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Italian Wine Exports Hit $7.7 Billion in 2025

The sector remains a major export engine for Italy, but growers report rising costs and growing exposure to trade tensions

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Italian wine producers are facing rising pressure from tariffs, trade tensions and higher costs, even as the sector remains one of the strongest parts of the country’s agrifood economy, according to the sixth AGRIcoltura100 report presented Monday in Rome by Reale Mutua and Confagricoltura.

The report, prepared by MBS Consulting, surveyed more than 3,800 agricultural businesses between August 2025 and February 2026. It found that sustainability continues to be a key factor for competitiveness in Italian farming, but it also showed how exposed wine companies are to international instability.

Wine and musts generated €7.778 billion in exports in 2025 against €566 million in imports, leaving a trade surplus of €7.212 billion, according to the report. That surplus makes viticulture a central pillar of Italy’s agrifood balance, especially at a time when other sectors run large deficits. The fish sector posted a deficit of €6.8 billion, while meat and livestock were down €5.5 billion.

But the report also said that this strength comes with risk. Italian wine growers are heavily dependent on foreign demand, especially from the United States, which has long served as a key market for balancing exports. The survey found that 57.5% of wine growers said they were very or fairly worried about tariffs and trade tensions, the highest level among agricultural categories. Another 31% of wine companies said they had already felt direct effects from those tensions, nearly double the national agricultural average of 16.6%.

The report pointed to three main consequences: more bureaucracy and compliance costs in international trade, higher logistics and export expenses, and the risk of losing foreign customers and market share. It said the United States remains the most important partner for helping offset broader agrifood deficits, but warned that relying so heavily on one market leaves the sector vulnerable if trade conditions worsen.

The survey also showed that many wine businesses are still holding steady on paper. About 70.6% reported stable or growing turnover, slightly below the agricultural average of 72.8%. About 73.7% said they maintained or increased production volumes. But the report noted that these figures can hide pressure on margins, especially for smaller producers facing higher energy bills and raw material costs that they cannot fully pass on to buyers.

That squeeze is pushing some firms toward larger scale operations, more integrated business models and tourism-related activities such as tastings and hospitality. The report said companies that diversify geographically and strengthen contracts are better positioned to absorb shocks from tariffs and volatile shipping costs.

It also said future growth will depend on quality differentiation rather than price competition alone, especially in markets such as India and Mercosur countries, where production costs are lower and competition is intense. For Italian wine exporters, the

report argued, sustainability and product identity will need to remain central as they seek new markets beyond Europe, which currently absorbs 73% of total exports.

The findings were presented at Palazzo Della Valle, the headquarters of Confagricoltura, as part of a broader discussion about how Italian agriculture can remain competitive while adapting to climate pressure, geopolitical uncertainty and slower global growth.