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Italian Wine Tourism Tops €3 Billion as Exports Slump

The sector now accounts for 21% of winery revenue, offering a buffer against weaker sales abroad and at home

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At Vinitaly 2026, UniCredit and Nomisma Wine Monitor presented a report that put hard numbers on a business many Italian wineries now see as central to their future: wine tourism. Based on a survey of 300 wineries and 13 protection consortia across Italy, the study found that in 2025 the sector generated more than €3 billion for wineries and accounted for an average of 21% of their revenue.

The findings were released during a workshop in Verona focused on the market for wine tourism and its role in supporting companies and local territories. The report, titled “Enoturismo: opportunità di sviluppo per imprese e territori,” was produced with

Vinitaly and the Associazione Nazionale Città del Vino. It showed that the overall trend remains upward, with visitor flows and revenue both growing, especially among larger and more organized wineries that can offer experiences beyond the standard cellar visit, tasting and direct sale.

The study said the typical visitor is Italian, making up 58% of the total, and is often a couple or a family, usually without deep wine expertise. International demand is also rising. At the same time, the report pointed to persistent obstacles that continue to limit growth: weak local infrastructure, heavy bureaucracy, limited incentives and a shortage of trained staff. Only a small share of wineries still do not offer any wine tourism activities.

The report framed wine tourism as more than an add-on to wine sales. In a year marked by pressure on exports and domestic consumption, it described the sector as a source of value creation for wineries facing geopolitical tensions, trade barriers and changing drinking habits. UniCredit said wine and tourism remain key to Italy’s competitiveness, especially as climate and geopolitical challenges force companies to adapt. Nomisma said wine tourism should not be treated as a backup plan but as a competitive strategy that can improve margins by reducing intermediaries and turning visitors into brand ambassadors.

The broader market context remains difficult. According to the same analysis, Italian wine exports fell 3.6% in value in 2025 because of geopolitical tensions, protectionism, U.S. tariffs and a weaker dollar. Sales through large retail channels in Italy fell 3% in volume, with still wines down 4%, while sparkling wines rose 2.7%. Out-of-home consumption remained weak as consumers cut spending, restaurant visits declined and domestic tourism fell 3.5%.

The slowdown was not limited to Italy. France saw export value fall 4.4%, Spain 5.1%, Chile 10.2% and Australia 14.6%. U.S. producers were hit especially hard, with exports down 36% after retaliation linked to tariffs.

Italy’s wine production stayed broadly stable at 44.4 million hectoliters on 681,000 hectares of vineyards. Some regions posted gains, including Trentino-Alto Adige at 15.2%, Lombardy at 11.7%, Puglia at 9.7% and Veneto at 6.1%. Others declined

sharply, including Tuscany at 18.4%, Emilia-Romagna at 10.2%, Piedmont at 7.4% and Sicily at 5.8%.

The report also highlighted structural shifts in the country’s vineyards over the past decade, including a decline in the share of red grapes in many regions as consumer demand has moved toward sparkling wines and whites. In Veneto, for example, the share of Glera and Pinot Grigio has fallen from 25% to 16%. The organic vineyard area now represents 19% of Italy’s total vineyard surface, with Basilicata, Marche and Tuscany above 45%, while Sardinia remains last at 6%.

For exports of bulk wine, Emilia-Romagna leads with 25%, followed by Puglia at 20% and Sicily at 15%. Veneto remains the top exporter of sparkling wine at 47%, ahead of Friuli-Venezia Giulia at 38%, Piedmont at 34% and Lombardy at 29%. Over the past decade, sparkling wine exports have grown strongly in southern regions such as Sicily and Puglia as well as in Tuscany.

In the United States, imports of Italian wine fell 13% in value in 2025 while volume was nearly flat, down just 0.2%. Asti spumante dropped 13.5%, Sicilian reds fell 13.1%, while Prosecco and Tuscan reds declined more modestly. Sicilian white wines rose 12.4%, and Tuscan whites climbed 62.2%.