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Brunello di Montalcino Sales Are Expected to Reach Nearly €750 Million in 2026

The consortium’s forecast shows consumer spending slipping 2.7% and bottles sold falling 3%, led by an 8% drop in the United States

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Brunello di Montalcino is expected to end 2026 with nearly €750 million in consumer sales worldwide, with demand slipping modestly in a difficult year for wine, according to an analysis released by the Consorzio del vino Brunello di Montalcino on Thursday, November 19.

The forecast points to about 9.3 million bottles sold globally in shops, bars and restaurants over the full year. Compared with 2025, that would mean a 2.7% decline in value and a 3% drop in volume, based on research prepared for the consortium by the Unione Italiana Vini observatory, known as Osservatorio UIV.

The estimate refers to spending by final consumers on the Brunello di Montalcino denomination, not to winery revenue and not to exports alone. That distinction matters because the study is meant to measure end demand for one of Italy’s best-known high-priced wine appellations, rather than shipments to importers or sales booked by producers.

Brunello di Montalcino is a Tuscan red wine made from sangiovese grapes in the municipality of Montalcino. The denomination has long depended on a small number of major markets, and the 2026 outlook shows those markets moving in different directions.

The United States, historically Brunello’s main foreign market, is expected to post an 8% decline in consumer sales value this year. Canada, by contrast, is projected to grow 15%. Italy, which remains the leading country by consumer spending on Brunello, is seen edging down 1.2% by value. According to the consortium, those three markets account for about two-thirds of the denomination’s global consumer sales value.

Elsewhere, the picture is mixed. Denmark and Austria are both expected to rise 3%. Switzerland is projected to record a slight decline. Germany and the United Kingdom, two other important markets for premium Italian wine, are expected to post steeper drops of 8% and 7%, respectively.

Despite weaker volumes, the average consumer price per bottle is seen holding broadly steady at just under €81. The average price is higher outside Italy, at about €85 a bottle, compared with €74 in the domestic market. The United States remains the

highest-priced market at an average of €88 per bottle, while Switzerland and the United Kingdom also stand above €80.

The consortium presented the figures at the opening of Benvenuto Brunello in Montalcino, an annual event for trade, media and wine enthusiasts that runs through November 23. The event showcases Brunello 2022, Brunello Riserva 2021 and Rosso di Montalcino 2025, ahead of their broader commercial debut. A London edition for media and trade is scheduled for November 25.

In a statement released with the data, consortium president Giacomo Bartolommei said consumption figures offer a better view of real market conditions than importer orders alone. He said the downturn has affected premium wines as well, and that the denomination’s brand strength helps but does not remove the need for continued promotion.

The analysis was based on several data sources, including IWSR, NielsenIQ, SipSource-WSTA and the U.S. Census, according to the consortium. Because the 2026 figures are forecasts rather than final year-end results, they should be read as an estimate of where the market is heading rather than a completed annual balance. Still, the report suggests that Brunello has so far avoided a sharper setback than some other high-end wines, even as demand weakens in the United States and other mature markets.