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Italy’s 2026 wine production is projected to fall 7.22% to 41.1 million hectoliters

Drought and deliberate yield cuts reduced output in a market holding 42.6 million hectoliters of inventories

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Italy’s 2026 wine and must production is estimated at 41.1 million hectoliters, down 7.22% from a year earlier, according to European Commission harvest estimates released Thursday, a drop of about 3.2 million hectoliters from the comparable level of

roughly 44.3 million.

The decline comes after a harvest shaped by drought in several areas and by deliberate efforts to curb output. Industry groups in Italy had urged producers to reduce yields to avoid adding to large unsold stocks. The country is still carrying about 42.6 million hectoliters of wine inventories, according to the figures cited by industry representatives. That has turned a smaller harvest into a market management issue as much as an agricultural one.

At the European Union level, wine and must production is estimated at 137.4 million hectoliters, down 1.2% from last year. That means the overall EU crop would be lower by about 1.67 million hectoliters. The limited decline across the bloc reflects strong recoveries in Spain and several other producing countries that offset much of Italy’s reduction.

Spain is expected to produce 37.6 million hectoliters, up 13.4% from last year, an increase of about 4.44 million hectoliters. Germany is projected to rise from 7.5 million to 8 million hectoliters. Portugal is seen increasing from 5.9 million to 6.6 million hectoliters, and Romania from about 3.4 million to 4.4 million hectoliters. Based on the Commission’s estimates, Italy remains the EU’s largest producer by volume, ahead of Spain.

The Commission’s figures are preliminary, not final. This year, unlike in past seasons, the usual early September harvest estimates were not published. The reason, according to the original report and industry comments, is the growing risk that weather volatility linked to climate change will produce larger gaps between early forecasts and final results. That has made in-season estimates less reliable.

The French figure in the Commission table has become a specific example of that problem. The table still lists France at 33.9 million hectoliters, but French authorities published an official revision on Oct. 7 putting the country’s harvest at 34.9 million hectoliters. Because of that mismatch, the French number is best treated with caution and is not directly comparable to the other country figures in the current table.

In Italy, the lower crop is being watched closely because it follows years of pressure on both consumption and inventories. Domestic and export demand have not been strong enough to absorb existing stocks at the pace many producers wanted. For that reason, some wine protection consortia called for yield limits before and during the 2026 growing season. The goal was to avoid a new oversupply in a market already carrying substantial volumes of unsold wine.

Lamberto Frescobaldi, president of the Italian Wine Union, said the estimated crop, if confirmed, shows the sector trying to balance volume and quality. He said the overall quality outlook appears strong even though the harvest is smaller than in some past high-output years. He attributed that result to producers adapting to difficult weather conditions and prioritizing grape quality and the economic sustainability of production.

That argument reflects a broader concern in Italy’s wine sector. Producers are not only dealing with weather risks such as drought and uneven ripening. They are also trying to protect prices and margins in a market where too much supply can weigh on both. A smaller harvest, in that context, can help relieve pressure on storage and reduce the need to sell at lower prices, though the effect will depend on final output and demand in the coming months.

Paolo Castelletti, secretary-general of the Italian Wine Union, said the market will determine whether the 2026 harvest is small enough to restore better balance. He described the reduction as desirable given current conditions and said producers now hope the final harvest figures remain close to the preliminary data. He also pointed to signs of improvement in exports outside the EU, including the United States, where the group sees continued gains in September after rebounds in July and August.

The Italian estimate stands out because it combines two pressures that do not always move together. One is environmental, especially drought. The other is strategic, with some growers and consortia intentionally holding back production. That combination helps explain why a 7.22% decline is not being viewed only as a negative development inside the sector. For many producers, the more important issue this year is whether lower output can bring supply closer to demand without damaging quality.

Even with the decline, Italy’s projected 41.1 million hectoliters keeps it firmly among the world’s leading wine producers. But the 2026 season also shows how the structure of the European market is changing. Countries with weaker 2025 crops are rebounding, while others are adjusting production in response to inventories, prices, and climate risk. The result is a European harvest that is only slightly smaller overall, even as national outcomes differ sharply from one producer to another.

For traders and wineries, the next steps will depend on how closely these estimates match final harvest data and whether the recent improvement in non-EU exports continues. A rebound in Spanish production, coupled with higher volumes in Germany, Portugal, and Romania, may ease some supply concerns in the broader European market. In Italy, however, the focus remains on whether a smaller harvest can help reduce pressure from large existing stocks while supporting grape quality and market value.