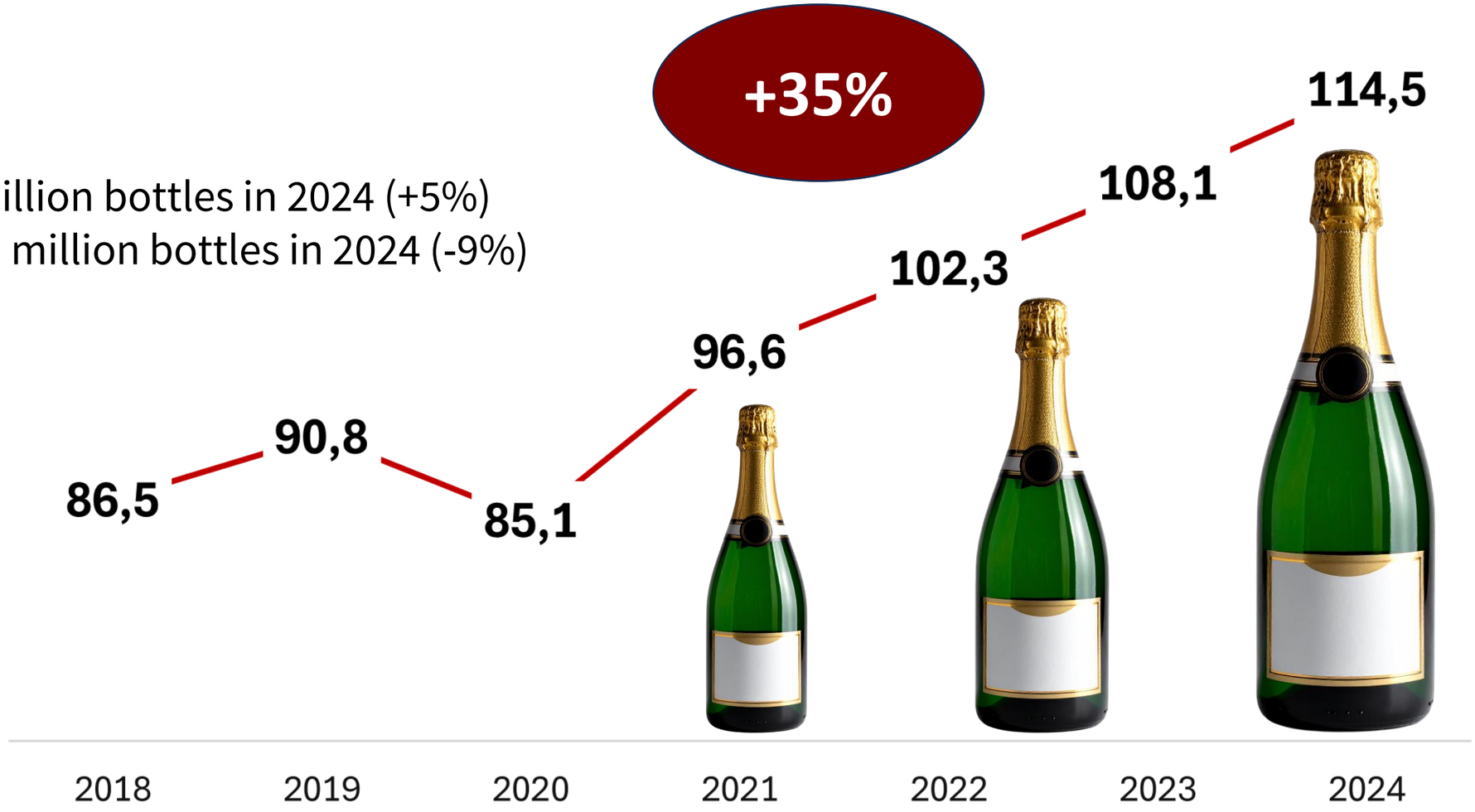
➢ The Content

- The most important sparkling wine producing regions
- Data from the most relevant sparkling wine markets
- The products consumers are currently looking for
- Insights from key industry players, with statements and assesments
- Digitally distributed via ProWein channels: website, social media

Sneak Preview Into an Emerging Category: Crémant

➢ **Succes story**

- Sales hit 114,5 million bottles in 2024 (+5%)
- Champagne: 271 million bottles in 2024 (-9%)



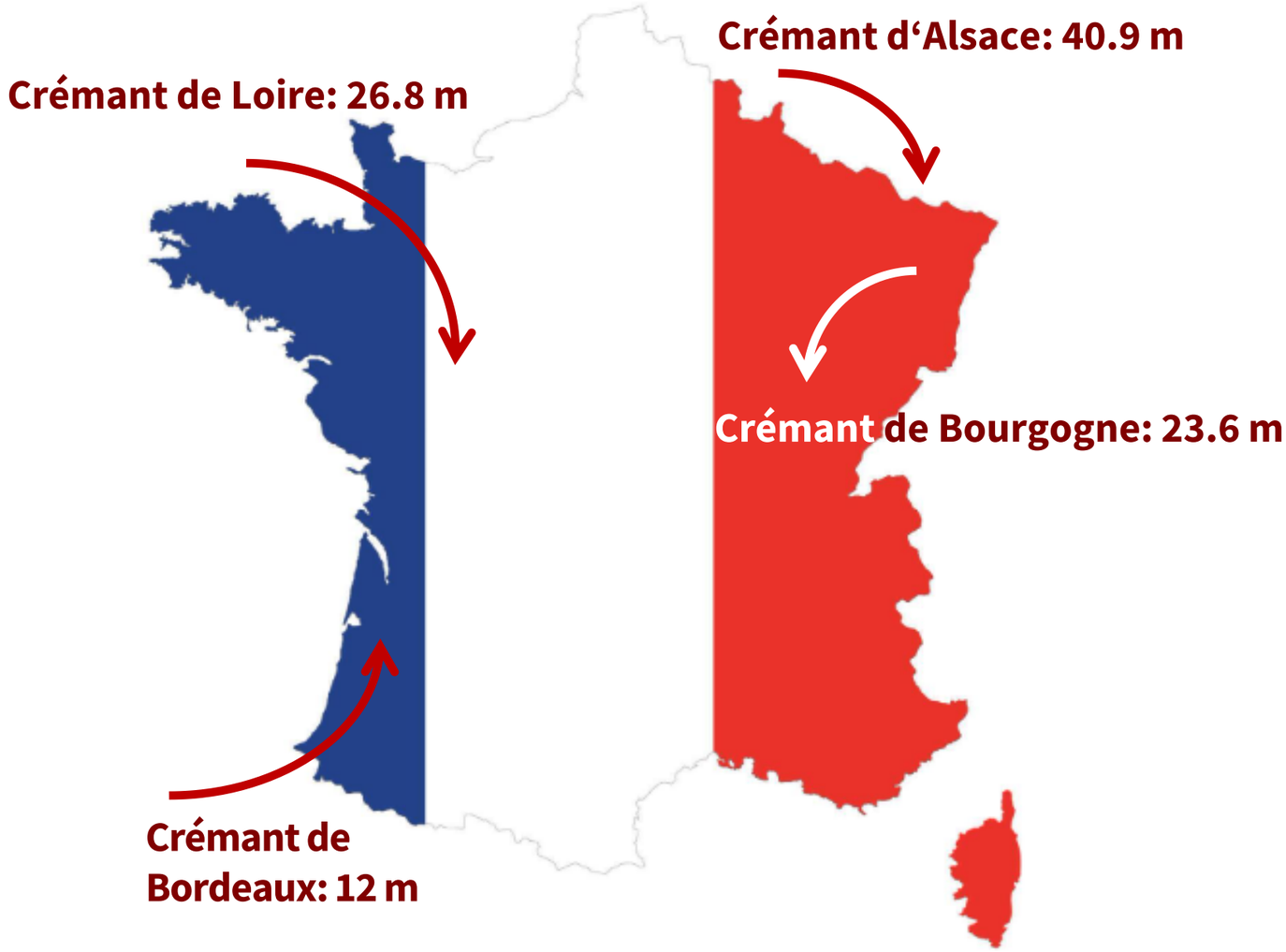
Sneak Preview Into an Emerging Category: Crémant

➢ The Regions

- Alsace as the leading region in production and sales
- Loire as the fastest-growing region in exports
- Bordeaux gaining importance as a response to the decline in red wine

➢ The Plus in Origin

- Crémant outside of France
  →Luxembourg
  →German Crémant



Sneak Preview Into an Emerging Category: Crémant

➢ The Diversification

- 2020: 68% domestic sales
- Now: Export risen to 41% (+15%)

➢ The Markets

- Germany
- UK
- USA
- Belgium
- Scandinavia
- Japan

The Consumer: Why Does Crémant Thrive?

➢ The Occasions

- Festive events & all year round

➢ The Economy: The Lipstick-Effect (Leonard Lauder, Estée Lauder, 2008)

- A treat in challenging times - but not the most expensive one
- Crémant fills this gap

The Easiness of Crémant

➢ The Easy Content

- Varieties such as Chardonnay are well known and don‘t need explanation

➢ The Easy-Drinking

- Fresh and light products
- 9 months on the lees give a certain sensoric density but don‘t overwhelm the laymen‘s palate

➢ The Easy Origin

- Crémant regions are wine regions

➢ The Easy-Spelling

- Pronounciation is key

NoLo Wines: The New Reality

Markets, Trends, Strategies

Dr. Anja Zimmer

#1 in Growth – But Still in a Niche

➢ Market size:

- Single-digit billion USD
- Different estimates regarding the exact number

➢ Growth:

- approx. +10% CAGR (2025-2033)*
- „Fastest growth in global sales volume & value within the beverage sector.“

➢ Key regions:

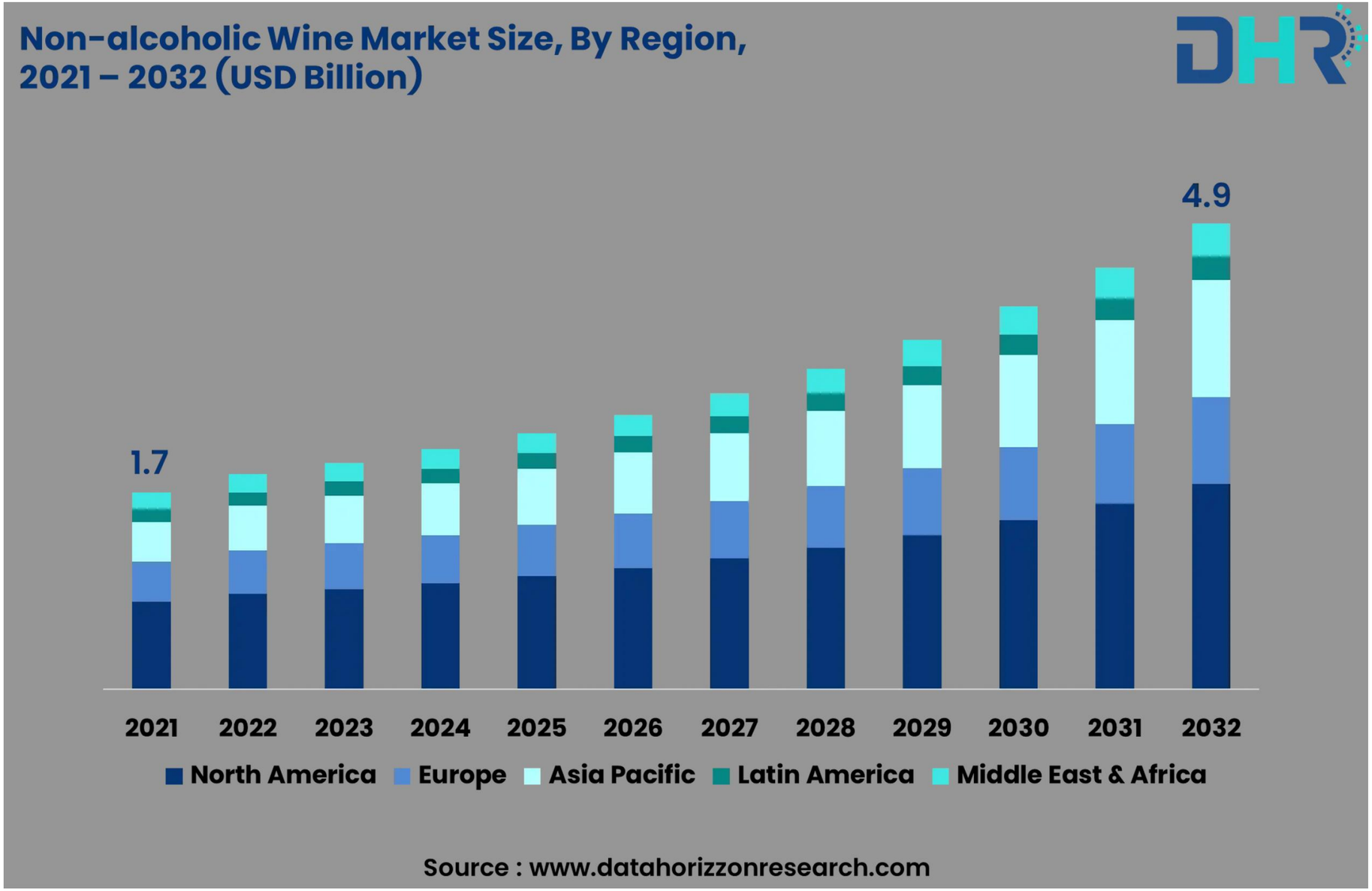
- USA
- Europe (e.g. Germany, UK)
- Asia-Pacific

CAGR (2025–2033)

≈10%

Non-Alcoholic Wine

*Source: DHR – Data Horizon Research, https://datahorizzonresearch.com/non-alcoholic-wine-market-2970

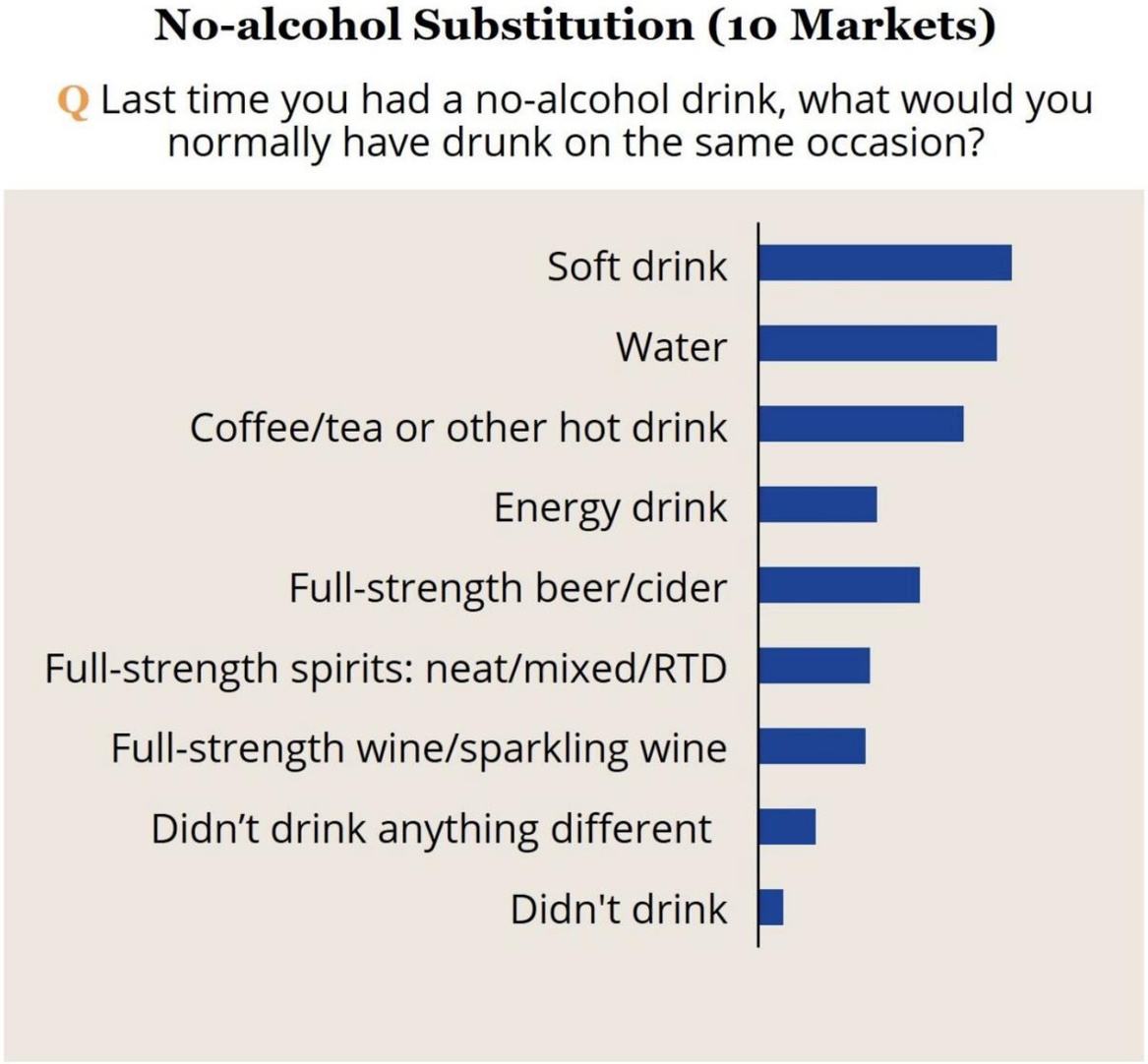


Source: DHR – Data Horizon Research: https://datahorizzonresearch.com/non-alcoholic-wine-market-2970

Cross Category Competition

Where are consumers switching from?

Non-alcoholic drinks are usually replaced by other non-alcoholic drinks.

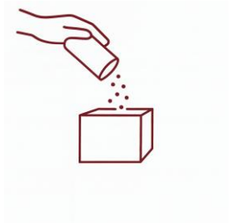


Source: IWSR No/Low Alcohol Strategic Study, Q3/2022
https://www.theiwsr.com/insight/key-statistics-the-no-alcohol-and-low-alcohol-market/

Trends & Expectations

Getting sugar out is key.

GenZ doesn’t reach for a wine bottle.



Put better things in, get better things out.

Regulation: Follow the rules or produce outside the wine family.

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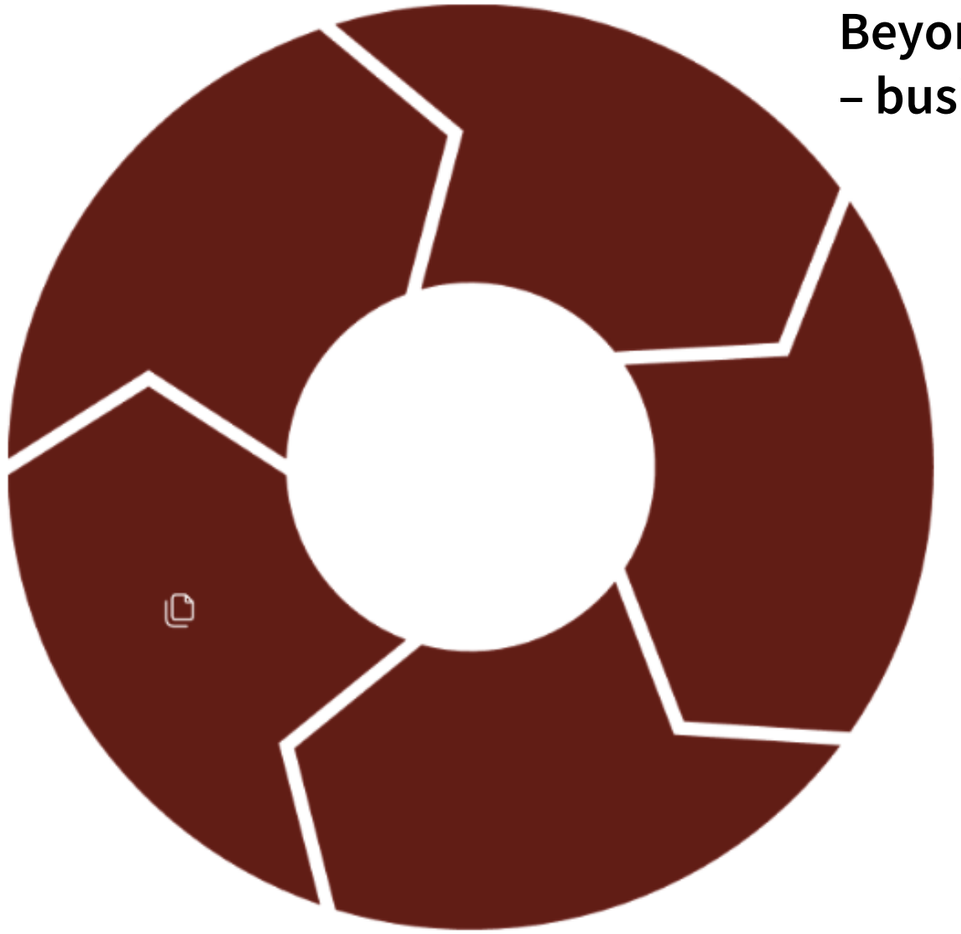
Marketing Messages

- Market non-alcoholic wines not as substitutes, but as lifestyle choices.
  (ChatGPT)
- All the positives of wine – plus the extras: no alcohol, fewer calories.
  (Dan Harwood, Schloss Wachenheim)
- We have to make sure Coca-Cola stays off the table.
  (Matthias Schmitt, Geisenheim University)

And please give the product a sexier name!

Marketing Pillars

Quality first
– no cheap shortcuts



Beyond New Year’s Eve
– business lunch, daily moments

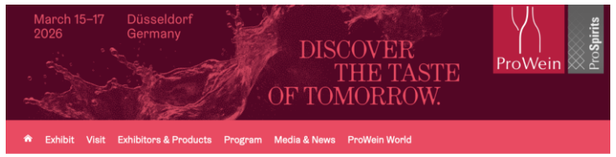
Event sponsorships
– talk to the sport crowd

Gateway to wine
– entry point for new consumers

Education, education, education

More Information

ProWein Business Report



International Trade Fair Wines and Spirits / Visit / Services / Business Reports / ProWein Business Report 2025

ProWein Business Report 2025

Commissioned by ProWein, Geisenheim University surveyed over 1,300 experts from across the global wine value chain in late 2024 for the eighth consecutive year. These industry insiders, representing more than 30 countries, include wine producers from major wine-growing regions in Europe and overseas, exporters, importers, specialist wine merchants, and representatives from the food service, hospitality, and hotel sectors. This year's report incorporates an enhanced methodology to capture the diverse perspectives and conditions across different countries and regions. For the first time, responses are representatively weighted for both producers and trade indices based on OIV data, providing a more comprehensive and balanced overview.

Go to download area

ProWein Business Report 2025: "The Future of Wine"

Chart 1 Challenges for the Wine Sector

The ProWein Business Report continues the tradition of ProWein's Market Barometer, a unique and regular insight tool that has illuminated the international wine industry since 2017. The 2025 report identifies key challenges facing the sector amidst the ongoing economic crisis and highlights solutions that industry experts believe can help the wine trade adapt to evolving consumer demands.

"The wine industry is at a pivotal crossroads. While the worst effects of rising costs for producers appear to have been overcome in most countries, producers and the wine trade now face the challenge of adapting to rapidly changing consumer preferences," explains Prof. Simone Loose, Head of the Institute for Wine and Beverage Business at Geisenheim University. She highlights a crucial finding from the ProWein Business Report:

https://t1p.de/vk59x

The New No-Reality

Internationale Fachmesse Weine und Spirituosen / Besuchen / Services / Business Reports / Die neue No-Realität

The new No-Reality

© freepik - The wine and beverage market is undergoing change. Shifts in consumer behavior are challenging producers and marketers: people are drinking less alcohol, and new product categories are emerging. Alcohol-free alternatives are gaining particular importance – including de-alcoholized wine.

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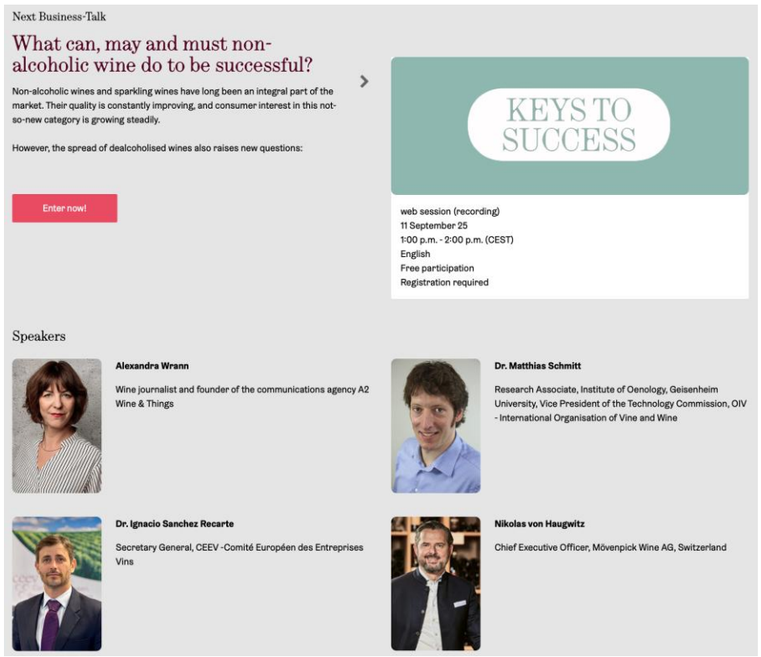
Studies confirm that consumers are cutting back on alcohol consumption. Increasingly, they are turning to alcohol-free alternatives, as highlighted by research from the International Wine and Spirits Record (IWSR). This trend is expected to intensify over the coming years, with younger generations in some cases adopting a fully abstinent lifestyle – a development supported by numerous studies. At the same time, evidence from markets such as the UK suggests that consumers may even switch between alcoholic and non-alcoholic drinks on the same occasion – a behavior referred to as "zebra striping."

https://t1p.de/s84ft

ProWein Business Talk



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THINKING OUT OF THE BOTTLE

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