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France’s bulk red wine sales fell 44% at the start of the 2026/27 season.

FranceAgriMer said average prices rose 13% to €60 per hectoliter following a smaller harvest.

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France’s bulk wine market opened the 2026/27 season with a sharp drop in red wine transactions and higher prices, according to a FranceAgriMer market report released on Oct. 1. In the first six weeks of the campaign, bulk sales of red Vin de France reached

26,667 hectoliters, down 44% from the reference campaign used by the agency, while the average price rose 13% to €60 per hectoliter.

The figures point to a market where less wine is changing hands even as buyers pay more for it. Based on the reported percentages, the reference volume was roughly 47,620 hectoliters, which suggests a decline of about 20,950 hectoliters. The earlier average price was about €53.10 per hectoliter, or roughly €6.90 less than the current level. Those absolute differences are only approximate because FranceAgriMer reports rounded percentage changes and, in this case, compares the current start of the season with 2024/25 rather than 2025/26.

FranceAgriMer tracks contracts for wine sold in bulk, before bottling, making the data an early indicator for the cost of entry-level and mid-range wines later sold in stores and export markets. The agency said volumes were generally lower at the start of the campaign for both red and white wines across Vin de France and IGP categories, with rosé standing out as the main exception.

The decline in red wine was also visible in the IGP segment. Bulk IGP red sales fell 30% to 48,408 hectoliters, while the average price increased 9% to €95 per hectoliter. White wines also showed weaker volumes. Vin de France white dropped 36% to 22,656 hectoliters, with its average price slipping 1% to €79 per hectoliter. IGP white fell 37% to 36,672 hectoliters, but its price rose 9% to €116 per hectoliter.

Rosé moved in the opposite direction. Bulk Vin de France rosé sales rose 45% to 51,013 hectoliters, with the average price up 2% to €66 per hectoliter. IGP rosé increased 5% to 69,588 hectoliters, while its average price edged down 1% to €80 per hectoliter. The contrast suggests a more comfortable supply situation in rosé than in red or white, where the tighter market is already showing up in prices.

The backdrop to the market is a smaller French harvest. FranceAgriMer cited an Agreste estimate, dated Sept. 1, that put 2026 wine production at 34 million hectoliters. That would be 6% below 2025 levels and 17% below the 2021-2025 average. The agency attributed the drop to a reduction in vineyard area and to weak yields linked to drought and summer heat. With less wine available, especially in categories used heavily for everyday and branded wines, price pressure has emerged

quickly in the early bulk market.

That pattern matters beyond winery and cooperative contracts. Bulk wine is a basic supply source for many bottled wines sold in supermarkets and in export channels. Higher cellar-door prices for red and some white categories can feed through into higher costs for lower-priced and mid-priced wines in the months ahead, even if the timing and scale of any increase will depend on bottlers, distributors, and retail negotiations.

The domestic market data came as France also reported weaker export performance for the first seven months of the year. From January through July, French wine exports totaled 7.36 million hectoliters worth €6.48 billion, down 2% in volume and 2% in value from a year earlier, FranceAgriMer said. The average export price was stable at €8.81 per liter.

The export numbers show an uneven picture across major markets. Shipments to the United States rose 5% in volume to 1.13 million hectoliters, but export value fell 6%, which indicates lower average prices. FranceAgriMer said the average price in that market dropped 11%, suggesting exporters had to concede on pricing to regain volumes after a disrupted 2025. Exports to the United Kingdom were stronger, with volume up 8% and value up 4%.

Other destinations remained weaker. Exports to Germany fell 8% in volume and 10% in value. FranceAgriMer described the market there as subdued. Asian markets also remained in decline, weighed down by China and South Korea, according to the report. Belgium and the Netherlands also recorded lower volumes. The overall result was a modest contraction in exports rather than a broad recovery.

Taken together, the bulk market and trade data show pressure on the French wine sector from two directions. Supply is tighter after a smaller harvest, pushing up prices in several bulk categories, especially reds. At the same time, overseas demand is not strong enough to offset the domestic strain, with total exports still slipping in both volume and value.

FranceAgriMer’s September note does not present the start of the 2026/27 campaign as a uniform market story. Red wines are seeing the steepest drop in traded volumes and the clearest price increases. White wines are also under pressure in the bulk market, though not in exactly the same way across all categories. Rosé remains more abundant and more stable on price. For producers, cooperatives, merchants, and retailers, that split is likely to shape purchasing and pricing decisions through the rest of the season.

The figures also require careful reading because the comparison base is unusual. FranceAgriMer measured the opening weeks of the current campaign against 2024/25, not against the immediately preceding 2025/26 season. That means the reported changes are valid within the agency’s framework, but they do not describe a direct year-to-year move from last season. Even so, the message from the opening weeks is clear: less bulk red wine is being traded in France, and the wine that is available is selling at a higher price.