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Spain’s August wine output jumped 124.7% after an unusually early harvest.

The timing shift brought 10.6 million hectoliters into cellars sooner than usual, prompting OIVE to caution that the spike may not last.

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Spain opened the 2026/27 wine campaign with a sharp rise in August production, as an unusually early harvest pushed new wine into cellars sooner than usual, according to a monthly report by the Interprofessional Wine Organization of Spain, or OIVE, based on

INFOVI data from the Ministry of Agriculture.

The report said total wine production in August, the first month of the new campaign, reached 10.6 million hectoliters, up 124.7% from the same month a year earlier. OIVE said the increase does not point to a full-season jump of the same scale, but rather to the timing of the harvest, which started especially early in many wine-growing areas. In some regions, the grape harvest began as much as 15 days earlier than normal, the report said, and in some cases it was the earliest on record.

White wines accounted for 6.4 million hectoliters of August production, up 93.3% from a year earlier. Red and rosé wines made up the remaining 4.2 million hectoliters, up 199.6%. Grape production for the month was placed at 1.51 billion kilograms, a 122.8% increase from August 2025, which the report also linked to the advanced harvest.

By region, Castilla-La Mancha led production in August with 5.45 million hectoliters, or 51.4% of the national total. Extremadura followed with 1.97 million hectoliters, equal to 18.5% of the total, and Catalonia ranked third with 1.34 million hectoliters.

Stocks also rose at the start of the campaign. Combined end-of-month holdings of wine and unconcentrated must stood at 40.1 million hectoliters on Aug. 31, up 21.9% from a year earlier, or 7.2 million hectoliters more. OIVE said that increase was also largely explained by the early arrival of product from the new crop.

Within that total, wine inventories reached 37.3 million hectoliters, up 19.7%, while unconcentrated must stocks rose to 2.8 million hectoliters, up 61.1%. Among wine stocks, red and rosé wines totaled 19.7 million hectoliters, up 10.3%, and white wines reached 17.6 million hectoliters, up 32.5%.

Castilla-La Mancha also held the largest share of stocks, with 14.3 million hectoliters of wine and must at the end of August, equal to 36% of the national total. Catalonia followed with 5.7 million hectoliters and La Rioja with 4.2 million hectoliters.

At the same time, domestic demand continued to weaken. OIVE’s estimate of wine consumption in Spain for the 12 months through August 2026 fell 8.3% from the prior 12-month period, to 8.92 million hectoliters. That was 805,084 hectoliters less than in

the 12 months through August 2025.

The decline was heavier in red and rosé wines, where estimated consumption dropped 13.5% to about 5 million hectoliters. White wine consumption was more stable, slipping 0.6% to 3.9 million hectoliters.

The report said winery inflows of domestic-origin wine in August fell 3.3% to 1,147,432 hectoliters, while outflows fell 4.4% to 1,717,500 hectoliters. The net difference between inflows and outflows was 570,068 hectoliters, down 6.5% from August 2025.

Wine sent to other industrial uses increased at the start of the campaign. In August, 141,334 hectoliters were directed to producers' own operations, distillation and vinegar-making, up 16.8% from a year earlier. Of that volume, 110,188 hectoliters went to producers' own operations, a category that includes uses such as aromatized wines, vermouth and sangria, up 19%. Another 14,359 hectoliters went to distillation, up 515.7%, while 16,787 hectoliters went to vinegar production, down 35.6%.

Spain's export data, which come from the tax agency AEAT and were available through July 2026, showed that the 2025/26 campaign ended in negative territory for overseas sales. Wine exports for the 12 months from August 2025 through July 2026 fell 9.5% in volume to 17.45 million hectoliters and 6.1% in value to €2.79 billion. That represented a drop of about 1.8 million hectoliters and €179.5 million from the previous campaign.

In July alone, exports rose 2% in value to €241.8 million but fell 3.4% in volume to 1.7 million hectoliters, the report said.

Both packaged and bulk wine exports declined over the full campaign. Packaged wine exports fell 6.5% in volume to 787.9 million liters and 6.4% in value to €2.27 billion. Bulk wine exports dropped 11.8% in volume to 9.6 million hectoliters and 4.5% in value to €516.1 million. The average price for bulk exports rose 8.3% to €54 per hectoliter, while the average price for packaged wine was stable at €2.88 per liter.

Imports moved in the opposite direction. Spain imported 1,080,553 hectoliters of wine in the 2025/26 campaign, up 17.4% from the previous year, while the value of those imports rose 7.9% to €340.2 million. The average import price fell 8.1% to €315 per

hectoliter.

OIVE said the rise in imports was mainly driven by bulk wine. Bulk import volumes increased 35%, adding 169,623 hectoliters during the campaign.

The August report points to a Spanish wine market entering the new season with higher early production and larger inventories, but also with softer domestic consumption and weaker export performance than in the previous campaign. OIVE said the early harvest makes August data especially sensitive to timing effects, and the full shape of the 2026/27 campaign will become clearer in the coming months as harvest and stock figures continue to be updated.