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Global wine production is set to stay near historic lows for a fourth straight year

The OIV estimated 2026 output at 220 million to 230 million hectoliters, citing extreme weather, water stress and weaker demand

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The International Organisation of Vine and Wine said on Wednesday, November 18, that global wine production in 2026 is expected to stay near the low levels seen in recent years, held down by extreme weather, water stress and a continued adjustment in vineyard area to weaker demand.

In its first estimates for the 2026 vintage, the OIV put world wine production between 220 million and 230 million hectoliters, with a midpoint estimate of 225 million hectoliters. That would be roughly in line with 2025, when production was estimated at 227 million hectoliters, and about 7% below the five-year average. If confirmed, it would mark a fourth straight year of below-average global output.

The OIV said the result reflects a mix of climate shocks and market pressures. Heatwaves, drought and frost reduced yields in many major producing regions, while production and harvesting decisions were also shaped by slower global wine consumption and changing consumer preferences. The organization said global vineyard area has fallen by about 4.8% since 2020 as producers adapt to those shifts.

Europe remained the center of world wine production, but the region again turned in a weak overall harvest. European Union output was estimated at about 137 million hectoliters, up 1% from 2025 but still 6% below the five-year average. According to the OIV, the 2024, 2025 and 2026 vintages would rank as the three smallest of the 21st century for the bloc if the estimate holds.

The OIV said Western Europe had its warmest summer on record in 2026. Prolonged heat and low water availability restricted berry development and pushed many growers into earlier harvests. Spring frost also damaged some vineyards.

Italy is expected to remain the world’s largest wine producer, with output of 41.0 million hectoliters, down 8% from 2025 and 10% below its five-year average. The OIV said the country’s harvest was the second smallest since 2000, with summer heat and dry weather speeding ripening and limiting yields.

France, the world’s second-largest producer, is expected to reach 36.5 million hectoliters. That would be 2% above 2025 but still 10% below the five-year average, extending a run of relatively weak harvests. The OIV said exceptional summer heat,

drought and some spring frost weighed on production, although late-season rainfall supported partial recovery in some areas.

Spain, the third-largest producer, posted one of the clearer rebounds among major European countries. The OIV estimated Spanish production at 32.6 million hectoliters, up 13% from 2025 and 2% above the five-year average. Even so, the organization said output remains below longer-term historical levels after several drought-affected vintages.

Among other European producers, Germany was estimated at 8.0 million hectoliters, up 6% from 2025 but 3% below its five-year average, while Portugal was seen at 6.7 million hectoliters, up 12% from 2025 and 4% below average. Romania was one of the strongest gainers, with production estimated at 4.6 million hectoliters, up 40% from 2025 and 19% above its five-year average after rainfall helped restore soil moisture in key areas.

Several countries in Central and Southeastern Europe faced sharper declines. Hungary’s production was estimated at 1.8 million hectoliters, down 31% from 2025, while Austria was also seen at 1.8 million hectoliters, down 30%. Croatia, Czechia and Slovakia were also expected to produce smaller harvests after heat and water shortages.

Outside the European Union, the United States was expected to remain the fourth-largest wine producer in the world, but with another weak crop. The OIV estimated U.S. production at 19.0 million hectoliters, down 5% from 2025 and 18% below the five-year average. In California, the main wine-producing state, warm early spring conditions advanced vine growth before rain and strong winds disrupted flowering and fruit set. The OIV also said changes in grape purchasing and harvesting decisions contributed to the smaller crop.

Russia was estimated at 5.4 million hectoliters, down 6% from 2025 but still 10% above its five-year average. Georgia was seen at 2.5 million hectoliters, close to its strong 2025 result and 17% above average. Moldova was estimated at 1.9 million hectoliters, up 9% from 2025 and 29% above its five-year average, which would make it one of the country’s strongest vintages in two decades. Switzerland was expected to produce

about 0.8 million hectoliters, broadly unchanged from 2025. The OIV said 2026 wine-grape harvest data for China were not yet available.

In the Southern Hemisphere, which had already completed its harvest earlier in the year, production was estimated at 47 million hectoliters. That would represent 21% of global output, down 3% from 2025 and 7% below the five-year average.

South Africa emerged as the Southern Hemisphere's largest producer, with an estimated 11.3 million hectoliters, up 10% from 2025 and 14% above its five-year average. The OIV said favorable early-season conditions and rainfall in February helped ease water stress in several regions and produced the country's largest harvest in a decade. That result moved South Africa ahead of Argentina and Australia and made it the world's fifth-largest wine producer in 2026.

Argentina remained the biggest producer in South America, but its crop was smaller. The OIV estimated output at 9.7 million hectoliters, down 10% from 2025 and 11% below the five-year average, after frost and hail damaged vineyards in Mendoza, the country's main wine region.

Chile was estimated at 9.5 million hectoliters, up 13% from 2025 but still 13% below its five-year average. The OIV said heat and persistent water shortages continued to limit yields, leaving the country with a third consecutive year of relatively low production.

Australia's production was estimated at 9.1 million hectoliters, down 19% from 2025 and 23% below its five-year average. The OIV cited rainfall deficits, late-spring frost, heatwaves and localized flooding, as well as market conditions that appeared to influence harvesting decisions. New Zealand was estimated at 3.2 million hectoliters, down 15% from a large 2025 vintage and 5% below its five-year average, with producers also adjusting volumes after recent large harvests.

Brazil was one of the brighter spots in the Southern Hemisphere, with production estimated at 3.1 million hectoliters, up 10% from 2025 and 22% above its five-year average. Uruguay was estimated at 0.7 million hectoliters, up 13% from 2025 and 7% above average.

The OIV said the 2026 figures are preliminary and based on data from 29 countries representing about 95% of world wine production. For countries without complete official figures, the organization used 2025 volumes and recent trends to estimate output. It said the numbers may be revised as more data become available in 2027.