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European Union Reaches €26.9 Billion Trade Surplus in Alcoholic Beverages

Wine, spirits and beer exports lose value despite the European Union’s large trade surplus

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European Union exports of wine, spirits and beer lost momentum in 2025, even as the bloc posted a record year for overall agri-food trade, according to the latest European Commission data released on June 2.

The figures show that the EU remained a strong net exporter of alcoholic beverages, but demand weakened in several of its most important overseas markets, led by the United States and China. Wine, beer, cider, spirits and liqueurs all ended the year with lower export values than in 2024.

That slowdown stood out against a broader backdrop of growth. Total EU agri-food exports reached EUR238.4 billion in 2025, up 1.2% from a year earlier. But alcoholic beverages did not share in that increase. Instead, the sector faced falling sales in some of the destinations that have long supported its highest-value exports.

Wine and wine-based products remained one of the EU's leading export categories in 2025, accounting for 7% of total agri-food exports. Export value reached EUR16.4 billion, but that was EUR1.0 billion lower than in 2024, a decline of 6%. The Commission said wine recorded the second-largest drop in export value among EU agri-food product groups.

The sharpest setback came from the United States, still the main foreign market for EU wine. Exports of wine and wine-based products to the U.S. fell by EUR721 million, or 14%, during the year. Even after that decline, the American market represented EUR4.4 billion in sales and 27% of total EU wine exports.

Other major destinations also weakened. Exports to the United Kingdom fell by EUR148 million, or 4%. Shipments to China dropped by EUR113 million, or 21%, while exports to Russia declined by EUR97 million, or 15%. The pattern pointed to simultaneous pressure across mature and premium markets rather than a problem limited to one country.

There were some areas of growth. Wine exports to Sub-Saharan Africa rose by EUR62 million, or 14%, and exports to Oceania increased by EUR40 million, or 11%. Those gains helped absorb part of the losses elsewhere, but they were not large enough to reverse the broader decline.

Spirits and liqueurs followed a similar path. EU exports in that category totaled EUR8.3 billion in 2025, down EUR510 million from the previous year, also a 6% decline. The Commission said this extended a downward trend that has been in place since 2022.

Again, the United States was the largest negative factor. Exports of EU spirits and liqueurs to the U.S. fell by EUR242 million, or 9%. The American market still accounted for EUR2.6 billion in sales and 31% of total EU spirits exports, underlining how important it remains for European producers despite weaker demand.

China also posted a notable decline, with imports of EU spirits and liqueurs down by EUR111 million, or 15%. Exports to Singapore fell by EUR104 million, or 20%, and shipments to Russia dropped by EUR102 million, or 24%. The fall in Singapore was especially significant because the city-state often serves as a regional distribution hub for premium spirits across Asia.

Sub-Saharan Africa was one of the few bright spots for spirits as well. EU exports to the region rose by EUR116 million, or 25%, making it one of the strongest growth markets for European distillers at a time when several established destinations softened.

Beer, cider and other beverages also ended the year lower. Exports reached EUR10.5 billion in 2025, down EUR332 million, or 3%, from 2024. Here too, the U.S. market played an outsized role. Exports to the United States fell by EUR341 million, or 17%. That means the decline in America alone was larger than the net global drop for the category, suggesting that other markets partly offset the loss.

The data point to a common theme across all three major alcoholic beverage groups: dependence on the U.S. market remains high, and any slowdown there has an immediate effect on overall export performance.

On the import side, spirits and liqueurs were the only alcoholic beverage category listed among the EU’s top 15 agri-food imports. Imports reached EUR4.3 billion in 2025, down EUR74 million, or 2%, from a year earlier.

Trade flows with two major suppliers moved in opposite directions. Imports of spirits and liqueurs from the United Kingdom fell by EUR194 million, or 8%. By contrast, imports from the United States rose by EUR132 million, or 12%. That shift made the EU-U.S. spirits relationship less favorable for European exporters during the year: Europe sold less to America while buying more from it.

Despite weaker exports, alcoholic beverages continued to generate large trade surpluses for the bloc. Wine and wine-based products posted a surplus of EUR15.0 billion in 2025. Beer, cider and other beverages generated a surplus of EUR8.0 billion. Spirits and liqueurs added another EUR4.0 billion.

Together, those three categories produced a combined trade surplus of about EUR26.9 billion. That remains a major contribution to the EU's overall agri-food balance. But each surplus narrowed from the previous year. The wine surplus fell by EUR943 million. The surplus for beer, cider and other beverages declined by EUR305 million. The spirits and liqueurs surplus dropped by EUR436 million.

In total, the combined surplus from those alcoholic beverage categories deteriorated by roughly EUR1.7 billion compared with 2024.

The broader trade report suggests this was not a collapse in competitiveness so much as a warning sign for one of Europe's most valuable export sectors. The EU still holds strong positions globally in wine, beer and spirits. But its best-known beverage categories are now facing weaker demand at once in markets that have historically driven premium growth.

For wine producers especially, that matters because export value is concentrated in countries willing to pay more for branded and geographically protected products. When those markets slow down together, replacing lost value becomes difficult even if volumes hold up elsewhere.

The same issue applies to spirits makers. Premium bottles sold into the U.S., China and Asian trading hubs carry far more weight than many volume-driven markets. A decline in those destinations can quickly reduce margins even when total shipments remain substantial.

The Commission's figures also show that diversification is becoming more important for exporters across Europe's beverage industry. Sub-Saharan Africa emerged as one of the few regions where both wine and spirits gained ground in 2025. Oceania also showed growth for wine. These markets are still much smaller than the U.S., Britain or China, but they offered rare support during a difficult year.

The United Kingdom presented a more mixed picture than other major partners. It remained an important destination for EU wine despite a modest decline and continued to be a major source of imports into the bloc across many food categories. But even there, beverage trade showed signs of softer demand rather than renewed expansion.

China’s role appears to be changing more sharply. Once seen as one of the main engines for premium European alcohol exports, it recorded declines in both wine and spirits in 2025. That suggests that producers can no longer rely on Chinese demand as they did during earlier years of rapid growth.

For exporters across France, Italy, Spain and other producing countries, the message from Brussels is clear enough: Europe’s alcoholic beverage sector remains globally relevant and strongly profitable in trade terms, but it is entering a period of slower growth and greater market risk.

That pressure comes at a time when wine remains central to EU agri-food identity. The Commission said wine and wine-based products were still among its top export categories last year, behind only cereal preparations and dairy products in value terms among leading groups cited in its report. Beer, cider and other beverages also remained sizable export businesses, while spirits continued to rank among Europe’s highest-value branded food and drink products.

What changed in 2025 was not Europe’s position as an exporter but the pace at which its beverage sector could expand abroad. The strongest declines came from countries that matter most for premium pricing and brand visibility. Gains in newer regions showed promise but did not yet match that scale.

For now, Europe’s drinks industry still holds large trade surpluses across wine, beer and spirits. But after years when premium overseas demand helped drive growth almost automatically, last year’s figures suggest that producers may need broader geographic reach and more flexible commercial strategies if they want to recover momentum.