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Spanish Wine Exports Fall Below 1.9 Billion Liters for First Time Since 2013

Bulk Wine and West African Markets Offer Rare Growth Amid Broad Declines in Bottled and Sparkling Categories

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Spanish wine exports closed 2025 with a decline of 5% in value and 3.4% in volume, according to data from the Spanish Tax Agency (AEAT) analyzed by the Interprofessional Wine Organization of Spain (OIVE). The total value reached €2.8795

billion, while the volume dropped to 1.8918 billion liters. This marks the first time since 2013 that Spain’s wine exports have fallen below 1.9 billion liters.

Compared to 2024, exports decreased by €151.15 million and 66.9 million liters. Despite this drop, the value figure for 2025 is still the fourth highest in Spain’s historical record. The AEAT’s annual update of export data for 2024 revised previous figures upward, confirming that year as a record with €3.0307 billion and 1.9588 billion liters exported.

December 2025 was particularly negative, with a year-on-year fall of 7.9% in value and 7.8% in volume compared to December 2024, totaling €217.45 million and 137.6 million liters for the month.

The analysis divides exports into two main groups: bottled wines (including fortified, sparkling, still, and bag-in-box formats) and bulk wines (in containers over 10 liters). In 2025, bottled wine exports fell in both value and volume, while bulk wine exports increased on both counts. Both categories saw an increase in average price.

Bottled wines reached 817.4 million liters (-7.9%) valued at €2.3307 billion (-7%), with an average price of €2.85 per liter (+1%). Within this group, sparkling wines saw a sharper decline in volume (-10.9%) than in value (-7.5%). Cava exports dropped significantly—down 11.5% in value and 19.2% in volume—while other sparkling wines grew by 4.9% in value and 10.2% in volume.

Cava accounted for 65% of the total sparkling wine export volume and 72% of its value, but its average price rose by 9.5% to €3.76 per liter, compared to €2.76 per liter for other sparkling wines (down by 4.8%). The United States remained the top market for Spanish sparkling wine, though sales there fell by 11.4% in value and by 13% in volume.

Still bottled wines also declined: those with Protected Designation of Origin (DOP) fell by 7.1% in value and by 9.9% in volume, reaching €1.181 billion and 228.5 million liters respectively; their average price increased by 3.1% to €5.17 per liter—the highest among all categories analyzed.

Varietal bottled wines lost 11.9% in value and 5.4% in volume, totaling €154.6 million and 89.1 million liters; their average price dropped by nearly 7%. Bottled wines with Protected Geographical Indication (IGP) also declined sharply: down by over 13% in value and nearly 15% in volume.

By color, both white and red/rosé still bottled wines declined, but reds/rosés suffered more: down by 9% in value and by 10% in volume compared to whites' declines of -3.4% (value) and -5.5% (volume). Since 2017, red/rosé bottled wine exports have lost €187 million in value and over 239 million liters in volume, while white bottled wines have grown by €127 million in value.

Fortified wines performed better than most categories, growing by over 3% in both value and volume to reach €56.5 million and 11.3 million liters; their average price was just over €5 per liter.

Bag-in-box wine exports rose slightly: up by just over €94,000 (+0.1%) to €86.9 million and up by about 0.8 million liters (+1.2%) to reach nearly 70 million liters exported at an average price of €1.25 per liter.

Bulk wine exports were a bright spot for Spain's industry in an otherwise challenging year: they grew by nearly 5% in value (€548.8 million) and marginally (+0.3%) in volume (1.0744 billion liters), with an average price increase of more than 4%. Bulk varietal wine led this growth with a rise of over 7% in value.

The main destinations for Spanish bulk wine remain Germany, France, and Italy—countries that are also major producers themselves—accounting for about two-thirds of Spain's bulk wine export volume.

Costa de Marfil emerged as a standout market for Spanish bulk wine, increasing its imports by more than three-quarters in value (+76%) and nearly half (+48%) in volume compared to the previous year.

Among other grape-derived products, Spain exported less aromatized wine (-5.5% in volume; -7.9% in value), but must (grape juice) exports grew by almost 4% in value despite falling volumes; vinegar exports also rose both in quantity (+4%) and value

(+4.9%).

The overall context for Spanish wine exports is one of structural adjustment after a record-setting year in 2024, with the sector focusing on defending prices amid global consumption challenges rather than maximizing volumes at any cost.

The industry faces particular challenges with DOP bottled wines and Cava due to pricing strategies that may be limiting demand abroad, while growth opportunities are emerging for white varietals, bulk formats like bag-in-box, and new markets outside Europe such as West Africa.

Looking ahead to late-2026 when final figures for this year will be published, it is expected that some provisional numbers may be revised upward as has happened previously with AEAT data updates.

Spain’s wine sector is now tasked with balancing its traditional strengths against changing global demand patterns—shifting toward higher-value products where possible while seeking new markets beyond its established European base.