



World Wine Production Outlook |

First Estimates 2025



International Organisation
of Vine and Wine
Intergovernmental Organisation



PUBLICATION INFORMATION

PUBLISHED BY THE INTERNATIONAL ORGANISATION OF VINE AND WINE
1, Rue Monge
21000 Dijon, France
www.oiv.int

ISBN 978-2-85038-130-0
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When referencing this publication, please use the following citation: OIV. (2025, November). *World Wine Production Outlook 2025*. International Organisation of Vine and Wine.

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Preparation and coordination

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METHODOLOGICAL NOTE

The 2025 global wine production estimate is based on data collected from 29 countries for which official or well-documented figures were available. These countries together represent about 85% of world production and serve as the statistical foundation for estimating the total output of all wine-producing countries worldwide. The resulting world total therefore reflects an OIV estimate for global production, not merely the sum of the countries providing data.

For OIV Member States, figures are derived primarily from official questionnaires submitted to the Organisation. For non-Member States, data sources include national statistical offices, sectoral institutes, and, where necessary, specialised press or expert assessments.

All data were consolidated up to October 2025 and may be revised in April 2026 as final harvest declarations become available. Figures for 2024 are considered provisional, and those for 2025 are preliminary as, in official statistics, data generally require around three years to be considered as consolidated.

Unless otherwise stated, all wine production volumes exclude juices and musts.

ABBREVIATIONS

Area

ha	hectares
kha	thousand hectares
mha	million hectares

Volume/weight

l	litres
hl	hectolitres
khl	thousand hectolitres
mhl	million hectolitres
kg	kilograms
t	tonnes
kt	thousand tonnes
mt	million tonnes

Monetary

EUR	euros
m EUR	million euros
bn EUR	billion euros

Statistical notation

avg.	average
var.	variation
prov.	provisional
prel.	preliminary
na	not available



KEY HIGHLIGHTS

Global wine production in 2025, estimated at **232 mhl**, shows a **slight recovery** after last year's exceptionally low volume, yet output remains **well below recent averages**, confirming a period of persistently reduced global supply, impacted by climatic challenges and evolving consumption models.

In the **European Union** (140 mhl), production **increased modestly** compared with 2024 but remains significantly under the five-year average. The region continues to face **high climatic variability**, with France and Spain recording very low harvests, Italy recovering to near-normal levels, and several Central and Southeastern European countries achieving above-average results.

In the **rest of the Northern Hemisphere**, outcomes were **mixed**. The United States recorded only a partial rebound from 2024's low harvest, while other producers such as Russia, Moldova, and Switzerland are expected to maintain stable or slightly higher than average volumes.

The **Southern Hemisphere** (49 mhl) experienced a **moderate recovery from 2024**, driven by improved conditions in South Africa, Australia, New Zealand and Brazil, which offset the significant decline seen in Chile. Overall, the hemisphere's production remains **slightly below average**, reflecting **ongoing climatic challenges**.

Despite these regional differences, the **global market** may be **broadly balanced**: limited production growth in 2025 is expected to help **stabilise inventories** in a context of softening consumption in mature markets and heightened **uncertainty in global trade conditions**.



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Chapter 1. World production

Global wine production in 2025 is **estimated between 228 and 235 mhl**, with a **mid-range projection of 232 mhl**. This represents a **3% increase compared with the historically low 2024 volume**, yet remains **around 7% below the five-year average**.

The **limited global recovery in 2025 reflects moderate increases in both the Northern and Southern Hemispheres, where output rose slightly compared with 2024 but stayed below average in several key regions**. In Europe, production—though marginally higher than in 2024—was still below average, constrained by France’s small harvest, Spain’s persistent drought, and adverse weather conditions in Portugal and Germany. Outside Europe, Chile recorded one of the sharpest contractions, while the United States continued to fall short of its five-year average despite a modest rebound.

More favourable conditions in certain regions partly mitigated the overall decline. Italy’s rebound—reasserting its position as the world’s leading wine producer—along with above-average harvests in several Central and Southeastern European countries and key Southern Hemisphere producers helped offset losses elsewhere, yet global output remained around 7% below its five-year average.

As in recent years, **climatic variability remained the dominant factor shaping global wine production in 2025**. In the Northern Hemisphere, producers faced contrasting weather patterns—from prolonged drought and heat limiting yields in parts of southwestern Europe to excess rainfall, storms, and disease pressure elsewhere—resulting in highly uneven outcomes across regions. Only a few areas experienced more balanced conditions, where regular rainfall and moderate temperatures supported above-average harvests. In the Southern Hemisphere, weather patterns were likewise mixed: heatwaves, drought, and irregular rainfall reduced yields in parts of Chile and kept Australia below average despite a modest recovery, while some regions benefited from a mild and predominantly dry season. Overall, the **2025 climatic pattern underscores the increasing variability between and within hemispheres**, with favourable conditions in some areas insufficient to offset weather-related losses elsewhere.

Against a backdrop of **weakened global demand and elevated inventories** in several mature markets, a **third consecutive year of below-average production** tends to **ease pressure on stock** rather than create widespread supply tension. Overall, 2025 points to a **slightly tighter but still balanced** global market, with price and trade effects likely to **remain sector- and region-specific** rather than generalised.

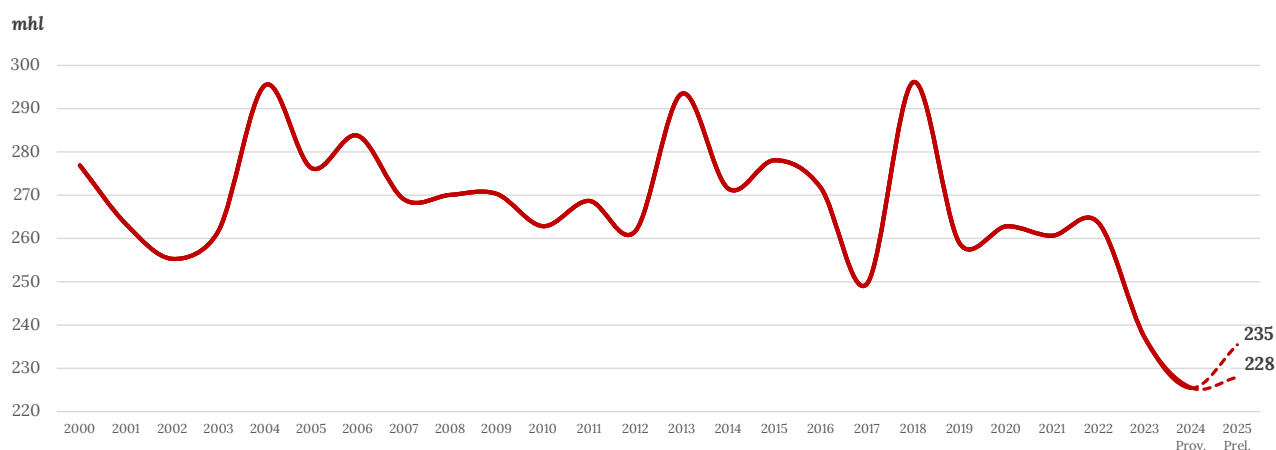


FIGURE 1. World wine production volume, 2000-2025



Chapter 2. Northern hemisphere

2.1 European Union (EU)

In the European Union (EU), **wine production in 2025 is provisionally estimated at around 140 mhl**, representing a **moderate increase of 2.1 mhl (+2%)** compared with 2024. Despite this recovery, output remains **8% below the five-year average**. If confirmed, 2025 would mark the **second-lowest level of EU wine production recorded since the beginning of the 21st century**. The EU continues to account for **60% of global wine output**, a share consistent with the average of the past decade.

The 2025 season underscores the **persistent climatic volatility** affecting European vineyards. Producers once again faced contrasting weather conditions, ranging from drought and heat episodes to excess rainfall and localised storms, which led to uneven yields and ongoing pressure on vine health. Although the extent of losses varied by region, overall conditions highlight the growing influence of extreme weather events on EU wine production and the increasing year-to-year variability in countries' output levels.

In 2025, **Italy** is confirmed as the world's largest wine producer, with an estimated output of **47.4 mhl**, representing an increase of **3.3 mhl (+8%)** compared with 2024. This result marks a recovery from the exceptionally low volumes recorded in 2023 and, to a lesser extent, in 2024. The 2025 production is estimated to stand **around 2% above the five-year average**. Favourable weather conditions supported this rebound, with a mild spring, balanced rainfall, and a summer that was overall not excessively hot.

Production growth was geographically uneven, driven mainly by southern regions (+19%) and moderate increases in northern areas, while central Italy recorded a slight decline (-3%), largely due to lower output in Tuscany.

France's 2025 wine production is estimated at 35.9 mhl, marking a **second consecutive year of historically low output**, around **16% below the five-year average**. This small harvest results primarily from the **combined effects of heat and drought**, which severely affected yields in several major wine regions. Vineyard restructuring, including a reduction of about 20 kha in Bordeaux and Languedoc-Roussillon, also contributed to the decline. Regional developments were uneven: Champagne and the Loire Valley and Burgundy benefited from more favourable weather conditions and posted moderate increases, whereas Bordeaux, Languedoc-Roussillon, Charentes, Alsace, and Beaujolais faced further declines due to climatic stress and disease pressure. If confirmed, the 2025 volume would represent **France's lowest wine production since 1957 (32.5 mhl)**.

In 2025, **Spain** remains the **third-largest wine producer in the European Union**, with an estimated output of **29.4 mhl**, a decrease of **1.7 mhl (-6%)** compared with 2024 and **15% below the five-year average**. This marks one of the country's smallest harvests in recent decades, with production falling below 30 mhl only twice in the last 30 years — **in 2023 and 2025**.

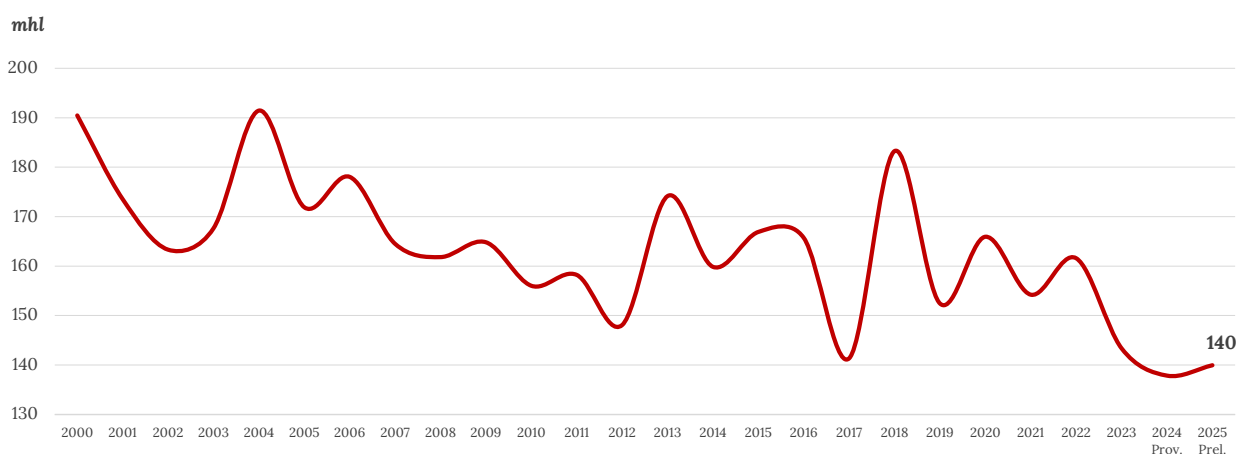


FIGURE 2. Wine production in the EU¹, 2000-2025

¹ For comparability over time, EU aggregate figures are calculated using a constant composition corresponding to the 27 Member States in 2025, rather than the number of members in each historical year.



The decline reflects the **prolonged drought now in its third consecutive year**, compounded by intense summer heat and localised hailstorms, which together have stressed vineyards, reduced yields, and delayed ripening across much of the territory. Water scarcity and increasing climate volatility have also accelerated the contraction of vineyard area.

Apart from France and Spain, **some other EU countries are expected to record a decline in 2025** compared with 2024. The largest among them is **Germany**, where production is estimated at **7.3 mhl**, down **6% from last year and 14% below its five-year average**, due to heavy rainfall in September that forced an early harvest and reduced yields. **Portugal (6.2 mhl, -11%)** also experienced a parched winter followed by record rainfall in early spring, later aggravated by **successive summer heatwaves**. Finally, in **Bulgaria (0.6 mhl, -5%)** experienced **severe spring frosts** damaged vines across central and southern regions, resulting in the **lowest production in decades**.

Among EU countries that saw growth compared with 2024, **several nonetheless remain below average**. **Greece** is expected to recover modestly to **1.5 mhl**, about **9% higher than in 2024 yet 20% below its five-year average**, reflecting persistent drought and structural challenges. **Slovakia, Luxembourg, and Cyprus** likewise show moderate year-on-year increases but remain **below their five-year averages**.

By contrast, a group of Central and Southeastern European countries recorded relatively abundant harvests, with output at or above their five-year averages. In **Romania**, wine production is projected to rise by **29% year on year to 4.1 mhl**, slightly above its five-year average, supported by late-season rainfall. **Hungary** maintained a stable output of **2.7 mhl**, in line with last year but **about 5% above its five-year average**, reflecting generally favourable growing conditions. **Austria** also reports a strong rebound to **2.5 mhl**, roughly **6% above average**, thanks to balanced temperatures and good ripening conditions. **Slovenia, Croatia, and Czechia** registered stable or higher volumes than in 2024, placing them **close to or above their five-year averages**.

TABLE 1: Wine production in EU countries

Unit: mhl	2020	2021	2022	2023	Prov. 2024	Prel. 2025	25/24 Var.	25/24 Var. (%)	5-year Avg.	25/ 5-year Var. (%)
Italy	49.1	50.2	49.8	38.3	44.1	47.4	3.3	▲ 8%	46.3	▲ 2%
France	46.7	37.6	46.0	47.2	36.1	35.9	-0.2	▼ -1%	42.7	▼ -16%
Spain	40.9	35.5	36.0	28.4	31.1	29.4	-1.7	▼ -6%	34.4	▼ -15%
Germany	8.4	8.4	8.9	8.6	7.8	7.3	-0.5	▼ -6%	8.4	▼ -14%
Portugal	6.4	7.4	6.8	7.5	6.9	6.2	-0.7	▼ -11%	7.0	▼ -12%
Romania	3.8	4.5	3.8	4.6	3.1	4.1	0.9	▲ 29%	4.0	▲ 3%
Hungary	2.6	2.6	2.5	2.4	2.7	2.7	-0.0	▲ -0.1%	2.6	▲ 5%
Austria	2.4	2.5	2.5	2.4	2.2	2.5	0.4	▲ 17%	2.4	▲ 6%
Greece	2.2	2.4	2.1	1.4	1.4	1.5	0.1	▲ 9%	1.9	▼ -20%
Slovenia	0.7	0.6	0.5	0.5	0.5	0.8	0.3	▲ 64%	0.6	▲ 36%
Bulgaria	0.8	0.8	0.7	0.7	0.6	0.6	-0.0	▼ -5%	0.7	▼ -18%
Croatia	0.7	0.5	0.6	0.5	0.4	0.6	0.1	▲ 24%	0.5	▲ 4%
Czechia	0.6	0.6	0.6	0.5	0.5	0.5	0.1	▲ 21%	0.5	▲ 0%
Slovakia	0.4	0.3	0.3	0.3	0.3	0.3	0.0	▲ 3%	0.3	▼ -8%
Luxembourg	0.1	0.1	0.1	0.1	0.1	0.1	0.0	▲ 12%	0.1	▼ -4%
Cyprus	0.1	0.1	0.1	0.1	0.1	0.1	0.0	▲ 31%	0.1	▼ -4%
Malta	0.01	0.01	0.01	0.01	0.01	na	na	na	0.01	na
EU27	166	154	162	143	138	140	2.1	▲ 2%	153	▼ -8%



2.2 Northern Hemisphere (excl. EU)

In 2025, the **USA** – the **fourth-largest wine producer globally** – is expected to produce **21.7 mhl of wine**. The figure represents a **3% increase compared with 2024**, though it remains **well below historical peaks (9% below the five-year average)**. It marks a partial rebound from the exceptionally small 2024 harvest, when a combination of market adjustments and reduced vineyard yields resulted in the smallest output in decades. This estimate is based on state-level harvest data from California, Washington, and Oregon, which together account for about 85–90% of national wine-grape production. California is forecast to record a moderate increase of around 4%, Washington a decline of about 21%, and Oregon a notable recovery of roughly 30%, illustrating diverging climatic conditions across the West Coast.

In 2025, **Russia's** wine production is estimated at around **5.1 mhl, remaining close to last year's level (–1%)** and **about 9% above the five-year average**. Although preliminary and based on early-season assessments, this estimate indicates that output should remain close to record levels.

As for **China**, data on the **wine grape harvest for 2025 remains unavailable**. Updated figures for the year will be released in the first semester of 2026.

In 2025, **Georgia's** wine production is anticipated to reach around **2.1 mhl, down 14% from the 2024 record** but still **slightly above the five-year average (+2%)**. The decline follows an exceptionally abundant 2024 harvest, while weather conditions in 2025 were generally favourable, allowing production to remain close to recent highs.

In 2025, **Moldova's** wine production is **forecast at around 1.4 mhl, an increase of 18% compared with 2024** and **slightly above the five-year average (+3%)**. The recovery is mainly linked to favourable spring weather, with abundant rainfall improving soil moisture and supporting grape development. This represents a clear contrast with the severe water stress and late frosts that negatively affected the 2024 harvest.

In 2025, **Switzerland's** wine production is projected at around **1.0 mhl, up 29% from the low volumes of 2024** and **16% above the five-year average**. The increase reflects a return to favourable weather conditions after the severe frost and disease pressure that limited yields in 2024.

TABLE 2: Wine production in major countries in the Northern Hemisphere, excluding the EU

Unit: mhl	2020	2021	2022	2023	Prov. 2024	Prel. 2025	25/24 Var.	25/24 Var. (%)	5-year Avg.	25/ 5-year Var. (%)
USA	23.9	25.3	23.5	25.5	21.1	21.7	0.5	▲ 3%	23.9	▼ -9%
Russia	4.4	4.3	5.0	4.5	5.1	5.1	-0.0	▼ -1%	4.7	▲ 9%
China	6.6	5.9	4.7	3.2	2.6	<i>na</i>	<i>na</i>	<i>na</i>	4.6	<i>na</i>
Georgia	2.1	1.9	1.9	1.9	2.4	2.1	-0.3	▼ -14%	2.0	▲ 2%
Moldova	0.9	1.4	1.4	1.8	1.2	1.4	0.2	▲ 18%	1.3	▲ 3%
Switzerland	0.8	0.6	1.0	1.0	0.8	1.0	0.2	▲ 29%	0.8	▲ 16%



Chapter 3. Southern hemisphere

In the **Southern Hemisphere**, where the wine harvest concludes during the first half of the year, **preliminary estimates for 2025 point to a slight recovery in production**. After three consecutive years of declining, total output is expected to rise to around **49 mhl**, a **7% increase compared with 2024**, though still **about 5% below the five-year average**. This reflects the impact of adverse climatic events, notably heatwaves, drought, and irregular rainfall patterns that affected several major producing areas. 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 21% of global wine output**, a share consistent with the past decade's average.

In 2025, **Australia's wine production is estimated at around 11.6 mhl**, up 11% compared with 2024 but 2% 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 forecast at 3.7 mhl**, a 32% increase over 2024 and 15% above the five-year average. The rise follows a difficult 2024 season, when **spring frost during flowering** affected yields. The **2025 harvest** is therefore expected to be **the second largest on record** for the country.

In 2025, **Argentina's wine production is forecast at 10.7 mhl**, a volume **similar to 2024** and **slightly below the five-year average**. This level positions Argentina as the leading wine producer in South America.

Chile is expected to produce around **8.4 mhl** in 2025, representing a **decline of 10% compared with 2024** and **26% below its five-year average**. This marks the **fourth consecutive year of decreasing production**.

The pronounced downturn, which began in 2022, is largely linked to persistent **water scarcity** and heightened climatic variability. In 2025, a warm summer and repeated heatwaves in January and February led to early ripening and reduced yields. **Brazil's wine production is projected at about 2.9 mhl**, representing a **strong recovery (+38%)** from the small 2024 vintage and **15% 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. **Uruguay** recorded a production volume of **0.6 mhl**, down 7% over 2024's level and 8% below the average observed since 2020.

In 2025, **South Africa's wine production is projected at around 8.8 mhl**, up 16% from 2024 and close to its **five-year average**. This marks a full recovery after the last two difficult vintages affected by adverse weather conditions. The 2025 harvest benefited from mild and predominantly dry conditions across most winegrowing regions, which supported healthy vine development and improved yields. Favourable ripening was reported in both coastal and inland areas, with limited disease pressure contributing to the overall recovery in production.

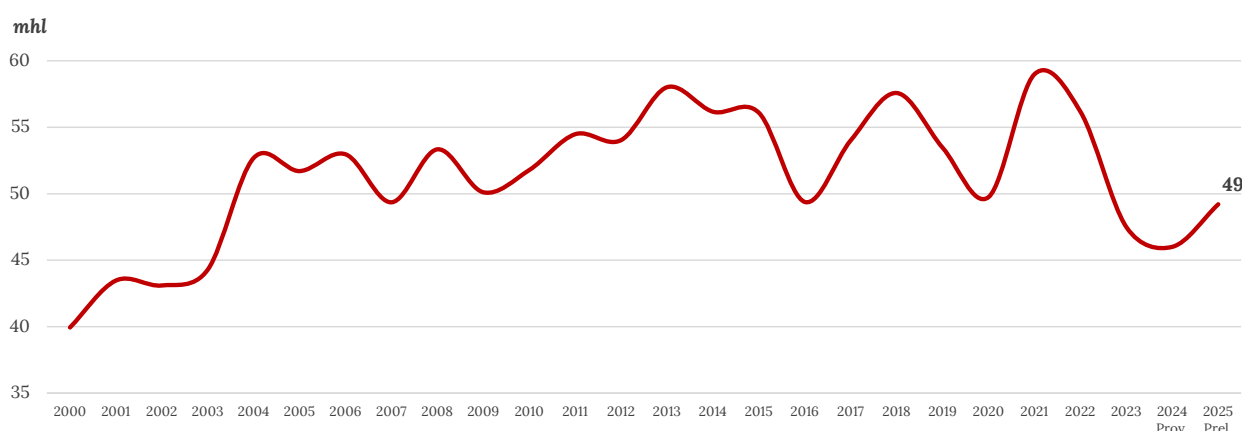


FIGURE 3 – Wine production in the Southern Hemisphere, 2000–2025

**TABLE 3:** Wine production in major countries in the Southern Hemisphere

Unit: mhl	2020	2021	2022	2023	Prov. 2024	Prel. 2025	25/24 Var.	25/24 Var. (%)	5-year Avg.	25/ 5-year Var. (%)
Australia	10.9	14.8	13.1	9.6	10.4	11.6	1.1	▲ 11%	11.8	▼ -2%
Argentina	10.8	12.5	11.5	8.8	10.9	10.7	-0.2	▼ -1%	10.9	▼ -2%
South Africa	10.4	10.8	10.3	9.3	8.8	10.2	1.4	▲ 16%	9.9	▲ 3%
Chile	10.3	13.4	12.4	11.0	9.3	8.4	-0.9	▼ -10%	11.3	▼ -26%
New Zealand	3.3	2.7	3.8	3.6	2.8	3.7	0.9	▲ 32%	3.2	▲ 15%
Brazil	2.3	2.9	3.2	2.3	2.1	2.9	0.8	▲ 38%	2.6	▲ 15%
Uruguay	0.7	0.7	0.8	0.5	0.7	0.6	-0.0	▼ -7%	0.7	▼ -8%
Southern Hemisphere	50	59	56	47	46	49	3.2	▲ 7%	52	▼ -5%



**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:

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