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European Union wine exports fell 6.8% to €15.4 billion

U.S. sales fell 15.3%, reflecting sharper weakness in bottled and sparkling wines than in lower-cost bulk formats

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European Union wine exports to countries outside the bloc fell 6.8% in value between September 2025 and August 2026, dropping to €15.4 billion, according to figures presented at a Copa-Cogeca wine meeting in Brussels on November 13 and published by Legacoop Agroalimentare. Export volumes also declined, down 3.3% to 27.5 million hectoliters, adding to signs of strain across a sector already dealing with lower

harvests, weak demand and high inventories.

The data point to broad pressure on the EU wine market, with some of the biggest destination countries recording clear declines. Sales to the United States fell 15.3% in value over the period, while exports to Canada dropped 11%, to Switzerland 9.2% and to the United Kingdom 3.9%. Two markets moved in the opposite direction, with Russia up 17.5% and Hong Kong up 10.9%, but those gains were not enough to offset losses in larger traditional destinations.

Trade data also showed a shift in the mix of products being sold abroad. Bulk wine exports rose 5%, and bag-in-box shipments increased 3.4%. Bottled wine exports fell 7.5%, and sparkling wine declined 6.2%. That pattern suggests weaker performance in higher value packaged categories, even as lower cost formats held up better.

For drinks companies, the drop in the main export markets could increase pressure to rethink market exposure, pricing and stock management in the world’s largest wine-exporting region. Producers may also face tougher decisions on how to balance supply with slower demand in core markets.

The export decline came as the EU’s 2026/27 wine and must production was estimated at 4% below the previous harvest and about 8% under the average of the past five years. Copa-Cogeca’s figures, which remain subject to revision pending confirmation by national statistical authorities, were discussed at a meeting attended by Legacoop Agroalimentare President Cristian Maretti and Valentina Sourin, the group’s head of wine. According to Legacoop, participants also discussed the future of the European Union’s Common Agricultural Policy, sector budgets, co-financing rules, the scope of support measures and naturally low-alcohol wines.

Italy, Spain and France remained the EU’s dominant producers, accounting together for about 82% of total output. But weather problems again weighed on production in several regions. Drought, heat waves, spring frosts and hail reduced yields across parts of the bloc, according to the organizations. The smaller harvest has not eased pressure on the market because it has been accompanied by weak consumption, falling prices and still-elevated stocks.

Global wine consumption was estimated at 221 million hectoliters, its lowest level in more than 30 years. The EU’s share of global wine consumption has also narrowed, from nearly 60% in 2000 to 48% now, according to the figures presented in Brussels. Red and rosé wines, along with basic wines, were described as the most exposed segments.

Italy was still estimated to be the world’s largest producer, with 41.1 million hectoliters, but that figure was down 7.6% from 2025 and roughly 10% below the five-year average. The sharpest declines were reported in southern regions hit by drought and high temperatures, with Sicily and Abruzzo among the areas under the most pressure.

Spain was estimated to increase production by 3% to 34.5 million hectoliters, although low prices continued to hurt vineyard profitability. France was expected to produce 33.8 million hectoliters, down 2% from 2025 and about 15% below its five-year average, while the country also continued a large vineyard removal program.

Luca Rigotti, who chairs the Copa-Cogeca wine working group, said the sector needs more investment in innovation, sustainability and quality, along with broader product diversification and access to new markets. The discussion in Brussels also focused on how to give producers more effective market-management tools and enough support to adapt to increasingly unstable climate conditions and weaker commercial trends.