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EU Wine Output Will Fall 4% in 2026/2027, Farm Group Says

Copa-Cogeca said weaker demand, lower prices and a 6.8% drop in exports are deepening pressure on producers

Friday, November 13, 2026



European wine producers are heading into the 2026/2027 season with lower output, weaker demand and softer exports, according to harvest estimates released by Copa-Cogeca on Thursday, November 12, underscoring the pressure facing one of the European Union’s largest farm industries.

The farm group said EU wine and must production is expected to reach 133.6 million hectoliters in the 2026/2027 campaign, down 4% from the previous harvest and about 8% below the average of the past five campaigns. The figures point to a continuing decline in European wine production as growers deal with more unstable weather and a market that is changing at the same time.

Italy, Spain and France remained the bloc’s largest producers, together accounting for about 82% of total EU wine and must output. Copa-Cogeca said Italy represented 30% of production, Spain 27% and France 25%.

The group said this year’s harvest again showed the growing effect of adverse weather on vineyards across Europe. Producers reported repeated drought, long heat waves, spring frosts and hailstorms in many regions, cutting yields and increasing uncertainty from one season to the next. Copa-Cogeca said climate instability has become one of the main forces shaping European viticulture, making annual production swings more pronounced.

The production decline is also part of a broader trend. Copa-Cogeca said average annual EU wine production stood at about 157 million hectoliters between 2020 and 2025, but output has generally moved lower since the 2020/2021 harvest. The latest estimate suggests that lower harvests are no longer a short-term problem in some areas but part of a wider adjustment across the sector.

Demand has been moving in the same direction. Copa-Cogeca estimated global wine consumption at 221 million hectoliters, its lowest level in more than three decades. It said a long growth period from 1996 to 2007 was followed by relative stability until 2017, when consumption began a sustained decline. Since 2022, that drop has accelerated both inside the EU and in major markets outside the bloc.

The EU’s role in global wine consumption has also narrowed. Copa-Cogeca said the bloc accounted for nearly 60% of world wine consumption in 2000, compared with about 48% now. Falling demand has pushed down traded volumes and prices across the value chain, with red and rosé wines among the categories most affected. Base wines have seen some of the sharpest declines, the group said.

Opportunities are still emerging in newer markets, but Copa-Cogeca said the gains there have not been enough to offset shrinking consumption in countries with long-established wine drinking traditions. That imbalance is adding to pressure on growers, cooperatives, bottlers and exporters already dealing with rising costs.

For the broader beverage business, the combination of lower production, weak demand and softer export sales could weigh on margins and lead companies to rethink purchasing, inventory and commercial plans. The pressure is especially acute for wine producers and traders, but it can also affect distributors and retailers whose portfolios rely on steady sales in premium bottled wine and sparkling categories.

Trade data showed the strain clearly. Between September 2025 and August 2026, EU wine exports to countries outside the bloc totaled 15.4 billion euros, down 6.8% in value from the prior 12-month period, while export volumes fell 3.3% to 27.5 million hectoliters, according to Copa-Cogeca.

Most wine categories posted declines. Exports of protected designation of origin wines fell 7.6%, varietal wines dropped 6.7% and protected geographical indication wines were down 4.9%. Wines without a geographical indication were the only major category to remain relatively stable.

The trade picture varied by format. Bulk wine was one of the few segments to grow, rising 5%, and bag-in-box exports increased 3.4%. Bottled wine exports fell 7.5%, while sparkling wines declined 6.2%, a sign that higher-value segments have not been spared by weaker international demand.

Among major export destinations, shipments to the United States fell 15.3%. Exports to Canada dropped 11%, Switzerland 9.2% and the United Kingdom 3.9%. Russia and Hong Kong were among the few markets to post gains, rising 17.5% and 10.9%, respectively.

Trade within the EU also weakened. Copa-Cogeca said intra-EU wine trade fell 9.8% in value and 13.4% in volume, though average unit values continued to rise. That suggests lower volumes are not being fully offset by pricing, even as some products sell at higher prices per unit.

Luca Rigotti, president of Copa-Cogeca’s Wine Working Party, said the new harvest estimates confirm the scale of the changes under way in the sector. In comments released with the figures, Rigotti said European wine producers are working in increasingly difficult conditions shaped by unpredictable weather, higher production costs linked to conflicts and geopolitical tensions, a structural fall in wine consumption and new trade and market-access barriers.

He said those pressures are weighing on producers across Europe, even as the sector continues to show resilience and an ability to adapt. Rigotti said the industry will need to keep investing in innovation, sustainability and quality promotion while diversifying its offer, looking for new markets and trying to rebuild stronger ties with consumers, especially younger generations.

The new data present a difficult backdrop for an industry that remains central to rural economies in many parts of Europe. With harvest volumes lower, demand weaker and exports under pressure in several key markets, producers are entering the new campaign with less room to absorb weather shocks or commercial setbacks.