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EU wine exports earned 6.8% less from non-EU markets over the past year

Volumes fell 3.3% to 27.5 million hectoliters, reflecting weaker returns from bottled and sparkling wine

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European wine exports to markets outside the European Union brought in less money even as the drop in sales volumes was smaller, according to figures presented at a Copa-Cogeca wine meeting in Brussels on November 13, highlighting weaker returns

for the sector during the past year.

From September 2025 through August 2026, EU wine exports to third countries reached €15.4 billion, down 6.8% from the previous 12-month period, while export volumes fell 3.3% to 27.5 million hectoliters. The figures exclude trade between EU member states and cover wine exports measured by value, volume and average export value.

The wider gap between the decline in export revenue and the decline in physical volumes suggests that the sector earned less per unit sold. Based on the published totals, the average export value was about €5.60 a liter, an implied drop of roughly 3.62% from the prior period. That average does not by itself prove a direct price cut across the market, because it also reflects changes in product mix, packaging and destination markets.

The data were discussed as European wine producers face pressure from both supply and demand. Copa-Cogeca and Legacoop Agroalimentare said the 2026 harvest points to another difficult year, with extreme weather affecting vineyards in several countries and wine consumption continuing to weaken in many traditional markets.

The export slowdown was especially visible in some of the EU’s largest destinations. Sales to the United States fell 15.3% by value over the 12 months through August 2026. Exports also declined to Canada, down 11%, Switzerland, down 9.2%, and the United Kingdom, down 3.9%. Two markets moved in the opposite direction, with exports to Russia rising 17.5% and shipments to Hong Kong up 10.9%.

By product format, only bulk wine and bag-in-box posted growth. Bulk wine exports rose 5%, while bag-in-box exports increased 3.4%. Bottled wine exports fell 7.5%, and sparkling wine was down 6.2%, a sign of weakness in higher-value segments that usually support export earnings.

The export figures were presented alongside early estimates for the 2026/27 EU wine and must campaign. Production in the European Union is expected to fall 4% from the previous harvest and stand about 8% below the five-year average. Italy, Spain and France remain the bloc’s dominant producers and together account for about 82% of

total EU output, but all three markets continue to deal with weather-related disruptions and softer demand.

Drought, heat waves, spring frosts and hail reduced yields in many growing areas, according to the organizations. That pressure on production has come at the same time as lower consumption, weaker prices and still-high inventories, making it harder for producers to recover margins through trade.

Global wine consumption is estimated at 221 million hectoliters, the lowest level in more than 30 years, according to the figures cited at the meeting. The EU's share of world wine consumption has also narrowed, falling from nearly 60% in 2000 to 48% now. Red and rosé wines, along with basic table wines, were described as the categories under the greatest pressure.

Italy is still expected to remain the world's largest producer, with output estimated at 41.1 million hectoliters in 2026. But that would represent a 7.6% drop from 2025 and about 10% below the five-year average. Southern regions have been hit hardest by drought and heat, with Sicily and Abruzzo among the areas reporting the sharpest declines.

Spain is projected to produce 34.5 million hectoliters, up 3%, though vineyard profitability remains under pressure from low prices. France is expected to produce 33.8 million hectoliters, down 2% and about 15% below its five-year average. France is also moving ahead with a broad vine-pull program as producers adjust to changing market conditions.

Legacoop Agroalimentare said its representatives, including President Cristian Maretti and wine sector head Valentina Sourin, took part in the Brussels meeting, where discussions with European institutions also covered the future of the Common Agricultural Policy, sector budgets, co-financing rules, eligible beneficiaries and the development of naturally low-alcohol wines.

The groups said the production estimates could still change as national statistical authorities publish official data. Even so, the current picture points to a wine sector that is producing less, facing more volatile harvests and earning less from key export

markets. Traditional destinations are weakening, while gains in newer outlets have not yet been enough to offset losses elsewhere.

At the Brussels meeting, Luca Rigotti, president of Copa-Cogeca’s wine working group, said the sector needs more investment in innovation, sustainability and quality, along with a broader product offering, new export markets and stronger efforts to reconnect younger consumers with wine. The policy debate in Brussels, the organizations said, will focus in part on whether producers have adequate market-management tools and support to adapt to changing climate and trade conditions.