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Spain’s wine cooperatives expect a 34 million hectoliter harvest in 2026/27

The forecast would mark a fourth straight campaign below 37 million hectoliters, adding pressure on producers to seek growth in new markets and dealcoholized wine

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Spanish wine cooperatives are preparing for another small harvest while facing weaker demand at home and abroad, a combination that is pushing producers to broaden their product range and look for new buyers.

At a sector meeting held in Cariñena, in the northeastern province of Zaragoza, on Wednesday, November 11, Cooperativas Agro-alimentarias de España said it expects national wine and grape must production to reach about 34 million hectoliters in the 2026/27 campaign. If that estimate is confirmed, it would mark Spain’s fourth straight campaign below 37 million hectoliters.

The forecast comes after an especially early harvest shaped by successive heat waves that cut vineyard yields, according to the organization. Even so, the group said grape quality is strong.

The production outlook is arriving at a difficult moment for one of the world’s largest wine exporters. Cooperativas Agro-alimentarias said domestic wine consumption fell 8.3% in the 12 months through August 2026, while Spanish wine exports in the previous campaign dropped 9.4% by volume. In practical terms, lower output combined with softer demand could influence inventories, pricing and trade flows across the beverage business, especially in export markets where Spain has long been a major supplier.

The organization discussed those pressures at its national wine conference in Cariñena, which was organized with the support of Cooperativas Agroalimentarias de Aragón and sponsored by Santander Agro. About 100 representatives from cooperatives in different regions, along with industry professionals and specialists, attended to review market conditions and possible areas for growth.

Fernando Ezquerro, president of the wine sector council at Cooperativas Agro-alimentarias de España, said Spanish producers need to use new channels to raise awareness of Spanish wine and encourage consumption both inside and outside the country. He pointed in particular to international tourism as an underused opportunity.

Spain receives close to 100 million foreign visitors each year, Ezquerro said, yet many are not fully aware they are visiting one of the leading wine-producing countries in the world. That gap, in the view of the sector, creates room to link tourism more directly with wine sales, winery visits and broader promotion of wine culture.

Ezquerro also said the industry must do more to attract younger consumers, arguing that wine needs to be presented not only as a drink but as part of a wider cultural and rural experience. In that effort, cooperatives are placing growing weight on wine tourism as a way to introduce new consumers to vineyards, production methods and local food traditions.

Diversification was one of the central themes of the conference. Producers said they can no longer rely only on the traditional wine market and need to respond to changing drinking habits. One of the product areas discussed was dealcoholized wine, which cooperatives described as a possible source of innovation and growth rather than a replacement for conventional wine. The idea, according to the discussions at the event, is to add options for consumers and create new drinking occasions that may not fit standard wine consumption.

That strategy reflects a broader change in the beverage market, where moderation, health concerns and shifting lifestyles are affecting demand patterns across wine, beer and spirits. For wine cooperatives, the expansion of lower- or no-alcohol offerings may provide a way to protect shelf space and reach consumers who might otherwise leave the category entirely.

The conference also addressed the future of the European Union’s Common Agricultural Policy for 2028-2034, an issue with direct importance for Spanish wine growers as budget and support negotiations move forward. While the organization did not announce specific policy outcomes, it said the next framework will be important for the sector at a time when growers are dealing with climate stress, market volatility and pressure on profitability.

International markets were another major point of focus. Cooperatives said they are trying to identify countries with stronger growth potential and improve the market position of Spanish wines abroad. That push comes as exporters try to recover from the

recent decline in overseas sales volume and adapt to more difficult conditions in established markets.

Cooperativas Agro-alimentarias de España represents 398 cooperative wineries, which the group said account for about 70% of Spain’s total wine production. Because of that scale, the trends discussed in Cariñena offer a broad view of the challenges facing much of the country’s wine sector.

The latest forecast suggests that even with good grape quality, Spanish producers are entering the 2026/27 campaign with little room for complacency. Lower harvest volumes, falling domestic consumption and weaker exports are increasing pressure on cooperatives to find value in new products, new consumers and new markets rather than depend only on traditional wine sales.