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Italian Wine Exports Slow as Producers Face Pressure

Industry groups warn that weaker foreign demand, falling margins and a generational shift are deepening the sector’s slowdown.

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The Italian wine industry is facing a difficult moment marked by weaker exports, pressure on margins and a widening gap with younger consumers, according to figures cited by industry observers and trade groups.

Italy remains the world’s largest wine producer, but the sector is dealing with a structural slowdown in domestic consumption and growing uncertainty in key foreign markets. The latest data point to a global production level of 227 million hectoliters, historically low by recent standards, while Italian producers are trying to protect value at a time when sales volumes are under strain.

The sharpest warning signs are coming from abroad. Exports have slowed as demand fell 13% in the United Kingdom and 9% in Germany, two of Italy’s most important markets. Producers are also contending with persistent problems in the United States, where they have had to lower average prices to defend sales against stronger competition from countries including New Zealand and France.

That price pressure is forcing many wineries and consortia to rethink how much fruit they bring to market. The logic is straightforward: less grapes in the vineyard can mean better pricing in the cellar and less risk of weakening a brand. Several denominations have already moved in that direction, cutting the amount of grapes eligible for classification in an effort to preserve quality and market position.

The issue is not only economic. It is also about identity. Italian wine has long relied on territorial names, local grape varieties and regional traditions as part of its appeal. But producers now say those elements must do more than support marketing language. They have to justify price and help defend the sector against commoditization.

Recent moves by historic denominations show how this strategy is playing out. Brunello di Montalcino and Pinot Grigio delle Venezie have led efforts to reduce volumes of grapes that can be claimed under their labels. Soave has been one of the few exceptions moving in the opposite direction, ending the latest year with higher bottled output and lower inventories after a strong push in collective promotion.

Other export-oriented denominations have struggled. Asti Docg recorded a 9% decline, hit by weaker Moscato sales in the United States and softer sparkling wine demand in Russia. For many producers, those declines are not isolated events but part of a broader shift in consumer behavior and international trade conditions.

The generational divide may prove just as important as tariffs or exchange rates. Industry data suggest that consumption among people under 25 will fall 4% in the coming years, while consumption among those over 65 is expected to rise 11%. Producers say younger drinkers often see wine as distant or overly technical, and that current messaging around Italian wine does not speak clearly enough to them.

That communication problem is widely recognized inside the industry. About 81% of companies say the current way Italy promotes the value of “Made in Italy” is not effective enough, while 95% say there is still too little knowledge abroad about Italy’s biodiversity and native grape varieties.

At the same time, scientific research is challenging some long-held assumptions about identity in Italian wine. Although more than 500 native grape varieties are listed in the national register, studies suggest that only five can be considered truly original founding varieties of Italian viticulture, including historic lines linked to Aglianico, Lambrusco and Greco. That finding is pushing producers to focus less on broad regional pride alone and more on a smaller group of grapes seen as pillars of adaptation and resilience as climate conditions change.

For wineries, consortia and exporters, the challenge now is how to explain why a bottle tied to a specific place should command more than an ordinary market price at a time when consumers are spending less, foreign demand is uneven and younger buyers are drifting away from wine altogether.