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Occitanie IGP bulk wine prices rose 2.6% in the 2025/2026 campaign

IGP trading volume slipped 0.3% to 5.31 million hectoliters, leaving total bulk sales 4% below the 2020-2024 average

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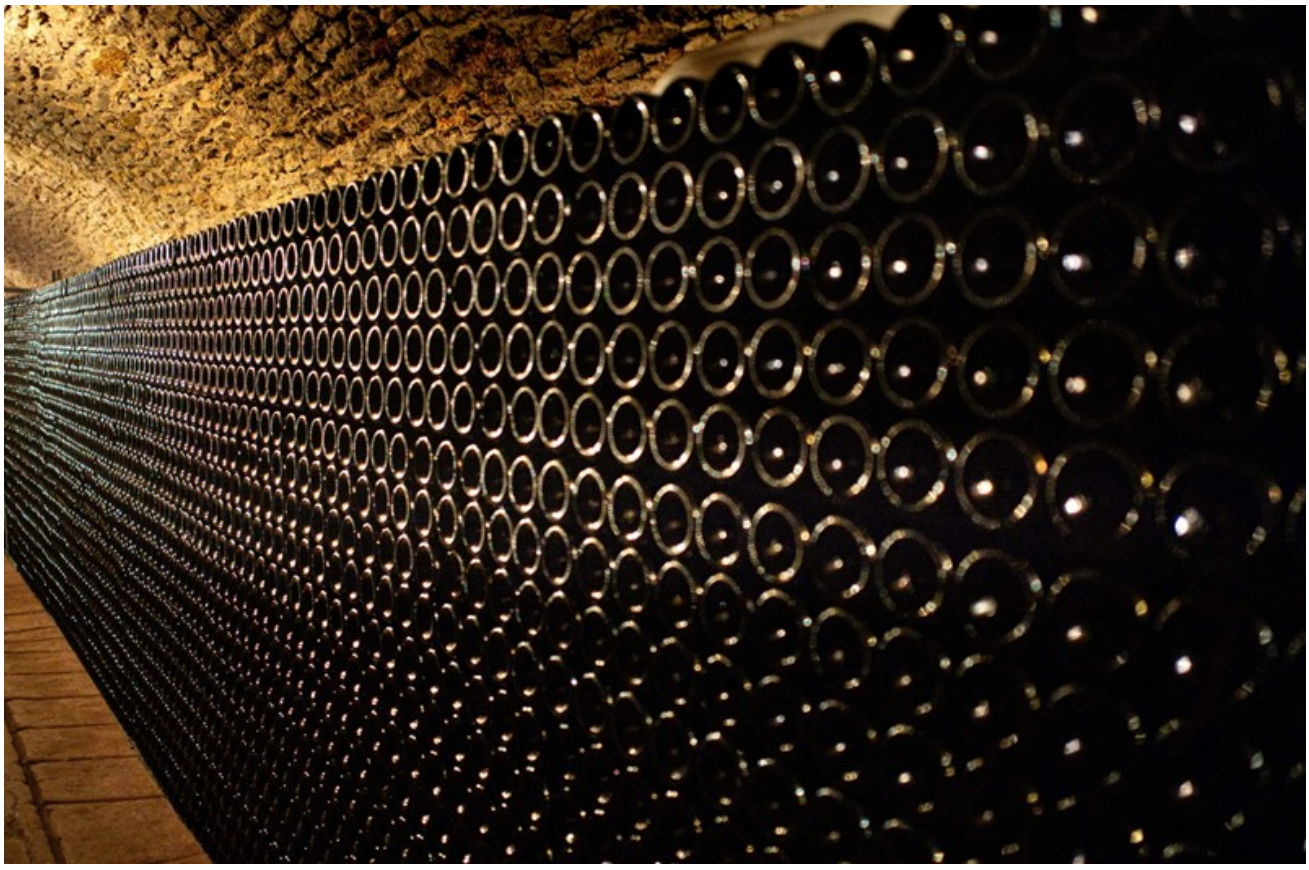

Bulk wine prices in Occitanie rose in the 2025/2026 campaign, while trading volumes in the region’s protected geographical indication wines were nearly unchanged from a year earlier, according to a technical note published Thursday, November 26, by DRAAF

Occitanie, the regional arm of France’s agriculture administration.

The note said the average price for IGP wines, the French category for wines with a protected geographical indication, reached €95.60 per hectoliter, up 2.6% from the 2024/2025 campaign. Transaction volume in that segment slipped 0.3% to 5.31 million hectoliters. Wines sold without a geographical indication, or SIG, posted stronger volume growth. Their bulk transactions rose 5% to 1.85 million hectoliters, while the average price increased 1% to €80.60 per hectoliter.

Taken together, bulk transactions in the IGP and SIG segments increased 1% from the previous campaign, the report said. Even so, combined volumes were still 4% below the 2020-2024 average. Prices for the two segments combined improved by about 2% from the prior campaign, but remained 2% below the average seen across 2020-2024.

DRAAF Occitanie said the region’s wine industry has been going through a deep crisis for several years. French authorities backed large-scale support measures, including two vine-pull programs covering more than 32,000 hectares with €128 million committed, and a distillation aid campaign involving 228,000 hectoliters and €7.5 million. Those steps, along with smaller harvests of 11.7 million hectoliters in 2024 and 10.6 million hectoliters in 2025, helped reduce pressure in the market, the note said. It also said commercial conditions remain fragile because international trade has slowed and overall wine consumption has fallen.

Within the IGP market, red wine volumes fell 0.8% to 1.94 million hectoliters, rosé declined 1.4% to 1.78 million hectoliters, and white increased 1.4% to 1.59 million hectoliters. Prices rose across all three color categories. Red IGP averaged €92.40 per hectoliter, up 2.3%. Rosé reached €83.70, up 0.4%. White climbed to €112.80, up 4.3%, making it the strongest price increase among the main IGP categories.

The SIG market showed a different pattern. Red volumes increased 3% to 674,700 hectoliters, rosé jumped 10% to 471,600 hectoliters, and white rose 3.8% to 704,900 hectoliters. Average SIG prices were mixed by color. Red increased 1% to €70.20 per hectoliter, white rose 2.4% to €94.30, and rosé was the only major segment to record a decline, slipping about 1.5% to €75.00.

Compared with the 2020-2024 average, IGP volumes remain well below earlier levels. The note said red IGP bulk transactions were down 20%, rosé was down 7%, and white was down 2%. SIG volumes moved the other way. Red SIG was 26% above the five-year average, rosé was 44% higher, and white was 6% higher. DRAAF Occitanie said the rise in SIG sales has continued steadily, with contracted volumes above those seen in the previous 10 campaigns. It also said rosé SIG transaction volumes reached their highest level of the past decade.

That shift changed the balance of the regional bulk market. IGP wines accounted for 74% of bulk volumes in 2025/2026, down from an average 80% over the 2020-2024 campaigns. SIG wines rose to 26% of the market from an average 20%.

Prices also looked different depending on the time frame used for comparison. The average IGP bulk price of €95.60 per hectoliter was roughly stable against the 2020-2024 average, down just 0.1%. The average SIG price of €80.60 was still 2% below the prior campaign average and about 6% below the 2020-2024 benchmark. The note said the longer-term price decline was visible across most color categories in both segments, with the main exceptions being red and white IGP, which were slightly above their five-year averages.

The technical note also indicated tighter availability in part of the region. Producer-held stocks in Languedoc-Roussillon were reported 22% lower than in 2025, adding to evidence that supply has been reduced after years of market pressure.

The figures are likely to be closely watched outside southern France as well. Occitanie is one of Europe’s main sources of bulk wine, and its official price and stock indicators can affect purchasing decisions by bottlers, traders and private-label buyers across the beverage market. They may also serve as a reference point for competing producers, including in Spain, where bulk wine prices are monitored against French supply conditions.

The report also highlighted weakness in organic bulk wine trade. Total organic transaction volume across all categories fell 8% from the 2024/2025 campaign to 247,614 hectoliters, and it was also 8% below the 2020-2024 average. The average organic bulk price rose 1% from a year earlier to €138.55 per hectoliter, but remained

10% below the 2020-2024 average. Organic SIG volume dropped 8% to 71,189 hectoliters, while organic IGP volume also fell 8% to 176,425 hectoliters.