vinetur

Italian Wine Exports Hit €8.1 Billion in 2024 Despite 30% Drop in Domestic Consumption Since 1995

Industry leaders warn of climate, tariff, and demographic challenges as sector adapts with innovation and global market expansion

Thursday, November 13, 2025



The Italian wine industry is facing a period of uncertainty, marked by both longstanding strengths and new global challenges. Over the past decade, from 2014 to 2024, Italy’s wine sector has seen steady growth in value and a doubling of exports, reaching a record €8.1 billion in 2024. However, the market is now contending with structural issues such as climate change, shifting consumer habits due to demographic changes, and more immediate concerns like U.S. tariffs. The real impact of these tariffs is expected to become clear only in 2026 when new price lists are released.

Industry leaders gathered at Ca’ del Bosco in Franciacorta for a conference organized by the Leonardo Committee – Italy Quality Committee. The event brought together figures such as Sergio Dompè, president of the Leonardo Committee; Matteo Zoppas, president of ICE (the Italian Trade Agency); Gaetano Marzotto and Andrea Conzonato from Herita Marzotto Wine Estates; Antonella Rossetti from the European Commission’s Agriculture Cabinet; and other key representatives from Veronafiere, Coldiretti, Federvini, Unione Italiana Vini (UIV), Nomisma, and the Italian Ministry of Agriculture.

Denis Pantini of Wine Monitor-Nomisma presented research highlighting the sector’s resilience: 30,000 companies generate €16 billion in revenue, employ 74,000 people (16% of Italy’s food and beverage workforce), and maintain a positive trade balance of €7.5 billion. Vineyards remain among the most profitable crops in Italy, second only to fruit. The wine industry also supports rural areas through wine tourism.

Italy’s wine sector is characterized by significant biodiversity. The top ten grape varieties account for just 38% of total production—much less concentrated than in Australia or France. This diversity is both an asset and a challenge, as the business landscape remains fragmented: the top 100 companies account for 55% of revenue.

Exports have been crucial in offsetting declining domestic consumption, which has dropped by 30% since 1995 to 23 million hectoliters. Half of Italy’s production now goes abroad, with Prosecco alone representing nearly a quarter of exports. The average price for bottled Italian wine has risen to €4.4 per liter over the past decade but still lags behind France (€7.8) and Australia (€5.5).

In 2025, Italian wine exports held relatively steady through July (-0.9%), outperforming Spain (-1.8%), Chile (-4.3%), Australia (-8.5%), and the United States (-29.2%, affected by counter-tariffs in Canada and China). Within Italy, consumer preferences are shifting: sparkling wines and white wines have gained market share over reds as daily wine consumption declines.

Pantini noted that today's consumers are more interested in quality, sustainability, and lighter wines with lower alcohol content. The industry must also adapt to major trends such as climate change, technological innovation—including artificial intelligence—and geopolitical shifts that open new markets in South America, Eastern Europe, and Southeast Asia.

Sergio Dompè emphasized that Italian wine's value lies not only in export volume but also in its cultural significance and its role in preserving rural landscapes. He warned that success should not be taken for granted amid growing competition on quality and price.

Gaetano Marzotto highlighted the challenge posed by U.S. tariffs—currently at 15%—and stressed the need for investment to conquer new markets like China and Southeast Asia. He called for a unified approach similar to France's strategy.

Matteo Zoppas pointed out that teamwork across agencies is essential to address current difficulties in key markets like the U.S., where tariffs and currency fluctuations are hurting competitiveness.

Antonella Rossetti explained that the European Commission is aware of structural declines in wine consumption across Europe—especially for red wines—and is working on a "Wine Package" to give member states more flexibility in managing production without dismantling their vineyard heritage. She also mentioned upcoming EU funding for promotion campaigns aimed at supporting agri-food products including wine.

Federico Bricolo from Veronafiere said that while challenges like falling consumption and tariffs are shared by all major producers, Italy has unique strengths: innovation in products like Prosecco and a global network of Italian restaurants that support exports.

Ettore Prandini from Coldiretti called for greater international market knowledge without neglecting established markets like the U.S., as well as investments in technology such as drones for vineyard management and digitalization efforts with the Leonardo Committee.

Paolo De Castro from Nomisma expressed concern about proposed cuts to EU agricultural funding after 2027 and warned against policies that could weaken support for viticulture.

Lamberto Frescobaldi from UIV discussed Italy's large number of protected designations (over 500 DOPs and IGPs), which offer variety but can also fragment marketing efforts. He cautioned against calls to uproot vineyards without considering their economic and social importance.

Giacomo Ponti from Federvini noted that while U.S. tariffs create uncertainty for a market worth €2 billion annually to Italian producers, companies have so far managed by building up stocks before tariffs took effect; real impacts will be clearer in 2026.

Andrea Conzonato from Herita Marzotto Wine Estates said there is significant concern about how tariffs will affect pricing strategies going forward, especially since half the U.S. market consists of American wines not subject to these duties.

Marcello Lunelli from Ferrari Fratelli Lunelli addressed climate change's impact on viticulture, noting that rising temperatures may force producers to seek new regions or adapt their methods but also present opportunities to focus on quality over quantity.

Minister of Agriculture Francesco Lollobrigida acknowledged current difficulties but remained optimistic about Italy's reputation for quality at fair prices worldwide. He stressed that uprooting vineyards should be a last resort and highlighted ongoing promotional campaigns aimed at communicating responsible wine consumption as part of Italy's cultural heritage.

The conference made clear that while Italian wine faces significant headwinds—from climate change to shifting global trade dynamics—the sector continues to rely on its tradition of collaboration, innovation, and adaptability as it seeks new solutions for an evolving marketplace.