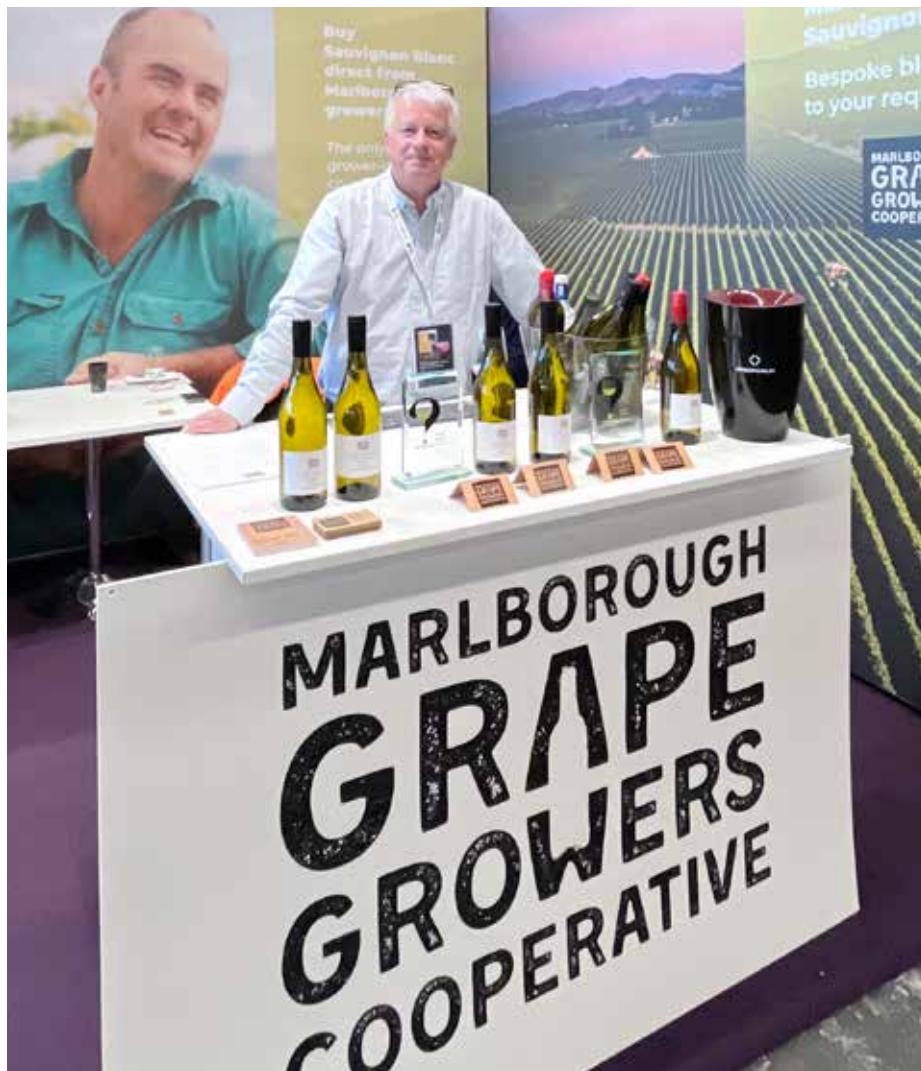


Bulk wine shows resilience within tightened market

Writer **Simone Madden-Grey** recently attended the 17th World Bulk Wine Expo in Amsterdam and spoke with Australian and New Zealand producers navigating oversupply, pricing pressure and shifting global demand — and discovering a market that's holding firmer than expected.



Mike Brown of Marlborough Grape Growers Cooperative at 17th World Bulk Wine Exhibition in Amsterdam

Bulk wine is demonstrating a resilience not seen in other sectors of the industry. At just over a third of global production, the category saw a modest 0.3% reduction in value for the first half of 2025, compared with -3.1% for bottled still wines. Despite this, producers are having to work hard to balance oversupply with economic sense.

More than 2,000 people from 25 countries converged on Amsterdam in November 2025 for the 17th World Bulk Wine Exhibition (WBWE). It was an opportunity to network,

build new relationships, strengthen existing contacts, and get a sense of the current market. For Mike Brown, from Marlborough Grape Growers Cooperative, this is the premier event for bulk wine. The Cooperative has been in attendance on and off for the past decade and this year was about “being out there amongst other Sauvignon Blanc producers and making sure we are connecting with our customers and potentially new customers”. Craig Vanstone, from Yealands Wine Group, described WBWE as an opportunity to

AT A GLANCE

- Global bulk wine value down just 0.3% in early 2025
- NZ and Australian producers are focused on clearing 2024 stock
- Pricing widely viewed as unsustainable across regions
- Growing buyer interest from China post-tariff removal
- Rising demand for lower-alcohol wines, driven by UK duty shifts
- Quality positioning seen as key differentiator in a tight market

“meet new clients and forge stronger relationships with current clients”.

“We’re also working with a lot of the brokers from Australia, New Zealand and the UK. They bring clients who are looking for wine and they give us a good feel for the market,” he explained.

Finding a balance

Pricing pressures and economic sustainability were front and centre as producers manage the economic realities of global oversupply with the long term implications of underselling a quality product. For Richard O’Brien of Giesen Wines, it’s about balance.

“I think it’s a matter of the industry finding the right balance in supply and demand again so we can retain the value New Zealand Sauvignon Blanc has built over the last 50 years.”

Jim Moulardellis from Austwine sees “respecting people’s livelihoods and

circumstances" as fundamental to economic sustainability.

"Pricing remains unsustainable. We are receiving mixed signals from the marketplace and a range of factors are impacting the overall demand that we're experiencing," Moularadellis said.

Echoing this, Paul Dunn, from New Zealand Bulk Wine, described prices as "totally unsustainable from a profitability point of view".

As early price indicators point to further drops for the 2026 Riverland vintage, Riverland Wine attended the WBWE for the first time. The event was a positive experience with good levels of engagement and Riverland Wine general manager Alex Cannon-Leyson said they would be looking to increase the



Jim Moularadellis (right) at Austwine's 2025 WBWE stand

number of wineries represented at future WBWE events.

The majority of exporters were working to clear 2024 stock, sending a clear signal that production volumes need to drop. NZ Wineries' Alistair McInstosh

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described the WBWE as useful for gauging market sentiment.

"We need to harvest less next year, otherwise we're going to be giving it away again and we can't continue to do that. It's not sustainable."

On a positive note, appointments with buyers and brokers from China had increased. While not a new market for Australian producers, the removal of trade tariffs has facilitated a welcome return of these customers. However, volume and pricing were down on previous years.

Mixed reactions to lower alcohol

Lower alcohol wines were also up for discussion with mixed reactions amongst attendees. Changes in UK duty to tax wines according to abv% has driven interest in this category. At Marlborough Grape Growers Cooperative, Mike Brown said, "For our UK customers in particular, if they're targeting lower price levels, they have asked for alcohol reductions". For Alex Cannon-Leyson, there is potential for the Riverland in this category, "as a niche that we can focus on to help with oversupply. It is something we feel the inland regions could own".

It was generally agreed that while technology for dealcoholisation had improved significantly, more work was needed in order to offer a premium product. This is perhaps reflected by increased interest in naturally fermented lower alcohol wines. For Yealands Wine Group, who produce a naturally fermented wine at around 10% abv, interest has been good particularly from their UK customers.



Giesen Wines at the 2025 WBWE



Image courtesy World Bulk Wine Exhibition

A focus on quality was the mainstay of seminars, panel discussions and sales pitches. In an extremely competitive market New Zealand producers have seen prices drop, despite continuing to realise prices well above the global average. Quality as a differentiator may bring some relief. "Pricing is tough at the moment", said Alistair McIntosh, "New Zealand's advantage is that our wine is still in demand and continues to be sold ahead of other countries."

The seminar Sourcing Bulk Wine with Horst Mueller from VinLog, Steve Dorfman from Ciatti Company, and Mark Satchwell of Greencroft Bottling, provided a number of practical tips for exporters. Emphasis was given to correct preparation of wine for bulk transportation and a deep understanding of logistics costs. For buyers, priorities have shifted, placing origin of product secondary to transportation costs and delivery timeframes. To maximise savings, exporters should structure

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pricing to account for transportation costs, especially those associated with containers sitting on- and off-quay.

In Sustainability: The Great Packaging Conundrum, Peter Stanbury of

Sustainable Wine Roundtable (SWR) was joined by Madalena Moreira of Encirc, The Wine Society's Simon Mason and Systembolaget's Gad Pettersson. They discussed how collective action helps to increase the uptake of different packaging formats, how improved technology allows higher quality wine to be offered in bag-in-box, that Systembolaget sells around 65% of still wines in glass alternatives, and that Encirc is able to manufacture a 300g bottle at scale.

Maintaining its position as the premier event for bulk wine, Vinexposium has WBWE 2026 already in the books for November 30-December 1 and a bulk wine format is being added to Vinexpo Explorer from June 8-10 in Mendoza, Argentina.

Sources

Bulk Wine Markets - Evolution up to June 2025, Del Ray AWM. www.delreyawm.com/mundo