Global Non-Alcoholic Wine Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

Moving forward, together

Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

Disclaimer

This report was prepared by shev.io solely for information purposes. shev.io does not guarantee the accuracy and completeness of all information contained in the report, as the data in some sources may have been distorted inadvertently or deliberately. The information presented in this report must not be construed, directly or indirectly, as containing recommendations for further business action. All opinions and estimates contained in this report reflect the authors' judgement as at the date of publication and may be changed without notice.

shev.io accepts no liability for any loss or damage arising from any third party's use of the information contained in this report, including published opinions or conclusions, or for consequences caused by the incompleteness of the information presented. The information presented in this report is obtained from open sources. Additional information may be provided on request.

This document, or any part of it, may not be distributed without the written permission of shev.io, nor reproduced by any means.

Terms of use

This report is provided to the user under a **non-exclusive, non-transferable, limited licence** solely for internal use within the purposes for which the report was lawfully acquired.

The user **may not**, in whole or in part, transfer, sell, gift, publish or otherwise distribute the report to third parties, nor pass it to any other legal entities, partner organisations or external teams (including affiliated companies). It is prohibited to place the report (or fragments of it) in the public domain (websites, social networks, messengers, file-sharing services, open-link cloud storage) or to provide access through third-party services where this allows third parties to review the materials.

If the report is purchased by a **company**, its use is permitted **only by that company's employees** for internal tasks. Passing the report to contractors, consultants, freelancers, agencies and any external parties is prohibited.

All exclusive rights to the report — including its structure, texts, data selection, visualisations, tables, charts and design elements — belong to the rights holder (shev.io) or are used on lawful grounds. The user receives the right to use the report only within these terms.

Without shev.io's written consent it is prohibited to create derivative products based on the report, to use it as part of a commercially distributed product or service, or to remove or alter copyright notices.

The use of **short quotations** and fragments is permitted **only in internal documentation** (internal memos, reports, presentations, working correspondence), provided the meaning and context are preserved and the source is credited: *shev.io*. Any publication or use of the materials in places accessible to third parties is permitted only with shev.io's prior written consent.

Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2024)	USD 2.4 bn
Forecast (2031)	USD 6.1 bn
CAGR (2021-2031)	14.4%
Study period	2021-2031
Largest region	Europe · 38.8%
Fastest-growing region	Asia-Pacific · 16.8%
Market concentration	Moderate
Licence	Individual / Company

The global non-alcoholic wine market reached USD XXX billion in 2024 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe held XX% of 2024 revenue, supported by established dealcoholisation capacity, broad grocery distribution and harmonised EU wine rules, while Asia-Pacific will record the fastest regional CAGR at XX%. Sparkling wine generated the largest product-style share at XX%, reflecting its strong fit with celebrations, premium hospitality and adult social occasions. Investment is moving toward aroma-recovery technology, recognisable wine brands, lower-sugar formulations and year-round retail placement beyond Dry January.

Table of contents

List of tables

List of figures

Executive summary

The global non-alcoholic wine market reached USD XXX billion in 2024 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe held XX% of 2024 revenue, supported by established dealcoholisation capacity, broad grocery distribution and harmonised EU wine rules, while Asia-Pacific will record the fastest regional CAGR at XX%. Sparkling wine generated the largest product-style share at XX%, reflecting its strong fit with celebrations, premium hospitality and adult social occasions. Investment is moving toward aroma-recovery technology, recognisable wine brands, lower-sugar formulations and year-round retail placement beyond Dry January.

Indicator	Value
Market size 2024	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global non-alcoholic wine revenue reached USD XXX billion in 2024 and will reach USD XXX billion in 2031.
- The market will add USD XXX billion of annual revenue between 2024 and 2031 at a XX% CAGR.
- Europe accounted for XX% of global market value in 2024, equivalent to USD XXX billion.
- Asia-Pacific will expand at a XX% CAGR through 2031, the fastest pace among the five regions.
- Sparkling formats generated XX% of 2024 value, ahead of still white wine at XX%.
- Products labelled XX% represented XX% of market value as precise zero-alcohol positioning gained shelf space.
- Glass bottles retained XX% of revenue, while cans will grow fastest at a XX% CAGR.
- Off-trade channels represented XX% of sales, including a XX% share for supermarkets and hypermarkets.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Non-Alcoholic Wine Market Trends and Growth Drivers

Non-alcoholic wine is moving from a substitute category into a distinct branch of the global wine economy. Its growth is occurring while conventional wine volumes contract, indicating that producers are responding to a structural reallocation of drinking occasions toward moderation, portion control and alcohol-free participation.

Technology and route to market now determine competitive performance. Producers that preserve volatile aroma, rebuild mouthfeel and control sweetness can charge premium prices, but commercial scale also requires permanent grocery placement, effective online education and credible by-the-glass availability.

The category's next phase will be defined by segmentation rather than simple awareness. Consumers are distinguishing among XX% and residual-alcohol products, still and sparkling formats, everyday and provenance-led labels, and bottles versus portable single serves. These distinctions will shape margin pools, investment priorities and acquisition targets through 2031.

Growth drivers

Moderation becomes an everyday behaviour (+2.5% on CAGR)

Consumers are alternating between alcoholic and non-alcoholic drinks across weekdays, meals, work events and social occasions rather than making a permanent binary choice. This expands the addressable market to existing wine drinkers and supports year-round replenishment instead of concentrating demand in January.

Dealcoholisation technology closes the sensory gap (+2.1% on CAGR)

Low-temperature vacuum evaporation, spinning-cone columns, membrane separation and aroma recovery are improving varietal expression and texture. Better liquid quality raises trial-to-repeat conversion and enables producers to sustain premium price points.

Mainstream wine brands validate the category (+1.7% on CAGR)

Portfolio extensions from Freixenet, Josh Cellars, Giesen, FRE and ARIEL give retailers familiar brands with proven supply and promotional support. Their entry reduces consumer search costs and moves non-alcoholic wine into conventional wine aisles and national hospitality accounts.

Modern retail expands physical availability (+1.4% on CAGR)

Supermarkets are widening permanent alcohol-free assortments, while specialist platforms provide education, mixed cases and nationwide discovery. Greater availability improves conversion at the point of occasion and lowers the cost of trial for emerging brands.

Sparkling unlocks premium social occasions (+1.2% on CAGR)

Sparkling non-alcoholic wine maps naturally to celebrations, aperitifs, gifting and event service, where consumers accept higher unit prices. The format also tolerates sensory changes from alcohol removal better than many still red wines because acidity and carbonation restore structure.

Inclusive hospitality broadens on-trade demand (+0.9% on CAGR)

Restaurants, hotels, airlines and event operators are replacing basic soft-drink alternatives with adult, food-compatible options. Curated by-the-glass programmes increase visibility and create an important sampling channel for premium brands.

Restraints

Sensory performance remains uneven (-1.8% on CAGR)

Alcohol removal can reduce aroma intensity, body, length and tannin integration, with the challenge most visible in still red wine. Weak first experiences suppress repeat rates and make quality variation across brands a category-wide commercial risk.

Specialist processing raises cost (-1.1% on CAGR)

Dealcoholisation equipment requires capital, technical expertise and sufficient production runs, while smaller wineries often ship liquid to contract processors. Added processing, aroma reconstruction and packaging costs compress margins at entry-level price points.

Regulatory definitions fragment global portfolios (-0.8% on CAGR)

Thresholds and permitted terms for alcohol-free, non-alcoholic, dealcoholised and partially dealcoholised wine differ across jurisdictions. Producers must adapt formulations, labels, registrations and distribution practices, slowing multi-country launches.

Sugar and processing perceptions constrain wellness positioning (-0.6% on CAGR)

Some formulations use residual sugar or flavour reconstruction to compensate for lost body and aroma. Consumers drawn by health and calorie reduction compare labels closely, creating pressure for lower-sugar liquids without sacrificing mouthfeel.

Non-Alcoholic Wine Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Moderation becomes an everyday behaviour	XXX	XXX	XXX
Dealcoholisation technology closes the sensory gap	XXX	XXX	XXX
Mainstream wine brands validate the category	XXX	XXX	XXX
Modern retail expands physical availability	XXX	XXX	XXX
Sparkling unlocks premium social occasions	XXX	XXX	XXX
Inclusive hospitality broadens on-trade demand	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Sensory performance remains uneven	XXX	XXX	XXX
Specialist processing raises cost	XXX	XXX	XXX
Regulatory definitions fragment global portfolios	XXX	XXX	XXX
Sugar and processing perceptions constrain wellness positioning	XXX	XXX	XXX

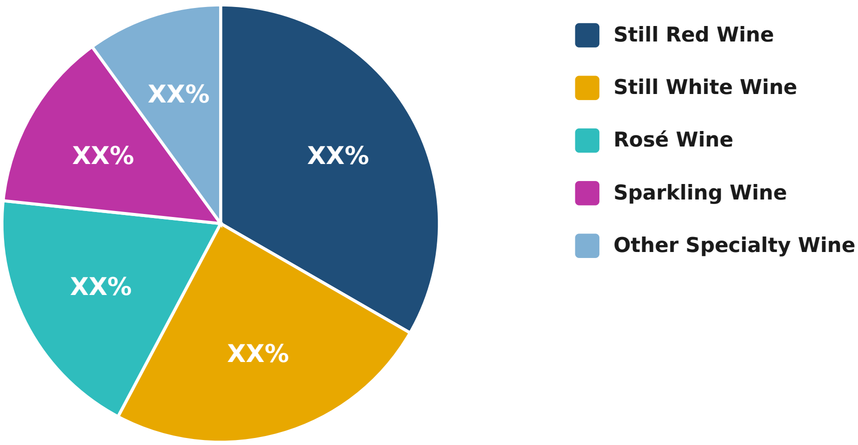
Source: XXX

Non-Alcoholic Wine Market Segmentation Analysis

By Product Style

Sparkling wine benefits from carbonation, acidity and celebration cues that support both sensory performance and premium pricing. Still white wine ranks second, led by Sauvignon Blanc, Chardonnay and aromatic varieties that retain freshness after processing. Still red will improve as texture-restoration technology advances, while rosé gains from warm-weather, aperitif and lifestyle positioning.

Value share by product Style, 2024



Source: XXX

Value by product Style, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Still Red Wine	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Still White Wine	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Rosé Wine	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sparkling Wine	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Specialty Wine	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Alcohol Level

Exact XX% positioning provides a direct proposition for driving, pregnancy, workplace, religious and fitness occasions. Products containing more than XX% but no more than XX% retain an important role where low-level residual alcohol supports process economics or flavour. Formulation investment and clearer frontlabel communication will continue shifting value toward XX%.

Value by alcohol Level, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
0.0% ABV	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 0.0% to 0.5% ABV	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Glass remains dominant because it communicates wine authenticity, protects quality and fits established retail and restaurant service. Cans are expanding from a small base through single-serve spritz, outdoor, travel and portion-controlled occasions. PET and cartons compete mainly on portability, cost and lower transport weight, while small glass formats provide a premium route to moderation.

Value by packaging, USD bn

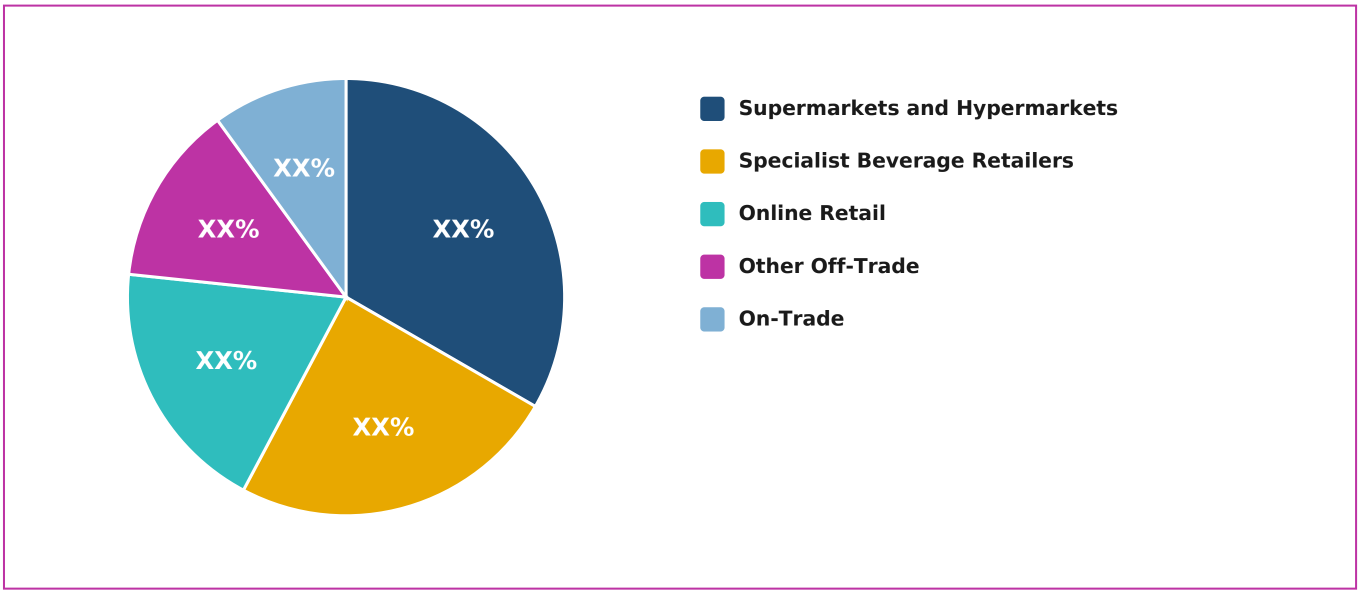
Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Glass Bottles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cans	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
PET Bottles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cartons	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets and hypermarkets provide the volume base through national listings, promotional visibility and adjacency to conventional wine. Specialist beverage retailers remain important for discovery and staff education, while online retail offers the widest assortment and efficient mixed-case purchasing. On-trade will outgrow the market as restaurants, hotels and event venues establish credible adult non-alcoholic menus.

Value share by distribution Channel, 2024



Source: XXX

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Supermarkets and Hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialist Beverage Retailers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Off-Trade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
On-Trade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

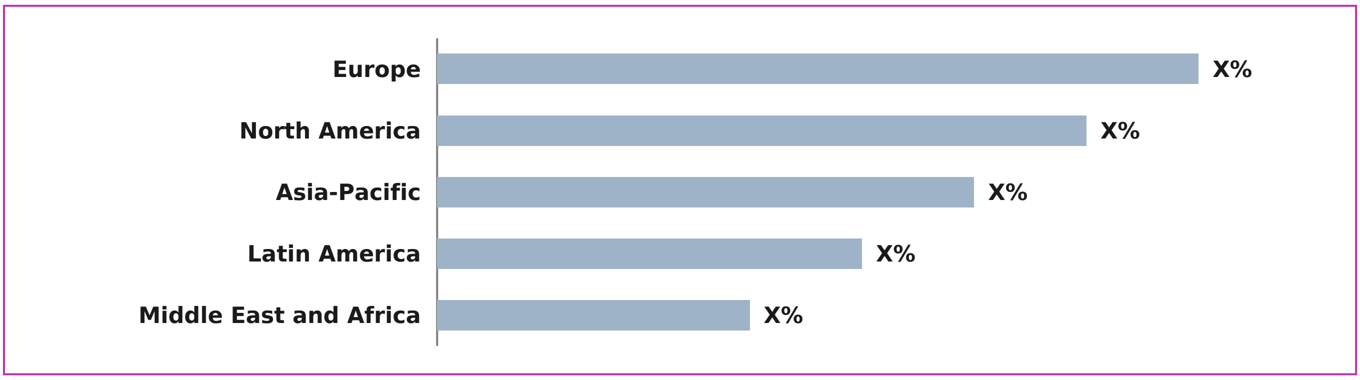
Non-Alcoholic Wine Market Regional Analysis and Country Outlook

Europe generated XX% of global revenue in 2024 and remains the centre of production expertise. Germany, Spain and France combine established wine infrastructure with specialist dealcoholisation capacity, while the United Kingdom and Nordic markets provide high-value demand through supermarkets, specialist retailers and sophisticated moderation occasions. EU recognition of dealcoholised wine has strengthened the commercial framework for investment, labelling and cross-border portfolio development.

North America accounted for XX% of value, led overwhelmingly by the United States. National launches from established wine labels are accelerating mainstream distribution, and premium sparkling, Sauvignon Blanc and Chardonnay are gaining space beyond dedicated alcohol-free shops. Canada contributes a smaller but attractive market shaped by provincial retail systems, wellness-oriented urban consumers and strong imported-brand participation.

Asia-Pacific will grow at a XX% CAGR through 2031. Australia and New Zealand provide advanced wine production, brand development and export capability, while Japan, South Korea, China and India add consumer scale and new meal-pairing occasions. The Middle East and Africa also offer targeted opportunity for products meeting local zero-alcohol requirements, although terminology, certification and route-to-market structures require country-level execution.

Growth rate by region, 2024-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2024	2031	Share 2024	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Non-Alcoholic Wine Market Competitive Landscape and Company Share

The market is moderately concentrated: the ten leading suppliers generated XX% of 2024 value, leaving substantial space for regional wineries, premium specialists and private labels. Henkell Freixenet, Schloss Wachenheim, Trinchero Family Estates and Les Grands Chais de France combine production scale with broad European or North American distribution, while Giesen, Oddbird, Pierre Chavin and Thomson & Scott have built focused category identities.

Competition is shifting from basic alcohol removal toward liquid engineering and provenance. Leaders are investing in aroma recovery, lower-temperature processing, residual-sugar control, varietal communication and packaging that can sit credibly beside premium wine. Sparkling portfolios are expanding fastest because they provide stronger sensory structure and access to celebratory price points.

Strategic activity is broadening through brand extensions, minority investments, distributor partnerships and contract-processing alliances. Large wine groups supply national retail reach, while specialist brands bring consumer education and faster innovation. The strongest portfolios will combine trusted wine credentials, multiple price tiers, reliable production and a disciplined route into both grocery and hospitality.

Leading companies

Company	HQ	Est. revenue 2024	Market share 2024	YoY
Henkell Freixenet	XXX	XXX	XXX	XXX
Schloss Wachenheim	XXX	XXX	XXX	XXX
Trinchero Family Estates	XXX	XXX	XXX	XXX
Les Grands Chais de France	XXX	XXX	XXX	XXX
Giesen Group	XXX	XXX	XXX	XXX
Australian Vintage	XXX	XXX	XXX	XXX
Pierre Chavin	XXX	XXX	XXX	XXX
Oddbird International	XXX	XXX	XXX	XXX
Thomson & Scott	XXX	XXX	XXX	XXX
Weingut Leitz	XXX	XXX	XXX	XXX
J. Lohr Vineyards & Wines	XXX	XXX	XXX	XXX
French Bloom	XXX	XXX	XXX	XXX

Source: XXX

Global Non-Alcoholic Wine Market Forecast and Opportunities

Global revenue will increase from USD XXX billion in 2024 to USD XXX billion in 2031. The category will progressively separate into accessible supermarket labels, premium vineyard-led wines and occasion-specific sparkling or single-serve propositions. Average selling prices will remain firm as liquid quality and packaging improve, although scale and contract processing will reduce unit production costs.

The base forecast assumes sustained retail expansion, continued technology gains and wider restaurant adoption. An accelerated scenario, driven by faster mainstream-brand conversion and regulatory alignment, places 2031 revenue above USD XXX billion; a slower scenario shaped by weak repeat rates and consumer spending pressure places it near USD XXX billion.

Winning companies will treat non-alcoholic wine as a distinct product-development discipline rather than a residual extension of conventional wine. Success will depend on preserving aroma, rebuilding texture, controlling sweetness and matching format to occasion. Companies that secure permanent shelf placement and on-trade trial while communicating origin and varietal character will capture the largest share of incremental value.

Opportunities

- Premium varietal wines with traceable vineyard provenance
- Single-serve cans and small-format bottles for portion-controlled occasions
- Restaurant wine lists, event venues, airlines and corporate hospitality
- Lower-sugar XX% sparkling wine
- Localised products for Muslim-majority and alcohol-restricted markets
- Contract dealcoholisation and aroma-recovery services for regional wineries

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.