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Italian supermarket wine sales fell 1.5% in the first nine months of 2026

Federvini said premium traditional-method sparkling wines rose 9.6% by value, but U.S. imports from Italy dropped 18.4%

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Italian wine sales weakened in supermarkets and other modern retail channels in the first nine months of 2026, while higher-end sparkling wines held up better and exports showed a mixed picture, according to an industry report released Thursday, November

26, by Federvini.

The Italian trade group, citing research by Nomisma and TradeLab, said the country's wine, spirits and vinegar sectors were operating in a climate of international uncertainty marked by higher energy costs linked to tensions in the Middle East, transatlantic tariffs and pressure on household purchasing power.

In Italy's domestic market, the three sectors generated 3 billion euros in the first nine months of the year, Federvini said. Within that total, wine sales in large-scale retail reached 2.1 billion euros, down 1.5% by value and nearly 3% by volume from a year earlier.

Nomisma's analysis found that still and semi-sparkling wines declined, while sparkling wines rose. The strongest performance came from Italian traditional-method sparkling wines, which increased 9.6% by value and 14% by volume, a sign that some consumers were shifting toward more premium products even as overall purchases softened.

The export picture for wine was more uneven. Federvini said wine exports were broadly stable by volume, up 0.3%, but slipped 1.6% by value in the period. Brazil increased purchases of Italian wine by 6.0%, while France rose 0.9%. The sharpest weakness came from the United States, where imports from Italy fell 18.4%, a decline the group linked to tariffs and inflation.

Other major markets also weakened. Total wine demand in the United Kingdom fell 3.7% by value, while purchases from Italy dropped 5.3%, according to the report. Germany posted a 6.1% decline in total wine imports and a 4.2% decline in imports from Italy.

Sparkling wine offered one of the few brighter spots abroad. Italian sparkling wine sales increased 2.6% in Germany, 69.1% in China and 9.2% in France, Federvini said. Overall, the group said Italy's export performance sat between relatively stable results for France, at +0.7%, and steeper declines for most other major exporters, ranging from -4.4% for New Zealand to -15.3% for the United States.

The report also pointed to weakness in restaurants, bars and other out-of-home venues, though the decline was less severe than a year earlier. TradeLab's analysis said total out-of-home consumption in Italy was broadly stable in value at 61.4 billion euros in the first nine months of 2026. But consumer behavior became more selective in the third quarter, with spending shifting toward midrange and higher-end restaurants.

Wine and spirits together accounted for more than 1 billion servings in out-of-home channels, with total consumption down 2%, compared with a 6% drop in 2025, the report said. Wine consumption outside the home fell 2.7%, improving from a 7% decline a year earlier. Sparkling wine consumption in those venues dropped 3.1%. Dinner gained importance as a drinking occasion, accounting for 50% of wine consumption in the third quarter.

Federvini President Giacomo Ponti said in the statement that consumers were becoming more selective and companies were increasingly focusing on quality. He also warned that the U.S. market remained critical for Italian producers and said the latest developments on U.S. trade policy were a cause for concern.

Ponti said a possible 15% tariff tied to an investigation into overcapacity was worrying for companies, distributors and consumers. He said the United States remained an irreplaceable market, while adding that businesses should also look to other destinations and opportunities linked to Mercosur and trade agreements with India and Australia.

The findings extend beyond wine. In spirits, large-scale retail sales reached 906 million euros in the period, flat by value and up 0.9% by volume, Federvini said. Alcoholic aperitifs rose 4.1% by value. Some categories posted much stronger gains, including tequila at 18.3%, flavored vodka at 17.8% and gin at 12.4%, while grappa fell 8.1%.

Italian spirits exports rose 5.2% by value in the first eight months of the year, second in Europe only to Germany's 7%, according to the report. Sales increased sharply in India, up 62.4%, and in France, up 31.7%, but declined in the United Kingdom, down 8.5%, in the United States, down 31.2%, and in China, down 40.6%. TradeLab also found that alcoholic cocktails returned to growth in out-of-home channels, up 1.4% in the first nine months and 2.1% in the third quarter.

Vinegar performed somewhat better in the domestic market. Sales in large-scale retail reached 113 million euros in the first nine months, up 1.2% by value on stable volumes. Apple cider vinegar led the category, rising 9.2% by value and 10.7% by volume. Balsamic Vinegar of Modena PGI was broadly stable, up 0.8% by value, while wine vinegar fell 2.2%.

Abroad, Italian vinegar exports grew faster than overall imports in several Asian markets that the report described as strategically important. In China, Italian vinegar exports rose 42.5%, compared with 13% growth in total imports. In South Korea, Italian exports increased 22.2%, versus 11% growth in total imports. Exports also rose to Japan, up 15.8%, Australia, up 8.7%, and the United Kingdom, up 7.4%. They fell to the United States, down 15.4%, Canada, down 12.7%, and France, down 9.9%. Federvini said Italy remained the world’s leading vinegar exporter with a 40% share.

For beverage producers, importers and distributors, the Italian data may serve as an early signal on assortment, pricing and channel strategy in one of Europe’s largest drinks markets. The report suggests demand is not collapsing, but consumers are becoming more selective, rewarding some premium segments while cutting back in mainstream wine purchases and remaining cautious in restaurants and bars.