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U.S. rebound lifted Italian wine exports 5.1% in August

Shipments for the first eight months still fell 3%, underscoring a fragile recovery tied largely to American demand

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Italian wine exports showed signs of improvement in August, but the recovery remained uneven and still depended heavily on the United States, according to provisional Istat data analyzed by WineNews on Friday, November 13.

Between January and August, Italy exported wine worth €4.85 billion, down 3% from the same period of 2025. That was an improvement from the 6.2% drop recorded at midyear and the 5.3% decline reported at the end of July. In August alone, exports reached €506.8 million, up 5.1% from August 2025.

The U.S. market was the main reason the overall decline narrowed. Sales to the United States, Italy's largest foreign market for wine, totaled €1.1 billion in the first eight months of the year, still down 8.3% from the same period of 2025. But the cumulative drop had been 11.2% through July, and August brought a sharp rebound. Exports to the United States rose to €112.1 million in August from €92.5 million a year earlier, an increase of 21.1%.

That jump was large enough to change the average for the year so far, but not large enough to prove that demand has fully turned. Based on the published values, the total decline in Italian wine exports through August was about €150 million from the comparable 2025 period. The shortfall in the U.S. market alone was close to €100 million, which suggests that roughly two-thirds of the overall setback came from that one country. The figures are approximate, but they show how strongly Italy's export performance still rises and falls with the American market.

The data also remain incomplete. WineNews noted that volume figures are not yet available, which means it is still not possible to separate changes in physical shipments from shifts in prices or product mix. That matters in a business where premium labels, sparkling wines, and bulk shipments can move the value data in different ways.

Other major export destinations remained weaker through August. Germany brought in €701.4 million worth of Italian wine, down 5.5% from a year earlier. The United Kingdom also fell 5.5%, to €479.1 million. Canada declined 6.1%, to €265.8 million. China was the main exception. Exports there rose 21.7% to more than €51 million, with WineNews describing the increase as robust and driven mainly by sparkling wines. Even so, China still accounted for only a small share of Italy's total wine exports, which limits its ability to offset weakness in the larger Western markets.

A separate industry reading points to the same caution. Tenute agricole 24, in a weekly roundup citing estimates from the observatory of the Unione Italiana Vini, said exports to non-European Union markets rose 8% by value in the third quarter, with the United States up 17%. But the cumulative picture for the first nine months remained negative, at -3% for non-EU markets and -6% for the United States. That suggests the improvement may be real but still fragile.

The same roundup said part of the recent U.S. rebound could reflect importers rebuilding inventories rather than a clear increase in consumer demand. That distinction matters. A rise in orders from distributors can lift export data in the short term even if bottles are not moving faster off store shelves and restaurant wine lists. For wineries, importers, and the wider beverage trade, that can affect decisions on export planning, pricing, and stock management. If the recent U.S. strength is mainly a restocking cycle, it may not support a lasting recovery in shipments.

The export figures also need to be read against the supply situation inside Italy. As of October 31, wine stocks in cellars stood at 47.7 million hectoliters, up 7.2% from a year earlier. Stronger exports can help reduce that inventory, especially after months of slower foreign demand. But a 3% decline through August, combined with fuller cellars, still points to pressure on producers to keep sales moving in the final part of the year.

The picture, then, is less about a broad-based turnaround than about a partial improvement led by one market. The United States remains the decisive factor for Italian wine abroad, both when demand weakens and when it rebounds. September data are likely to show whether August marked the start of a steadier recovery or whether it was an isolated month boosted by importer buying.