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Brunello di Montalcino sales are set to reach nearly 750 million euros in 2026

The forecast projects 9.3 million bottles sold worldwide, including an 8% U.S. decline and 15% growth in Canada

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Brunello di Montalcino is on track to close 2026 with global consumer sales worth nearly 750 million euros, even as the Tuscan wine faces a modest decline in both value and volume in a difficult year for premium wines.

The forecast comes from an analysis by the UIV Observatory prepared for the Consorzio del vino Brunello di Montalcino and presented on Thursday, November 19, at the opening of Benvenuto Brunello in Montalcino. The study estimates that about 9.3 million bottles of Brunello will be sold this year through stores, bars and restaurants worldwide. It projects a 2.7% drop in value and a 3% decline in volume from 2025.

The figures suggest that Brunello is holding up better than might have been expected in a weak global market, but they also show that even one of Italy’s best-known high-end wines is not insulated from softer demand. For the broader beverage industry, the results offer a useful measure of how consumers are responding to premium wine at a time when producers and distributors across wine, beer and spirits are watching discretionary spending closely. The split between the United States and Canada is also likely to draw attention in North America, where drinks companies are weighing where to put marketing and distribution resources.

The United States, historically Brunello’s main reference market, is expected to post an 8% decline in consumer sales value in 2026, according to the study. Canada, by contrast, is expected to grow 15%, making it the strongest major foreign market in the report. Italy, which remains the leading country by total spending on Brunello, is seen slipping 1.2% in value. Together, those three markets account for about two-thirds of global consumer sales value for the denomination.

The report also pointed to smaller gains in Denmark and Austria, both up 3%, while Switzerland is expected to edge lower. Conditions appear more difficult in two other important export markets, with Germany projected to fall 8% and the United Kingdom 7%.

Despite the softer volumes, pricing has remained broadly stable. The average consumer price for a bottle of Brunello is expected to stay just under 81 euros. Outside Italy, the average is about 85 euros, compared with 74 euros in the domestic market. The United States remains the market with the highest average price, at 88 euros a

bottle, while Switzerland and the United Kingdom are also above 80 euros.

Giacomo Bartolommei, president of the Brunello di Montalcino consortium, said the consumption data give producers a clearer view of actual market conditions than importer orders alone. In remarks released with the study, he said the strength of the Montalcino name remains important in a difficult period for wine, including the high-end segment, but added that it does not remove the need for continued promotion. He said the consortium has expanded its program for 2027 with initiatives planned in the United States, several Italian cities, Paris, Düsseldorf, Zurich and Bento Gonçalves in Brazil.

The analysis was based on multiple sources, including IWSR, NielsenIQ, SipSource-WSTA and the U.S. Census. The use of several market trackers suggests the consortium is trying to build a fuller picture of final consumption rather than relying only on export or shipment data, which can lag changes in retail and restaurant demand.

The timing of the report is important for producers because it coincides with Benvenuto Brunello, the annual showcase for new releases. The event in Montalcino runs through November 23 and features five days of tastings with 116 wineries. The wines being presented include Brunello 2022, Brunello Riserva 2021 and Rosso di Montalcino 2025, all set to enter the market from 2027. The opening days on Thursday, November 19, and Friday, November 20, are reserved for Italian and international media and selected trade professionals. In the following days, tasting counters will also open with producers and wine enthusiasts in attendance.

The preview will then move to London on November 25 for a U.K. edition aimed at the press and trade. That international push reflects the central challenge shown in the 2026 numbers: Brunello is still commanding high prices and broad global attention, but growth is becoming harder to find, especially in mature markets where premium wine buyers are becoming more selective.