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Spanish Wine Exports to the U.S. Fell 21% in the First Half of 2026

Weaker U.S. demand, lower prices and tariff uncertainty deepened pressure on Spain’s most important market outside the E.U.

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Spanish wine exports to the United States fell sharply in the first half of 2026, adding pressure to one of Spain’s most important overseas markets at a time when U.S. wine demand is weakening and trade conditions remain unsettled.

According to data from the Interprofessional Wine Organization of Spain, or OIVE, Spain shipped €132.9 million worth of wine to the U.S. in the first six months of the year, down 21% from the same period in 2025. Export volume fell 16.1% to 28.5 million liters. Even with that decline, Spain remained the fourth-largest wine supplier to the U.S. by both value and volume.

The setback came as the broader U.S. import market also contracted. OIVE said total U.S. wine imports dropped 25.2% in value in the first half of 2026. Total purchases of bottled wine reached 416.5 million liters, while the average price fell 15.4% to €5.62 per liter.

The figures point to a market that is still critical for Spanish producers but has become more difficult to navigate. In 2025, the U.S. imported €331.1 million in Spanish wine, down 15.3% from the previous year, but it still ranked as Spain’s top non-European Union market by value. That standing helps explain why producers are treating the current slowdown as a challenge to manage rather than a reason to pull back.

The pressure is coming from several directions at once. Tariffs and shifting U.S. trade rules have increased uncertainty for exporters and importers. Consumption trends have turned weaker. Distribution has also become more fragile, raising concerns about how wine reaches shelves and restaurant lists even when demand exists.

A market analysis cited by Wine Meridian and originally published by Spanish Wine Lover said many operators view the uncertainty itself as one of the main problems. U.S. tariff policy changed several times this year, and new measures tied to Section 301 took effect on July 24. For European Union products, the mechanism can in some cases result in a total tariff ceiling of 10% when the most-favored-nation duty is included. But for importers and wineries, the bigger issue has often been the difficulty of planning purchases, setting prices and deciding on investments when the rules can change quickly.

That instability matters beyond the border because wine costs pass through a long chain that includes producers, importers, distributors and retailers. Any increase in costs can be magnified along the way. For the broader beverage business, a decline in Spain’s leading non-EU wine market by value may force companies to revisit pricing,

margins and distribution strategies, especially for portfolios that depend on imported wines to balance sales across beer, spirits and other categories.

Distribution problems have added another layer of risk. Republic National Distributing Company, one of the largest U.S. distributors of wine and spirits, entered a court-supervised restructuring process in late July and said it was seeking potential buyers while reshaping its remaining operations, according to the market report. For foreign producers, especially smaller wineries, access to distribution is not just a logistical issue. It determines whether a brand can maintain a national or regional presence in the U.S. market at all.

Some Spanish companies have tried to limit the damage by preparing in advance. The report said Gil Family Estates increased inventories in the United States, strengthened its import structure and kept a commercial team in place there, steps that helped delay the impact of higher costs. Those kinds of moves, however, are easier for larger companies than for smaller producers with fewer resources.

The demand side is also changing. Industry observers say Americans are drinking less wine, a shift linked to several factors including generational changes, health concerns, inflation and tighter household budgets. That does not necessarily mean consumers are moving only to cheaper bottles. Because market value is falling less steeply than volume, producers see signs that some buyers are purchasing wine less often but paying closer attention to quality and distinction when they do.

That trend could still leave room for Spanish wine in the U.S., even as overall volumes fall. Producers and analysts point to Spain’s price-to-quality positioning, native grape varieties and regional diversity as advantages in a more selective market. Wines from Bierzo and the Mencía grape have drawn more attention from importers and consumers looking for wines with a clear geographic identity. Sparkling wines from Spain have shown resilience, and producers also see opportunities for Albariño from Rías Baixas, Sherry, Garnacha and Tempranillo. Dealcoholized wines are also posting double-digit growth in some portfolios, though from a low base.

The challenge for Spain is that the U.S. market now appears to reward differentiation more than scale. Producers can no longer rely on volume growth alone in a country where overall wine consumption is under pressure. Instead, they face a more selective market shaped by tariffs, softer demand and a tighter distribution system, while still being too important to ignore.