Industry Report

July 2025

Image: Chapel Down

Key Figures

1,100+ Vineyards

~240 Wineries

10.7m bottles

Exports up 35%

+3% overall sales growth

90% of producers to hire in the next 3 years

FTE roles to increase by 21% by 2028

Chardonnay most planted variety

Introduction

Sam Linter, WineGB Chair

Showing our resilience

2024 proved that despite tough farming, political, and economic conditions, the UK domestic wine sector is resilient. We continued to grow sales and production which is a huge testament to the incredible work of the thousands of growers, winemakers, sales teams and the many other individuals supporting the development of the sector.

This includes the work of the small and incredibly dedicated WineGB team who I have been proud to work with as Chair for these past four years. As I stand down in August, I can reflect on the changes that have occurred over the years. I leave leading an organisation that is laser focused on addressing the core sector challenges. As a trade association, our unique ability is to use our collective voice so the sector can make wine and sell wine. Through the delivery of a range of category-wide activities, we support our production and sales needs by enhancing and protecting our reputation with Government and the media. WineGB has played a key role in supporting the industry's success and has developed a three-year strategy to promote the sector as it enters its next phase of growth.

Congratulations to all – we have made it through 2024, and we come out much stronger as a result.

Production

In keeping with wine-producing regions across Northern Europe, 2024 proved to be a trying year. We saw inclement weather and recurrent rainfall resulting in higher disease pressure.

Wine production in France fell by 23% compared to 2023, and dropped by 46%, 38%, 29%, and 12% in Champagne, Burgundy-Beaujolais, Loire, and Bordeaux respectively with reports of lower sunshine levels, excess rainfall, mildew, and botrytis (Agreste 2024). Volumes were also reduced in Austria (-9% on 2023), Germany (-6% on 2023), and Switzerland (-20% on 2023), with global wine production decreasing by 2% compared with 2023 (OIV 2024).

Production was down on the record volumes achieved in 2023 and the updated figures for total active hectarage show volumes were higher than originally estimated at just under 10.7 million bottles (FSA Wine Team 2025). While the average yield was the lowest since 2016, the growth in plantings in the last decade has resulted in 2024 being the fourth largest harvest overall, behind 2023 (21.6m), 2018 (13.1m), and 2022 (12.2m).

Despite the relative size of the harvest, the quality of the grapes and concentration of fruit flavours have been widely praised by winemakers. While it is a smaller vintage, it is certainly one that will be in high demand.

A challenging environment

Since its peak in July 2024 consumer confidence has fallen and has not yet recovered (Statista June 2025). The hospitality industry is a mixed picture and, since the 2024 Budget, has lost 69,000 jobs – three times that seen in the wider economy. This is a massive change as 2023 saw the creation of 18,000 new jobs (UK Hospitality). As wine sales are highly reliant on people meeting and sharing the good times, this environment makes it more challenging to grow.

Additionally, we face a swathe of particularly punishing political choices that hit producers' bottom line. Before a bottle is sold, we are impacted by the increase in employers' National Insurance contributions, the roll out of Extended Producer Responsibility fees, and increases in alcohol duty. Our rate of duty is the third highest in the world and the largest for a sector with a domestic market. Coupled with this has been changes to Agricultural Inheritance Relief and Business Property Relief that affect our vineyards, many of which have diversified their offering into retail and hospitality and are family businesses that are being, or have already been, passed down through the generations.

This is exacerbated by cut-backs in Government. As a category we have seen minimal financial support for exports from the Department of Business and Trade. Our core department, the Department for Environment, Food, and Rural Affairs, faces an average annual reduction of 2.7% in resource spending over the next three years following the latest Comprehensive Spending Review. The Foreign, Commonwealth and Development Office and the Department of Culture, Media and Sport also face cuts (HM Treasury).

We simply want to be able to compete on level playing field. It's especially essential as a new sector competing against established, in some cases centuries ago, competitors from old markets.

Sales results

We remain one of the most on-trend wine categories in the world, as a result of the incredible quality of our products. We are winning an increasing number of international awards, as shown through the WineGB Golden 50 Wine List of the national and international gold medal winners of 2024, whittled down from over 100 top awards presented to UK wines in the year.

This quality and increasing brand awareness is behind the **3% overall sales growth.** Sales of still wine grew by 10% in 2024 in part aided by higher production volumes in 2023 resulting in more wine available for sale. Sales of sparkling wine have remained level which is a considerable achievement in a year that saw Champagne shipments to the UK fall by 13% and overall sales of Cava drop by 13.4%.

People

As the Director of Wine for Plumpton College, I am particularly interested in how we look after our ever-growing workforce. It is with reassurance that 90% of the sector are planning to hire in the next three years. As they continue to invest in their people we have worked with WineGB to help drive interest with potential employees and have highlighted the opportunities in our industry in the first ever National Wine Careers Week.

We note that with wine tourism as the newest and most exciting sector in hospitality, many of the new roles are expected to come from the cellar door. There is huge value for producers in diversifying beyond wine to offer a full tourism experience and this results in increased consumer engagement, brand loyalty, and sales. As such we anticipate a further 21% rise in full-time equivalent roles by 2028.

Methodology

Content for this report has been principally sourced from data provided by the Food Standards Agency Wine Team as well as the results from the WineGB Industry Survey 2025. The Industry Survey is sent to both members and non-members of WineGB and captured the equivalent of 90% of production. For more information on methodology, please see the final page of this report.

Acknowledgements

Considerable thanks to all of the members of the sector who have spent time sharing their data with WineGB to be able to collate this industry snapshot. It is a full team effort at WineGB and a particular thanks to Mark Laughton, Data Analyst, Phoebe French, Communications Manager, Emma Rix, Sustainability Executive, and Sophie Wright, Member and Team Executive.

Looking to the future

We are not out of the woods yet. We would benefit from state support, lowering barriers to trading, and directly supporting sales and production through grants. We are at a disadvantage when compared to the vast majority of the world's Governments who understand the need to invest in growth when making a market. This data shows that, despite the challenges, we have strong foundations and we are poised to take advantage when confidence improves. I remain confident that we are in a good position with a supportive WineGB aiding impressive people in our sector.

Hectarage and Planting

Image: Gusbourne

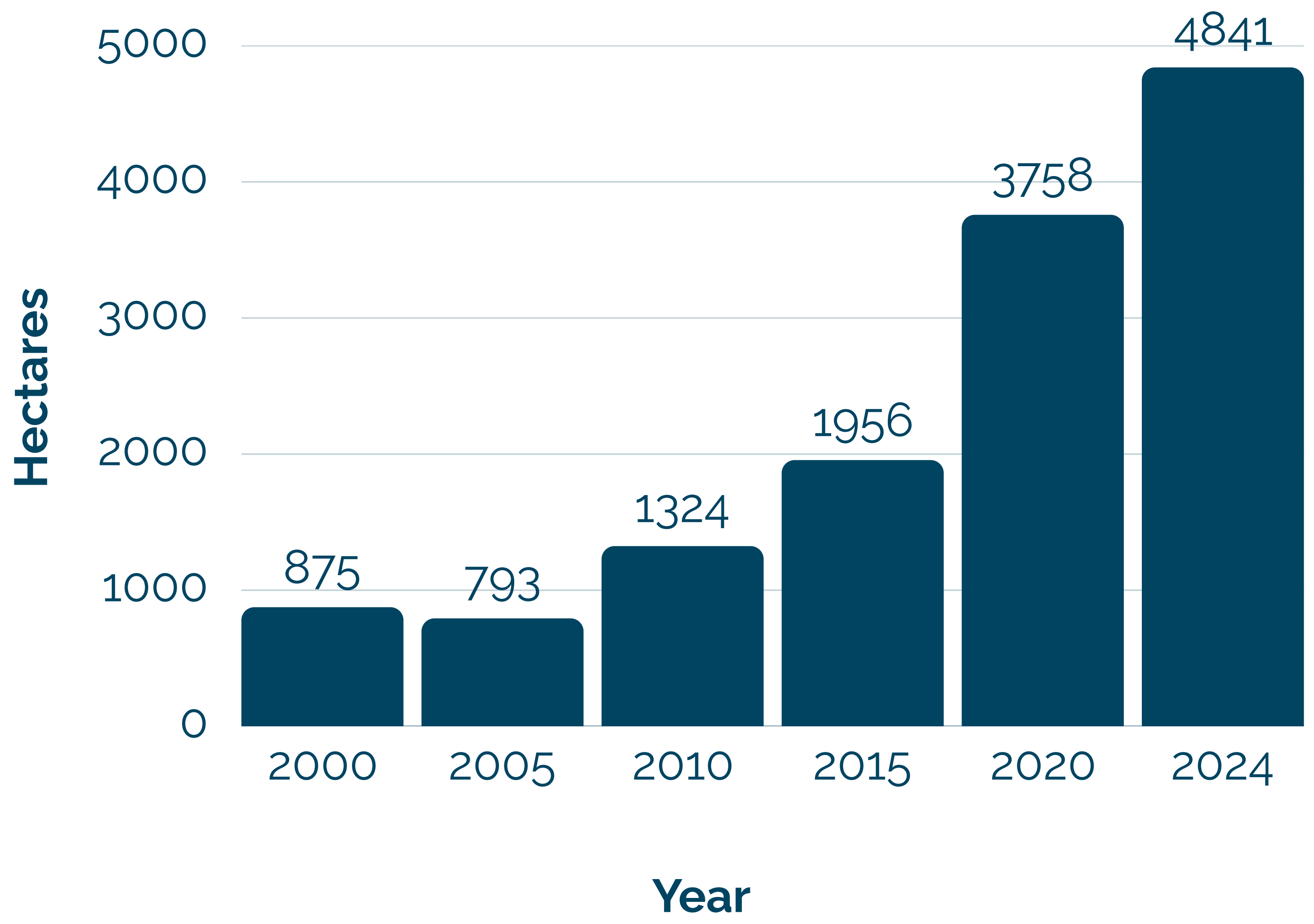
Hectarage and Planting

1,104 vineyards +74

238 wineries +25

Hectarage and plantings

- 4,841 hectares under vine
- 3,763 hectares in active production
- 982 hectares non-productive
  - *Recently planted and not yet producing commercial crop*
- 96 hectares planted with hobby (non-commercial) and abandoned vines



Planting growth

- Plantings up 510% since 2005

Source: Food Standards Agency Wine Team

Hectarage and Grape Varieties

Most planted grape varieties	
1. Chardonnay – 1,498ha	6. Solaris – 117ha
2. Pinot Noir – 1,370ha	7. Pinot Gris – 80ha
3. Pinot Meunier – 411ha	8. Reichensteiner – 65ha
4. Bacchus – 334ha	9. Rondo – 64ha
5. Seyval Blanc – 123ha	10. Pinot Blanc – 54ha

Source: Food Standards Agency Wine Team.

Figures are rounded to the nearest whole number. The Government's latest data by region and variety states that total hectarage is 4,581ha. This has now been adjusted to 4,841ha, however an updated breakdown of region and grape variety plantings with this higher figure has not been provided. Therefore, there will be a discrepancy in the figures provided above.

By country

- England – 4,489.78ha
- Wales – 91.4ha

Fun fact: There are now **99 different grape varieties planted in the UK,** including 37ha of Sauvignon Blanc, 8ha of Gamay, 4.5ha of Albariño, 3ha of Merlot, and 2ha of Riesling. There are even small plantings of varieties such as Cabernet Sauvignon, Cabernet Franc, Chenin Blanc, Gewürztraminer, Grenache, Marsanne, Nebbiolo, Pinotage, Savagnin, Syrah, Tempranillo, and Viognier.

By county

1. Kent – 1,239ha
2. West Sussex – 671ha
3. Essex – 469ha
4. East Sussex – 461ha
5. Hampshire – 426ha
6. Surrey – 130ha
7. Dorset – 97ha
8. Gloucestershire – 78ha
9. Devon – 87ha
10. Suffolk – 76ha

Regional Breakdown

Top three varieties by region

East

1. Pinot Noir (218ha)
2. Chardonnay (144ha)
3. Bacchus (117ha)

Midlands and North

1. Solaris (32ha)
2. Pinot Noir (31ha)
3. Seyval Blanc (21ha)

South East

1. Chardonnay (974ha)
2. Pinot Noir (793ha)
3. Pinot Menier (268ha)

Thames and Chilterns

1. Chardonnay (46ha)
2. Pinot Noir (42ha)
3. Bacchus (12ha)

Wales

1. Pinot Noir (15ha)
2. Solaris (13ha)
3. Chardonnay & Seyval Blanc (12ha)

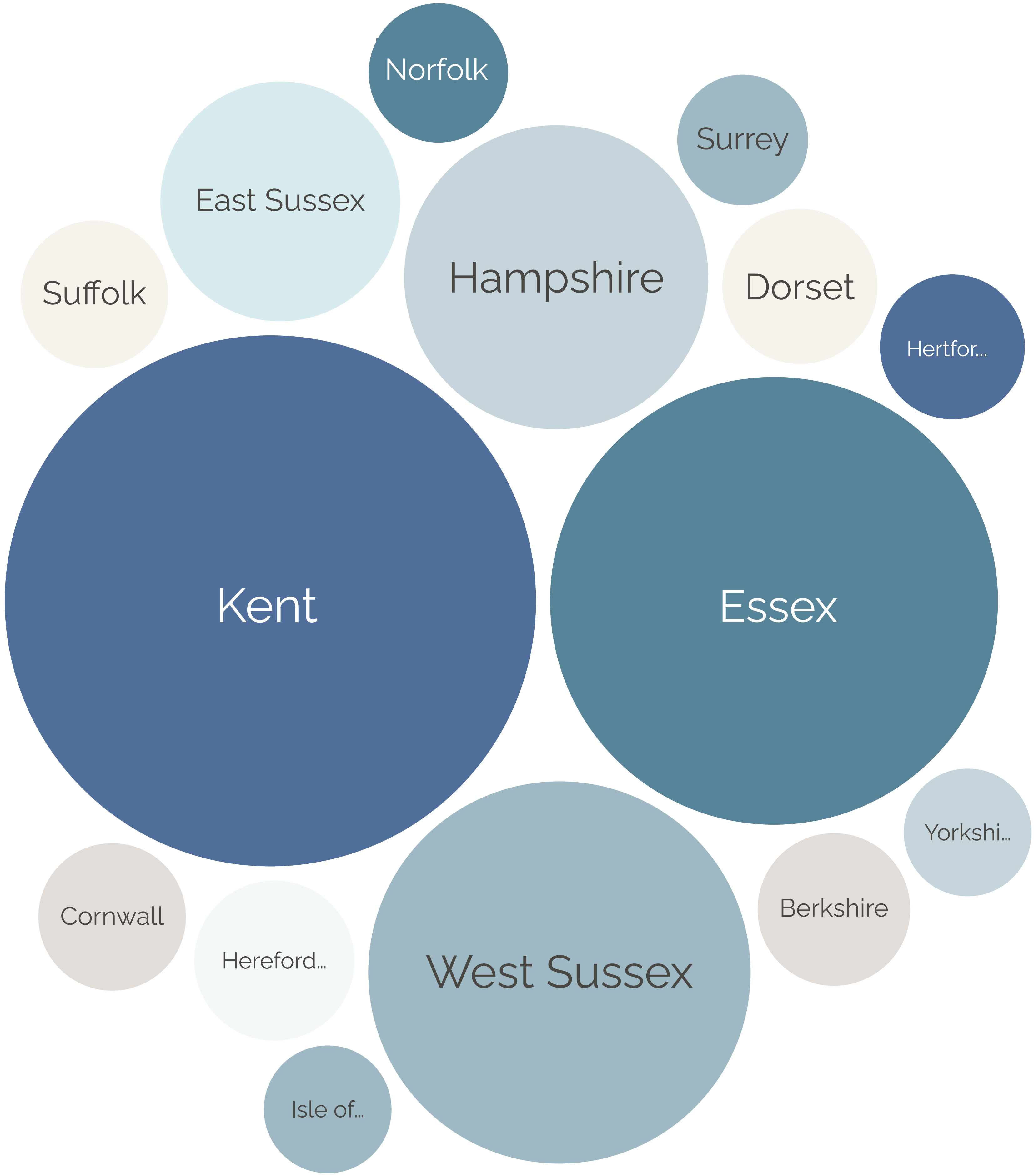
Wessex

1. Chardonnay (270ha)
2. Pinot Noir (176ha)
3. Pinot Meunier (73ha)

West

1. Pinot Noir (93ha)
2. Chardonnay (41ha)
3. Seyval Blanc (37ha)

Source: Food Standards Agency Wine Team



Largest plantings in the last five years:

1. Kent (363ha)
2. Essex (258ha)
3. West Sussex (188ha)
4. Hampshire (119ha)
5. East Sussex (74ha)
6. Herefordshire (33ha)
7. Dorset (31ha)
8. Berkshire (30ha)
9. Suffolk (28ha)
10. Cornwall (28ha)
11. Hertfordshire (27ha)
12. Norfolk (25ha)
13. Surrey (22ha)
14. Isle of Wight (21ha)
15. Yorkshire (20ha)

Source: Food Standards Agency Wine Team

Production

Image: Balfour

Production

2024 saw just under 10.7m bottles produced (80,077.42 hectolitres), higher than originally estimated due to more up-to-date figures for active hectarage now provided by the Government.

Due to the challenging conditions in 2024, the average yield of 21.3hl/ha was the lowest since 2016, however the increase in vineyard area means that overall volume was still the fourth highest in the last 10 years.

In terms of style, the sparkling vs. still wine split was more in line with the long-term average, with a relatively higher percentage of still wine production compared with 2023. Traditional method remains the principal sparkling wine production method representing 91% of all sparkling wine, the same as 2023. There was a higher proportion of still rosé wine made in 2024 (25%) up from 20% in 2023.

Year	Bottles (m)	Sparkling	Still
2019	10.5	72%	28%
2020	8.8	64%	36%
2021	9.0	68%	32%
2022	12.2	68%	32%
2023	21.6	76%	23%
2024	10.7	69%	31%

Source: Food Standards Agency Wine Team and WineGB Industry Survey 2025

Type	Bottle Equiv.	% of Total	Vs. 2023
Sparkling	7,328,000	69	-53%
Still	3,333,000	31	-43%
Other	16,000	<0.5	-50%
TOTAL	10,677,000	-	-51%

Method	Bottle Equiv.	% of Total
Traditional	6,647,000	91
Charmat/Tank	486,000	6
Carbonation	180,000	2
Other	34,000	<0.5

	Bottle Equiv.	% of Total
Still White	1,984,000	60
Still Rosé	849,000	25
Still Red	469,000	14
Other Still	31,000	1

Sales and Distribution

Image: Penn Croft

Sales Overview

+3%
sales growth

Total sales for 2024: 9.1m bottles up +3% overall on 2023

6.2 million
bottles of sparkling wine

2.9 million
bottles of still wine

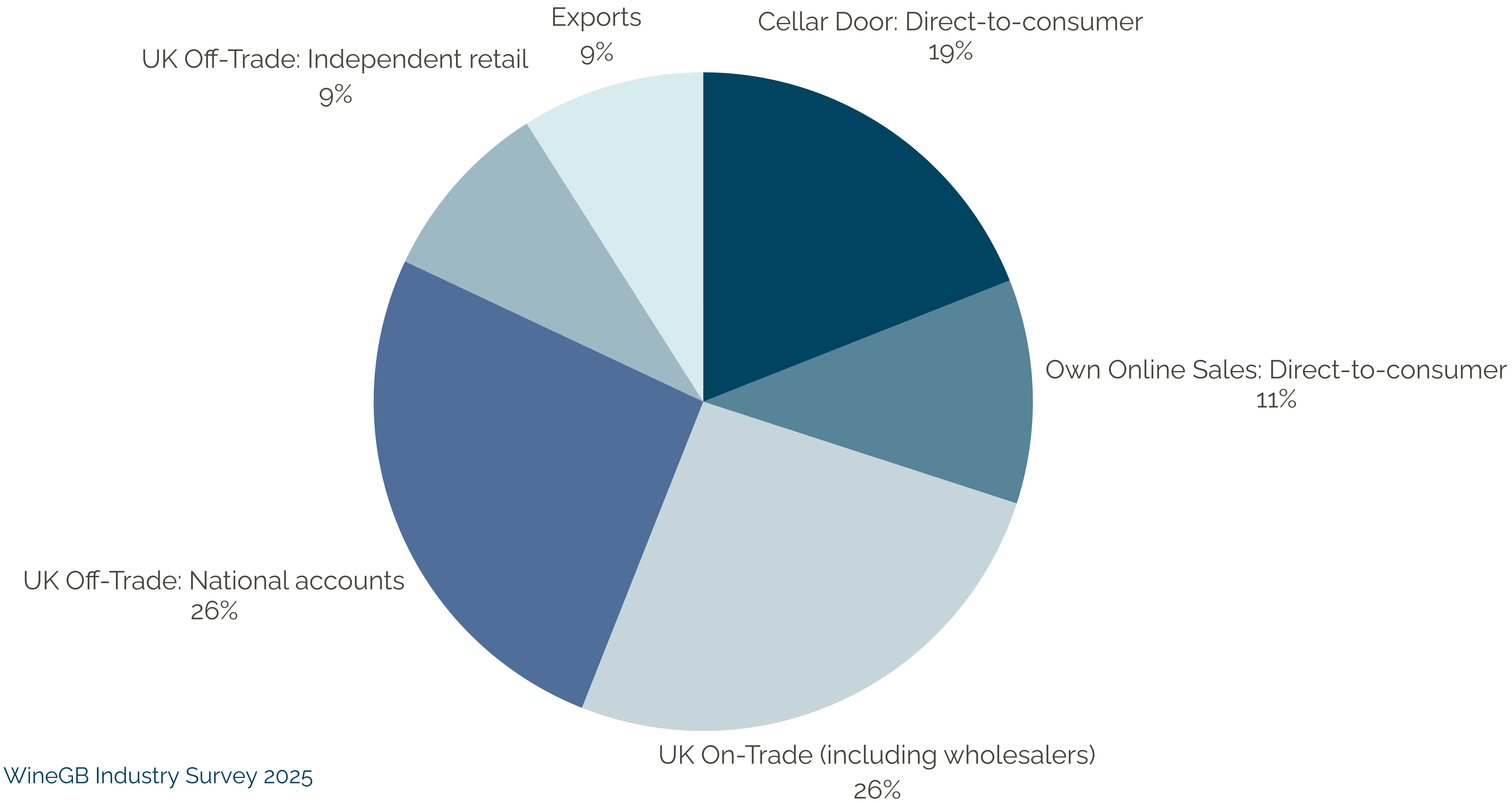
Sales are still dominated by a small number of large producers, with just 24 accounting for 88% of sales in the WineGB Industry Survey.

Sparkling wine sales maintained last year's volumes, a positive outcome in the wake of reductions in sales within other sparkling wine categories.

Still wine sales experienced a 10% growth in 2024, in part due to the higher production volumes in 2023 with more wine available for sale.

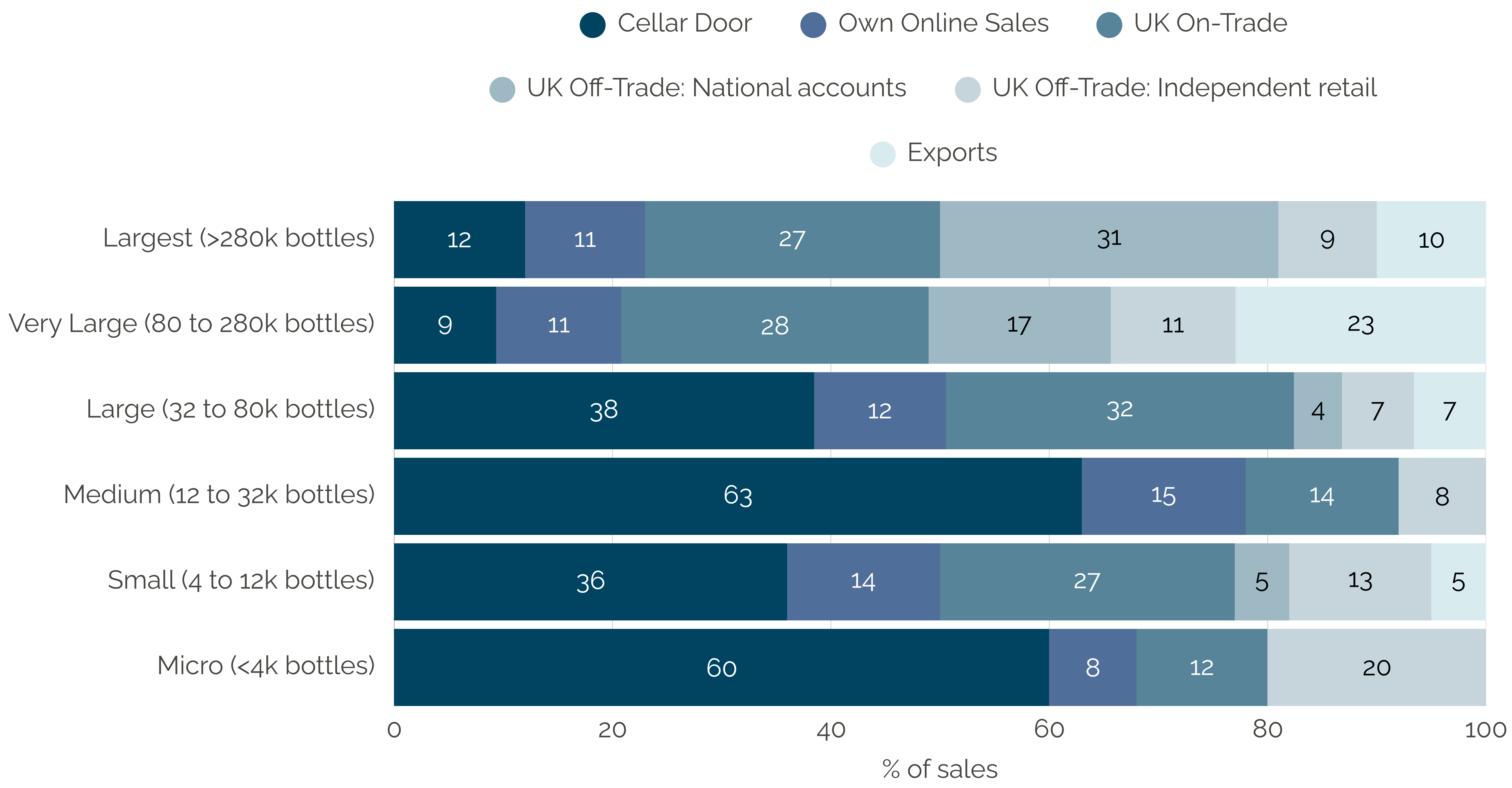
Source: WineGB Industry Survey 2025

Sales Channels



Source: WineGB Industry Survey 2025

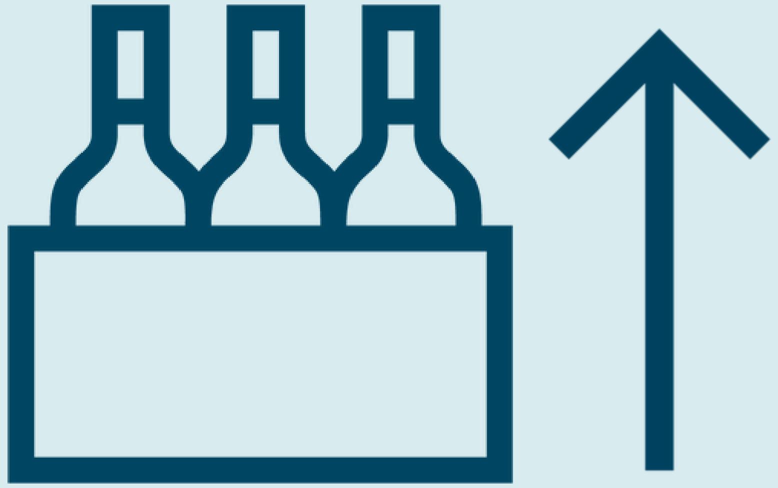
Sales Channel Split by Producer Size



Source: WineGB Industry Survey 2025

Sales Channels: Changes in 2024

Cellar door sales saw a small decline for the second consecutive year, but direct-to-consumer sales still account for 30% of total sales.



2024 saw a rise in sales through independent retail from 6% in 2023 to 9% in 2024.

Exports volumes grew 35% to now account for 9% of total sales.

Source: WineGB Industry Survey 2025

Channel Split by Producer Size

Larger producers continue to be less reliant on direct-to-consumer sales, with a higher percentage of trade sales and growing export volumes.

Medium and small producers remain reliant on direct-to-consumer sales as well as local on-trade and independent retail.

Source: WineGB Industry Survey 2025

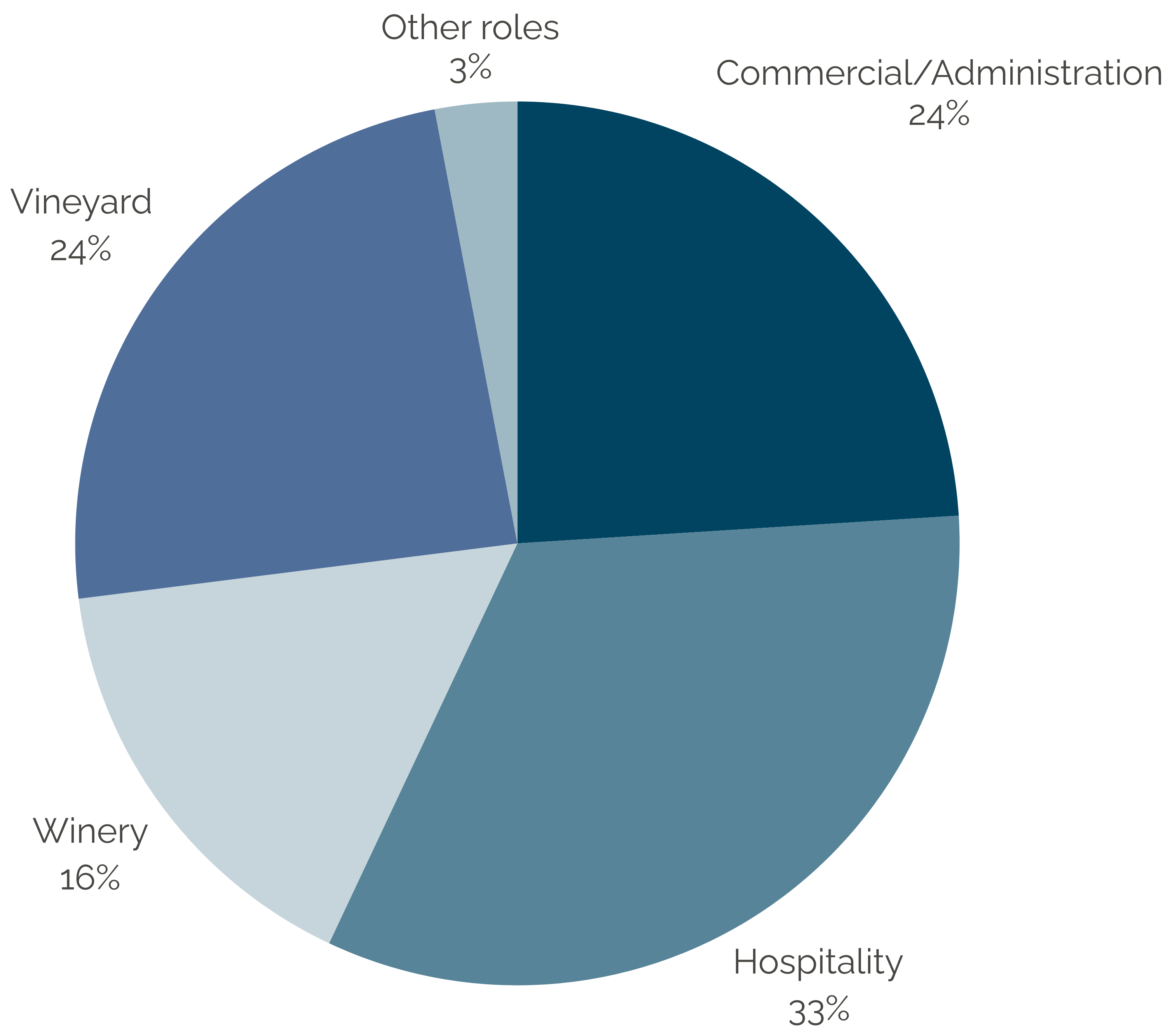
Employment

Image: Breaky Bottom


Image: Davenport

Employment

2024 Breakdown: Full-time equivalent roles



2024

- The industry now has 3,300 full-time equivalent (FTE) roles, with hospitality seeing the biggest increase.
- There are 13,000 people employed in seasonal temporary positions.

Hiring intentions

By 2028:

- 90% of respondents to the WineGB Industry Survey expect to increase their full-time equivalent positions resulting in a 21% rise in full-time equivalent roles.

Source: WineGB Industry Survey 2025 and past data.

Sources and Methodology

Image: Dunesforde

Sources and Methodology

Planting, hectarage, and some production data is sourced from the Food Standards Agency Wine Team.

Sales and employment data as well as production by style and method is sourced from the WineGB Industry Survey, with data from past years used to make comparisons. This year there were over 130 separate entries representing 90% of production.

Sales data is cross-referenced with other external data sources where available. Data for total UK sales is extrapolated from those respondents who replied to these questions and a comparison of like-for-like data from previous years. Due to survey response rates, there is an overall margin of error of +/- 400,000 bottles.

Image: Blackbook

Questions?

Contact office@winegb.co.uk

Image: Chapel Down