



SUMMARY

Publication 2021

Key figures 2019

Rosé Wines World Tracking: confirmations and new trends!

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ROSÉ WINES WORLD TRACKING IS:

- 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

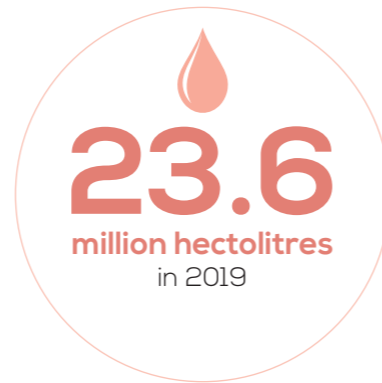


Published in May 2021

Source: CIVP/FranceAgriMer – Dowel Stratégie

Consumption

Since the creation of Rosé Wine World Tracking in 2002, worldwide consumption of rosé has been on the rise. It has increased by an average of nearly 1% annually, over the past 17 years. The dynamics of global rosé wine consumption are driven in large part by Western Europe, as well as by the USA.



Worldwide rosé consumption has risen dramatically since 2002 (up 20%), with fluctuations from one year to the next. However, it seems to have plateaued in the last two years. The proportion of rosé wine consumption out of total still wines has also grown over the past few years, even if it seemed to decline slightly in 2019.

As a result, global rosé consumption totalled 23.6 million hectolitres in 2019, accounting for 10.5% of total still wine consumption, all three colours combined.

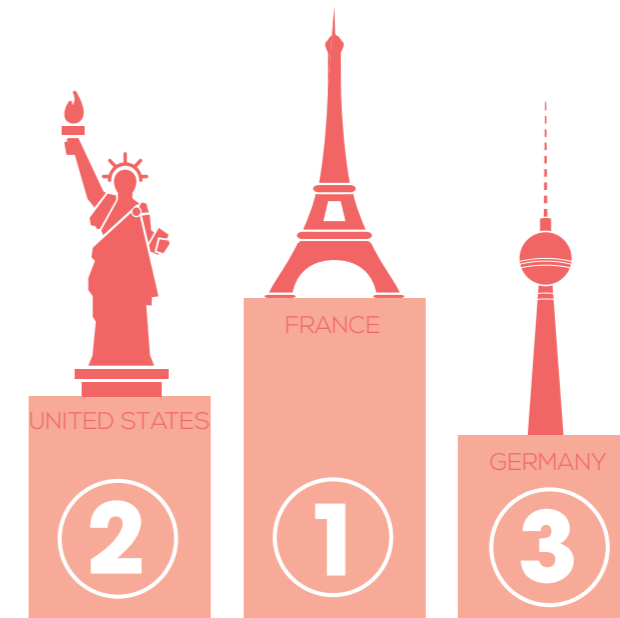
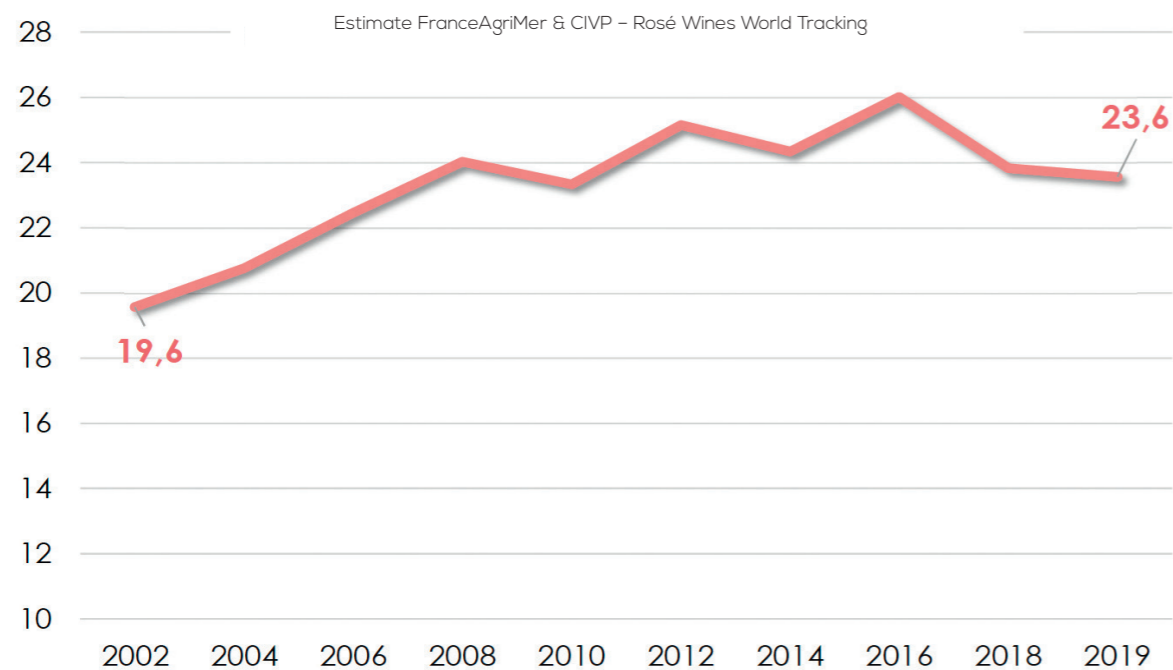
Once again, more than half of worldwide rosé consumption took place in the three leading

consumer countries – France, the United States and Germany – in 2019:

- France consumed 35% of the total volume worldwide, 4% higher than a decade ago.
- The US share of global consumption was 15%.
- German consumption rose slightly to 7% of global rosé consumption.

Italy's consumption of rosé wine, which had been on a downward trend since 2005, now seems to be stabilizing at around a million hectolitres.

Development of global rosé wine consumption from 2002 to 2019
(in million hl)



It is worth noting that, in Spain, after nearly 10 years of decline, consumption grew for the first time in 2019, ending up just behind South Africa, where consumption has been decreasing since 2008.

To conclude this world tour, Australia saw its rosé consumption double between 2018 and 2019 (up tenfold since 2002), so it now comes in at 19th place, ahead of Sweden.

In the USA, average annual consumption per person was fairly stable in 2019, with approximately 1 litre of rosé consumed per person (over the age of 15). In Germany, this same figure rose by 10%, now exceeding 2.4 litres. France remains far and

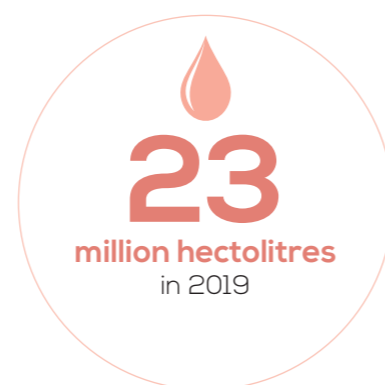
away the leader in annual consumption per person, despite a 6% shrinkage to 15.1 litres in 2019.

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

Production

Rosé wine production was similar to its 2018 levels, following a significant increase that year.



Global rosé wine production remained relatively stable. It stood at 22.4 million hectolitres in 2002 and has since risen to **23 million hectolitres in 2019**.

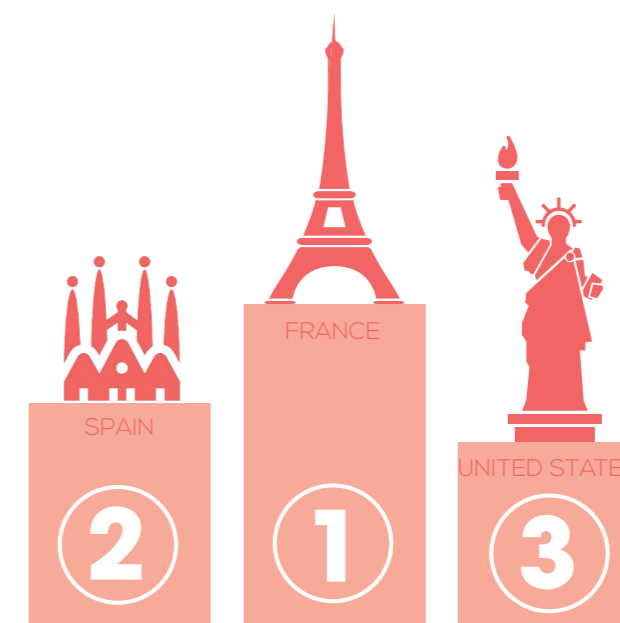
The proportion of rosé out of total still wine production is still generally on the rise in the long term. **It reached a particularly high level in 2019, at close to 10%.**

Spain resumed its position as **2nd largest producer of rosé** in the world in 2018, a position it confirmed in 2019. The country's production, which has been accelerating over the last two years, came to 4.9 million hectolitres in 2019.

Italy, the world's **number 4 producer of rosé wine**, saw its production slashed in half in the space of 10 years. Despite a slight upswing in 2018, it slipped again in 2019 to 2.2 million hectolitres.

The top 10 rosé winemaking countries were unchanged in 2019:

Chile, which is one of the **"new producers"**, saw its rosé production decrease for the first time in a decade.



• In **Europe**, while rosé wine production is still dominated by **France, Spain** and **Italy**, those countries' numbers have been shrinking over the last 10 years (-5%). Conversely, the other European rosé producers* expanded over the same period (+16%) and now account for 12% of Europe's rosé wine production. As a result, total European rosé wine production amounted to 70% of worldwide production in 2019.

* The other European countries tracked by Rosé Wine World Tracking are as follows: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Finland, Germany, Greece, Hungary, Ireland, Macedonia, Moldova, Netherlands, Norway, Poland, Portugal, Romania, Russia, Slovakia, Sweden, Switzerland, Turkey, Ukraine and United Kingdom.

• In Germany, the dynamic rosé production observed in 2018 continued in 2019 (+9%), after five years in sharp decline up until 2017.

• Portugal's rosé production has been inconsistent for nearly 10 years now, seeming to fluctuate around 400 million hectolitres.

• Swiss production, on the rise since 2016, has increased by a factor of 1.8 in 10 years.

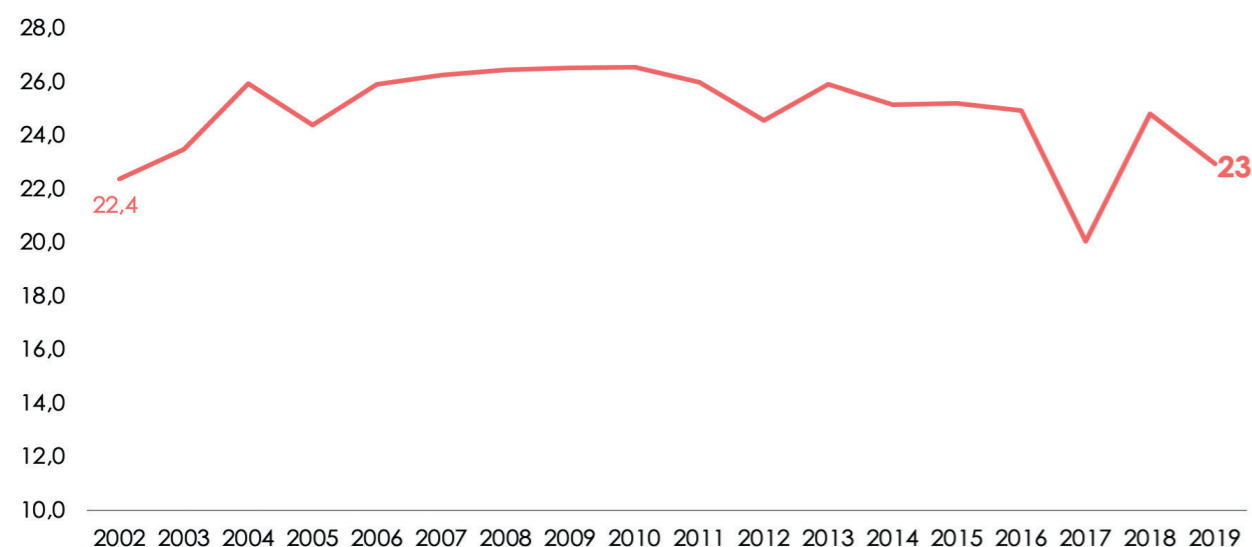
• Only New Zealand really thrived, with a 31% bump over 2018. In fact, rosé production there has grown continuously since 2002, multiplied more than fourfold in the space of 10 years.

• South Africa, whose production had doubled over 10 years, witnessed a backside by one-third compared to 2018.

• Although it is the 2nd biggest consumer in litres per person, Uruguay's rosé production has been declining for the past 15 years, down by an average of 3% annually.

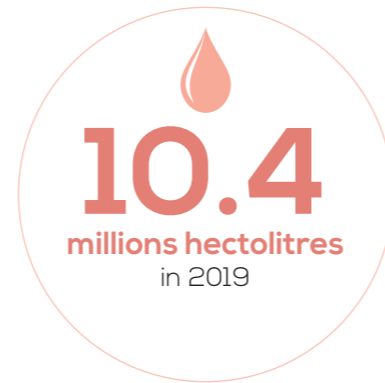
Development of global rosé wine production from 2002 to 2019
(in million hl)

Estimate FranceAgriMer & CIVP - Rosé Wine World Tracking



Imports

After being on the rise since 2002, imports declined to 10.4 million hectolitres in 2019. Nonetheless, the proportion of imported rosé wines increased to 49% of the quantity consumed, returning to its highest level. As a result, in 2019, more than 4 in 10 bottles of rosé were imported.



The volume of imported rosé wine went from 10.9 million hectolitres in 2018 to 10.4 million in 2019. This slump goes hand in hand with the downturn in global rosé consumption. It should however be noted that the volume of imports rose by 22% in 10 years, a sign of dynamic trade in rosé wine around the world.

Germany and the UK mainly explain the drop in imports in 2019.

For the first time, the proportion of imported rosés out of total worldwide rosé consumption substantially exceeded the proportion of still wines imported (43% vs 41%). This figure has doubled since 2002.

As in 2018, the four main importers were France, Germany, the United Kingdom and the United States. Those four alone account for 62% of the quantity imported and 54% in value in 2019 (representing stable volumes and 1% less in value compared to 2018).

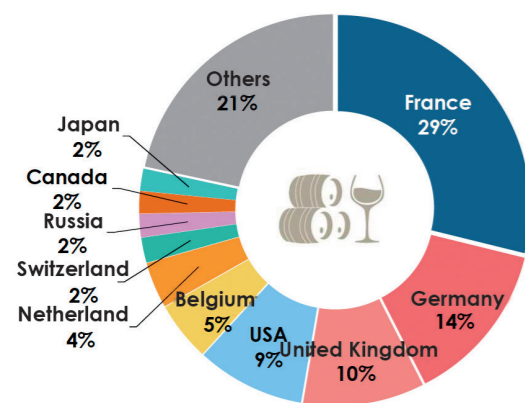
France remains the primary market for imports by volume. The quantity of rosé imported into France is even on the rise, as is its market share out of global rosé imports, which increased from 26% in 2018 to 29% in 2019.

The USA is still the leading importer of rosé wine by value, with nearly one-fourth of the global market, or €526 million, which was likewise up from 2018. The imported volumes were less than the previous year, meaning the growth (+7%) was primarily due to higher average price points.

In 2019, the average price of imports into each of the 10 main import countries increased, with the exception of France (-13%). Consequently, the average price of rosés imported by those 10 countries was up (+5%).

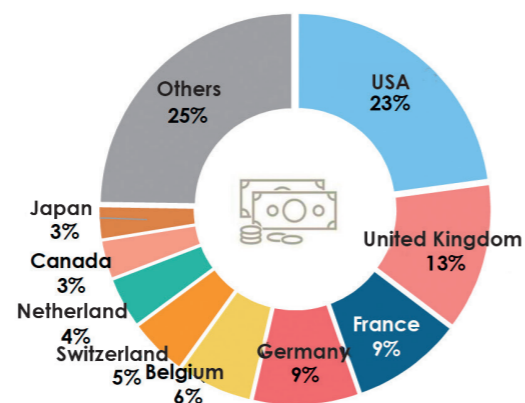
The main importers of rosé wine in 2019
(as a % of total rosé wine imports by VOLUME)

Estimate FranceAgriMer & CIVP – Rosé Wines World Tracking



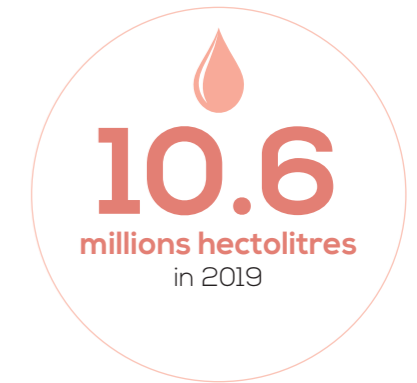
The main importers of rosé wine in 2019
(as a % of total rosé wine imports by VALUE)

Estimate FranceAgriMer & CIVP – Rosé Wines World Tracking



Exports

Worldwide rosés exports remained stable in volume in 2019 and increased slightly in value, up 3% in one year.



France, Italy and Spain are still the main exporters. They alone account for two-thirds of global rosé exports in volume and close to three-fourths in value.

Exports from all the leading countries changed very little between 2018 and 2019.

Spain, the number 1 rosé exporter in the world, largely dominated the global market, with a 41% market share in volume. In 2019, the country returned to its highest level of rosé exports, which it had previously attained in 2015.

Italy moved ahead of France, reclaiming its 2nd-place position in global rosé exports. The two countries have been neck and neck since 2013 and regularly trade places on the silver and bronze

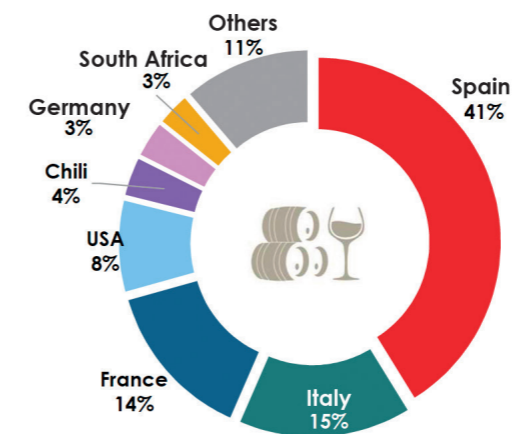
levels of the "export podium". Although Italy's export volumes were cut in two in the space of 10 years, the country seems to be moving more upmarket.

As for French rosé exports, they have been stagnating in volume but rose by 7% in value compared to 2018. France is the 1st biggest exporter in value and the primary exporter of premium rosé wines, with an average price of €3.75 per 750 ml bottle (up 55% in five years, the largest growth observed).

The average price of exports from the top seven export countries has surged by nearly one-third in five years, with the exception of the USA and Chile, whose export prices have been declining since 2016 and 2014, respectively.

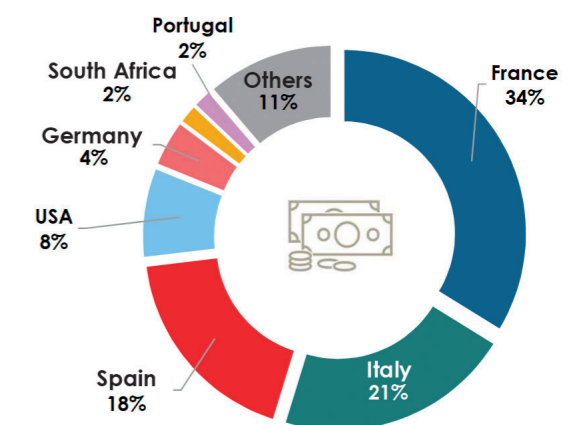
The main exporters of rosé wine in 2019
(as a % of total rosé wine exports by VOLUME)

Estimate FranceAgriMer & CIVP – Rosé Wines World Tracking



The main exporters of rosé wine in 2019
(as a % of total rosé wine exports by VALUE)

Estimate FranceAgriMer & CIVP – Rosé Wines World Tracking



Conclusion

In spite of a slight decline in 2019 (down 1%), **worldwide rosé wine consumption is generally on the rise over the long term.**

In 2019, rosé consumption totalled 23.5 million hectolitres. This figure is 23% higher than global consumption in 2002.

The world's rosé production seems to have dropped in 2019, in a more pronounced way than its consumption (down 7%). That being said, **global production has fluctuated between 23 and 26 million hectolitres annually since 2003.**

In 2019, total rosé wine production did not cover the markets' needs, after the positive growth in 2018. Still, since 2012, pressure on upstream activities has intensified. While the gap between worldwide rosé production and consumption was even more pronounced in 2017, due to a lack of available French rosés, this scissors effect was due more in 2019 to a substantial decrease in production in multiple countries compared to consumption levels (primarily in Argentina, Australia, Germany, Italy, South Africa and the United States). Conversely, France's balance "improved" in 2019.

There were no noteworthy changes amongst the top 3 countries for each of the four tracked indicators (consumption, production, imports and exports) in 2019.

Australia, which was previously a net exporter of rosé wine, is now a net importer.

In terms of exports, the average price of rosé sold around the world continues to climb, up 29% since 2015, for an average price of €1.57 per 750 ml bottle in 2019. France is the leader by far and has confirmed its status as a producer and exporter of premium rosés, with an average price of €3.75 per 750 ml bottle in 2019.

Rosé trade flows from Spain to France remained amongst the highest, despite the fact that their share out of global trade decreased. They accounted for 20% of global trade by volume but just 5% by value.

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