vinetur

Italy’s Wine Exports Fall 2.2% as Global Competition Pressures Prices

Packaged wines drive overall decline while bulk wine prices rise, signaling shifting demand and tighter margins for Italian producers

Friday, February 6, 2026



Italy’s wine exports showed a moderate decline in the first nine months of 2025, according to data from Italian customs analyzed by the Interprofessional Wine Organization of Spain (OIVE). The country exported €5.71 billion worth of wine, down

2.2% from the same period in 2024, with total volume falling 0.9% to 1.55 billion liters. The average export price dropped 1.3% to €3.70 per liter.

Packaged wines, which include sparkling, bottled, and bag-in-box formats, saw a decrease in both value and volume. From January to September 2025, packaged wine exports fell 2.3% in value to €5.49 billion and 0.3% in volume to 1.29 billion liters. The average price for packaged wines declined by 2% to €4.25 per liter.

Bulk wine exports presented a different trend. While the volume of bulk wine shipped abroad dropped by 3.4% to 253.7 million liters, the value increased by 0.6% to €228.3 million, driven by a 4.2% rise in the average price to €0.90 per liter.

The United States remained Italy’s top export market by value, accounting for €1.35 billion in the first nine months of 2025, though this represented a decrease of 4.1% compared to the same period last year. Germany followed with €840 million, up 2.3%. In terms of volume, Germany led with imports of 345 million liters (down 3.4%), while the U.S. imported 256 million liters (down 2.3%). The United Kingdom ranked third both in value (€587 million, down 2.3%) and volume (186 million liters, down 0.6%).

Other significant markets included Canada (€318 million, down 5.3%), Switzerland (€274 million, down 4.3%), France (€235 million, up 5%), the Netherlands (€185 million, up 8.7%), Belgium (€159 million, down 4.1%), Sweden (€143 million, up 6.6%), and Russia (€134 million, down a sharp 29%).

Within packaged wines, sparkling wine was the only subcategory that grew in volume (+2%) but still saw a slight drop in value (-0.6%) and a decrease in average price (-2.6%) to €4.21 per liter. Bottled wines under two liters suffered a decline of 3% in value and 1.3% in volume; their average price fell by 1.7% to €4.34 per liter. Bag-in-box wines experienced the steepest declines: value fell by 5.4%, volume by 3.8%, and average price by 1.7% to €2.35 per liter.

The divergence between packaged and bulk wine performance highlights changing dynamics in global demand and pricing power within Italy’s wine sector this year. While bulk wine managed to increase its unit price despite lower volumes—likely due to supply constraints—packaged wines faced downward pressure on prices amid intense

competition and selective demand.

France and the Netherlands stood out among European markets for their growth in both value and volume of Italian wine imports during this period, while Russia and the U.S., two major destinations, recorded notable declines.

The data suggest that Italy’s wine industry is navigating a challenging environment marked by shifting consumer preferences and heightened competition worldwide, forcing producers to adjust pricing strategies and focus on maintaining market share even at the expense of profit margins per unit sold.

The overall contraction in export value outpaced the drop in volume, indicating that Italian wineries are accepting lower prices rather than risk losing sales volumes abroad—a sign of competitive pressure across key international markets as global buyers become more price-sensitive.

These trends are being closely watched by industry analysts as they may signal longer-term shifts in how Italian wine is positioned globally and how producers respond to evolving market conditions through pricing, product mix, and destination focus for their exports throughout the remainder of the year and beyond.