

State of the World Wine Sector in 2025



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The year 2025 in a nutshell 6

1 | Vineyard Surface Area 7

- 1.1 • World vineyard 7
- 1.2 • Major vine-growing countries 8

2 | Wine Production 10

- 2.1 • World wine production 10
- 2.2 • Major wine-producing countries in the Northern Hemisphere 10
- 2.3 • Major wine-producing countries in the Southern Hemisphere 12

3 | Wine Consumption 14

- 3.1 • World wine consumption 14
- 3.2 • Major wine-consuming countries 14

4 | International Trade in Wine 17

- 4.1 • World trade volume and value 17
- 4.2 • World trade by product type 18
- 4.3 • Major wine exporters 19
- 4.4 • Major wine importers 22



List of figures

- Figure 1 • Evolution of world vineyard surface area 7
- Figure 2 • Evolution of world wine production (juices and musts excluded) 10
- Figure 3 • Evolution of world wine consumption 14
- Figure 4 • Evolution of international trade in wine by volume 17
- Figure 5 • Evolution of international trade in wine by value 17
- Figure 6 • Evolution of the average price of world wine exports 18

List of tables

- Table 1 • Vineyard surface area of major vine-growing countries 9
- Table 2 • Wine production (juices and musts excluded) in major countries 13
- Table 3 • Wine consumption in major countries 16
- Table 4 • Breakdown of international trade in wine by product type 18
- Table 5 • Major wine exporters 21
- Table 6 • Major wine importers 24

Abbreviations

- ha:** hectares
- kha:** thousands of hectares
- mha:** millions of hectares
- l:** litres
- khl:** thousands of hectolitres
- mhl:** millions of hectolitres
- m:** million
- bn:** billion
- EUR:** euros
- Avg.:** average
- Prov.:** provisional
- Prel.:** preliminary



The year 2025 in a nutshell

In 2025, the global vine and wine sector continued to adapt to a combination of climatic variability, softer demand and rising trade uncertainty. Across production, consumption and trade, volumes remained under pressure, but overall market balances stayed broadly contained, supported by lower output, gradual stock adjustment and the high level of internationalisation of wine markets.

Key Highlights

- **Vineyard Surface Area:** The global vineyard surface area declined by 0.8% in 2025 to 7.0 million hectares, marking the sixth consecutive year of contraction. This confirms an ongoing adjustment in the global vineyard, driven by uprooting across several major vine-growing countries in both hemispheres. The decline affected all grape types but was particularly pronounced for wine grapes.
- **Wine Production:** Global wine production is estimated at 227 mhl in 2025, only 0.6% above the historically low level of 2024. This marks the third consecutive year of low global output, reflecting the combined effect of climatic volatility and production adjustments linked to softer demand conditions. In the current market context, however, below-average production is expected to support a gradual easing of stock pressure rather than create widespread supply shortages.
- **Wine Consumption:** World wine consumption is estimated at 208 mhl in 2025, down 2.7% compared with 2024. This evolution reflects the interaction of long-term structural shifts in mature markets, changing consumer behaviour and recent economic pressures on purchasing power. With nine of the world's top ten wine markets recording lower volumes, demand-side adjustment remains one of the main challenges for the sector, although some markets continued to show resilience.
- **International Trade in Wine:** Global trade in 2025 was shaped above all by heightened trade uncertainty associated with US tariff measures, together with weaker demand in several major import markets. World wine exports declined to 94.8 mhl (-4.7%), while export value fell to 33.8 bn EUR (-6.7%), reflecting both lower traded volumes and moderate price adjustment. Nevertheless, the level of internationalisation remained historically high, with nearly one bottle in two consumed outside its country of origin, confirming the structural role of international trade in the wine sector.



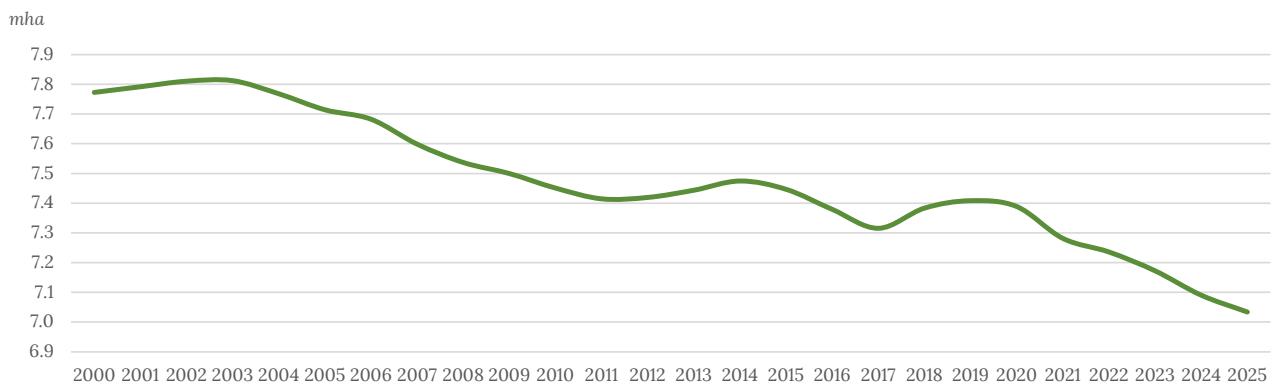
1 | Vineyard surface area

1.1 • World vineyard

In 2025, the world's vineyard surface area¹ stands at 7.0 million hectares, marking a slight decrease of 0.8% compared to 2024. This confirms the continuation of a gradual reduction in global vineyard surface area, observed since 2020.

This trend reflects a reduction in vineyard surface area across major vine-growing countries in both hemispheres, with only a few exceptions. The reduction was visible across grape types, with wine grapes particularly affected.

Figure 1 • Evolution of world vineyard surface area



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¹The vineyard surface area refers to the planted area with vines for all purposes (wine grape, table grape, and grape to be dried), including young vines that are not yet productive.



1.2 • Major vine-growing countries

The **European Union's (EU)** vineyard area declined by 1.6% in 2025, reaching a total of **3.2 mha**, accounting for 45% of the world total. This decrease was primarily driven by significant vineyard removals in France and, to a lesser extent, Spain, while vineyard areas in the other major producing countries remained broadly stable.

At the country level, **Spain**, the largest vineyard in the world, accounts for **919 kha** in 2025 and decreased by 1.3% (equivalent to 12 kha) compared to 2024. Similarly, **France**, which hosts the second-largest vineyard area in the EU, recorded a decline for the third consecutive year. In 2025, the adjustment accelerated, with vineyard area decreasing by 4.4% compared with 2024 - equivalent to a reduction of around 34 kha - bringing the total surface under vines to **740 kha**.

Italy, after a significant expansion of its vineyard area recorded in 2024, saw a slight contraction of 0.3% in 2025, bringing the total vineyard surface to **726 kha**.

Other large EU vineyards remained broadly stable compared with 2024, showing only very minor downward adjustments. This was the case of **Romania (187 kha)**, **Portugal (171 kha)**, **Germany (102 kha)**, **Greece (93 kha)**, **Bulgaria (58 kha)**, and **Hungary (58 kha)**.

In Eastern Europe, **Russia** and **Moldova** remain the countries with the largest vineyards, both with an estimated surface area of **110 kha**. However, their recent trends diverge markedly. Moldova's vineyard area continues to contract, reflecting an ongoing process of sector restructuring, while Russia has recorded sustained growth, having strongly promoted the development of its wine sector over the past decade.

In Asia, after a period of expansion from 2000 to 2015 (from 300 kha to 770 kha), the vineyard in **China**², third in the world by size, has stabilised in recent years and is estimated at **733 kha** in 2025. **Türkiye** hosts the sixth largest vineyard area in the world in 2025, with an estimated **395 kha** of vineyards, primarily dedicated to table and dried grape production. The country continues to experience a long-term decline in vineyard area that began in the 1980s, when the vineyard surface was roughly twice its current size.

By contrast, **India's** vineyard area has been expanding in recent years, with an average annual growth rate of 4.6% since 2019. In 2025, the total area under vines is estimated to reach **197 kha**, making the Indian vineyard the 7th largest in the world. Other large vineyards in Asia, mainly specialised in the production of table grapes and dried grapes, are in **Iran (128 kha)**, **Uzbekistan (125 kha)** and **Afghanistan (104 kha)**.

In North America, the **USA**, the fifth largest vineyard in the world, is estimated at **415 kha** (-0.9%/2024). This marks the seventh consecutive year of decline in vineyard area, largely driven by the ongoing uprooting of wine grapes in California.

In South America, **Argentina's** vineyard area continues the downward trend started in 2015 and decreased by 1.9% in 2025, reaching **196 kha**. Similarly, **Chile** continues the downward trend that began in 2020, with vineyard area declining by a further 3.7% in 2025 to reach **154 kha**. Since 2019, the Chilean vineyard has contracted by 27%. **Brazil**, by contrast, significantly expanded its vineyard for the fifth consecutive year, reaching **91 kha** (+9.6%/2024).

The largest vineyard area in Africa is located in **South Africa**. After several consecutive years of decline—partly reflecting the lasting impact of the drought episodes between 2015 and 2017—the vineyard surface is estimated at **109 kha** in 2025. For the first time since 2020, it has remained broadly stable, with only a marginal decrease of 0.1% compared to 2024. Other major vineyards in Africa are in **Egypt (86 kha)** and **Algeria (68 kha)**.

Australia's vineyard is estimated at **159 kha**, broadly in line with the average observed in recent years.

²For statistical purposes, the data for China do not include those for the Hong Kong Special Administrative Region (Hong Kong SAR), Macao Special Administrative Region (Macao SAR) and Taiwan Province of China.


Table 1 • Vineyard surface area of major vine-growing countries³

<i>kha</i>	2020	2021	2022	2023	2024	2025	25/24	2025
					Prov.	Prel.	% var.	% world
Spain	961	963	955	945	930	919	-1.3%	13.1%
France	799	795	796	788	775	740	-4.4%	10.5%
China	766	754	758	748	733	733	0.0%	10.4%
Italy	719	722	721	720	728	726	-0.3%	10.3%
USA	446	437	435	432	419	415	-0.9%	5.9%
Türkiye	431	419	413	406	400	395	-1.3%	5.6%
India	161	167	175	182	193	197	2.1%	2.8%
Argentina	215	211	207	205	200	196	-1.9%	2.8%
Romania	190	189	188	187	187	187	-0.1%	2.7%
Portugal	195	194	193	182	173	171	-0.9%	2.4%
Australia	159	159	159	159	159	159	0.0%	2.3%
Chile	207	182	181	174	159	154	-3.7%	2.2%
Iran	155	136	119	128	128	128	0.0%	1.8%
Uzbekistan	114	118	122	121	124	125	0.7%	1.8%
Russia	97	99	101	105	110	110	0.0%	1.6%
Moldova	140	138	122	115	110	110	0.0%	1.6%
South Africa	119	117	114	111	109	109	-0.1%	1.5%
Afghanistan	100	100	100	100	104	104	0.0%	1.5%
Germany	103	103	103	104	103	102	-1.3%	1.4%
Greece	112	96	93	92	93	93	0.0%	1.3%
Brazil	80	81	81	81	83	91	9.6%	1.3%
Egypt	85	83	84	84	86	86	0.0%	1.2%
Algeria	75	68	67	69	68	68	0.0%	1.0%
Bulgaria	62	62	62	62	58	58	0.0%	0.8%
Hungary	64	63	62	61	60	58	-3.4%	0.8%
Other countries	835	825	823	811	798	799	0.1%	11.4%
World total	7388	7281	7236	7172	7090	7034	-0.8%	100%

Figure in Italics: OIV estimate
Sources: OIV, FAO, National Statistical Offices

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³Countries with a vineyard surface area equal to or above 50 kha in 2025.



2 | Wine production

2.1 • World wine production

In 2025, global wine production⁴, excluding juices and musts, is estimated at 227 mhl, marking a 0.6% increase compared to the historically low output of 2024. This marks the third consecutive year of low production, standing 9.4% below the five-year average.

Severe weather events remained one of the main factors shaping global wine production. As in 2023 and 2024, early frosts, excessive rainfall and prolonged drought affected vineyard productivity across many major wine-producing regions in both the Northern and Southern Hemispheres. Climatic variability continued to generate uneven impacts across and within regions, leaving output in several key producing countries below recent averages. In some areas, lower volumes may also reflect more cautious production strategies in response to softer market conditions. In the current market context, below-average production is expected to contribute to a gradual easing of stock pressure rather than generate widespread supply shortages.

2.2 • Major wine-producing countries in the Northern Hemisphere

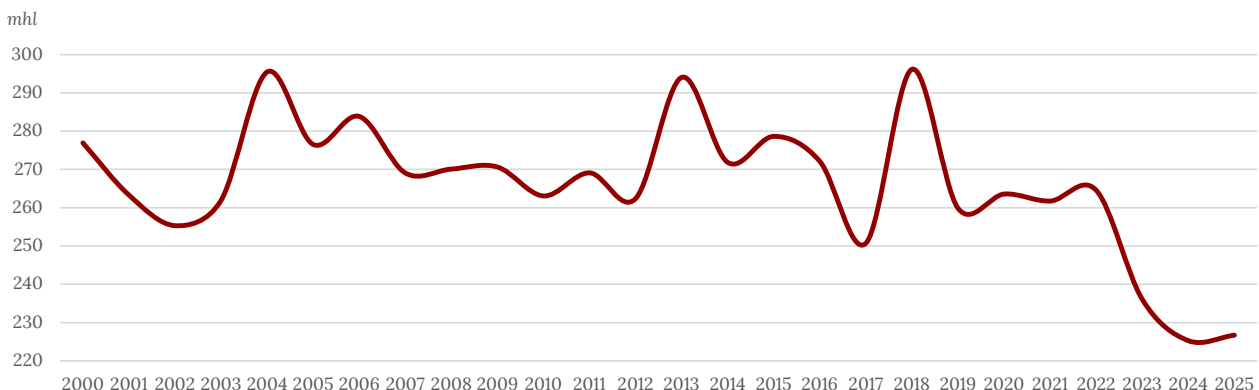
Wine production in the **European Union** in 2025 is estimated at **136 mhl**, which marks a decrease of 1.3% compared to 2024. At around 60% of world wine

production, the EU remains the dominant producing region globally, although this represents one of the lowest volumes recorded in recent decades.

The 2025 data highlight the growing impact of climatic variability on EU wine regions, with vineyards facing a wide range of weather-related disruptions. While some areas experienced severe drought, hydric stress and heat episodes, others were affected by excessive rainfall, localised storms and other destructive weather events, higher disease pressure, damaging vineyards and complicating grape cultivation. These effects were highly uneven across regions: some recorded reduced yields due to adverse conditions, while others benefited from more favourable weather and achieved near-average harvest volumes. Overall, these contrasting outcomes illustrate the increasing year-to-year variability in production levels across EU wine-producing countries.

Italy, the largest wine-producing nation globally, is one of the few major producers to record a 2025 production level close to its recent average, with an estimated **44.4 mhl**, broadly in line with 2024 (+0.7%). However, this volume remains 4.1% below the five-year average. Overall weather conditions were relatively favourable, characterised by a mild spring, balanced rainfall and a summer that was not excessively hot. Production developments, however, were geographically uneven. Output growth was driven primarily by southern regions and moderate increases in the north, while central Italy recorded a slight decline, largely reflecting lower volumes in Tuscany. In addition, in several denominations, yields were voluntarily limited in order to manage elevated stock levels⁵.

Figure 2 • Evolution of world wine production (juices and musts excluded)



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⁴ Production volume resulting from wine grapes harvested in the first semester of 2025 in the Southern Hemisphere and in the second semester of 2025 in the Northern Hemisphere.

⁵ According to Unione Italiana Vini (UIV), wine stocks in Italy reached 61 mhl in January 2026 (+6% / January 2025); this figure rises to nearly 68 mhl (+7.5%) when including musts.



France, the world's second-largest wine producer, produced **36.1 mhl** in 2025, broadly in line with the already low volume recorded in 2024. This volume is 16% below its five-year average. The low level in French wine production for 2025 is mainly attributable to adverse weather conditions across the country from flowering to harvest, impacting all wine regions. In particular, the heatwave and drought in August curtailed production potential by accelerating grape ripening while stunting their growth. In addition to these climatic impacts, recent grubbing-up campaigns have also reduced vineyard areas, further lowering national production levels.

Spain maintains its position as the third largest wine producer globally, with a 2025 production volume of **28.7 mhl**. This figure represents a decrease of 2.4 mhl (-7.7%) compared to 2024, and it remains 17% below the five-year average. A third consecutive year of drought and heatwaves led to a marked contraction in yields, resulting in one of the lowest harvest levels observed in recent decades. The decline was primarily driven by Castilla-La Mancha, which alone recorded a reduction of 1.9 mhl (-11% compared to 2024). More broadly, all major producing regions (with the exception of Catalonia) performed below their 2024 levels.

Among the other major EU countries, **Germany**, at **7.6 mhl** (-2.6%/2024), recorded a production volume below its recent average. This development was largely linked to hot and dry conditions during the growing season, which constrained yield potential, followed by heavy rainfall during the harvest period that further affected volumes.

In **Portugal** (**6.0 mhl**, -14.0%/2024), climate volatility defined the season, as swings from record rainfall to intense heat fuelled disease outbreaks and drought stress, reducing yields and amplifying pressure on producers. This resulted in the lowest production volume since 2011 (5.6 mhl).

In **Romania** (**3.3 mhl**, +3.7%/2024), 2025 wine production remains relatively low, standing 17.6% below the five-year average. The harvest was shaped by variable weather conditions, including late spring frosts and hailstorms, alongside uneven water availability across regions. While some areas benefited from improved rainfall during the growing season, others - particularly in the west - remained affected by persistent drought and extreme weather events.

Hungary (**3.0 mhl**, +10.0%/2024) reports a slightly above-average volume, supported by generally dry summer conditions that contributed to a healthy crop; however, outcomes were regionally heterogeneous, with drought weighing on yields in eastern areas, while western regions recorded average to above-average performance.

Austria recorded a relatively high wine production of **2.5 mhl** in 2025 (+17.5% compared to 2024). Favourable weather conditions throughout the growing season—including regular development phases and a balanced alternation of warm and wet periods—supported yield recovery, while warm days and cool nights in late summer further enhanced grape development. As a result, production reached its highest level since 2018.

After two very small vintages in 2023 and 2024, **Greece** (**1.6 mhl**, +16.8%/2024) recorded a partial recovery in production, supported by generally favourable weather conditions characterised by mild temperatures, marked diurnal variation, and limited extreme events. Nevertheless, output remained well below historical levels, which typically ranged between 2 and 4 mhl.

Concerning neighbouring countries outside the EU, **Russia** (**5.7 mhl**, +11.5%/2024) reported a 2025 production volume that is 22.5% above its last five-year average. Changes in the trade and policy environment have coincided with a reduction in foreign supply and a stronger role for domestic production. In parallel, support measures for the wine sector have contributed to its development in recent years.

Wine production in **Georgia** is estimated at **2.6 mhl** in 2025, the largest volume recorded in the past 30 years. This level is 5.0% higher than the already historically abundant 2024 harvest and 25.1% above the five-year average. The record-high output reflects a combination of favourable weather conditions and the continued expansion of the Georgian wine sector in recent years, largely driven by export demand.

Moldova's wine production in 2025 (**1.8 mhl**, +53.1%/2024) is the highest volume recorded since 2018. Favourable spring weather, including abundant rainfall, improved soil moisture and supported healthy grapevine development, contrasting sharply with 2024's water deficits and late frosts.

In Asia, **China** remains one of the region's largest wine producers, with production in 2025 estimated at **2.2 mhl**, representing a decline of 17.8% compared with the previous year. After reaching its peak in 2012 - when it ranked as the world's fifth-largest wine producer - China's output has steadily contracted, and the country now ranks 18th globally. This downward trend reflects weak domestic demand and broader structural adjustments within the sector, including a shift towards more premium positioning and a narrower consumer base.



In the **USA**, the world's fourth-largest wine producer, 2025 wine production is estimated at **20.0 mhl**, 5.3% below 2024 and 16.2% below the five-year average. This development appears closely linked to softer demand, which has put pressure on prices and margins and contributed to more cautious production strategies, particularly in California.

2.3 • Major wine-producing countries in the Southern Hemisphere

Southern Hemisphere wine production points to a slight recovery in 2025. After two very low vintages, total output in 2025 is expected to rise to around **49 mhl**, a 7.7% increase compared with 2024, though still about 4.6% below the five-year average. Performances across countries appear uneven, with some showing signs of recovery and others still facing reduced yields. In 2025, the Southern Hemisphere accounts for around 22% of global wine output, a share slightly above the past decade's average.

In Oceania, **Australia's** wine production is estimated at **11.3 mhl** in 2025, representing an 8.8% increase from 2024 but remaining 3.7% below the five-year average. This volume positions Australia as the largest wine producer in the Southern Hemisphere in 2025. **New Zealand's** production is estimated at **3.7 mhl** in 2025, marking a notable 31.5% increase compared with the frost-affected 2024 vintage and standing 15.2% above the five-year average. Overall, the growing season was characterised by favourable climatic conditions that supported grape development and resulted in the second-largest harvest in New Zealand's history.

In South America, **Argentina** has produced **10.8 mhl**, a volume broadly in line with both 2024 (-1%) and its five-year average, consolidating its position as the region's largest wine producer. **Chile**, with a production of **8.4 mhl**, recorded a -9.9% decrease compared with 2024 and stands 25.9% below the five-year average. This marks the fourth consecutive year of declining production, bringing output to its lowest level since 2007. The decrease was largely driven by persistent water scarcity and increasing climatic variability. In addition, softer international demand in recent years has contributed to a more cautious production environment. Conversely, **Brazil's** 2025 wine production amounted to **2.8 mhl**, with an 80.6% increase from the historically low level recorded in 2024 and 15.8% above the five-year average. The rebound reflects favourable climatic conditions, with a rainy winter followed by a dry and sunny spring and summer that supported high yields in the main wine regions.

South Africa's 2025 wine production volume is **10.2 mhl**, marking a 16.2% increase from 2024 and 2.8% above the five-year average. The 2025 harvest marks a full recovery from the previous two low vintages, thanks to mild, mostly dry weather across most winegrowing regions. These conditions supported healthy vine development, improved yields, and favourable ripening in both coastal and inland areas, with low disease pressure further supporting production.


Table 2 • Wine production (juices and musts excluded) in major countries⁶

<i>mhl</i>	2020	2021	2022	2023	2024	2025	25/24	25/5y avg.	2025
					Prov.	Prel.	% Var.	% Var.	% world
Italy	49.1	50.2	49.8	38.3	44.1	44.4	0.7%	-4.1%	19.7%
France	46.7	37.6	46.0	47.2	36.1	36.1	-0.1%	-15.5%	16.0%
Spain	40.9	35.5	36.0	28.4	31.1	28.7	-7.7%	-16.6%	12.7%
USA	23.9	25.3	23.5	25.5	21.1	20.0	-5.3%	-16.2%	8.9%
Australia	10.9	14.8	13.1	9.6	10.4	11.3	8.8%	-3.7%	5.0%
Argentina	10.8	12.5	11.5	8.8	10.9	10.8	-0.9%	-1.0%	4.8%
South Africa	10.4	10.8	10.3	9.3	8.8	10.2	16.2%	2.8%	4.5%
Chile	10.3	13.4	12.4	11.0	9.3	8.4	-9.9%	-25.9%	3.7%
Germany	8.4	8.4	8.9	8.6	7.8	7.6	-2.6%	-10.4%	3.4%
Portugal	6.4	7.4	6.8	7.5	6.9	6.0	-14.0%	-15.1%	2.6%
Russia	4.4	4.3	5.0	4.5	5.1	5.7	11.5%	22.5%	2.5%
New Zealand	3.3	2.7	3.8	3.6	2.8	3.7	31.5%	15.2%	1.7%
Romania	3.8	4.5	3.8	4.6	3.1	3.3	3.7%	-17.6%	1.4%
Hungary	3.0	3.1	2.9	2.9	2.7	3.0	10.0%	1.1%	1.3%
Brazil	2.3	2.9	3.2	2.3	1.6	2.8	80.6%	15.8%	1.3%
Georgia	2.1	1.9	1.9	1.9	2.4	2.6	5.0%	25.1%	1.1%
Austria	2.4	2.5	2.5	2.4	2.2	2.5	17.5%	6.4%	1.1%
China	6.6	5.9	4.7	3.2	2.6	2.2	-17.8%	-53.1%	1.0%
Moldova	0.9	1.4	1.4	1.8	1.2	1.8	53.1%	33.3%	0.8%
Greece	2.2	2.4	2.1	1.4	1.4	1.6	16.8%	-14.6%	0.7%
Other countries	14.7	14.2	14.7	13.4	13.7	14.2	3.7%	0.4%	6.3%
World Total	264	262	265	236	225	227	0.6%	-9.4%	100.0%

Figure in italic: estimate OIV
Sources: OIV, EC DG AGRI, FAO, National Statistical Offices, Specialised Press

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⁶ Countries with a wine production equal to or above 1 mhl in 2025.



3 | Wine consumption

3.1 • World wine consumption

World wine consumption in 2025 is estimated at 208 mhl, marking a decrease of 2.7% compared to 2024. This decline has followed a relatively steady trajectory since 2018, with global volumes falling by 14% over this period.

This evolution reflects the interaction between longer-term changes in consumption patterns and a more difficult economic environment in recent years. In several mature wine markets, evolving lifestyle preferences, shifting social habits and generational changes continue to influence consumer behaviour. At the same time, the sector has faced a succession of external pressures since 2020, including the Covid-19 pandemic, geopolitical tensions, trade disruptions and inflationary pressures, all of which have weighed on purchasing power and consumer confidence.

At the country level, three major markets have played a particularly important role in driving the global decline. China has recorded the largest contraction, losing on average around 2 mhl per year since 2018; France continues a long-term downward trend that began several decades ago; and the USA has recently experienced a marked slowdown in consumption. Together, these three markets account for a substantial share of the reduction observed in global wine consumption in the last years.

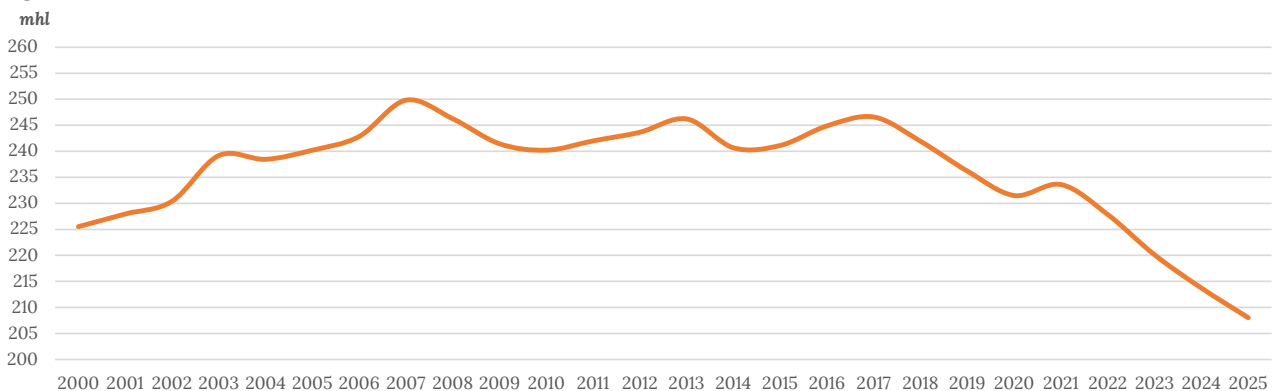
Against this backdrop, 2025 confirmed the generally softer consumption environment observed across many markets. High average prices – linked in part to relatively low production volumes and the lingering effects of inflation – continued to weigh on demand in several countries. Nine of the world's ten largest wine markets recorded lower consumption volumes compared with 2024. Nevertheless, some markets, including Portugal, Brazil and Japan, continued to show relative resilience.

3.2 • Major wine-consuming countries⁷

In 2025, the **EU** represented a wine market of **100.6 mhl**, accounting for 48% of the world's consumption. This figure reflects a decrease of 3.1% compared to the previous year and a decline of 6.9% compared to the five-year average. This decline is attributed to an overall reduction in wine consumption observed in some of the major traditional wine-consuming countries.

Within the EU, France, Italy, and Germany are by far the largest wine markets. **France** maintains its position as the largest European consuming country in 2025, with an estimated consumption of **22.0 mhl**, marking a 3.2% decrease from 2024 and 7.2% below the five-year average. **Italy**, the second-largest wine market in the EU and the third globally, recorded a marked decline (-9.4%) in consumption in 2025, reaching **20.2 mhl**, back to pre-covid levels. **Germany**, the third-largest EU market, has an estimated consumption volume of **17.8 mhl** in 2025, which represents a decline of 4.3% over 2024.

Figure 3 • Evolution of world wine consumption



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⁷The estimates of national wine consumption levels presented in this chapter warrant careful interpretation. This is due to the inherent limitations of the “apparent consumption” methodology. Apparent consumption is defined as production plus imports minus exports, with adjustments for changes in inventories. This method is particularly limited in countries where comprehensive data on stock variations are not available. As a result, it may not fully account for destocking and stock management processes of importers and distributors, as well as losses or industrial uses of wine.



Spain also recorded lower consumption, estimated at 9.4 mhl, 5.2% below 2024. By contrast, **Portugal** shows a markedly different trajectory. With **5.6 mhl** consumed in 2025, the country reached a record-high level, up 5.6% compared with 2024 and 7.4% above the five-year average. This represents the highest consumption volume ever recorded, confirming Portugal as one of the few large EU wine markets where domestic consumption continues to display a positive trend. Similarly, **Romania**, at **3.5 mhl**, records an 11.0% increase in wine consumption compared to 2024, and remains 14.3% above the five-year average.

The **Netherlands**, at **2.9 mhl**, recorded a notable decline, with consumption falling by 12.7% compared with 2024. This estimated consumption volume is 18.1% below its last five-year average. **Austria**, at **2.4 mhl** (+6.0% vs 2024), continues to display a remarkably stable consumption pattern, with domestic demand consistently fluctuating within a narrow range of 2.2–2.4 mhl since 2015.

Outside the EU, the **United Kingdom (UK)**, ranked fifth globally, saw a 2.4% decrease in wine consumption in 2025, estimated at **12.3 mhl**. Similarly, **Russia's** wine consumption declined by 5.5%, reaching **8.0 mhl**, a volume in line with the five-year average. In 2025, **Switzerland** continued its long-term downward trend in wine consumption, with volumes estimated at **2.3 mhl** (-3.6%/2024).

In the **USA**, the largest wine market globally, consumption is estimated to decrease by 4.3% in 2025 and to fall to **31.9 mhl**. Despite having been a growing and very resilient market for many years, consumption has recently softened. This recent weakening appears linked to a combination of demographic, behavioural and economic factors, including lower alcohol consumption among younger cohorts, more fragmented beverage preferences and greater sensitivity to price and purchasing-power constraints. For similar reasons, **Canada**, with **2.8 mhl**, witnessed a decline of 3.0% compared to 2024, continuing the downward trend observed in recent years.

Among Asian markets, **China's** wine consumption declined by 13.0% in 2025, totalling **4.8 mhl**, reflecting a continued adjustment in internal demand that started in 2018. This contraction reflects both short-term pressures and deeper structural changes, with wine demand proving highly discretionary and particularly sensitive to income and price developments. At the same time, the market is gradually shifting from protocol- and gift-driven demand toward more fragmented, consumer-led consumption patterns. **Japan**, the second-largest wine market in Asia, recorded an increase of 6.8% from 2024, reaching **3.3 mhl**. This volume is in line with the 5-year average.

In South America, **Argentina's** 2025 consumption decreased for the fifth year in a row, reaching **7.5 mhl** (-2.6% / 2024). By contrast, **Brazil**, the region's second-largest market, is estimated to reach the highest consumption volume in its history at **4.4 mhl**, a strong increase compared to the low level recorded in 2024 (+41.9%). This volume is also significantly above the five-year average (+19.9%).

South Africa remains the largest and most dynamic wine market in Africa in 2025. With an estimated consumption of **4.0 mhl**, the country recorded a contraction of 7.7% compared with 2024, following the peak levels observed during the 2022–2024 period.

In Oceania, **Australia's** wine market, ranked tenth globally, is estimated at **5.3 mhl** (-2.2%/2024).



Table 3 • Wine consumption in major countries⁸

<i>mhl</i>	2020	2021	2022	2023	2024	2025	25/24	2025
					Prov.	Prel.	% Var.	% world
USA	<i>34.1</i>	<i>34.2</i>	<i>35.5</i>	<i>35.4</i>	<i>33.3</i>	<i>31.9</i>	-4.3%	15.3%
France	23.2	24.6	24.4	23.5	22.7	22.0	-3.2%	10.6%
Italy	24.2	24.2	22.4	21.8	22.3	20.2	-9.4%	9.7%
Germany	19.8	19.9	19.4	18.4	18.6	17.8	-4.3%	8.6%
UK	<i>13.7</i>	<i>13.9</i>	<i>13.1</i>	<i>12.8</i>	<i>12.6</i>	<i>12.3</i>	-2.4%	5.9%
Spain	9.2	10.3	9.6	9.8	9.9	9.4	-5.2%	4.5%
Russia	7.7	7.5	7.7	8.3	8.5	8.0	-5.5%	3.8%
Argentina	9.4	8.4	8.3	7.8	7.7	7.5	-2.6%	3.6%
Portugal	4.4	5.3	5.7	5.5	5.3	5.6	5.6%	2.7%
Australia	6.0	5.6	5.4	5.5	5.4	5.3	-2.2%	2.5%
China	<i>12.4</i>	<i>10.5</i>	<i>9.1</i>	<i>6.8</i>	<i>5.5</i>	<i>4.8</i>	-13.0%	2.3%
Brazil	4.1	4.1	3.6	3.5	3.1	4.4	41.9%	2.1%
South Africa	3.0	3.9	4.5	4.4	4.3	4.0	-7.7%	1.9%
Romania	2.6	3.7	2.5	3.4	3.2	3.5	11.0%	1.7%
Japan	<i>3.5</i>	<i>3.4</i>	<i>3.5</i>	<i>3.2</i>	<i>3.1</i>	<i>3.3</i>	6.8%	1.6%
Netherlands	<i>3.6</i>	<i>3.7</i>	<i>3.6</i>	<i>3.5</i>	<i>3.4</i>	<i>2.9</i>	-12.7%	1.4%
Canada	<i>4.5</i>	<i>4.0</i>	<i>3.5</i>	<i>3.1</i>	<i>2.9</i>	<i>2.8</i>	-3.0%	1.4%
Austria	2.3	2.4	2.4	2.3	2.2	2.4	6.0%	1.1%
Switzerland	2.6	2.8	2.6	2.6	2.4	2.3	-3.6%	1.1%
Czechia	2.1	2.2	2.2	2.2	1.9	2.0	5.4%	1.0%
Other countries	39.2	39.0	38.9	36.4	35.4	35.6	0.6%	17.1%
World total	232	234	228	220	214	208	-2.7%	100.0%

Figure in italics: OIV estimates
Sources: OIV, FAO, National Statistical Offices, Specialised Press

⁸ Countries with wine consumption equal to or above 2 mhl in 2025.



4 | International trade in wine

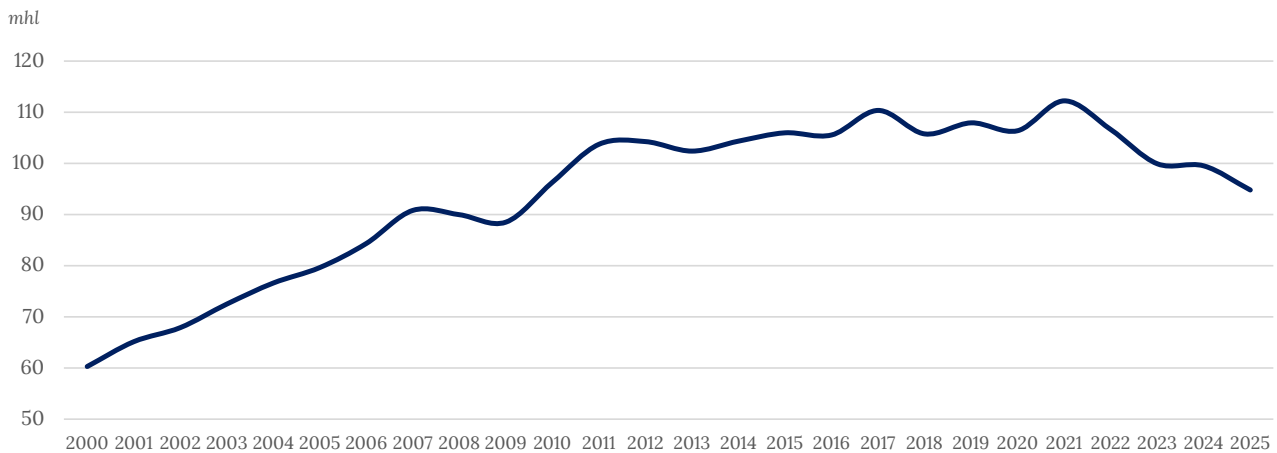
4.1 • World trade volume and value

Global trade in wine in 2025 evolved in a complex international environment shaped by tariff-related uncertainty in the US market, softer demand in several major importing countries and exchange-rate movements, all of which influenced trade flows and values. For some categories, the relatively limited availability resulting from three consecutive years of below-average production also affected export dynamics. Together, these factors contributed to a general slowdown in international wine trade, affecting both volumes and prices.

In this context, **world wine exports** declined by 4.7% in volume to **94.8 mhl**, extending the downward trend observed since 2022. The contraction was broad-based across major exporting countries, with ten of the world's top twelve exporters recording lower volumes. Portugal and New Zealand were the only notable exceptions, posting growth in export volumes in 2025.

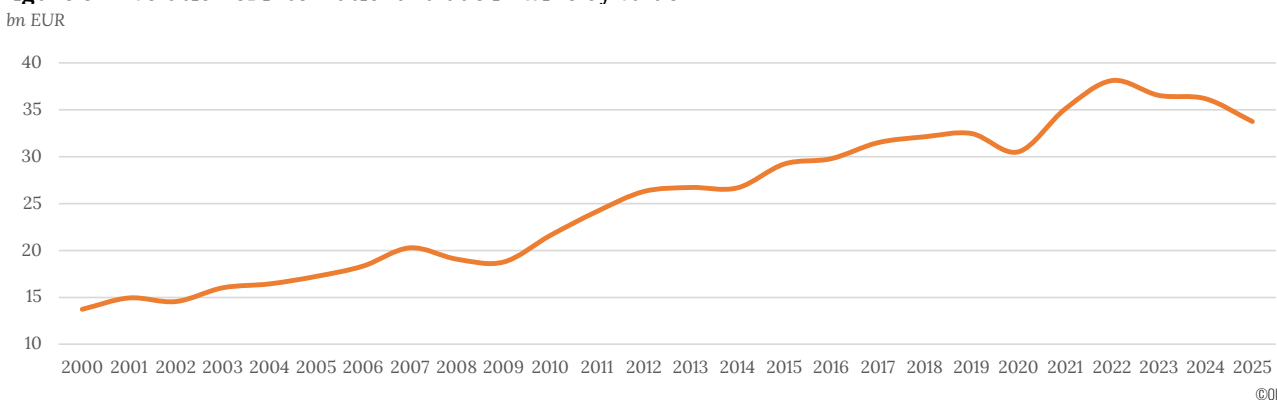
In value terms⁹ global wine exports are estimated at **33.8 bn EUR**, down 6.7% compared to 2024 and 4.4% below the five-year average. The **average export price** declined only slightly (-2.1%) to **3.56 EUR/l**. This price adjustment reflects easing inflationary pressures, but also points to stronger competitive pressures among exporters, as weaker global demand and additional trade barriers increased pressure to defend market shares. Nevertheless, the average export price remained at historically elevated levels in 2025, standing as the third highest level on record and still 24% above the pre-Covid period.

Figure 4 • Evolution of international trade in wine by volume



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Figure 5 • Evolution of international trade in wine by value

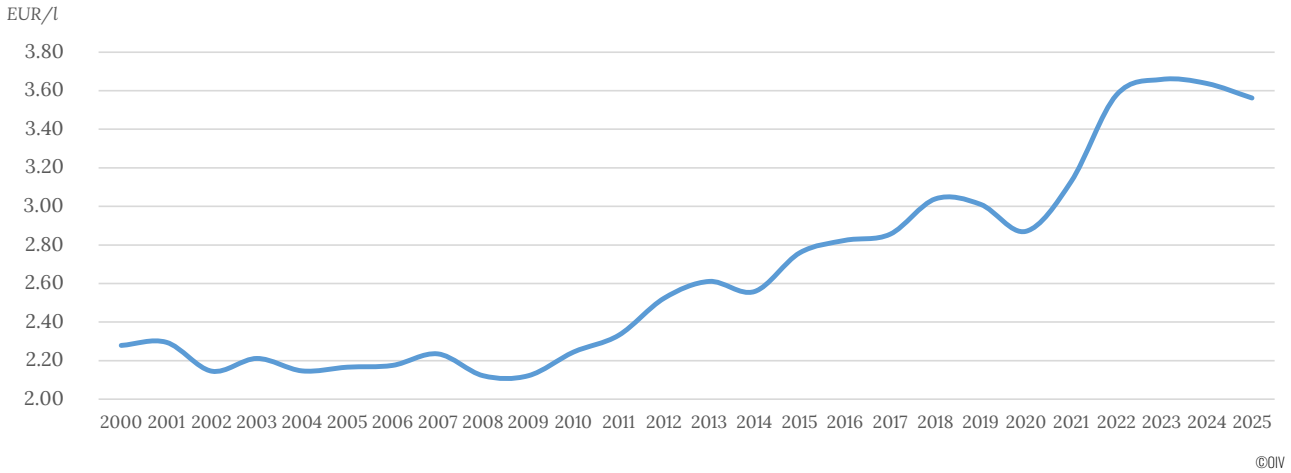


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⁹Trade values are reported in EUR, and therefore also reflect exchange-rate movements. For this reason, part of the decline in EUR-denominated export value should be interpreted alongside currency effects, in addition to changes in volumes, prices and product mix.



Figure 6 • Evolution of the average price of world wine exports



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4.2 • World trade by product type

Bottled wine (< 2 litres) represents 51.1% of trade volumes globally in 2025 and 66.4% of the value. This category has decreased by 5.7% in volume and 8.9% in value over 2024. The average export price observed in 2025 is 4.53 EUR/l (-3.3%/2024). This marks the first decline in price since 2020.

Sparkling wine witnessed a 2.7% decrease in volumes and a 6.1% decline in value. The average export price fell to 7.54 EUR/l, down 3.5% from 2024. In 2025, this category's share in total wine exports slightly increased in volume and value to 11.2% and 24.3% respectively.

Bag-in-Box® (BiB) refers to wines in containers holding more than 2 litres but less than 10 litres. In 2025, BiB represents a share of 3.6% in volume and 2.0% in value of the total world exports. Experiencing a 5.0% decline in volume and 4.8% drop in value compared to 2024, the category maintained its average export price relatively stable at 1.89 EUR/l, in line with 2024 (+0.3%).

Bulk wine (> 10 litres) exports, the second largest category in volume, recorded a 3.8% decline in volume and 5.3% decline in value. Despite representing 34.0% of total world wine volume exports, bulk wine comprised 7.3% of the total value of wine exports in 2025. The category recorded an average export price of 0.75 EUR/l, reflecting a 1.5% fall compared to 2024.

Taken together, product-level developments suggest the decline was broad-based, but not uniform across market segments. Bottled wine accounted for a large share of the overall decrease, while sparkling and other alternative formats showed comparatively greater resilience.

Table 4 • Breakdown of international trade in wine by product type

Volume (mhl)		Value (bn EUR)		Type	Vertical Structure in 2025		Var. 25/24	
2024	2025	2024	2025		volume	value	volume	value
99.5	94.8	36.2	33.8	Bottled (<2 l)	51.1%	66.4%	-5.7%	-8.9%
				Sparkling	11.2%	24.3%	-2.7%	-6.1%
				BiB	3.6%	2.0%	-5.0%	-4.8%
				Bulk (>10 l)	34.0%	7.3%	-3.8%	-5.3%
variation of -4.7%		variation of -6.7%						

Sources: OIV, GTA

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4.3 • Major wine exporters

Among major exporters, export performance was uneven but generally weaker, though with varying intensity across origins and product mixes. Contractions were particularly evident among large European and Southern Hemisphere exporters, while Portugal and New Zealand stood out as notable exceptions. In many cases, lower shipments to key markets such as the USA, the UK and China, amplified the decline.

In 2025, **Italy's** wine exports declined to **21.0 mhl** (-2.0%/2024) in volume and **7.8 bn EUR** (-3.4%/2024) in value. All categories recorded declines in both volume and value. Bottled wine, which accounted for 55% of export volume and 65% of export value, drove the overall contraction, declining by 5.6% in volume and 7.2% in value. Sparkling wine proved comparatively more resilient, with a more limited decline in volume (-1.9%/2024), while bulk wine registered the sharpest fall in volume (-8.2%/2024). This downward trend was also reflected across Italy's main export destinations. Germany remained the leading market by volume, at 4.4 mhl (-9.8%/2024), and the second-largest by value, at 1.0 bn EUR (-6.4%/2024), while the USA retained its position as the top market by value, reaching 1.7 bn EUR (-9.1%/2024), with part of the decline linked to the impact of tariffs in the second half of the year.

Spain's wine exports declined to **19.6 mhl** in 2025 (-2.2%/2024), while export value fell to **3.0 bn EUR** (-3.9%/2024). The decrease was driven primarily by bottled wines, whose export volumes declined by 7.3% compared with 2024, while bulk wine showed relative resilience, recording a 1.2% increase in volume. Germany remained Spain's leading export market by both volume and value, despite declines of 0.1 mhl (-2.8%/2024) and 24 m EUR (-6.6%/2024), respectively. Among destinations, Italy recorded the sharpest decline in volume in absolute terms, down 0.5 mhl (-31.2%/2024), while Russia registered the largest absolute drop in value, falling by 50 m EUR (-71.6%/2024).

France remained the world's leading wine exporter by value and the third largest by volume in 2025, although exports declined to **12.5 mhl** (-2.3%/2024), while export value fell to **11.2 bn EUR** (-3.7%/2024). At category level, all segments recorded declines in value, while sparkling wine was the only category to register a slight increase in volume. Bottled wine drove the contraction, posting the largest declines in both volume (-6.7%) and value (-6.9%). Among destinations, the USA remained France's leading export market, despite declines of 0.1 mhl (-8%/2024) in volume and 0.4 bn EUR (-19%/2024) in value. Beyond the USA, several major destinations registered lower volumes, notably Germany (-182 khl, -10%/2024), China (-138 khl, -32%/2024), Belgium (-137 khl, -11%/2024), and the Netherlands (-125 khl, -12%/2024).

Chile remained the world's fourth-largest wine exporter in 2025, although exports declined to **7.1 mhl** (-9.0%/2024), a level 11.3% below the five-year average, while export value fell to **1.4 bn EUR** (-8.0%/2024). At category level, all segments recorded declines in both volume and value. Bulk wine posted the steepest contraction in volume (-23.4%/2024), while bottled wine drove the decline in value (-8.2%/2024). Bottled wine remained dominant in Chile's export category, accounting for 61% of total export volume and 83% of total export value, underscoring the impact of its contraction on overall export performance. Among destinations, Brazil remained the leading market by value at 183 m EUR (-2.6%/2024), while the UK was the main destination by volume at 0.9 mhl (-13%/2024). China, which had been the second-largest market by volume in 2024, fell sharply to 0.5 mhl (-45%/2024), as imports increasingly shifted back towards Australian wines following the removal of tariffs in March 2024.

After the rebound recorded in 2024, **Australia's** wine exports declined in 2025 to **6.1 mhl** (-5.6%/2024) in volume and **1.3 bn EUR** (-15.4%/2024) in value. At category level, all segments recorded declines in both volume and value, with the exception of bulk wine, whose export volume rose marginally (+0.2%/2024). Bottled wine drove the contraction, falling by 10.4% in volume and 16.7% in value, while continuing to account for 75% of total export value. Among destinations, China remained the leading export market by value at 403 m EUR (-25%/2024), while the UK was the main destination by volume at 2.0 mhl (-6.8%/2024).

Portugal's wine exports increased by 1.1% in volume in 2025, reaching **3.4 mhl**, while export value declined by 1.0% to **1.0 bn EUR**. At category level, all segments recorded growth in export volumes, with bulk wine posting the strongest increase in absolute terms (+3.4%/2024). The slight decline in export value was driven primarily by bottled wine, the dominant category in Portugal's export (89%), whose value declined by 1.8% compared with 2024. Among destinations, Angola remained Portugal's leading export market by volume, reaching 0.4 mhl (+9.7%/2024), while France retained its position as the top destination by value at 0.1 bn EUR (+0.6%/2024).

In 2025, **South Africa's** wine exports declined to **3.2 mhl** (-12.2%/2024) in volume and **0.6 bn EUR** (-7.4%/2024) in value. At category level, all segments recorded declines in value, with bottled wine posting the largest drop in absolute terms, down 6.5% over 2024. In volume terms, most categories increased, but the sharp contraction in bulk wine (-25.7%/2024) more than offset these gains and drove the overall decline.



Among destinations, the UK remained South Africa's leading export market by both volume and value, reaching 0.7 mhl (-11.7%/2024) and 119 m EUR (-8.2%/2024), respectively, mirroring the broader downward trend. The USA, meanwhile, recorded declines of 45 khl (-27.5%/2024) in volume and 9 m EUR (-40.7%/2024) in value, amid heightened trade tensions.

New Zealand's wine exports increased in 2025 to **3.1 mhl** (+17.7%/2024), while export value remained broadly stable at **1.1 bn EUR** (-0.5%/2024). At category level, bulk wine – accounting for 54% of total export volume – recorded the largest decline in value, down 7.2% over 2024, despite volumes increasing by 25.4%. Bottled wine continued to dominate in value terms, representing 70% of total export value, with exports increasing by 9.9% in volume and 2.6% in value. Among destinations, the USA retained its position as New Zealand's leading market by both volume and value, reaching 1.0 mhl (+29.5%/2024) and 0.3 bn EUR (+1.0%/2024), respectively.

Germany recorded a decline in wine exports for the third consecutive year in 2025, with volumes falling to **3.0 mhl** (-7.0%/2024) and export value declining to **1.0 bn EUR** (-4.6%/2024). Bulk wine was the only segment to register growth in volume (+21%/2024), although it accounted for just 4% of total exports. All other categories recorded declines in both volume and value, with bottled wine driving the contraction, down 12.8% and 10.1% respectively over 2024. Among destinations, the Netherlands remained Germany's leading export market by both volume and value, but mirrored the broader downward trend, with exports falling to 0.5 mhl (-33%/2024) and 112 m EUR (-32%/2024).

The **USA's** wine exports declined in 2025 to **2.0 mhl** (-17.9%/2024) in volume and **0.8 bn EUR** (-35.9%/2024) in value. At category level, bottled wine drove the contraction, with exports falling by 39.8% in volume and 42.0% in value. Overall export performance was affected by heightened trade uncertainty and tariff-related tensions, which weighed on market access and altered trade flows. In this context, Canada – the leading export market in 2024 – recorded by far the sharpest decline, with exports falling by 0.4 mhl (-66.9%/2024) and 0.3 bn EUR (-76.9%/2024).

In **Argentina**, wine exports declined in 2025 to **1.9 mhl** (-6.8%/2024) in volume and **0.6 bn EUR** (-10.3%/2024) in value. Bottled wine continued to dominate Argentina's export structure, accounting for 77% of total export volume and 92% of total export value, but also recorded the steepest declines in absolute terms, down 6.7% in volume and 12.4% in value compared with 2024. Among destinations, the USA remained the leading export market by value, while also recording the sharpest decline in absolute terms, with exports falling by 102 khl (-22.5%/2024) and 41 m EUR (-23.0%/2024). The UK retained its position as the main destination by volume, although shipments declined by 16.1%/2024.

Canada's wine exports fell sharply in 2025, reaching **1.6 mhl** (-19.6%/2024) in volume and **68 m EUR** (-9.6%/2024) in value. Bulk wine was the main driver behind the overall decline in exports, with volumes and values falling by 19.5% and 6.6% compared to 2024, respectively. This adjustment is largely linked to trade tensions with the USA, historically Canada's primary export destination, which weighed heavily on shipments in 2025.



Table 5 • Major wine exporters¹⁰

	Volume (mhl)		Value (m EUR)		Type	Vertical Structure in 2024		Variation 2025/2024	
	2024	2025	2024	2025		volume	value	volume	value
Italy	21.4	21.0	8115	7843	bottled (< 2 l)	55%	65%	-5.6%	-7.2%
					sparkling	27%	30%	-1.9%	-5.0%
					BiB	2%	1%	-5.6%	-7.2%
	variation of -2.0%		variation of -3.4%		bulk (>10 l)	16%	4%	-8.2%	-4.9%
Spain	20.0	19.6	3099	2977	bottled (< 2 l)	32%	60%	-7.3%	-6.5%
					sparkling	8%	17%	-10.8%	-7.5%
					BiB	4%	3%	2.3%	1.0%
	variation of -2.2%		variation of -3.9%		bulk (>10 l)	57%	19%	1.2%	5.9%
France	12.8	12.5	11645	11213	bottled (< 2 l)	69%	60%	-6.7%	-6.9%
					sparkling	17%	37%	0.1%	-5.7%
					BiB	4%	1%	-0.5%	-0.6%
	variation of -2.3%		variation of -3.7%		bulk (>10 l)	10%	2%	-1.7%	-2.3%
Chile	7.8	7.1	1492	1372	bottled (< 2 l)	61%	83%	-1.4%	-8.2%
					sparkling	1%	1%	-0.1%	-5.0%
					BiB	2%	2%	-19.9%	-13.9%
	variation of -9.0%		variation of -8.0%		bulk (>10 l)	37%	14%	-23.4%	-20.8%
Australia	6.5	6.1	1591	1346	bottled (< 2 l)	32%	75%	-10.4%	-16.7%
					sparkling	2%	4%	-13.7%	-7.9%
					BiB	2%	1%	-37.1%	-12.3%
	variation of -5.6%		variation of -15.4%		bulk (>10 l)	64%	20%	0.2%	-7.0%
Portugal	3.4	3.4	966	956	bottled (< 2 l)	73%	89%	0.5%	-1.8%
					sparkling	1%	2%	6.6%	4.3%
					BiB	9%	4%	0.1%	2.6%
	variation of 1.1%		variation of -1.0%		bulk (>10 l)	17%	5%	3.4%	7.1%
South Africa	3.6	3.2	600	556	bottled (< 2 l)	44%	69%	4.5%	-6.5%
					sparkling	2%	5%	8.2%	-3.3%
					BiB	7%	5%	4.5%	-4.0%
	variation of -12.2%		variation of -7.4%		bulk (>10 l)	47%	21%	-25.7%	-11.9%
New Zealand	2.7	3.1	1122	1117	bottled (< 2 l)	46%	70%	9.9%	2.6%
					sparkling	0.4%	1%	36.3%	6.6%
					BiB	0.03%	0.03%	-72.3%	-73.2%
	variation of 17.7%		variation of -0.5%		bulk (>10 l)	54%	29%	25.4%	-7.2%
Germany	3.2	3.0	1040	992	bottled (< 2 l)	74%	77%	-12.8%	-10.1%
					sparkling	10%	15%	-14.7%	-5.8%
					BiB	12%	6%	-9.6%	-8.1%
	variation of -7.0%		variation of -4.6%		bulk (>10 l)	4%	1%	21.2%	-1.2%
USA	2.4	2.0	1182	757	bottled (< 2 l)	35%	73%	-39.8%	-42.0%
					sparkling	2%	4%	8.3%	-21.4%
					BiB	3%	3%	-30.3%	-28.5%
	variation of -17.9%		variation of -35.9%		bulk (>10 l)	60%	21%	4.2%	-5.8%
Argentina	2.1	1.9	665	596	bottled (< 2 l)	77%	92%	-6.7%	-12.4%
					sparkling	2%	2%	18.8%	20.2%
					BiB	0.1%	0.1%	185.9%	29.1%
	variation of -6.8%		variation of -10.3%		bulk (>10 l)	21%	6%	-20.0%	-26.0%
Canada	2.0	1.6	75	68	bottled (< 2 l)	1%	24%	-21.2%	-13.2%
					sparkling	0.1%	1%	-60.3%	-53.4%
					BiB	0.2%	1%	-28.2%	-38.5%
	variation of -19.6%		variation of -9.6%		bulk (>10 l)	99%	74%	-19.5%	-6.6%

Sources: OIV, GTA

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¹⁰Countries with wine exports equal to or above 1.5 mhl in 2025



4.4 • Major wine importers

Import demand softened across most major wine markets in 2025, reflecting weaker consumer demand, economic uncertainty and, in some cases, policy-related changes affecting trade conditions. The contraction was broad-based, with lower import volumes recorded in many of the world's principal markets, although the intensity of the decline varied across countries and product segments. At the same time, some signs of resilience emerged in specific categories and markets.

Germany imported **12.9 mhl** of wine in 2025 (-0.6%/2024), while import value increased to **2.6 bn EUR** (+4.0%/2024). Bag-in-box recorded the strongest gains, up 8.3% in volume and 12.4% in value, while bottled wine also increased by 2.5% in volume and 7.8% in value. Sparkling wine decreased by 0.2% in volume but recorded a 1.7% rise in value. Italy remained Germany's leading supplier by both volume and value, with imports increasing by 2.3% and 8.9%, respectively, compared with 2024.

The **USA's** wine imports declined to **12.0 mhl** (-2.0%/2024), while import value declined to **5.5 bn EUR** (-11.6%/2024). The USA remained the world's largest wine importer in 2025 by value. Import performance was constrained by heightened trade uncertainty in 2025, as tariff-related tensions significantly weighed on trade flows. Bottled wine recorded the largest contraction in absolute terms, falling by 3.3% in volume and by 13.0% in value, while continuing to dominate the import structure, accounting for 55% of total import volume and 69% of total import value. Bulk wine followed a similar trend, representing 28% of imported volumes, with declines of 3.3% in volume and 7.6% in value. By contrast, BiB and sparkling wine registered growth in volumes, although sparkling wine recorded a decline in average import price (-11.9%/2024). Italy remained the leading supplier by volume, with 3.5 mhl imported (-0.2%/2024), while France retained its position as the top supplier by value at 2.1 bn EUR (-7.9%/2024). Canada, previously the second-largest supplier by volume, recorded a sharp decline of 0.4 mhl (-19.6%/2024).

The **UK's** wine imports declined to **11.9 mhl** in 2025 (-6.0%/2024), while import value declined to **4.3 bn EUR** (-6.3%/2024). This development largely reflects the introduction of the UK's ABV¹¹-based duty reform in February 2025, which particularly affected high ABV wines.

At category level, bottled wine accounted for 59% of total import value and recorded a significant decline of 6.5% in import value over 2024, while bulk wine registered the steepest contraction in volume, falling by 11.1%. Italy remained the leading supplier by volume, with 2.9 mhl (-2.0%/2024), while France retained its position as the top supplier by value, totalling 1.6 bn EUR (-3.7%/2024).

France, the EU's second-largest wine importer by volume, imported **5.3 mhl** in 2025 (-1.7%/2024), with import value declining to **884 m EUR** (-1.2%/2024). At category level, the contraction in volume was led by bulk wine, down 6.7% compared to 2024, while the decline in value was primarily driven by bottled wine, which fell by 8.0%. Spain remained France's leading supplier by volume, accounting for 65% of imports, despite posting the largest decline among suppliers, down 199 khl (-5.8%/2024). Italy retained its position as the leading supplier by value, accounting for 25% of total import value, while the USA registered the sharpest decline in absolute value terms, falling by 21 m EUR (-27.2%/2024).

Canada imported **3.7 mhl** of wine in 2025 (-3.4%/2024), with import value declining to **1.8 bn EUR** (-7.2%/2024). Bottled wine remained the dominant import category, accounting for 64% of total import volume and 83% of total import value. All categories recorded declines in both volume and value, with the exception of bulk wine, which increased by 5.7% in volume and by 7.4% in value. Among suppliers, the USA registered by far the sharpest contraction, with exports to Canada falling by 0.4 mhl and 0.3 bn EUR compared with 2024, reflecting the impact of trade tensions in 2025.

The **Netherlands** imported **3.3 mhl** of wine in 2025 (-19.5%/2024), while import value declined to **1.3 bn EUR** (-11.1%/2024). All categories recorded decreases in both volume and value, with bottled wine posting the sharpest contraction, down 20.2% over 2024. This category accounted for 86% of total import volume and 82% of total import value. France remained the leading supplier by both volume and value, despite declines of 201 khl (-20.5%/2024) and 59.7 m EUR (-13.4%/2024), respectively. It recorded the largest absolute decline in value among suppliers, while Germany registered an even sharper contraction in volumes.

Belgium's wine imports in 2025 reached **3.0 mhl** (+1.4%/2024), while import value declined to **1.1 bn EUR** (-8.8%/2024). All categories recorded reductions in value, while bottled and sparkling wines registered increases in import volumes.

¹¹ABV stands for Alcohol by Volume. It is a standard measure used to indicate how much alcohol is in a beverage, expressed as a percentage of the total volume.



France remained Belgium's leading supplier by both volume and value, despite declines of 78 khl (-8.0%/2024) and 57.9 m EUR (-9.9%/2024), respectively.

In 2025, **Japan** imported **2.3 mhl** of wine (-2.2%/2024), while import value declined by 1.7% to **1.5 bn EUR**. Sparkling wine accounted for 42% of total import value and was the only category not to register a decline in value. By contrast, all categories recorded lower import volumes, with bulk wine posting the steepest decline (-7.5%/2024). Chile remained Japan's leading supplier by volume, with shipments broadly stable at +3.3 khl (+0.54%/2024), despite a decline in value of 6.4 m EUR (-4.9%/2024). France retained its position as the leading supplier by value, with exports increasing by 10.2 m EUR (+1.18%/2024).

In 2025, **Italy's** wine imports fell to **2.3 mhl** (-10.2%/2024), while import value remained broadly stable at **607 m EUR** (+0.6%/2024). All categories recorded declines in both volume and value. In absolute terms, bulk wine registered the largest drop in volume, down 308 khl (-17.0%/2024), while sparkling wine posted the largest decline in value, decreasing by 13.8 m EUR (-4.8%/2024). France remained Italy's leading supplier by value, despite a decline of 12.4 m EUR (-3.4%/2024), while its export volumes to Italy increased by 40 khl (+13.3%/2024). Spain retained its position as the main supplier by volume, although it recorded the sharpest contraction, with shipments falling by 286 khl (-18.2%/2024).

Portugal recorded an increase in wine imports in 2025, with volumes reaching **2.1 mhl** (+8.4%/2024) and import value rising to **161 m EUR** (+7.4%/2024). Growth was primarily driven by bulk wine, whose imports increased by 15.2% in volume and 17.2% in value. This category accounted for 66.3% of total import volume and 39.7% of total import value. Spain remained by far the dominant supplier, representing nearly 95% of imported volumes and retaining its position as Portugal's leading supplier by both volume and value.

Wine import volume in **China** fell to **2.1 mhl** in 2025 (-26.7%/2024), while import value declined to **1.3 bn EUR** (-14.6%/2024). Bottled wine remained by far the dominant import category, accounting for 91% of total import value. All categories recorded declines in both volume and value, with the exception of sparkling wine, which showed comparatively greater resilience, at least in volume terms. Australia retained its position as China's leading supplier by both volume and value.

By contrast, **Chile**, the second-largest supplier, saw imports fall sharply by 0.4 mhl (-43.7%/2024), reflecting a partial shift in import demand towards Australian wines following the removal of tariffs in March 2024.



Table 6 • Major wine importers¹²

	Volume (mhl)		Value (m EUR)		Type	Vertical Structure in 2025		Variation 2025/2024	
	2024	2025	2024	2025		volume	value	volume	value
Germany	12.9	12.9	2529	2630	bottled (< 2 l)	39%	63%	2.5%	7.8%
					sparkling	5%	17%	-0.2%	1.7%
					BiB	2%	2%	8.3%	12.4%
	variation of -0.6%		variation of 4.0%		bulk (>10 l)	54%	18%	-2.9%	-1.2%
USA	12.3	12.0	6272	5542	bottled (< 2 l)	55%	69%	-3.3%	-13.0%
					sparkling	16%	26%	3.6%	-8.8%
					BiB	1%	0.5%	37.2%	13.3%
	variation of -2.0%		variation of -11.6%		bulk (>10 l)	28%	4%	-3.3%	-7.6%
UK	12.6	11.9	4632	4339	bottled (< 2 l)	49%	59%	-3.2%	-6.5%
					sparkling	14%	27%	-0.1%	-4.2%
					BiB	2%	1%	-19.0%	-16.3%
	variation of -6.0%		variation of -6.3%		bulk (>10 l)	35%	13%	-11.1%	-9.0%
France	5.4	5.3	894	884	bottled (< 2 l)	16%	53%	-13.8%	-8.0%
					sparkling	8%	19%	-2.6%	-1.2%
					BiB	4%	2%	-7.0%	-10.8%
	variation of -1.7%		variation of -1.2%		bulk (>10 l)	72%	26%	-6.7%	-9.1%
Canada	3.8	3.7	1924	1786	bottled (< 2 l)	64%	83%	-5.4%	-13.3%
					sparkling	6%	12%	-2.0%	-4.4%
					BiB	2%	1%	-43.9%	-39.6%
	variation of -3.4%		variation of -7.2%		bulk (>10 l)	29%	4%	5.7%	7.4%
Netherlands	4.2	3.3	1515	1346	bottled (< 2 l)	86%	82%	-20.2%	-11.5%
					sparkling	7%	14%	-10.9%	-10.1%
					BiB	6%	3%	-16.2%	-0.6%
	variation of -19.5%		variation of -11.1%		bulk (>10 l)	2%	1%	-23.8%	-17.8%
Belgium	3.0	3.0	1175	1072	bottled (< 2 l)	60%	62%	7.1%	-8.3%
					sparkling	20%	30%	1.4%	-8.9%
					BiB	6%	3%	-9.8%	-6.5%
	variation of 1.4%		variation of -8.8%		bulk (>10 l)	14%	5%	-13.9%	-14.5%
Japan	2.4	2.3	1517	1492	bottled (< 2 l)	63%	55%	-1.0%	-5.3%
					sparkling	17%	42%	-0.6%	4.4%
					BiB	6%	2%	-6.2%	-6.9%
	variation of -2.2%		variation of -1.7%		bulk (>10 l)	14%	2%	-7.5%	-11.7%
Italy	2.6	2.3	603	607	bottled (< 2 l)	9%	25%	-11.2%	-5.5%
					sparkling	6%	57%	-5.8%	-4.8%
					BiB	0.3%	0.4%	-43.1%	-2.0%
	variation of -10.2%		variation of 0.6%		bulk (>10 l)	85%	17%	-16.9%	-9.2%
Portugal	1.9	2.1	150	161	bottled (< 2 l)	28%	37%	-1.8%	-0.9%
					sparkling	3%	22%	8.9%	9.5%
					BiB	2%	1%	-24.7%	-22.2%
	variation of 8.4%		variation of 7.4%		bulk (>10 l)	66%	40%	15.2%	17.2%
China	2.8	2.1	1474	1258	bottled (< 2 l)	64%	91%	-19.6%	-14.1%
					sparkling	3%	5%	6.1%	-7.6%
					BiB	1%	0.4%	-31.8%	-36.2%
	variation of -26.7%		variation of -14.6%		bulk (>10 l)	32%	4%	-39.6%	-27.1%

Sources: OIV, GTA
 * 2024 data on Russia not available

¹²Countries with wine imports equal to or above 2 mhl in 2025. Data on Russia not available.



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
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