Prosecco

Origins Production and Global Markets

STUDY PRODUCED BY: AZALEYA | Italian Prosecco | https://azaleya.com

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Executive summary

Prosecco combines a legally defined origin in north-eastern Italy with a fresh, fruit-led style and a production method that can serve large international markets. Its largest appellation, Prosecco DOC, bottled 667 million bottles in 2025, up 1.1% from 2024. The DOC consortium reports around 547 million bottles for foreign markets and distribution across 164 countries. Separately, a customs-based analysis of Italian Prosecco put 2025 exports at €1.77 billion, down 1.8% in value even as volume rose 2.4%. The two measures show why rising shipments and rising export revenue cannot be assumed to move together. [1–3]

1 Origins and development

The name Prosecco is associated with the village of Prosecco near Trieste. The local tradition linking it to the Roman wine Pucinum is part of the area's historical narrative. Clearer documentary evidence comes from the eighteenth century. In 1754, Aureliano Acanti described an apple-scented Prosecco from the Berici Hills near Vicenza. In 1772, Francesco Maria Malvolti referred to Prosecco wines from the hills of Treviso. These references establish an early regional presence for the name. The modern sparkling style developed later, as winemakers gained better control over fermentation and pressure. [4]

Conegliano became a centre of technical wine education. Its school of winemaking, founded in 1876, was Italy's first, and an experimental station for viticulture and oenology followed in 1923. Research into viticulture and sparkling-wine production helped growers and winemakers translate local practice into a more repeatable process. The tank method, known as Martinotti or Charmat, eventually provided the technical basis for producing aromatic sparkling wine at much greater scale. [5, 8]

In 1969, Italy granted DOC status to the original Conegliano–Valdobbiadene area. A reorganisation in 2009 established the broader Prosecco DOC and recognised the Conegliano Valdobbiadene and Asolo hill denominations as DOCGs. The modern system uses Glera as the grape name and Prosecco as the geographical wine designation. DOC stands for Denominazione di Origine Controllata. DOCG adds Garantita. Both are Italian traditional terms used for wines with protected designations of origin, and each appellation has its own production specification. [5–7, 12]

The three designations reflect two developments that now coexist. A broad supply area and tank fermentation support a sizeable export trade. Smaller hill appellations communicate origin through their boundaries and, in Conegliano Valdobbiadene, through more specific references such as Rive and Cartizze. These categories matter commercially because the word Prosecco on its own covers wines with different sources, production limits and price positions. [6, 7, 12]

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2 Geography Appellations and Grapes

Production geography

Prosecco DOC spans nine provinces across Veneto and Friuli Venezia Giulia. The Veneto provinces are Belluno, Padua, Treviso, Venice and Vicenza. The Friuli Venezia Giulia provinces are Gorizia, Pordenone, Trieste and Udine. The zone includes plains and foothills, so elevation, drainage, exposure and the practicality of mechanisation vary. DOC labels may add Treviso or Trieste when the applicable grape-growing, winemaking and bottling conditions are met within the named province. [1, 6]

Conegliano Valdobbiadene Prosecco DOCG covers 15 municipalities in the Treviso hills. Spumante from this appellation can carry the label Prosecco Superiore. The consortium identifies 43 Rive, each tied to a municipality or part of one. Rive wines require hand harvesting, a vintage indication and a maximum grape yield of 13 tonnes per hectare. Superiore di Cartizze comes from a delimited area of 107 hectares in Valdobbiadene. Asolo Prosecco DOCG is a separate appellation centred on Asolo and the nearby Treviso foothills. It also produces sparkling wines labelled Superiore. [7, 12]

UNESCO inscribed the Prosecco Hills of Conegliano and Valdobbiadene in 2019 as a cultural landscape. The site is distinguished by narrow ridges, grass-covered terraces called ciglioni, and a mosaic of vineyards, woodland and villages. The inscription covers a defined landscape within the historic wine area. The wine appellations have independently defined boundaries. On steep sites, slope and parcel size affect access, vineyard labour and harvest logistics. Differences in aspect and elevation can also influence the pace of ripening. [7, 9]

Glera and permitted blends

Glera is the principal white grape. Typical wines show notes of apple, pear, citrus and white flowers, with freshness supported by acidity. The balance between sugar and acidity at harvest matters because it sets the starting point for the base wine. Pressing, fermentation temperature, residual sugar and the level of carbonation all influence how the fruit and acidity come through in the finished glass. [1, 6, 8]

White Prosecco DOC is based on at least 85% Glera. Permitted complementary grapes include the local Verdiso, Bianchetta Trevigiana, Perera and Glera Lunga, as well as Chardonnay, Pinot Bianco, Pinot Grigio and white-vinified Pinot Nero, subject to the specification. Prosecco DOC Rosé Spumante has its own formula of 85–90% Glera and 10–15% Pinot Nero vinified as red wine. Skin contact during red vinification supplies the colour and can add red-fruit character. The DOC Rosé category was approved in 2020. [6, 8]

The appellation and grape variety answer different questions about a wine. Glera identifies the principal raw material. The designation tells the buyer which geographical and production rules apply. The label's pressure category and sweetness term then give additional information about how that wine will drink. [6, 7, 10]

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3 Fermentation and Technical Specifications

From grapes to base wine

White grapes are pressed and the must is clarified before the first alcoholic fermentation. Yeast converts grape sugars to ethanol and carbon dioxide. The base wine is then clarified and prepared for the next stage. The DOC consortium describes a representative first fermentation of about 15–20 days at around 18 °C. Wineries set their own working conditions within the specification according to the must, yeast and intended style. Cool fermentation and careful handling help preserve the fruit and floral profile. [8]

How Prosecco gets its bubbles

In the Martinotti–Charmat method, the winemaker introduces yeast and fermentable sugar into the base wine in a sealed pressure tank, or autoclave. The carbon dioxide created during the second fermentation remains dissolved under pressure. After fermentation and any intended time on the lees, the wine can be chilled, filtered and bottled under pressure to retain carbonation. The Prosecco DOC consortium describes a minimum second-fermentation cycle of 30 days for its standard sparkling and semi-sparkling styles and at least 60 days for DOC Rosé. [1, 8]

Tank fermentation gives the cellar control over temperature, pressure and timing across a batch. It allows producers to capture a fresh, primary-fruit style with relatively little yeast-derived character when lees contact is brief. Some producers extend lees contact to build texture. In bottle-refermented styles, the second fermentation occurs in individual bottles. Conegliano Valdobbiadene's Sui Lieviti is an example in which the wine stays on its yeast sediment and may appear cloudy. [7, 8]

Pressure and residual sugar

Spumante is the fully sparkling category, frizzante is semi-sparkling, and tranquillo is still. Frizzante generally gives a gentler impression of carbonation than spumante. In 2025, about 78% of DOC output was white spumante and 9% was rosé spumante. Most of the balance was frizzante, with still wine accounting for roughly 0.1%. [1]

Sparkling wine term	Residual sugar in grams per litre
Brut Nature	Below 3, with no sugar added after secondary fermentation
Extra Brut	0–6
Brut	Below 12
Extra Dry	12–17
Dry	17–32
Demi-Sec	32–50

Regulatory sugar bands for sparkling wine. Terms available on a given Prosecco label depend on its product specification. [6, 10]

Extra Dry therefore has a higher residual-sugar band than Brut. Sweetness perception also depends on acidity, carbon dioxide and serving temperature, so the sugar figure alone gives only part of the sensory picture. According to the DOC observatory, Extra Dry represented roughly 61% of 2025 white spumante output, compared with about 34% for Brut. [1, 10]

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4 Exports and Leading Markets

Three measures of the 2025 market

The Prosecco DOC consortium recorded 667 million bottles bottled in 2025, including 60.4 million bottles of rosé. Its economic observatory lists approximately 547 million bottles for foreign markets and 120 million for Italy, placing the foreign share at about 82%. Trade reporting puts DOC distribution at 164 countries. These figures describe the DOC appellation. The observatory estimates its worldwide consumer-market value at €3.6 billion, including €2.95 billion abroad and €650 million in Italy. [1, 2, 11]

Del Rey AWM's analysis of Eurostat and S&P data provides a customs-based view of Italian Prosecco. It reports 418.4 million litres exported in 2025, equivalent to 557.8 million standard 750 ml bottles. Exports were worth €1.77 billion, or €4.24 per litre on average. The consumer-value estimate and the customs figure apply at different points in the supply chain and come from different reporting series. The litre-to-bottle conversion expresses volume in a common unit and says nothing about the packaging used for an individual shipment. [1, 3]

Leading destinations for Prosecco DOC

Destination	Position or share	Year-on-year change
United States	1st, 23.8% of exports	+8.0%
United Kingdom	2nd	+1.1%
France	3rd	+21.1%
Germany	4th	+3.1%
Greece	Other reported market	+22.4%
Mexico	Other reported market	+14.5%

Prosecco DOC consortium market update for January–September 2025. Ranking and changes refer to this reporting period. [11]

The United States accounted for nearly one quarter of DOC exports in the consortium's nine-month update. France moved ahead of Germany, while the United Kingdom remained second. The full-year customs-based analysis also found growth in France, where Prosecco reached €135.3 million and 36.1 million litres. US export value, by contrast with growth in the nine-month DOC indicator, fell by around €17 million in the full-year customs series. The periods, measures and series differ. Positive shipment volume can coexist with lower export value if unit values fall or if the product mix changes. [3, 11]

Conegliano Valdobbiadene export profile

The Conegliano Valdobbiadene consortium reported 38.1 million bottles exported in 2024, or 43.2% of the volume in its Italy/export breakdown, with shipments reaching more than 180 countries. It identified Germany, the United Kingdom, Switzerland, Austria and the United States among its top five foreign destinations. Its domestic market accounted for 56.8% of the volume in that breakdown, a much larger share than for the broad DOC in 2025. The destination counts are appellation-specific and should not be added together. [1, 13]

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5 Market Growth and Outlook

From rapid expansion to slower volume growth

Prosecco DOC moved from around 500 million bottles in 2020 to 627.5 million in 2021 and 638.5 million in 2022. After a decline in 2023, DOC bottling rose by 7% in 2024 to roughly 660 million, followed by 1.1% growth in 2025. The endpoints imply growth of roughly one third over five years, or around 6% annualised. This is an indicative calculation from rounded consortium figures. The historical releases use certified bottles, sales and bottlings in describing different years. [11, 14]

The hill appellations also expanded. The Conegliano Valdobbiadene consortium estimated 2025 sales at 98 million bottles, up 8% on 2024. The Asolo consortium's press kit reports 30.4 million Asolo Prosecco Superiore DOCG bottles produced in 2025, an increase of 26.5% from 2023. These figures have different denominators and periods and are best read as separate measures of each appellation's progress. [12, 15]

What will shape the next phase

Aperitif service, cocktails such as the Spritz and by-the-glass sales give Prosecco several routes to market. Tank production supports consistency across sizeable orders, while smaller appellations and site names give merchants more specific origins to sell. This breadth is a source of resilience. It also makes headline growth a poor substitute for tracking each denomination and price segment.

The 2025 customs figures show that higher shipment volume can coincide with a lower average export value per litre. Destination mix, promotional intensity, exchange rates and trade costs can all affect how that pattern develops. The concentration of DOC exports in the United States and the United Kingdom makes both markets important to watch. Gains in France and other destinations can broaden the base. Over the next reporting cycle, the most informative indicators will be volumes, export value per litre and destination shares measured over comparable periods. [3, 11]

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Sources

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