vinetur

Spain prepares for smaller vineyards and higher-value wine in next five years

Spanish exports expected to exceed €3.5 billion by 2030

Friday, April 25, 2025



The Spanish wine sector is preparing for major changes that will shape its future through 2030, according to the report "Spanish Wine Market Forecasts 2025-2030: Strategic Analysis and Projections" published by Vinetur on Friday, April 25. Over the next five years, Spain will maintain its position as the country with the largest vineyard area in the world, though the total is expected to gradually decrease to about 900,000 hectares by the end of the decade. This reduction will be caused by structural consolidation and the abandonment of vineyards that are no longer profitable.

Wine production in Spain will face greater volatility due to the effects of climate change, leading to annual fluctuations. Despite these changes, the average production volume is expected to stabilize around 31 million hectoliters. Wineries are shifting their strategic focus to improving product value, aiming to raise average prices in both the domestic and international markets.

Spanish wine exports are projected to grow moderately in volume, reaching 21.2 million hectoliters by 2030. However, the value of these exports will see stronger growth, with international sales expected to surpass 3.5 billion euros per year. The increase in export value will be supported by higher average prices and a deliberate move away from bulk wine toward bottled, organic, and sparkling wines, in response to strong competition from France and Italy.

Within Spain, wine consumption is set to continue its decline in volume, with per capita household consumption forecasted to drop to 6.2 liters per year by 2030. This decline will be driven by the aging of traditional consumers and limited interest from younger generations. However, the overall value of the domestic wine market is expected to grow, fueled by price increases and a consumer shift towards mid- and high-end wines.

Consumer trends influencing the market include the rising demand for organic wines, particularly for export, and the growing popularity of low-alcohol and de-alcoholized wines among young, urban consumers. E-commerce is expected to continue gaining ground as a sales channel, while traditional retail outlets will likely lose market share.

The report also points to wine tourism as a key area of growth. A steady rise in visitors to wineries and wine routes is anticipated, helping many wine regions diversify revenue streams and strengthen brand recognition. This trend will be particularly important for

small and medium-sized wineries seeking closer relationships with consumers.

The number of wineries in Spain is predicted to decline slightly, stabilizing at around 3,780 by 2030. This consolidation is driven by the need for greater size, efficiency, and investment capacity to compete in a tougher national and global market.

Climate change will increasingly impact Spanish wine production, affecting the consistency and quality of harvests. To counter these effects, the sector will invest in precision viticulture, adopt more sustainable practices, plant heat- and drought-resistant grape varieties, and explore new growing areas at higher altitudes and latitudes.

The Spanish wine industry is expected to shift toward a model focused on lower volume but higher value, emphasizing quality, sustainability, and origin. How well the sector adapts to these challenges will define Spain's standing in a global market that is becoming increasingly divided between premium products and low-cost mass-market wines.