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Argentina’s varietal wine shipments fell 18.7% in a flat domestic market

Non-varietal wines rose 10%, enough to keep January-through-August domestic dispatches up 0.5%

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Argentina’s domestic wine market was almost flat in the first eight months of 2026, but the small overall change masked a sharp shift away from varietal wines and a stronger concentration of shipments in Mendoza, according to a provisional report from the

National Viticulture Institute.

The institute said wine dispatched to the domestic market from January through August reached 4,771,106 hectoliters, up 21,675 hectoliters from 4,749,431 a year earlier. That was a gain of just 0.5%. In August alone, shipments slipped 0.2% from the same month in 2025, to 677,863 hectoliters.

The main change was in the mix of wines being sent to the market. Wines without a varietal designation rose to 3,353,713 hectoliters in the January-August period, from 3,049,836 a year earlier. That was an increase of 303,877 hectoliters, or 10%. Over the same period, varietal wines fell to 1,257,258 hectoliters from 1,546,926, a drop of 289,668 hectoliters, or 18.7%.

That shift changed the structure of the market. Wines without a varietal designation increased their share of shipments to 70.3% from 64.2%. Varietal wines fell to 26.4% from 32.6%. Sparkling wines accounted for 2.9% of the total and other wine categories 0.4%.

The report shows that the market’s stability depended heavily on that move toward non-varietal products. The increase in wines without varietal labeling was larger than the entire net gain in total shipments, meaning it more than offset the decline in varietals.

The color mix also changed. White wines posted stronger growth than red and rosé wines. In the first eight months, total white wine shipments rose 6.6% to 1,244,659 hectoliters. Red and rosé wines together fell 1.5% to 3,525,868 hectoliters. In August alone, white wines jumped 27.7% year over year to 204,219 hectoliters, while red and rosé wines dropped 8.7% to 473,644 hectoliters.

Varietal wines were weak in both volume and mix. Within that category, varietal whites rose 5.1% in the January-August period to 262,119 hectoliters, but varietal red and rosé wines fell 23.3% to 995,139 hectoliters. That drop explains most of the broader decline in varietals. By contrast, wines without varietal designation grew in both whites and reds, with non-varietal whites up 8.3% and non-varietal red and rosé wines up 10.6%.

Sparkling wines were one of the few categories outside non-varietal wine to show growth over the first eight months. They rose 4.9% to 140,396 hectoliters. Other wine types, a group that includes wine cocktails, gasified wines, ritual wines and special wines, increased 5% to 19,739 hectoliters.

The provincial data showed an even sharper divergence. Mendoza, the country's main wine-producing province, increased its shipments to the domestic market by 7% in the January-August period, reaching 4,335,921 hectoliters. San Juan moved in the opposite direction. Its shipments fell to 248,156 hectoliters from 493,633, a decline of 245,477 hectoliters, or 49.7%.

That left Mendoza with an even larger role in the domestic supply chain. In August, 90.9% of all wine dispatched to the domestic market came from Mendoza. San Juan accounted for 4.8%. The next provinces were La Rioja with 2.1%, Salta with 1.2%, Neuquén with 0.7% and Río Negro with 0.1%.

The institute's province-by-province figures also showed mixed results outside the two largest producers. La Rioja posted 92,946 hectoliters in January through August, up 12%. Salta fell 18.2% to 61,080 hectoliters. Neuquén declined 23.7% to 17,145 hectoliters, and Río Negro was down 13.6% to 6,444 hectoliters.

The report stressed that these figures measure dispatches from producing provinces to the domestic market. They do not necessarily represent final purchases made within those same provinces. The institute also said the data are provisional and may be revised later because of late or corrected sworn declarations from wineries and other registered operators. The database used for the report was updated through Sep. 21.

August data followed the same broad pattern as the cumulative numbers, though with a smaller change in total volume. Wines without varietal designation rose 1.9% in August to 455,966 hectoliters, while varietals fell 2.5% to 196,989 hectoliters. Sparkling wines dropped 18.1% to 21,742 hectoliters, and other wines slipped 5% to 3,167 hectoliters.

Packaging trends also pointed to a market leaning more toward lower-cost or high-volume formats. In the January-August period, bottle shipments fell 1.4% to 3,014,863 hectoliters, while tetra pak rose 5.7% to 1,640,971 hectoliters. Damajuana volumes dropped 20.6% to 97,974 hectoliters. Bag-in-box rose 2.1% to 8,899 hectoliters and cans increased 8.4% to 5,540 hectoliters, though both remained small in absolute terms. Bottles and tetra pak together accounted for 97.6% of all domestic-market dispatches.

In August alone, bottle shipments were down 2.5% from a year earlier at 434,652 hectoliters, while tetra pak increased 6% to 228,051 hectoliters. Damajuana shipments fell 32% to 11,362 hectoliters. Bag-in-box rose 91.5% to 2,924 hectoliters, cans climbed 128.4% to 644 hectoliters, and other containers increased sharply from a very low base.

The institute’s estimated per capita wine consumption for August was 1.46 liters per person, unchanged from the same month last year, while the January-August figure was 10.27 liters per person, up 0.3% from 10.24 liters in the same period of 2025.