

**Voluntary Report** – Voluntary - Public Distribution

**Date:** May 15, 2026

**Report Number:** BR2026-0021

**Report Name:** Brazilian Grape and Wine Market Overview

**Country:** Brazil

**Post:** Brasilia

**Report Category:** Fresh Deciduous Fruit, Fresh Fruit, Wine

**Prepared By:** Carolina Castro

**Approved By:** Joseph Degreenia

**Report Highlights:**

Brazil is emerging as a significant player in the global grape and wine industry. The country's vineyards, concentrated in the southern states of Rio Grande do Sul, Santa Catarina, and Paraná, benefit from favorable climate conditions that produce high-quality grapes for both table consumption and winemaking. Brazil is the world's 14th largest grape, and 11th largest wine, producer.

## **Planted Area**

Brazil maintains its position as the world's 14<sup>th</sup> largest grape producer while steadily expanding market presence. The country also ranks as the 11<sup>th</sup> largest wine producer. The 2025 planted area for grape cultivation in Brazil totaled 85,000 hectares (data from IBGE - Brazilian Institute of Geography and Statistics), primarily distributed across the South, Southeast, and Northeast regions.

IBGE estimates indicate that cultivated areas will reach 86,711 hectares in 2026. Grape production spans a wide variety, from small family-owned vineyards rooted in tradition to large commercial wineries that invest heavily in modern techniques and technological advancements to optimize production and quality.

Rio Grande do Sul is Brazil's largest grape-producing state, with approximately 48,000 hectares of vineyards. Niagara is the main variety grown, a rustic grape that is also grown in the Southeast, particularly in São Miguel Arcanjo, São Paulo, and Paraná. Pernambuco, home to the São Francisco Valley in the country's Northeast, contributes approximately 12,000 hectares and stands out as Brazil's leading center for high-value fruit cultivation.

In the states of São Paulo and Paraná there are small areas cultivating premium grapes with just over 1,100 hectares. The expansion of planted area is small, rather producers are focused on increasing productivity within existing vineyards. This growth is driven by advancements in technology and genetic improvements, rather than rapid expansion of cultivated land.

## **Grape Production**

Looking ahead, sector expectations for table grape production in 2026 remain steady, with volumes likely to match 2025 levels, though output could vary by approximately 10 percent depending on weather conditions. In recent years, grape producers have adopted advanced agricultural practices, including precision irrigation, integrated pest and disease control methods, and pruning and management techniques that enhance productivity and grape quality.

Rio Grande do Sul is traditionally Brazil's leading grape producer and produced approximately 750,000 MT in 2025, according to data from industry, after experiencing a decline in 2024 (686,651 MT) due to heavy rainfall damaging crops and fungal disease outbreaks in vineyards.

Pernambuco ranked first in 2024 with 755,266 MT, highlighting the growing importance of the Northeast region, particularly the irrigated areas of the São Francisco Valley. The state maintained similar production levels at 755,322 MT in 2025, nearly double its 2023 output. Due to unavailable IBGE data until the closure of this report, the 2025 figures for Pernambuco and other states listed below are projections.

São Paulo produced 158,923 MT in 2024, ranking third and underscoring its role in both table grape cultivation and wine production. However, the state faced a slight decline with 138,311 MT in 2025.

Bahia produced 111,167 MT in 2024, showing steady growth that nearly doubled its 2020 output, though production dropped slightly to 102,000 MT in 2025 due to weather challenges. Paraná produced 40,037 MT in 2024 but rebounded sharply to 56,872 MT in 2025, likely due to renewed investment or recovery efforts. Santa Catarina produced 38,684 MT in 2024 and increased to 59,590 MT in 2025 after a temporary dip.

## Figure 1

### Leading Grape-Producing States

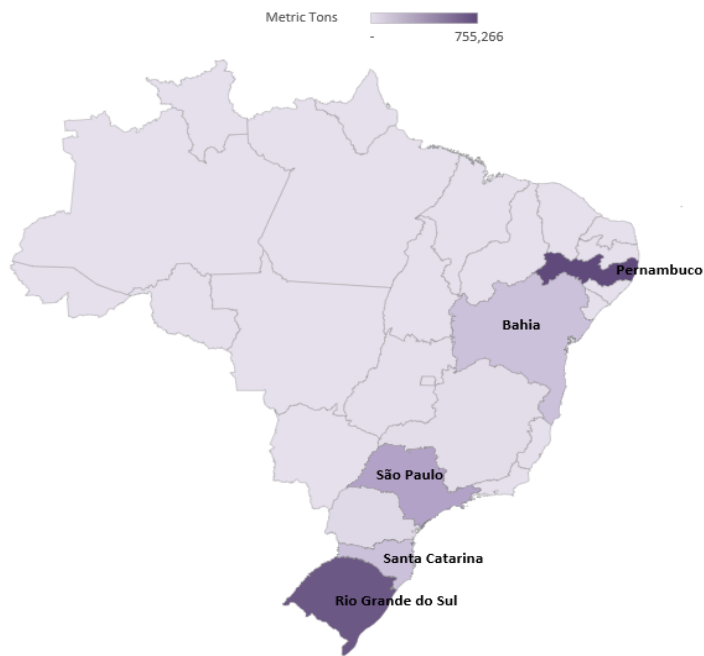
State	2020	2021	2022	2023	2024	2025*
Pernambuco	349,757	420,501	338,206	496,242	755,266	755,322
Rio Grande do Sul	735,342	951,254	734,982	904,794	686,651	957,120
São Paulo	149,803	168,729	164,131	152,532	158,923	138,311
Bahia	55,872	70,788	75,662	72,976	111,167	102,000
Paraná	54,200	46,019	51,492	43,287	40,037	56,872
Santa Catarina	60,378	59,721	56,590	57,617	36,684	59,590

\*IBGE estimate. Official figures for 2025 are not released by the closure of this report.

According to Post contacts, 2025 was a challenging year for grape producers, primarily due to unfavorable prices in both domestic and international markets, with no significant expansions in cultivation area.

## Figure 2

### Grape Production in Metric Tons



Source: IBGE (2024), map of Brazil elaborated by FAS Brasilia

According to the Brazilian Association of Producers and Exporters of Fruit and Derivatives (Abrafrutas) there are over 60,000 grape varieties worldwide, differing in color, flavor, size, and use. Grape production was established in southern Brazil, driven by European immigrants who introduced diverse grape varieties and advanced cultivation techniques, laying the foundation for the region's thriving viticulture.

Grapevines require a climate with defined seasons: cold winters and dry, warm summers. The soil must be well-drained, fertile, deep, and have a pH between 5.5 and 6.5. Production typically begins between the second and third year. Irrigation should be moderate and intensified during dry periods.

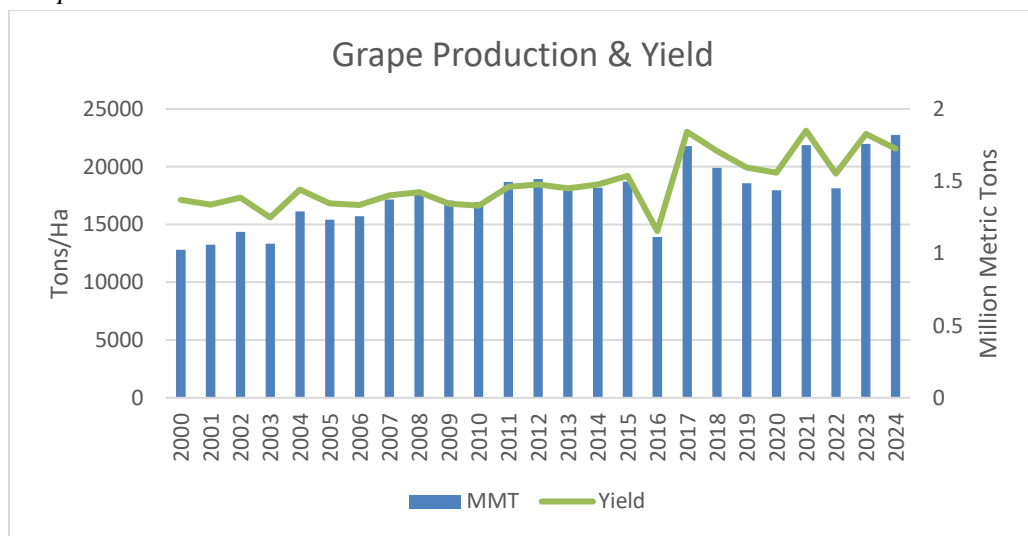
In Rio Grande do Sul, the temperate climate provides the necessary winter chill and seasonal variation that favor traditional grape cultivation, while the region's soils are well-suited for vineyards. Pernambuco, particularly the São Francisco Valley, benefits from a semi-arid climate with abundant sunshine and the ability to control water supply through irrigation. This allows producers to grow high-quality grapes even in tropical settings, as they can precisely manage and intensify irrigation during dry periods.

The Brazilian Agricultural Research Corporation (Embrapa) plays a vital role in modernizing and enhancing the competitiveness of Brazilian viticulture. They develop grape cultivars adapted to regional climate and soil, along with innovative techniques for management, irrigation, and harvesting that improve productivity and grape quality. Embrapa's research strengthened key production hubs such as the Vale dos Vinhedos in Rio Grande do Sul and the São Francisco Valley in the Northeast.

Additionally, Embrapa facilitates technology transfer through training programs, technical publications, and direct support to farmers, promoting best agricultural practices. Collaborating with universities, cooperatives, and private companies, Embrapa fosters innovation and expands market access, driving innovation and positioning Brazil as a global reference in grape and wine production.

**Figure 3**

*Grape Production & Yield*



Source: IBGE (2024), chart prepared by FAS Brasilia

The yield has shown consistent improvement, increasing from 1,024 tons per hectare (t/ha) in 2000 to a record 1,820 t/ha in 2024.

### **Brazil's São Francisco Valley**

The São Francisco Valley (VSF, acronym in Portuguese) in northeastern Brazil, spanning from Bahia and Pernambuco, is a major agricultural region where grape production relies heavily on irrigation from the São Francisco River. This essential irrigation enables year-round farming in the valley's semi-arid climate, allowing for multiple annual harvests and making the region uniquely productive. Advanced irrigation systems and modern farming techniques have transformed the area into a leading producer of high-quality table and wine grapes, supporting both domestic consumption and exports. The São Francisco River basin also extends into parts of Goiás and the Federal District, meaning that while the valley itself is not entirely within Goiás, its watershed has a presence in the state. Key varieties grown in the São Francisco Valley include table grapes such as Isabel and Crimson, as well as wine grapes like Bordeaux and Syrah.

### **Grape Varieties**

Brazil's leading table grape varieties include BRS Vitória, Italia, and Red Globe. BRS Vitória, developed by Embrapa, is the country's top seedless grape, known for its small black berries, high sugar content, and ability to produce multiple harvests per year, making it highly profitable and popular in both domestic and export markets. Italia is known for its large greenish-yellow berries with a mild muscat flavor and excellent shelf life, while Red Globe stands out for its very large, pink-to-deep red berries, high yields, and good post-harvest preservation. These three cultivars anchor Brazil's table grape industry and meet a wide range of market preferences.

The "Pingo de Mel" grape refers to premium, high-quality varieties, such as Gota de Mel or Vitória, which are noted for their sweet flavor. This variety is highly valued in Brazil, particularly in the Goiás region, where it is celebrated for its distinct sweetness and striking aroma. It is widely cultivated in local viticulture.

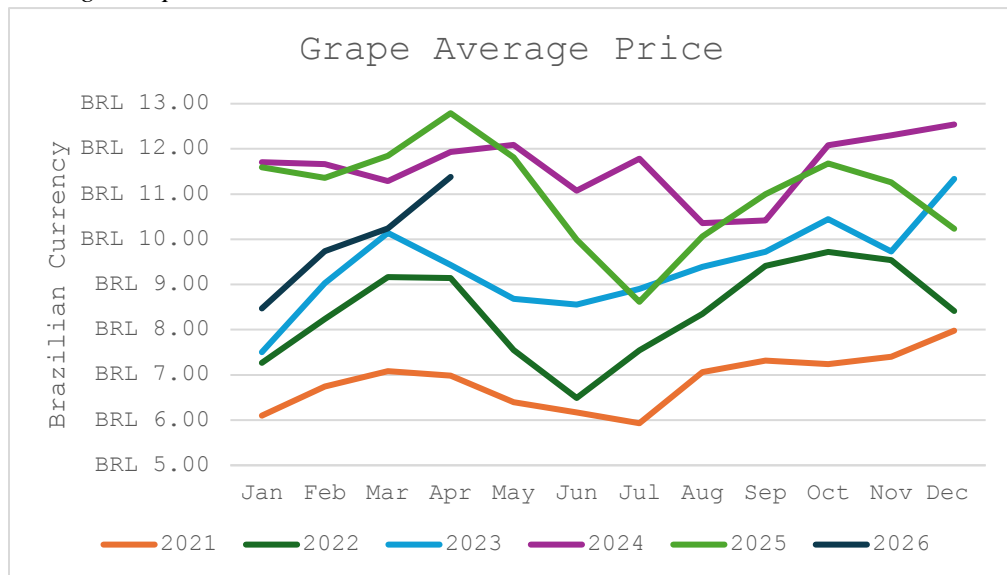
### **Price**

Over the past decade, grape prices in Brazil steadily increased. This upward trend is fueled by growing domestic and international demand, alongside rising production costs linked to the modernization of agricultural techniques. While prices tend to stabilize or decrease during harvest periods, the overall price trend increased, particularly for high-quality varieties. This price growth encouraged producers to invest in technology and production improvements, aiming for higher yields and more competitive pricing in both national and international markets. February and March typically result in the highest prices due to increased domestic demand and limited availability of certain varieties.

From 2021 to 2025, average grape prices in Brazil, measured in BRL per kilogram (2.20 pounds), showed a consistent upward trend with notable volatility. Prices began at monthly averages of approximately BRL 6.10-7.98 (USD 1.17-1.53) in 2021 and climbed steadily over the period. By 2025, prices had stabilized at elevated levels, ranging from BRL 9.69 (USD 1.86) to BRL 12.79 (USD 2.45), reflecting heightened market demand and supply constraints throughout the period. Early 2026 data shows signs of moderation, with January and February prices at BRL 8.47 (USD 1.62) and BRL 9.74 (USD 1.87), respectively.

**Figure 4**

*Average Grape Price*



Source: CEPEA/ESALQ, elaborated by FAS Brasilia

In 2026, producers in the São Francisco Valley struggled to meet demand due to fewer pruned areas and late rainfall, and while producers expect higher harvests, forecasts of heavier rains in the first half of 2026 may limit growth. To address these challenges, some growers are investing in protective coverings, increasing production costs. In 2025 average grape prices in Brazil rose as first shipments to Europe eased cold storage volumes, especially for seedless white varieties like Arra 15, Autumn, and Sugar Crisp. Reduced supply of BRS Vitória further pushed up prices, with packaged seedless black grapes averaging BRL 11.00/kg (USD 2.11/2.2 pounds) and seedless white grapes rising 10 percent to BRL 10.80/kg (USD 2.07) in August 2025.

### Consumption

Grapes are the third most consumed fruit in Brazil and consumption continues to increase. In 2024, Brazilian grape consumption totaled 7.05 lbs/capita and increased to 7.71 lbs/capita in 2025, with demand rising for high-quality, seedless varieties. Consumption peaks during the January-May harvest, when grapes are widely available. Demand for organic and premium grapes is also growing, driven by health-conscious consumers.

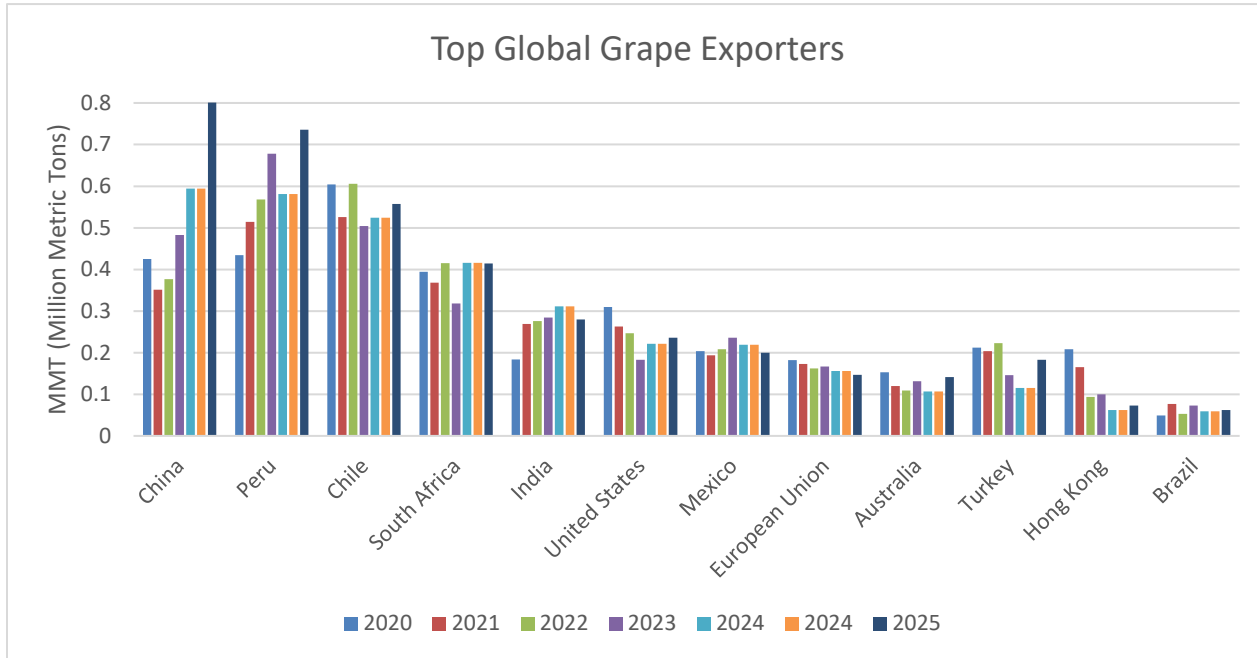
Local initiatives and Embrapa-developed varieties have ensured a steady supply and boosted popularity. The 2026 harvest is expected to improve the quality of Brazilian wines and increase demand for domestic labels, with states like São Paulo and Minas Gerais significantly expanding production to meet market needs.

### Grape Exports

In 2025, Brazil ranked 12<sup>th</sup> in global grape exports. In that same year, Brazil exported 62,168 MT of grapes, reflecting a 5.8 percent increase from 2024. Although Brazil's grape export volumes lag the top exporters, the country has sustained its position in the global market year after year.

**Figure 5**

*Global Grape Exports*



Source: TDM, chart elaborated by FAS Brasilia

The Brazilian grape market is strongly tied to the domestic market, leaning significantly toward industrial processing, primarily for juice and wine. Depending on the harvest and region, approximately 50 to 60 percent of grapes are directed to industry, while 40 to 50 percent are consumed fresh as table grapes.

Brazil exports grapes to neighboring countries and international markets, particularly in South America and Europe, although its share remains relatively small compared to major global producers. The growth in exports is driven by the pursuit of high-quality varieties, phytosanitary certifications, and innovative cultivation practices.

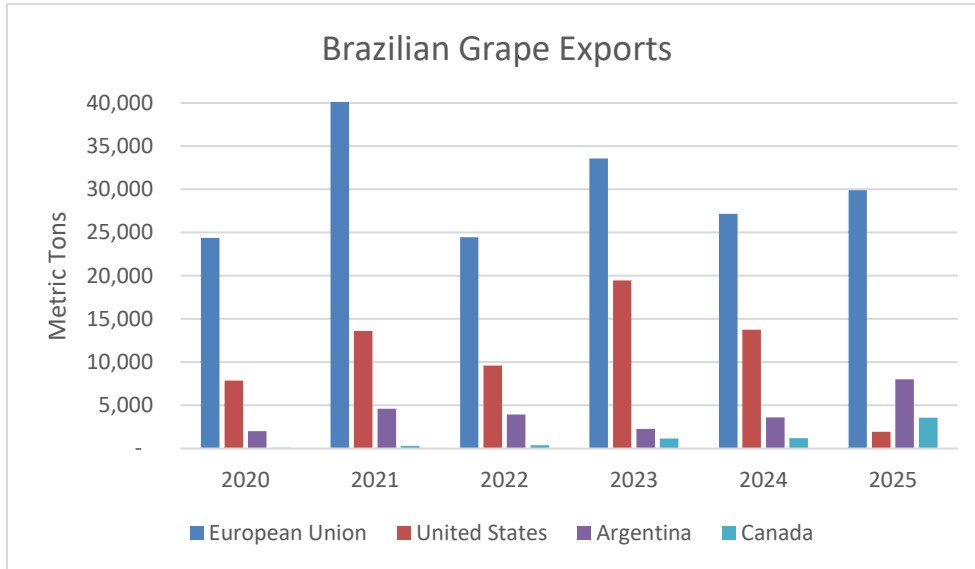
Trade data from the past five years highlights a steady increase in Brazilian grape exports, particularly to the European Union and United States.

Brazil exported 2,284 MT of grapes worldwide in the first quarter of 2026. From 2020 to 2025, Europe remained the leading destination for Brazilian grape exports, with volumes fluctuating from 24,368 MT in 2020 to a high of 40,144 MT in 2021, then varying between 24,469 MT and 33,589 MT before reaching 29,915 MT in 2025. The United States saw inconsistent demand, rising from 7,880 MT in 2020 to 13,602 MT in 2021, peaking at 19,477 MT in 2023, and dropping sharply to 1,952 MT in 2025.

Argentina experienced volatility but strong growth, increasing from 2,003 MT in 2020 to 8,004 MT in 2025. Canada showed consistent growth, rising from 87 MT in 2020 to 3,576 MT in 2025.

**Figure 6**

*Brazilian Grape Exports*



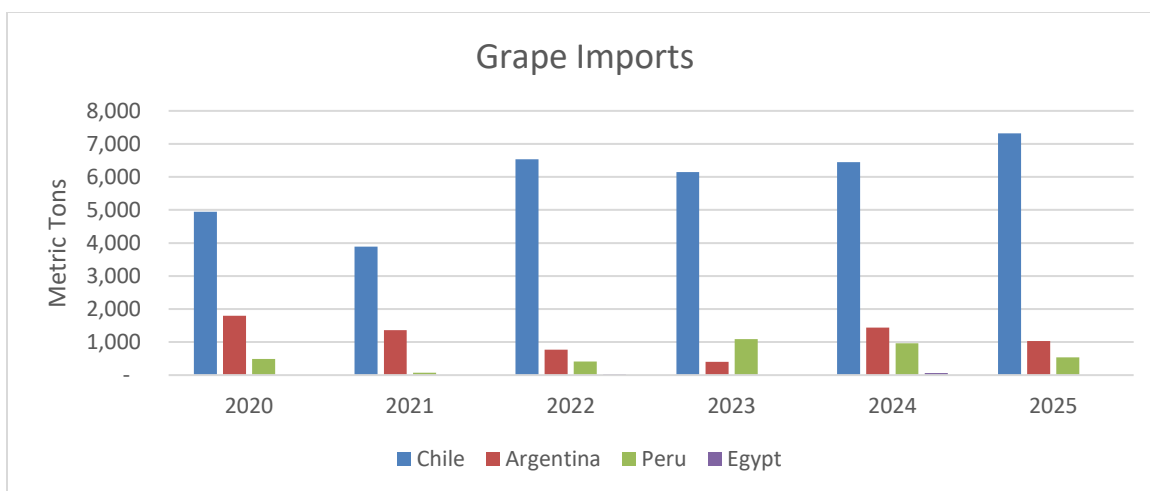
Source: TDM, chart elaborated by FAS Brasilia

**Grape Imports to Brazil**

Brazil's imports of grapes recently recovered and diversified, with Chile maintaining its position as the leading supplier. Argentina and Peru are steadily gaining market share, highlighting evolving supply chains and shifting consumer preferences.

**Figure 7**

*Grape Imports to Brazil*



Source: TDM, chart elaborated by FAS Brasilia

In the first quarter of 2026, Brazil imported 4,455 MT worldwide. From 2020 to 2025, Chile consistently dominated grape imports to Brazil, with volumes rising from approximately 5,000 MT in 2020 to over 7,000 MT by 2025. Argentina was the second-largest supplier early in the period, providing about 1,800 MT in 2020, but its exports declined sharply after 2021, partially recovering in 2024 and 2025.

## **Wine Production**

Brazil has emerged as a prominent player in viticulture. The Vale dos Vinhedos in Serra Gaúcha, located in southern Brazil, has earned recognition worldwide.

Since the 1980s, the sector expanded further, fueled by the diversification of grape varieties and increased interest from both consumers and producers. Currently, Brazil is a large wine producer in South America, with diverse wine regions contributing unique styles and flavors. The development of wine tourism and improvements in product quality have also boosted international recognition of Brazilian viticulture.

Among the most common grapes used in wine production are Isabel, widely utilized for juices and everyday wines, and vinifera varieties such as Merlot, Cabernet Sauvignon, Tannat, and Chardonnay, which are used to produce both red and white wines.

In the fine wine sector, key red varieties include Syrah, Cabernet Sauvignon, Tempranillo, and Touriga Nacional, while standout white varieties include Chenin Blanc, Sauvignon Blanc, and Muscat. Chenin Blanc is characterized by moderate vigor, a cycle of 110-120 days, medium to large clusters, and a productivity of approximately 11 MT per hectare. Sauvignon Blanc, which is more productive, forms smaller, compact clusters with a similar cycle to Chenin Blanc. Syrah, also moderately vigorous, has a cycle of 106-120 days and medium-sized clusters weighing approximately 130g. Tempranillo, widely cultivated in southern Brazil, produces medium to large clusters weighing approximately 240g, with a cycle of 106-109 days and an average productivity of 10 t/ha hectare.

Brazil gained prominence in sparkling wine production, particularly in the Serra Gaúcha region. Both traditional methods and the Charmat process - a faster method where the second fermentation occurs in pressurized stainless-steel tanks rather than bottles - are used to create sparkling wines ranging from dry to sweet.

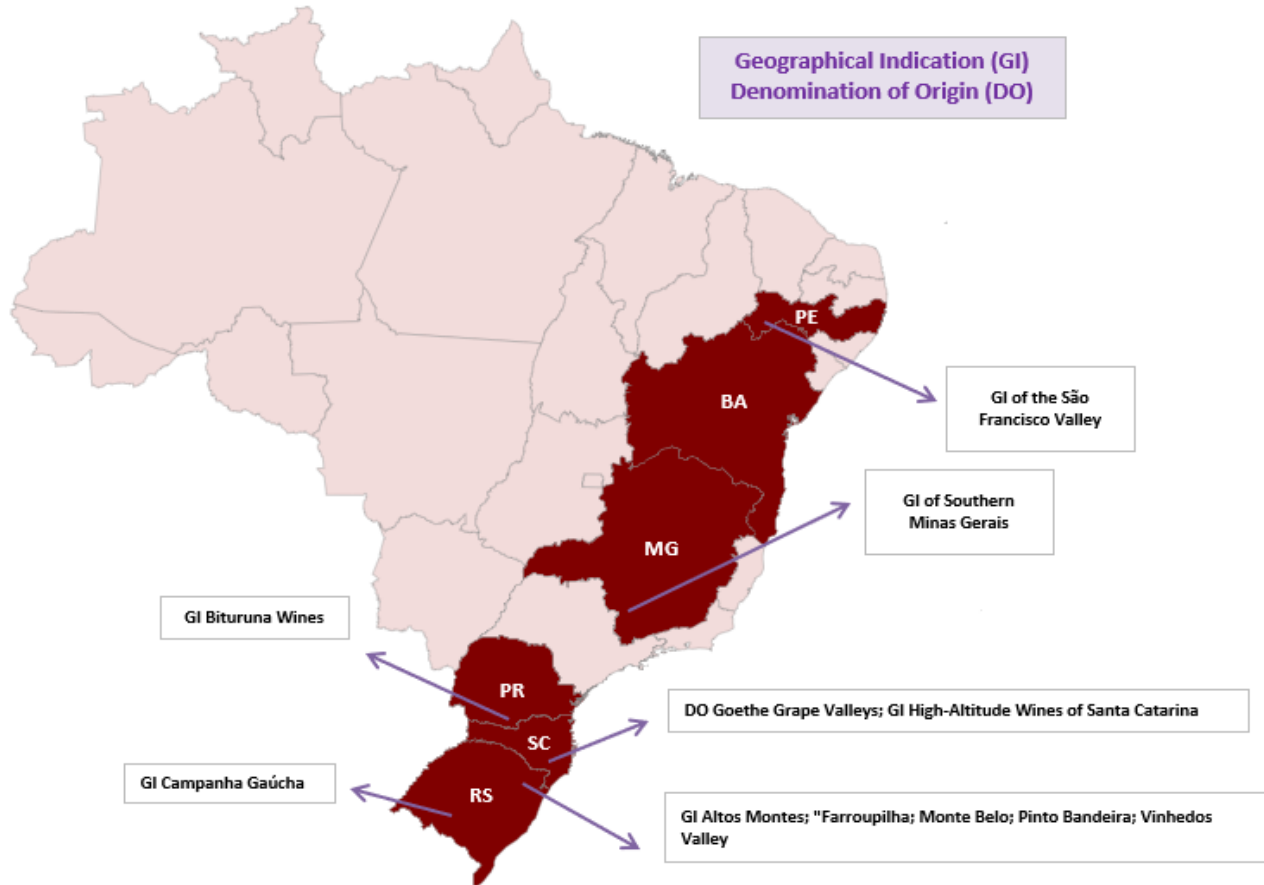
The São Francisco Valley region received a Geographical Indication (GI) for its wines in 2022 and is renowned for producing high-quality wines, particularly noted for their balanced acidity. The region is home to wineries such as Terranova, part of the Miolo Group, and Rio Sol, which contributed to its growing reputation in the wine industry.

The recognition of Geographical Indications (GIs) for Brazilian wines enhances the value of traditional products tied to specific regions, protecting production areas. GIs identify wines from defined geographic areas where quality, reputation, or unique characteristics are inherently linked to their origin.

Brazil recognizes two types of GIs: Indication of Origin (IP), for regions known for wine production, and Denomination of Origin (DO), for wines whose qualities are directly influenced by geographic factors. GIs benefit producers through collective organization, boost local economies, enhance regional product reputation, and promote wine tourism with each GI managed by producer associations responsible for oversight, protection, and promotion.

**Figure 8**

*Wine GIs*



Source: Embrapa Grape and Wine 2025

## **Wine Trade**

Brazil is ranked as the 16<sup>th</sup> largest wine exporter globally 16 million liters. The country occupies a niche position in the international market with modest export volumes compared to leading producers like Chile (approximately 700 million liters in 2025) and Australia (approximately 633 million liters in 2025).

In the first half of 2025, exports grew by 30 percent in volume and 22 percent in revenue, driven by initiatives from Apex Brasil (Brazilian Trade and Investment Promotion Agency).

Brazilian wine exports declined between 2021 and 2026. Exports peaked at 8 million liters in 2021 before falling to 5.6 million liters in 2024 - a 30 percent decrease. Brazil's total wine exports in 2025 reached 16.61 million liters demonstrating recovery and reflecting sustained global interest in Brazilian wine.

Paraguay remains Brazil's largest wine export market. After declining from 5.4 million liters in 2022 to 3.7 million liters in 2023 and 2024, Brazilian exports to Paraguay rebounded to a record 8.8 million in 2025.

Paraguay continues to be a vital market for Brazilian wine.

**Figure 9**

*Brazilian Wine Exports*



Source: TDM, chart elaborated by FAS Brasilia

Brazil exported 3 million liters of wine worldwide in the first quarter of 2026. The European Union saw a notable rise in imports, reaching 340,073 liters in 2025 after relatively low volumes in earlier years. Exports to Haiti also grew, from approximately 398,000 liters in 2020 to 1.814 million liters in 2025.

The United States experienced a decline after 2022, decreasing from 916,958 liters in 2020 to 420,475 liters in 2024, with a slight recovery to 552,248 liters in 2025. Venezuela, though a smaller market, showed steady growth from 4,806 liters in 2020 to 328,159 liters in 2025.

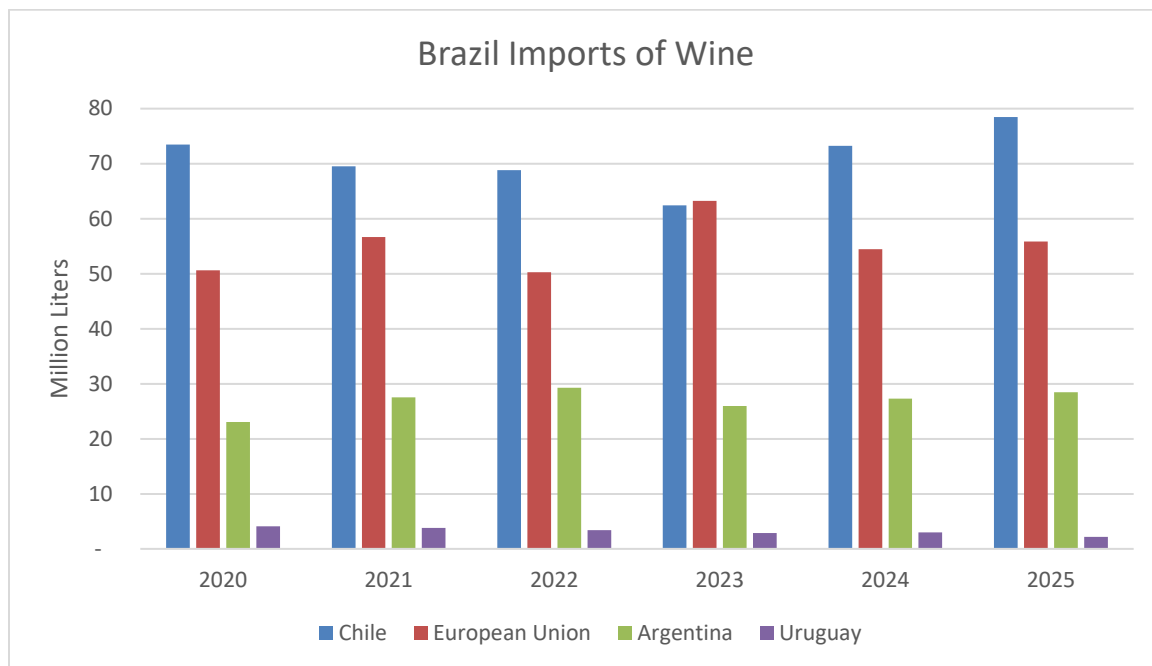
Imports

From 2020 to 2025, Chile remained Brazil’s top wine supplier, with imports rising approximately to seven percent last year (78.4 million liters). The European Union was the second largest source, with imports increasing ten percent (55.8 million liters in 2025). From Portugal, Brazil imported 27.9 million liters in 2025, with a spike in 2023. Italy, Spain, and France supplied smaller but steady volumes.

Argentina’s exports to Brazil grew 21 percent to 28,459 liters in 2025. Uruguay supplied half the volume of wine to Brazil in 2025 compared to 2020.

**Figure 10**

*Brazil Imports of Wine*



Source: TDM, chart elaborated by FAS Brasilia

**Wine Consumption**

The emerging domestic wine culture is fueled by the growth of wine tourism and a rising appreciation for products of Brazilian origin.

Red varieties such as Syrah, Cabernet Sauvignon, Touriga Nacional, and Tempranillo, as well as white varieties like Chenin Blanc, Sauvignon Blanc, and Muscat, dominate consumer preferences in the domestic wine market. Consumers prioritize high-quality products with exceptional flavor, aroma, and appearance, seeking options suitable for various occasions, including fresh consumption, juice processing, and the production of fine wines.

For juice processing, widely used public-domain grape cultivars include Isabel Precoce, BRS Cora, BRS Violeta, BRS Carmen, and BRS Magna. Isabel Precoce is valued for its early maturation and adaptability, while BRS Cora and BRS Violeta, both teinturier varieties, offer disease resistance and are ideal for blending. BRS Carmen is also used for juice and blending but requires early harvest to avoid cracking. BRS Magna stands out for its large clusters, high pigmentation, and suitability for both juice and wine.

**Attachments:**

No Attachments.