

WINE LISTER LEAGUES
QUARTER-CENTURY SPECIAL EDITION
DECEMBER 2025



wineLISTER

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As we reach the end of 2025, we take this moment to look back at the first quarter century of the new millennium and the developments that have most positively shaped the wine world so far.

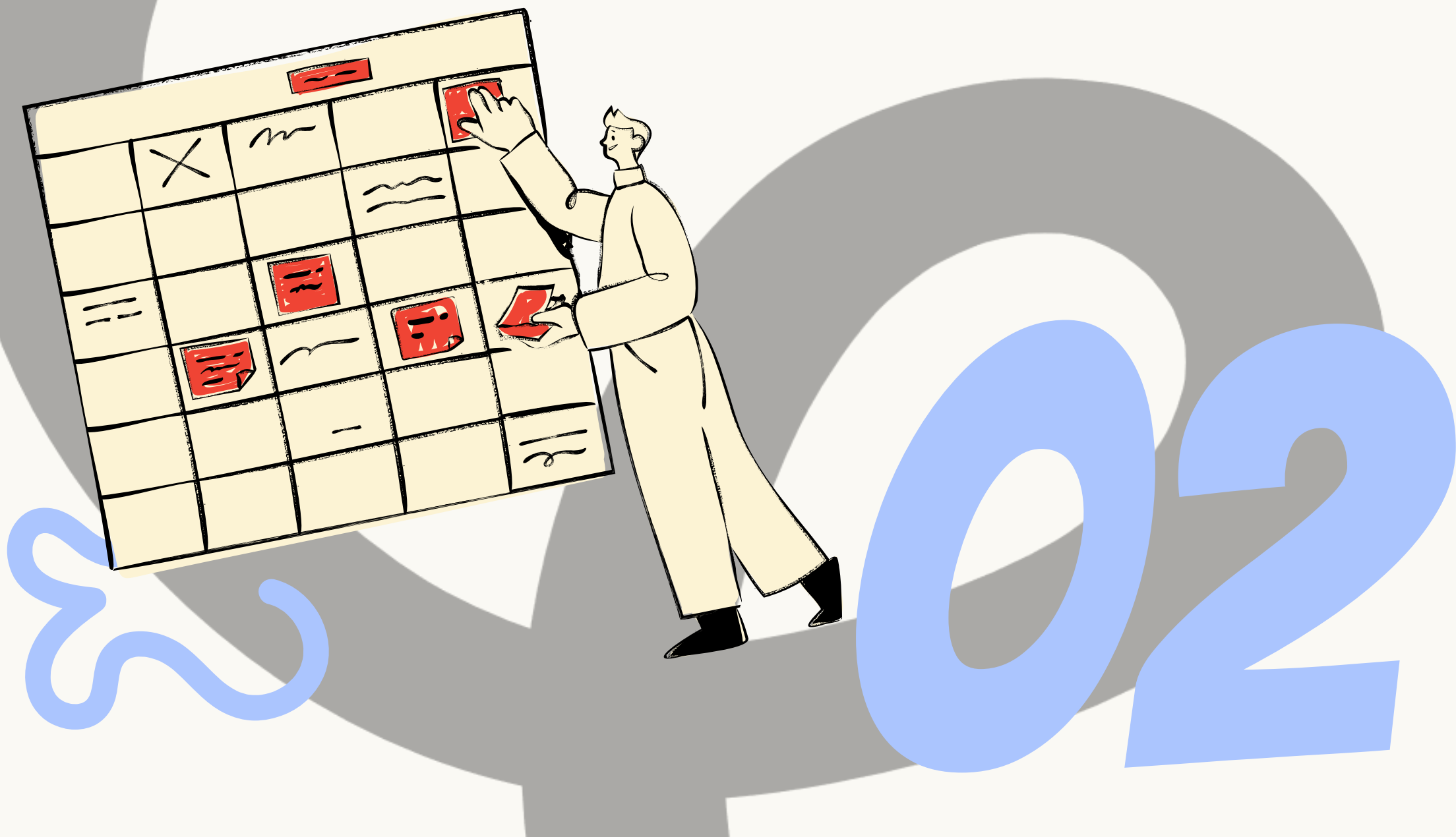
The study draws on insights from Wine Lister's sixth annual end-of-year global trade survey — this year gathering the views of 57 CEOs, MDs, and heads of wine departments representing well over one-third of global fine-wine revenues. The trade highlights the regions gaining momentum, opportunities producers can seize in 2026, and the tourism experiences defining global wine culture.

Together, these perspectives show an industry that continues to diversify, broaden, and adapt, while remaining anchored in cultural meaning and human connection.

— Ella, Tara, and Maggie

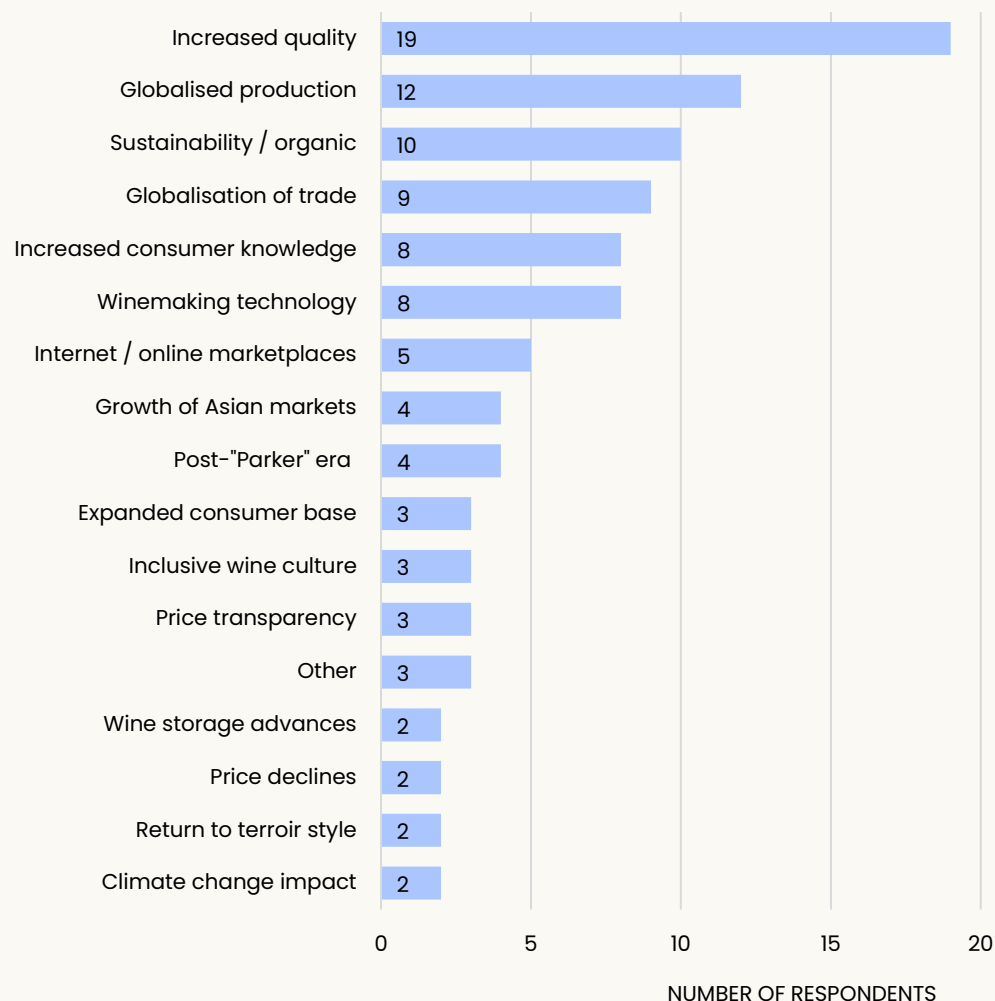
01

LOOKING BACK ON 2000-2025



POSITIVE DEVELOPMENTS

LOOKING BACK, WHAT'S BEEN THE MOST SIGNIFICANT POSITIVE DEVELOPMENT IN THE WINE WORLD OVER THE PAST 25 YEARS?



We asked this question as an open-ended question to avoid leading our 57 survey respondents, and have grouped free-text responses by theme.

Several of the 57 trade respondents believe that the quality of wine has improved everywhere over the past quarter-century:

"The global improvements made in viticulture, vineyard management, and winemaking across all corners of the world so that today, a great wine can come from almost any region on earth."

- **Specialist Americas merchant**

"The wider understanding that really great wine can come from beyond the most classic regions."

- **Top-tier UK merchant**

"A stylistic winemaking shift from big, alcoholic, 'Parkerised' wines and towards a global search for authenticity and terroir."

- **Top-tier UK merchant**

The rise of sustainable, organic, and regenerative practices (10 responses) also features prominently:

"Evolution of sustainable, regenerative and considered production practices and the development of a passion for these amongst trade, media and consumers."

- **Top-tier UK merchant**



POSITIVE DEVELOPMENTS CONT.

Another respondent comments on the expansion of consumer knowledge and wine culture, accelerated by online platforms and social media:

"Social media and the ease of information has radically improved understanding of wine and the regions."

- Top-tier UK merchant

Further comments were made on the increase in price transparency:

"Transparency within markets means that pricing is the most competitive it has ever been, offering clear value and offering peace of mind to the consumer. It's never been a better time to buy wine if you drink it."

- Specialist UK merchant

Outside of the major themes, other discrete comments included:

"Natural wine: less sulphite, a freer wine, and a greater acceptance of imperfections."

- Place de Bordeaux

"The surge in demand for Prosecco due to the Spritz phenomenon and, more broadly, the boom in demand for Italian wines."

- Place de Bordeaux

"Customers drinking wines that they like."

- Top-tier Asia merchant

WINE PERSONALITY OF THE CENTURY

WHO WOULD YOU NAME AS YOUR WINE PERSONALITY OF THE CENTURY (SO FAR)?

Out of the 32 people mentioned, we highlight the four that were mentioned more than once.

01 ROBERT PARKER, 13 MENTIONS

"He has changed the overall quality level of wines."
- **Top-tier Europe merchant**

"His scores determined the price like no-one else."
- **Top-tier UK merchant**

"His scoring system, newsletter, and role in increasing the influence of critics' reviews is still being felt today."
- **Specialist Europe merchant**

02 AUBERT DE VILLAIN, 6 MENTIONS

"For his inspirational stewardship of one of the wine world's emblematic estates, and for his work towards UNESCO World Heritage status for the Côte d'Or."
- **Top-tier UK merchant**

"Humility whilst leading the best of the best."
- **Specialist UK merchant**



WINE PERSONALITY OF THE CENTURY CONT.

03: NEAL MARTIN, 2 MENTIONS

"Approachable, highly knowledgeable and also interested in more than just wine."

- Specialist UK merchant

03: ÉMILE PEYNAUD, 2 MENTIONS

"He embodies modern viticulture."

- Top-tier Europe merchant

Four people believe that no single person could fully represent the last 25 years. As one top-tier Americas merchant puts it:

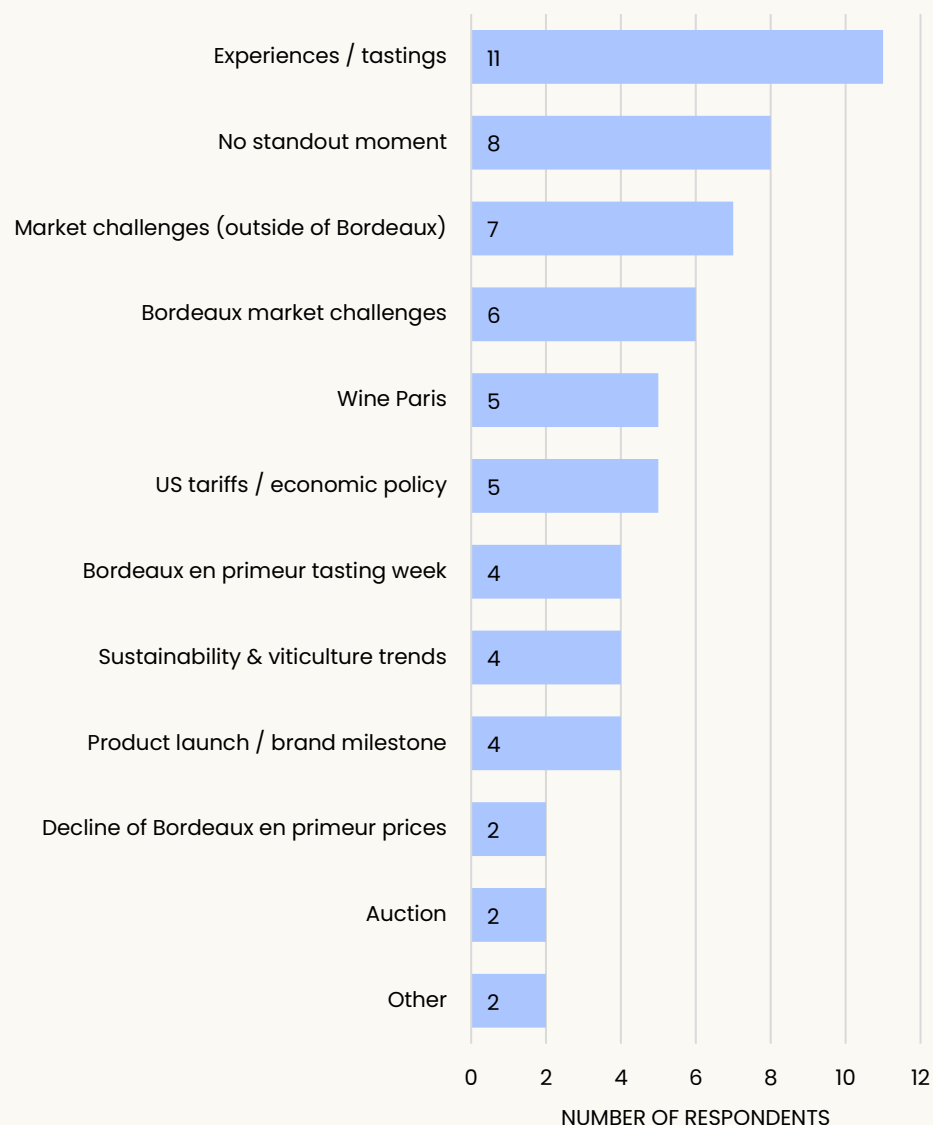
"The wine world has become truly global, so there is no one person with that much influence to command this recognition."

- Top-tier Americas merchant



STAND-OUT INDUSTRY MOMENTS

WHAT'S BEEN YOUR STAND-OUT INDUSTRY MOMENT OF 2025? AN EVENT OR EXPERIENCE THAT STOOD OUT?



We asked this question as an open-ended question to avoid leading our 57 survey respondents, and have grouped free-text responses by theme.

Experiences and tastings were most commonly cited for creating personal "high points:

"A sensational bottle of 1945 Graham's Vintage Port at lunch, with friends and colleagues, on 8th May 2025 (VE Day)."
- Top-tier UK merchant

"Lunch with Christian Moueix... It felt like a small return to a time in the wine industry which might be gone."
- Top-tier Americas merchant

Many respondents cited market challenges including distributor consolidation, changing demand dynamics, and policy developments:

"Massive decline in consumption."
- Specialist Europe merchant

"RNDC closing its doors in California. RNDC is the 2nd largest distributor in the U.S. and CA is the largest market in the U.S. The fact that a distributor this large can go out of business in a market this large is probably the most significant event since prohibition."
- Specialist Americas merchant

"Tariffs on wine to the USA: it is not unprecedented as the US has had tariffs before, but these are permanent and are based on the US government's overall economic strategy."
- Specialist UK merchant

STAND-OUT INDUSTRY MOMENTS CONT.

Wine Paris continues to be a key moment in the year, with several respondents highlighting its renewed relevance:

"Wine Paris: it has become the trade event the wine world needed."

- Top-tier Americas merchant

"This year signalled the switch from Prowein to Paris as the main hub for the international trade."

- Top-tier Europe merchant

A further two respondents commented on the drop in prices during this year's en primeur campaign:

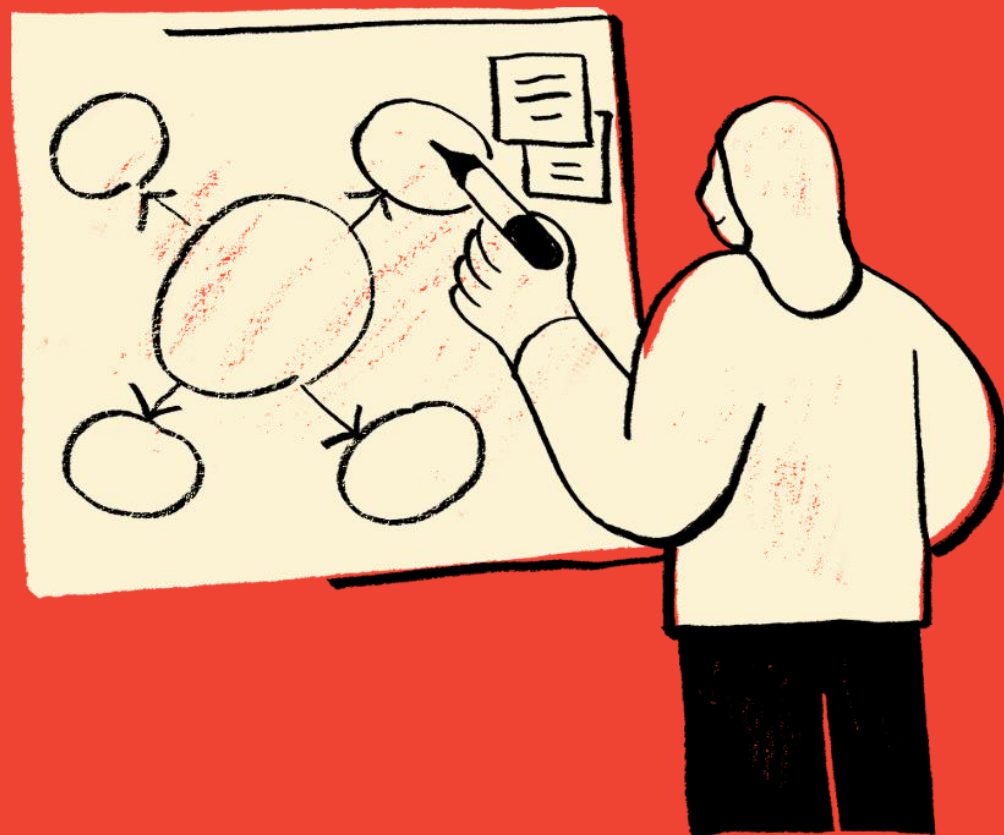
"It is rare for us to congratulate the Bordelais in their pricing policy, but they have woken up and smelt the coffee..."

- Specialist UK merchant

Eight respondents reported no standout moments in 2025:

"I literally can't think of a single really positive moment..."

- Specialist UK merchant



LOOKING FORWARD TO 2026

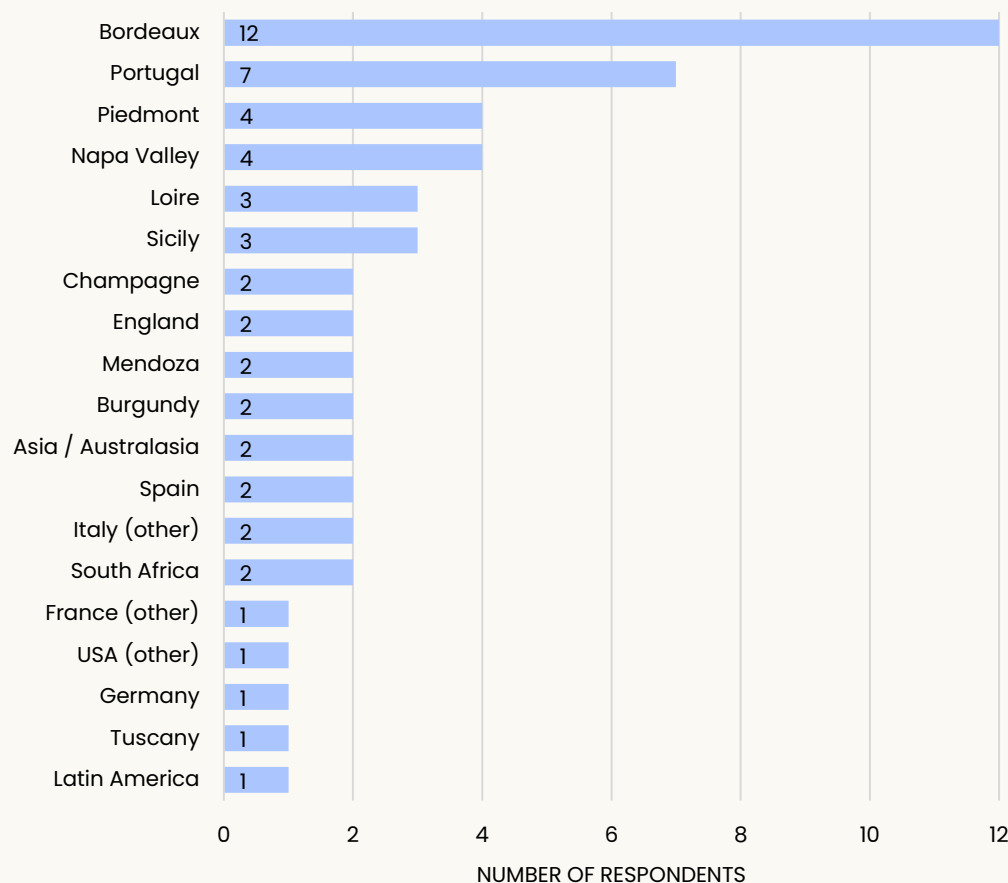


03

OENOTOURISM IN 2026

WHICH OENOTOURISM EXPERIENCES OR DESTINATIONS SHOULD BE ON EVERY WINE ENTHUSIAST'S RADAR IN 2026?

EXPERIENCES CITED PER COUNTRY



Respondents highlighted a range of oenotourism destinations, covering wineries, museums, and countries. 12 of these sites were in Bordeaux, including seven respondents citing the region itself, two respondents highlighting La Cité du Vin, and a mention each for Saint-Émilion, Château Palmer's half-day tour, and dinner at Château d'Yquem.

Of the 72 wineries mentioned by the trade, Taittinger and Château d'Yquem stood out as the only estates with multiple mentions.

TAITTINGER, 3 MENTIONS

- Tours of the historic UNESCO-listed crayères beneath Reims, followed by various tasting options
- Recently opened new visitor reception / HQ and restaurant, Polychrome
- Domaine Carneros (Taittinger's Napa estate) was also cited: a château-style winery with terrace tastings and a successful tourism offering

D'YQUEM, 2 MENTIONS

- Appointment-only visits to vineyard and cellars, emphasising controlled access
- Tours focus on botrytised harvest practices and d'Yquem's selection process
- Tastings usually include Y (dry white) and a vintage of d'Yquem

The 57 respondents were asked to list one experience each.

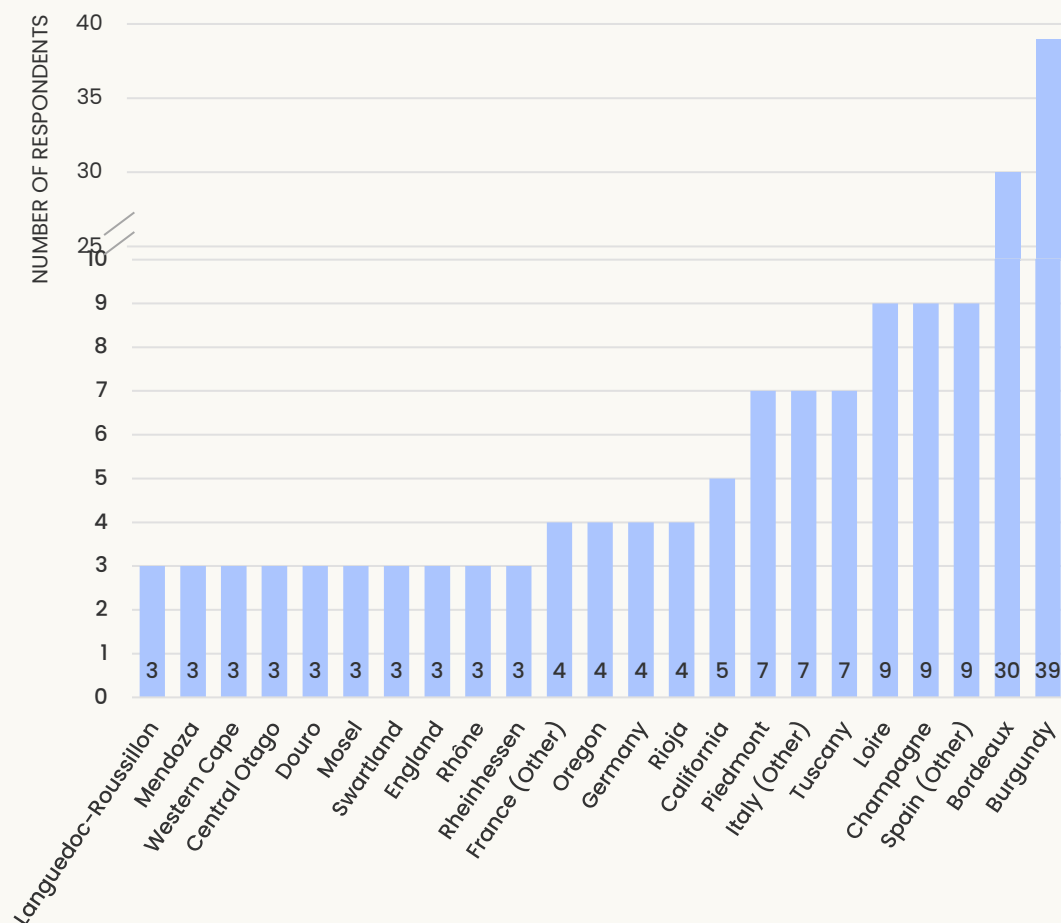
PRODUCERS ON THE RISE

WHICH RISING STAR PRODUCERS WE WILL BE HEARING ABOUT IN 2026 (IF WE HAVEN'T ALREADY!)?

Out of 31 regions mentioned, we highlight below the 23 that were mentioned more than twice.

Burgundian producers saw both the most mentions overall and saw a surge in mentions since last year's study.

RISING-STAR PRODUCERS CITED PER REGION



Respondents were asked to list up to two producers.

BURGUNDY PRODUCERS MENTIONED

Armand Heitz
Arnaud Baillet
Camille Thiriet
Cassiopée
Chandon de Briailles
de l'Arlot
Derey Frères
des Cabottes
d'Eugénie
Domaine de la Monette
Dubuet Boillot
Dugat-Py
Duroché
Génot Boulanger
Guellec-Ducouet
Guy Bocard
Henri & Gilles Buisson
Henri Boillot
Jean Marshall

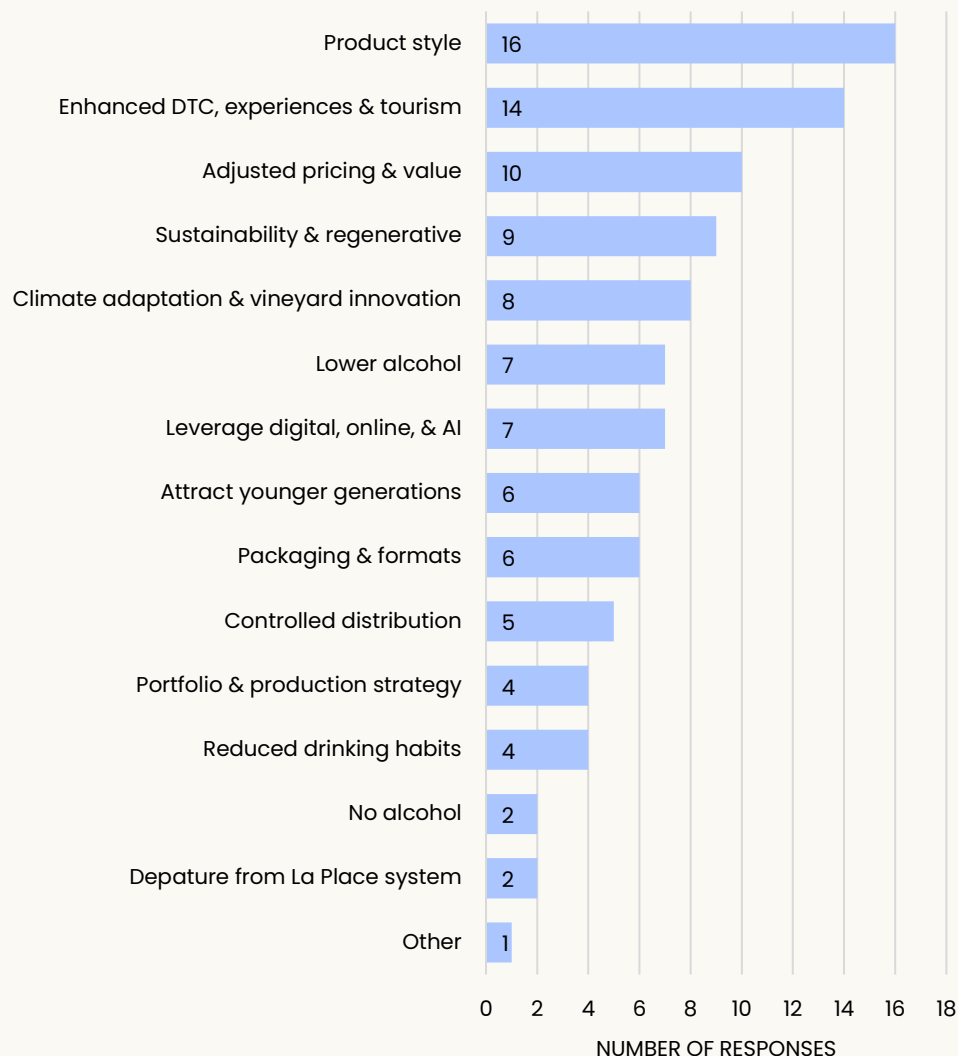
Jean-Baptiste Boudier
Jean-Baptiste Hardy
Jean-Claude Boisset
Jean-Marc Boillot
Jean-Marc Millot
Jean-Marc Vincent
Jérémy Arnaud
Jessiaume
Kei Shiogai
Koji Nakada
La Soeur Cadette
Le Puy de l'Ours
Les Horées
Louis Billard
Maison A & S
Philippe Colin
Pierre Girardin
Stéphane Magnien
Théo Dancer
Truchetet



OPPORTUNITIES FOR PRODUCERS

WHAT INNOVATIONS AND EMERGING TRENDS IN THE WINE INDUSTRY SHOULD WINERIES HARNESS TO MAXIMISE GROWTH IN THE YEARS TO COME?

Our respondents highlighted 15 key opportunities for producers to maximise growth in the year ahead.



The most cited opportunity is a renewed focus on product style, respondents often referencing a fresher, more “drinkable” wines, approachable in their youth (16 responses):

“Work on the wine style (more digestible, accessible in their youth without losing ageing potential).”

– Top-tier UK merchant

Many respondent also suggested an enhanced focus on direct-to-consumer activities was most-commonly cited (14 responses):

“Connect premium wine offerings with wine visits for consumers. Tasting, lunches, cellar tours. Too many producers are still too inaccessible..”

– Specialist UK merchant

“Focus on events, social media and getting the next generation into wine.”

– Top-tier UK merchant

Separately but related, lower alcohol was mentioned seven times.

“Lower alcohols via vineyard management rather than scientific manipulation.”

– Top-tier UK merchant

OPPORTUNITIES FOR PRODUCERS CONT.

Our respondents highlighted 15 key opportunities for producers to maximise growth in the year ahead.

Six respondents highlighted the importance of attracting younger generations:

"Sustainability as a way of recruiting new customers and appealing to a younger, more socially conscious demographic."

- Specialist UK merchant

"Social media and communication to relate to a younger audience to bring them into the premium wine sector."

- Top-tier UK merchant

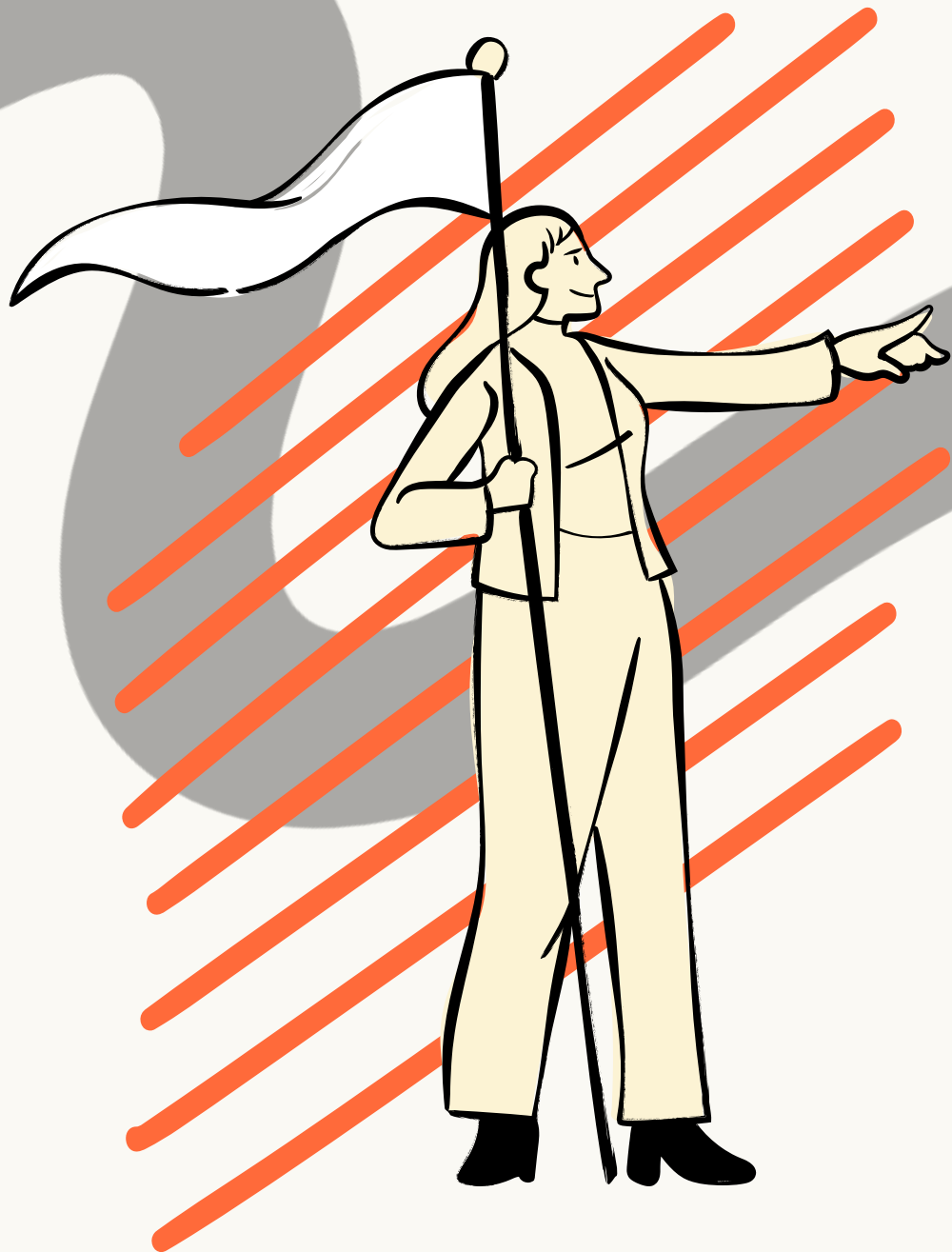
In addition to more granular suggestions, one respondent highlighted the need to adapt to broader, macro-level market trends:

"So many wineries still seem to depend on continuous high growth in sales, which is clearly not realistic nor sustainable. The wine market will probably not continue to grow forever and there are not so many new miracle markets to be opened, so it seems crucial to find another model in which market saturation and over-competition are not the unwanted side-effects of excessive ambition or too much financial leverage."

- Top-tier UK merchant



WINE'S DRIVING FORCE



04

A CAREER IN WINE

WHAT MAKES WINE THE INDUSTRY FOR YOU?

A passion for the product is the overwhelming driver behind respondents choosing a career in wine: nearly all respondents (50 out of 57) cite their enjoyment of drinking and tasting as their primary motivation for being in this industry.

Beyond this, the industry's cultural and experiential appeal stands out strongly, with connections to gastronomy, travel, and the lifestyle of wine all receiving over a third of mentions:

"An opportunity to discover the world, with a refined and fascinating cultural standard."

- Specialist Europe merchant

Wine is also seen as a deeply social sector, with community and relationships – including with the producers – ranking just behind lifestyle motivations:

"Great people, selling great wines with authenticity and passion."

- Top-tier UK merchant

"A unique community that encompasses family, traditions, religion, culture, and nature."

- Specialist Americas merchant

Interest in nature and viticulture remains a meaningful draw, while factors such as the industry's prestige, business potential, or personal/family connections playing a lesser role.



Technical or scientific motivations are cited least often, suggesting that the emotional, cultural, and human dimensions of wine are far more influential.

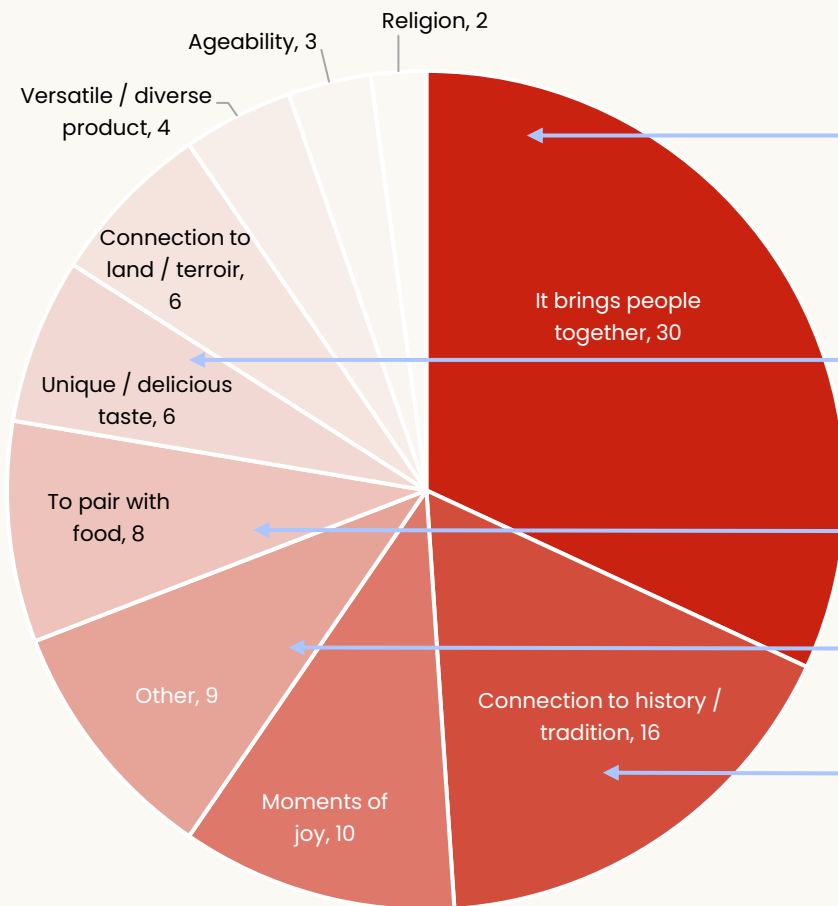
Five respondents provide other reasons for being in the industry, including the "connection to history" from a top-tier Americas merchant.

Respondents were invited to select multiple options.



THE CULTURE OF WINE

IN A ONE-SENTENCE MANIFESTO, WHY SHOULD WINE REMAIN A CENTRAL PART OF OUR CULTURE?



"It brings people together, allowing people to share profound moments over a simple product born from a grape in a vineyard - find me another product with the same transformative effect!"

- Specialist UK merchant

"Wine is a symbol of civilisation itself, connecting us to the earth, to history, and to each other."

- Top-tier Americas merchant

"It enhances life - lunch or dinner without wine is not nearly as enjoyable - sharing wine creates memories and relationships."

- Top-tier Americas merchant

"Because wine is theological, nourishing, and disease-dispelling."

- Specialist Europe merchant

"Wine, oil, and bread have been integral to our European history since the beginning."

- Top-tier Europe merchant

WHAT WE'VE BEEN DRINKING

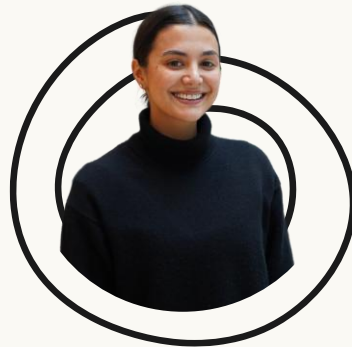


05

WHAT WE'VE BEEN DRINKING



ELLA LISTER
Founder & CEO



TARA ALBINI
COO



MAGGIE HAAN
Head of Analysis

Envinate **Benje Tinto 2023**

The team introduced me to Envinate a couple of years ago at a BYO summer dinner at the Drapers' Arms, and there was something thrilling about the white we tasted blind that evening. Since then, I've been trying different cuvées when I see them, and ordered a bottle of Benje at Pépites wine bar in Paris recently. It's a field blend of indigenous varieties planted at 1000 metres of altitude on volcanic soil on the island of Tenerife, with 70-100 year-old untrained vines. Its smoky minerality is to-die-for, and it ticks the box for a midweek house wine without breaking the bank.

Marie-Pierre Chevassu-Fassenet **Savagnin Ouillé 2023**

Born and raised in the Jura, Marie-Pierre comes from a family of vigneron and started her own winemaking journey in her late teens. After studying in Beaune and Dijon, she gained experience in New Zealand, Châteauneuf-du-Pape, and Champagne before returning to the Jura in the early 2000s, eventually taking over her family estate in 2008. She farms 4.5ha organically and ferments and ages all whites in old barrels. She makes Savagnin Ouillé only in exceptional years, offering a cleaner, more vibrant style alongside her more traditional oxidative expressions of the grape.

Frank Cornelissen **Susucaru Rosso 2022**

Frank Cornelissen's Susucaru Rosso is a reminder that great wine (and great winemakers) evolve. One of the original pioneers of the natural wine movement, he's now more "natural-leaning" than strictly natural, while continuing to be fully organic. This wine has all the bright, juicy red fruit you'd look for in an Etna Rosso, accompanied by a defined tannic backbone and notes of spice. Utterly moreish, I find I have to stop myself from drinking it too quickly! My go-to year-round, it can be served lightly chilled in summer, and has enough weight to stand up in the winter.

WHAT WE'VE BEEN DRINKING CONT.



AIDAN GRIFFITHS

Head of Accounts



HENRY YOUNGBLOOD

Events & Account Manager



ROSIE BICKERDIKEY

Junior Account & Marketing Manager

Langlois-Château Crémant de Loire Brut Réserve

I'm a firm believer that sparkling wine shouldn't be reserved for special occasions, and this Crémant de Loire Brut Réserve from Langlois-Château really overdelivers in terms of quality-to-price ratio. Made from Chenin Blanc, Chardonnay, and Cabernet Franc (including 10% reserve wine) using the méthode traditionnelle and aged for a minimum of 24 months, it usually retails at around £16 – the perfect excuse to indulge in some midweek bubbles.

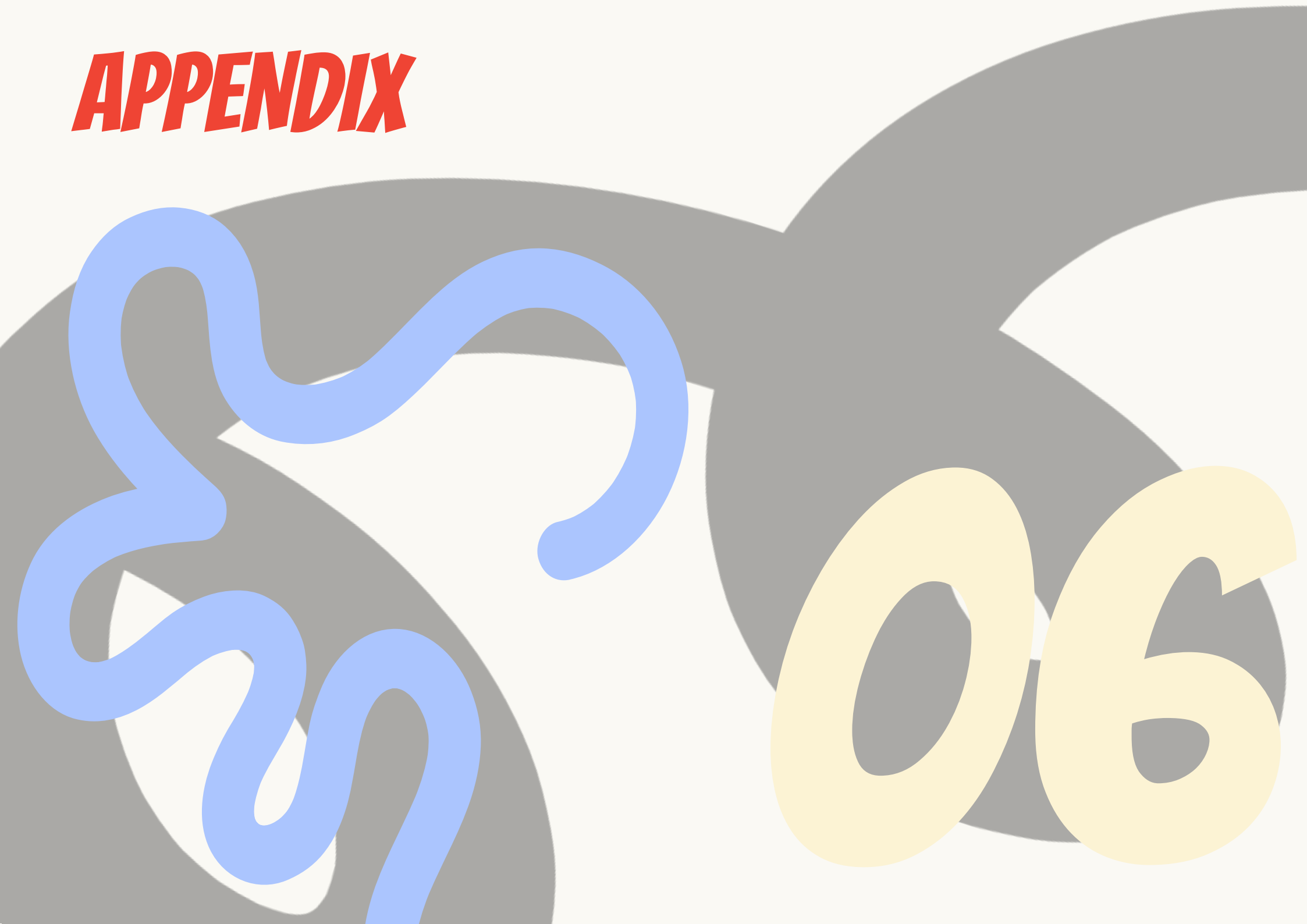
Momento Grenache Noir 2018

This was recommended to me by the sommelier at Akoko. Made by Marelise Niemann, the fruit for the wine primarily comes from dry-farmed vines in Paardeberg. The wine's colour is striking: an ethereal ruby with hints of orange. The nose is beautifully layered in a Burgundian way, with fruits, leaves, earth, and spices flitting in and out. The palate upholds the complexity promised by the nose, with an added salinity giving it a contrasting note to keep tension alive. The intensity is at odds with the texture: so light as to be barely perceptible.

Clos Cibonne Côtes de Provence Cru Classé Rosé 2023

A rosé that completely redefined Provence for me. I first tried it at our summer team dinner at a BYO Sri Lankan restaurant and was struck by how effortlessly it held its own against spice. I later stumbled upon a bottle at a tiny caviste in the Alps and opened it back in London with friends, alongside a cheese board. It was a true crowd-pleaser – not least because its deep orange hue challenges everything most people (my former self included) associate with Provence rosé. I'll be seeking out more.

APPENDIX



APPENDIX

Africa

South Africa

Alheit
David & Nadia
Jasper Wickens Wines
Mullineux
Sadie Family
Sakkie Mouton
Thorne & Daughters

Americas

Argentina

Bemberg Estate
Bodega Lagarde
Catena Zapata
Cheval des Andes
Zuccardi

Chile

Clos Apalta
VIK

California

Beaulieu Vineyard
Chandon Napa Valley
Domaine Carneros

Favia
Hundred Acre
Inglenook
Jasud Estate
Mayacamas
Pym-Rae
Racines Wines
Realm Cellars
Oregon
00 Wines
De Ponte
Golden Cluster
Walter Scott
Virginia
Gauthier

Asia / Australasia

China

Helan Qingxue

Georgia

Bedoba

Japan

Mie Ikeno

New Zealand

Centralis
Felton Road
Wild Irishman
Jules Taylor
Dry River

Europe

Austria

Hannes Sabathi

France

Alsace

La Grange de l'Oncle Charles

Bordeaux

Batailley
Beausejour
Beau-Séjour Bécot
Brane Cantenac
Calon Ségur
Canon
Cantemerle
Cheval Blanc
Climens

Closiot
Cos d'Estournel
de Ferrand
Duhart-Milon
Figeac
Fleur Cardinale
Grand Mayne
Grand Puy Lacoste
Guillot-Clauzel
Haut-Bailly
Haut-Brion
Lafleur
La Gaffelière
Lascombes
Léoville Las Cases
Les Carmes Haut-Brion
Liber Pater
Margaux
Marsau
Montlandrie
Montrose
Palmer
Pichon Comtesse
Rauzan Ségla

Siran
Trotte Vieille
Talbot
Troplong Mondot
Vauthier
Vieux Château Certan
d'Yquem
Burgundy
Armand Heitz
Arnaud Baillet
Camille Thiriet
Cassiopée
Chandon de Briailles
de la Monette
de l'Arlot
Derey Frères
Des Cabottes
d'Eugénie
Dubuet Boillot
Dugat Py
Duroché
Faiveley

APPENDIX

Génot Boulanger
Guellec-Ducouet
Guy Bocard
Henri & Gilles Buisson
Henri Boillot
Jessiaume
Jean-Baptiste Boudier
Jean-Marc Vincent
Jean Marshall
Jean-Baptiste Hardy
Jean-Claude Boisset
Jean-Marc Millot
Jérémy Arnaud
JM Boillot
Kei Shiogai
Koji Nakada
La Soeur Cadette
Le Puy de l'Ours
Leroy
Les Horées
Louis Billard
Maison A & S
Pierre Girardin

Philippe Colin
Stéphane Magnien
Théo Dancer
Truchetet
Champagne
Clandestin
Deutz
Elise Dechannes
Étienne Calsac
Huré Frères
La Rogerie
Pascal Agrapart & Fils
Petit Clergeot
Taittinger
Ulysse Collin
Jura
du Calice
Jurançon
Clos Thou
de Souch
England
Danbury Ridge Wine Estate

Simpsons Wine Estate
Sugrue South Downs
Languedoc-Roussillon
Bergerie de l'Arcade
Danjou-Banessy
La Pèira
Loire
Agisson
Belargus
Clos Rougeard
Clos Thierrière
Coulée de Serrant
de la Garrelière
du Gaubourg
Ogereau
Étienne Bodet
Montdomaine
Nicolas Barbou
Thibaud Boudignon
Xavier Frissant
Rhône
Beaucastel
du Gour de Chaulé

G&J Bott
La Réméjeanne
Regional
French Bloom
Germany
Alex Schregel
Christmann
Domäne Serrig
Dreissigacker
Hermann Ludes
Klumpff
Kühling-Gillot
Rudolf Furst
Schätzel
Selbach-Oster
Wittmann
Italy
Alto Adige
Elena Walch
Campania
Feudi di San Gregorio
Emilia-Romagna
Chiara Condello

Lombardy
Dirupi
Sando Fay
Piedmont
Cantina d'Arcy
Cascina Fontana
Elio Altare
Fratelli Alessandria
Gaja
Paolo Scavino
Piero Busso
Roagna
Stefano Occhetti
Walter Massa
Sicily
Giovanni Rosso
Girolamo Russo
I Vigneri
Planeta
Tenuta delle Terre Nere
Tuscany
Canalicchio di Sopra

APPENDIX

Fattoria Le Pupille

Ipsus

J.G Benda

Le Ragnaie

Ornellaia

Podere Le Boncie

Ridolfi

Tenuta di Carleone

Tua Rita

Veneto

La Biancara di Angiolino Maule

Villa Sandi

Volcanalia Wines

Portugal

Blandy's

Casa Ferreirinha

D'Oliveiras

Geographic Wines

Graham's

Henriques & Henriques

Herdade Do Esporão

Luís Pato

Susana Esteban

Symington

Taylor's

Spain

Alegre Valgañón

Artadi

Bufadors

Celler Perelada

Comando G

del Aguila

Envínate

Frontonio

Lustau

Olivier Rivière

Rafael Palacios

Raul Moreno

Raúl Pérez

Remírez de Ganuza

Telmo Rodriguez

Viña Corrales

Switzerland

La Côte

Denis Mercier

International

Grange La Chapelle

JP Moueix

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