

EU exports of white wines continue to perform better than reds – Varietal & PDO whites better than other categories

January 22, 2026

According to figures published by official sources and compiled by S&P Global, with analysis from del Rey AWM, total exports of still bottled wines from EU countries fell to €15.75 billion over the twelve months ending in September 2025. Of this total, white wines accounted for approximately one third, or €5.4 billion, while red and rosé wines combined represented two thirds, amounting to €10.35 billion.

When considering volumes, EU exports worldwide—including intra-EU trade—declined to 32 million hectolitres during the same period. The breakdown by type reveals that white wines comprised a significantly larger share by volume than by value. White wines reached nearly 43% of the total export volume, equating to 13.7 million hectolitres, whereas reds and rosés made up 57%, or 18.3 million hectolitres.

This difference between volume and value shares is linked to differences in average pricing. White wines were exported at an average price of €3.94 per litre, in contrast to reds and rosés, which fetched a higher average price of €5.65 per litre.

| EU exports of still bottled wines <small>Del Rey AWM</small> | | | |
|--|--------------|--------------|---------------|
| 12-month period to September 2025 | | | |
| Source: Data S&P Global; elaborated by Del Rey AWM | | | |
| | Bl € | M hl | €/l |
| Total still bottled | 15,8 | 32,0 | 4,92 € |
| Reds & rosés | 10,3 | 18,3 | 5,65 € |
| White | 5,4 | 13,7 | 3,94 € |
| | Bl € | M hl | €/l |
| Total still bottled | -1,7% | -3,2% | 1,6% |
| Reds & rosés | -2,5% | -3,5% | 1,1% |
| White | -0,0% | -2,7% | 2,7% |

Recent Evolution

The data for the twelve months leading up to September 2025 continue to confirm the relative strength of white wine exports compared to their red and rosé counterparts. White wines demonstrated resilience, maintaining their export value over the period. This stability is the result of a decrease in export volumes of white wines, which fell by 2.7%, being balanced by a corresponding increase in average export prices of

EU exports of still bottled wines by colour
Y-on-Y change Sep 2025 VALUE Source: Data S&P Global; elaborated by Del Rey AWM



2.7%. As a result, the total value of white wine exports remained steady, despite the fall in quantity.

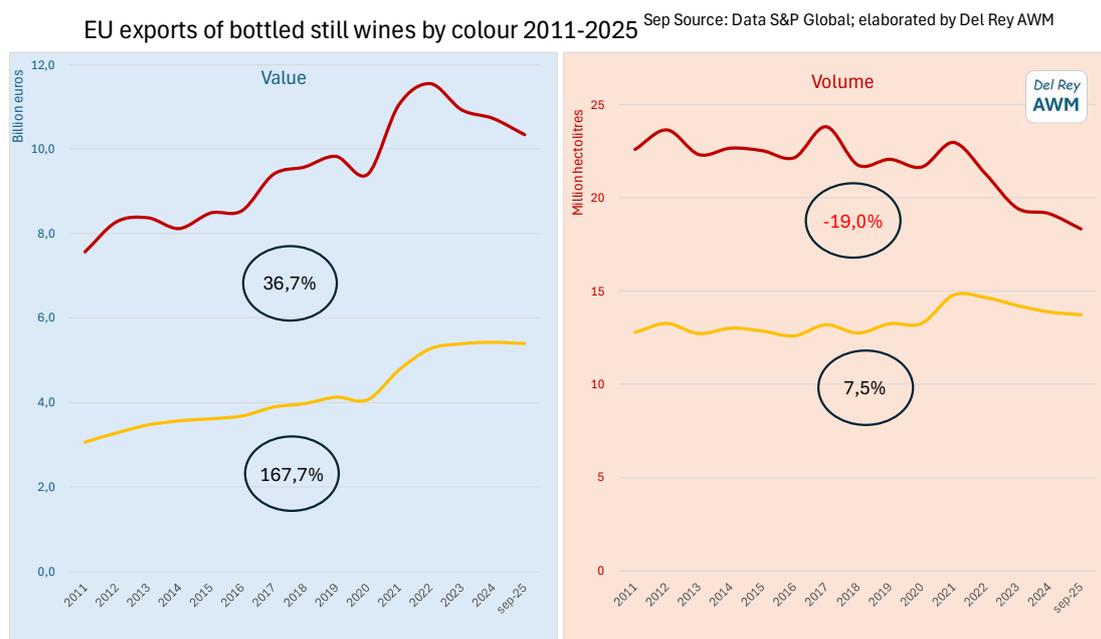
In contrast, reds and rosés experienced less favourable conditions across almost all categories. Although there was a marginal increase in their average export prices, up by 1.1%, this modest gain was insufficient to offset a more pronounced decline in export volume, which dropped by 3.5%. Consequently, reds and rosés also saw a downward trend in their euro value, recording a decrease of 2.5%. This illustrates that the price adjustments for reds and rosés were not enough to compensate for the broader contraction in export performance during the period.

Relative Change in Export Volumes: White vs Red & Rosé Wines (2011–2025)

In 2025, the relative change in export volumes for white and red wines continued to reflect a well-established long-term trend, with white wines maintaining a much stronger performance compared to their red and rosé counterparts. Analysing export figures over the past fifteen years, from 2011 to the year-on-year results leading up to September 2025, reveals a marked divergence in outcomes for these categories.

Exports of red and rosé wines from EU countries declined significantly, falling by 19% during the period in litres. This reduction saw volumes drop from 22.6 million hectolitres in 2011 to 18.3 million hectolitres by 2025—a total loss of 4.3 million hectolitres.

Conversely, EU exports of white wines registered a positive trend, increasing by 7.5% over the same period. Export volumes for white wines grew to 13.7 million hectolitres, adding approximately one million hectolitres. However, this increase in white



wine exports was not sufficient to offset the substantial decline in red and rosé wine volumes.

Over the past fifteen years, the **value** of both red and white wine exports from the EU has shown substantial growth. However, white wines have significantly outperformed reds and rosés in terms of value increase. Specifically, exports of red and rosé wines grew by 36.7%, rising from €7.6 billion to €10.3 billion. In contrast, the value of bottled white wine exports surged by 167.7% during the same period, climbing from €3.1 billion to €5.4 billion. This means that the growth rate for white wines was 4.5 times greater than that of reds and rosés.

A critical turning point for both red and white wine exports occurred in 2020. The extraordinary rebound in exports following the **COVID-19 pandemic** appeared to have a disproportionate effect: while the recovery seemed excessive for reds, it was less detrimental for whites. Since the end of 2022, EU exports of red and rosé wines have declined by 10% in value (euros), whereas white wine exports have continued to rise, increasing by 2.4% in the same timeframe.

Although both red and white wines have experienced declines in export volumes recently, the contraction has been more pronounced for reds and rosés, which saw a 14% decrease. White wines, meanwhile, recorded a smaller drop of 6.3%. These figures illustrate that the recent downward trend in export volumes has affected reds and rosés more severely than whites.

In summary, EU exports of white wines have consistently performed better than those of reds and rosés, both in the most recent months and over the longer term. This superior performance is evident in both value and volume, although it is more pronounced in terms of value growth. Despite the higher average prices achieved by reds and rosés, white wines have demonstrated stronger growth overall.

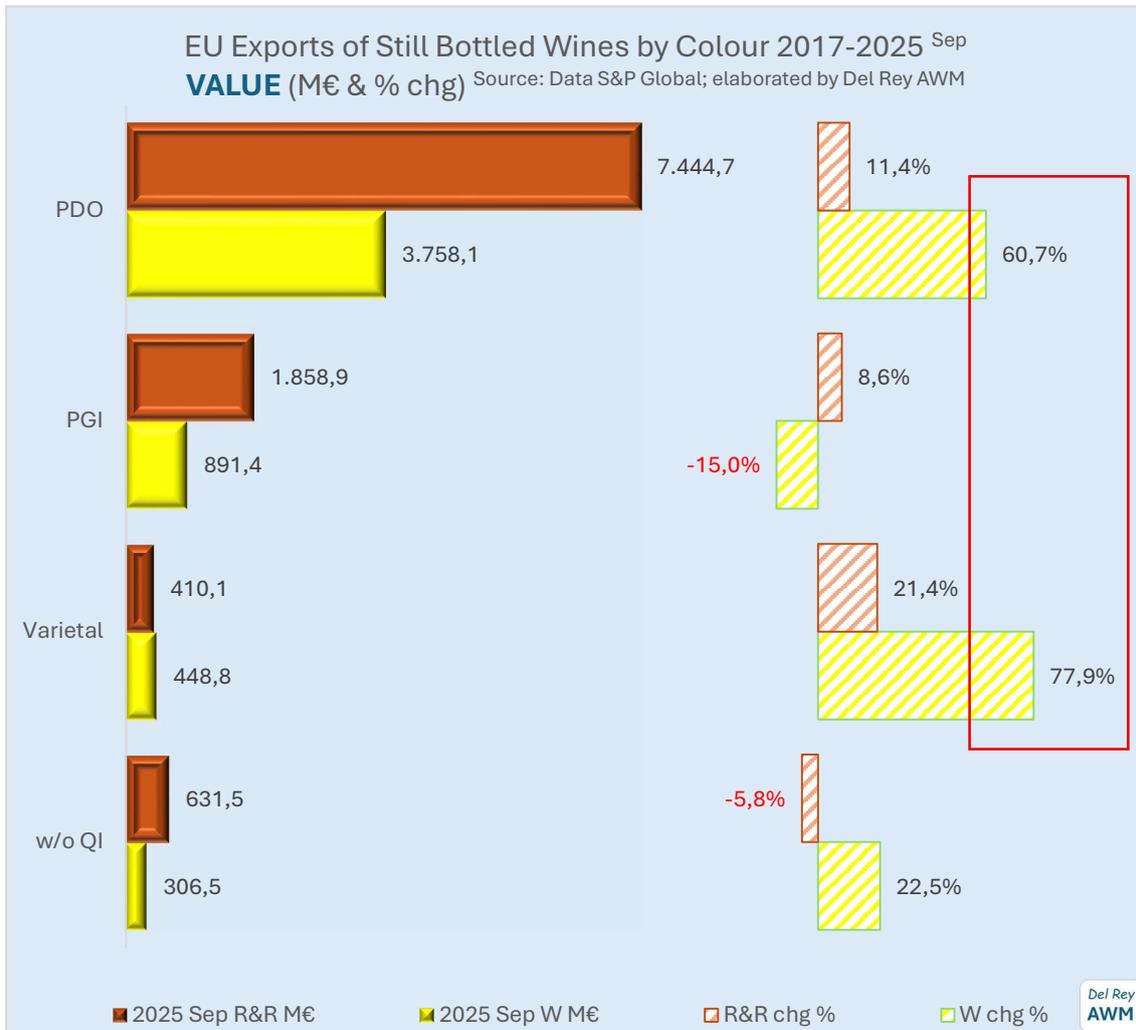
Performance by Wine Category: Varietals Versus PDO Wines

When analysing EU exports by wine category, it becomes clear that white wines labelled with the grape variety and year—commonly referred to as “varietals”—have shown a stronger evolution in value compared to wines with protected denomination of origin (PDO) and have outperformed other categories by an even greater margin. White bottled wines from the EU have also demonstrated better export growth than their red counterparts along all categories but PGI wines.

This trend has been particularly evident since 2017, when the introduction of a new official classification enabled varietal wines to be distinctly categorised. These wines, which do not carry any indication of geographical origin (neither PDO nor protected geographical indication, PGI) but instead highlight the grape variety and the year of harvest, have experienced robust growth. Over the nearly eight-year period up to the year-on-year results in September 2025, exports of these varietal wines

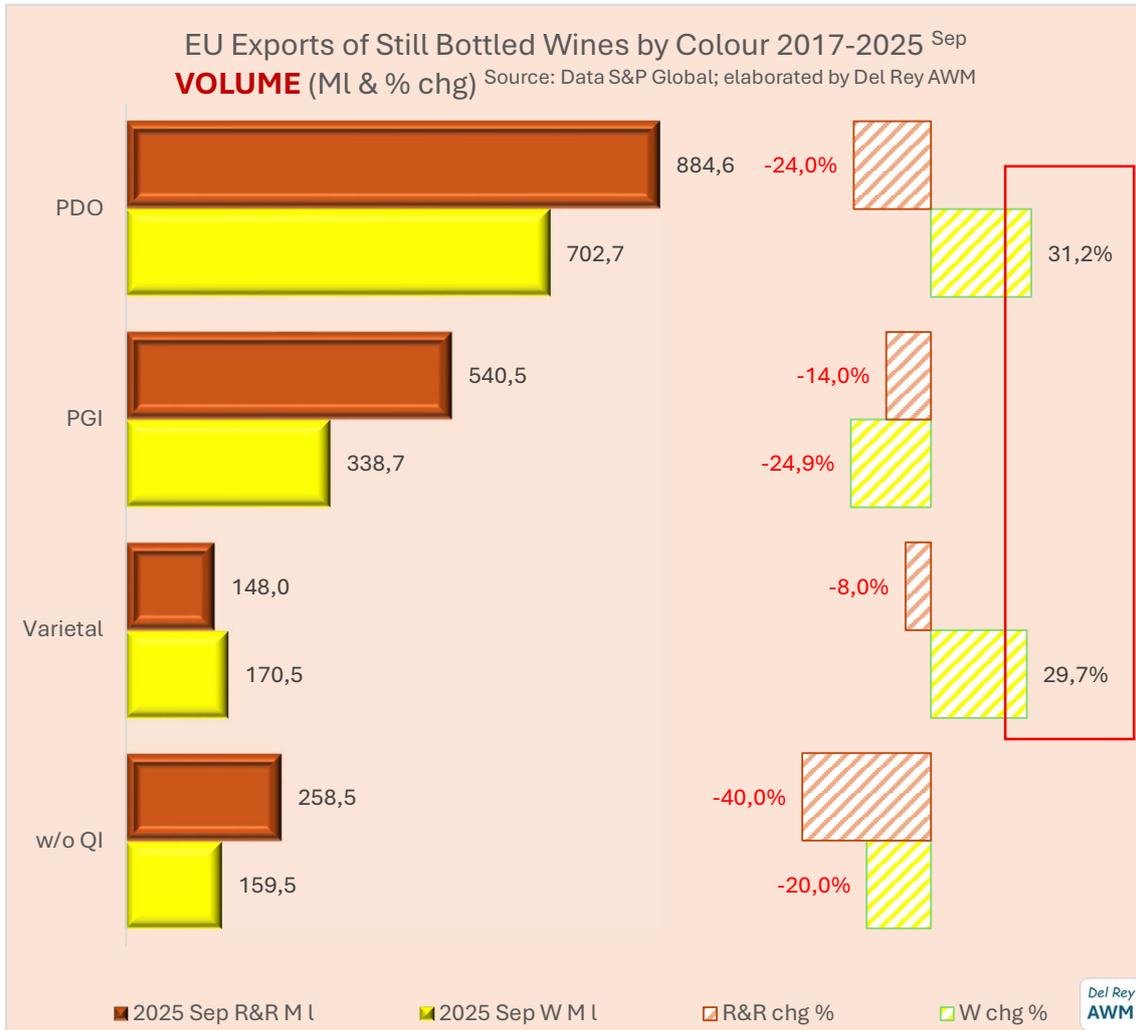
increased by almost 78% in value, reaching €448.8 million, and by 29.7% in volume, rising to 170.5 million litres.

In comparison, over the same timeframe, wines with PDO status also recorded significant growth, with export values climbing by 60.7% to €3.7 billion and export volumes increasing by 31.2% to 702.7 million litres. In volume terms, PDO wines performed slightly better than varietal wines, while in terms of value growth, varietal wines advanced a little more rapidly than their PDO counterparts.



Bottled wines bearing a Protected Geographical Indication (PGI) continue to represent a significantly larger proportion of EU exports compared to varietal wines. However, the rate at which PGI wines have grown is notably slower than that of varietals. Unlike other wine categories, PGI wine exports have fared better for red and rosé wines than for whites. Over the nearly eight years since 2017, white PGI wines have experienced a decrease of 15% in value and a sharper decline of 24.9% in volume. Conversely, red and rosé PGI wines have managed to achieve an 8.6% increase in value, despite a fall in volume by 14%.

Among wines without any indication of quality, white wines have demonstrated stronger performance compared to reds. Over the eight-year period, whites posted a 22.5% rise in export value, whereas reds experienced a decline. Moreover, the reduction in volume for white wines was less pronounced than that seen for reds.



Conclusion: Superior Performance of EU White Wine Exports

The analysis of EU exports of still bottled wines, differentiated by colour, reveals a clear and sustained advantage for white wines over their red and rosé counterparts. While the distinction is less pronounced when considering export volumes for 2025, white wines nonetheless maintain a stronger trajectory in terms of long-term growth. This positive trend is especially apparent for varietal white wines, which have outpaced those with Protected Denomination of Origin (PDO) and other wine categories in value growth.

Notably, the period following the COVID-19 pandemic served as a pivotal moment for the wine export market. The evolution after the substantial recovery observed right after COVID reinforced a broader pattern, indicating a growing consumer



preference for fresher and lower-alcohol wines. This shift in demand has further supported the ongoing robust performance of white wine exports from the EU.

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