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Global bulk wine exports fell 11.8% to €2.33bn over the past year

Shipment volumes dropped 10.3% to 30 million hectoliters, exposing sharper weakness than in the broader wine trade.

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Global exports of bulk wine fell sharply over the past year, extending a long-running decline in one of the wine trade's main supply channels, according to new data presented by the World Bulk Wine Exhibition.

The figures show that the value of bulk wine exports dropped 11.8% in the 12 months following April 2025, to €2.33bn. Export volumes fell 10.3% over the same period, to 30 million hectoliters, while the average price edged down to €78 per hectoliter.

The retreat in bulk wine was steeper than the decline in the broader global wine export market. For wine overall, export volumes fell 6.6% and export value fell 8.8% in the same 12-month period. That gap suggests bulk wine is facing heavier pressure than other parts of the market, even as the wider industry deals with weaker trade flows.

Bulk wine usually moves internationally in large containers and is then bottled or packaged closer to the final market. Because of that, the category plays a central role for importers, bottlers, retailers and private-label suppliers. A weaker bulk market can point to lower shipment turnover and added price pressure across parts of the beverage business that depend on large-volume sourcing and flexible supply agreements.

The new figures also show that the downturn is not new. According to the WBWE data, bulk wine export volumes fell 19.3% between 2017 and 2026, while export value dropped 11.7% over that period. The report said the category has not premiumized to the same extent as the bottled still wine market. In bottled non-sparkling wine, export volumes fell by a similar 19.8% over roughly the same period, but export value slipped only 2.5%.

That difference matters because it points to weaker pricing power in bulk wine. While the category still accounts for about one-third of global wine export volumes, its share of total wine export value has fallen. The report said bulk wine represented 8.5% of total wine export value in 2017 and now stands at 7.1%.

The analysis found that most major producing countries recorded declines in both bulk wine export volume and value. Spain remained the largest bulk producer by a wide margin, with more than double the volume of second-ranked Australia in the 12 months to March 2026.

Spain was also one of the few large producers to partially resist the broader trend. Its bulk wine export value rose 0.9%, even though export volumes fell 5.2%. The report said that was helped in part by a smaller Northern Hemisphere harvest, which slightly lifted revenues. By contrast, export value dropped 20.6% for New Zealand, 11.3% for Italy and 15.4% for Australia, the next most valuable bulk-producing markets cited in the study.

On the import side, the United Kingdom remained the largest buyer of bulk wine by value, with €126m in imports in the first quarter of 2026. That was down 9.7% from a year earlier. The U.K. ranked second by volume, at 1 million hectoliters in the quarter, down 3.7%.

The country breakdown for U.K. sourcing showed a mixed picture. According to the WBWE analysis, Australia was the largest source of bulk wine imported into the U.K. by volume in the 12 months to March 2026, ahead of Spain, with Australian shipments reported at 130.6 million hectoliters, down 17.8%. New Zealand’s volume, by contrast, rose 17.8% to 57.4 million hectoliters, moving it into third place in the U.K. rankings. Chile was listed at 60.1 million hectoliters, followed by South Africa at 54 million and the United States at 47 million. Some of those country figures appear to be reported on a different basis from the quarterly U.K. aggregate totals also cited in the analysis, but the report’s broader direction points to softer U.K. buying from several leading suppliers.

The data was compiled for the World Bulk Wine Exhibition by Del Rey Analysts of Wine Markets and authored by Rafael del Rey. The exhibition is scheduled to take place in Amsterdam on Nov. 30 and Dec. 1.

For producers, traders and beverage companies, the latest numbers add to evidence that bulk wine is under strain from both lower volumes and weaker value growth. That combination can make it harder for exporters to protect margins and can leave buyers, bottlers and large retail programs facing a market where pricing remains sensitive even when harvest conditions briefly support some suppliers.