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Occitanie bulk wine prices rose 2% in the 2025-2026 campaign

Traded volumes increased 1%, but exports fell and production costs remained 27% above 2020 levels

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Occitanie’s bulk wine market was broadly steady in the 2025-2026 campaign, with average prices rising 2% and traded volumes edging up 1%, even as exports from the French region weakened and growers continued to face higher production costs.

In a report published Friday, November 20, DRAAF Occitanie and Agreste said bulk wines produced in the region sold for an average of 92 euros per hectoliter during the campaign that ran from August 1, 2025, to July 31, 2026. Total volumes of wines sold in bulk under the protected geographical indication system, known as IGP, and without geographical indication, known as SIG, reached 7.16 million hectoliters.

The gains from the previous campaign were modest. The report said volumes remained 4% below the average of the five campaigns from 2020 to 2024, and prices were still 2% below that benchmark. At the same time, production costs have risen 27% since 2020, leaving many producers with tighter margins despite the recent improvement in prices.

That matters beyond the region’s vineyards because Occitanie is one of Europe’s largest sources of bulk wine, and shifts in its prices, available volumes and export demand can affect purchasing conditions, margins and supply decisions for wineries, bottlers and other beverage companies that rely on the region for large-volume sourcing.

Bulk sales play a central role in the regional wine economy. Between 2020 and 2025, wines sold in bulk under SIG and IGP labels accounted for more than 55% of Occitanie’s total wine production on average, according to the report.

The 2025-2026 campaign showed a split between categories. SIG wines led the market higher, with volumes up 5% to 1.851 million hectoliters and average prices up 1% to 81 euros per hectoliter. IGP volumes were flat at 5.308 million hectoliters, while prices rose 3% to 96 euros per hectoliter. Organic bulk wines moved in the opposite direction, with traded volume down 8% to 248,000 hectoliters. Their average price rose 1% to 139 euros per hectoliter, but that was still 10% below the five-year average.

White wines were the strongest part of the market. The report said both volumes and prices rose more for white wines than for red or rosé. The share of white wines in Occitanie’s bulk trade climbed to 32% in 2025 from 27% in 2021, while red wines lost 6 points of share over the same period. Among IGP wines, white bulk wine averaged 113 euros per hectoliter, up 4% from the prior campaign. SIG white wine prices rose 2% to 94 euros per hectoliter. Rosé prices were weaker, falling 2% for SIG rosé and staying

flat for IGP rosé.

The report said price momentum became stronger toward the end of the campaign as inventories tightened after a small 2025 harvest and distillation measures that covered 228,000 hectoliters. By July, monthly prices were above July 2025 levels by 11% for SIG wines, 13% for IGP wines and 7% for organic wines. Even so, DRAAF Occitanie and Agreste said bulk wine prices in June were only roughly comparable to 2020 levels, highlighting the gap between selling prices and input costs.

The broader backdrop remained difficult. Global wine production recovered only slightly in 2025 to 227 million hectoliters, up 0.9% from 2024, after what the report described as a historically weak 2024 harvest. Italy remained the world's largest producer at 44 million hectoliters, ahead of France. French wine production fell 2% in 2025 to 35 million hectoliters.

In Occitanie, the 2025 harvest reached 10.6 million hectoliters, down 7.2% from 2024 and 22.5% below the 10-year average. The report linked much of that decline to reduced vineyard area, including 16,000 hectares that received public support in 2025 under a vine-pull scheme. National wine stocks in August 2025 were also down 5% from August 2024, according to customs data cited in the report.

Demand trends in the wine market added to the pressure. DRAAF Occitanie and Agreste said global wine consumption fell 2.7% between 2024 and 2025 to 208 million hectoliters, the lowest level in 30 years. The report pointed to maturing demand in the United States, a steep decline in Chinese consumption since 2018, a long-running fall in European consumption and geopolitical disruptions to trade in 2025. In France, wine consumption has dropped 37% since 1995, the report said.

Exports from Occitanie reflected that weaker demand. Shipments of IGP and AOP wines from the region fell 5.6% by volume in the 2025-2026 campaign from the previous year and were down 8% by value. The average export price slipped 2.7%. The decline was most severe in the Americas, where exported volumes fell 10% and average prices dropped 11%. Prices to other destinations rose slightly, but not enough to offset lower volumes. The report said exports were also affected by protectionist measures.

There was one major positive sign for supply. As of October 1, the 2026 harvest in Occitanie was estimated at 13 million hectoliters, up 23% from 2025 and 5% above the five-year average. DRAAF Occitanie and Agreste said the increase came despite a 16% drop in productive vineyard area since 2020 and despite a very hot summer. Production in Languedoc-Roussillon was estimated at 11.1 million hectoliters, up 25%, while the part of the Southwest basin located in Occitanie was put at 1.9 million hectoliters, up 12%.

The agencies said that rebound was specific to Occitanie, where vineyards showed stronger resilience than much of the rest of France. The national 2026 harvest was expected to rise only 4% from the historic low recorded in 2025.