



INTERNATIONAL ORGANISATION  
OF VINE AND WINE

# STATE OF THE WORLD WINE SECTOR IN 2025

John Barker, OIV Director General  
12 May 2026



INTERNATIONAL ORGANISATION  
OF VINE AND WINE

## Data

Vineyard Surface Area

Wine Production

Wine Consumption

International Trade in Wine

Main Challenges for  
the Global Wine Sector:  
Looking Ahead



WORLD  
CONGRESS **47**<sup>th</sup>  
OF VINE AND WINE



2026·第47届世界葡萄与葡萄酒大会



# Vineyard Surface Area



Grape for all uses



9% drop since 2000

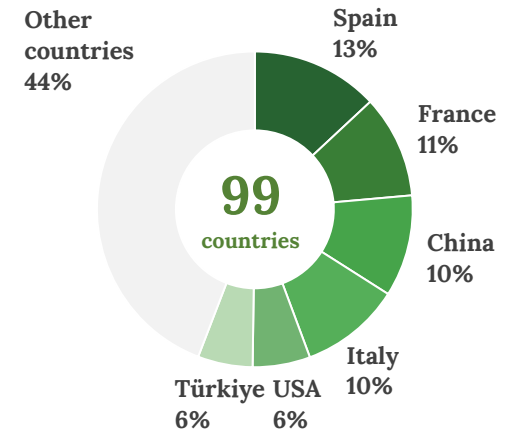
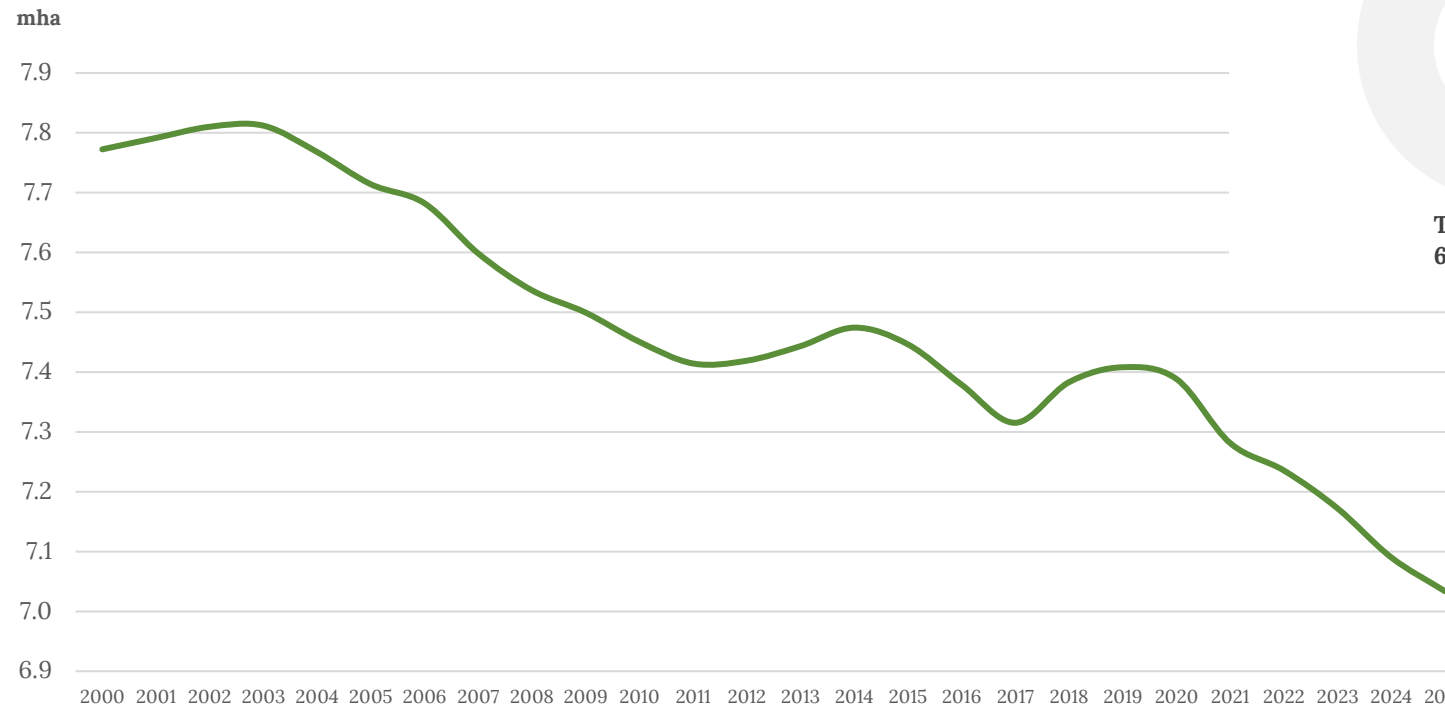


EU = 45%  
SH = 12%

# Vineyard Surface Area

Vineyards destined for the production of all types of grapes, including both bearing and non-bearing areas

## Evolution of world vineyard surface area



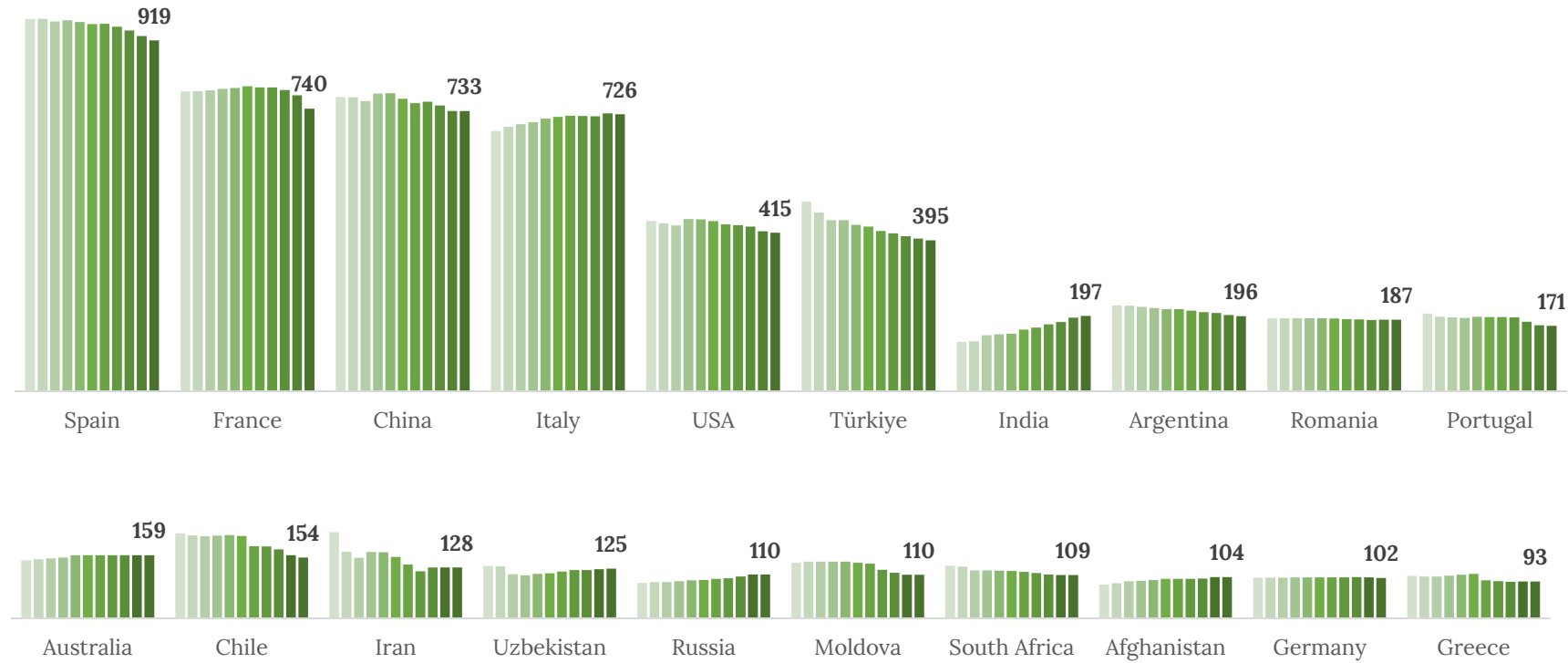
**7.0 mha**  
-0.8%/2024



# Vineyard Surface Area

Vineyards destined for the production of all types of grapes, including both bearing and non-bearing areas

Major countries by vineyard surface area (1000 ha), 2016-2025



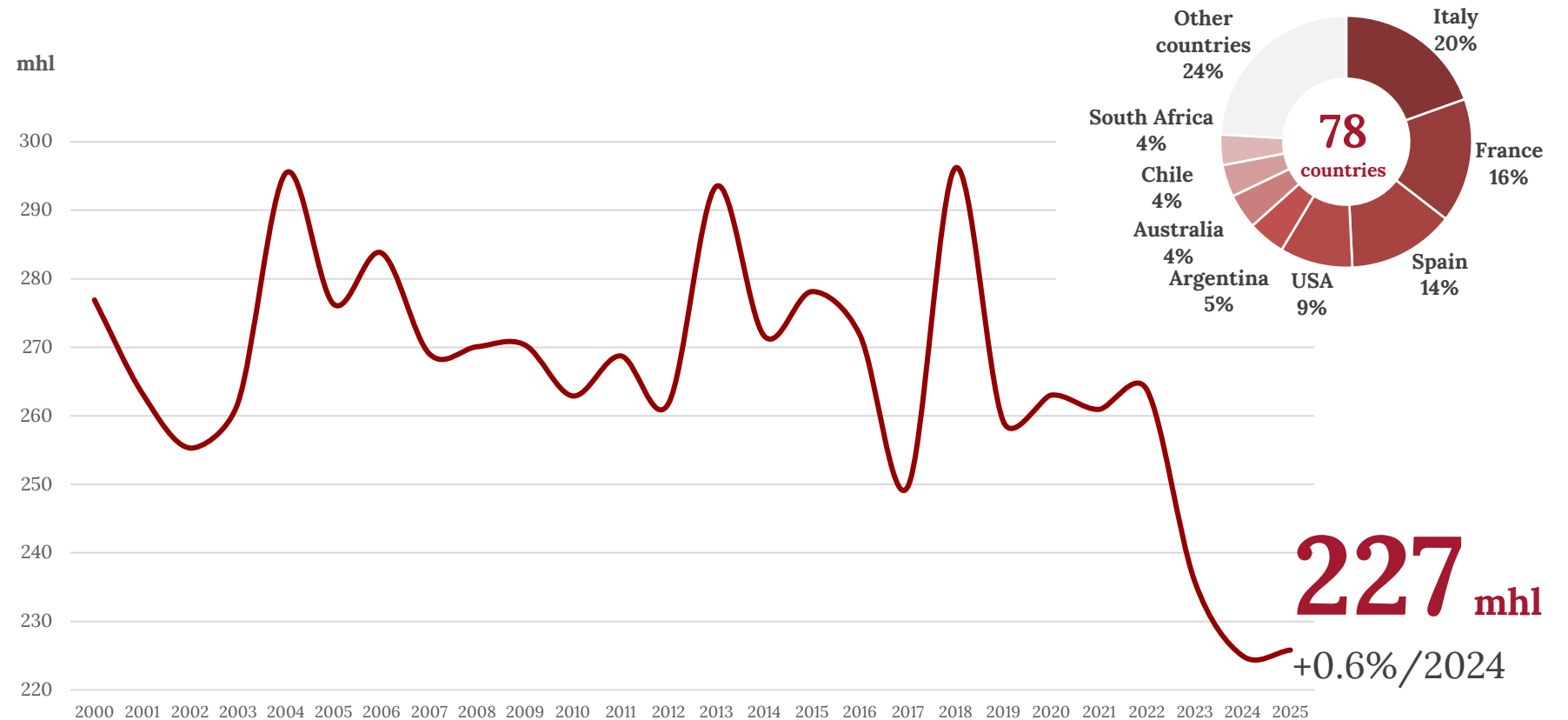


# Wine Production

# Wine Production

Wine production refers to the production of wine excluding musts and juices

## Evolution of world wine production



13% below the 10-year average



Extreme meteorological events



Adaptation to demand

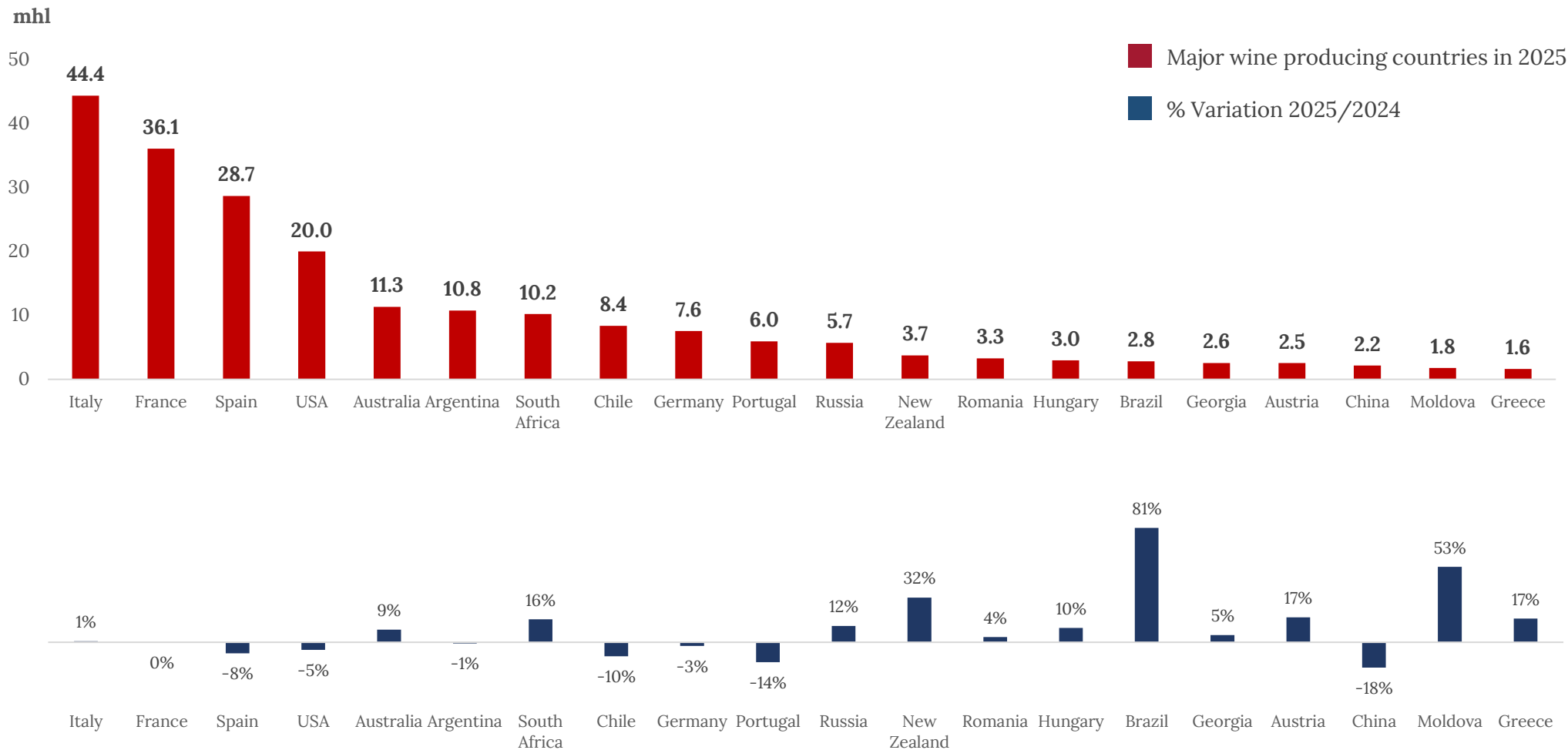


EU = 60%  
SH = 22%



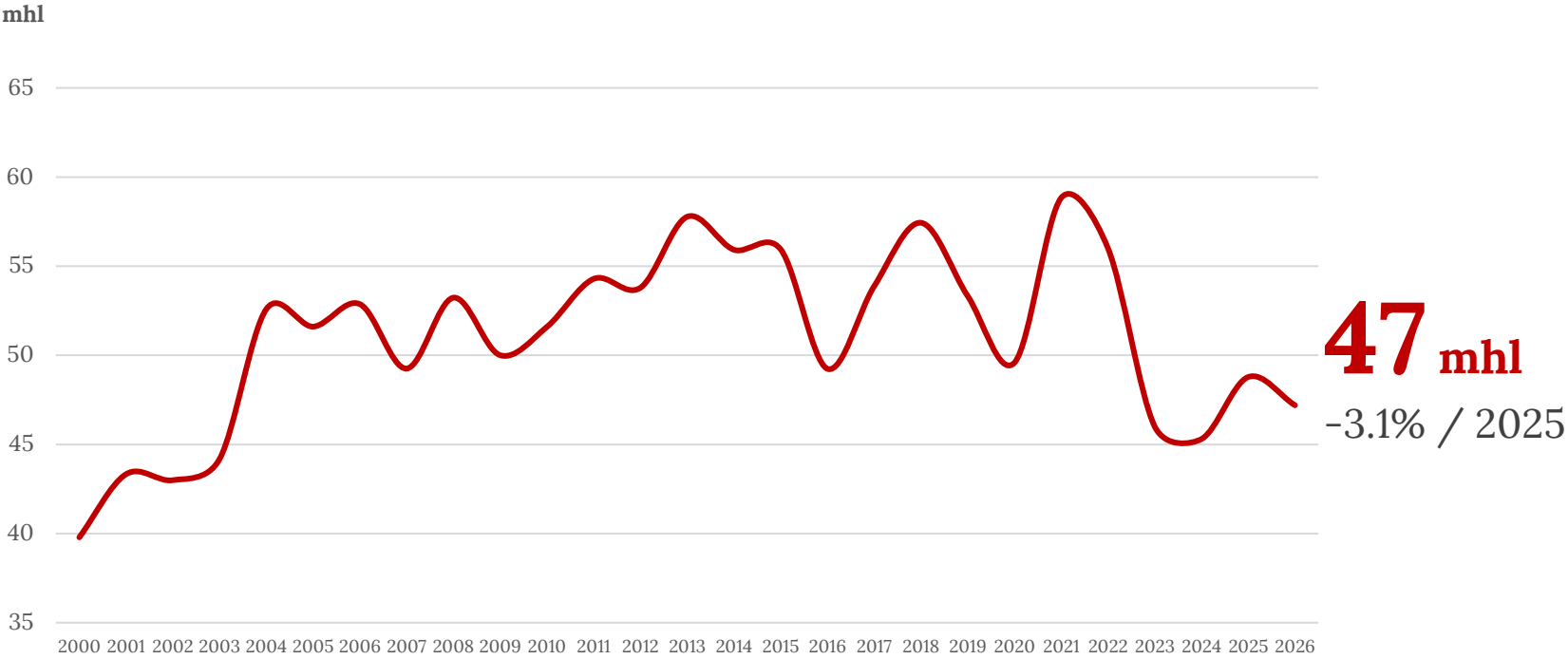
# Wine Production

Wine production refers to the production of wine excluding musts and juices



# First Estimates Wine Production 2026

## Evolution of Southern Hemisphere Wine Production, 2000-2026



### 2026 vs. 2025

Argentina



Chile



Brazil



South Africa



Australia



New Zealand



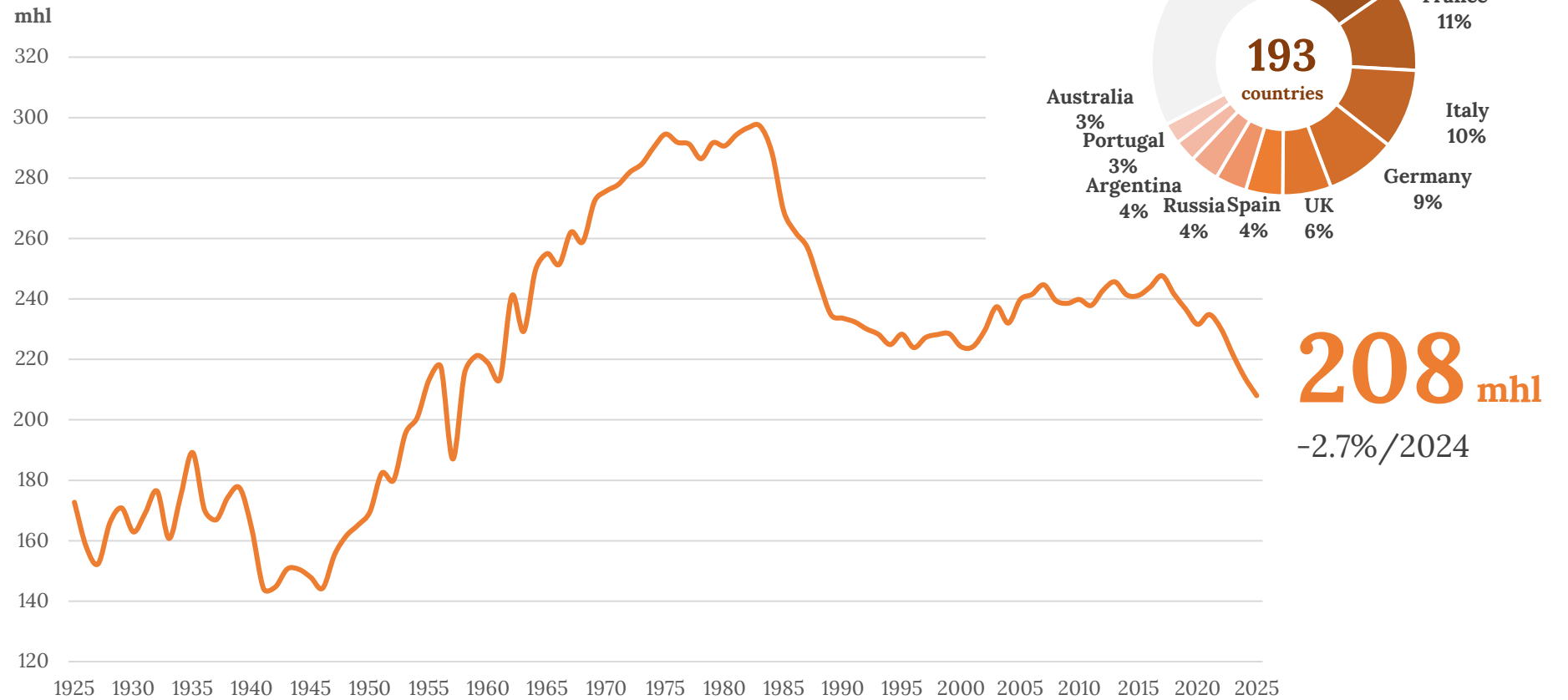


# Wine Consumption

# Wine Consumption

Wine consumption refers to the consumption of wine, including still, sparkling, and special wines

## Evolution of world wine consumption



Lowest since 1957



Shifting consumers' preference



Decline in mature markets



Generational change



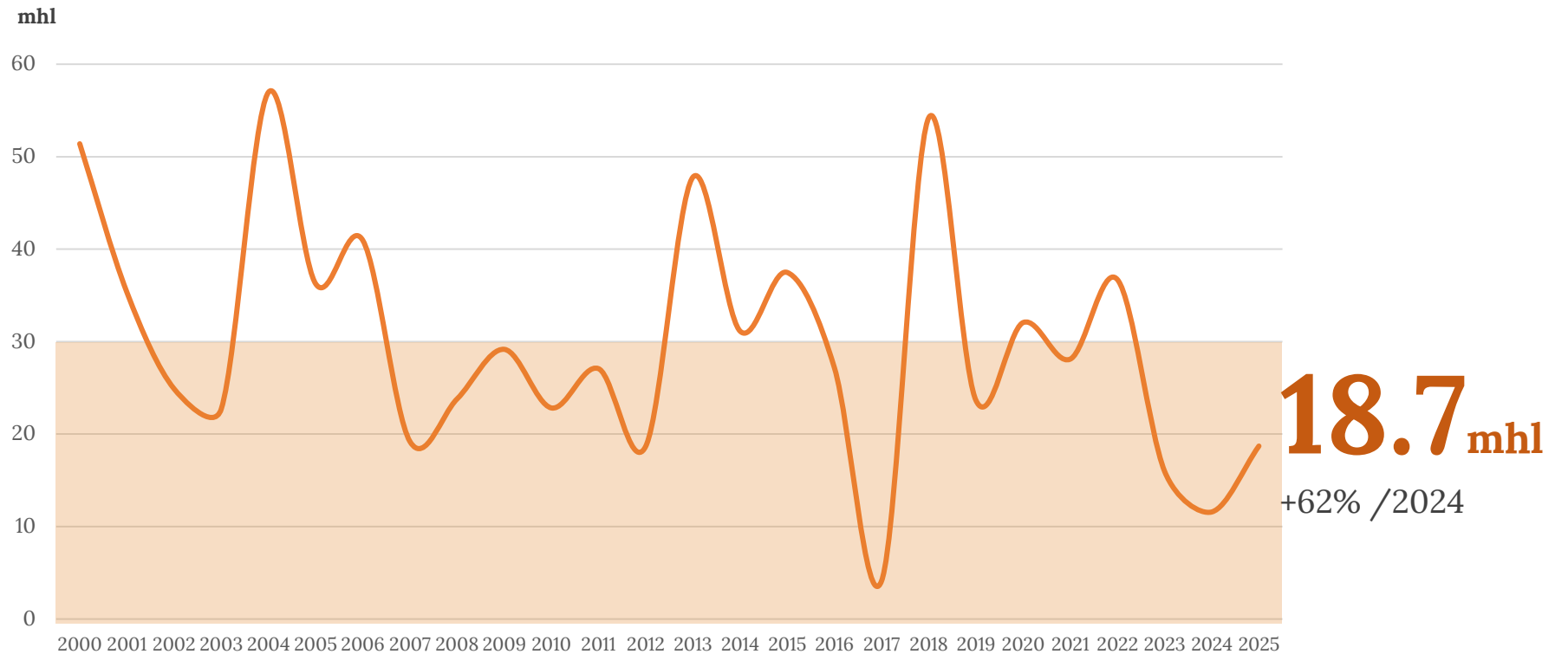
EU = 48%



# Wine Consumption

Wine consumption refers to the consumption of wine, including still, sparkling, and other special wines

## Evolution of world wine production-consumption gap



Industrial uses  
≈ 30 mhl



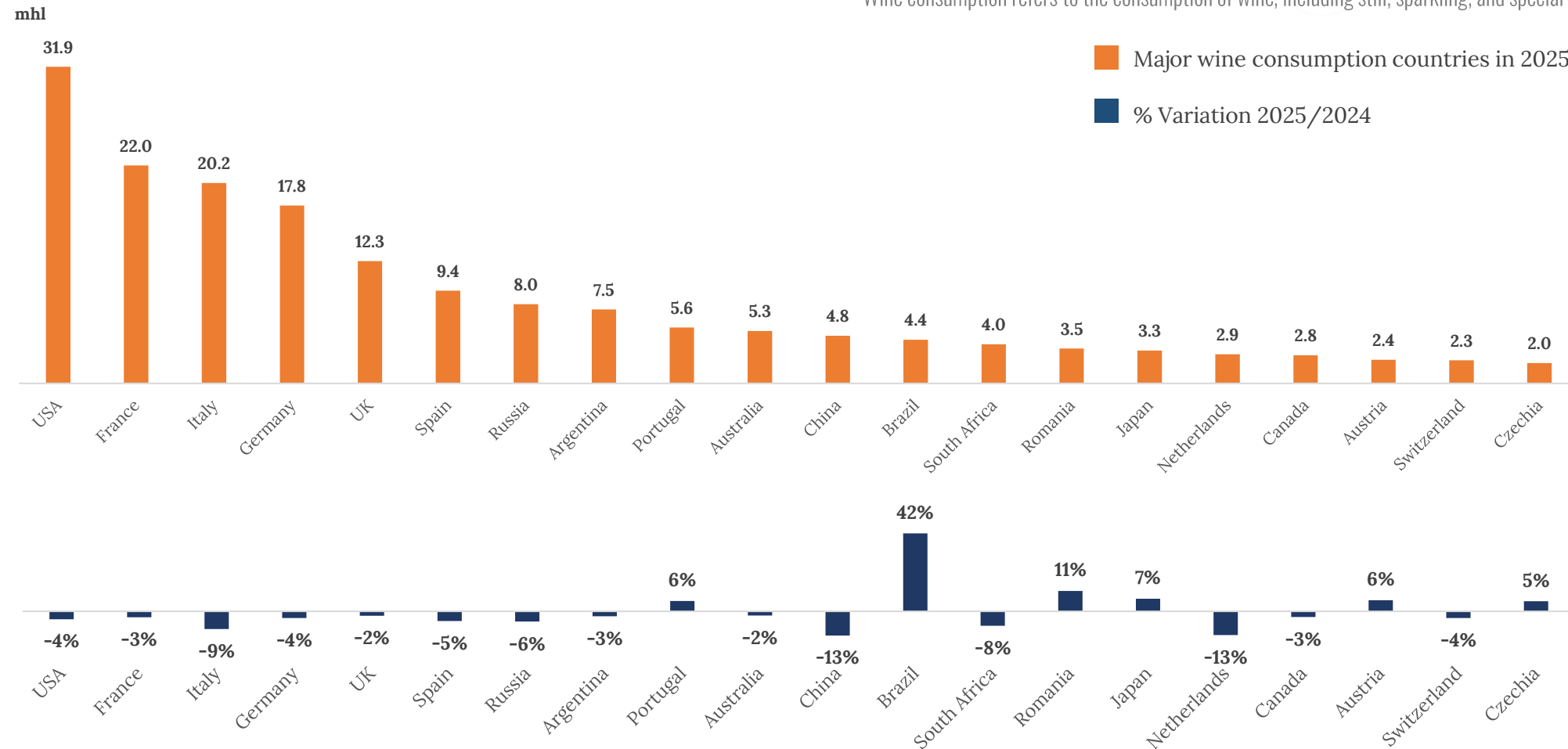
Market rebalancing



Large fluctuations

# Wine Consumption

Wine consumption refers to the consumption of wine, including still, sparkling, and special wines



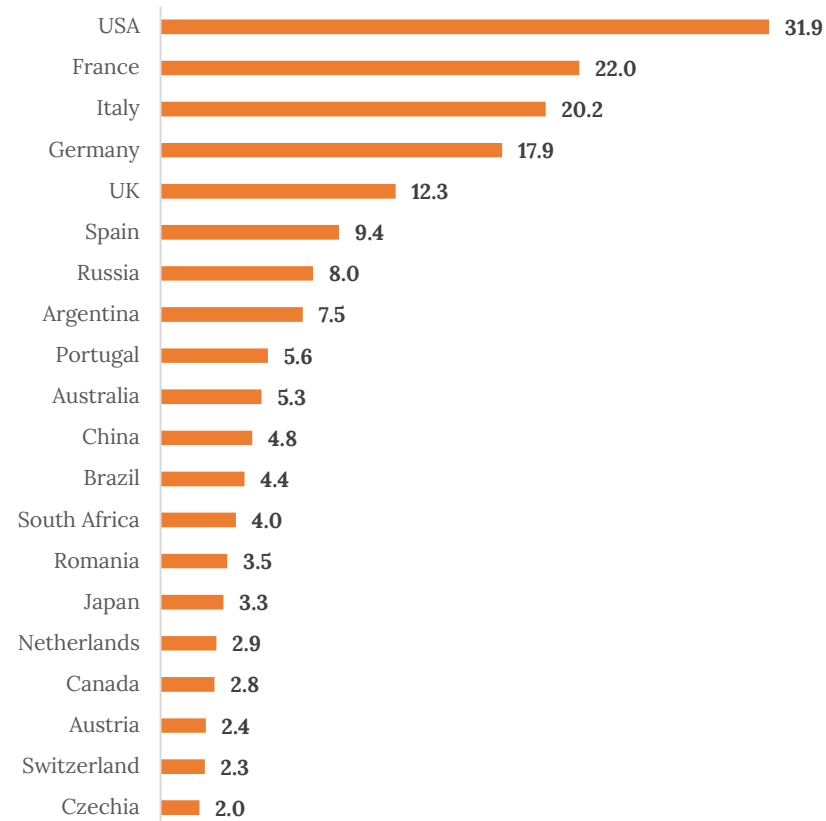


# Wine Consumption

Wine consumption refers to the consumption of wine, including still, sparkling, and special wines

## Major countries\* by total consumption in 2025

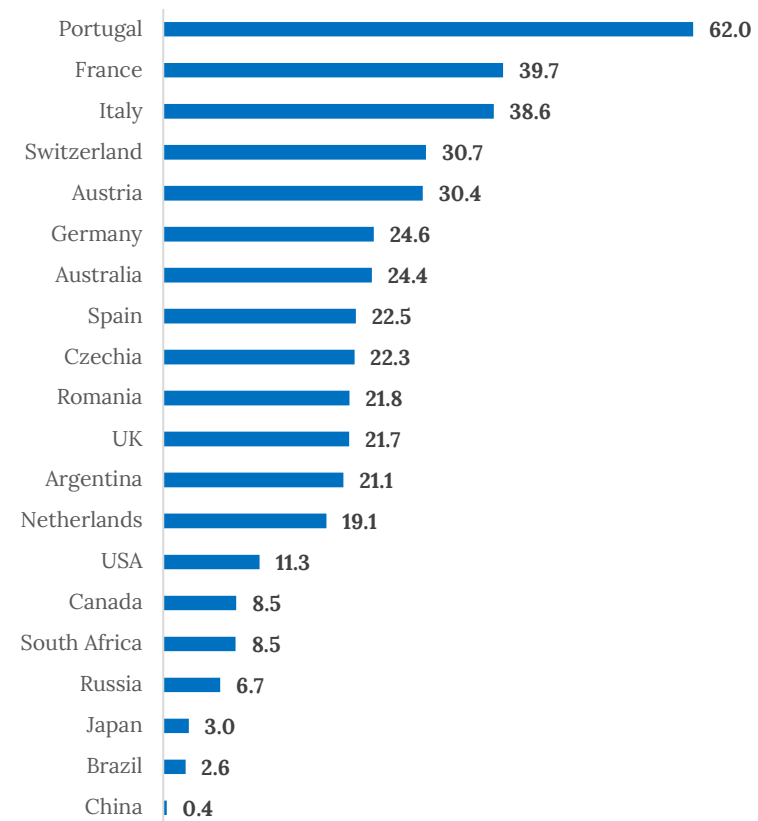
mhl



\*Countries with 2025 wine consumption above 2 mhl

## Consumption per capita 15+ in major consuming countries\* in 2025

l/ capita





# International Trade in Wine



Geopolitical uncertainty  
& complex trade  
environment



Low production

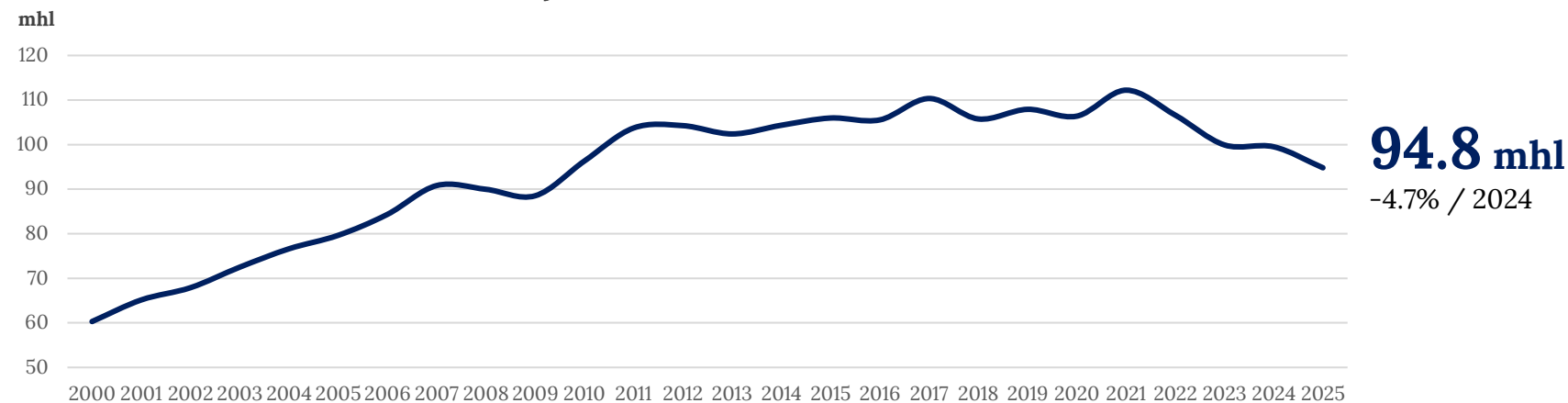


Softening of  
global demand

# International Trade in Wine

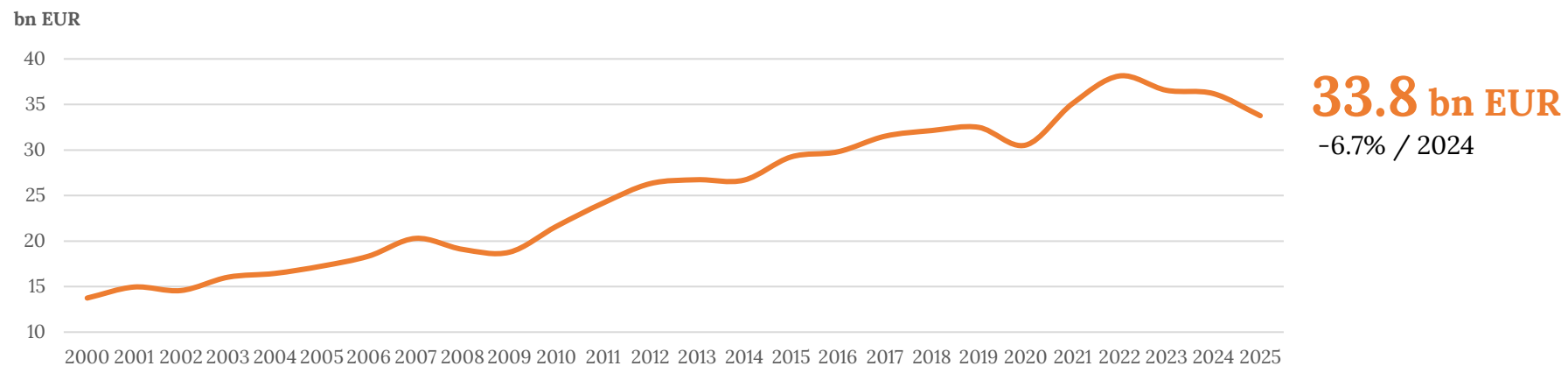
International trade of wine refers to import/export of wine (HS code 2204)

## Evolution of international trade in wine by VOLUME



**94.8 mhl**  
-4.7% / 2024

## Evolution of international trade in wine by VALUE

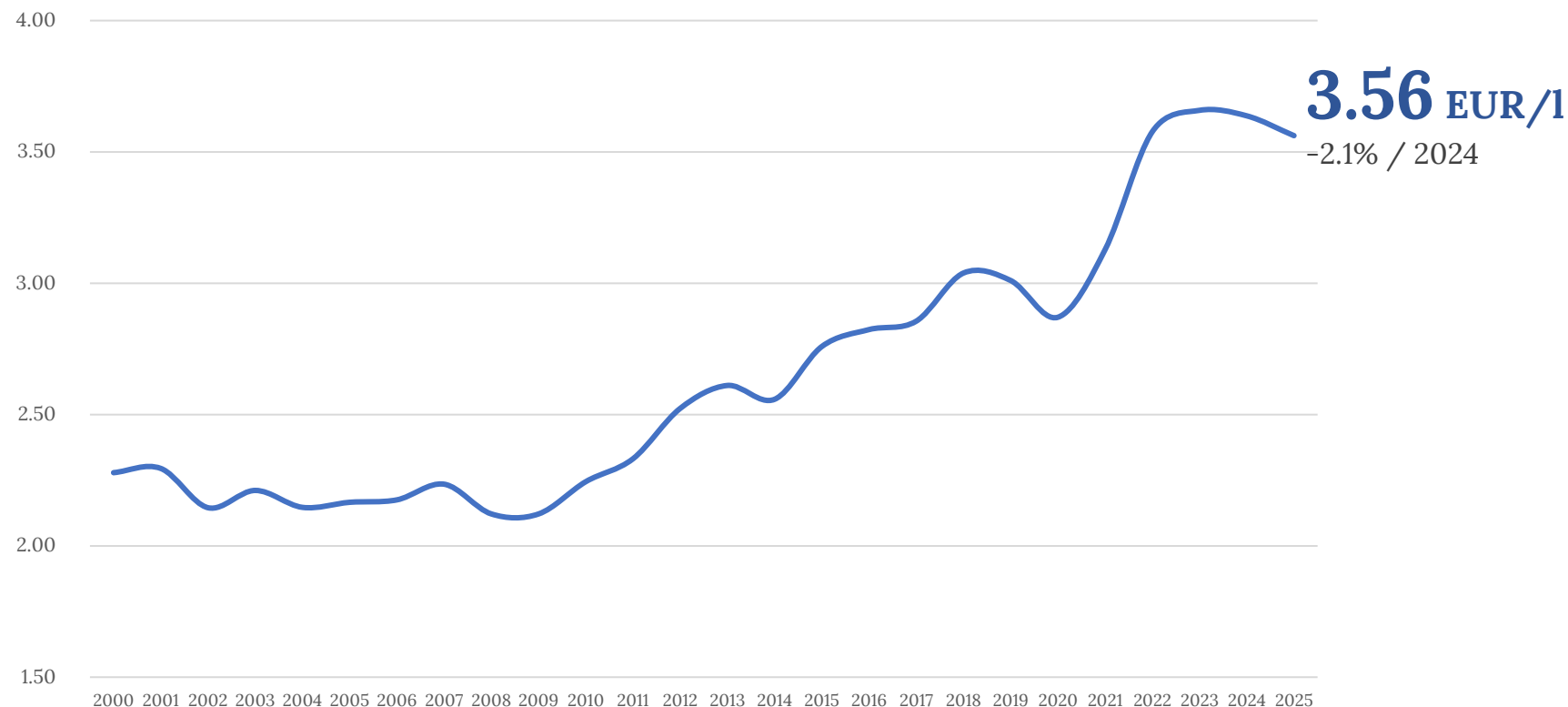


**33.8 bn EUR**  
-6.7% / 2024

# International Trade in Wine

International trade of wine refers to import/export of wine(HS code 2204)

### Evolution of world average FOB price (EUR/l)



3rd highest recorded



Ease on inflation

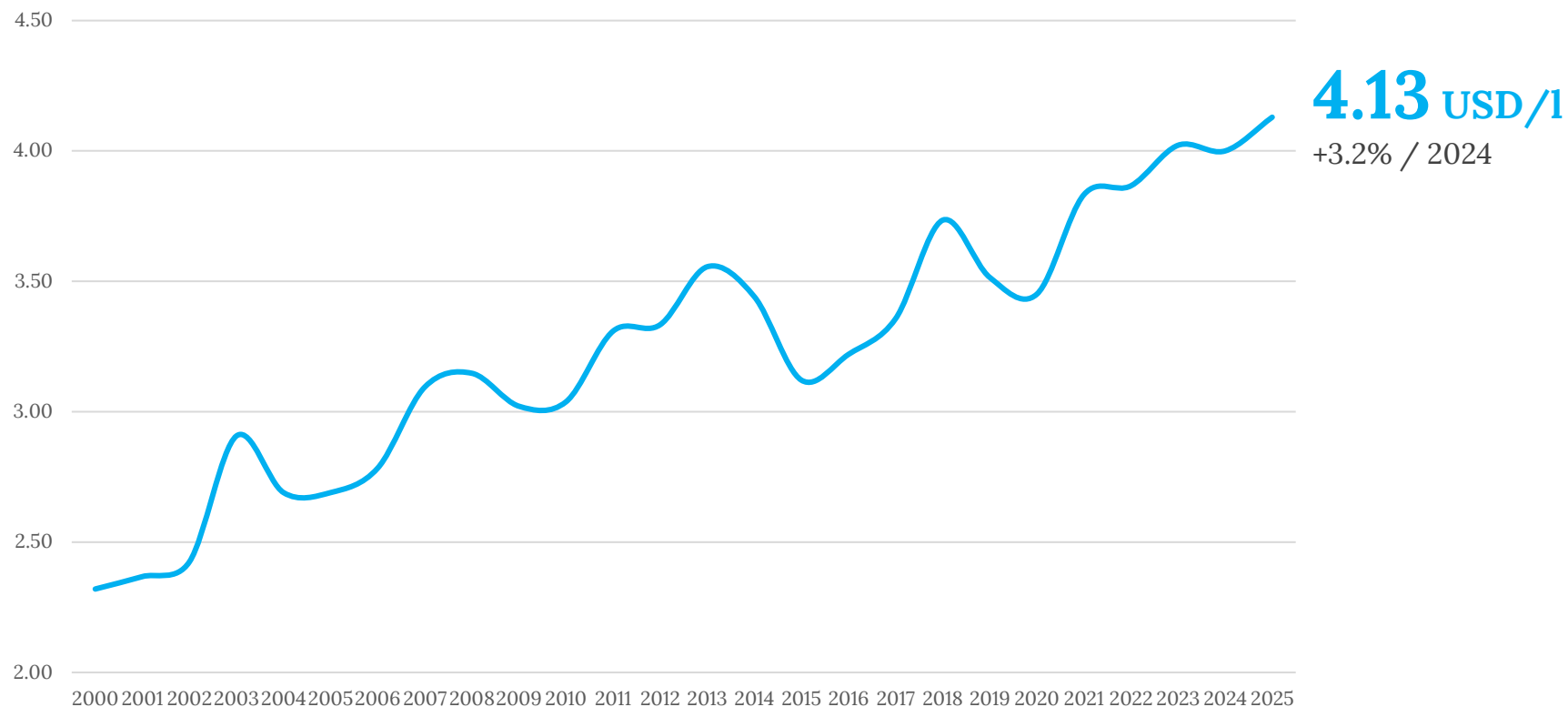


+24% / 2020

# International Trade in Wine

International trade of wine refers to import/export of wine(HS code 2204)

### Evolution of world average FOB price (USD/l)



Highest ever recorded



Depreciation vs EUR



+20% / 2020



### Bottled



48.5 mhl -5.7%  
 21.9 bn EUR -8.9%  
 4.53 EUR/l -3.3%

### Sparkling



10.6 mhl -2.7%  
 8.0 bn EUR -6.1%  
 7.54 EUR/l -3.5%

### Bag-in-Box



3.4 mhl -5.0%  
 0.6 bn EUR -4.8%  
 1.89 EUR/l +0.3%

### Bulk

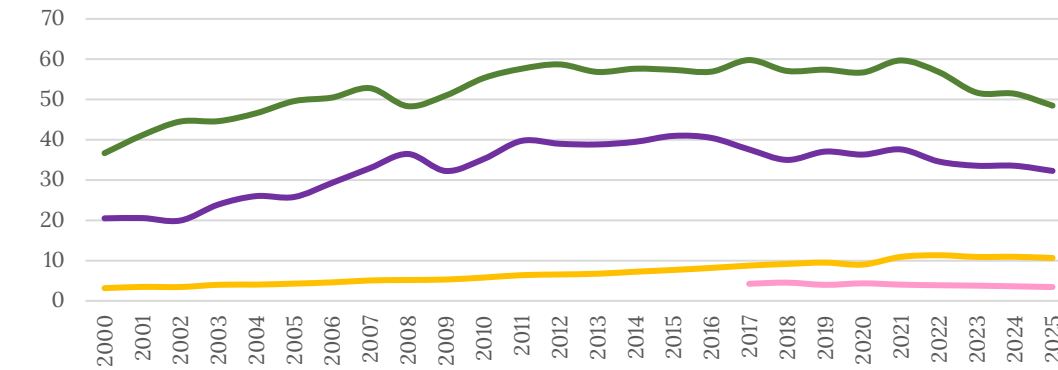


32.3 mhl -3.8%  
 2.4 bn EUR -5.3%  
 0.75 EUR/l -1.5%

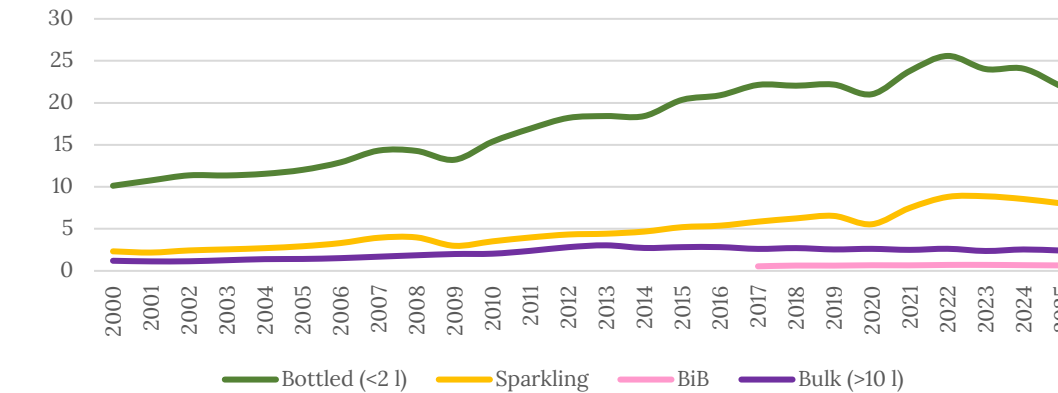
## International Trade in Wine

International trade of wine refers to import/export of wine(HS code 2204)

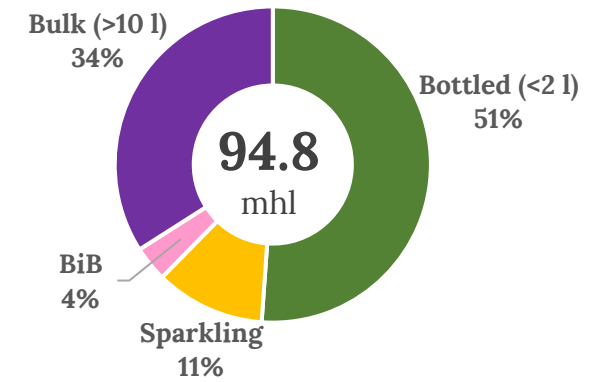
mhl



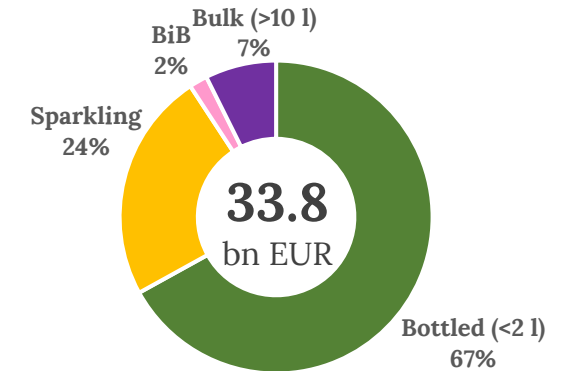
bn EUR



Breakdown of global trade VOLUME in 2025

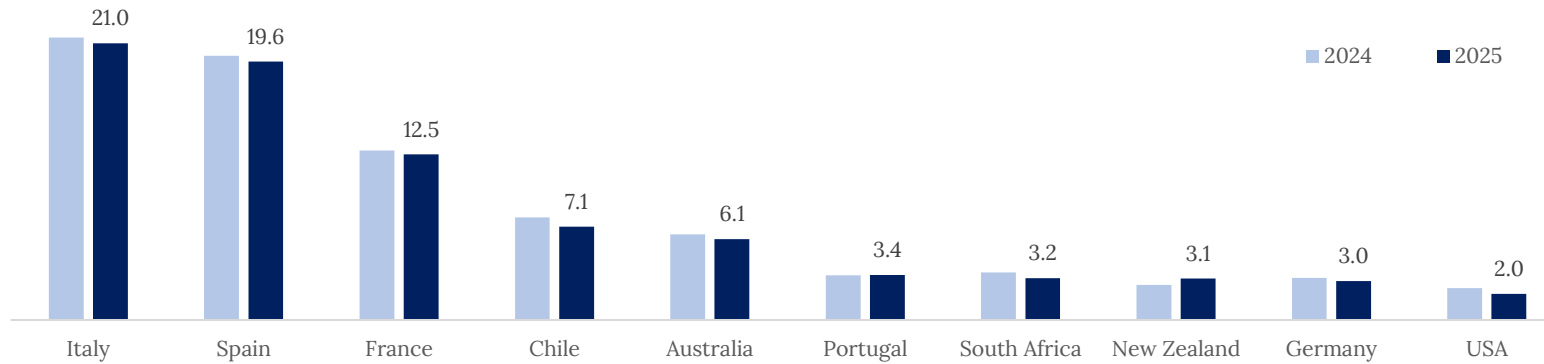


Breakdown of global trade VALUE in 2025



# Main Wine Exporters

## Top 10 exporters by VOLUME (million hl)



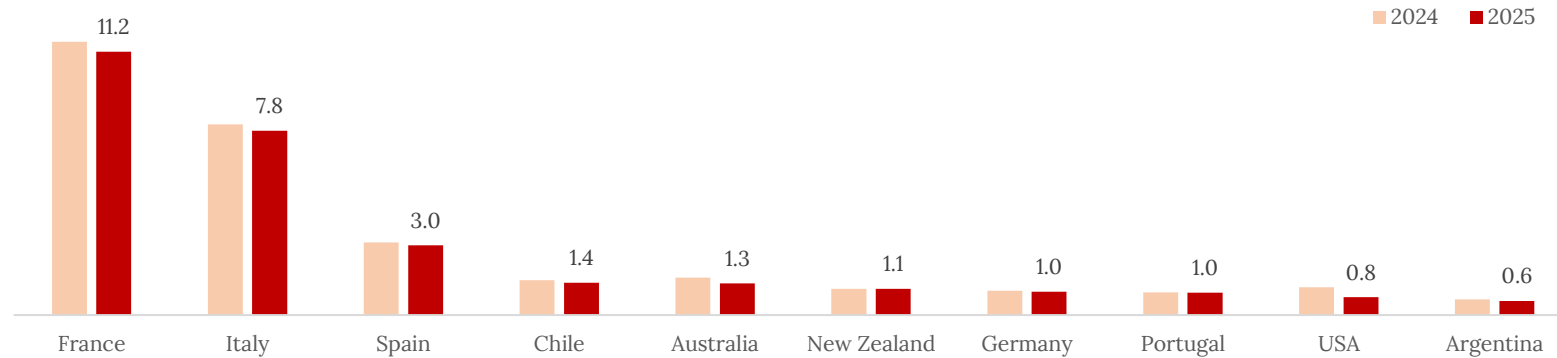
### 2025 vs. 2024

ITA	-2%
ESP	-2%
FRA	-2%
CHL	-9%
AUS	-6%
PRT	+1%
ZAF	-12%
NZL	+18%
DEU	-7%
USA	-18%

### 2025 vs. 2024

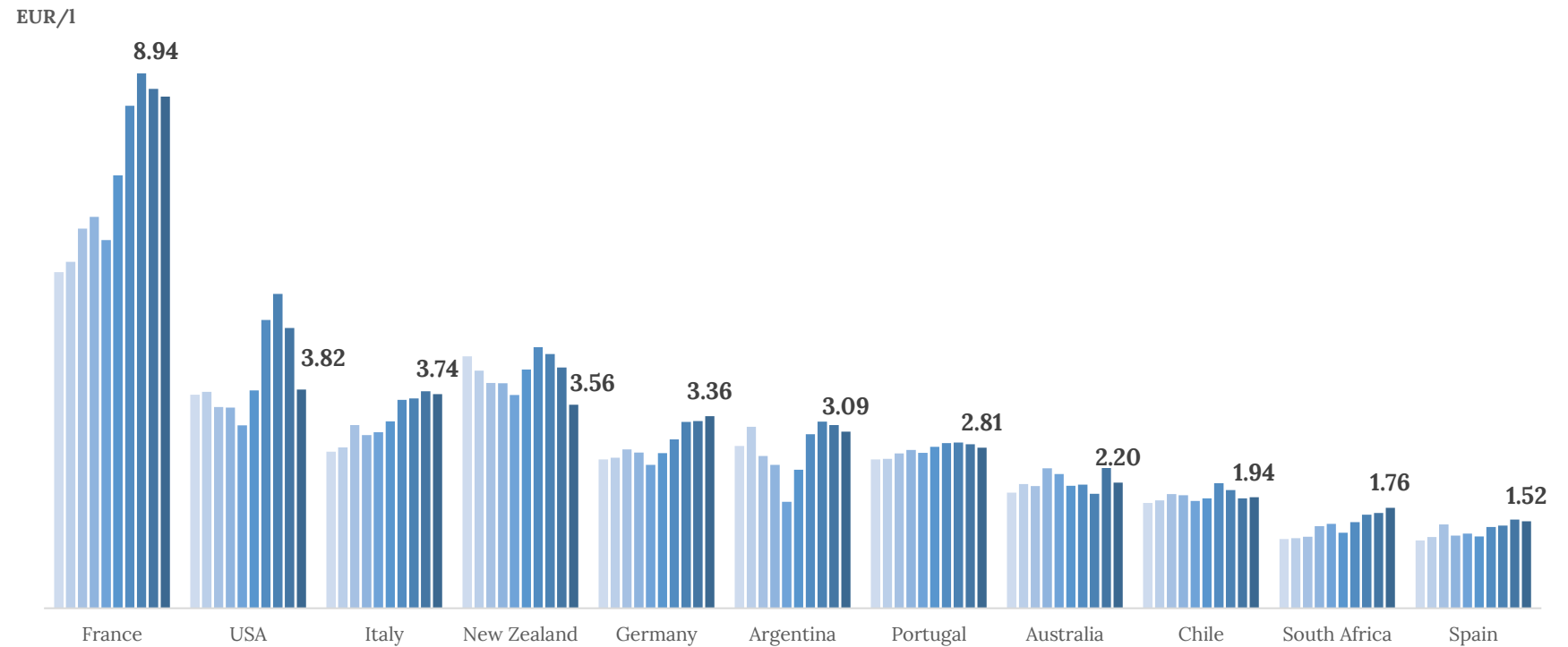
FRA	-4%
ITA	-3%
ESP	-4%
CHL	-8%
AUS	-15%
NZL	-0.5%
DEU	-5%
PRT	-1%
USA	-36%
ARG	-10%

## Top 10 exporters by VALUE (billion EUR)



# Main Wine Exporters

Major Exporters by Average FOB Price (EUR/l), 2016-2025



\*Countries listed as top 10 exporters, by volume or value in 2025

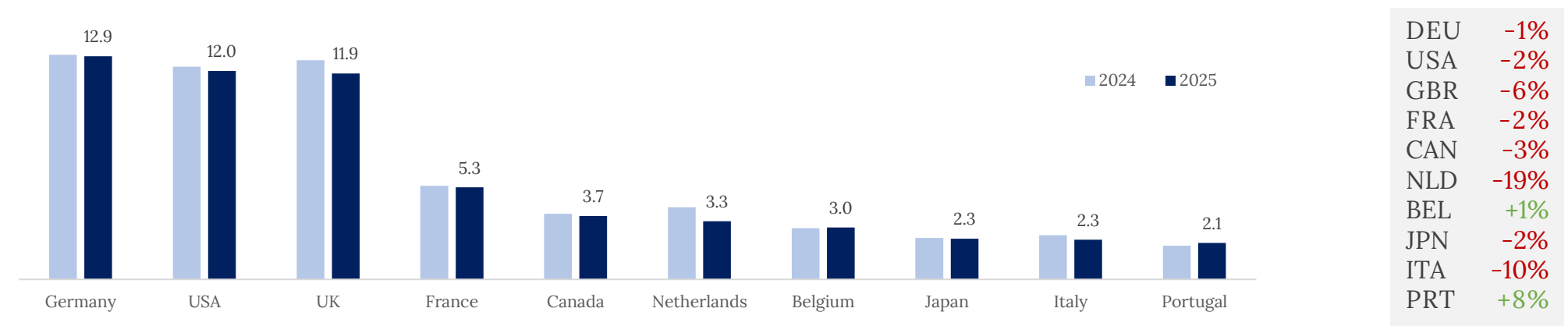
## 2025 vs. 2024

FRA	-1%
USA	-22%
ITA	-1%
NZL	-15%
DEU	+3%
ARG	-4%
PRT	-2%
AUS	-10%
CHL	+1%
ZAF	+5%
ESP	-2%



# Main Wine Importers

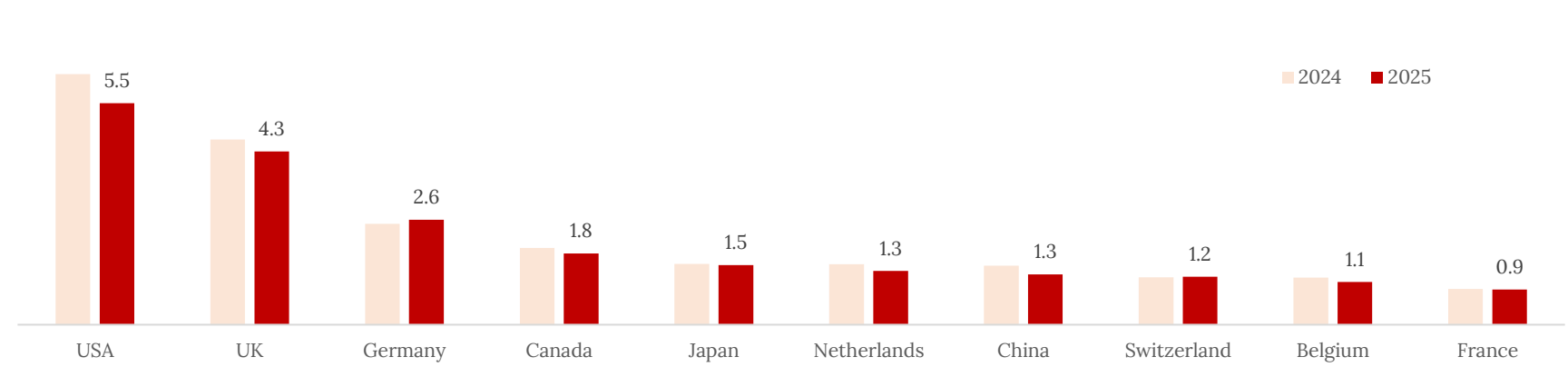
## Top 10 importers by VOLUME (million hl)



## 2025 vs. 2024

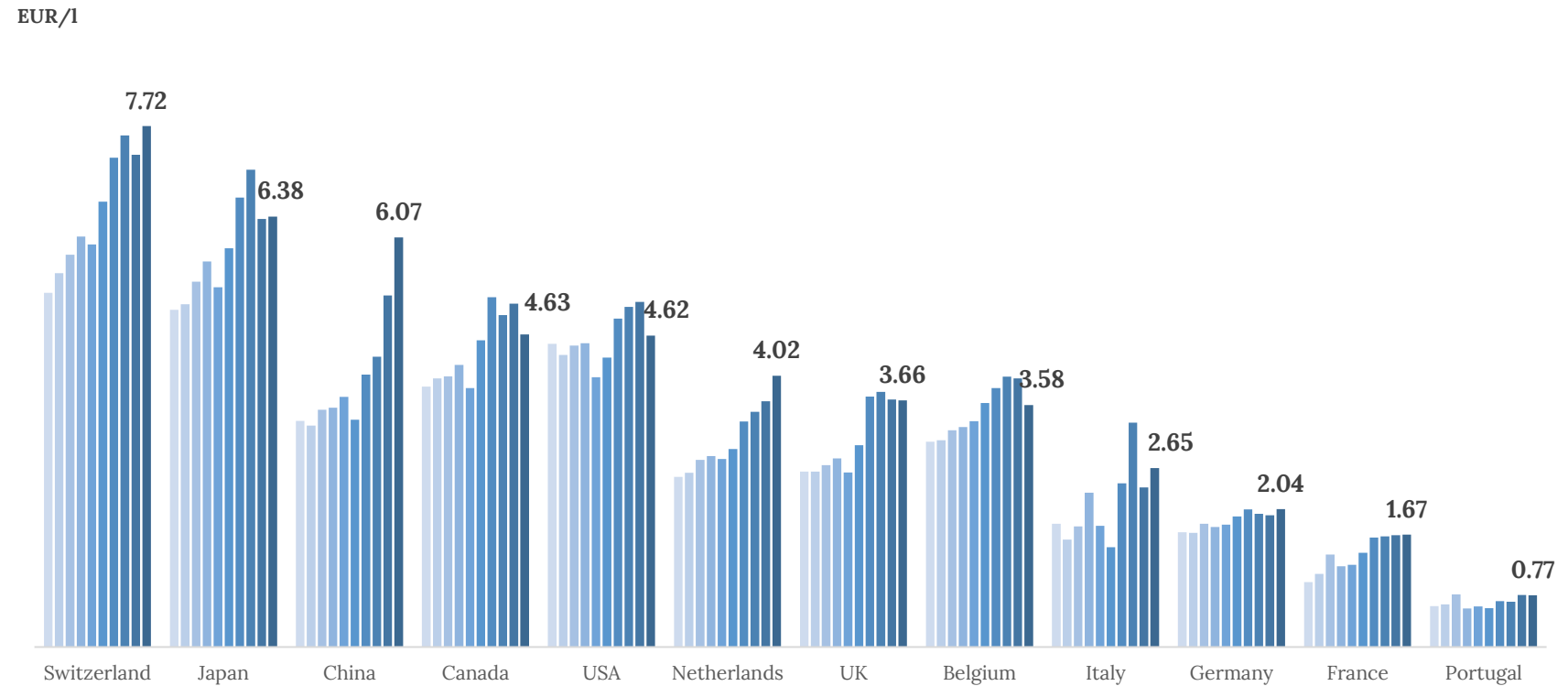
USA	-12%
GBR	-6%
DEU	+4%
CAN	-7%
JPN	-2%
NLD	-11%
CHN	-15%
CHE	+1%
BEL	-9%
FRA	-1%

## Top 10 importers by VALUE (billion EUR)



# Main Wine Importers

Major Importers\* by Average FOB Price(EUR/l), 2016-2025



\*Countries listed as top 10 importers, by volume or value in 2025

## 2025 vs. 2024

CHE	+6%
JPN	+1%
CHN	+17%
CAN	-9%
USA	-10%
NLD	+10%
GBR	+0%
BEL	-10%
ITA	+12%
DEU	+5%
FRA	+0.5%
PRT	-1%

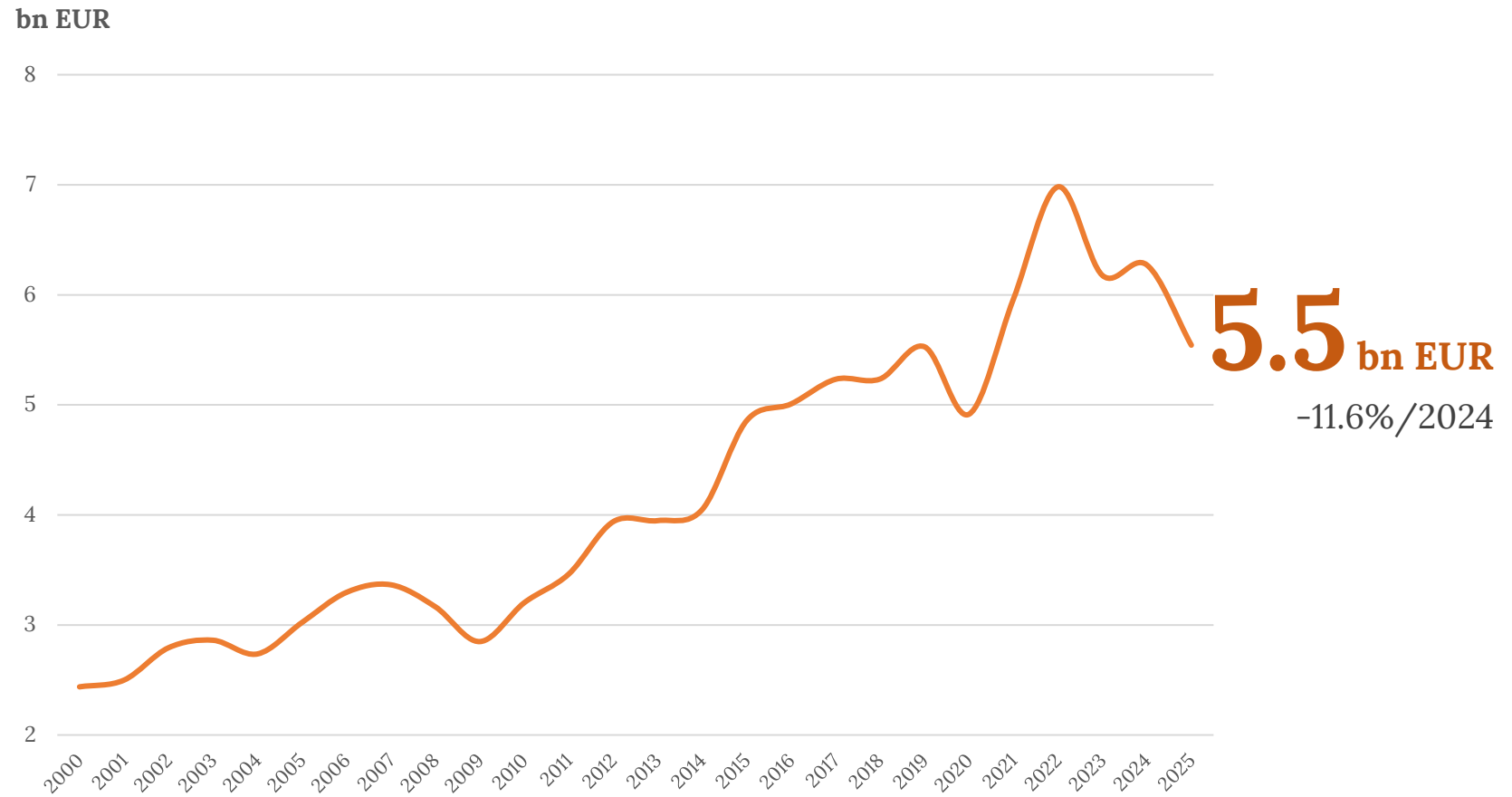


# 2025 USA Tariffs

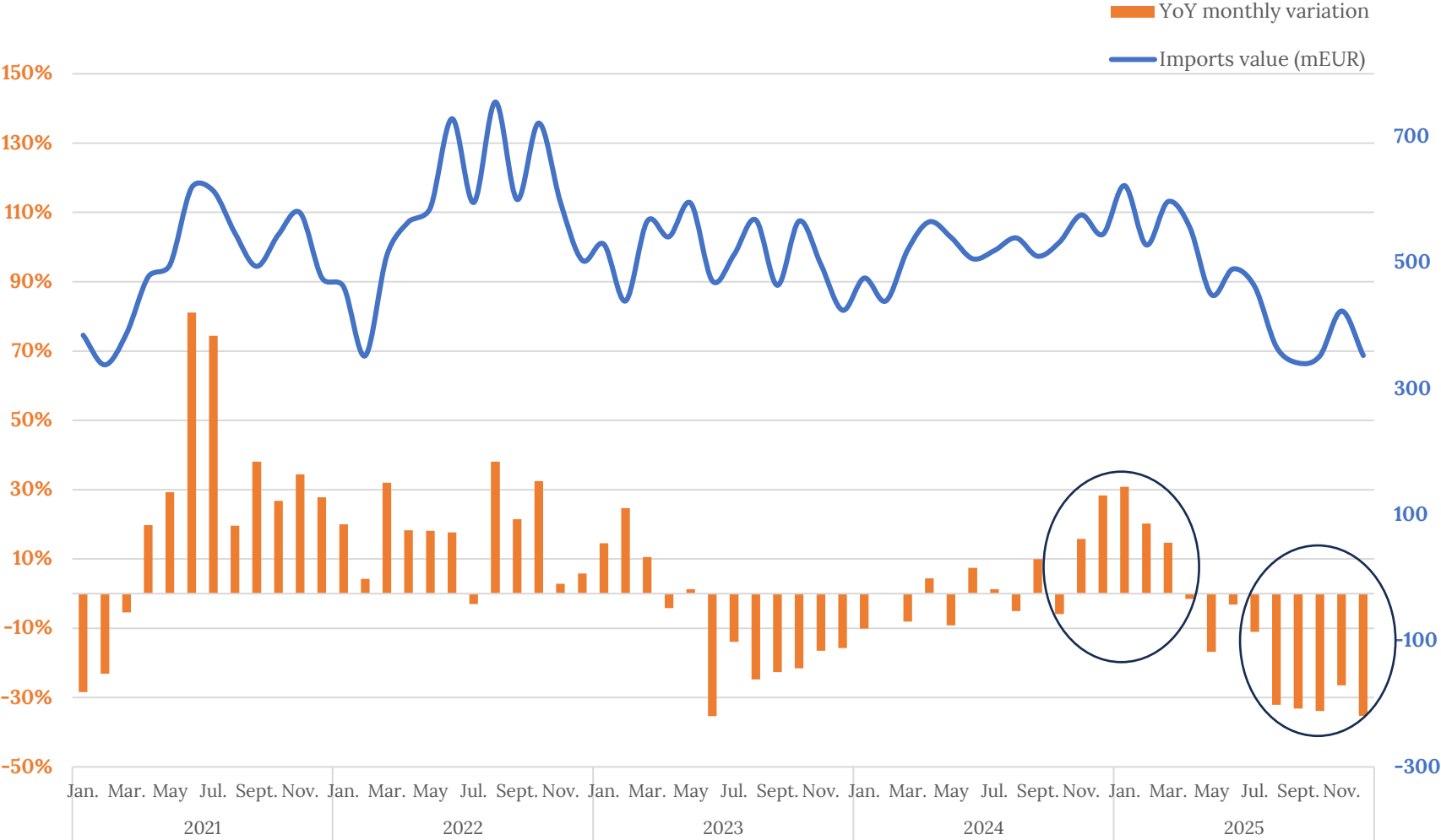
# USA Wine Import Value (EUR)

## Major U.S. Wine Import Shocks

- 1) Global Financial Crisis (2007-09): -15%
- 2) 2025 Tariffs: -12%
- 3) High Inflation (2023): -12%
- 4) Covid-19 Pandemic (2020): -11%



# USA Wine Import Value



Nov 24 – Mar 25  
**Phase 1**  
*Tariff Anticipation*

Apr 25 – Dec 25  
**Phase 2**  
*Imports Drop*



# USA Wine Import Value by Category 2020-2025

## 2025 vs 2024

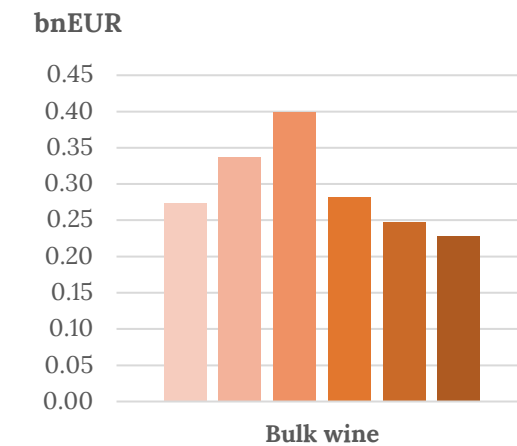
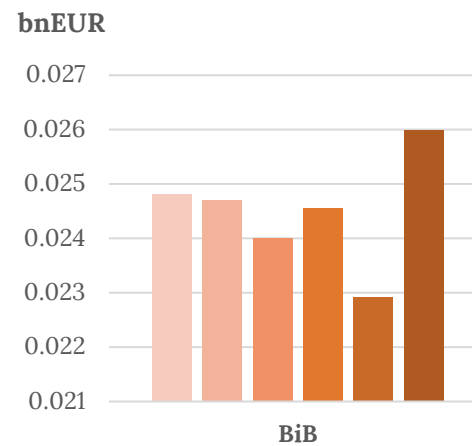
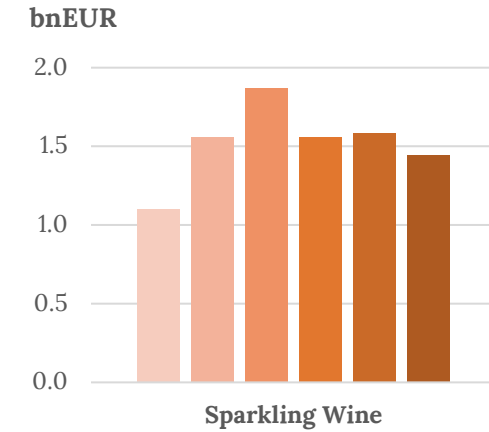
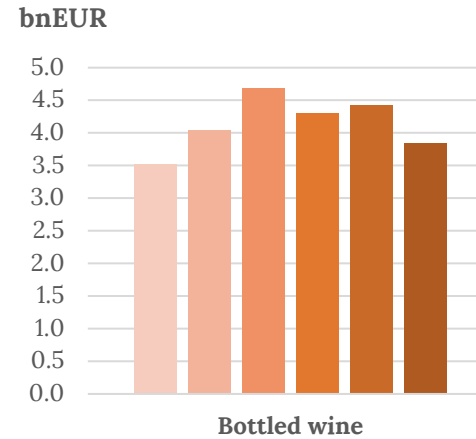
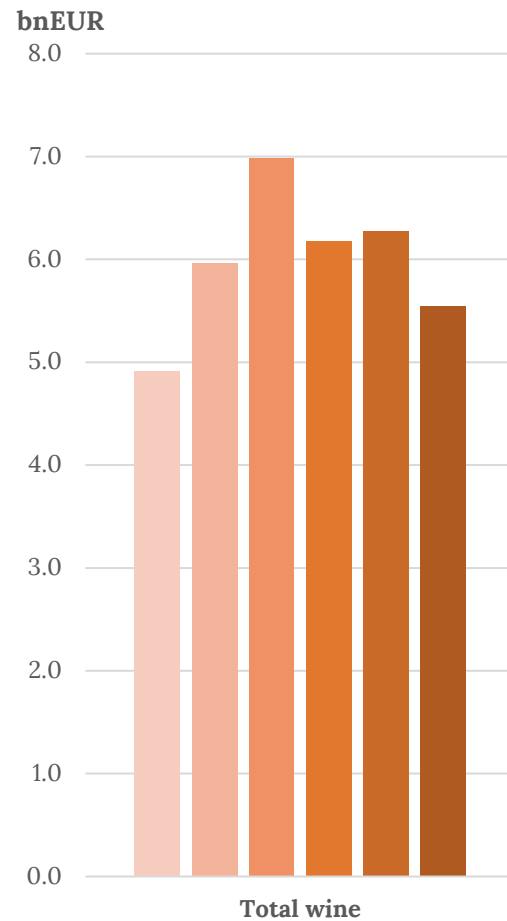
Total wine **-11.6%**

Bottled wine **-13.0%**

Sparkling wine **-8.8%**

Bulk wine **-7.6%**

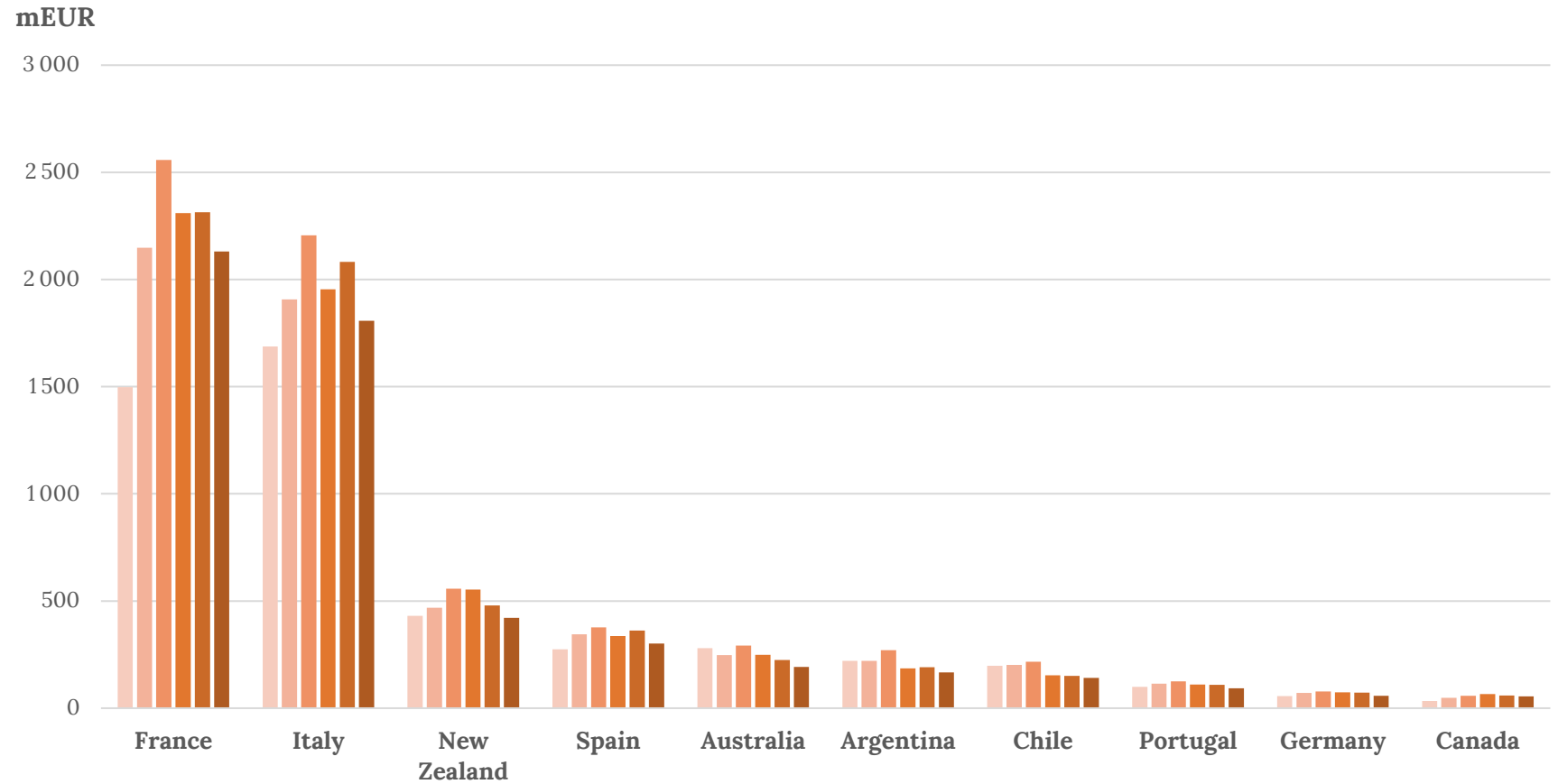
BiB **+13.3%**



# USA Wine Import Value – Top suppliers 2020-2025

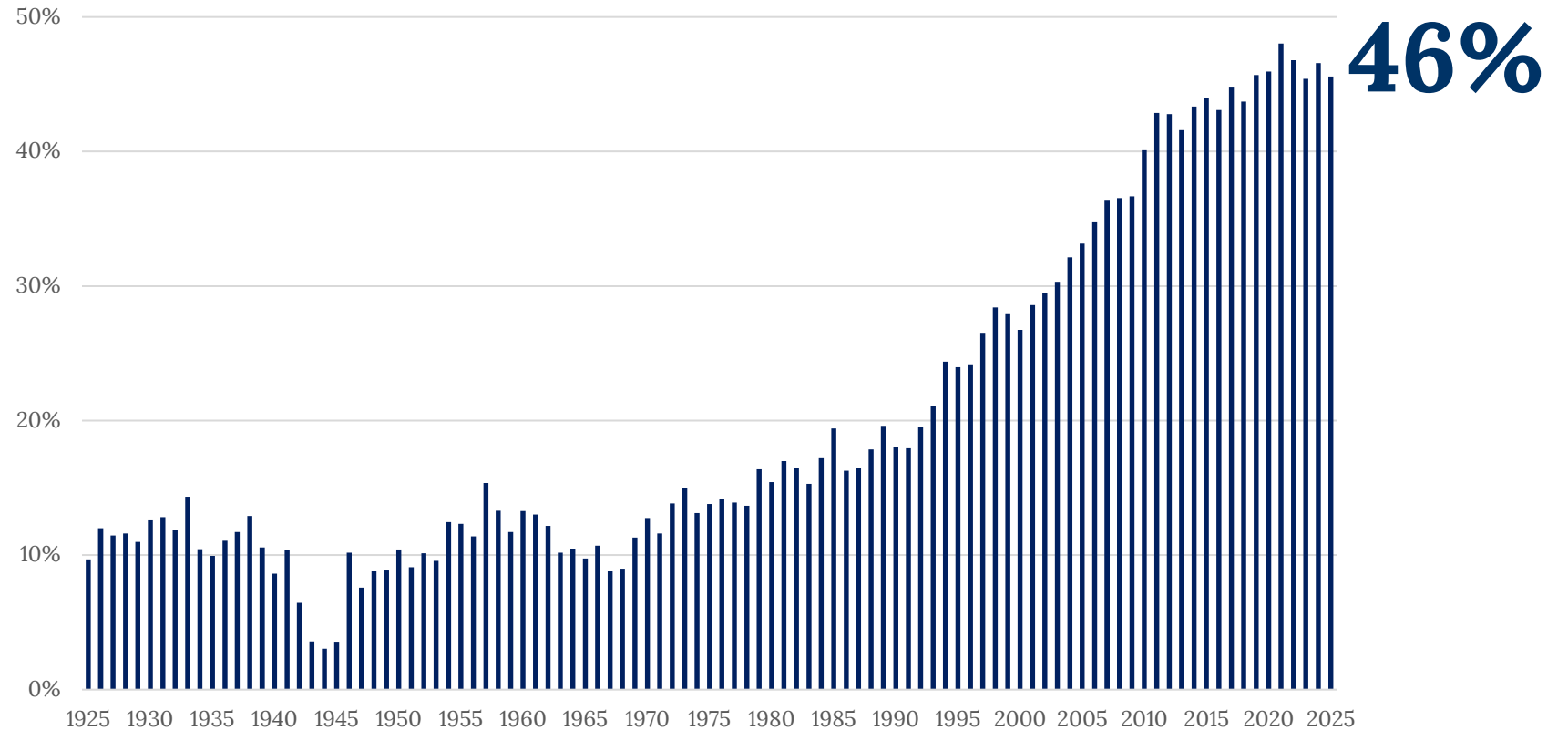
## 2025 vs 2024

FRA	-7.9%
ITA	-13.2%
NZL	-12.0%
ESP	-16.5%
AUS	-14.5%
ARG	-12.6%
CHL	-6.8%
PRT	-15.2%
DEU	-19.3%
CAN	-6.0%



# Market Internationalisation Index

the percentage of wine consumption that comes from imports



+ 30% pts since 1990



46% of wine consumed is imported



Highly globalised sector



INTERNATIONAL ORGANISATION  
OF VINE AND WINE

# STATE OF THE WORLD VINE AND WINE SECTOR

John Barker, OIV Director General  
12 May 2026

*OIV*