



Newsletter Spain – October 2026

The grape harvest concluded as early as the end of September—earlier than ever before. Normally, it extends into mid-October.

The figures have been officially confirmed: the total harvest volume stands at around 34 million hectoliters, with La Mancha accounting for approximately 19 million (a volume consistent with previous harvests). This figure falls short of earlier estimates — a consequence of high summer temperatures and a lack of rainfall, which had a critical impact, particularly during the final stage of the growing season.

Overall, Spain's harvest is relatively modest, though slightly higher than the previous year's. A key characteristic is ripe grapes, resulting in higher alcohol content. Nevertheless, some producers are offering specific batches of white wine with less than 10% alcohol (intended as a cocktail base), produced specifically for this market segment.

The most significant harvest shortfalls were confirmed among international red grape varieties such as Merlot. At the start of the marketing year, trade in varietal wines was sluggish and subdued, preventing any price increases in these categories.

Regarding white wine produced via controlled fermentation (FC), we anticipate that prices have stabilized at approximately €3.50 per hectometre. This price level aligns with that achieved in contracts concluded between wineries and customers since June. At the start of the campaign, prices were higher due to the grape prices published by Felix Solis; cooperatives had to adjust to meet their winegrowers' expectations. Prices have now stabilized, making Spain competitive on international markets. Future price trends will depend on market dynamics; Prices could either fall or rise. Currently, however, there is no upward movement; instead, prices remain stable. We anticipate that producers—seeking to kickstart their sales campaigns and open up market opportunities—will be quite open to customer offers regarding pricing and terms.

Red wine prices show relative stability, having tracked the levels seen in the summer. Production volumes were lower due to harvest conditions and decisions made on the supply side; with demand also remaining subdued, prices are holding steady—showing no clear upward or downward trend. Alcohol levels range from 11% to 14%; red wines with 10% alcohol are difficult to find, as only a few wineries produce them.

As for rectified concentrated grape must (MCR), prices dropped at the end of the Spanish and Italian harvests as immediate demand eased. Prices are expected to follow the trend seen in sulphited musts, which currently points to a low price level.

For the crop 2026 in Spain ...

[METEO Ciudad Real -- Servicio meteorológico y climatológico online de Ciudad Real - Valores](#)

Up to today – * 13/10/26

	Rain in Litres in Autumn September October November	Rain in litres in Winter December January February	Rain in Litres in Spring March April May	Rain in Litres in Summer June July August	Total Rain in Lts	Total production Mio/HLS Region La Mancha
Rainfalls						
2025/2026	94,40	118,20	137,20	27,4	377,20*	crop 2026 = 19,00
2024/2025	178,80	50,00	231,60	22,00	482,40	crop 2025 = 19,00
2023/2024	167,8	138,00	134,40	28,20	468,40	crop 2024 = 23,00
2022/2023	54,1	138,2	60,4	58,8	311,5	crop 2023 = 17,00
2021/2022	142,2	107,4	20,2	24	293,8	crop 2022 = 20,00
2020/2021	124,2	124,8	94,2	40,8	384	crop 2021 = 21,00
2019/2020	137,4	72,6	161,8	6,8	378,6	crop 2020 = 22,00
2018/2019	128,6	26,2	78,4	6,4	239,6	crop 2019 = 19,00
2017/2018	61,6	113,8	264,8	16,6	456,8	crop 2018 = 29,08
2016/2017	165	102,8	108,4	31	407,2	crop 2017 = 19,45
2015/2016	87,8	56,8	174,2	2,2	321	crop 2016 = 24,42
2014/2015	159,4	64,8	77,6	35,2	337	crop 2015 = 22,94
2013/2014	139,6	237,4	54,8	14,4	446,2	crop 2014 = 25,12
2012/2013	299,4	129,6	256,2	11,8	697	crop 2013 = 33,03
2011/2012	89	26,6	121,4	10,8	247,8	crop 2012 = 19,00
2010/2011	147,6	243,2	130,6	2,4	523,8	crop 2011 = 18,90
2009/2010	42,8	391,8	98,2	49,1	581,9	crop 2010 = 21,60
2008/2009	129,4	67,3	71,8	32	300,5	crop 2009 = 20,00
2007/2008	¿... ?	¿... ?	¿... ?	¿... ?	602	crop 2008 = 23,10

GUIDELINE PRICES CROP 2026 FOR SPANISH WINES

PRICES EXW WINERY SUBJECT OF SALES WINE WITH ORIGIN SPAIN – WITHOUT VARIETAL INDICATION ON THE DOCUMENTS

TABLE WINE	BASE WINE FOR SPARKLING 10% F/C TA MIN 6	11% F/T Traditionally fermented	12% F/T Traditionally fermented	11% F/C Controlled fermentation	12% F/C Controlled fermentation	TREND
WHITE WINE	FROM 37,00 €/HL (€ 3,70 hº)	FROM 36,30 €/HL (€ 3,30 hº)	FROM 39,60 €/HL (€ 3,30 hº)	FROM 38,50 €/HL (€ 3,50 hº)	FROM 42,00 €/HL (€ 3,50 hº)	=
ROSÉ WINE	-	FROM 38,50 €/HL (€ 3,50 hº)	FROM 42,00 €/HL (€ 3,50 hº)	FROM 40,70 €/HL (€ 3,70 hº)	FROM 44,40 €/HL (€ 3,70 hº)	=

TABLE WINE	Red Wine 11% IC 5 MIN	Red Wine 12% IC 7 MIN	Red Wine 13% IC 8/9 MIN	TREND
RED WINE	FROM 40,70 €/HL (€ 3,70 hº)	FROM 46,80 €/HL (€ 3,80 hº)	FROM 50,70 €/HL (€ 3,90 hº)	=

VARIETAL WINES 100% WITH VARIETAL DESCRIPTION AND CROP INDICATION ON THE DAe

White Wine Varietal 100% * crop 2026		€ Indicative 12%	TREND
WHITE WINE AIREN	3,70 €/hgd	€ 44,40/HL	=
WHITE WINE MACABEO	3,80 €/hgd	€ 45,60/HL	=
WHITE WINE VERDEJO	4,50 €/hgd	€ 54,00/HL	=
WHITE WINE MOSCATEL	4,20 €/hgd	€ 50,40/HL	=
WHITE WINE SAUV. BLANC	5,50 €/hgd	€ 66,00/HL	=
WHITE WINE CHARDONNAY	5,35 €/hgd	€ 64,20/HL	=
Rosé Wine Varietal 100% * Crop 2026		€ Indicative 12%	TREND
ROSE TEMPRANILLO	3,80 €/hgd	€ 45,60/HL	=
ROSE GARNACHA	3,80 €/hgd	€ 45,60/HL	=
ROSE BOBAL	3,80 €/hgd	€ 45,60/HL	=
Red Wine Varietal 100% * Crop 2026		€ Indicative 12%	TREND
RED WINE TEMPRANILLO	4,00 €/hgd	€ 48,00/HL	=
RED WINE SYRAH	4,30 €/hgd	€ 51,60/HL	=
RED WINE CABERNET SAUV.	4,50 €/hgd	€ 54,00/HL	=
RED WINE MERLOT	4,70 €/hgd	€ 56,40/HL	=
RED WINE PINOT NOIR	5,50 €/hgd	€ 66,00/HL	=

Concentrate / rectified grape must concentrate 65 Brix – on the base of must prices crop 2026

INDICATIVE PRICE SUBJECT TO CONFIRMATION * PER TANK TRUCK / FLEXITANK EXW Spain.

100% VITISVINIFERA	PRICE KG	PRICE HL	TREND
Rectified grape must concentrate 65 BRIX * MCR	EUROS 1,48	EUROS 198,780	=
White grape must concentrate 65 BRIX	EUROS 1,38	EUROS 182,80	=

For any inquiries or commercial matters, please do not hesitate to contact us.

October 2026