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## Press Release

# Fragile recovery for European wine in 2025: Production rises slightly, but challenges persist

**The European wine sector is reporting an estimated 145.5 million hectolitres (Mhl) of wine production for 2025, representing a 1% increase compared to the previous year. Although volumes are recovering, they remain 7.5% below the five-year average. Overall, production is showing signs of improvement; however, a long-term downward trend persists, the gap between the 2025 and 2018 harvests still exceeds 40 million hectolitres. Vineyards across Europe continue to face a combination of challenges that hinder the sector's full recovery.**

The three largest wine producers in the EU, which together account for four-fifths of total volumes, have cut their combined output by 1.5% compared with the 2024 harvest. Italy remains the EU's largest producer with an estimated 47 million hectolitres (Mhl), while France narrowly holds second place at around 37 Mhl, and Spain falls to third with approximately 31.5 Mhl.

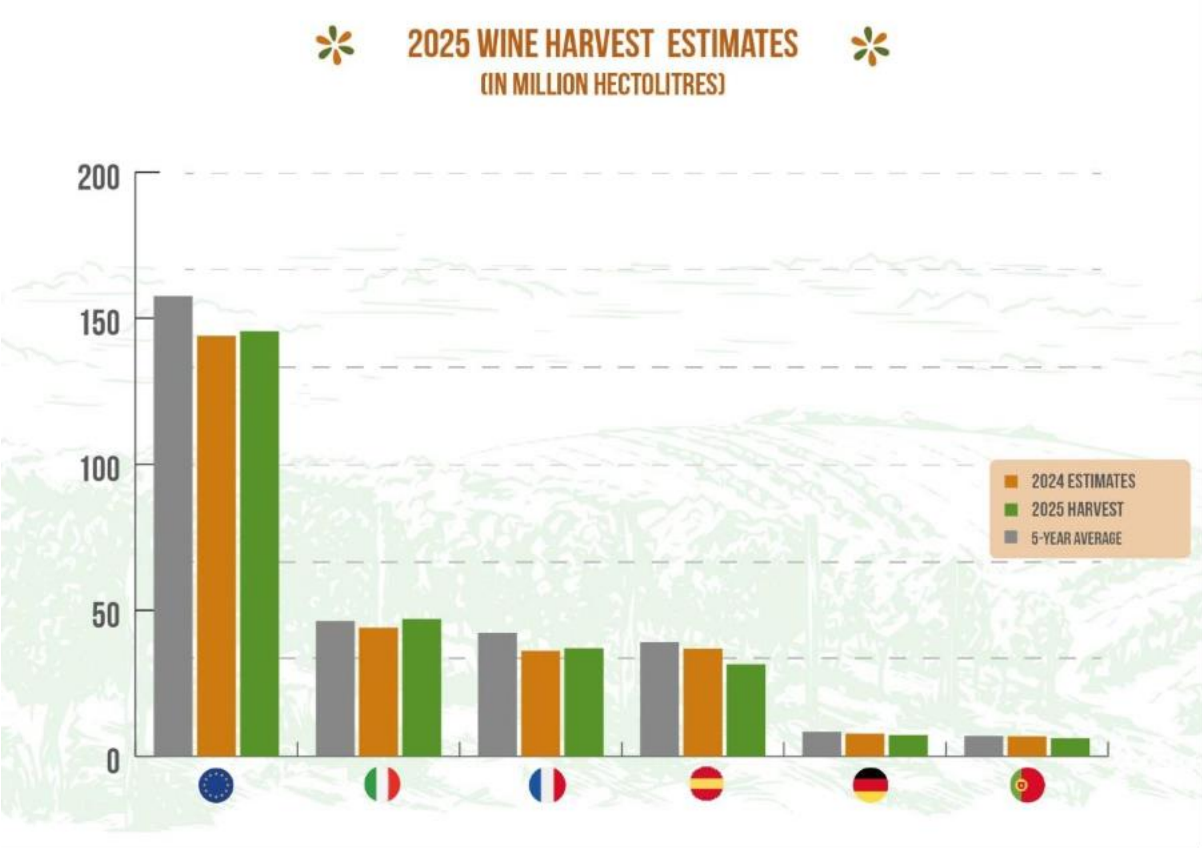
Among the major producers, Spain, Germany, and Portugal all saw declines, with production down 15%, 8%, and 11% respectively compared to last year. In contrast, Italy expects an 8% increase, and France also records a modest rise of about 2.3%, although its output remains 12% below the five-year average.

Vineyards have witnessed large weather anomalies and severe adverse events in 2025. Heatwaves, droughts and floods hindered the ability of the sector to get back to anywhere close to pre-2020 levels. Late August wildfires in southern France destroyed more than a thousand hectares of vineyards, potentially indirectly impacting up to sixteen thousand.

Although wine supply remains low, demand-side pressures are limiting any significant increase in production. The largest market for European wines, the USA, has repeatedly imposed tariffs on EU goods, including wine, driving exports. This new American policy has kept both volumes and prices low, eroding profit margins of EU producers. These trade barriers come in a period in which global instability has already been disrupting worldwide commercial flows.

In general, demand remains weak. Economic fears such as inflation and uncertainties in the job market keep expenditure at bay, while a substantive change in preferences has been occurring in domestic markets. These factors do not allow demand to compensate the reduced volumes of production.

Luca Rigotti, president of the Copa-Cogeca's working party on wine, commented, *"The 2025 harvest highlights just how challenging conditions remain. Our vineyards often face circumstances that are far from ideal. Yet, in many cases, producers have managed to reverse the recent downward trend. Across Europe, winegrowers are delivering exceptional quality, demonstrating remarkable dedication and resilience in the face of numerous challenges."*




*Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, France, Germany, Greece, Hungary, Ireland, Italy, Lithuania, Luxemburg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden

Source: Aggregated data from internal survey, OIV, Eurostat, national ministries, European Commission

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**Note for editors** – Here are some more detailed insights on the situation in Europe's main wine-producing countries:

**FRANCE**: A harvest in line with the previous year, being markedly under the five-year average. France regains the spot as the second largest producer in the EU; even though the gap with the largest producer widens. The current harvest has seen the consolidation of trends that have hindered the productive capabilities of French winegrowers. Extreme weather events have been exacerbating a general climatic situation that damages French production in most regions. The management of water, with areas receiving too much while other not collecting enough, is complicated by a scattered and increasingly less predictable precipitation pattern. For most vineyards, flowering took place in chill and humid conditions, leading to "*coulure*" (flower and berry drop) and "*millerandage*" (the formation of small grapes). The lack of precipitation and the decreased ground humidity have also favoured in the summer the spread of wildfires in southern France. 2025 saw the beginning of a programme of definitive grubbing consolidating the structural scaling back of vineyards in the Country.

**ITALY**: The country is forecasted to increase production, even though recent estimates have curbed the more positive outlooks of the start of the harvest season. Italy's increase in production is set to be in line with the five-year average, narrowly surpassing it. This moderately positive outlook consolidates the position of the country as the Union's largest producer in terms of volume. Nineteen out of twenty Italian regions are increasing their wine production, with the south growing at a faster rate than other areas, thus regaining some of the ground they lost in recent years. Italy has been relatively unscathed by major climatic events, and the increase in production is, at least in part, a consequence of this fact. Autumn and winter were characterized by mild weather. Rainfall was abundant in central and northern Italy, resulting in good water reserves and creating favourable conditions for the start of the growing season. Spring saw frequent weather disturbances, the resulting abundance of rain ensured a good water supply, but it also increased phytosanitary pressure, particularly from downy mildew. In 2025 the fastest growing regions in terms of production volumes are Basilicata, Abruzzo and Molise, increasing their production between 25% and 40%. The overall largest producer remains Vento with 12 million hectolitres (Mhl).

**SPAIN**: Spain witnessed a reduction in their volumes consolidating a downward trend in wine production. The 2025 production of 31.5 million hectolitres (Mhl) sits at a value one fifth smaller than the five-year average. Adverse weather conditions such as high temperatures coupled with frequent heatwaves are putting a major strain on the sector in the Iberian Peninsula, with the hardest effects being felt in the interior. The conditions in spring were positive allowing for a forecast in line with the five-year average, but an extremely dry summer, especially for the month of August, decimated the autumn harvest. In the meantime, Spanish winegrowers have also been hit especially hard by mildew. Even though the volumes are lower than expected, the quality is extremely high; in fact, there is widespread satisfaction across the sector for the quality of the wines, a testament to the resilience of producers in the face of many adverse challenges. Spain remains the Member State with the largest surface area dedicated to viticulture.

**GERMANY**: 2025 marks the second year in a row of contraction in production volumes in Germany, resulting in a value 14% lower than the five-year average. The situation is further aggravated by the decline in demand which puts further pressure on this sector.

**PORTUGAL:** The country saw a marked decrease in production of 11%, the largest between the five EU major producers. **Austria** and the **Netherlands** have reported an increase in their respective production, with the latter having an above average harvest.

**SWEDEN:** The 2025 European Wine Harvest event "Wine and climate change: adapting traditions, exploring new frontiers" saw the participation for the first time of a **Swedish** producer. The Scandinavian country only has 65 winegrowers and a production volume of 2 thousand hectolitres (Mhl), but the sector is growing fast exploiting the changing climate of the region.

Translations will be available in DE, ES, FR, IT, PL and RO on the Copa-Cogeca website soon.

About us - Copa and Cogeca are the united voice of farmers and agri-cooperatives in the EU. Together, we ensure that EU agriculture is sustainable, innovative and competitive, while guaranteeing food security for 500 million people throughout Europe. >>> More information www.copa-cogeca.eu

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