

Executive Summary

**SPECIAL REPORT FOR STRENGTHENING THE
INTERNATIONALISATION OF BUSINESSES – WINE & SPIRITS
PROJECT TEAM**

Executive Brief

Special Report for Strengthening the Internationalisation of Businesses : Beverages — Wine & Spirits

1. The strategic fact: the market is growing in value and shrinking in volume

The European wine market — the largest in the world — stood at 191,294.4 million USD in 2025 (+4.2% a year since 2020), while its volume fell from 14,612.5 to 13,759.2 million litres (–1.2% a year). On a 2020 base the value index stands at 122.7 and the volume index at 94.2: a gap of 28.5 points in five years, projected to continue to 2030 (220,321.6 million USD). The market rewards quality, not quantity — that is the fundamental strategic fact.

- Faster-growing segments: sparkling wine (43,040.0 million USD, +5.0% against +3.9% for still wine), low- and no-alcohol products, certified sustainable product.
- In spirits, Europe is the fastest-growing region of the five years (168,226.3 million USD, +7.0%) — not Asia.
- In customs value terms and for the three headings in scope (HS 2204, 2208 and 2205): total reference market (EU-27 and the UK) €26,949.6 million, target-market field (Germany and the UK) €8,704.7 million, Greek exports to the two markets €76.1 million and current penetration 0.87%. The realistically obtainable share is defined per business and product, indicatively €90 to 225 thousand per unit of the wine and spirits segment in cycle 2.
- The market is extremely fragmented (the top 4 account for 8.1% of volume): the small unit is a viable player provided it has a distinct identity.
- The same distinction holds for the Greek flows, and there it can be measured directly. Over 2019–2025 the export value of wine rose by 21.4%, coming almost entirely from average unit value (index 122.0) and not from quantity (99.5); in spirits the 36.9% increase breaks down into 6.6% quantity and 28.5% unit value. In 2025, however, the picture reversed for wine: the 1.7% fall in value came from a 12.2% rise in the quantity exported, fully offset by a 12.3% fall in unit value — more kilos, cheaper. That is exactly the movement the strategy must avoid, and the reason the indicator framework tracks the quantity index and the unit value index separately (Table B.4b).

2. The local reality: a zero export starting point — and a mechanism already available

In the ASDA territorial unit, beverage manufacturing (KAD 11) beyond the single large brewery (€315.1 million, outside the scope of SME support) numbers eleven micro businesses with a combined turnover of €8.0 million (2023) — none of them flagged as an exporter in the register. Verification of each unit's activity against GEMI (20 August 2026) established the composition of the base: the productive core — all the units producing goods of the vine and wine chain (classes 11.01, 11.02 and 11.04) — numbers six units with a turnover of €2.74 million net of the double registration (€5.15 million gross). The wine and spirits segment numbers four units — three distilleries (11.01) and one winemaking unit (11.02) — with just €333 thousand, while the aromatised wine segment has two connected units in Peristeri (class 11.04, heading HS 2205) with €2.41 million. The base also includes key downstream links: a unit providing alcohol bottling services (€1.55 million) and two wholesale traders of wine and spirits (€1.23 million) — €2.78 million in total, eight times the wine and spirits segment. The intervention therefore concerns the creation of export flows from zero, not the intensification of existing ones. A critical advantage: in the same municipalities the related food sector (KAD 10 — 70 businesses, €342.7 million) has eleven exporting businesses accounting for 43.3% of the sector's turnover: mature export experience, available as a mechanism for mentoring and joint representation. For the two aromatised wine units, the report also maps the market of heading HS 2205 in full (Tables B.5, B.5b, B.5c and B.6): small — 3.3%

of the corresponding EU-27 wine imports — but with the highest unit value of the three headings (€3.84 against €3.42 per kg for wine), with Germany as the leading import market and with Greek exports that increased fivefold over 2019–2025, from €0.07 to €0.36 million. That growth is growth in quantity from a minimal base (volume index 569.1) and not in price (unit value index 92.4), and the mirror shares remain first-entry magnitudes: 0.005% in Germany and 0.041% in the United Kingdom. It is a complementary export field rather than a target market in its own right — it is nevertheless fully included in the TAM and SAM.

3. Getting past the distributor: a thin margin, a scarce slot, a measurable price of entry

The report puts numbers on the link that stands between the producer and the shelf. The typical drinks distributor operates on a gross margin of ≈24%, an operating result of ≈3% and a net margin of ≈1.5%; it turns its stock over ≈8 times a year, collects in ≈25 days and applies a mark-up of 25–45% on the sale to retail — the shelf price sought must therefore survive being worked back to the ex-works price. Codes per warehouse have risen tenfold (from 300–400 to as many as 4,000) and the slot in the portfolio has become the scarcest resource: every new code justifies itself either by rate of turn or by margin, and the Greek SME's argument is by definition the second. Consequences for the design: the natural counterpart is the specialist importer of the quality segment and not the consolidated distribution group (the 50 largest control ≈80% of United States wine and spirits wholesaling); the trade support policy is the real price of entry into the portfolio; and counterparty risk is real even at the top — in August 2026 the second largest distributor in the United States entered reorganisation (Chapter 11), which makes a credit check before the first shipment and a clause barring automatic assignment of the contract the minimum measures of self-protection. (A United States sample — transferable as an indication of operational organisation, not as a European measurement.)

The supporting links of the chain also acquire a measurable shape. World demand for packaging machinery came to 64.1 billion USD in 2024, with a projection of 86.9 billion in 2029 (drinks: 13.0 → 17.4 billion); in Western Europe 11.8 billion, with Italy (Packaging Valley, Emilia-Romagna) leading in adaptable machines — a proximity that makes it easier to supply small lines, while the shallow second-hand market keeps the fixed-cost constraint intact. In labelling (Western Europe 1.6 billion USD, +6.2% a year) digital printing limits the fixed cost per print run — critical for small batches. Finally, Germany and the United Kingdom are also the two largest European food packaging markets — a finding that reinforces the need to adapt to their requirements — while the supply of glass containers is concentrated in a few large players: the small unit's answer is collective purchasing, not substitution of the material. It should be noted that the bottling link already exists locally (section 2), which makes contract cooperation an immediately available option for the core units rather than a theoretical possibility.

4. Targeting: Germany as the principal market, the United Kingdom as the secondary one

Germany is already the leading market for Greek wine (€25.10 million; a share of 1.02% of German wine imports and 2.30% of spirits), with no customs threshold; for the local base it is a first entry into a channel that already works. The United Kingdom offers structurally greater headroom (shares of 0.22% / 0.04%) but presupposes an administrative readiness that does not yet exist. The same ranking holds for spirits and is documented in its own right: European demand is growing at 7.0% a year, German imports under the heading come to €1,793.4 million and British imports to GBP 737.3 million, while the leading import market for aromatised wines is likewise Germany (22.7%) — all three headings in scope, that is, point to the same two markets. The two available directions for upgrading value: strengthening certified production — PDO/PGI at 36.4% of Greek production by volume, when in the EU 82.4% of the vineyard area is destined for PDO/PGI wines; the two figures have different measurement bases and indicate headroom, not a measured gap — and average unit value, which ranges from €6.83 per kilo in the United States to €0.73 in Italy, with €2.82 to Germany. The divergence reflects a different mix of product, packaging and sales channel and does not by itself allow a conclusion about the form of packaging; it does show, however, that an increase in export volume does

not necessarily mean an upgrading of value per unit. At the same time, documented sustainability is turning into a condition of access to the shelf (electronic label/QR from the 2024 harvest, the packaging regulation PPWR from 12 August 2026, stricter documentation of environmental claims). A separate regime applies to aromatised wines: labelling under Regulation (EU) 251/2014 and excise duty on intermediate products of €102 per hectolitre — about €0.77 a bottle, against zero for wine.

5. Skills: using the existing material and the new modules proposed

Through its digital library (business4extroversion.gr), the project already offers ten modules of asynchronous training material covering internationalisation horizontally. The report does not design a new programme: it matches the four bundles of need to the material available and delimits the sector-specific supplement. The export function (bundle A) and digital capability (C) rest on existing modules; the sector regulatory strand (B) is provided as a continuous updating service, because the framework changes every year; productive upgrading (D) is entirely new, sector-specific content with a research partner. The central mechanism: structured mentoring of each beverage unit by an exporting food business of the area (a six-month cycle), with a deliverable per bundle instead of hours of attendance.

6. The six policy measures

Measure	Horizon	Indicator of success
1. Activating the first export through a collective business mission	Cycle 1 — second half-year	A first recorded export by at least one unit of the core by the end of cycle 2, with priority to Germany — an indicative result target
2. Data extraction, networking and use of the Internationalisation Observatory	Cycle 1 — first quarter and continuous use	Number of businesses making use of market data and of the Observatory to target markets, buyers and B2B contacts
3. Collective infrastructure for compliance and documentation	Cycle 1 — continuous	Share of businesses with a complete compliance file
4. Digital presence and narrative of origin	Cycles 1–2	Businesses with an active channel and at least one period of observations
5. Positioning in high-growth segments and new product development	Cycle 2, in stages	New codes in sparkling, low-alcohol or certified sustainable products
6. Connection with inbound tourism	Cycle 2	Points of contact between the international visitor and the local product

Measures 1–4 show a positive or, at worst, neutral effect across all four scenarios of the report and make up the hard core for immediate implementation; measures 5–6 are launched in stages, as the early indicators clarify the environment. Priority in time goes to Measure 1: as long as export experience remains zero, the rest improve readiness without producing a result. Responsible bodies under the implementation plan (Table E.2): the Project Team (Measure 1); the businesses (Measures 2, 4, 5); ASDA and the Chambers of Commerce, with a certification body and a testing laboratory (Measure 3); ASDA with the municipalities and the gastronomy and tourism bodies of Attica (Measure 6).

7. Indicative targets for cycle 2 (orders of magnitude, not commitments)

Size	Baseline (2023/2025)	Indicative target for cycle 2
Units of the productive core with a recorded export	0 of 6 (classes 11.01, 11.02 and 11.04)	1 to 2
Units of the verified local chain with a recorded export	0 of 9	2 to 3
Export turnover of the core	0 euro	€0.2 to 0.5 million

Share of bulk and private label in the export volume	not applicable	up to one third (a ceiling, not a target)
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8. The leading risk and the answer to it

The risk is twofold: the structural contraction of alcohol consumption (world wine consumption –2.7% in 2025; the market capitalisation index of large producers 46% below its 2021 peak) and the possibility that the cost of compliance exceeds the capacity of the very small unit to absorb it. The answer is built into the design: a move towards the segments where value is rising (rather than competing on declining quantity) and collective production of compliance, so that the cost, which is fixed per business, becomes absorbable.

Source: ASDA, “Special Enriched Internationalisation Report — Beverages: Wine & Spirits”, current edition (August 2026). Measurement bases are not additive: market sizes in USD retail value (D&B Hoovers); exports, shares and unit values in EUR customs value of trade (Eurostat–Comext, HM Revenue & Customs); local figures in EUR corporate turnover. Unit value is not a price index: at four-digit heading level it is also affected by the composition of the mix. Full documentation and sources by figure: chapters 3–6 and Annexes A–C of the report. The activity class of the units of the local base comes from GEMI (Annex A.7).

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