



**NEW ZEALAND
TRADE & ENTERPRISE**
Te Taurapa Tūhono

2025 WINE OUTLOOK

Trends and Insights in Taiwan

GREATER CHINA MARKET RESEARCH

MAY 2025

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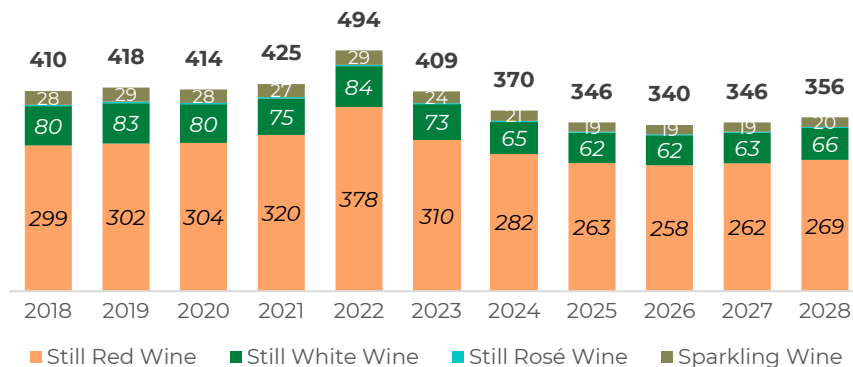
EXECUTIVE SUMMARY

- **Wine consumption** continued to decrease in 2024, while it is expected that the market is bottoming out and will return to steady growth in the near future.
- **Import wine** decreased by 9% in value, reaching USD 236 million. Most major wine import origins saw significant decrease, while New Zealand outperformed with 8% value increase and 21% volume increase.
- New Zealand wine holds a high-end position in Taiwan market. Most of the New Zealand wines locate in the premium and super premium price band, with Sauvignon Blanc being the dominant variety.
- **On-trade** wine consumption market share has decreased from 37% in 2018 to 31% by 2023, while modern retailers like hypermarkets and supermarkets have maintained stable market shares. There's a growing preference for smaller-scale retailers, and **specialist wine stores** are becoming increasingly significant as the primary distribution channel for wine in Taiwan.

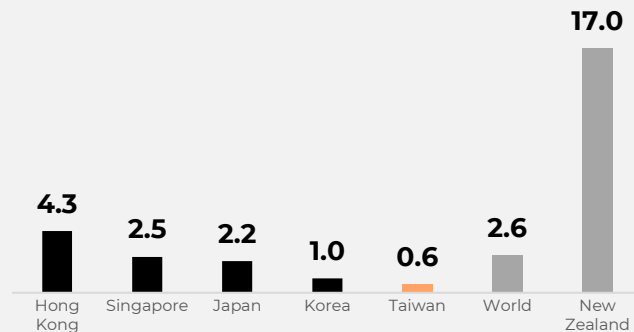
Wine market is bottoming out

- Taiwan wine market continued to decrease in 2024. The trend is expected to continue, while market is forecasted to bottom out in 2026 and return to steady growth.
- Per capita wine consumption in Taiwan remains relatively low comparing with world average and many other East Asia markets.

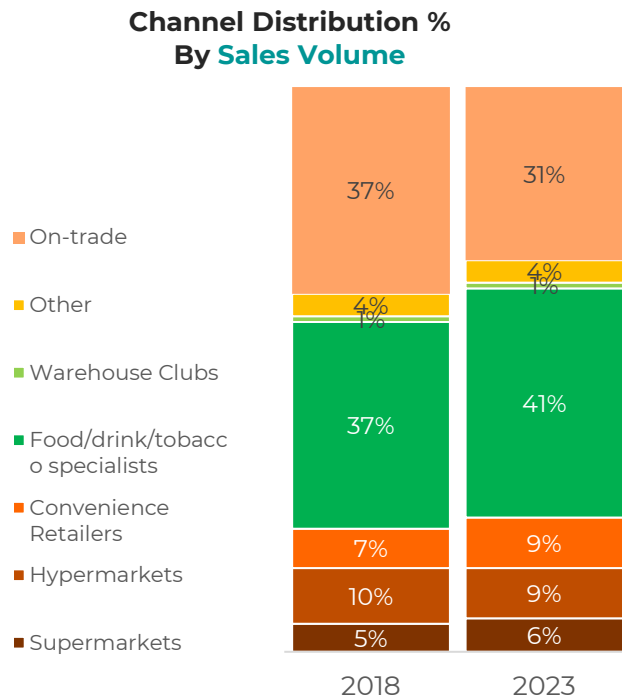
**Taiwan wine market size
(million USD) 2019 – 2028**



**Per Capita Consumption of wine
in litres per annum**



Wine distribution channel will remain relatively stable

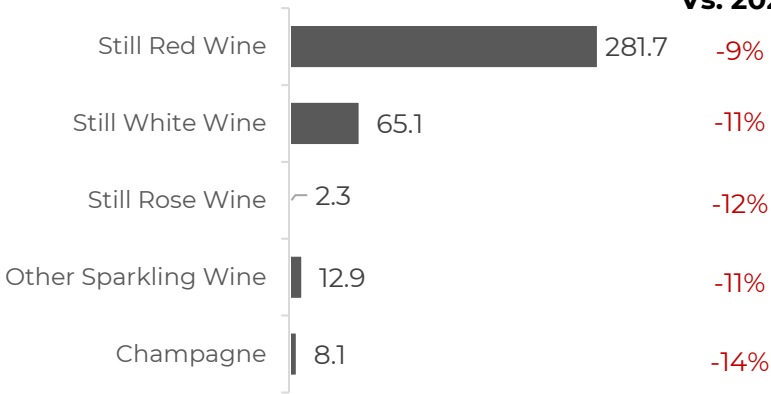


- On-trade channels remain a significant avenue for wine consumption in Taiwan, although their market share has gradually declined from 37% in 2018 to 31% in 2023.
- Channel share of modern retailers including hypermarkets, supermarkets, and convenience stores remained relatively stable, while there's a trend towards smaller scale retailers.
- Specialist wine stores are steadily gaining market share, making them the most important wine distribution channel in Taiwan.

Major types of wine consumption declined in 2024

- The major wine categories declined by nearly double digits in 2024, which led to an overall wine market decline of 9.6%.

Taiwan Retail Sales of Wine by Category in 2024 (USD million) Vs. 2023

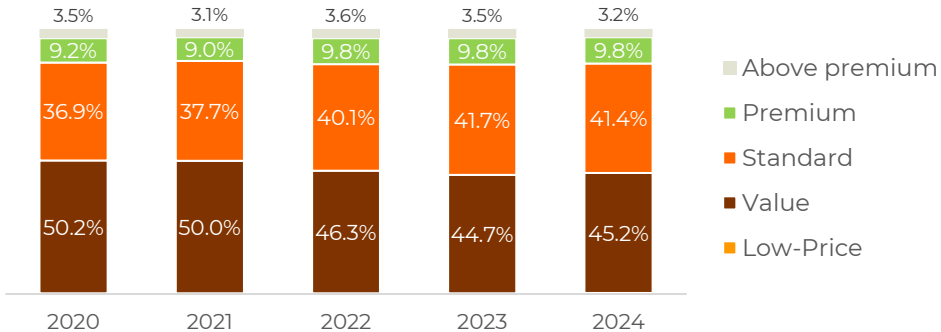


Still Red Wine origin	Ranking in 2024	Still White Wine origin	Ranking in 2024
US	1	France	1
Chile	2	Chile	2
France	3	Italy	3
Argentina	4	US	4
Spain	5	Argentina	5
Italy	6	Germany	6
Australia	7		
Ireland	8		
Portugal	9		

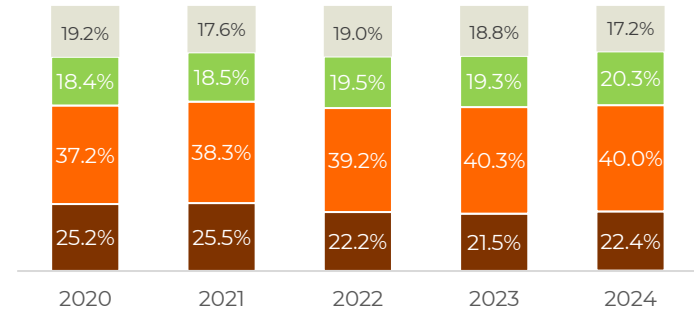
Mid- to high-end wine will continue to gain share

- Taiwan wine price band remained relatively stable. Value (TWD 157.51 to 262.50 per bottle) and Standard (TWD 262.51 to 637.50 per bottle) are the two major price bands, accounting for more than 85% of volume share and 60% of value share.
- Standard and premium priced wine are gaining market share in terms of both volume and value.

Taiwan wine **volume** share
by price band



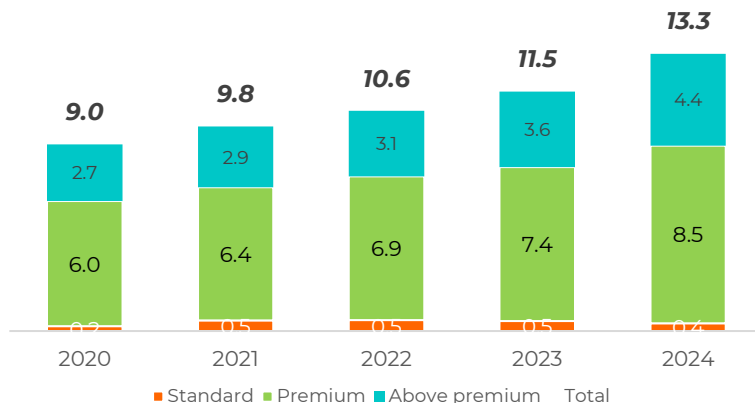
Taiwan wine **value** share
by price band



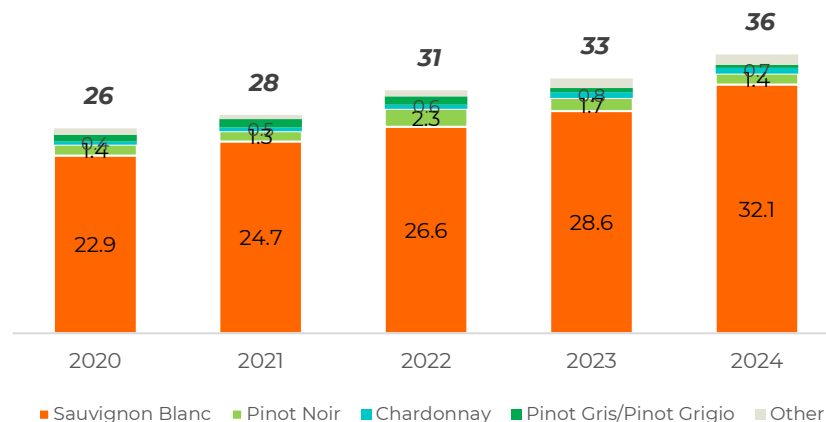
New Zealand in Taiwan wine market

- New Zealand wine holds a high-end position in Taiwan market. Most of the New Zealand wines locate in the premium and super premium price band.
- Sauvignon Blanc is the dominating variety for New Zealand wine. Pinot Noir, Chardonnay, and Pinot Gris are other major varieties with smaller quantity.

New Zealand wine in Taiwan market
Value by price band (million USD)



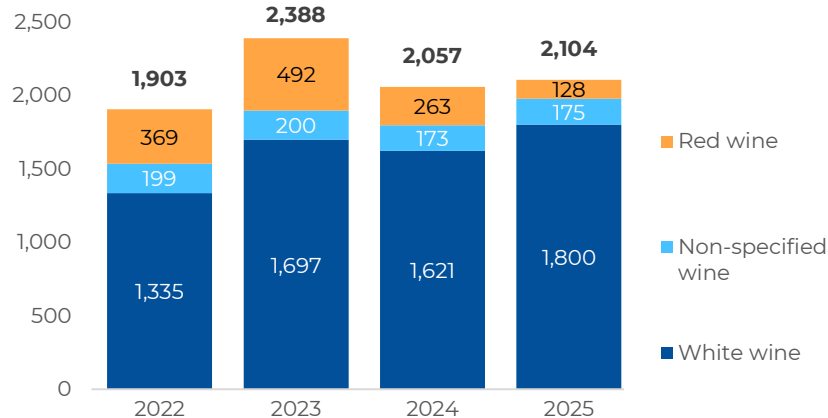
New Zealand wine in Taiwan market
Volume by variety (000 9L cases)



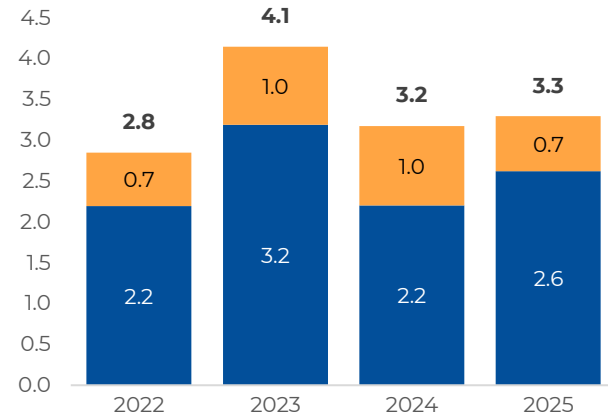
New Zealand wine export to Taiwan

- In terms of value, New Zealand wine exports increased marginally by 2.3% in year-ending March 2025, totalling NZD 2.1 billion. Exports to Taiwan increased by 3.8%, reaching NZD 3.3 million.
- White wine continues to be New Zealand's dominant export wine category. Similarly, 80% of wine export to Taiwan are white wine.

NZ Export to **World Value, HS2204**
2022 to 2025 YE Mar (NZD Mn)



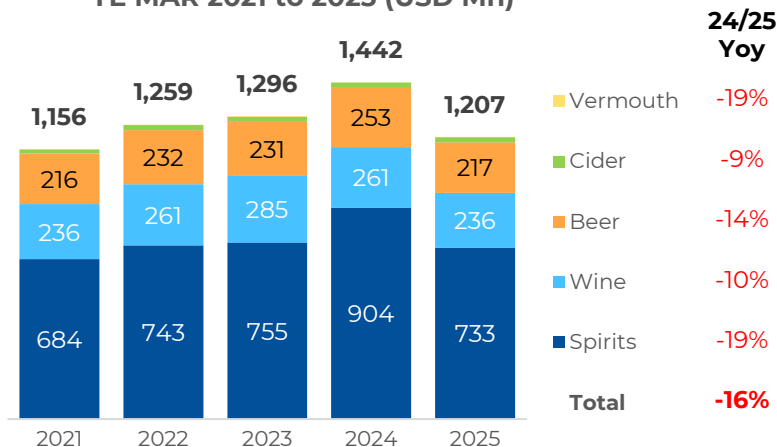
NZ Export to **Taiwan Value, HS2204**
2022 to 2025 YE Feb (NZD Mn)



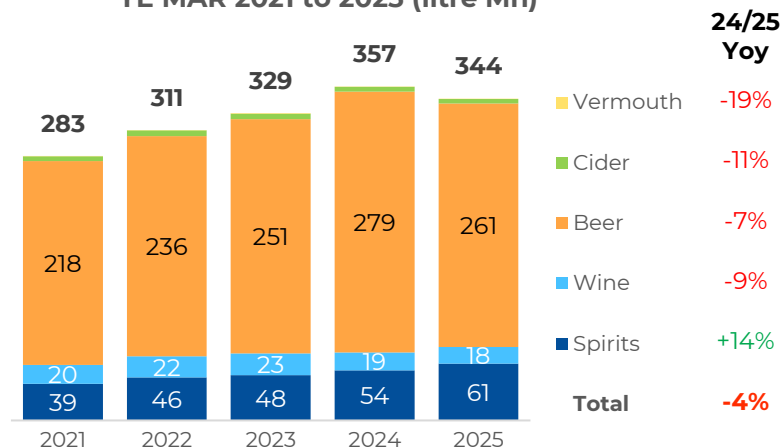
Taiwan alcohol import decrease

- Taiwan's imported alcoholic beverage market recorded a significant decline of 16% in value for the year ended March 2025, reaching USD 1.2 billion. Import quantity decreased slightly by 4%.
- Spirits and wine are the top two import categories. Spirits import decreased by 19% in value and increased by 14% in quantity, while wine import decreased by 10% in value and 9% in quantity.

**TW import value of alcoholic beverages
YE MAR 2021 to 2025 (USD Mn)**



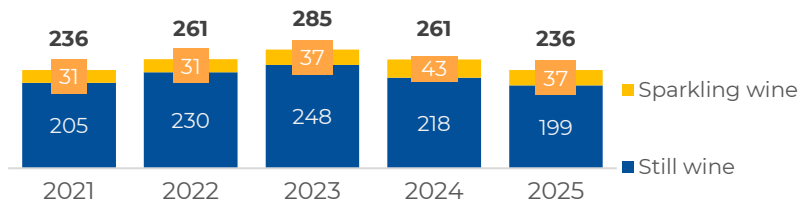
**TW import quantity of alcoholic beverages
YE MAR 2021 to 2025 (litre Mn)**



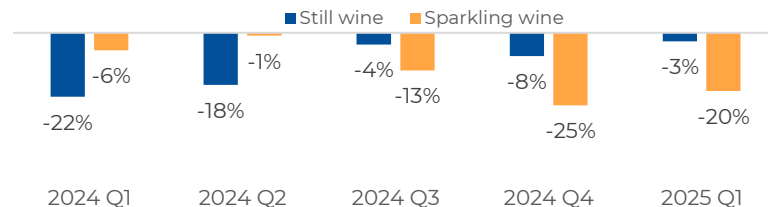
Taiwan wine import decrease

- Import Still wine decreased by 9% in YE Mar 2025 and import sparkling wine decreased by 15%.
- The average unit price for imported still wine rose from 12.3 USD/L to 12.2 USD/L, and unit price of import sparkling wine decreased from 29.5 USD/L to 26.6 USD/L.

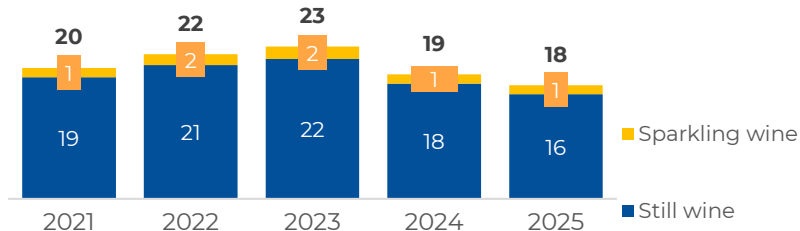
Taiwan Import wine value (USD Mn)



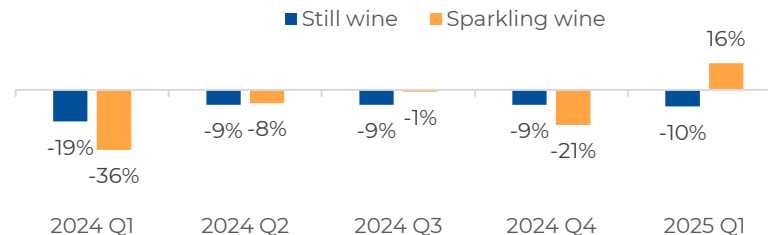
Quarterly Value Growth since 2024



Taiwan Import wine volume (Mn L)



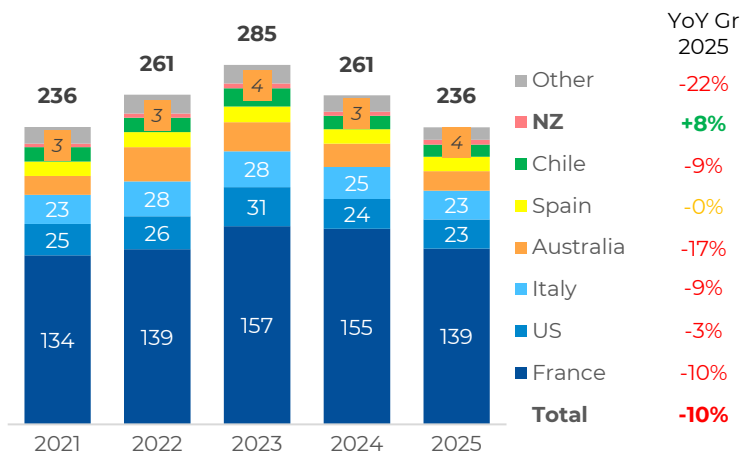
Quarterly Volume Growth since 2024



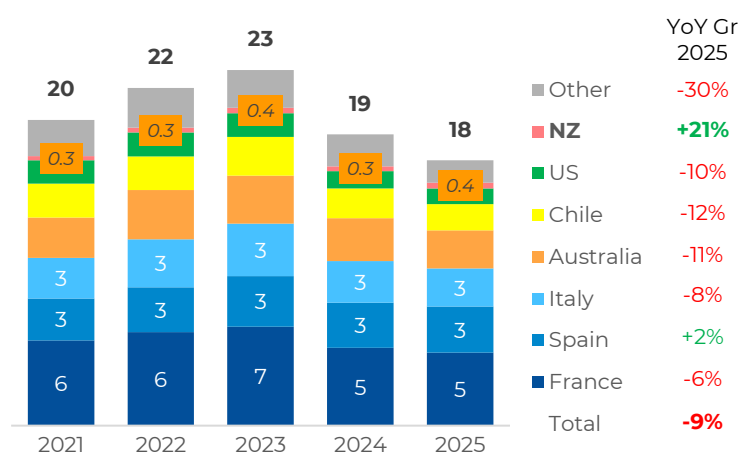
Taiwan wine import by country of origin

- Taiwan's total wine imports continue to decrease in YE Mar 2025. Import value decreased by 10% to USD 236 million, and import quantity decreased by 9% to 18 million litres.
- New Zealand ranked 7th in Taiwan wine import value, with 1.6% value share to reach USD 3.7 million.

Taiwan import value of wine by country
2021 – 2025 (USD Mn)

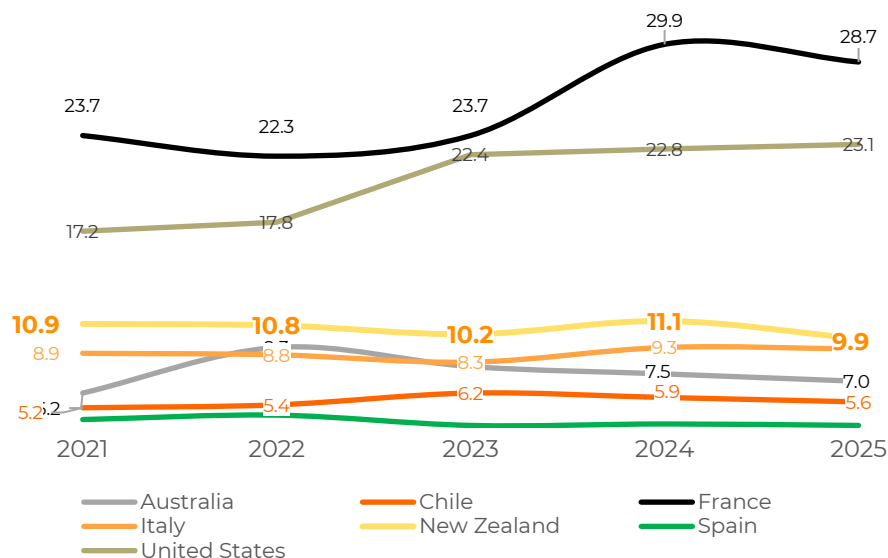


Taiwan import volume of wine by country
2021 – 2025 (Mn L)



Taiwan still wine (retail package) import price decreased slightly

Taiwan Import price, still wine, container ≤ 2L
2021 to 2025 YE Mar (USD/L)



- In YE Mar 2025, the average import price of wine in Taiwan decreased from USD 14.3/L to USD 14.0/L.
- Among major import origins, France and United States have significantly higher unit price than most other origins.
- The average import price of New Zealand wine decreased slightly from USD 11.1/L to USD 9.9 USD/L.

Taiwan consumers are drinking less alcohol

- There has been a downward trend in the Taiwan alcoholic drink consumption, from an average of 26.2 litre/capita in 2019 to 22.9 litre/capita in 2024. It is expected to continue decreasing to 21 litre/capita in the next five years.
- Beer is the largest category of alcoholic drink consumption, followed by Chinese/Taiwanese spirits (mainly sorghum spirits).
- Wine consumption decrease slightly from 0.3 litre/capita in 2019 to 0.4 litre/capita in 2024.
- The only increasing category in Ready-to-Drink (RTD) alcoholic drinks, especially spirit-based RTDs.

Taiwan alcoholic drinks consumption per capita (L/capita)

Volume per capita per year	2019	2024	2029f
Beer	22.6	20	18.4
Chinese spirit	1.4	0.9	0.9
Whiskey	0.7	0.6	0.5
Wine	0.8	0.6	0.5
Ready-to-Drink alcoholic drink	0.3	0.4	0.5
Other	0.4	0.4	0.2
Total alcoholic drink	26.2	22.9	21

Trends in Taiwan wine market

- **Reliance on Imports:** Taiwan continues to rely heavily on wine imports. While old world wines still dominate the market, their share is decreasing as new world wines gain popularity. This shift is driven by increasingly knowledgeable consumers seeking high-quality wines that offer good value.
- **Consumption Patterns:** Wine remains a social drink rather than a daily beverage for most Taiwanese. However, there is an increasing appreciation of wines and a strengthening wine-drinking culture. Observations also indicate a decreasing average age among wine consumers.
- **Preference for Red Wine:** Red wine is still the preferred style, but white wine consumption is on the rise. The younger generation is more experimental and open to options beyond traditional French wines, especially the French red wines.
- **Flavour Preferences:** Taiwanese drinkers prefer wines with softer, fruitier profiles and lower alcohol content. There is a growing demand for wines that align with local palates and pair well with Taiwanese cuisine.
- **Sales Channels:** Off-trade continues to dominate the market, with more retail chains, such as MY9, expanding their wine offerings. Supermarkets and hypermarkets, including PX Mart, are also broadening their wine selections. For on-trade, there is a noticeable increase in consumers seeking wine pairings in restaurants, particularly wines offered by the glass.
- **Impact of Free Trade Agreement:** The free trade agreement between New Zealand and Taiwan has enhanced the competitiveness of New Zealand sparkling wines in the Taiwanese market by eliminating the previous 20% import tariff. However, the challenge for NZ sparkling wines are PROSECCO and CAVA, which have comparatively lower FOB prices.

Suggestions for Success in Taiwan

- **Market Research:** Conduct thorough and insightful market research to inform strategic decisions. If budget permits, an in-person market visit is recommended to gain first-hand insights and validate findings.
- **Market Entry Strategy:** Develop a robust market entry strategy and a clear path-to-market business model—such as partnering with an in-market distributor or establishing a local branch office. Ensure that the chosen in-market partner or local importer has strong capabilities within the specific channels your brand is targeting (e.g., a distributor with strength in off-trade versus on-trade channels).
- **Positioning and Segmentation:**
 - Differentiate between retail and food service.
 - Position entry-level labels vs. flagship labels.
- **Education:** Engage consumers through seminars, tastings, and promotional events to build awareness and appreciation for your products. Consider potential collaborations with organisations such as the Taiwan Sommelier Association, for example, through co-hosted tasting events.
- **Sales Channels:** Avoid direct sales through channels that are not well-aligned with your brand positioning, with limited exceptions for high-volume, low-cost products in outlets such as Costco. Carefully plan your distribution strategy to ensure brand consistency and market fit. Strong enforcement of product market segmentation is highly recommended to maintain clarity and avoid channel conflict.



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