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Spain’s wine consumption falls 4.2%

Inflation and weaker demand pushed apparent consumption to 9.25 million hectoliters in the year through January 2026

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Spain’s apparent wine consumption fell 4.2% in the 12 months through January 2026, dropping to 9.25 million hectoliters, according to INFOVI data released Thursday. The decline means 627,374 hectoliters less wine were consumed than in the previous 12-month period, extending a downward trend that has been visible since late 2025 after a stretch of relative stability in 2023 and 2024.

The latest figures show that inflation and higher costs, which pushed up wine prices sharply in 2022, helped weaken demand in earlier years. Even as prices stabilized later, consumption did not recover to earlier levels. From February 2025 through January 2026, the market moved lower overall, with the sharpest monthly drop coming in September 2025, when apparent consumption fell 24.8% to 0.61 million hectoliters. November also showed a decline of 10.3%, while December slipped 2.5%. January 2026 brought a rebound of 11.3% from the prior month, to 0.67 million hectoliters, but not enough to reverse the broader trend.

By channel, hospitality held up better than food retail. Nielsen IQ data for the rolling 12 months through January 2026 show that wine sales in hospitality fell just 0.4% in volume and 0.1% in value, while food retail declined 3.8% in volume and 0.9% in value. Food retail still accounted for most of the market, with 64.1% of volume and 56.3% of value, but hospitality gained some share over the period.

Across both audited channels, total wine sales reached 6.19 million hectoliters and €3.226 billion in value. The average price rose to €5.21 a liter from €5.10 a year earlier, an increase of 2.1%. But once inflation is removed from the calculation, the picture changes: real market value fell 2.8% to €3.074 billion, and the real average price was essentially flat at €5.21 a liter.

The gap between audited sales and total apparent consumption remains large because Nielsen does not cover all channels. The difference is made up by what the industry describes as “other channels,” including wine shops, wine clubs, online sales, direct winery sales and self-consumption. That segment is estimated at 3.06 million hectoliters for the same period and fell 13.1%, underscoring how much pressure remains outside traditional retail and hospitality.

Within categories, wines with protected designation of origin continued to dominate the market. DOP wines represented 58.2% of volume and about 72% of value across food retail and hospitality combined, equal to 3.61 million hectoliters and €2.338 billion in sales value. Their volume slipped just under 1%, while value was nearly unchanged at -0.04%. In hospitality, DOP wines accounted for 81.4% of revenue, showing how central they remain to restaurant and bar sales.

Other categories performed less well. Wines with IGP posted the steepest declines, falling 13.45% in volume and 8.72% in value across both channels. Wines without geographic indication also weakened, down 4.4% in volume and 3.27% in value. Sparkling wines were one of the few categories to post a gain in nominal value, rising 0.66%, even as volume fell 2.35%.

In food retail, DOP wines made up 65.7% of value and just over half of volume at 51.7%. Wines without indication remained important by volume at 33.2%, but contributed only 12.6% of value. Sparkling wines accounted for 9.5% of volume and 16% of value in that channel, reflecting their higher average price.

Hospitality continued to command higher prices than food retail across nearly every category. The average price per liter in hospitality stood at €6.34, compared with €4.58 in food retail on nominal terms, a difference of about 38%. Sparkling wines were the most expensive category in both channels, topping €9 a liter in hospitality and more than €7 a liter in food retail.

When adjusted for inflation, food retail showed a real price increase of just under 1%, while hospitality prices fell about 2%. That divergence suggests that restaurants and bars have had less room to pass on cost increases than supermarkets and other retail outlets have had over time.

The longer-term trend remains clear: Spain’s apparent wine consumption has been drifting lower since early 2019, even as nominal sales values have risen because of higher prices and a shift toward more expensive wines.