

Organic Wine Market– Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Product Type (Sparkling Wine, Still Wine), By Packaging (PET Plastic Bottle, Glass Bottle, Can, Tetra Pack & Others), By Distribution Channel (Supermarkets/Hypermarkets, Specialty Stores, On-Trade (Bars, Hotels, and Restaurants), By Region, Competition

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Abstracts

The global organic wine market was valued at USD 10.35 billion in 2022 and is projected to experience robust growth in the forecast period, with a CAGR of 11.05% through 2028. Organic wine refers to wine made from grapes cultivated in accordance with organic farming principles, which involve the avoidance of artificial chemical fertilizers, pesticides, and herbicides. The production of organic wine adheres to strict regulations and certification processes to ensure the cultivation of grapes using organic methods. Organic winemakers prioritize maintaining biodiversity, soil fertility, and ecological balance in their vineyards. They employ natural and sustainable practices such as composting, cover cropping, and natural pest control methods. Furthermore, organic winemaking typically limits or eliminates the use of sulfites or other synthetic additives during the winemaking process.

The goal of organic winemaking is to produce wines that are not only environmentally friendly but also reflect the terroir and express the authentic flavors of the grapes. Consumers who seek organic wines often appreciate perceived health benefits and the preservation of the environment.

Key Market Drivers

Environmental Concerns

Growing awareness of the impact of conventional agriculture on the environment is a significant driver for the organic wine market. Consumers are increasingly concerned about sustainability and are actively seeking products produced using environmentally friendly practices. Organic farming methods, which eschew synthetic pesticides and fertilizers, resonate with consumers who prioritize eco-friendly products.

Health and Wellness Trends

The rising focus on health and wellness is another crucial driver for the organic wine market. Consumers are becoming more conscious of their consumption choices and are opting for organic products due to perceived health benefits. Organic wines, made from grapes grown without synthetic chemicals, are viewed as healthier and more natural alternatives to conventionally produced wines.

Changing Consumer Preferences

There has been a noticeable shift in consumer preferences towards organic and natural products across various industries, including the wine sector. Millennials, in particular, are driving this trend as they seek out products that align with their values and lifestyles. As this demographic becomes a significant consumer group, the demand for organic wines continues to rise.

Government Support and Regulations

Governments worldwide are implementing regulations and providing support for organic farming practices. This includes certifications and labeling requirements that enable consumers to identify and trust organic products, including organic wines. Such initiatives foster consumer confidence and drive market growth.

Expansion of Distribution Channels

The increased availability of organic wines through various distribution channels has contributed to market growth. Organic wines are now more accessible through online platforms, specialized retailers, and even mainstream supermarkets. This expanded availability has facilitated consumer discovery and trial of organic wines, resulting in a

surge in demand.

Rising Awareness and Education

Efforts by industry associations, wine producers, and sustainability organizations to educate consumers about the benefits of organic wines have played a vital role in propelling market growth. Through campaigns, tastings, and events, these entities have successfully raised awareness about the positive environmental and health impacts associated with choosing organic wines.

Key Market Challenges

Limited Supply

One of the major challenges faced by the organic wine market is the limited supply of organic grapes. Organic vineyards require strict adherence to organic farming practices, which can be more labor-intensive and costly compared to conventional vineyards. Consequently, the supply of organic grapes may not meet the growing demand for organic wine.

Higher Production Costs

Producing organic wine involves higher production costs compared to conventional wine. Organic vineyards often necessitate additional investments in organic fertilizers, pest control methods, and sustainable farming practices. These increased costs can result in relatively higher prices for organic wines.

Consumer Perception and Awareness

While the demand for organic products, including wine, is increasing globally, there is still a need for greater consumer awareness and understanding of organic certifications and labels. Many consumers are not fully aware of the distinctions between organic and conventional wines, which can influence their purchasing decisions.

Regulatory Challenges

The organic wine industry is subject to various regulations and certifications that ensure the authenticity and quality of organic products. However, navigating these regulations and obtaining certifications can be intricate and time-consuming for producers.

Additionally, regulations may vary across different regions and countries, posing challenges for international trade of organic wine.

Competition from Conventional Wines

The organic wine market faces competition from conventional wines, which are often more readily available and may offer lower prices. Conventional wines benefit from long-established distribution networks and economies of scale, giving them a competitive edge over organic wines.

Key Market Trends

Growing Health Consciousness

Consumers are increasingly health-conscious and seek products that are natural, organic, and free from synthetic chemicals. Organic wines, made from grapes grown without pesticides, herbicides, or artificial fertilizers, fulfill this demand. The health benefits associated with organic wines, such as higher antioxidant content and lower sulfite levels, are attracting a wider consumer base.

Sustainable and Eco-friendly Practices

The organic wine industry places strong emphasis on sustainable and eco-friendly practices. Producers are adopting organic farming methods that prioritize soil health, biodiversity, and water conservation. Additionally, organic wineries are implementing environmentally friendly packaging solutions, such as lightweight materials and recyclable bottles, to reduce their carbon footprint.

Rise in Organic Wine Certification

To ensure transparency and trust in the market, organic wine certification programs have gained prominence. These certifications guarantee that the wines meet specific standards and regulations set by organizations like USDA Organic, EU Organic, and Demeter. As consumers become more aware of these certifications, they are increasingly seeking out wines with recognized organic labels.

Expanding Distribution Channels

Organic wines are no longer limited to niche markets. They are gaining broader

distribution and availability, reaching both traditional wine retailers and specialized organic stores. Online platforms have also played a significant role in expanding the reach of organic wines, allowing consumers to access a wide variety of products from different regions.

Increasing International Trade

The global organic wine market is witnessing a rise in international trade as consumers develop a taste for organic wines from various regions. Traditional wine-producing countries like France, Italy, and Spain dominate the market, but countries such as the United States, Australia, and New Zealand are also emerging as significant organic wine producers and exporters.

Premiumization and Product Innovation

Organic wines are no longer perceived as inferior in quality or taste. Producers are focusing on creating premium organic wines that can compete with conventional wines in terms of flavor profiles and complexity. The market is witnessing innovations such as organic sparkling wines, orange wines, and natural wines, which cater to evolving consumer preferences.

Rising Demand for Biodynamic Wines

Biodynamic wines, a specialized segment within the organic wine market, are gaining popularity. Biodynamic farming methods go beyond organic practices by incorporating principles of holistic land stewardship, lunar cycles, and natural preparations. These wines offer a unique selling point for environmentally conscious consumers seeking a deeper connection to the land and the cultivation process.

Segmental Insights

Product Insights

The organic sparkling wine segment has established a dominant position in the market, representing the largest share of revenue. Sparkling wine is a category renowned for its effervescence and celebratory charm. The most famous variant of sparkling wine is champagne, originating from the Champagne region of France. However, sparkling wine isn't limited to just champagne; it encompasses a diverse array of types, including Prosecco from Italy, Cava from Spain, and other regional specialties.

The sparkling wine production method is different from still wine. This process involves secondary fermentation that occurs within the bottle, creating carbonation and giving rise to the characteristic bubbles. Winemakers add a mixture of yeast and sugar to the base wine, which triggers secondary fermentation in the sealed bottle, trapping carbon dioxide within. This process can take months or even years, depending on the desired level of complexity and finesse.

Packaging Insights:

The bottles segment has emerged as the dominant force in the market, capturing a significant revenue share. Glass bottles serve as the primary packaging choice for organic wines and are widely utilized across the beverage industry. Recognized as the third most prevalent packaging material globally, glass offers noteworthy advantages such as recyclability, reusability, and inertness. Its inert nature allows for extended wine storage compared to plastic bottles and cans.

Meanwhile, the cans segment is projected to exhibit growth throughout the forecast period. Cans are increasingly gaining traction in the beverage industry, particularly metallic cans like aluminum and steel, which are extensively employed in carbonated drink packaging. Cans provide enhanced convenience and portability compared to bottles, fueling the burgeoning demand for canned wines. Additionally, aluminum cans weigh less than glass bottles, thereby reducing the carbon footprint during transportation from vineyards to distributors. This heightened focus on environmentally friendly packaging has further amplified the demand for organic wines.

Distribution Channel Insights:

The on-trade segment is projected to experience significant growth during the forecast period. The on-trade distribution channel encompasses various establishments such as bars, clubs, restaurants, hotels, coffee shops, and winemaker's stores. The COVID-19 pandemic had a significant impact on the growth of the on-trade segment, as these aforementioned outlets were forced to close, and international tourism came to a halt due to strict lockdown measures implemented worldwide.

Regional Insights:

Europe dominated the market and accounted for the largest revenue share in 2022. A few European countries accounted for over 50.0% of the market share. Germany is the

largest consumer of organic wine. According to the International Wines and Spirits Record (IWSR), Germany, France, and the U.K. were the top three markets, accounting for approximately 24%, 16%, and 10% of global organic wine consumption, respectively. Europe remained the world's highest consumption center for organic wine. The consumers in the region are more aware of organic products, and thus, consumption of organic products is high in Europe compared to other regions in the world.

North America is the second-largest market for organic wines in the world. The U.S. dominated the market for organic wine in 2022 as the country is the third-largest consumer of organic red wine in the world, after France and Germany. Consumers in the U.S. are shifting from conventional products to organic products. As per the Organic Trade Association (OTA), organic product sales registered a growth of 12.4% in the U.S. in 2020. Organic product sales reached a value of USD 60 billion in 2020 in the U.S.

Key Market Players

King Estate Winery

Grgich Hills Estate

Avondale

Elgin Ridge Wines

Societa Agricola QuerciabellaSpA

Frey Vineyards

Kendall-Jackon Winery

The Organic Wine Company

Bronco Wine Company

Emiliana Organic Vineyards

Report Scope:

In this report, the global organic wine market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Organic Wine Market, By Product Type:

Sparkling Wine

Still Wine

Global Organic Wine Market, By Packaging:

PET Plastic Bottle

Glass Bottle

Can

Tetra Pack

Others

Global Organic Wine Market, By Distribution Channel:

Supermarkets/Hypermarkets

Specialty Stores

On-Trade

Global Organic Wine Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the global organic wine market.

Available Customizations:

Global Organic Wine Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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