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Spain lowers its outlook for dry-farmed wine-grape yields

The ministry’s first autumn estimate put dry-farmed vineyards 14% above 2025, with irrigated vineyards 2% below it

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Spain’s Agriculture Ministry said on Monday, November 9, that its latest field estimate points to a smaller gain in average yields for dry-farmed wine-grape vineyards than previously expected, while irrigated vineyards are now running slightly below the 2025 level.

The update came through the Survey on Crop Areas and Yields, known by its Spanish acronym Esyrce. In its third yield estimate for vineyards, based on September data and described as the first autumn assessment, the ministry put average yields for dry-farmed wine grapes at 5,379 kilograms per hectare. That is 14% above 2025.

For irrigated vineyards, the same estimate placed average yields at 8,886 kilograms per hectare, or 2% below the 2025 figure.

The ministry said the September data provide an estimate that is closer to actual conditions in the field than earlier projections. That matters because the autumn reading comes later in the season, when more of the crop's final performance is visible.

The figures show a split between Spain's two main vineyard production systems. Dry-farmed vineyards are still expected to outperform the prior year, but with a more moderate increase than earlier estimates had suggested. Irrigated vineyards, by contrast, are now expected to post a slight decline from 2025.

For the wine business, those numbers are important because they shape expectations for grape availability before final harvest and production data are fully settled. A stronger dry-farmed crop could ease some supply pressure in parts of the market, while weaker irrigated yields could limit that effect in others. For wineries, cooperatives and bulk traders, the balance between the two may influence how they plan purchases, inventory and pricing in the coming months.

That is especially relevant in Spain, where large harvest shifts can affect not only domestic winemaking but also export flows, including the bulk wine trade. A revised yield outlook may lead buyers and sellers to adjust assumptions about grape costs and wine supply, even if the final commercial impact will depend on regional results, quality and how much fruit actually reaches wineries.

The Esyrce estimate does not replace final production data, but it is closely watched because it offers a national benchmark while the campaign is still taking shape. In this case, the ministry's September reading suggests that Spain's dry-farmed vineyards remain on track for a year above 2025, though by a narrower margin than previously indicated, while irrigated vineyards are performing slightly below the prior year.

The release adds a new reference point for a market that has been looking for clearer signals on the size of the 2026 crop. With dry-farmed yields estimated at 5,379 kilograms per hectare and irrigated yields at 8,886 kilograms per hectare, the latest ministry survey gives producers and traders a more current picture of vineyard performance as the season moves into its final accounting stage.