

ANTEPRIME DI
TOSCANA



2026



WINE NUMBERS IN TUSCANY 2026



Istituto di Servizi per il Mercato Agricolo Alimentare

Regione Toscana





TREND SUMMARY



1. Production situation in Italy

While awaiting the definitive production data for 2025, the ISMEA-Assoenologi-UIV estimates remain valid. They outlined that there was a national production increase compared to 2024, estimated at around 47 million hectoliters (+8%). This figure keeps Italy firmly at the top of producer rankings. On a global level, the first estimates published in November by the OIV determine volumes at 232 million hectoliters, a 3% increase compared to the otherwise low production of 2024.



2. Price trends

2025 closed with a modest reduction in price lists. According to the ISMEA price index, the overall 2% decline occurred primarily in table wines, down 2.6%, and, to a lesser extent, in PGI and PDO wines. At the top of the quality pyramid, opposite trends were observed among white and red wines: the slight increase in price lists for the former was offset by a reduction in prices for the latter, confirming the difficult situation facing this segment, which is widespread in all producing countries.



3. Foreign trade

After 2024, which showed signs of partial recovery, especially in terms of exported Italian wines, 2025, based on provisional information, appears to once again illustrate moderate uncertainty in an international context of tensions and conflicts.

According to still partial data from the first ten months of 2025, among the main wine-exporting countries, Italy recorded a decline in overall exports in both volume (-1.5%) and value (-2.7%), a trend similar to that observed in France, which saw a 2.2% reduction in export quantities and a 2.7% reduction in economic value. Spain also showed a reduction in exports with a more limited but widespread contraction in both dimensions, equal to -1.7% in volume and -1.5% in value. If these trends were to be confirmed by data from the last two months of the year, Italy would still maintain a position of prominence on the global scene, firmly in first place in export volumes and consolidating a value level that, although slightly down from the record set in 2024, would remain just below the €8 billion threshold.



4. Sales to distribution

According to data from the Ismea-NielsenIQ Food Consumption Observatory, grocery shopping in 2025 cost Italians 3.7% more than in 2024. Meanwhile, the wine and sparkling wine segment—which represents 3% of total spending—showed substantially stable spending, despite a 2.9% reduction in volumes. In 2025, volumes of still wines decreased by 3.9% (after last year's -2.1%). The decline affected both ordinary wines without denominations (-5.7%) and, to a lesser extent, DOC/DOCG wines (-3.1%), while IGT



wines, which had shown signs of recovery last year, also returned to negative value (-2.9% in volumes).

Sparkling wines, the positive performance of which has supported the sector's dynamics in recent years, are expected to accelerate growth (+3.2%) in 2025, confirming their position as a consolidated segment that maintains appeal for consumers, encouraged by the opportunity to consume them outside of mealtimes (from aperitifs to celebrations), and as a key ingredient in cocktails.



5. Prospects

The global wine sector is undergoing profound transformations, driven by both internal and external factors. Internal variables include shifts in consumer tastes and preferences, a growing focus on sustainability, and the reshaping of product offerings by wineries. At the same time, the sector is being influenced by external factors such as geopolitical instability, tensions in international markets, and global trade often hampered by the introduction of duties and tariff barriers, which negatively impact competitiveness and trade.

There is, therefore, a transformation that is more structural than cyclical and requires action to reintroduce consumers to wine, with communication geared especially toward younger generations who seem to have little connection to this product, at least in its traditional consumption patterns. Wine remains an identity-defined product that embodies tradition and terroir, but it requires a more contemporary approach to broaden its consumer base.

In this context of renewal, wine tourism and all experiences that bring visitors closer to the world of wine and its places of production are becoming increasingly important, both for domestic and international tourists, given that demand for premium and quality red wines is expected to continue to grow in terms of value, fueled by new distribution models and more experienced or experience-focused consumers.

Regarding international markets, given Italy's leading role, new agreements with emerging markets such as Mercosur and India represent an opportunity, without forgetting the USA, which, despite all the current challenges, remains an essential destination for Italian wine.



EXECUTIVE SUMMARY

Tuscan viticulture represents 12% of the regional agricultural production¹, compared to a national average of 9%.

The sector includes over 12,000 wineries operating on approximately 61,000 hectares, predominantly planted with red grape varieties, while there are approximately 5,200 winemakers.

Almost all the region's vineyards are dedicated to quality production: 97% of vineyards are registered with DOP designations, compared to a national average of 65%. This commitment is also reflected in the wine sold on the market, where approximately 90% of Tuscan production falls under Geographical Indication (GI), compared to just over half of the national total.

Another key aspect of Tuscan viticulture is its focus on sustainability. In 2024, the organic vineyard area exceeded 23,000 hectares, accounting for 38% of the region's vineyards and 17% of Italy's total organic vineyard area. This result places Tuscany among the most advanced regions along the path outlined by the European Green Deal and the goals of the UN 2030 Agenda.

The Tuscan winemaking landscape is unique for its ability to bring together diverse entities: large companies and small producers, conventional and organic viticulture, and diverse terroirs and microclimates. A common thread is a strong ampelographic identity, dominated by Sangiovese, which alone covers almost 60% of the vineyard area. International varieties such as Merlot and Cabernet Sauvignon follow at a distance. White grape varieties play a more marginal role, with Trebbiano Toscano and Vermentino together representing less than 7% of the total.

The appellation system also reflects this concentration. Despite counting 52 DOPs, including 11 DOCGs, the majority of the area is held by a few historic denominations: Chianti and Chianti Classico alone cover over 60% of the cultivated area. Among the IGPs, the centrality is even more evident, with IGT Toscana representing approximately 95% of the total, confirming its position as the main regional producer in this segment.

In the GI segment, Tuscany plays a significant role at the national level, with bottled production amounting to 1.9 million hectoliters and a corresponding value of €1.14 billion. The region represents 7% of the volume and 10% of the national value, respectively. Overall, the total bottled GI production in Italy was 25.6 million hectoliters, with an ex-factory value of €11.04 billion. In 2025, initial ISMEA analyses of data provided by certification bodies indicate substantial stability in bottled volumes of Tuscan DOP wines, compared to a slight decline in regional IGT wines.

Meanwhile, the declaration data relating to the 2025 harvest confirm the overall estimate forecast at the beginning of autumn, as a result of the proposals submitted to the Region by the Consortia. These were aimed at maintaining market balance and involved a policy of limiting supply in order to manage both the established downward trend in domestic demand—while foreign demand holds steady in volume but declines in value—and the substantial stock levels.

Total regional wine production, equal to 2.2 million hectoliters, indicates a 19% reduction compared to 2024, an exceptional year for wine production, but exactly in line with the average wine production of the last 15 years, which since 2010 has stood at around 2.2 million hectoliters.

Exports of Tuscan PDO still wines, 96% of which are red, increased slightly in volume (+0.7%) in the first ten months of 2025 but decreased in value (-8.0%) compared to the same period in 2024. The trend differs depending on the destination: volumes grew to the European Union (+3.5%), while decreased slightly to non-EU countries (-0.6%). In value, however, the decline affects both areas, being more pronounced in non-EU markets (-8.6%). This is particularly significant considering that non-EU countries continue to represent a key share of Tuscan PDOs, accounting for approximately two-thirds of volumes and over 70% of value.

Domestic demand for Tuscan DOC/DOCG wines, limited to purchases through large-scale retail outlets, is also slowing. In 2025, sales of regional DOPs decreased by 2.1% in volume, accompanied by a 1.4% decline in value.

While more traditional forms of distribution show a negative trend, a rapidly expanding aspect is wine tourism, which contributes significantly to the development of "widespread" Tuscany, that of inland and rural areas, strengthening the link between agriculture, tourism, and local communities.

Tuscany is one of the most internationally recognized and appreciated tourist destinations owing to its unique heritage that integrates landscape, culture, art, manufacturing traditions, and excellent food and wine.

In 2024, it confirmed its importance in the national tourism landscape, reaching 15 million arrivals and 46.2 million overnight stays, which represent approximately 10% of all tourist influx into the country.

¹ Production at basic prices calculated at current prices (source: Istat)