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Italian wine exports to the U.S. rebound nearly 17% after steep tariff-driven losses

Sparkling wines led the recovery after a 12-month slide wiped more than €340 million from sales

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Italian wine exports to the United States are showing signs of recovery after a year marked by tariff losses, but the market remains fragile and much of the resilience is still coming from sparkling wine.

Data published Tuesday, November 3, by Fondazione Qualivita, citing reporting by La Stampa and figures from the Unione Italiana Vini observatory, showed that Italian wine exports to the U.S. fell 17% from April 2025 through March 2026 after 15% tariffs were introduced. The drop was equal to more than €340 million in lost sales. Export volumes fell 9%, reaching their lowest level in 10 years.

The pressure continued into the opening months of 2026. According to the report, the value of Italian wine exports to the U.S. was down 13% in the first part of the year, weighed down mainly by the added tariffs. But the trend improved during the summer. In the July-to-September quarter, exports to the U.S. rebounded by nearly 17%, pointing to a partial recovery in orders from Italy's most important foreign market for wine.

The U.S. remains the top destination for Italian wine and the most strategic one for producers. It accounts for 24% of Italy's wine exports, or about €2 billion, according to the figures cited in the report. That makes the recent recovery closely watched not only by wineries but across the broader beverage business, where changes in U.S. demand can affect order planning, inventories and exposure to trade risk for exporters, importers and distributors.

The recovery has not been uniform across categories. Sparkling wines were the only segment that continued to grow, though only slightly, with Prosecco leading that performance. The report also said Prosecco was performing strongly in France. High-end wines such as Brunello and Barolo have held up better than the broader market, even as grape prices have fallen sharply. Larger wine companies have been under more pressure than smaller producers, according to the report.

Those differences suggest that brand position and product mix are shaping how Italian producers absorb the impact of tariffs. Premium labels have been more resilient, while sparkling wine has remained the clearest source of support for export sales. For producers with greater exposure to the U.S., the recent pickup offers some relief, but it follows a much deeper contraction over the previous 12 months.

Despite the weaker market, Italian wineries have continued to invest in their U.S. presence. The report said 300 companies took part in the third edition of Vinitaly USA, the first held in New York after two earlier editions in Chicago. The event drew 3,000 attendees from 20 U.S. states and 40 countries.

Producers used the fair to meet buyers and distributors and to seek commercial agreements tied not only to wine sales but also to tourism, through contacts with tour operators.