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The E.U.'s 2026 wine harvest is set to rank among the century's three smallest

The OIV expects output of 137 million hectoliters, 1% above 2025, still 6% below the five-year average after record heat

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The International Organisation of Vine and Wine said on Wednesday, November 18, in Dijon, France, that world wine production in 2026 is expected to remain close to the previous year’s level but stay below the five-year average, as climate pressures and market conditions continue to weigh on the sector.

In its first estimates for the 2026 harvest, the OIV said the European Union is likely to produce about 137 million hectoliters of wine, up 1% from 2025 but about 6% below the five-year average. If confirmed, that would make 2024, 2025 and 2026 the three

smallest EU vintages of the 21st century. Even so, the bloc would still account for about 61% of global wine output in 2026.

The group said Western Europe went through its warmest summer on record in 2026. Prolonged heat and water stress reduced berry development and pushed harvests forward in many wine regions. Spring frost caused additional losses in some areas, while adequate water reserves and timely rainfall supported output in others. The result, the OIV said, was an uneven season across the continent, with weak harvests in France and Italy and declines in several Central European countries offsetting recoveries in Spain, Portugal and Romania.

Italy is expected to remain the world's largest wine producer in 2026, with output estimated at 41.0 million hectoliters. That is down 8% from 2025 and 10% below the five-year average. The OIV said it would be Italy's second-smallest harvest since 2000, standing only 7% above the low recorded in 2023. Summer heat and long dry periods accelerated ripening and brought an unusually early harvest, while also limiting yields.

France, the world's second-largest producer, is expected to reach 36.5 million hectoliters. That would be 2% higher than in 2025 but still 10% below the five-year average, marking a third straight year of relatively low production. The OIV said heat and drought sharply reduced yields across much of the country, with frost adding damage in some regions. Rain later in the season helped support partial recoveries, but not enough to reverse losses caused by water shortages during the growing season.

Spain is projected to remain the world's third-largest producer, with output of 32.6 million hectoliters. That would be 13% higher than in 2025 and 2% above the five-year average. The increase follows three small vintages affected by drought, although the OIV said production still remains below historical levels. Repeated heatwaves also contributed to one of the earliest harvests recorded in the country.

Among other large EU producers, Germany's wine production is estimated at 8.0 million hectoliters, up 6% from 2025 but 3% below the five-year average. The OIV said a hot and dry growing season accelerated ripening and limited berry development, leading to an exceptionally early harvest.

Portugal is expected to produce 6.7 million hectoliters, a 12% increase from 2025, though still 4% below its five-year average. According to the OIV, winter rainfall replenished soil moisture and helped vine development, but later heat and water stress restricted yields in several producing areas.

Greece is projected at 1.7 million hectoliters, up 1% from 2025. The OIV said that continues the recovery from the small harvests of 2023 and 2024. Even so, output is still 7% below the five-year average after spring frost and localized hail reduced yields.

The picture in Central and Southeastern Europe was mixed. Romania posted one of the strongest rebounds in the region, with production estimated at 4.6 million hectoliters, up 40% from 2025 and 19% above the five-year average. The OIV said late-spring and early-summer rainfall helped rebuild water reserves in key growing areas and supported the recovery.

Production is also expected to rise in Bulgaria and Slovenia. Bulgaria’s output is estimated at 0.7 million hectoliters, up 17%, while Slovenia is projected at 0.5 million hectoliters, up 5%.

Other countries in the region are facing much smaller harvests. Hungary’s production is estimated at 1.8 million hectoliters, down 31% from 2025, after spring frost was followed by an exceptionally hot and dry summer. Austria is also expected to produce 1.8 million hectoliters, down 30%. The OIV said severe drought and heat reduced berry growth and juice yields, especially in the eastern wine-growing regions.

Smaller harvests are also expected in Croatia, where production is estimated at 0.6 million hectoliters, down 29%; in Czechia, at 0.5 million hectoliters, down 24%; and in Slovakia, at 0.2 million hectoliters, down 33%. The OIV said heat and water shortages affected producing areas across those countries and pushed output below average levels.

The estimates underline how strongly weather patterns continue to shape wine production across Europe, even in countries where output has recovered from the lows of recent years. The OIV said the combination of extreme summer heat, prolonged drought, local frost events and uneven rainfall left many producers with early harvests and reduced yields, keeping overall output below normal despite gains in several

markets.