

**WB
WE** **World
Bulk Wine
Exhibition**

**24 – 25 NOVEMBER
2025**

Amsterdam RAI | Hall 5

**KEYNOTE
CONFERENCE 2025**



**International Organisation
of Vine and Wine**
Intergovernmental Organisation

STATE OF THE GLOBAL WINE SECTOR

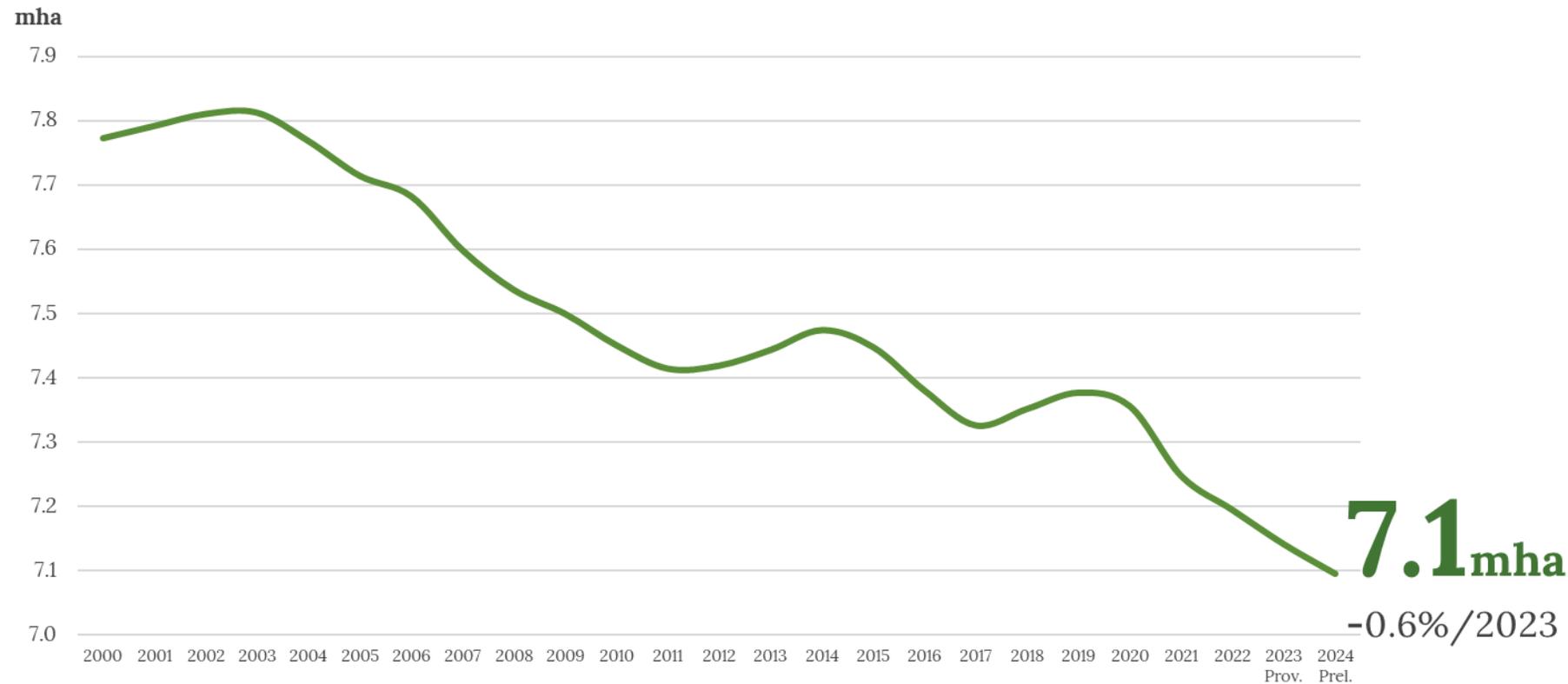
24 November 2025 – WBWE25 Keynote Conference

Giorgio Delgrosso

Head of Statistics and Digital Transformation Department

Vineyard Surface Area

Evolution of world vineyard surface area



Grape for all uses

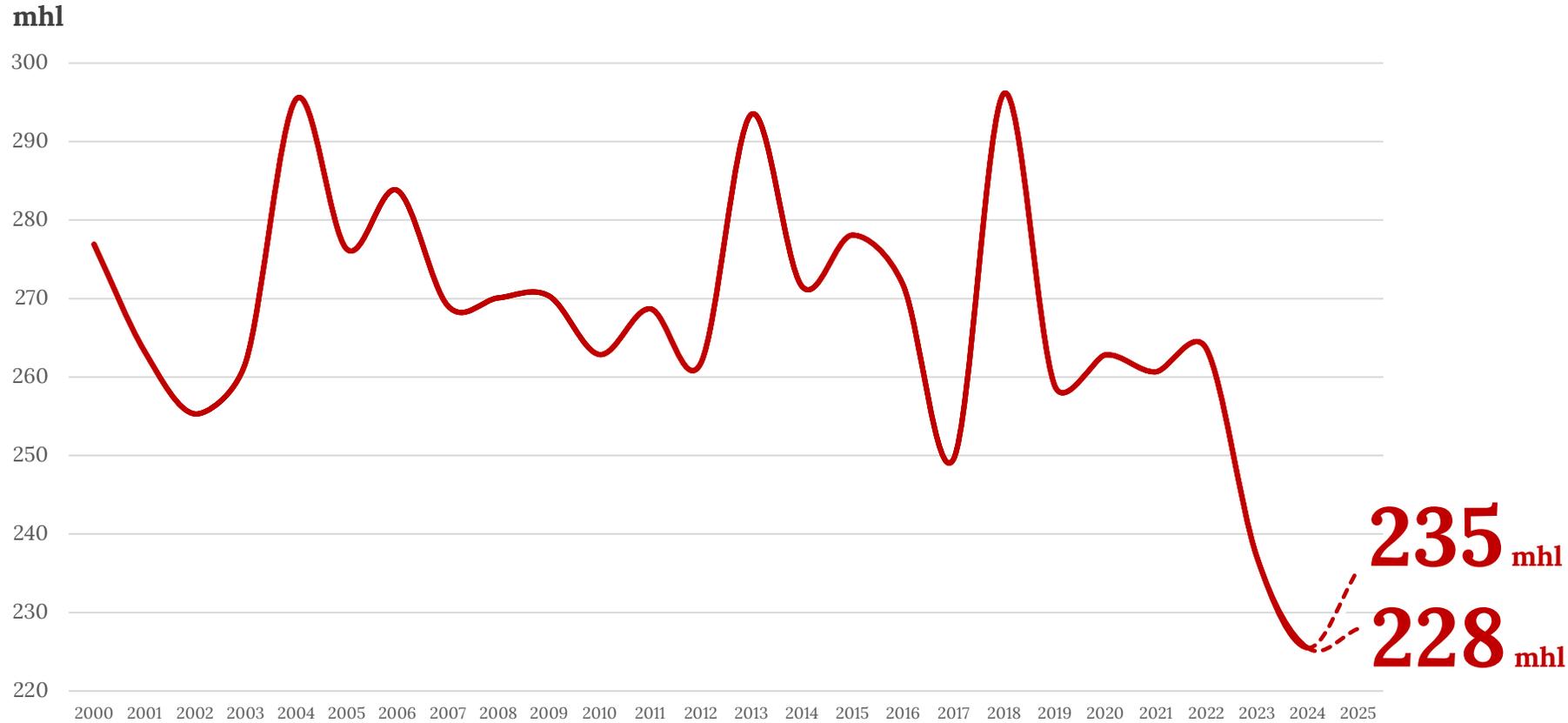


9% drop since 2000



EU = 46%
SH = 12%

Wine Production



3rd year of low output



7% below 5-year average



Climatic stress



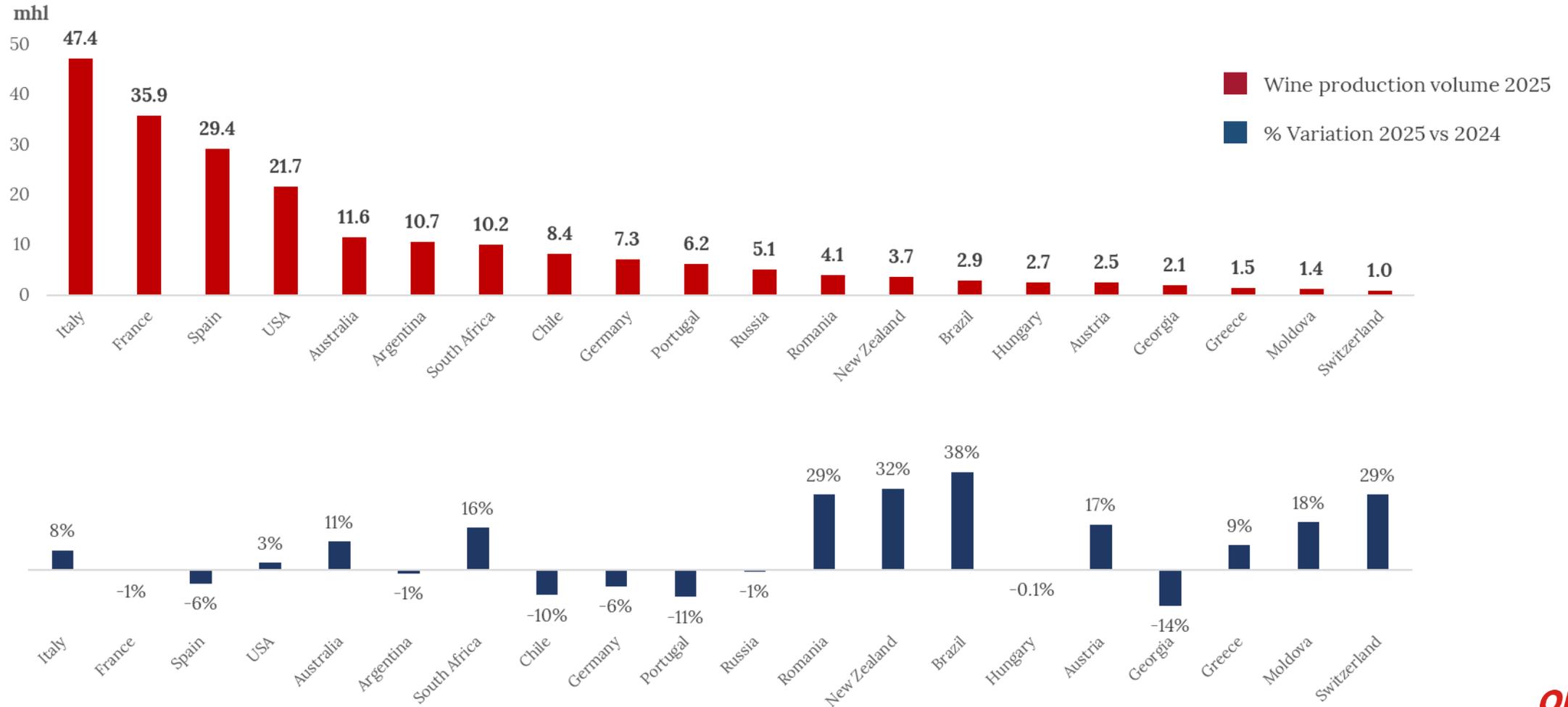
Shrinking vineyard area



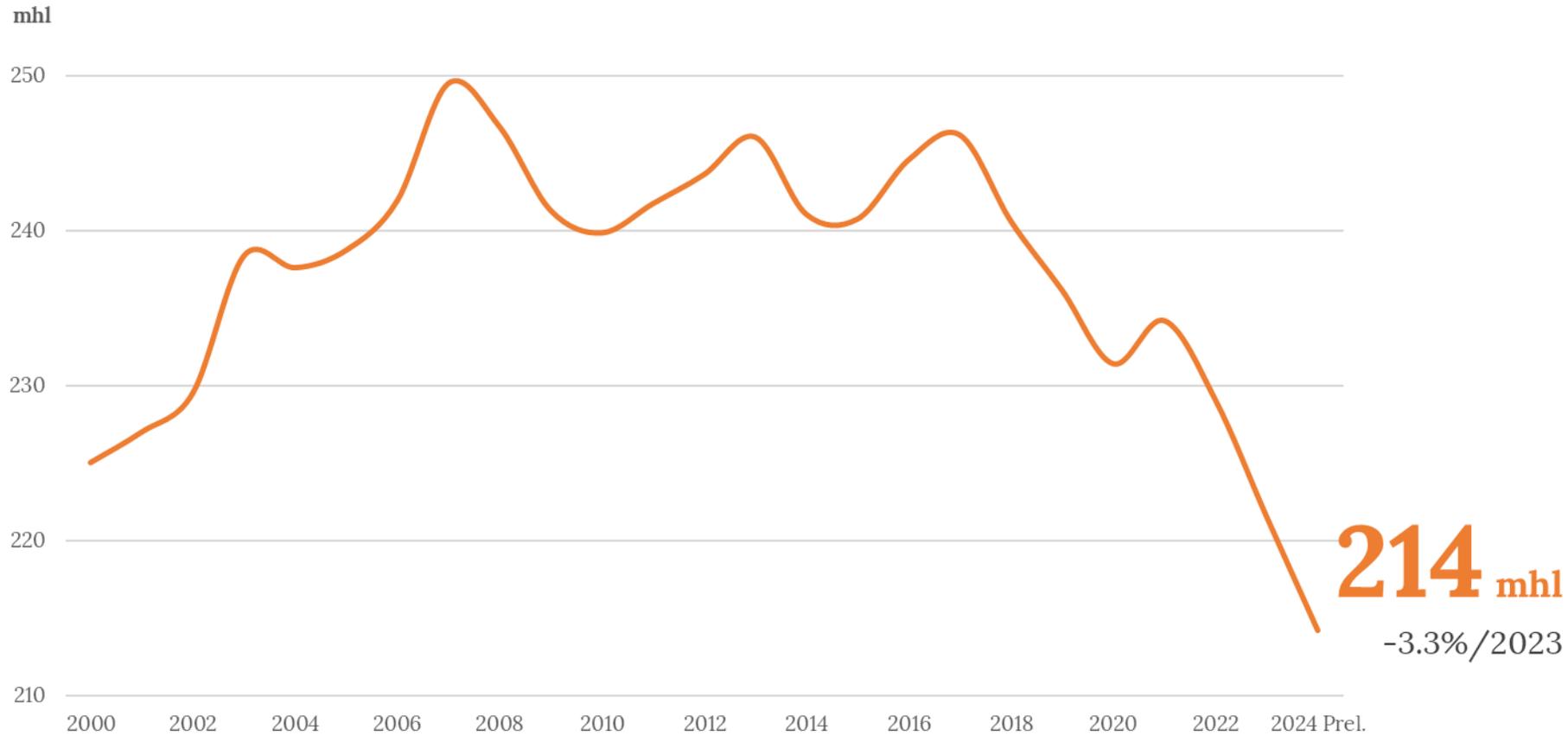
Easing market pressure

OIV

Wine Production



Wine Consumption

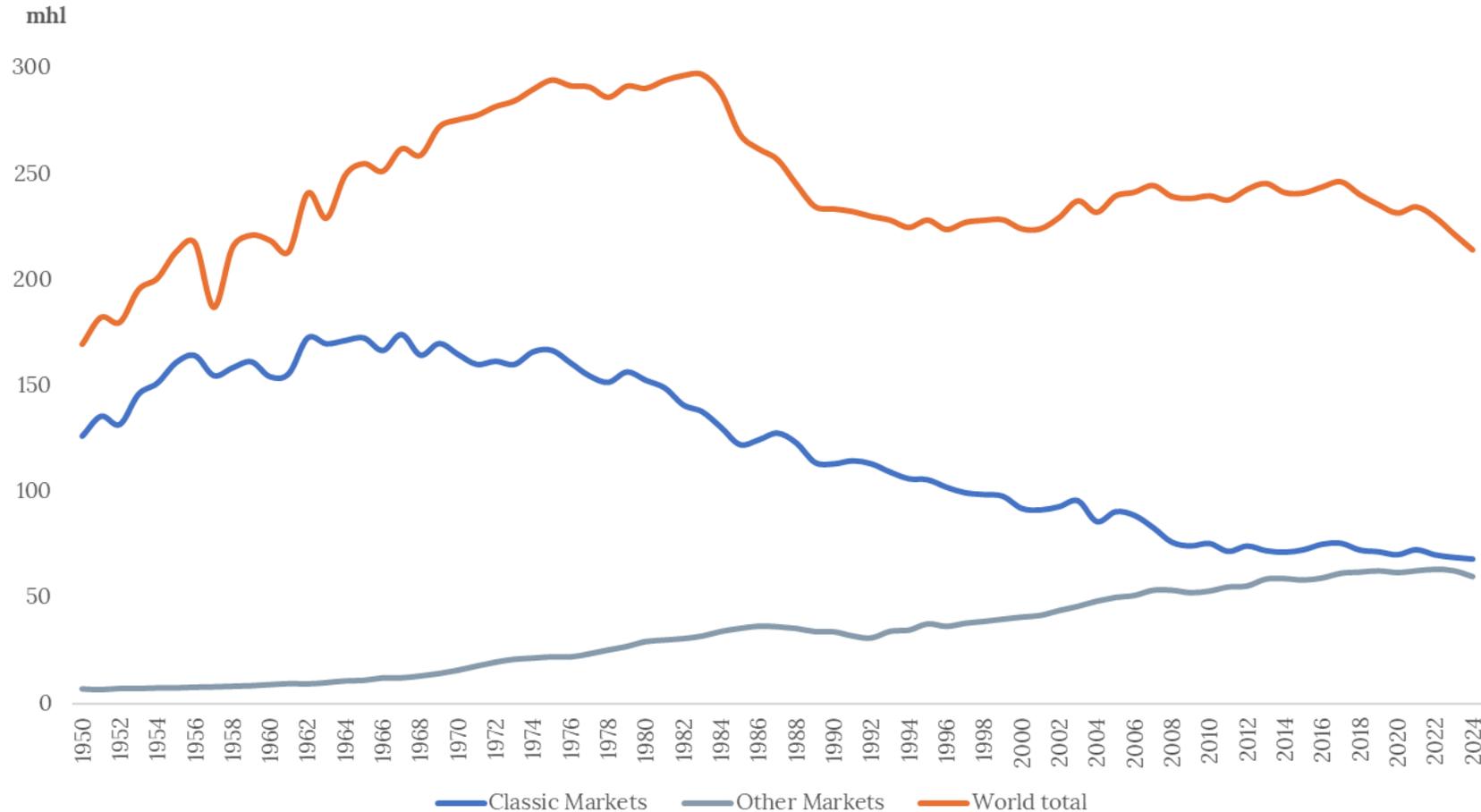


↓
Lowest
since 1961


Inflationary
pressures


Consumer's
preferences

Wine Consumption



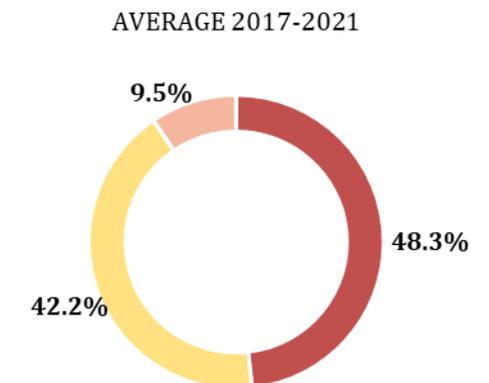
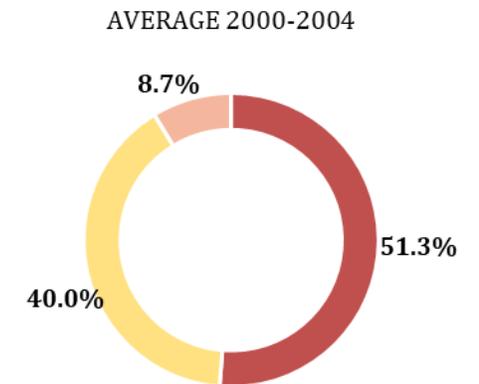
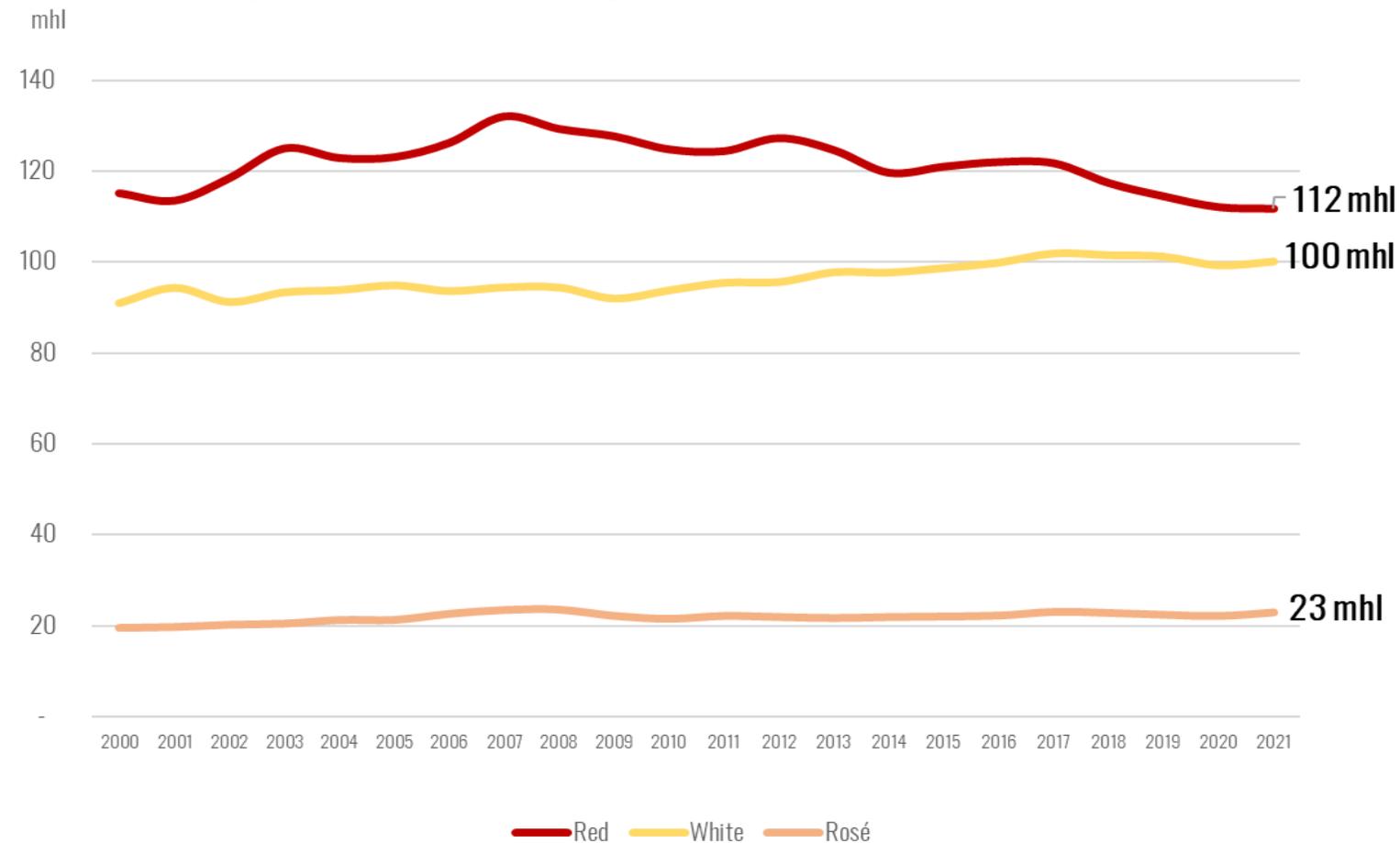
Classic Markets
Italy, France, Spain,
Portugal, Argentina



Other Markets
USA, Australia,
Canada, UK,
South Africa

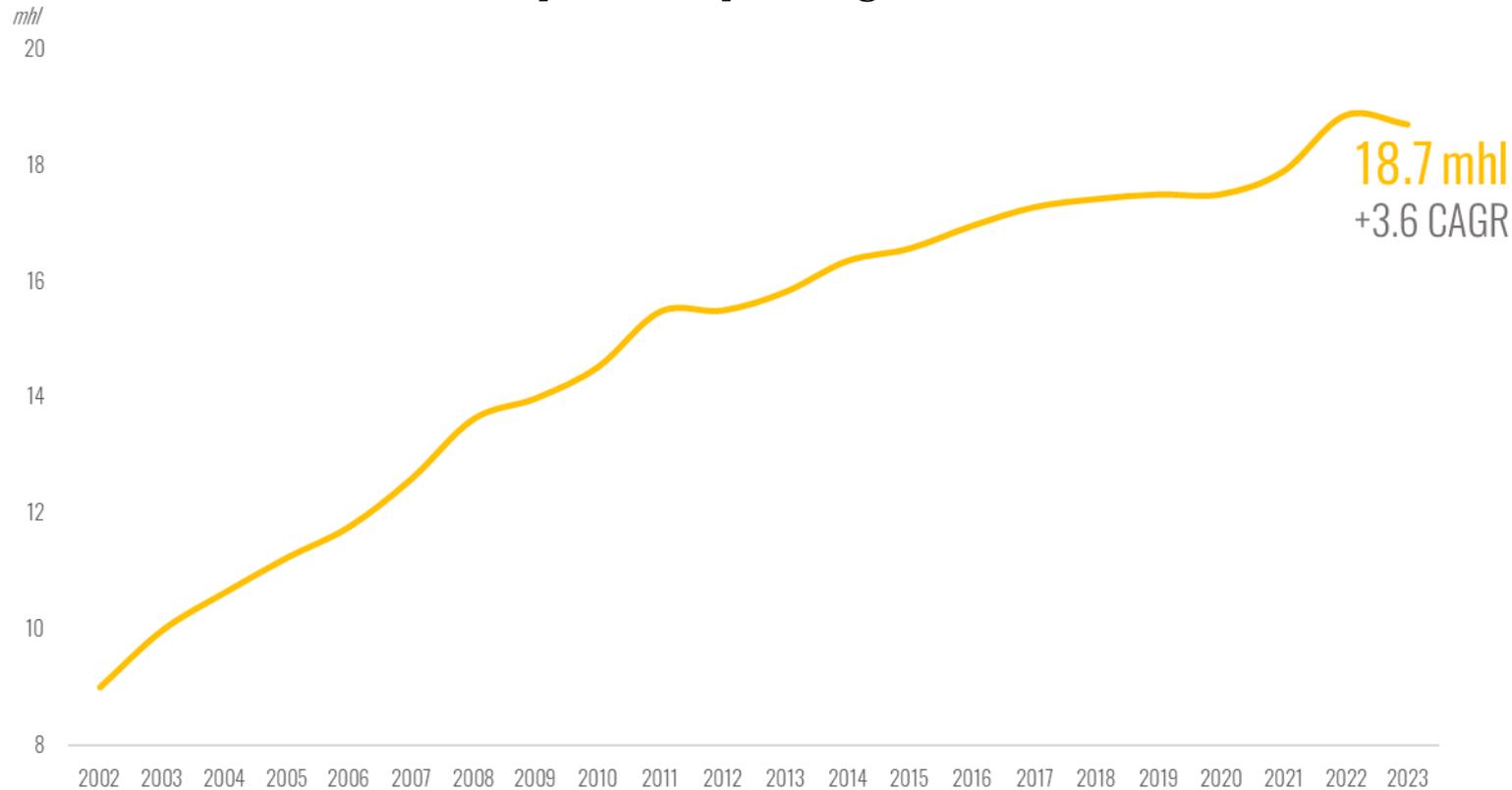
Wine Consumption

Evolution of global wine consumption by colour (mhl)

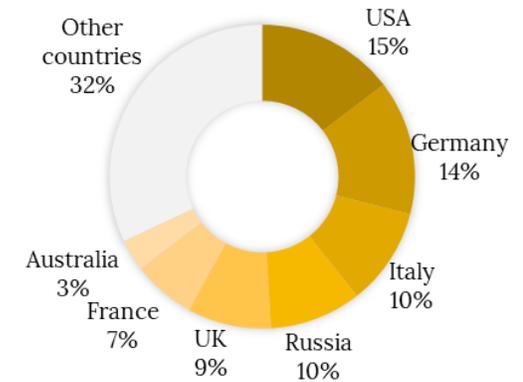


Wine Consumption

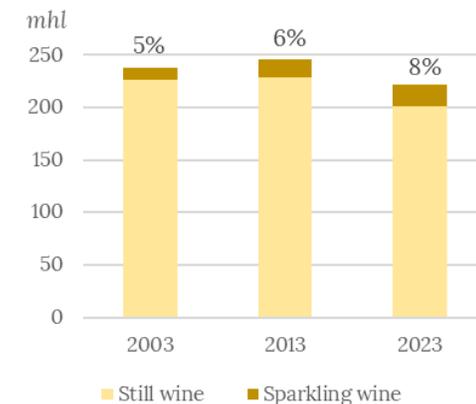
Evolution of world consumption of sparkling wine



Breakdown of sparkling wine consumption in 2023



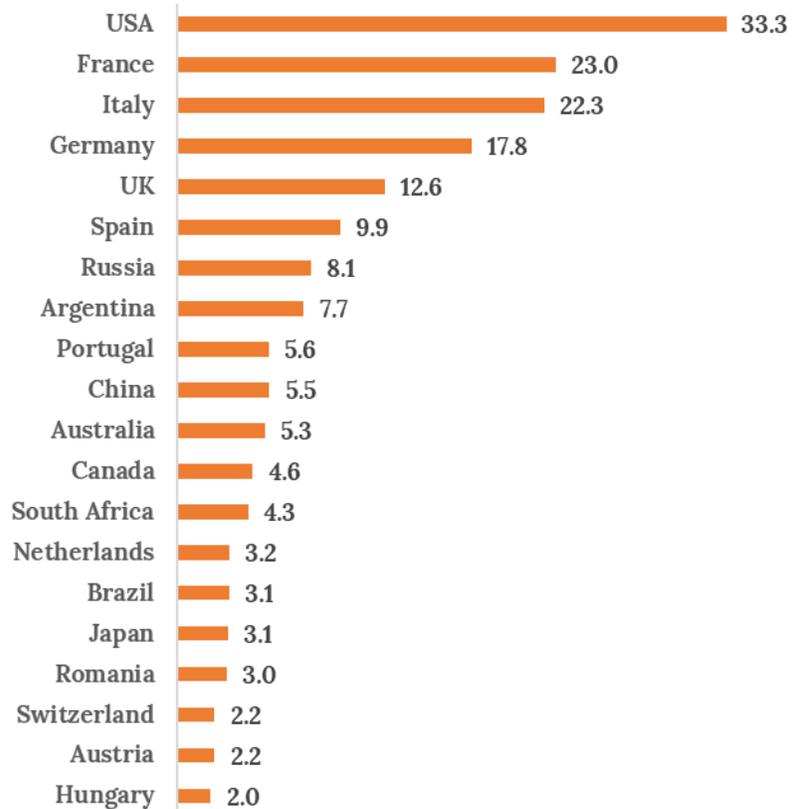
Share of sparkling wine in world wine consumption



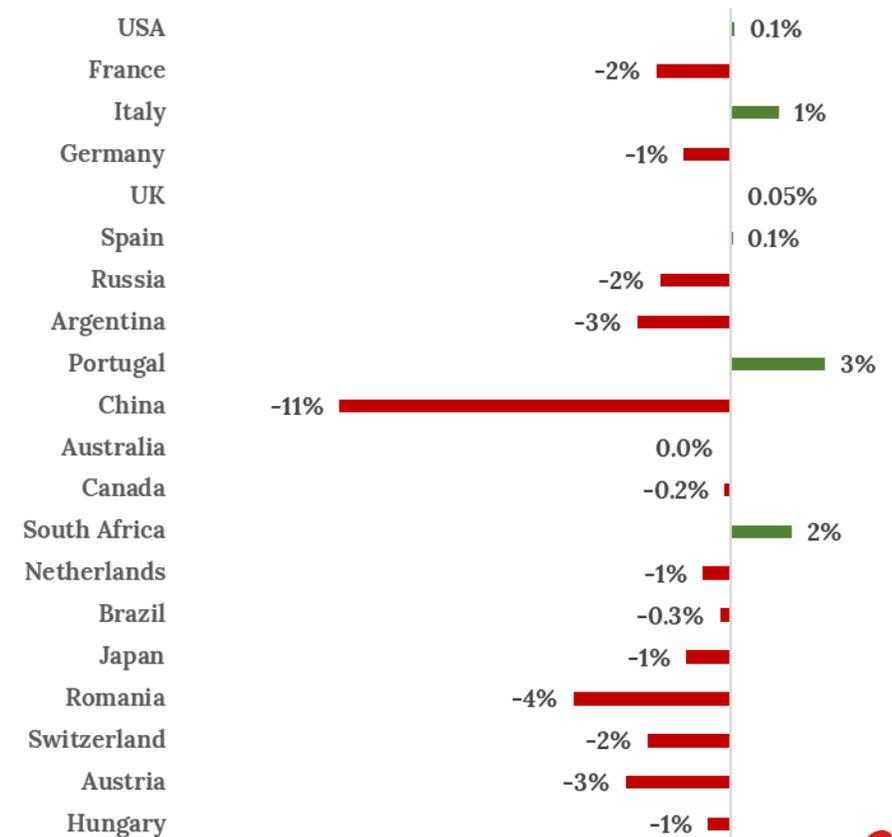
Wine Consumption

Major countries by total consumption in 2024

mhl



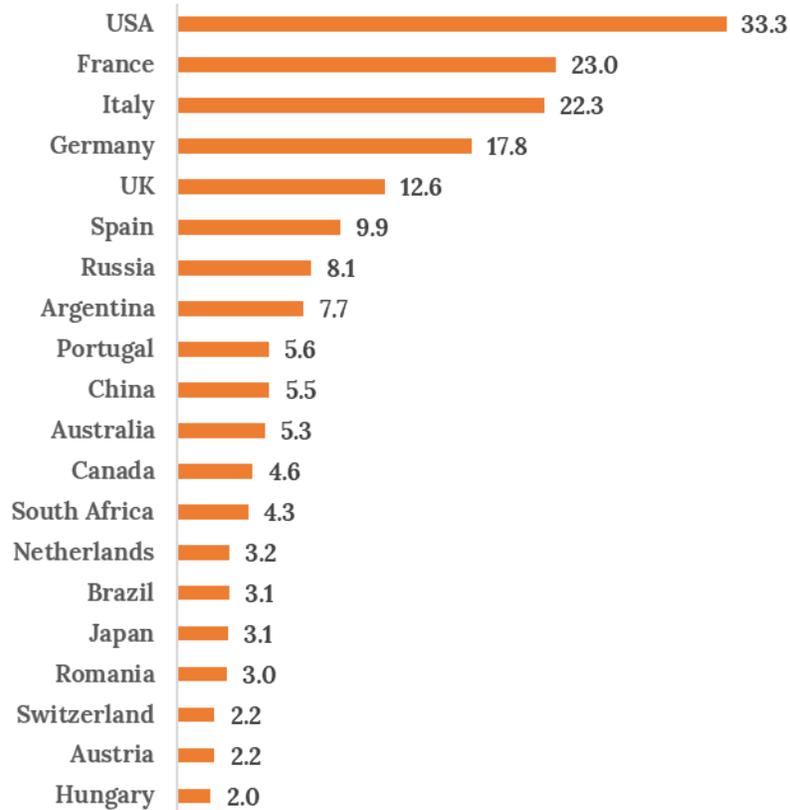
Variation of total consumption, 2014-2024 CAGR



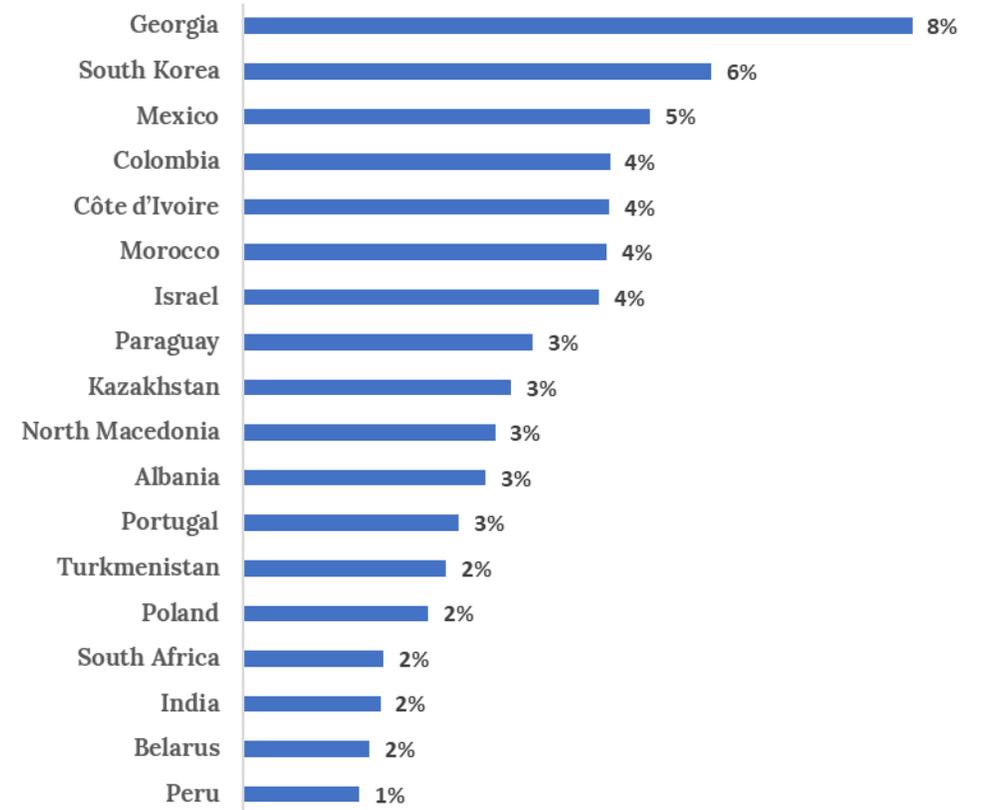
Wine Consumption

Major countries by total consumption in 2024

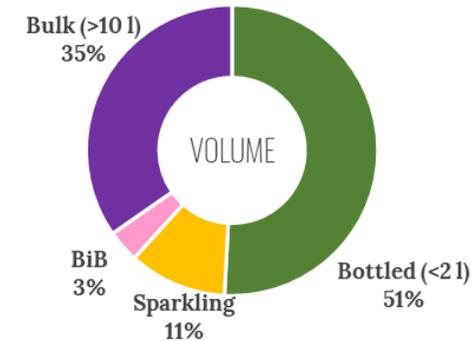
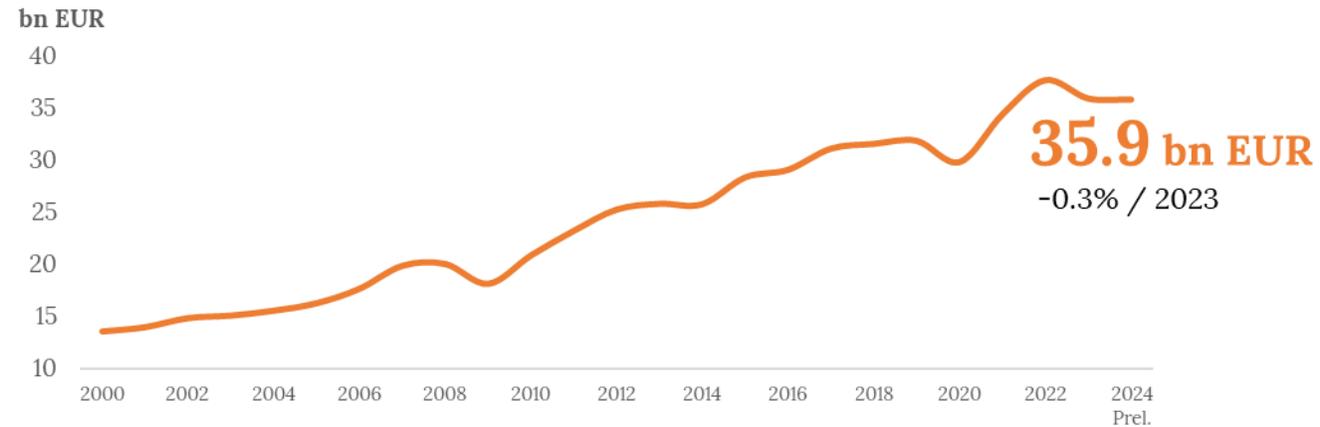
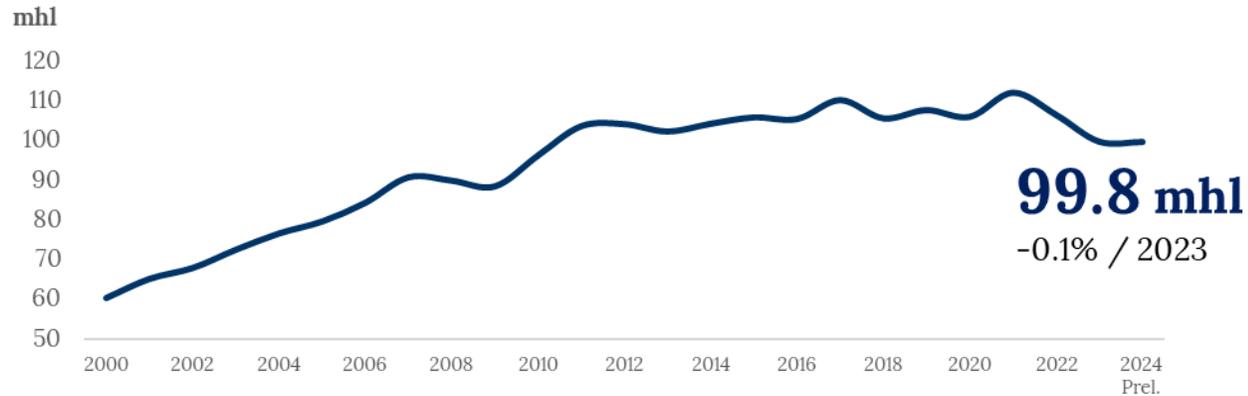
mhl



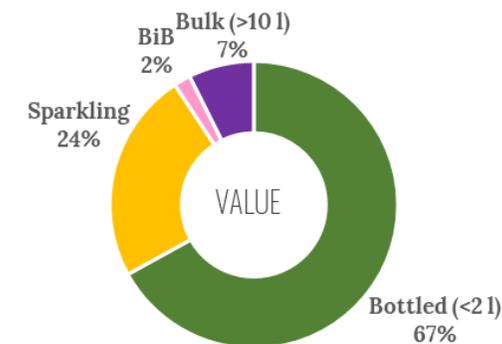
Growing markets by CAGR 2015-2024



International trade in Wine



**Slight contraction
in volume**

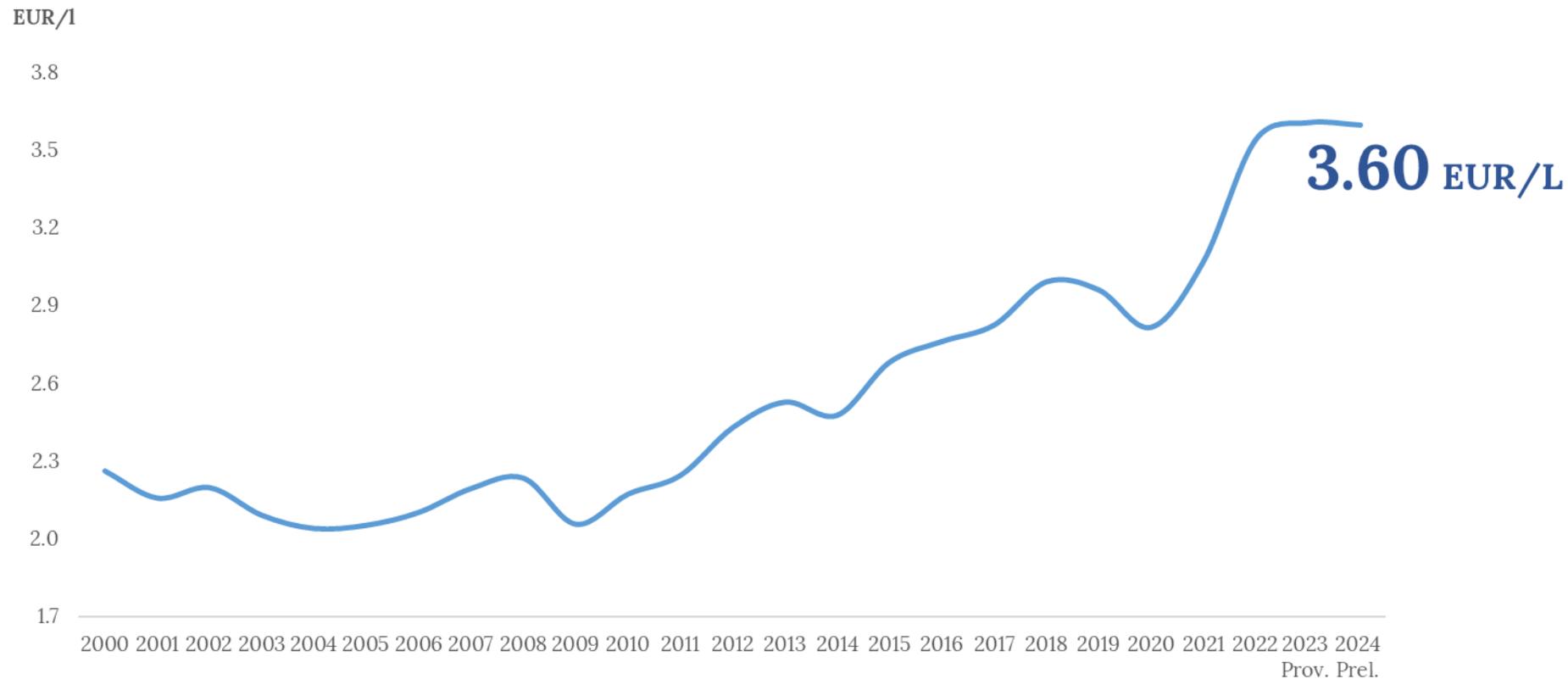


**3rd highest value
ever recorded**



Premiumisation

International trade in Wine



2nd highest recorded



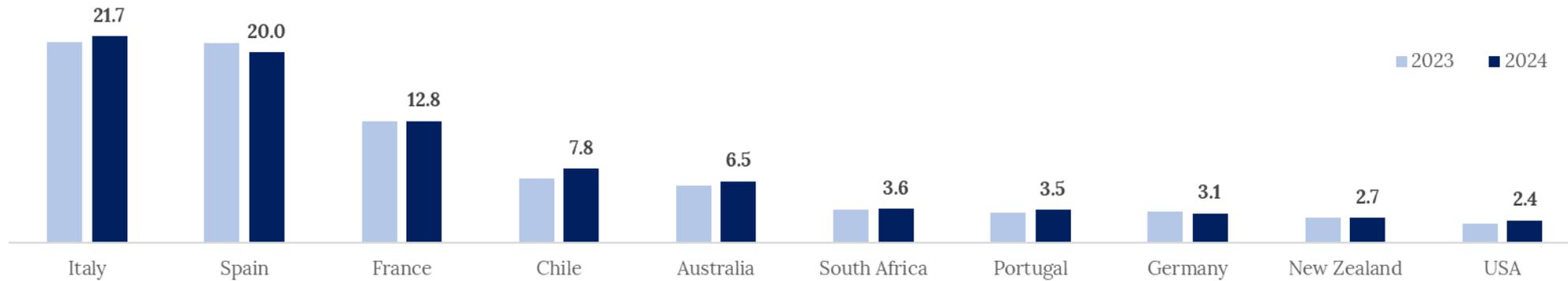
Inflationary pressures



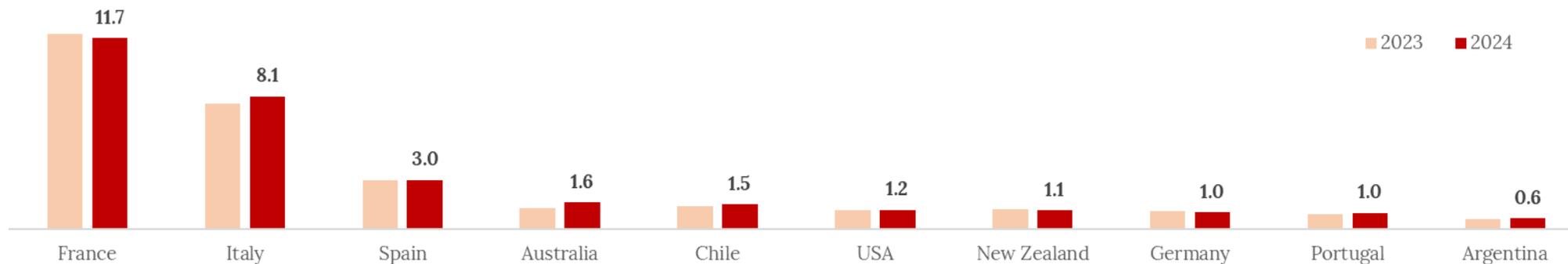
+30% / 2020

Top Exporters

Top 10 exporters by VOLUME (mhl)

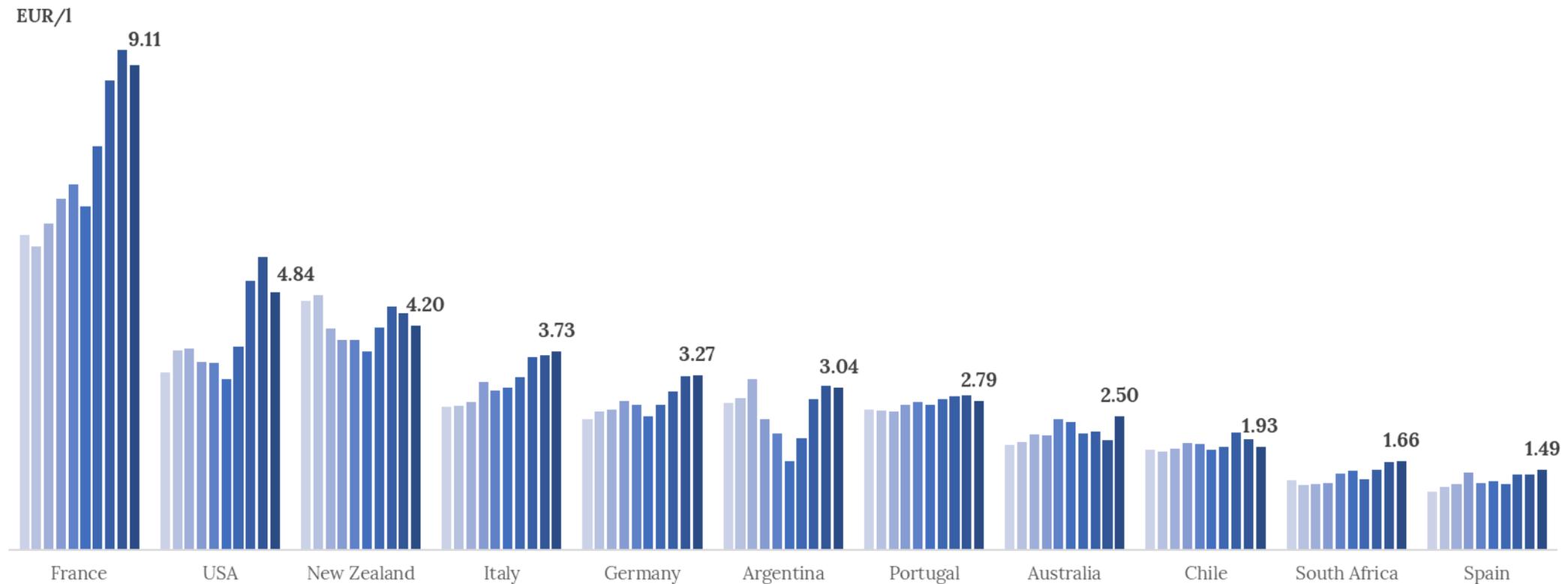


Top 10 exporters by VALUE (bn EUR)



Main Wine Exporters

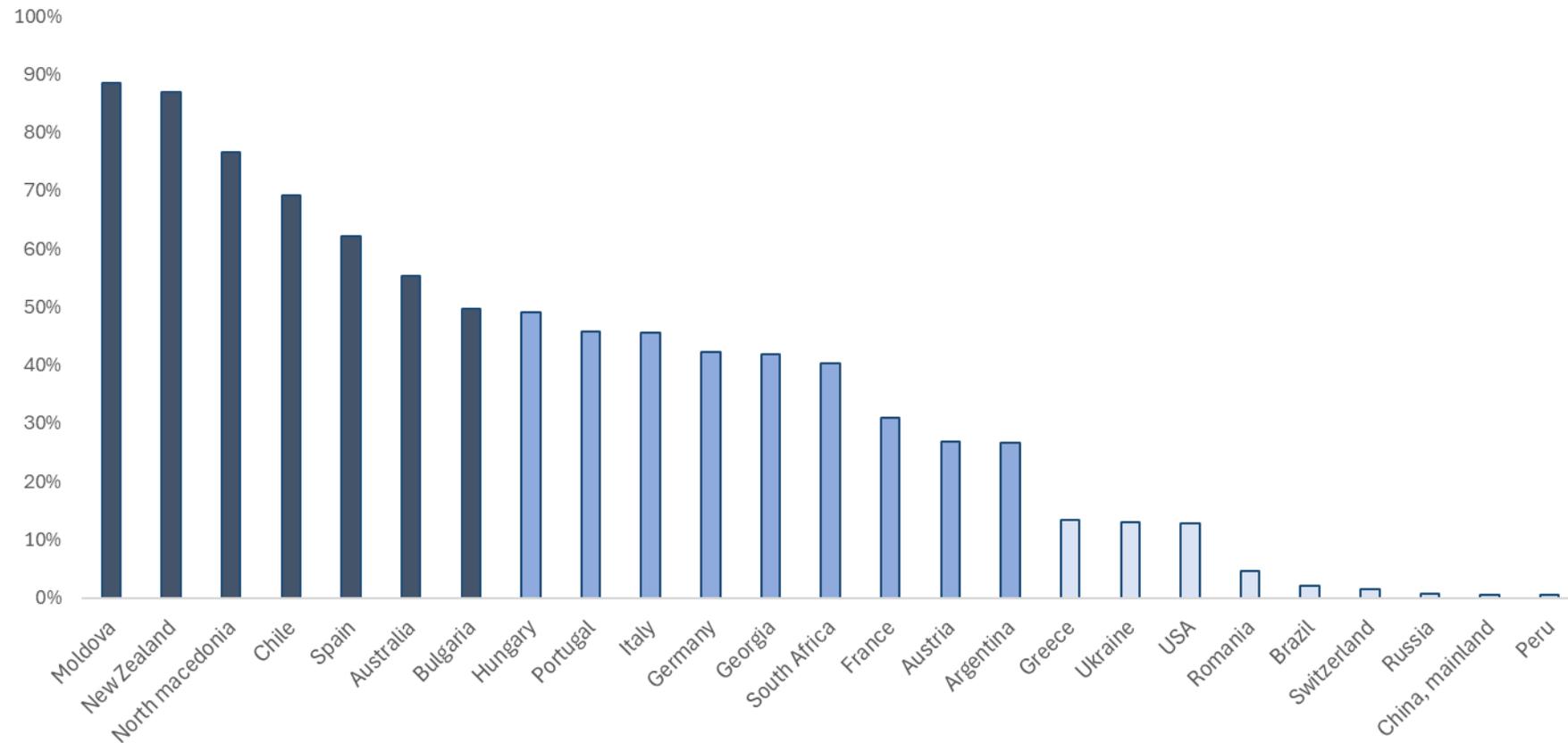
Major Exporters* by Average Export Price, 2015-2024



*Countries listed as top 10 exporters, by volume or value in 2024

Export Intensity Index

% Exports / Production (avg. 2020-2024)



1

Low intensity
<20%

2

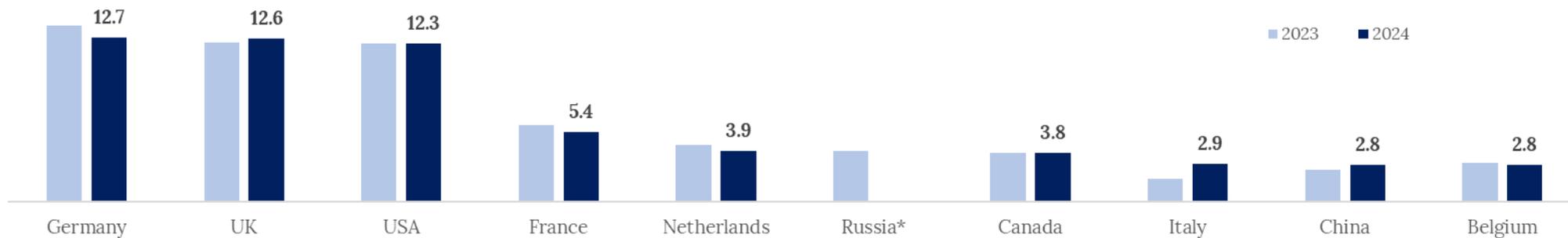
Balanced
20% - 50%

3

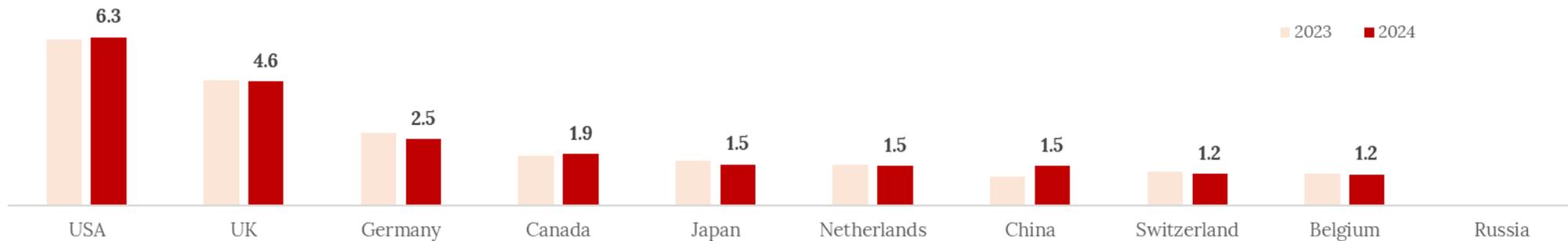
High intensity
>50%

Top Importers

Top 10 importers by VOLUME (mhl)

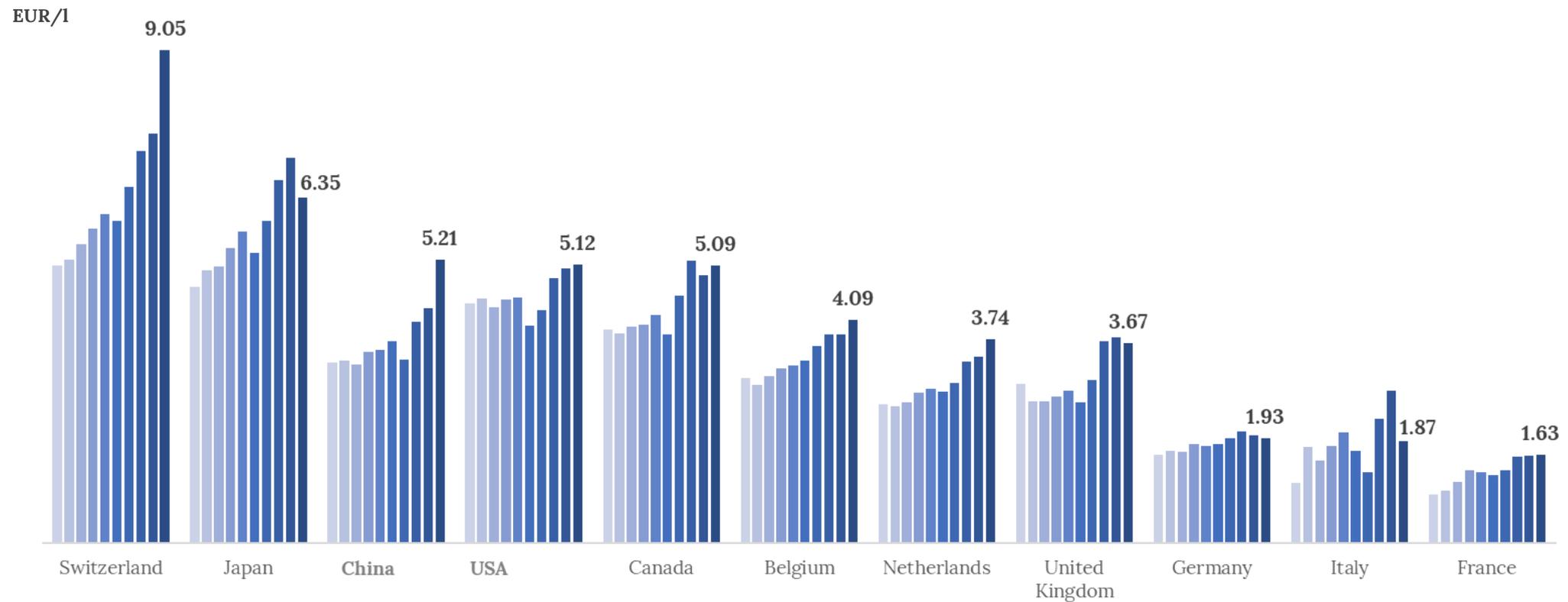


Top 10 importers by VALUE (bn EUR)



Main Wine Importers

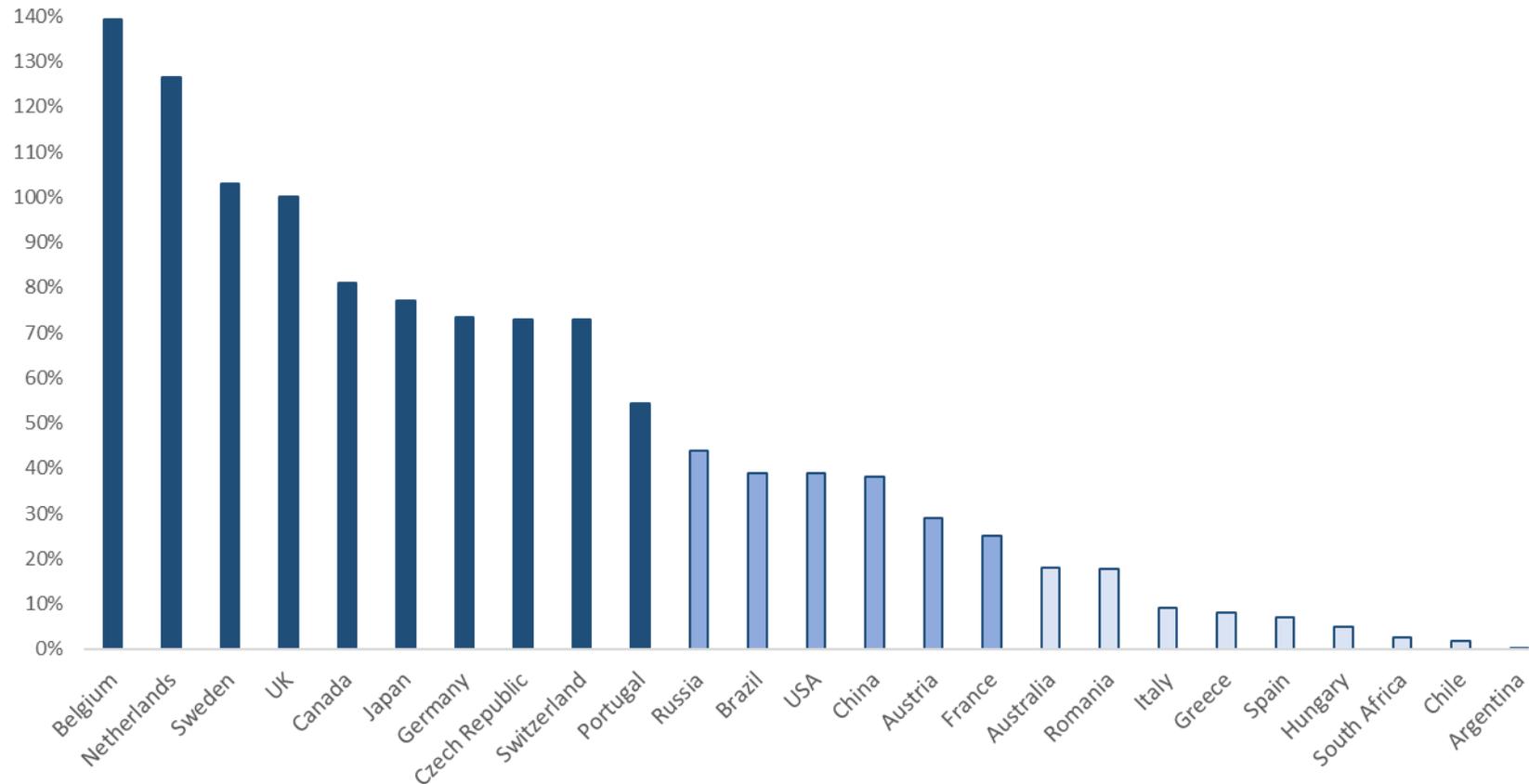
Major Exporters* by Average Import Price, 2015-2024



*Countries listed as top 10 importers, by volume or value in 2024 (data on Russia not available)

Import Intensity Index

% Imports / Consumption (avg. 2020-2024)



1

Low intensity
<20%

2

Balanced
20% - 50%

3

High intensity
>50%

4

Re-exporters
>100%

Global Re-exports of Wine

Key Figures
(avg. 2018-2023)

Volume
14 mhl

13.3%

Value
€4.6 bn

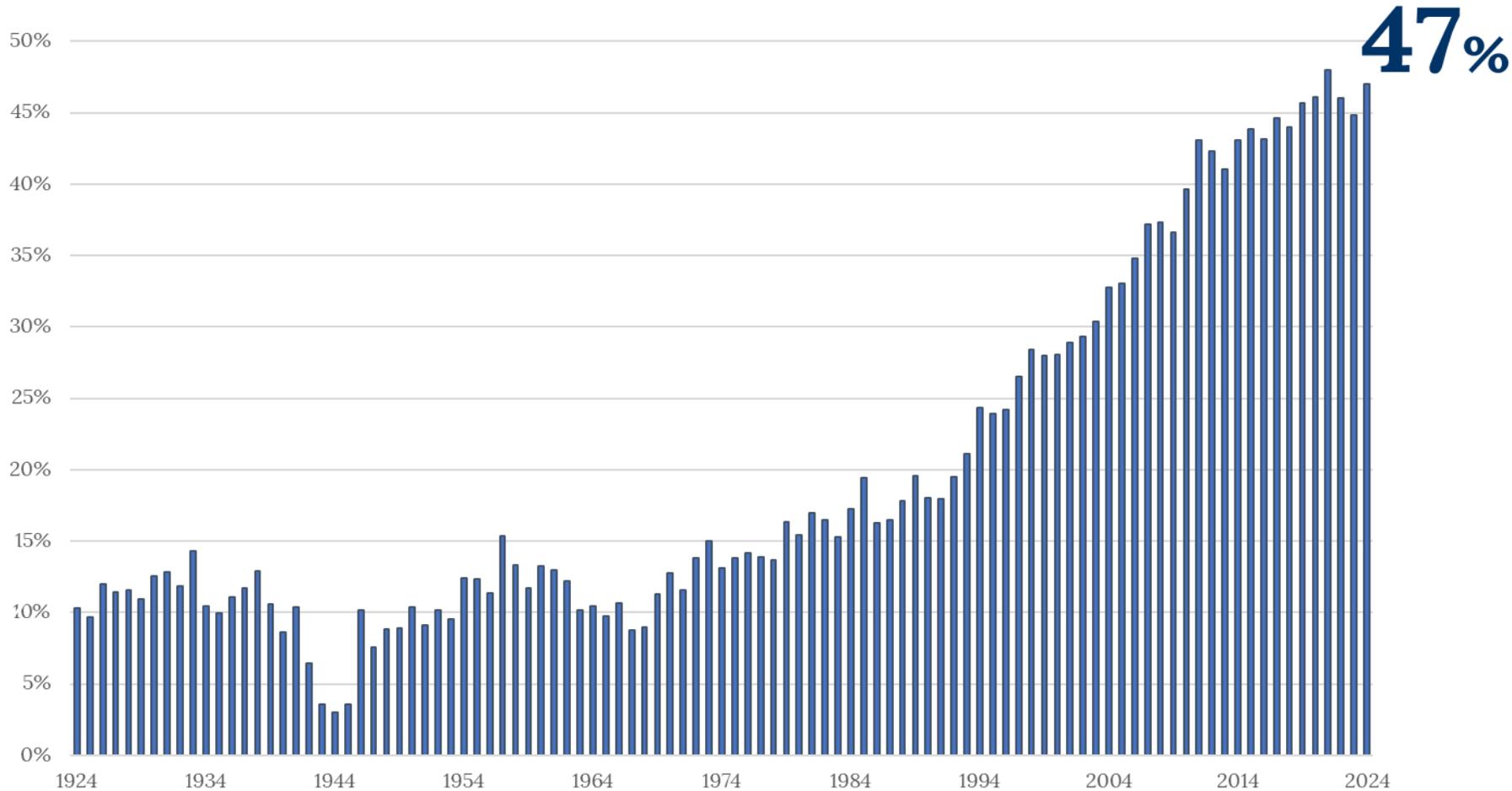
13.5%

Av. price
3.3 €/l



Scan to view
the full report

Market Internationalisation Index



+ 30% pts since 1990



Rules-based system



Highly globalised sector



International Organisation
of Vine and Wine
Intergovernmental Organisation

For more information:
<https://www.oiv.int/what-we-do/statistics>



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KEY FEATURES & EVOLUTION OF THE BULK WINE MARKET

Rafael DEL REY

Analysts of Wine Markets (AWM)

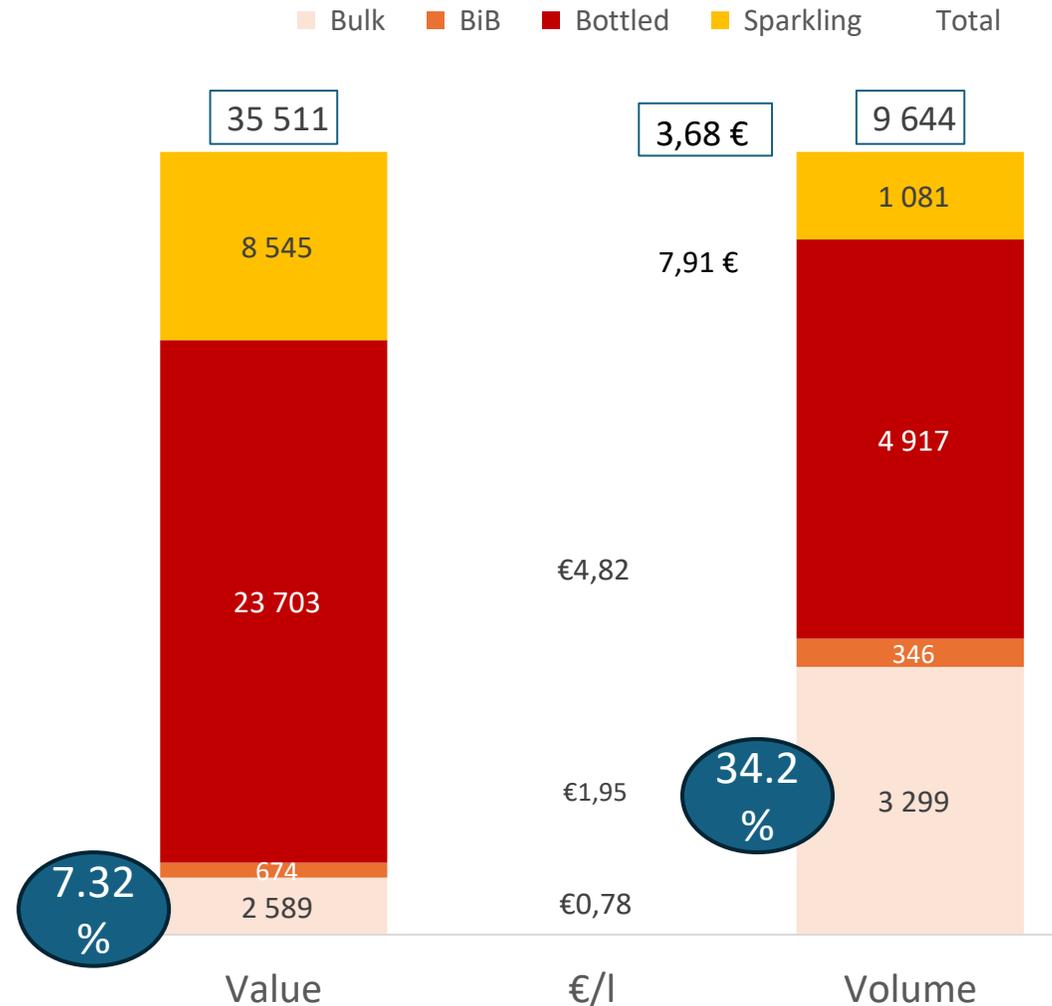
Del Rey
AWM

Bulk is a very relevant part of wine trade

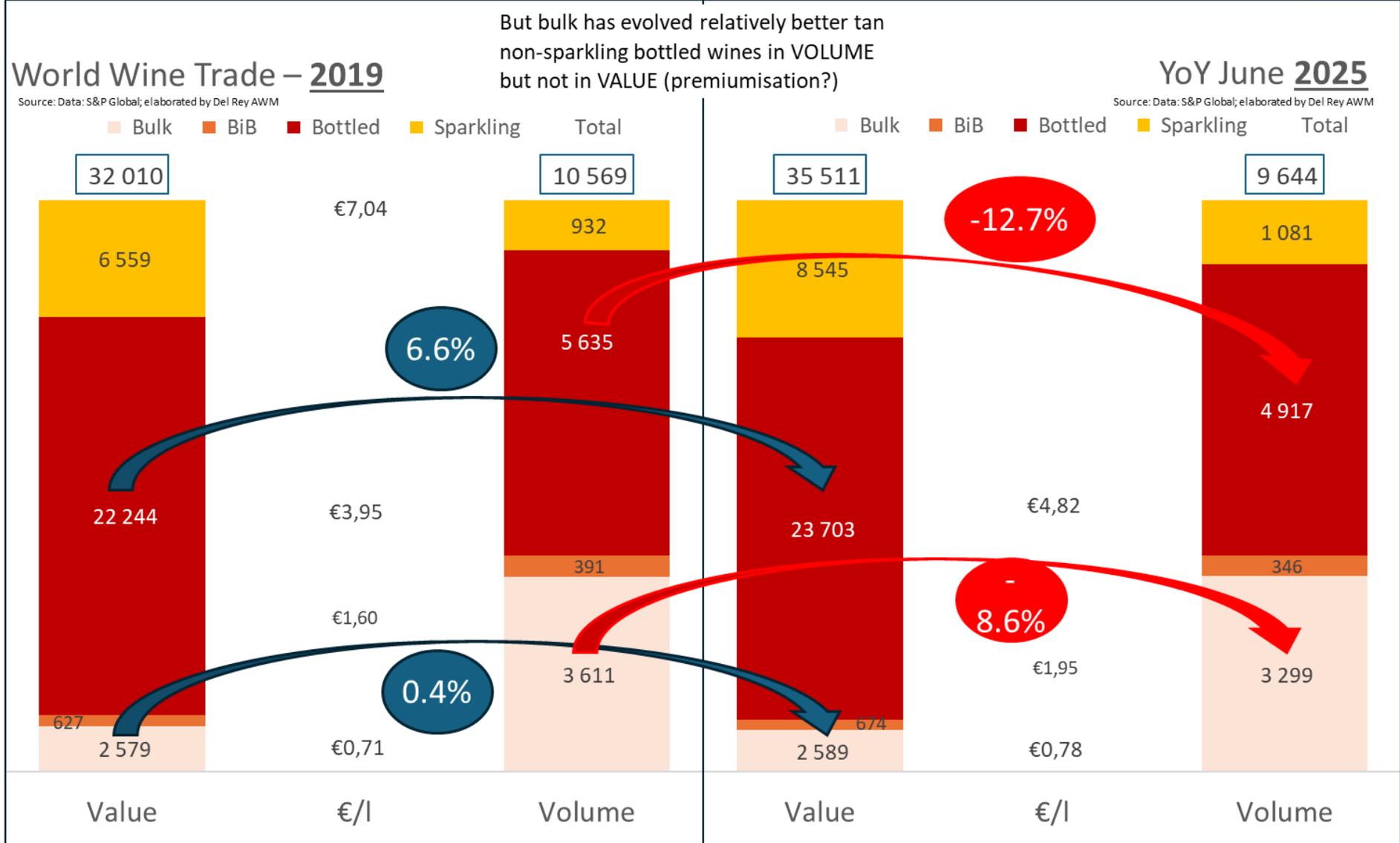
Bulk accounts for more than a third of total volume exported worldwide, although only 7.3% of total value, due to its lower average price - €0.78 per litre as compared to €1.95 for BiB and €4.82 per litre for non-sparkling bottled wines.

World Wine Trade – YoY June 2025

Source: Data: S&P Global; elaborated by Del Rey AWM



Evolving better than other categories



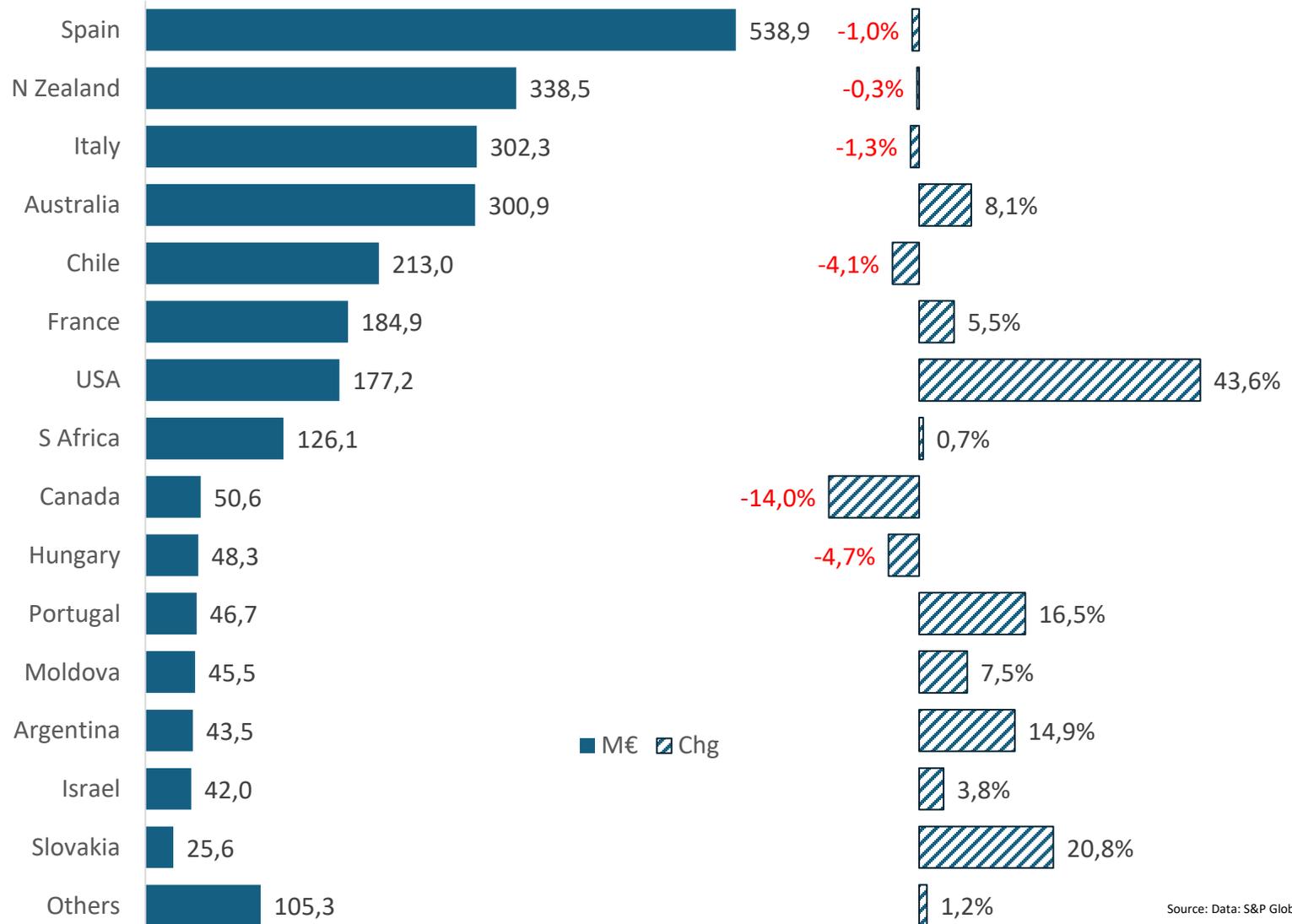
With top exporters.... (value)

... led by Spain in both value and volume, with New Zealand second in euros and Australia second in litres.

In value, top three including Italy decrease revenues this year (12-month to June), as opposed to Australia, France and more strongly USA and Portugal that show double-digit growth.

In the case of USA due to increase of 16% in sales to the UK (51% of total bulk exports), doubling shipments to Denmark and Canada and multiplying by 10 exports to China.

TOP EXPORTERS OF WINES IN BULK - VALUE – YoY June 2025



Source: Data: S&P Global; elaborated by Del Rey AWM

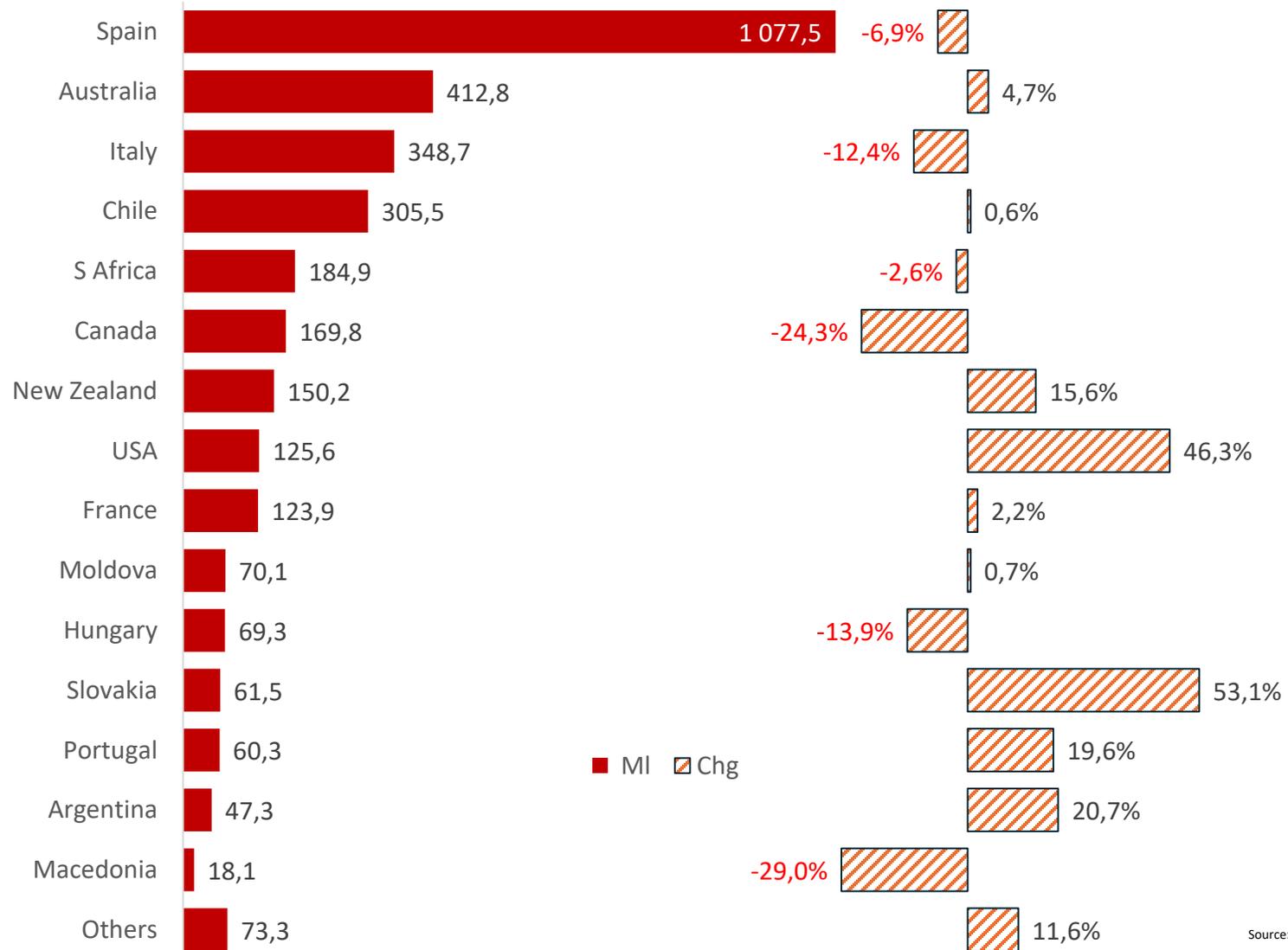


With top exporters.... (volume)

In volume, the leadership of Spain is more evident, selling one third of total world exports in bulk (10.8 M hl) despite decreasing in recent months.

Australia's recovered shipments to China, US's growing sales to UK, Germany, France, Canada, Denmark and Japan, as well as Slovakia's increasing exports to the Czech Republic are outstanding in this period. In the negative side, Canada losses one quarter of its shipments to the US.

TOP EXPORTERS OF WINES IN BULK - **VOLUME** – YoY June 2025



Source: Data: S&P Global; elaborated by Del Rey AWM



With top exporters.... (average price)

Average prices for bulk exports differ strongly from country to country, showing a first hint of different markets within bulk trade.

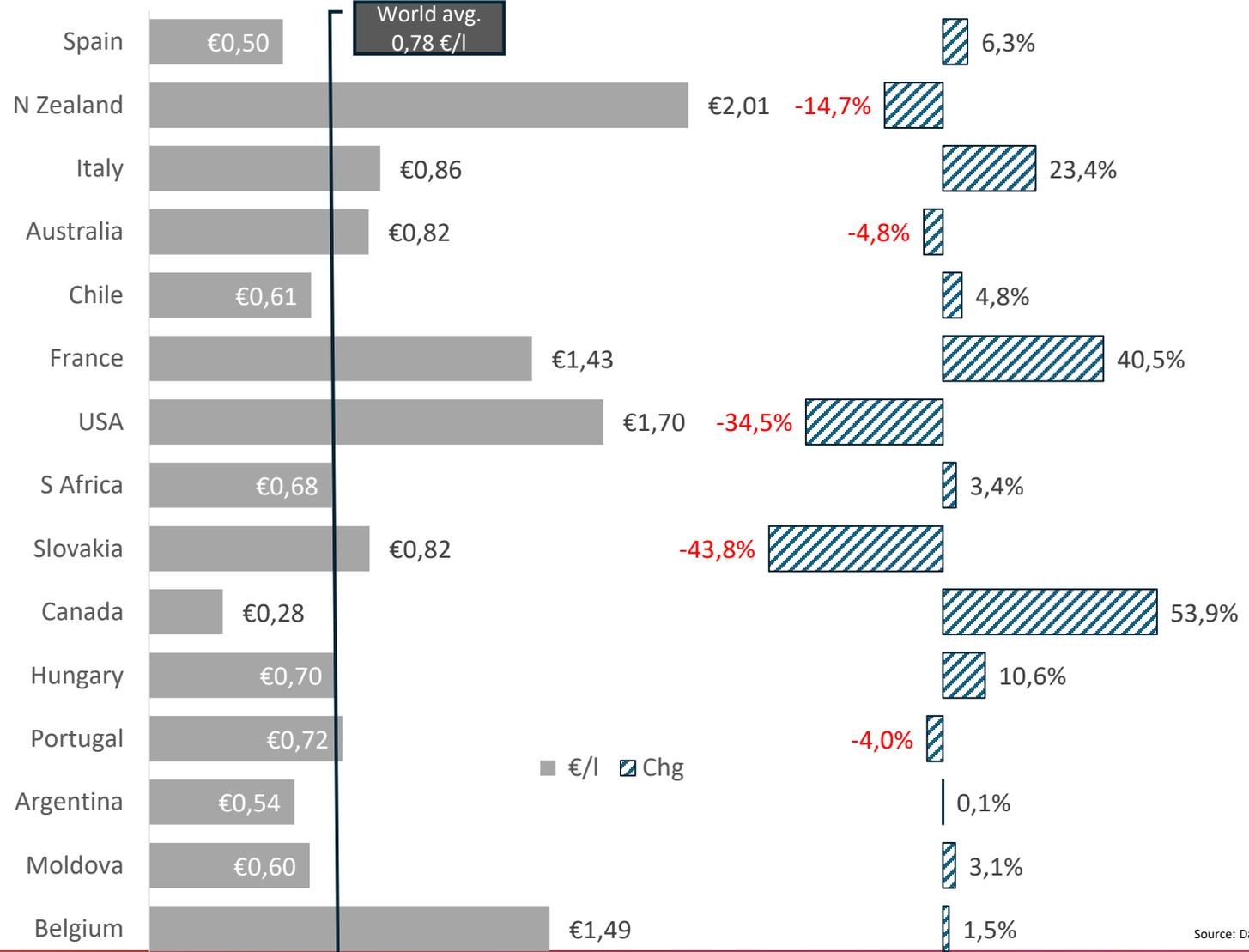
Well below world average are Spain, whose larger sales are made to Germany, France and Italy, and Canada, selling basically to the USA.

Also below average are Chile, South Africa, Hungary, Portugal, Argentina and Moldova.

Above world average are New Zealand, Italy, Australia, France, the US and Belgium.

Prices for Italian and French bulk exports grow sharply this year led by decreasing availability of wine.

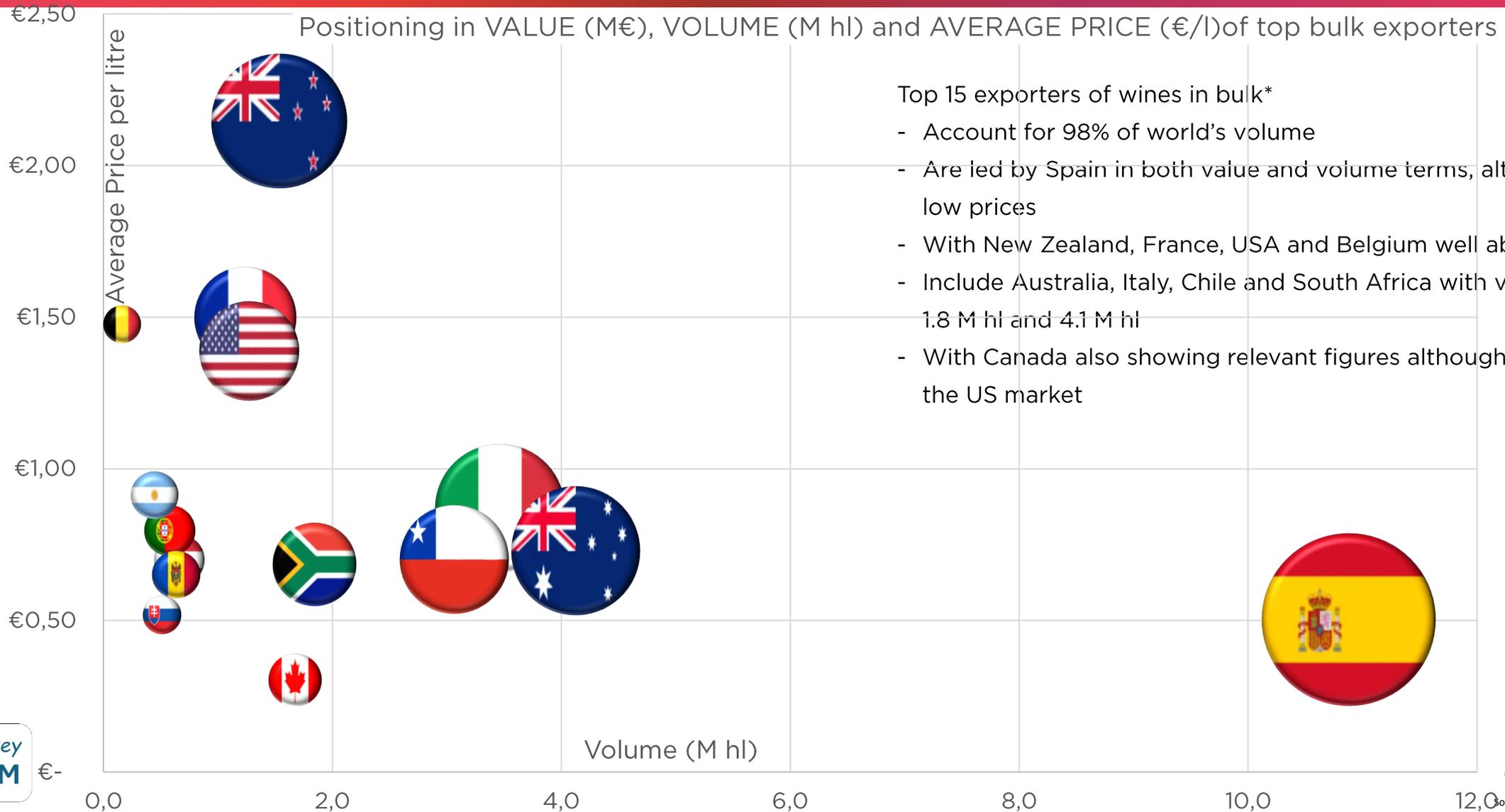
TOP EXPORTERS OF WINES IN BULK – AVERAGE PRICE – YoY June 2025



Source: Data: S&P Global; elaborated by Del Rey AWM



With top exporters.... (positioning)



- Top 15 exporters of wines in bulk*
- Account for 98% of world's volume
 - Are led by Spain in both value and volume terms, although at quite low prices
 - With New Zealand, France, USA and Belgium well above 1 € per litre
 - Include Australia, Italy, Chile and South Africa with volumes between 1.8 M hl and 4.1 M hl
 - With Canada also showing relevant figures although concentrated in the US market

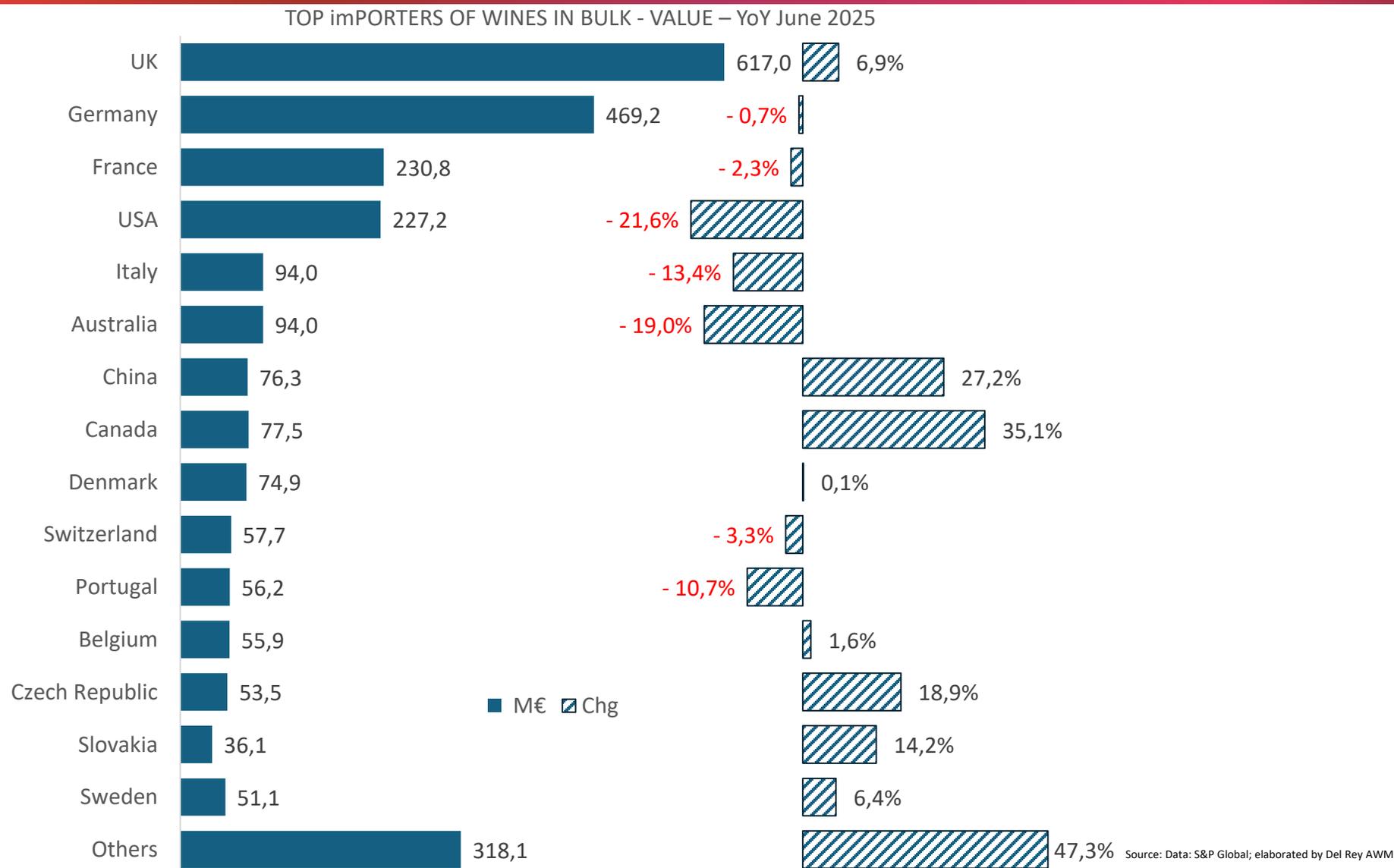
* Excluding Israel for not showing data in volume
Source: Data: S&P Global; elaborated by Del Rey AWM



With top importers.... (value)

Top markets for wines in bulk are more diversified than exporters. However, UK, Germany, France and USA account for more than half of total imports in value, with Italy, Australia, China, Canada and Denmark also showing import figures between 70 and 100 million euros.

Among them, this year the UK increases imports, particularly from Australia, New Zealand and South Africa, Germany and France decrease their purchase slightly and less than the double-digit decrease in USA, Italy and Australia, while China and Canada grow sharply.



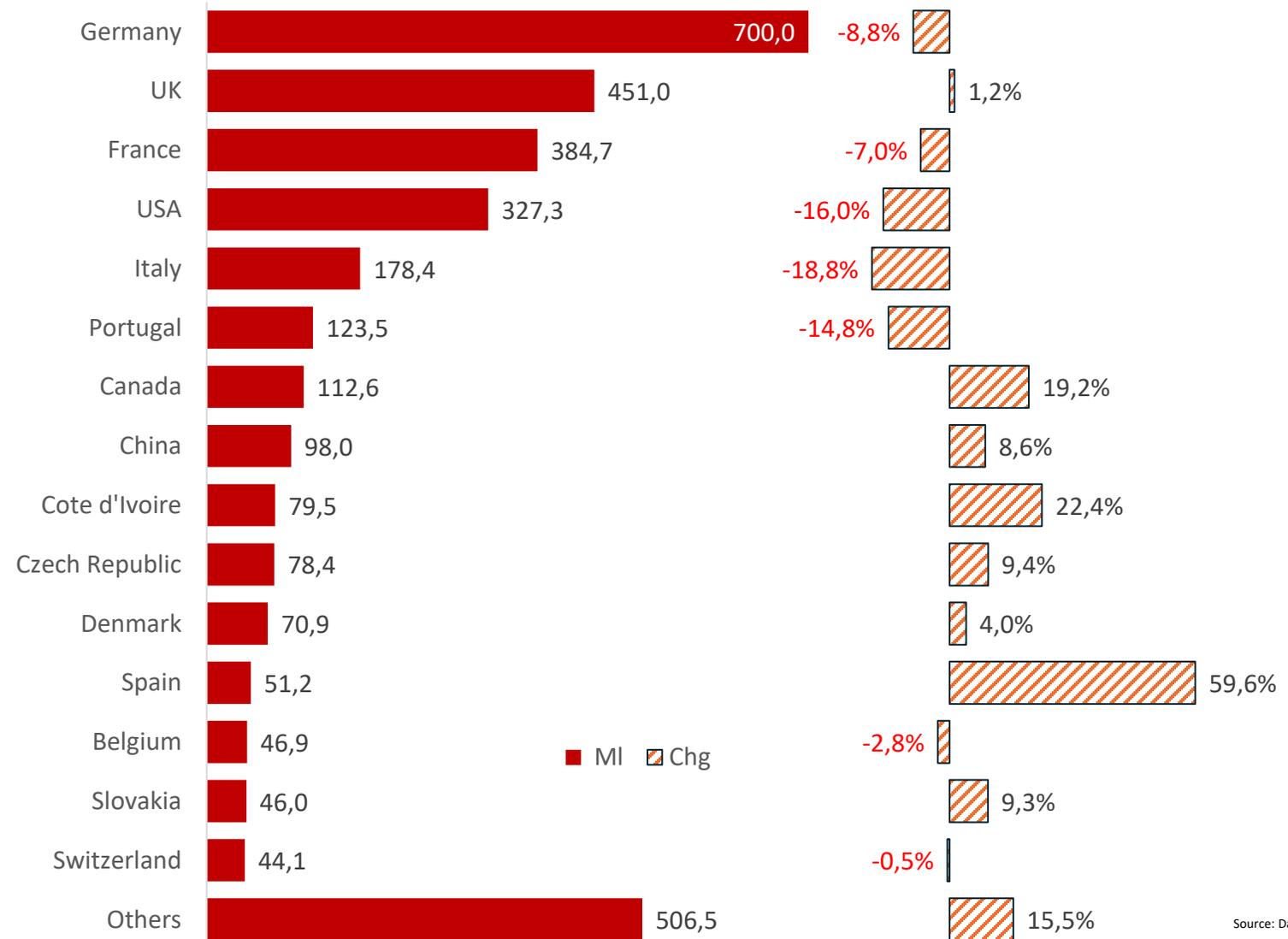
With top importers.... (volume)

By volume, some relevant importers decreased purchase of wines in bulk this year, including Germany, France, USA, Italy and Portugal; most of them also wine producers facing challenging markets for their own wine.

However, other important markets such as Canada, China, the Czech republic, Denmark and Slovakia show positive figures.

Ivory Coast ranks now ninth among world top importers of wines in bulk and Spain increased imports by almost 60% particularly from Chile and Portugal, probably due to its low harvest.

TOP IMPORTERS OF WINES IN BULK - **VOLUME** – YoY June 2025



Source: Data: S&P Global; elaborated by Del Rey AWM



With top importers.... (average price)

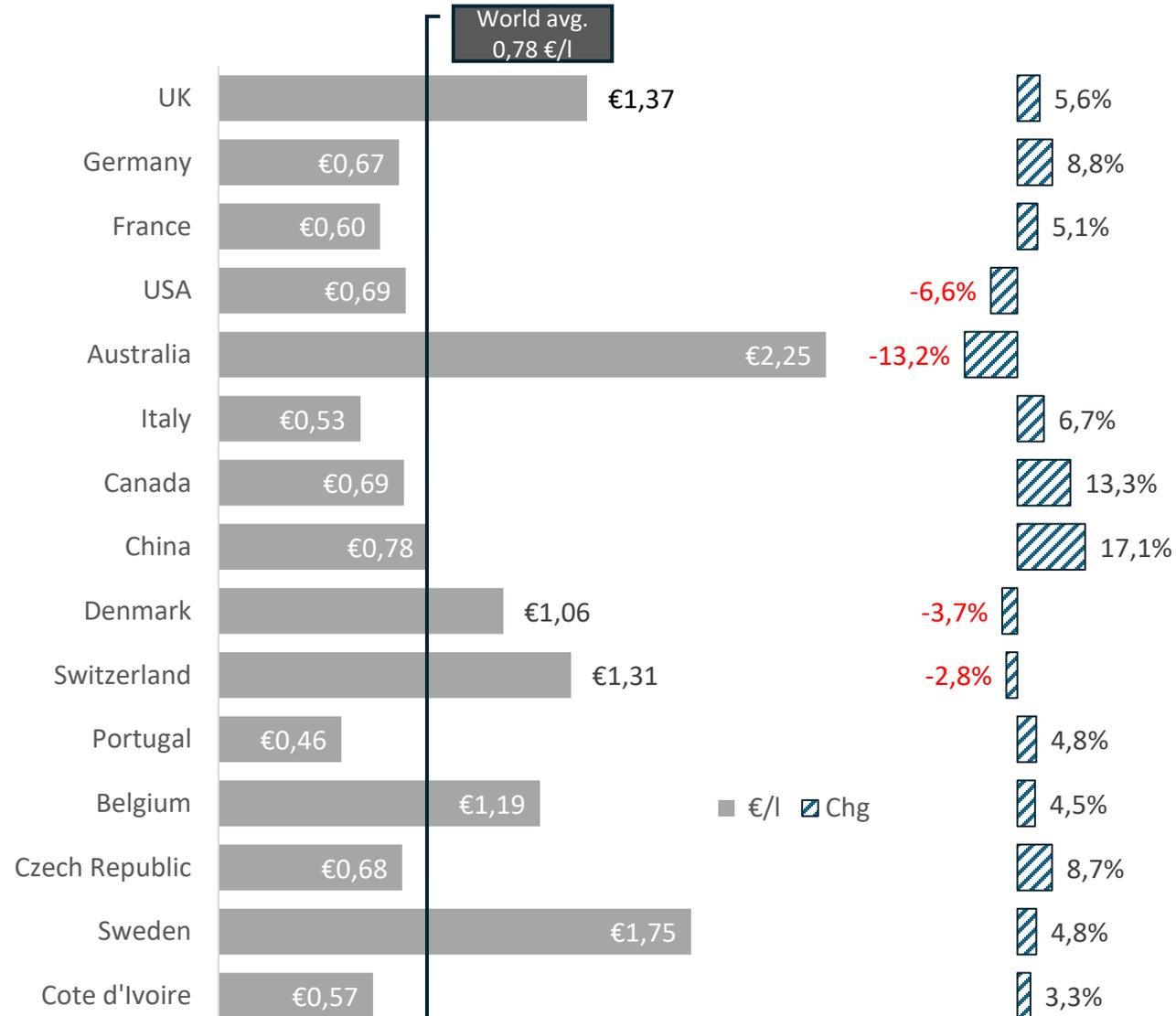
As in the case of top exporters, average price in key markets for wines in bulk also show different potential segments and uses.

UK, Denmark, Switzerland, Belgium and Sweden, among top importers seem to import wines in bulk for local bottling and distribution, sowing prices above 1 euro per liter.

Around 90% of total wine imports in bulk in Australia come from New Zealand, mostly to be re-exported to other destinations (UK and USA), at relatively high prices.

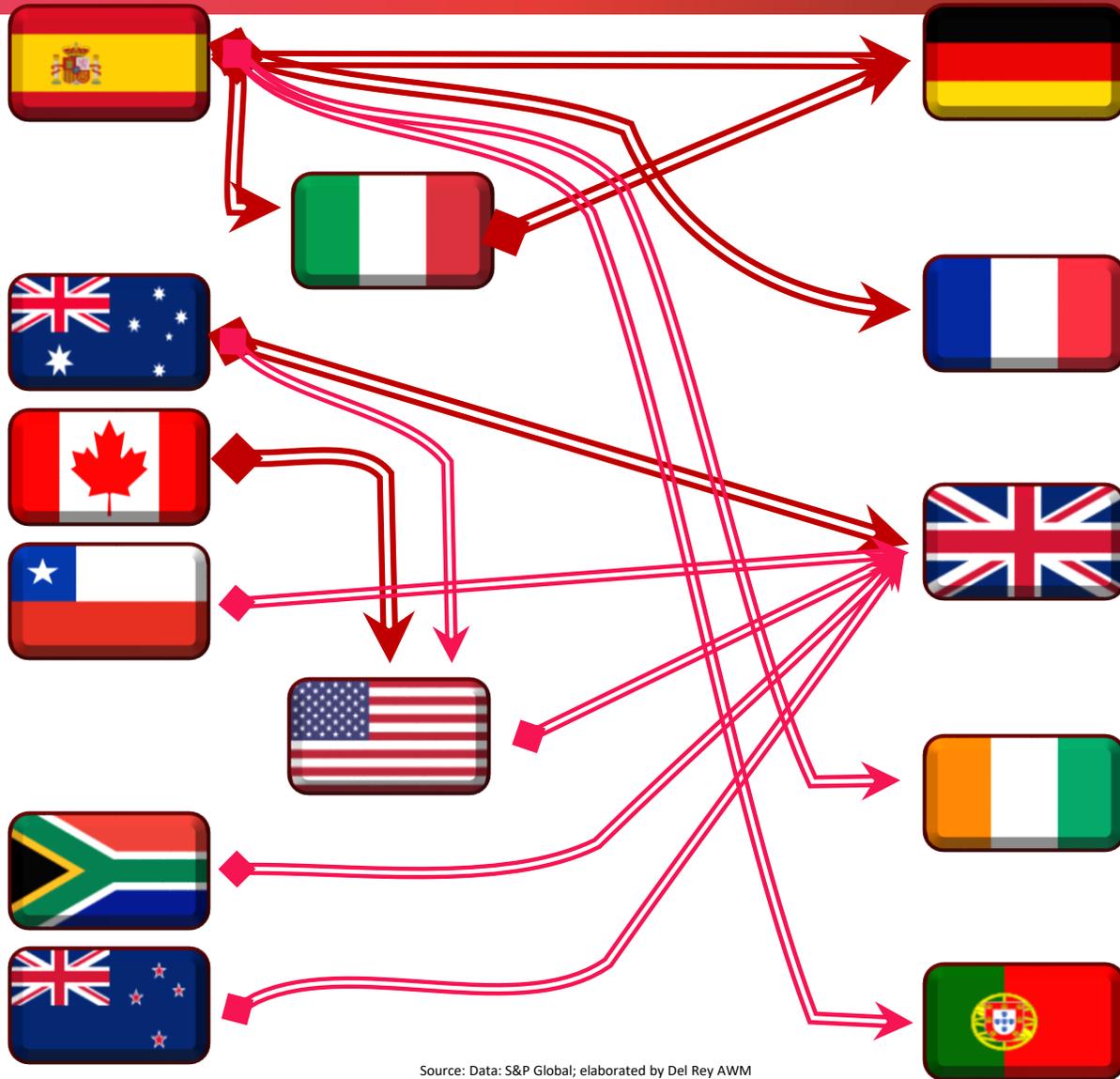
Other top destinations import wines in bulk at lower prices either to be used as part of their elaboration processes or to supply lower segments of their own markets (domestic and international).

TOP IMPORTERS OF WINES IN BULK – AVERAGE PRICE – YoY June 2025



Source: Data: S&P Global; elaborated by Del Rey AWM

Top flows



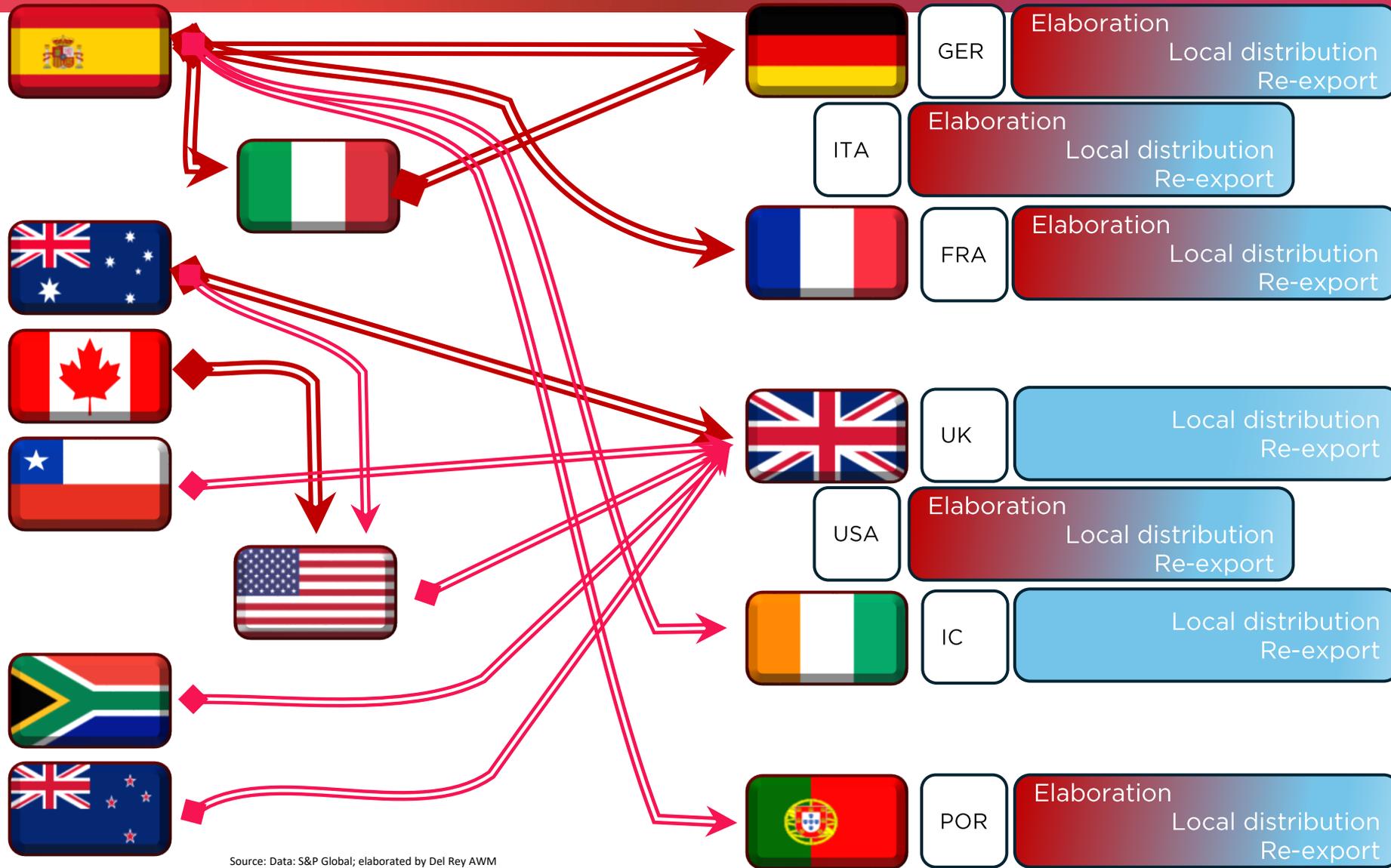
Source: Data: S&P Global; elaborated by Del Rey AWM

Top flows in volume, above 0.5 M hl in 12 months up to June 2025 are:

	FROM	TO	000 hl
1	Spain	Germany	3,172
2	Spain	France	3,156
3	Italy	Germany	2,021
4	Australia	UK	1,796
5	Canada	USA	1,676
6	Spain	Italy	1,159
7	Spain	Ivory Coast	779
8	Spain	Portugal	767
9	Chile	UK	681
10	Australia	USA	646
11	USA	UK	632
12	South África	UK	574
13	New Zealand	UK	508

Top flows

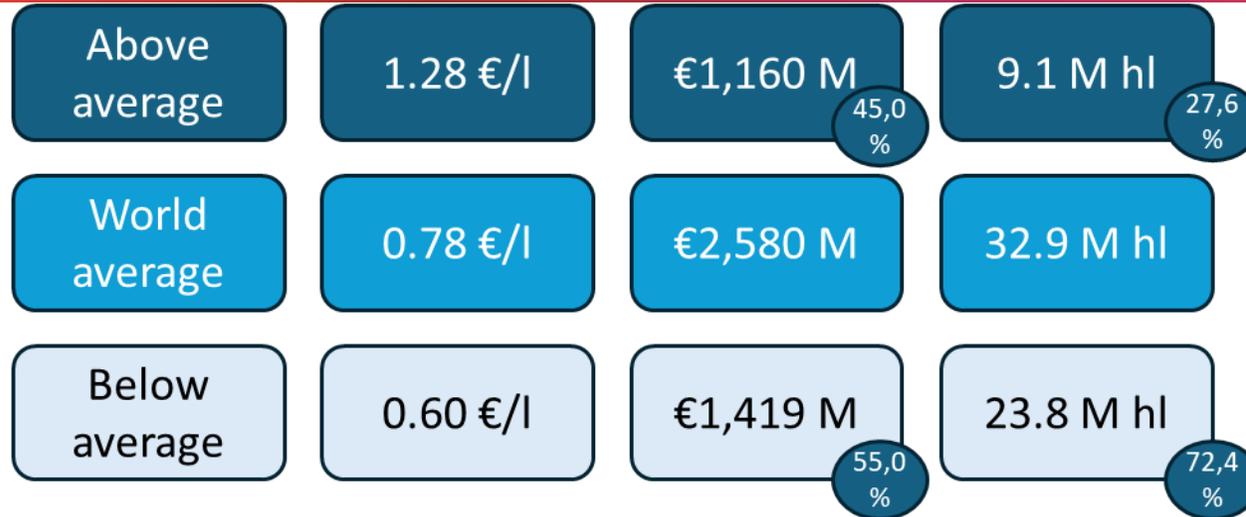
What do they do with this wine is not easy to know:



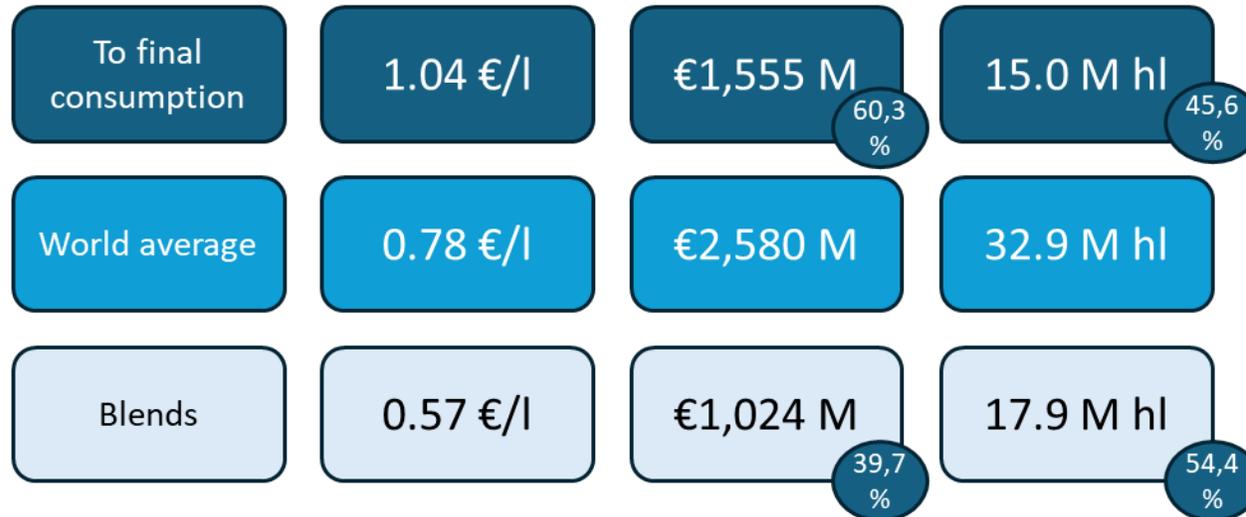
Source: Data: S&P Global; elaborated by Del Rey AWM

World bulk segmentation

Different bulk markets that can be segmented by price...



... or by most likely use at destination



Bulk wine exported by:

- Spain
- Italy
- South Africa
- Canada



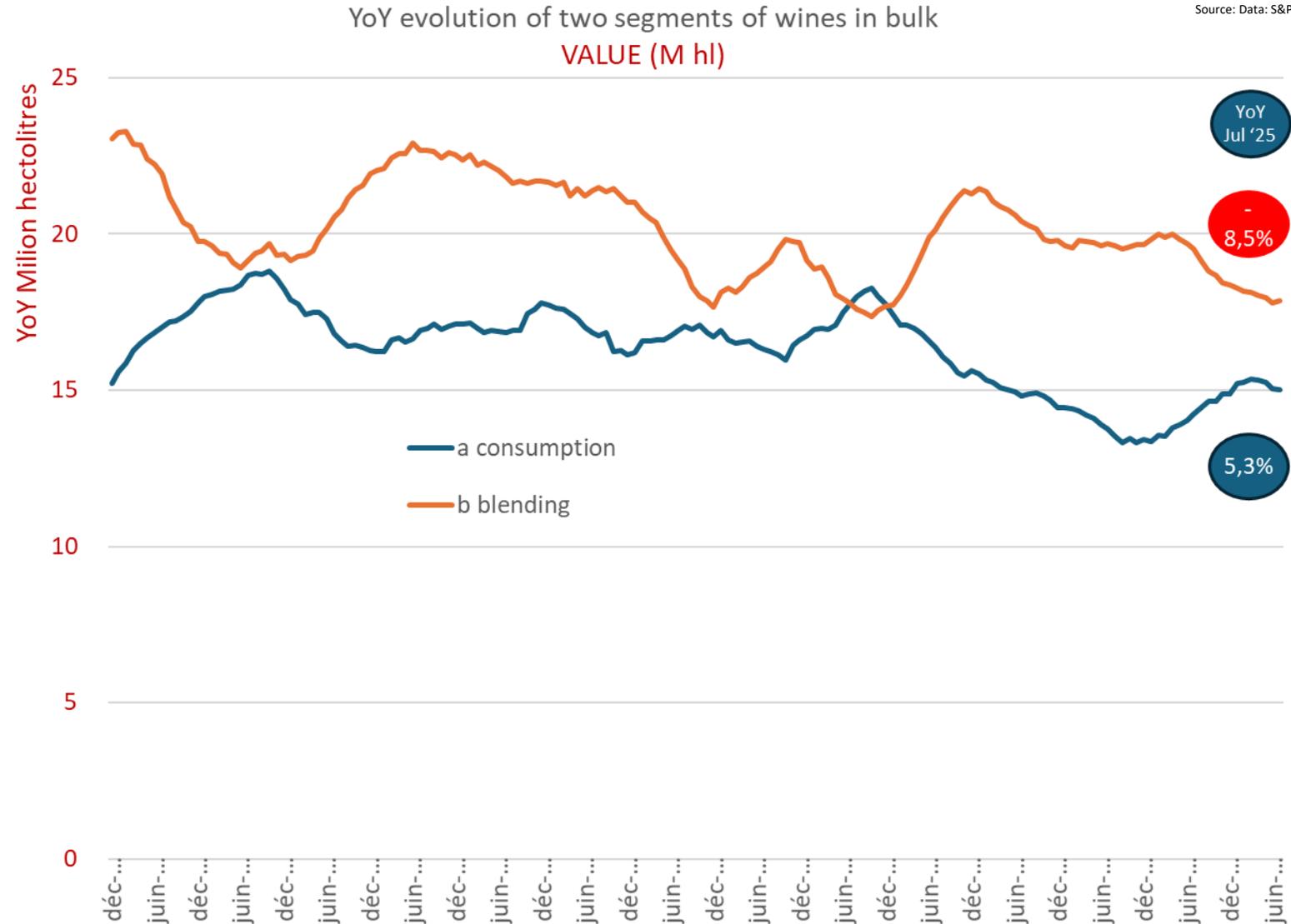
Source: Data: S&P Global; elaborated by Del Rey AWM

World bulk segmentation

Source: Data: S&P Global; elaborated by Del Rey AWM

Two segments of the bulk market that:

- Move around 50% of the market each
- Evolved with similar but opposite fluctuations
- With wines for potential blending decreasing in the 12-month period to July 2025, while wines to final distribution and consumption increasing in volume (5.3% and value (3.6%))



Different bulk markets with different characteristics

Bulk wine to final consumption:

- Particularly profitable for long distances (if bottling costs do not offset savings in transport)
- At higher average prices, although with great diversity
- Linked to bottling facilities at destination (distributors and or retailers → private label)
- For domestic distribution and re-export (UK, Germany)
- A minority in volume terms (45.6%) but majority in value (aprox. 60%)

Bulk wine among producers:

- Mostly within Europe
- Depending on
 - Availability of own crops
 - Evolution of the importer's markets
- Looking for
 - basic wines for blending (colour, alc degree...)
 - also particular varieties
- Strong competition on price

... and potential different future:

- Potential growth for both economic and environmental reasons
- Including premium and entry-level wines
- Improving technical means to secure quality transportation
- Threatened by decreasing consumption of traditional wines

- Spain keeping as clear leader
- Growth based on:
 - Importers' distribution capacity
 - Development of new products requiring basic wine (cocktails)
- Future depending on producers' own distribution capacity → improving → lower volume

In a framework of reducing consumption & trade

DISTRIBUTION IS KEY

Distributio
n capacity



Productio
n capacity

It is easier to find required wine than good clients

Bulk will also be affected by changes of consumers' trends:

- Challenging distribution of traditional reds
- Potential increase for whites, fresher and sweeter wines
- Strong development foreseen for base-wine for cocktails

In the short run, bulk trade among producers, in volume and prices, will depend on different availability / crops in different countries

In the long run, all producers tend to improve profitability,

- either by moving to bottled wines (e.g. Italy)
- or by finding direct roads to the clients' markets

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