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Global bulk wine exports fell 11.5% over the past year

A new industry report says producers are chasing African demand, pricier varietals, private labels, low-alcohol beverages

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Global trade in bulk wine has fallen sharply over the past year, pushing producers, exporters and distributors to look for new markets, shift toward higher-value products and expand into newer beverage categories, according to a dossier released Tuesday, Nov. 24, by the World Bulk Wine Exhibition.

The report, published ahead of the exhibition's Nov. 30 and Dec. 1 meeting at RAI Amsterdam in the Netherlands, said global bulk wine exports fell 11.5% by volume and 11.4% by value between July 2025 and July 2026. The average export price was largely unchanged at 0.78 euros a liter, suggesting that the drop in revenue came mainly from lower traded volumes rather than a broad fall in prices.

The slowdown was especially severe in the opening months of 2026. Caterina Tucci, director of the World Bulk Wine Exhibition, said global bulk wine exports dropped by about 19% in both volume and value in the first quarter. The weaker trade flow, together with changing drinking habits, is forcing companies to rethink where they sell, what they offer and how they source supply.

The downturn has not hit all producers in the same way. Spain, the world's largest bulk wine exporter, sold 10.2 million hectoliters abroad during the period, equal to 1.02 billion liters. Its export volume fell 5.2%, but revenue rose 0.9%, indicating an improvement of about 6.4% in the average price of its international sales. That performance stands apart from the broader global decline in turnover.

South Africa is another exception highlighted in the report. Rafael del Rey, an analyst at Del Rey Analysts of Wine Markets, said South Africa was the only country among the world's 10 largest bulk wine exporters to post growth during the period under review, although the material released by the exhibition did not specify the size of that increase or whether it referred to volume, value or both.

The search for growth is increasingly centered on Africa. The dossier identified Ivory Coast, Ghana and Morocco as markets where bulk wine imports are rising. Ivory Coast moved from fourth to third place among destinations for Spanish bulk wine exports between 2025 and 2026, a shift the report said reflects broader changes in the geography of the trade.

The organization also pointed to opportunities beyond traditional markets in West Africa, Asia and Central Europe, with particular attention on China, Japan, Austria, Germany and Hungary. The underlying goal for many suppliers is to reduce dependence on a small number of buyers and spread risk more widely across regions.

Another major change is taking place in the product mix. According to Del Rey, European bulk wines sold with grape variety and vintage identified are the only large category to have expanded consistently since 2017. Their international sales rose 16.4% by volume and 19.3% by value over that period. Because revenue increased faster than volume, the data also suggest these wines gained ground in average pricing.

That trend is changing how bulk wine is positioned in the market. Instead of being seen only as a low-cost, high-volume commodity, some suppliers are using bulk formats to serve buyers that want specific grape varieties, more consistent quality and styles tailored to local consumer tastes. The dossier pointed to grapes such as Chardonnay, Verdejo, Malbec and Cabernet Sauvignon as examples of varieties that help sellers meet more targeted demand and reach higher price brackets.

Private-label development is also reshaping the business. Retailers and beverage companies can buy wine in bulk, choose the blend, design packaging and sell it under their own brand. In that model, the final value depends not only on the wine’s origin price, but also on quality, packaging, market positioning and branding.

The report said white wines, varietal wines, sparkling wines and alternative packaging such as bag-in-box are among the segments drawing more attention. It also highlighted dealcoholized and low-alcohol wines, wine-based beverages and ready-to-drink cocktails as areas where bulk wine producers may find new demand. Advances in dealcoholization technology, especially systems that recover aromas, are improving product quality and widening the commercial use of bulk wine as a base ingredient for other drinks.

Logistics remain a major pressure point for the industry. The dossier cited volatile ocean freight rates, geopolitical tensions, tariff uncertainty, climate-related disruptions and supply chain interruptions as factors affecting margins and planning. These pressures are leading companies to reconsider trade routes, storage capacity and where bottling should take place.

Shipping wine in bulk to bottling plants near the destination market can cut the movement of packaging materials and improve efficiency in some cases. The industry is also looking more closely at multimodal transport that combines rail and inland waterways to reduce reliance on trucking, although the economic and environmental gains depend on local infrastructure and shipping distances.

Those issues will be central at the World Bulk Wine Exhibition, which has been organized by Vinexposium since 2024. In 2025, the event drew about 240 exhibitors from 25 producer countries and 2,150 trade visitors from 60 markets, along with 17 diplomatic delegations. More than 1,000 wines and spirits were tasted, and organizers said around 1,000 business meetings were held. About 30% of exhibitors came from outside Europe.

France, Italy, Spain, Argentina and South Africa are among the countries with the largest presence. The report said France increased its number of exhibitors by 45% over three years, while participation from the United States rose 25% over the same period. For the 2026 edition, South Africa’s number of exhibiting companies is up 38% from a year earlier, and Argentina’s is up 12%.

Spain is set to attend with 25 registered exhibitors, making it the third-largest national presence behind France and Italy at the time the dossier was published. Argentina will have 19 exhibitors after hosting Vinexpo Explorer – The Bulk Chapter in Mendoza in June, an event that brought together 50 Argentine wineries and 25 international buyers for meetings, visits, seminars and tastings.

The fair is also broadening its geographic reach. The Netherlands has joined the exhibitor offering, while Mauritius, Panama and Lebanon took part for the first time in 2025. Alongside major European producers, companies from the Americas, Oceania and Africa are expected to present red, white, rosé and sparkling wines, as well as organic wines, varietal wines, wines with denomination-of-origin status, spirits and low- or no-alcohol products.

Quality will have a separate platform through the International Bulk Wine Competition, which focuses on wines and spirits sold in bulk. In 2025, 39 wines from 10 countries received awards, including four Grand Gold medals. Since the competition began,

winning wines have come from more than 63 grape varieties, and since 2019 its judging panels have included professionals from more than 40 countries.

The 2026 competition results are scheduled to be released on Nov. 29, a day before the exhibition opens. Organizers said visitors will be able to take part in a self-service interactive tasting of the Gold and Grand Gold medal winners, rate the wines they prefer and receive a personalized selection based on those choices. The jury will be led by Spanish wine journalist José Luis Murcia and will include buyers, winemakers and specialists from several international markets.

The WBWE Academy conference program will feature 10 sessions on trade trends, profitability, technology and new product categories. Tucci and Del Rey are due to open the program on Nov. 30 with a presentation on the state of the global bulk wine market. The Wine & Spirits Shippers Association is also scheduled to discuss changes in international transport and the supply challenges affecting wine and spirits.

Irem Eren is set to speak on commercial opportunities in no- and low-alcohol wines, along with value creation through branding and packaging. Other sessions will focus on Italian sparkling and semi-sparkling wines made with the Charmat, or Martinotti, method, as well as production efficiency and how businesses are adapting to economic uncertainty.

The exhibition will be held in Hall 5 at RAI Amsterdam. It is scheduled to run from 9:30 a.m. to 6:30 p.m. on Nov. 30 and from 9:30 a.m. to 5 p.m. on Dec. 1. Organizers said professionals will have access to a meeting platform and to a separate Silent Tasting Room where buyers can compare wines and spirits from different suppliers before starting purchase negotiations.