vinetur

European wine output will fall 4% in 2026, Copa-Cogeca estimates

The forecast of 133.6 million hectoliters would put production 8% below the five-year average, with global consumption at its lowest in 30 years

Monday, November 16, 2026



European wine production is expected to fall again in 2026 as growers face another year of heat, drought and weak demand, according to new estimates presented by Copa-Cogeca on Monday, November 16.

The farm lobby group, which represents agricultural organizations and cooperatives across the European Union, said wine and must production for the 2026/27 marketing year is projected at 133.6 million hectoliters. That would be 4% below the 2025 harvest and 8% below the average of the past five marketing years.

The figures point to what Copa-Cogeca described as a continued gradual decline in European wine output, driven by greater climate volatility and deep changes in the market. At the same time, producers are confronting lower consumption, falling trade volumes and pressure on prices, especially in red and rosé wines.

Italy, Spain and France are expected to remain the bloc's dominant producers, accounting together for 82% of EU wine and must output. Their respective shares are estimated at 30% for Italy, 27% for Spain and 25% for France.

Italy is expected to remain the world's largest wine producer, with output forecast at 41.1 million hectoliters. That would be down 7.6% from the previous harvest and 10% below the five-year average. Copa-Cogeca said southern Italian regions were hit hardest by drought and heat waves, with sharper declines than in central and northern areas. Sicily and Abruzzo were among the regions reporting the steepest drops.

France's production is estimated at 33.8 million hectoliters, down 2% from the previous harvest and 15% below the average of the past five campaigns. Copa-Cogeca said persistent drought, heat stress and a smaller vineyard area continue to weigh on output. It also pointed to large regional differences, with some wine areas suffering heavy losses while others benefited from late-summer rain and posted satisfactory yields. France is also continuing a large vineyard removal program, with 20,000 hectares scheduled to be uprooted in 2026 after 40,000 hectares had already been removed since 2024.

Spain is one of the few major producers expected to post an increase. Its 2026 production is projected at 34.5 million hectoliters, up 3% from the 2025/26 campaign. Copa-Cogeca said high temperatures caused water stress and reduced berry weight, but grape quality is still expected to be high. Even so, falling domestic demand and weak exports are weighing on the market. Apparent wine consumption in Spain fell 8% on an annual basis, the group said, and lower prices, particularly for red wines, are hurting profitability for many vineyards.

Among other producers, Germany's harvest is estimated at about 7 million hectoliters, down 3.3% from 2025. Copa-Cogeca said German wine consumption in the third quarter of 2026 fell 10% in both volume and value. Portugal's production is estimated

at about 6.6 million hectoliters, up 12%, while Romania is expected to record one of the strongest gains, with 4.5 million hectoliters, up 32% from the 2025 harvest.

Beyond production, Copa-Cogeca said demand trends are becoming a central problem for the industry. Global wine consumption is estimated at 221 million hectoliters, the lowest level in more than 30 years. The group said wine consumption rose for much of the period from 1996 to 2007, then remained relatively stable until 2017 before entering a prolonged decline that accelerated after 2022 both inside the EU and in major non-EU markets.

In 2000, the EU accounted for nearly 60% of global wine consumption, according to Copa-Cogeca. That share is now about 48%. The group said the drop in demand is having direct effects across the supply chain, reducing volumes sold and pushing down prices. Basic wines have been among the hardest hit. While opportunities continue to emerge in newer markets, Copa-Cogeca said growth there has not been enough to offset weaker demand in countries that have traditionally consumed the most wine.

Trade data presented by the group showed the same pressure. In the 12 months from September 2025 through August 2026, EU wine exports to non-EU countries reached 15.4 billion euros, down 6.8% in value. Export volumes fell 3.3% to 27.5 million hectoliters.

Most wine categories declined. Exports of wines with protected designation of origin fell 7.6%, varietal wines dropped 6.7% and wines with protected geographical indication fell 4.9%. Wines without geographical indication were broadly stable. Bulk wine and bag-in-box were the only segments to grow, rising 5% and 3.4%, respectively. Exports of bottled wines fell 7.5%, while sparkling wine exports declined 6.2%.

Among leading destinations, shipments to the United States fell 15.3%. Exports to Canada declined 11%, those to Switzerland fell 9.2%, and exports to the United Kingdom were down 3.9%. Russia and Hong Kong were among the few markets to post growth, rising 17.5% and 10.9%, respectively. Intra-EU trade also weakened, with value down 9.8% and volume down 13.4%, even as average unit values continued to rise.

Luca Rigotti, president of Copa-Cogeca’s wine working party, said the figures reflect a sector under pressure from several directions at once. He said European wine producers are dealing with increasingly unpredictable weather, higher production costs linked to conflicts and geopolitical tensions, a structural fall in wine consumption and new trade and market access barriers.

Rigotti said the industry has shown resilience and an ability to adapt, but he argued that producers will need effective market management tools and enough support to adjust to changing climate and commercial conditions. He also said the sector must continue investing in innovation, sustainability and quality, while broadening its offer, looking for new markets and rebuilding ties with consumers, especially younger generations.

Representatives at the meeting also discussed the future of the EU’s Common Agricultural Policy and sector-specific support measures. According to participants from Italy’s Legacoop Agroalimentare, the talks covered the size of the wine budget, co-financing rules, eligibility for support measures and the development of naturally low-alcohol wines.