



Dijon, France, 12 May 2026

STATE OF THE WORLD WINE SECTOR IN 2025: Tariffs, climate and consumer trends drive sector adaptation

The International Organisation of Vine and Wine (OIV) released today its annual overview of the state of the world wine sector, presenting data on production, consumption and international trade in 2025.

The latest figures show a global wine sector that is reacting to the real-time impacts of trade policies while also adapting to longer term changes in terms of climate and consumption.

The value of global trade remains at significantly higher levels than pre-COVID, although both volume and value decreased in 2025 due to tariff policies and economic factors. Production was impacted by climate events in both hemispheres, resulting in a low global vintage for the third consecutive year. This helped to offset the impacts of a decline in global consumption in recent years, driven again by economic pressures on consumers as well as by shifting patterns of consumption in mature markets.

OIV Director General John Barker said:

“Over the past few years, the wine sector has been adapting to ongoing climatic, economic and societal challenges. In 2025, the disruption to international trade through tariff policies was yet another external impact that producers, exporters and supply chain must manage.

Overall, the sector is showing its resilience, both looking for new market opportunities and adjusting production capacity in line with demand. Trade and product value remain strong and recent bilateral or multilateral trade agreements will help to create positive conditions for evolving markets.

The OIV will continue to support its members and the sector by sharing key data, developing science-based standards and recommendations, and promoting international cooperation to progress our shared interests.”

📺 The complete video presentation by OIV Director General John Barker is available [here](#)



KEY HIGHLIGHTS

Gradual adjustment of the global vineyard

The global vineyard surface area declined for the sixth consecutive year, reaching 7.0 million hectares in 2025 (-0.8%/2024) as major vine-growing countries in both hemispheres tailor their vineyard area to market conditions.

Wine production remains below historical averages

Global wine production is estimated at 227 million hectoliters in 2025, slightly above the historically low 2024 level (+0.6%). Climatic variability continued to affect production across many regions. Additionally, production in some major regions was impacted by decisions to reduce production capacity. By contrast, countries such as Brazil, New Zealand, South Africa, and Moldova benefited from a rebound after reduced 2024 vintages.

Consumption trends continue to evolve

World wine consumption is estimated at 208 million hectoliters in 2025, down 2.7% compared with 2024. This reflects the combined effect of long-term structural shifts in mature markets, changing consumer behavior and recent economic pressure on purchasing power. Key growth markets for 2025 were Portugal, Brazil, Japan and parts of Eastern and Central Europe.

International wine trade contracts

The value of global trade remains at significantly higher levels than pre-COVID, although global wine exports declined to 94.8 million hectoliters in 2025 (-4.7%), while export value fell to 33.8 billion EUR (-6.7%). The reduction in trade volumes reflects weaker global demand and increased uncertainty linked to tariff policies and broader trade tensions. Notably, U.S. wine imports declined to 5.5 billion euros down 12% compared with 2024. Despite this downturn, the proportion of wine that is traded globally remains at a high level (46%).

Market balance remains broadly contained

A third year of comparatively low global production means that production and consumption are broadly balanced, minimizing the impact of lower consumption on stock levels.

While production appears higher than consumption, industrial uses such as distillation, vinegar, wine-based products and spirits must be taken into account. These uses are estimated to average approximately 30 million hectoliters annually. In 2025, the gap between wine global production and consumption is estimated at around 18.7 million hectoliters.

The detailed OIV State of the World Wine Sector in 2025 report is [available in English](#).



Editor's note:

The International Organisation of Vine and Wine (OIV)

The OIV is a scientific and technical intergovernmental organisation, and the world reference to the vine and wine sector.

The OIV currently has 51 Member States, countries producing and consuming grapes and wine, which account for 90% of the world's vineyard surface area, 88% of global wine production and 75% of global wine consumption. Twice a year over 500 experts come together to assess, discuss and approve by consensus resolutions on the following:

- 1/ Viticulture and table grapes
- 2/ Oenology and methods of analysis
- 3/ Law and economics of the vine and wine
- 4/ Consumer health and safety

For a century the OIV has been at the forefront of all global vitivincultural matters, providing standards, guidance and information for the vine and wine sector.

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Intergovernmental Organisation
Created on 29 November 1924 • Restructured on 3 April 2001

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