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French Bulk Wine Prices Rise as Trading Volumes Slump in New Campaign

FranceAgriMer data point to tighter red and white supplies after a smaller harvest, raising pressure on lower-priced bottles.

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France’s bulk wine market opened the 2026/27 campaign with lower trading volumes and higher prices, according to FranceAgriMer’s September market note published on October 1, a signal that could later put upward pressure on entry-level wine prices and

complicate negotiations across the broader beverage retail sector.

The data cover the first six weeks of the new wine campaign, which starts in early August, and track bulk wine contracts signed between growers or cooperatives and merchants before bottling. In that early period, red and white wine volumes fell sharply in several segments, while prices rose most clearly for reds. FranceAgriMer’s figures, cited by Vinabox, showed Vin de France red bulk sales at 26,667 hectoliters, down 44%, with an average price of €60 per hectoliter, up 13%. Protected Geographical Indication, or IGP, red wines reached 48,408 hectoliters, down 30%, while their average price rose 9% to €95 per hectoliter.

White wines also posted lower volumes. Vin de France white fell 36% to 22,656 hectoliters, with the average price edging down 1% to €79 per hectoliter. IGP white dropped 37% to 36,672 hectoliters, while the average price increased 9% to €116 per hectoliter. Rosé was the main exception. Vin de France rosé climbed 45% in volume to 51,013 hectoliters, with its average price up 2% to €66 per hectoliter. IGP rosé rose 5% in volume to 69,588 hectoliters, while its average price slipped 1% to €80 per hectoliter.

Those moves point to a market where supply is tighter for reds and parts of the white segment, but more comfortable for rosé. In practical terms, bulk wine is a key pricing reference for widely sold wines, especially lower-priced and midrange products. When bulk prices for reds and whites rise at the cellar gate, retailers and beverage distributors may face pressure later in the chain, although any increase on store shelves is not automatic and often depends on delayed and difficult talks with large retail groups.

FranceAgriMer linked the tighter market to a smaller 2026 harvest. The note cites an Agreste estimate as of September 1 that put France’s 2026 wine production at 34 million hectoliters, down 6% from 2025 and 17% below the 2021-2025 average. The agency attributed the decline to both reduced vineyard area, including uprooting and abandoned plots, and weak yields caused by summer drought and heat.

That backdrop helps explain why less wine is changing hands in bulk while prices are rising. With fewer volumes available and buyers still needing to secure supply for their product ranges, competition appears stronger in the red category, where the steepest volume losses were recorded. Rosé has moved differently, with more wine available and no comparable jump in prices.

The FranceAgriMer note also gave a mixed picture of French wine exports in the first seven months of 2026. From January through July, France exported 7.36 million hectoliters worth €6.48 billion, down 2% in both volume and value from a year earlier. The average price was stable at €8.81 per liter. FranceAgriMer said the international environment remains disrupted but appears to be stabilizing.

The United States showed a partial rebound. Export volume to the U.S. reached 1.13 million hectoliters, up 5%, but export value fell 6%. The improvement in volume came after what FranceAgriMer described as a 2025 market heavily disturbed by tariffs, but the recovery came with lower prices, as the average price dropped 11%. Champagne exports to the U.S. fell 3% in volume.

The United Kingdom was one of the brighter markets. Export volume there rose 8% and value increased 4%. Sparkling wines advanced 13%, while Crémant and other protected-origin sparkling wines excluding Champagne surged 37%. Even so, volumes remained below 2020 levels.

Germany weakened further, with exports down 8% in volume and 10% in value on what FranceAgriMer called a persistently sluggish market. Champagne was one of the few positive categories there, posting a 16% gain in volume. Asia remained a declining region, dragged by China and South Korea. Belgium and the Netherlands also fell, down 8% and 7% in volume. Smaller markets offered some support, including Denmark, up 6%, and Singapore, up 16%.

Vinabox also highlighted that some foreign coverage of the FranceAgriMer note gave a different reading of the data. The publication said the original document did not support claims that French wine production was stable, that domestic consumption was rising, or that Asian demand was driving exports. According to the note, no new consumption figures were published this month, the production estimate was lower, and exports to

Asia were declining.

Imports into France also moved lower, especially for cheap Spanish bulk wine. Over the first seven months of 2026, French wine imports dropped 17% in volume to 2.78 million hectoliters and 8% in value to about €470 million. Purchases of large-volume Spanish bulk wine fell 23%, their lowest level for that period since 2009, at an average price of about €0.71 per liter.

Italian shipments to France were more stable overall, with volume up 1%, but that total hid a split trend. Large-volume Italian bulk wine declined 12%, while sparkling wine imports rose 17%, helped by a 29% jump for Prosecco. That shows French demand for some imported sparkling wines remains firm even as still-wine trade softens.

For the beverage business, the bulk market is closely watched because it often sets the tone for future price moves in bottled wine sold through supermarkets, specialty chains, and foodservice channels. Higher bulk prices for IGP reds and whites, particularly from major supplying areas such as Languedoc-Roussillon, may lead to cost pressure in basic and midrange wine assortments over the coming months. That can matter not only for wine shelves but also for broader category planning, since retailers often balance promotional budgets and margin targets across wines, beers, and spirits. At the same time, the stronger availability of rosé may help keep that category more stable in price than reds.

The FranceAgriMer figures compare current changes with the 2024/25 campaign, according to Vinabox’s report on the note. Even in that context, the contrast between colors was sharp. Reds faced the clearest squeeze in supply and the strongest increase in prices. Whites saw lower volumes too, but price moves were more mixed. Rosé stood apart with more available product and little sign of price tension.

The new campaign began at a time when France’s wine industry was already dealing with lower output, uneven export demand, and shifting import flows. The result, at least in bulk trade so far, is a market where less wine is available in several major categories and buyers are paying more to secure some of it. Whether that translates into higher retail prices for consumers will depend on how long the current supply tightness lasts and on how aggressively distributors resist passing through those increases.