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Spain’s dryland vineyard prices fell 3.3% in 2025, ending four years of gains

La Rioja posted the steepest dryland decline as average prices fell to 14,844 euros per hectare nationwide

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The average price of dryland vineyard land in Spain fell 3.3% in 2025 to 14,844 euros per hectare, ending four consecutive years of gains, while irrigated vineyard land rose 0.3% to 17,790 euros per hectare, according to the Agriculture Ministry’s 2025 Land

Price Survey and a report by the Spanish Wine Interprofessional Organization, known as OIVE. The average price for vineyard land as a whole slipped 0.1% to 16,317 euros per hectare.

The figures measure the value of land used for wine grapes for processing. They do not reflect income from grape or wine sales, and they do not directly measure farm profitability. Even so, they offer a broad view of how investors and growers are valuing vineyard land across Spain.

The national average changed little from 2024, but the stability masked wide regional differences. In dryland vineyards, La Rioja posted the sharpest drop, with prices falling 11%. In irrigated vineyards, Aragón recorded the largest increase, with prices rising 35.6%.

The drop in dryland vineyard prices meant a decline of 514 euros per hectare from 15,358 euros in 2024. Until 2025, that segment had risen every year since 2020, when the average stood at 14,023 euros. Even after the latest decline, dryland vineyard land remained 5.9% above its 2020 level.

Irrigated vineyard land moved in the opposite direction, but only slightly. Its national average rose by 55 euros per hectare from 2024. Even with that increase, irrigated land remained below the 18,802 euros per hectare recorded in 2023. Because irrigated land edged up while dryland land fell, the gap between the two widened. In 2025, irrigated vineyard land cost an average of 2,946 euros more per hectare than dryland land, up from a difference of 2,377 euros a year earlier. In relative terms, the premium widened from 15.5% to 19.8%.

For all vineyard land combined, the 2025 average stayed below the recent peak of 16,795 euros per hectare reached in 2022. The 2025 figure was 478 euros lower, or 2.8% below that high. Over a five-year period, the trends diverged. Dryland prices rose 5.9% from 2020, while irrigated prices fell 5.3% and the combined average slipped 0.9%. The ministry’s documentation also notes a statistical base change, with one base used through 2019 and another from 2020 onward, which should be considered when comparing longer stretches of the series.

Across the regions, the decline in dryland prices was broad but not universal. Of the 14 autonomous communities with reported dryland figures, nine posted declines in 2025, four rose and one was unchanged. For irrigated vineyards, the ministry reported data for eight regions. Five of those rose and three fell. Blank entries in the ministry tables mean no price or annual change can be assigned to the remaining territories.

La Rioja had the steepest declines in both categories. Dryland vineyard land in the region fell 11% to 35,723 euros per hectare from 40,155 euros, a loss of 4,432 euros per hectare. Irrigated vineyard land dropped 8.7% to 40,639 euros per hectare, down 3,870 euros from 2024. Despite the decline, La Rioja still had the highest irrigated vineyard price among the regions listed in the survey. Compared with 2020, La Rioja's prices were down 11.3% for dryland vineyards and 13.1% for irrigated vineyards.

In dryland vineyards, the Canary Islands had the highest listed average at 64,950 euros per hectare, unchanged from the previous reading. The ministry has not updated that figure since 2021, according to the report. Galicia followed at 59,227 euros per hectare, down 2.1%, and the Basque Country stood at 53,828 euros, down 6.3%. The falls amounted to 1,246 euros per hectare in Galicia and 3,597 euros in the Basque Country. Even after those declines, both regions remained well above the national dryland average.

At the other end of the market, Murcia had the lowest dryland vineyard price at 5,239 euros per hectare, though that still represented a 2% increase from 2024. The gap between regions remained very wide. Based on the ministry's listed figures, dryland vineyard land in the Canary Islands was 12.4 times as expensive as in Murcia.

Murcia also had the lowest irrigated vineyard price among the eight regions with data, at 10,037 euros per hectare, up 2.6%. Aragón was only slightly above that level at 10,997 euros per hectare, but its annual gain was by far the strongest in irrigated vineyards.

Aragón posted the largest percentage increases in both vineyard categories in 2025. Dryland vineyard land rose 9% to 6,694 euros per hectare. Irrigated vineyard land climbed 35.6% from 8,111 euros to 10,997 euros, a jump of 2,886 euros in a single year. Even after those increases, Aragón's prices remained below the national averages

for both dryland and irrigated vineyards. From 2020 to 2025, irrigated vineyard prices in Aragón rose 54.4%.

Castilla-La Mancha showed a split picture. Dryland vineyard prices fell 4.7% to 7,369 euros per hectare, while irrigated vineyard prices rose 0.5% to 14,830 euros. That left a gap of 7,461 euros between the two categories, meaning irrigated vineyard land was a little more than twice as expensive as dryland land in the region. Compared with 2020, dryland prices in Castilla-La Mancha were still up 3.5%, while irrigated prices remained 2.6% lower.

Extremadura also moved in opposite directions depending on the type of vineyard. Dryland land fell 4.5% to 12,401 euros per hectare, while irrigated land rose 9.3% to 20,536 euros. The increase interrupted a run of annual declines in irrigated vineyard prices from 2021 through 2024, but the price still remained 17.6% below the 24,915 euros per hectare recorded in 2020.

Castilla y León recorded one of the sharpest contrasts within a single region. Dryland vineyard prices rose 5.7% to 14,315 euros per hectare, while irrigated vineyard prices fell 7.4% to 22,883 euros. That was a loss of 1,833 euros per hectare in irrigated land from 2024 and marked the fifth straight annual decline in that category. Over the full 2020-2025 period, dryland vineyard land in Castilla y León increased 28.8%, rising from 11,111 euros per hectare, while irrigated vineyard land fell 30.6%, dropping from 32,950 euros.

Navarra posted more moderate declines. Dryland vineyard land fell 1.4% to 14,100 euros per hectare, while irrigated land slipped 1.1% to 32,372 euros. That made Navarra the second most expensive irrigated vineyard market in the survey, behind La Rioja.

Catalonia and Madrid also reported lower dryland prices. Catalonia fell 3.1% to 22,030 euros per hectare, and Madrid declined 3.2% to 12,094 euros. In the Valencia region, dryland vineyard prices fell 1.9% to 11,598 euros per hectare, while irrigated land rose 1.1% to 17,661 euros. Both categories there remained above their 2020 levels, with cumulative gains of 22.1% for dryland vineyards and 24.4% for irrigated vineyards.

Andalusia, for which the ministry did not provide irrigated vineyard figures in the table cited by the report, recorded a 0.9% increase in dryland vineyard prices to 19,286 euros per hectare. That left dryland vineyard land in the region 18.9% above its 2020 level.

The longer historical trend described by OIVE shows that vineyard land prices in Spain have moved within a relatively narrow range in recent years, even as individual regions have seen much larger swings. The overall vineyard average has stayed above 16,000 euros per hectare since 2018, with 2022 still standing as the high point of the series. In 2025, that stable national picture was driven by very different regional markets, from sharp declines in La Rioja to rapid gains in Aragón and continued wide gaps between the country’s most expensive and least expensive vineyard land.