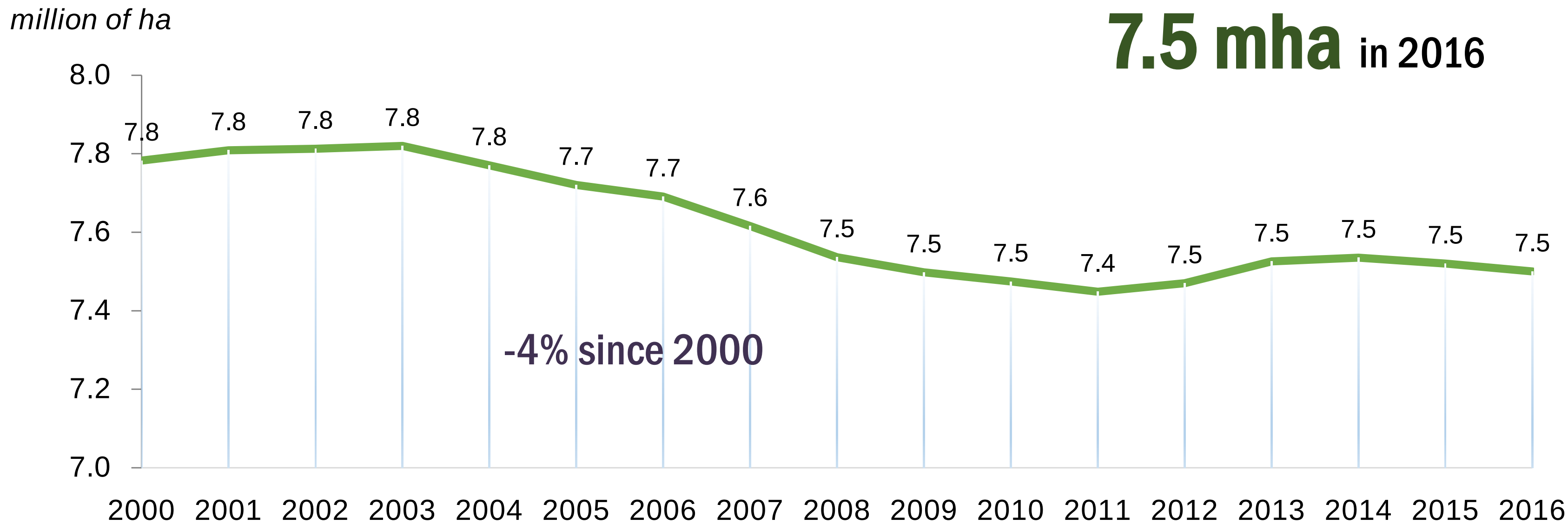
World vitiviniculture situation

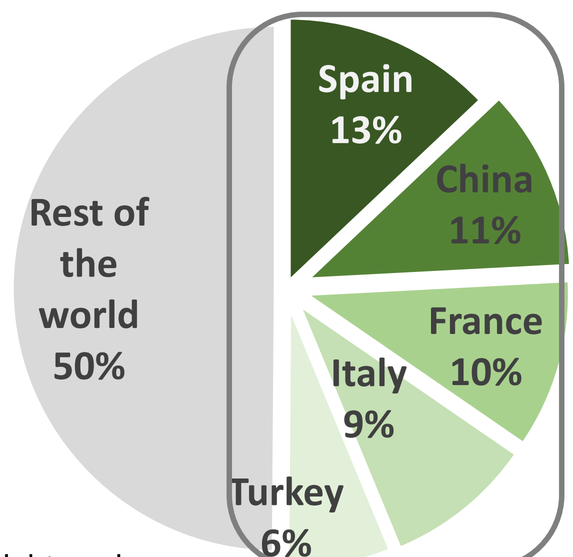
- **Surface area**
- **Grape**
  - *Global grape production*
  - *Table and dried grapes*
- **Wine**
  - *Production*
  - *Consumption*
  - *Trade*
- **2017 OIV Focus: Vine varietal distribution in the world**

Global area under vines

Area under vines in the world*

7.5 mha in 2016



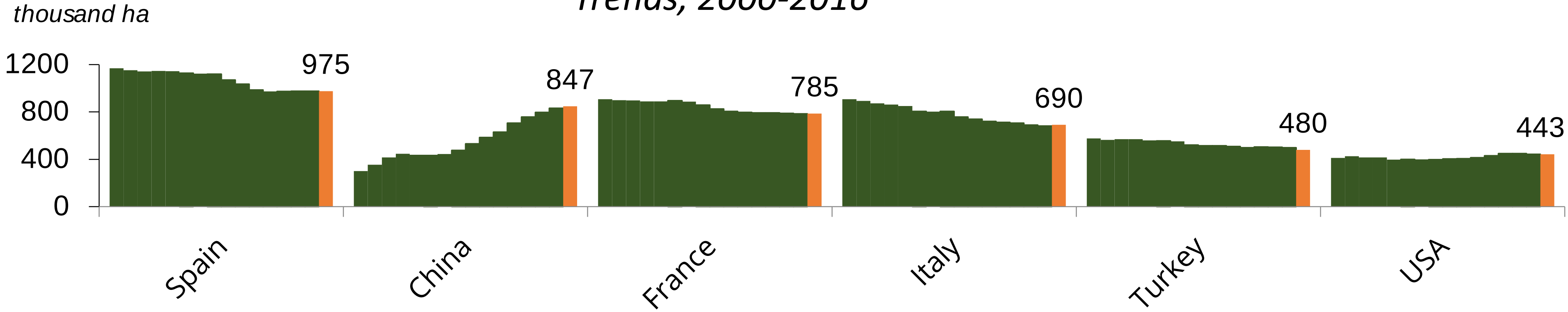


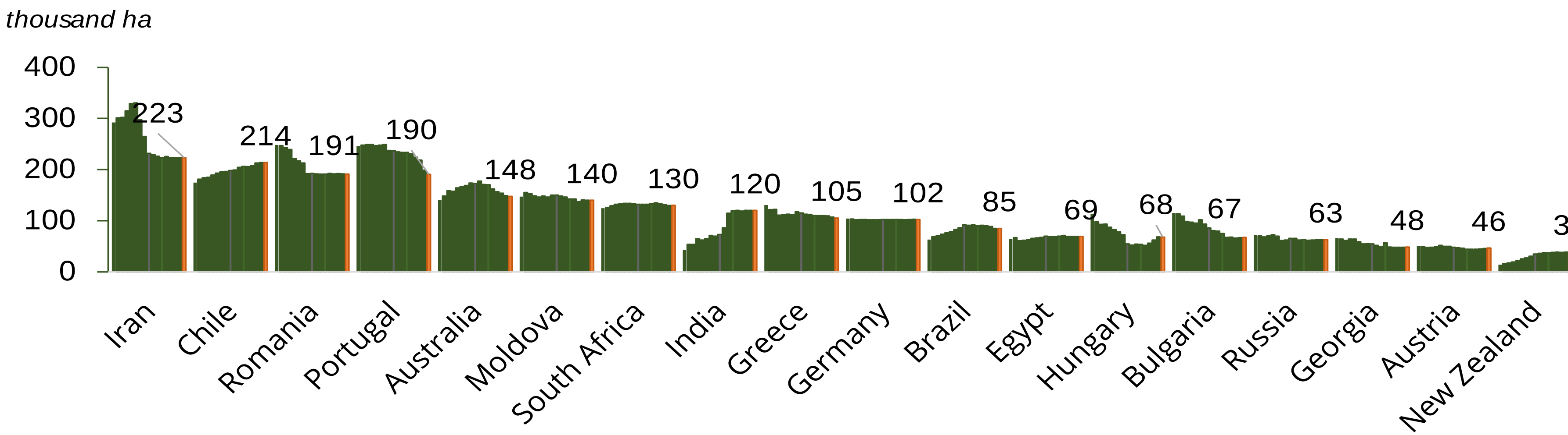
5 countries represent **50%** of world vineyard

*Area under vines destined for the production of wine grapes, table grapes or dried grapes, in production or awaiting production.

Area under vines*

Trends, 2000-2016





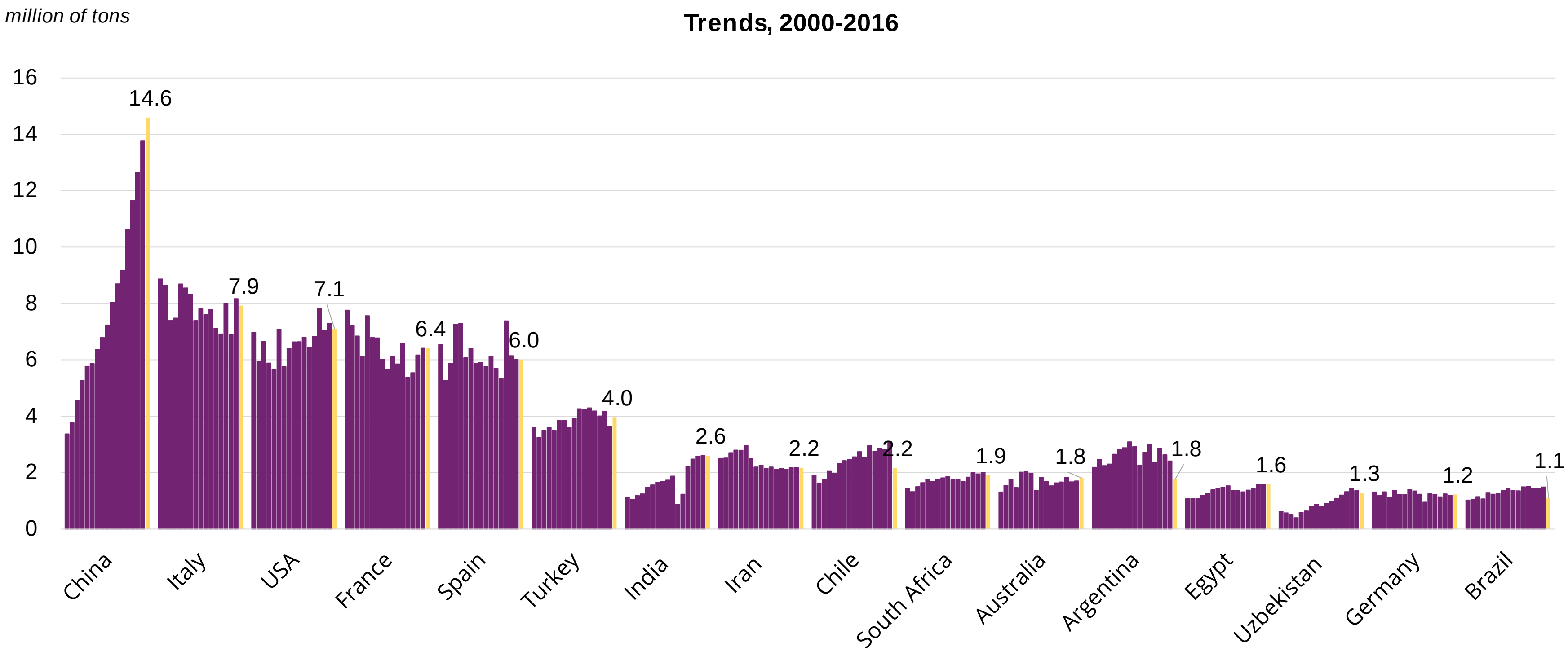
Since 2000 area under vines is:

- **decreasing** in most of the european countries, Turkey and Iran
- **increasing in China, India, Chile** and **New Zealand**
- **stable** in the **USA** and in the last year in **Spain** and **France**

*Area under vines destined for the production of wine grapes, table grapes or dried grapes, in production or awaiting production.

Grape

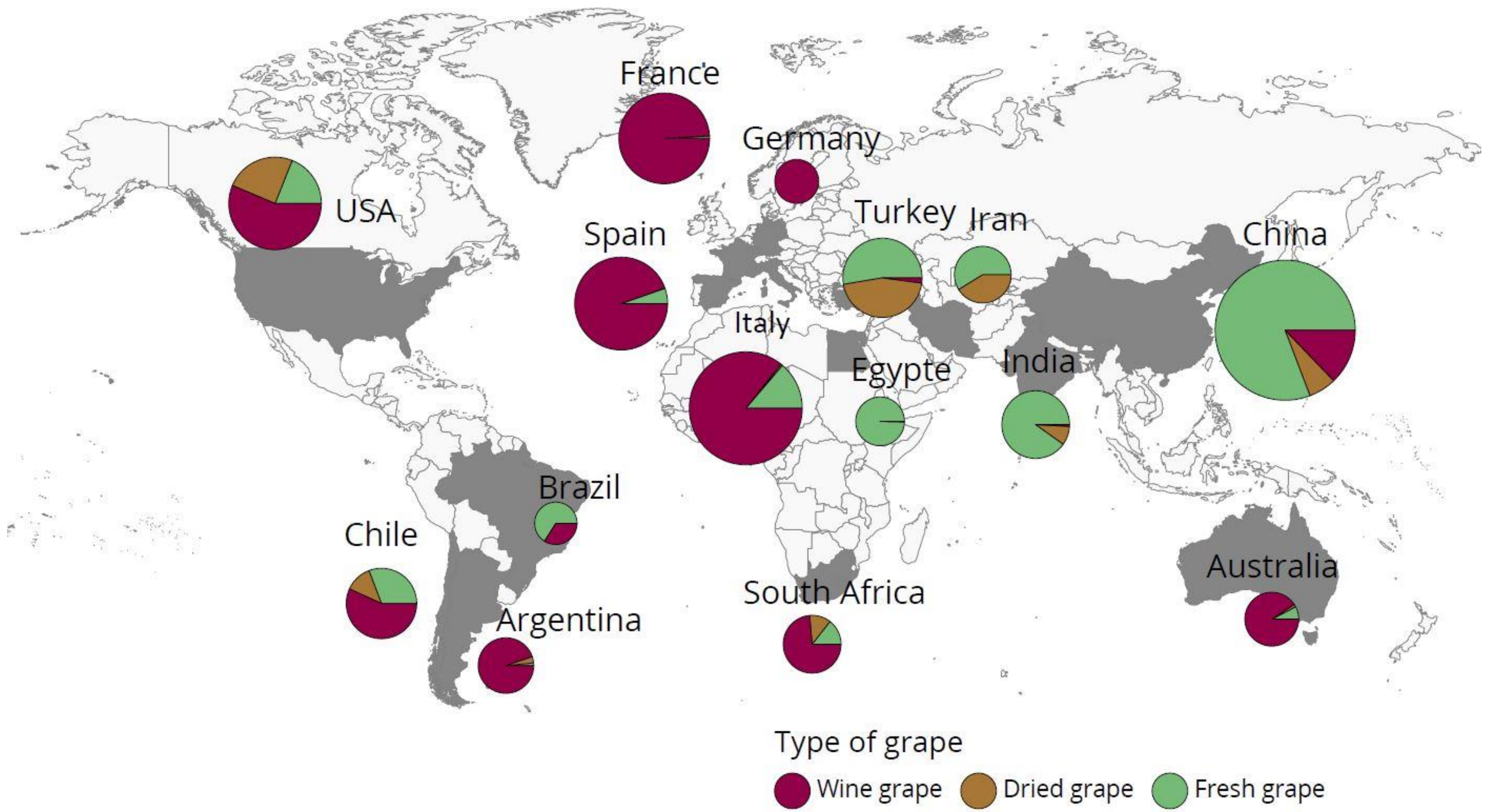
Major grapes producers: all use



Since 2000:

- **Growth** in grapes production is particularly significant in China, India, Uzbekistan and Chile
- **Is decreasing** in Italy, France, Spain and Iran

Major grape producers by type of products*



*excluding juices & musts

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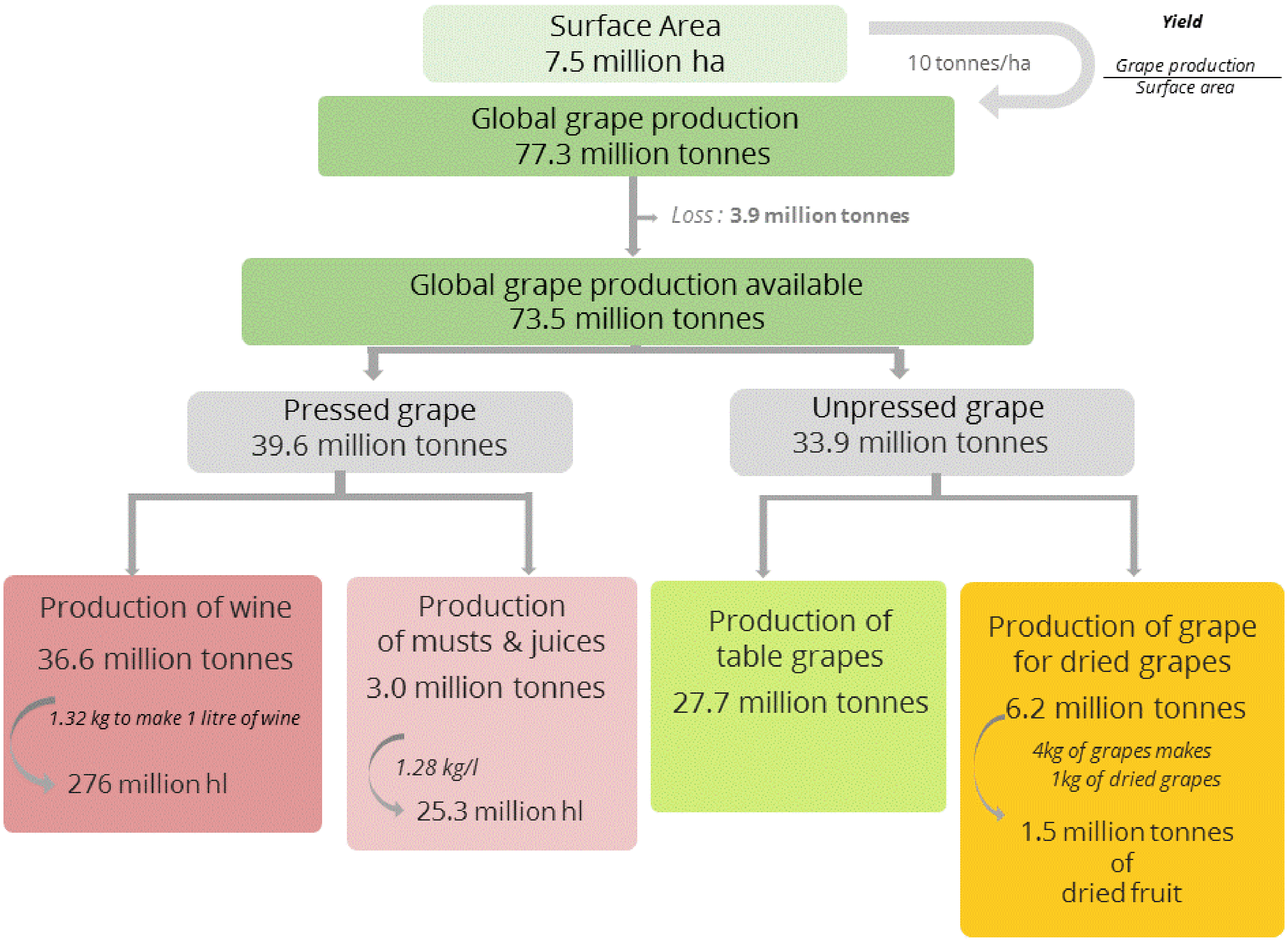
What happens to the 77 million tons of grapes grown in the word?

(2015)



Food and Agriculture Organization of the United Nations

International Organisation of Vine and Wine
Intergovernmental Organisation

TABLE AND DRIED GRAPES

FAO-OIV FOCUS 2016

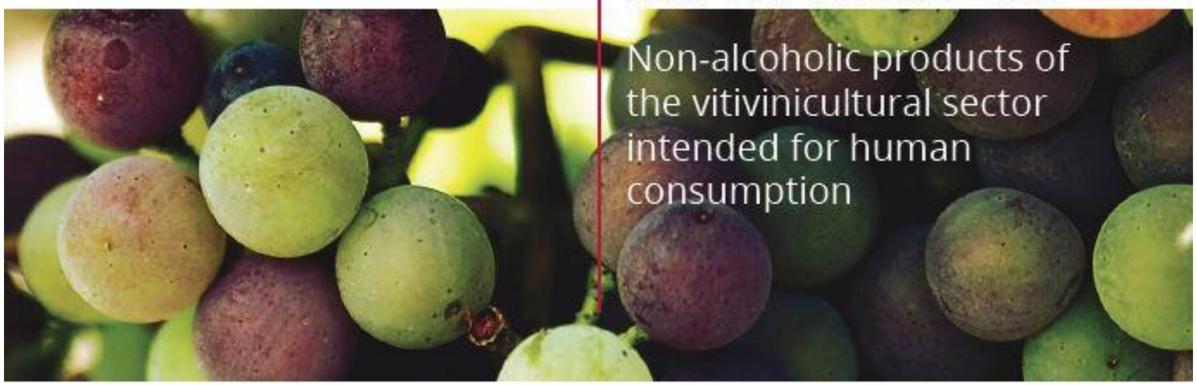


Table grapes production

27 million of tons in 2014

+ 71% since 2000

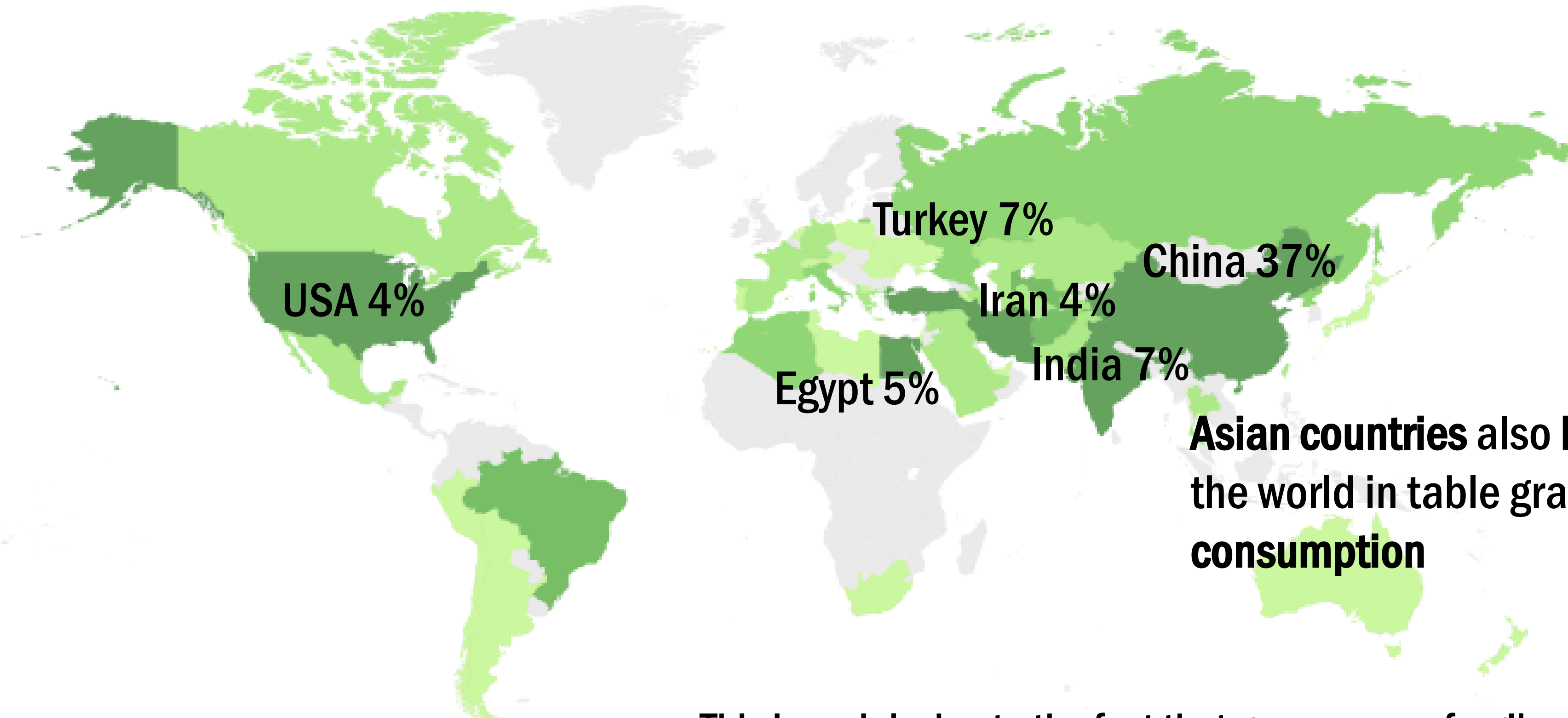
China is a major contributor to the growth of world production. Between 2000 and 2014, table grape production in China grew by more than 80%.

OIV
Organisation Internationale de la Vigne et du Vin

Table grapes consumption

27 million of tons in 2014

+ 73% since 2000

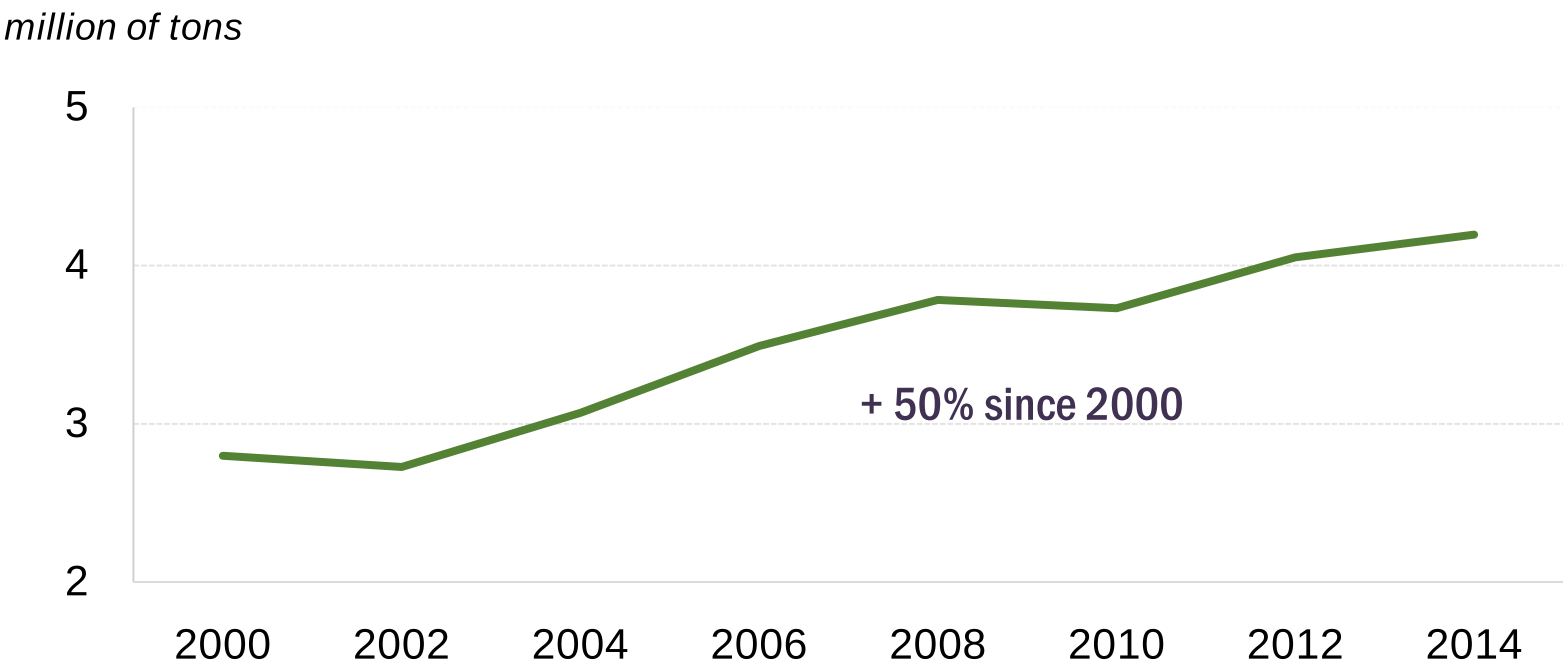


Asian countries also **lead** the world in table grape **consumption**

This is mainly due to the fact that grapes are a fragile and highly perishable product and they are most likely to be consumed close to where they are produced.

Table Grapes export

4.2 million tons: the world export in 2014



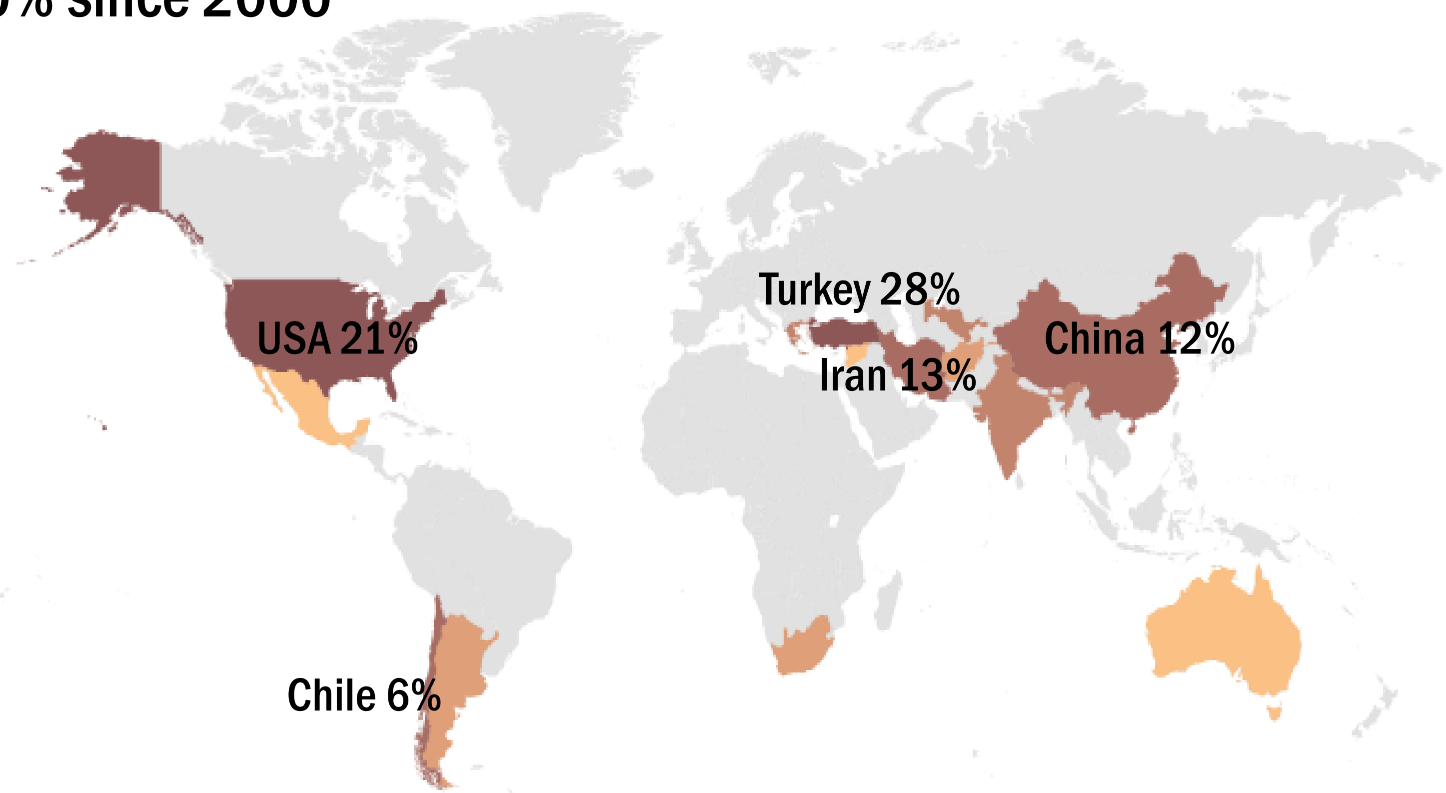
- Trade of grapes is growing thanks to progress made in cultivation and storage techniques: **increased by about 50% over the past 15 years, reaching 4.2 million tonnes in 2014**

- Growth was particularly driven by the emergence of **new players in table grape trade**, such as **South Africa and Peru**

Dried grapes production

1.5 million tons in 2014

+10% since 2000

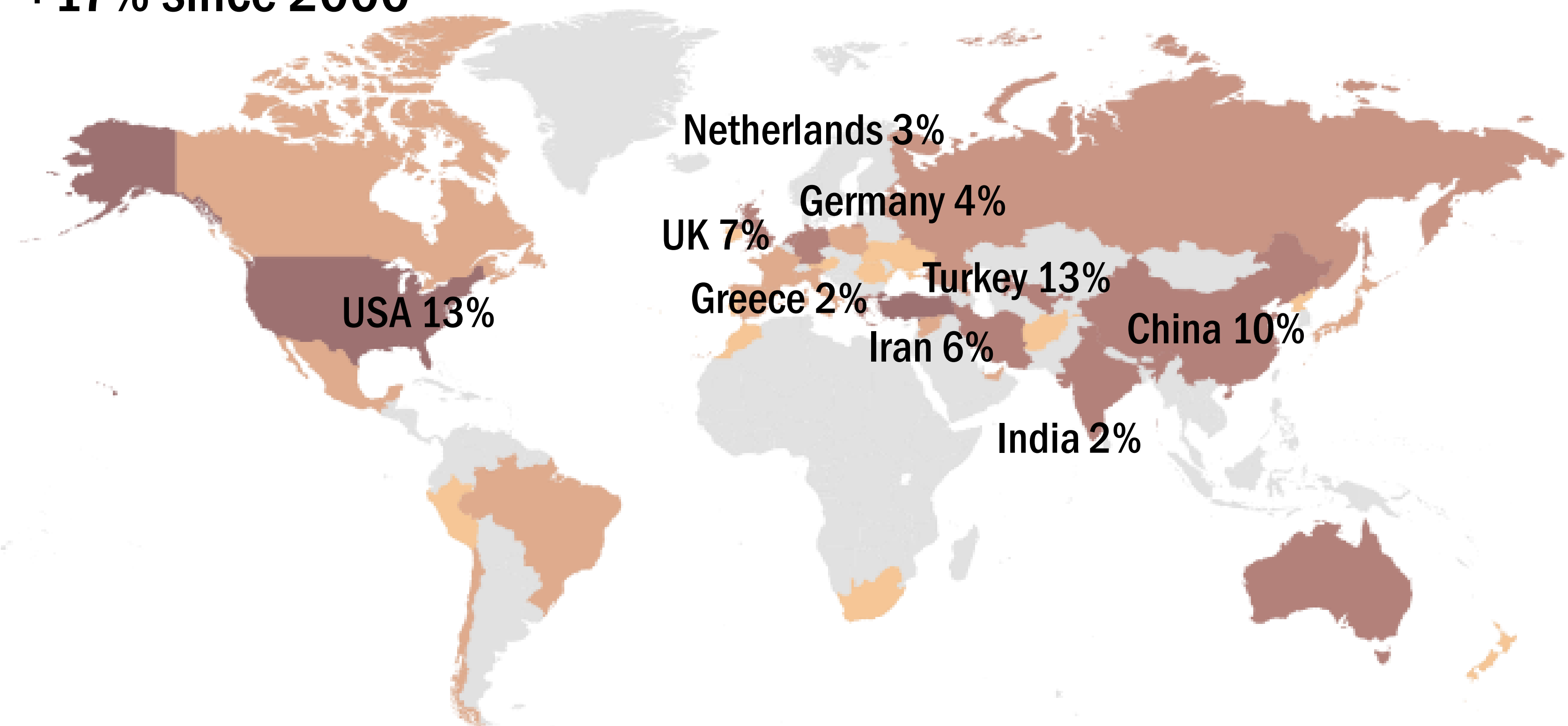


Turkey and **USA** dominate global dried grapes production

Dried grapes consumption

USA and Turkey are the **leading domestic markets**, accounting for one quarter of global consumption

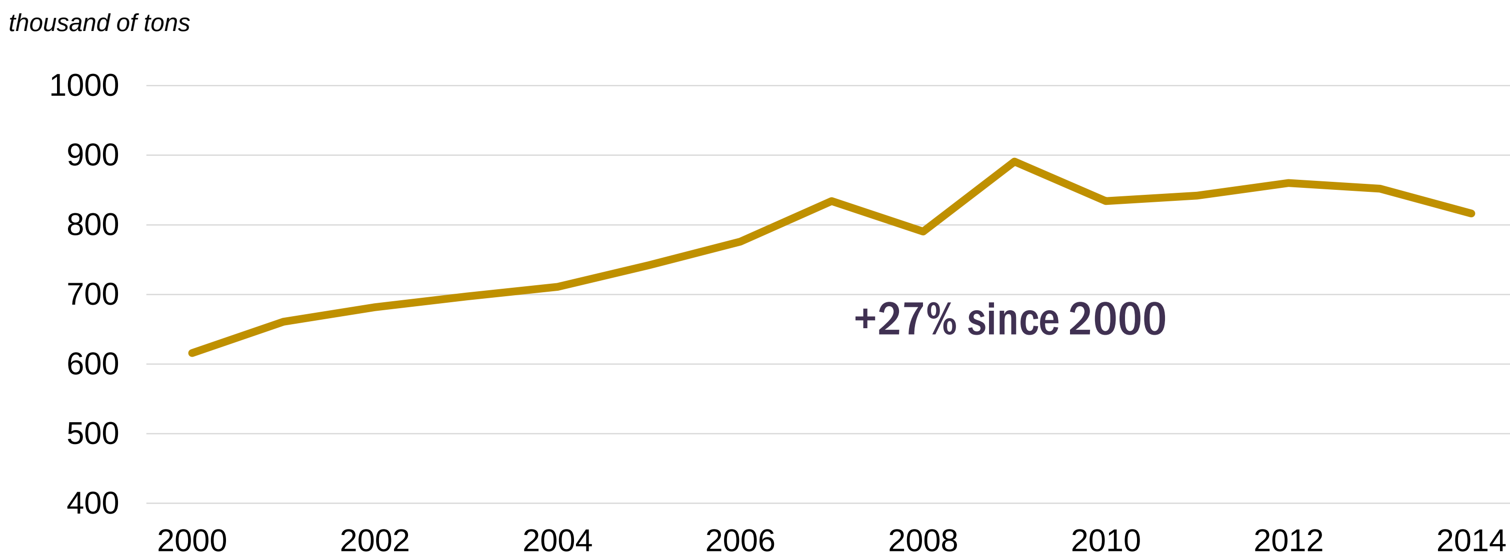
1.6 million tons in 2014
+17% since 2000



Although **Europe** is only a minor producer, it accounts for **33% of world consumption**

Dried Grapes export

More than 1 million of tons in 2014



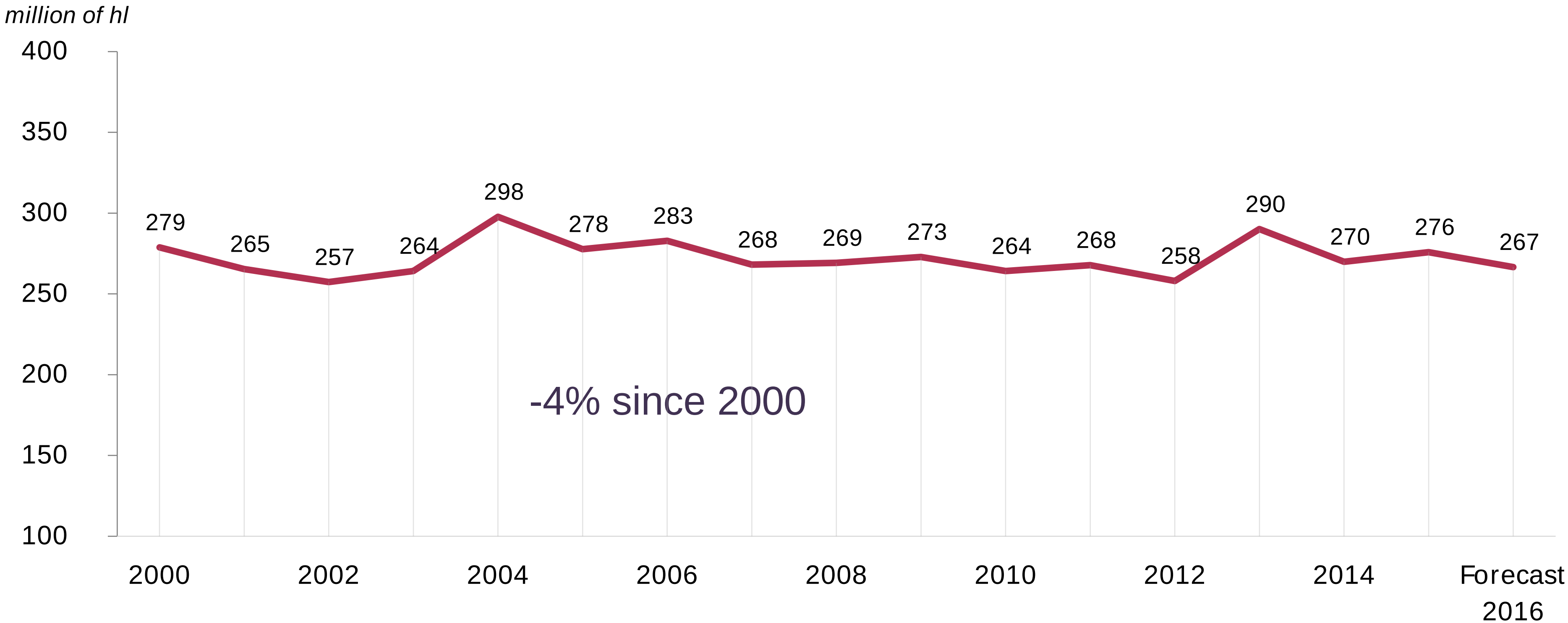
Dried grape is the **most heavily traded product in the sector** (63% of total consumption):

- **Turkey** is the **largest exporter** of raisins with more than half of local production exported
- the **EU** is the **leading importer market**
- **India and China** are major producers, but **not yet major exporters**

Wine production

World wine production

267 mhl in 2016



- **2016 world wine production** (excluding juice & musts) **decreased by 3%** compared with the previous year
- unfavourable climate conditions weighed on productions in different countries

Wine production in 2016

Wine production

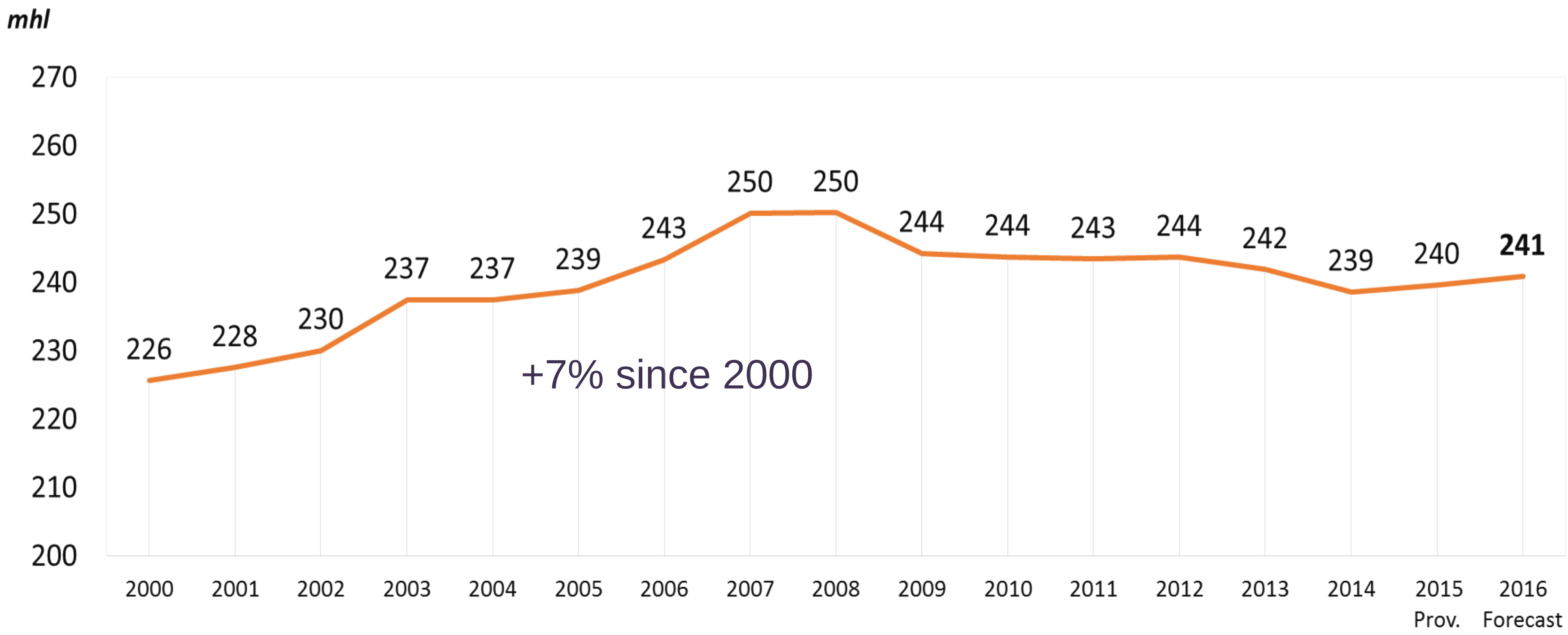
excluding juice and musts

	mhl	2012	2013	2014	2015	Forecast 2016	2016/2015 Variation in volume	2016/2015 Variation in %
1	Italy	45.6	54.0	44.2	50.0	50.9	0.9	2%
2	France	41.5	42.1	46.5	47.0	43.5	3.9	-7%
3	Spain	31.1	45.3	39.5	37.7	39.3	13.2	4%
4	USA	21.7	24.4	23.1	21.7	23.9	29.2	10%
5	Australia	12.3	12.3	11.9	11.9	13.0	39.0	9%
6	China	13.5	11.8	11.6	11.5	11.4	39.4	-1%
7	South Africa	10.6	11.0	11.5	11.2	10.5	39.7	-6%
8	Chile	12.6	12.8	10.0	12.9	10.1	38.1	-21%
9	Argentina	11.8	15.0	15.2	13.4	9.4	37.6	-29%
10	Germany	9.0	8.4	9.2	8.9	9.0	42.0	1%
11	Portugal	6.3	6.2	6.2	7.0	6.0	43.9	-15%
12	Russia	6.2	5.3	4.9	5.6	5.6	45.3	0%
13	Romania	3.3	5.1	3.7	3.5	3.3	47.4	-8%
14	New Zealand	1.9	2.5	3.2	2.3	3.1	48.6	34%
15	Greece	3.1	3.3	2.8	2.5	2.6	48.4	2%
16	Serbia	2.2	2.3	2.3	2.3	2.3	48.6	0%
17	Austria	2.1	2.4	2.0	2.3	2.0	48.7	-14%
18	Hungary	1.8	2.6	2.6	3.0	1.9	47.9	-38%
19	Moldova	1.5	2.6	1.6	1.7	1.7	49.2	0%
20	Brazil	3.0	2.7	2.7	3.5	1.6	47.4	-55%
21	Bulgaria	1.3	1.7	0.7	1.3	1.2	49.6	-8%
22	Georgia	0.8	1.0	1.1	1.3	1.1	49.6	-16%
23	Switzerland	1.0	0.8	0.9	0.9	1.0	50.1	18%
	World total	**258**	**290**	**270**	**276**	**267**	**-9**	**-3%**

Wine Consumption

World wine consumption

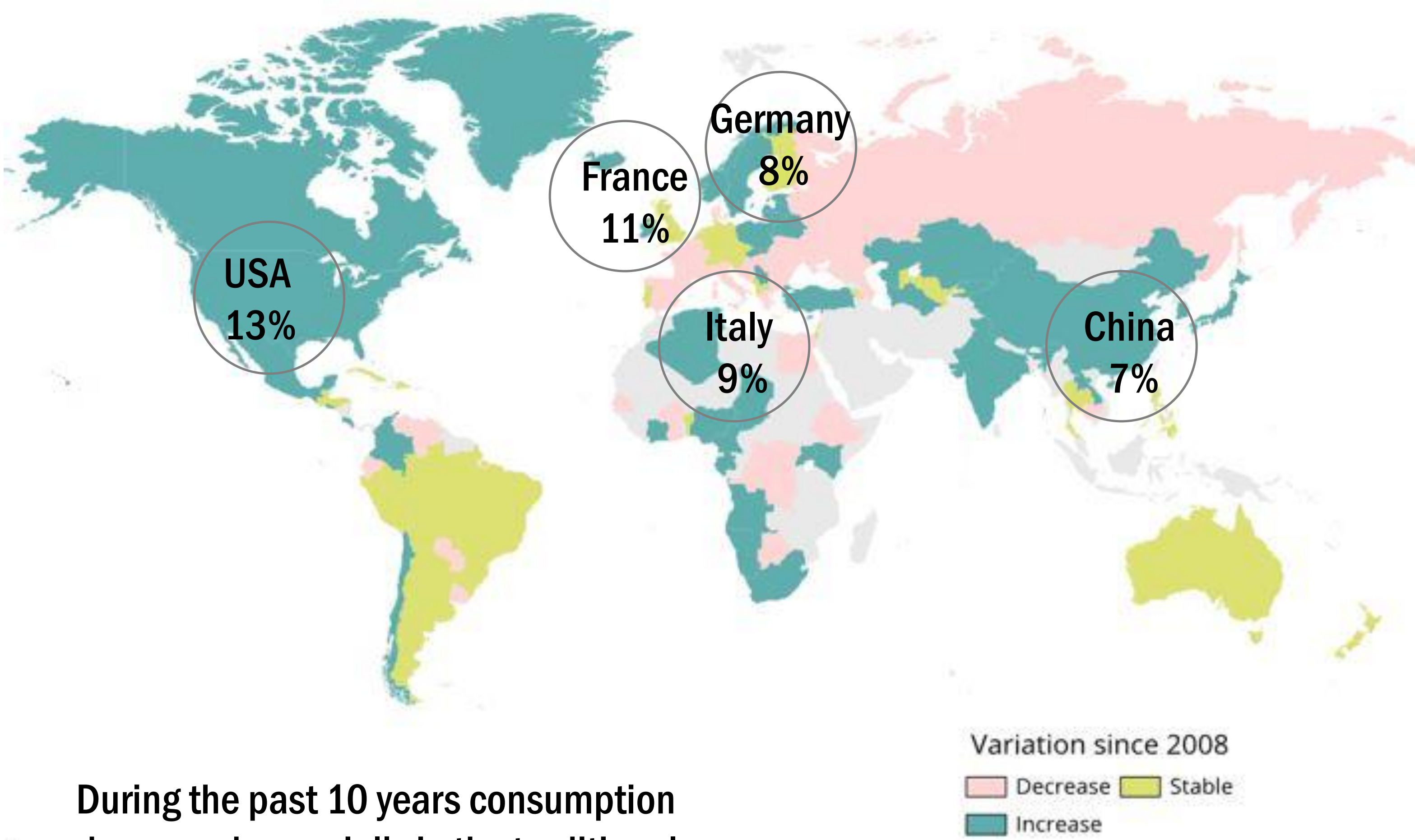
241 mhl in 2016



Since the beginning of the economic and financial crisis of 2008, global consumption seems to have stabilized: **wine consumption** stood at **241 mhl in 2016**

Wine consumption in the world

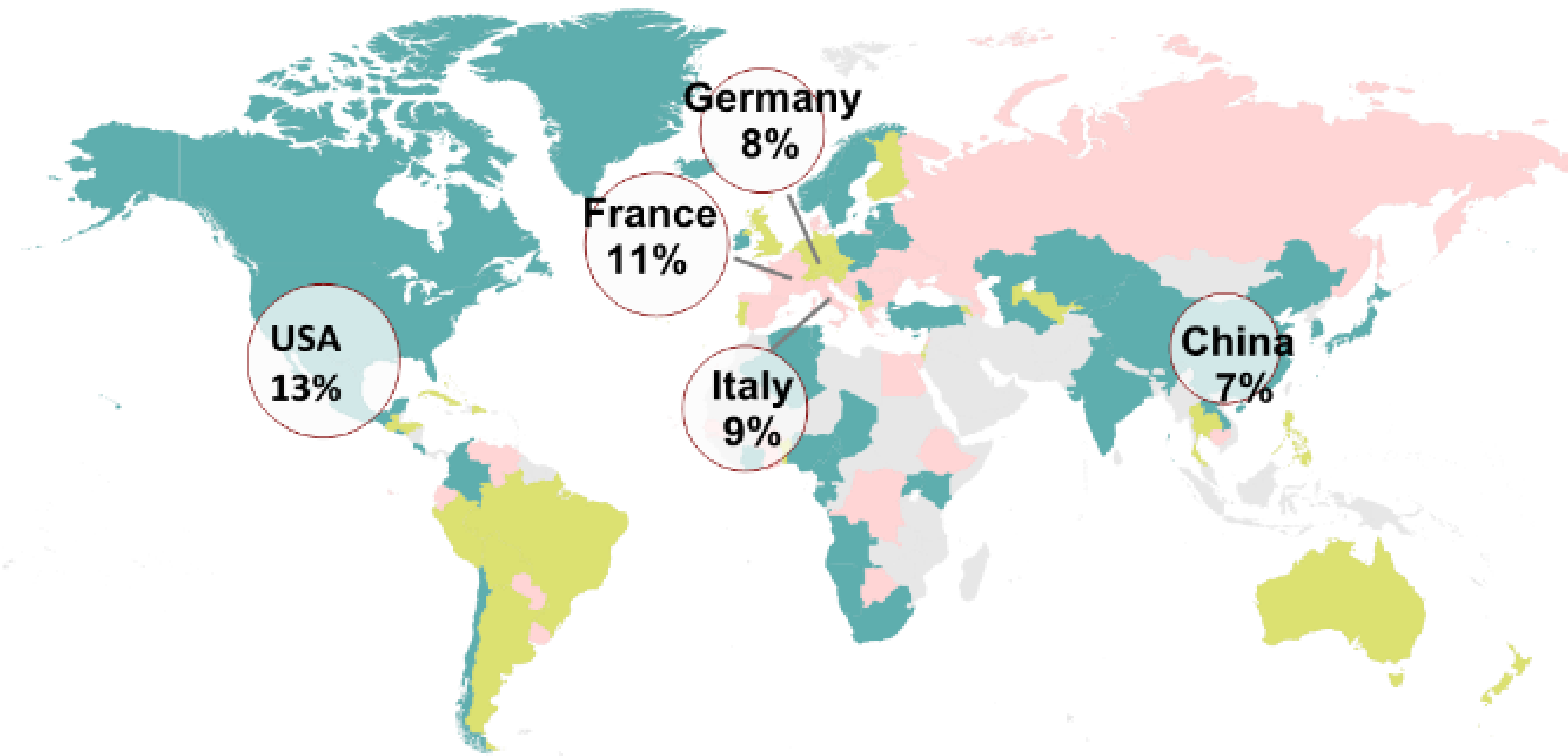
5 countries consume almost half of the wine of the world



During the past 10 years consumption decreased especially in the traditional wine countries

Wine consumption in the world

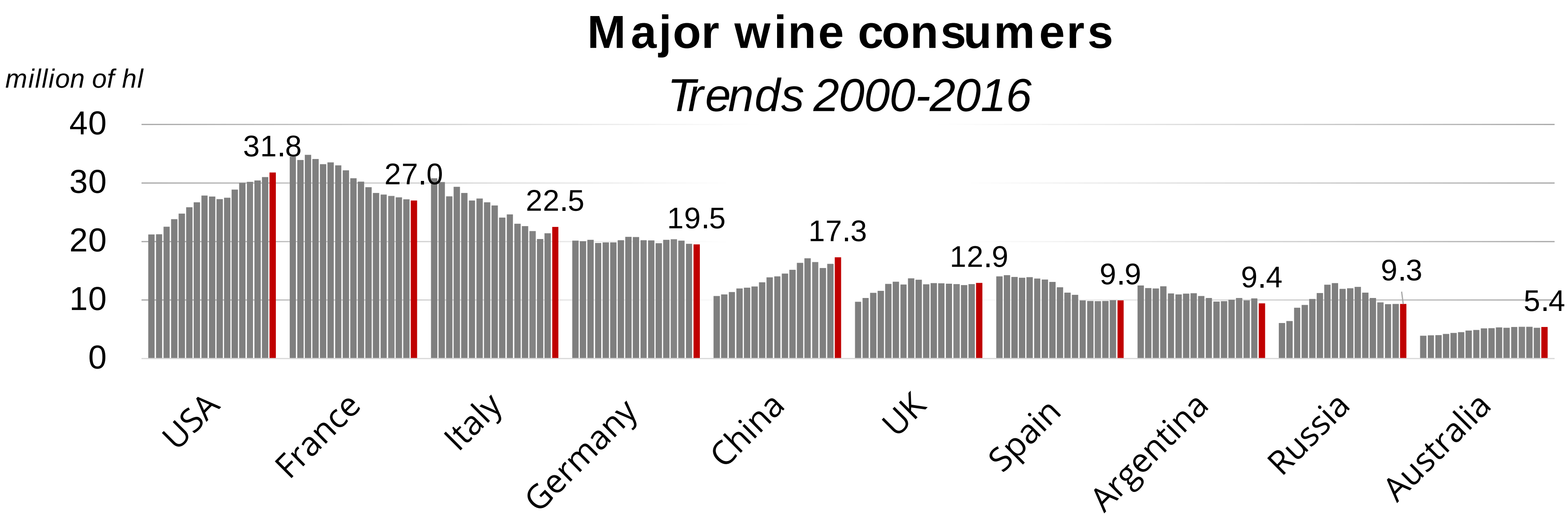
5 countries consume half of the wine of the world



During the last 10 years wine consumption decreased especially in the traditional wine countries

© OIV

Wine consumption



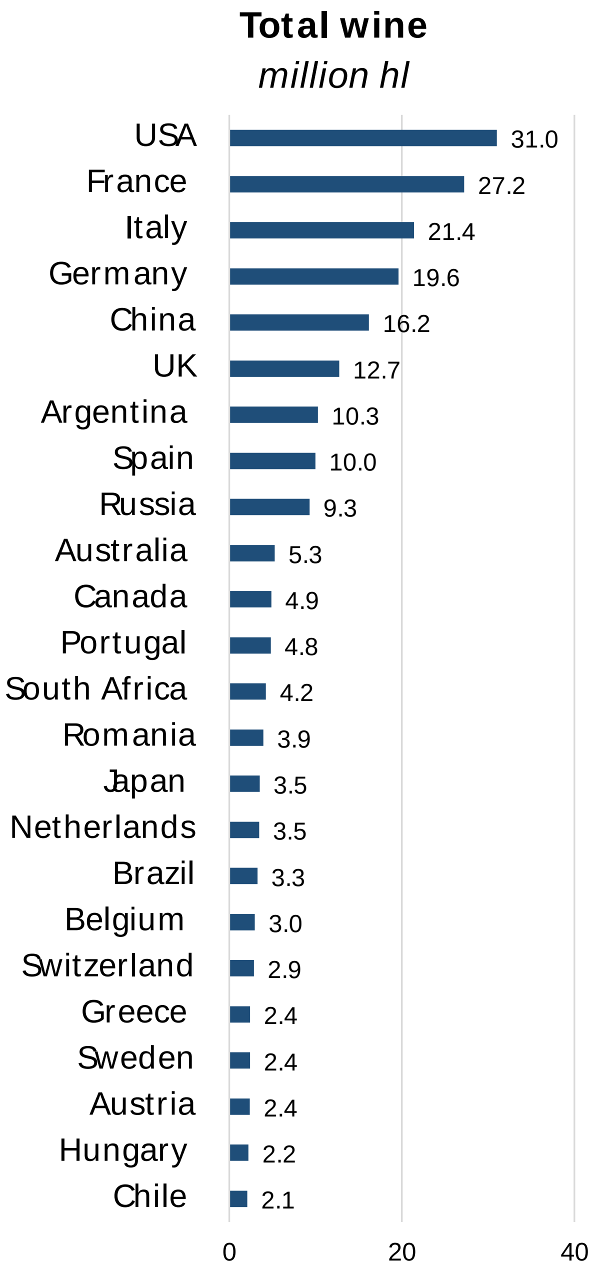
- **USA** confirmed its position as the biggest global consumer country since 2011 (**31.8 mhl**)
- Slightly increase in **Italy** (**22.5 mhl**) and in **China** (**17.3 mhl**)
- Consumption is stable in **France** (**27.0 mhl**), **Spain** (**9.9 mhl**) and **Russia** (**9.3 mhl**)

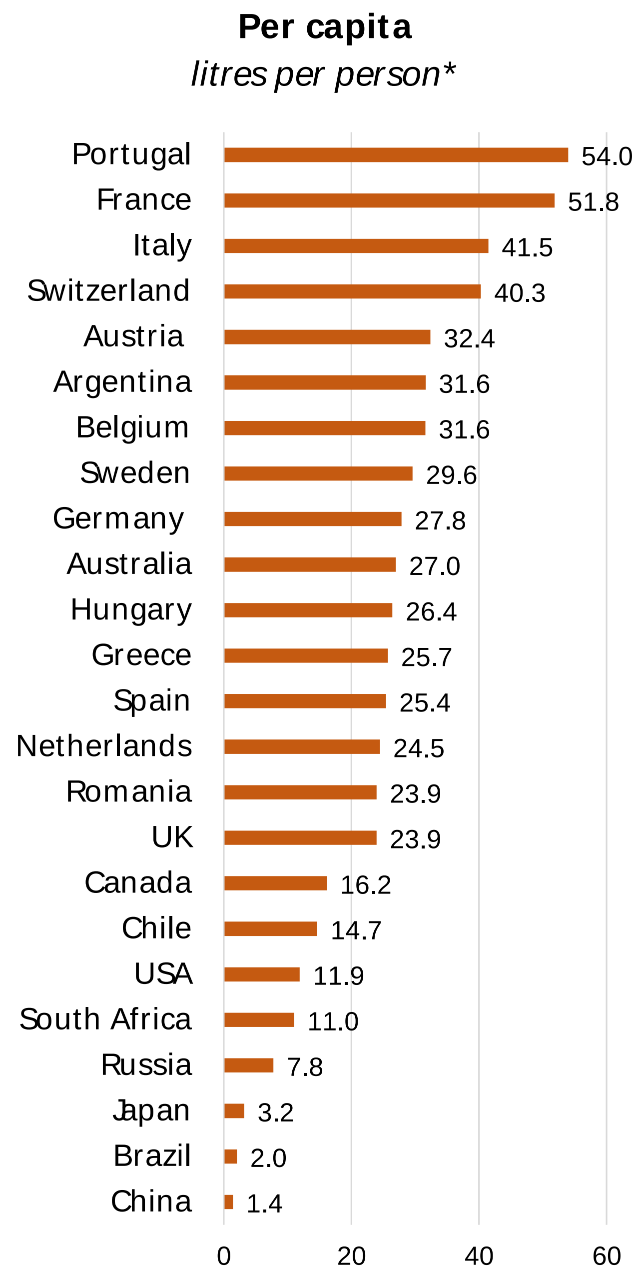
Main wine-consuming countries

	mhl	2012	2013	2014	2015	Forecast 2016	2016/2015 Variation in volume	2016/2015 Variation in %
1	USA	30.0	30.2	30.4	31.0	31.8	0.8	2.5%
2	France	28.0	27.8	27.5	27.2	27.0	-0.2	-0.7%
3	Italy	21.6	20.8	19.5	21.4	22.5	1.1	5.3%
4	Germany	20.3	20.4	20.2	19.6	19.5	-0.1	-0.5%
5	China*	17.1	16.5	15.5	16.2	17.3	1.1	6.9%
6	UK	12.8	12.7	12.6	12.7	12.9	0.2	1.4%
7	Spain	9.9	9.8	9.9	10.0	9.9	0.0	-0.4%
8	Argentina	10.1	10.4	9.9	10.3	9.4	-0.9	-8.3%
9	Russia	11.3	10.4	9.6	9.3	9.3	0.0	0.3%
10	Australia	5.4	5.4	5.4	5.3	5.4	0.1	2.4%
11	Canada	4.9	4.9	4.7	4.9	5.0	0.1	3.1%
12	Portugal	5.0	4.2	4.3	4.8	4.6	-0.2	-4.6%
13	South Africa	3.6	3.7	4.0	4.2	4.4	0.1	3.1%
14	Romania	4.3	4.6	4.7	3.9	3.8	-0.2	-4.5%
15	Japan	3.1	3.4	3.5	3.5	3.5	0.0	-0.3%
16	Netherlands	3.5	3.5	3.4	3.5	3.4	-0.1	-2.3%
17	Belgium	2.9	2.9	2.7	3.0	3.0	0.0	1.1%
18	Brazil	3.2	3.5	3.5	3.3	2.9	-0.4	-12.0%
19	Switzerland	2.7	2.7	2.8	2.9	2.8	-0.1	-1.8%
20	Austria	2.7	2.8	3.0	2.4	2.4	0.0	2.0%
21	Serbia	2.3	2.3	2.4	2.4	2.4	0.0	-0.9%
22	Sweden	2.3	2.4	2.3	2.4	2.3	-0.1	-3.3%
23	Greece	3.1	3.0	2.6	2.4	2.3	-0.1	-4.4%
24	Chile	3.2	2.9	3.0	2.1	2.2	0.1	4.8%
25	Hungary	2.0	1.9	2.2	2.2	1.9	-0.3	-12.7%
26	Denmark	1.5	1.6	1.6	1.6	1.6	0.0	0.0%
27	Croatia	1.4	1.4	1.2	1.1	1.2	0.1	6.7%
28	Poland	0.9	0.9	1.0	1.1	1.1	0.1	4.9%
29	Bulgaria	1.0	0.8	0.9	1.0	1.0	0.0	3.4%
	World total	**244**	**242**	**239**	**240**	**241**	**1.0**	**0.4%**

* Apparent consumption calculated by "Production + Imports - Exports"

Wine consumption 2015





* UN database Population 15+ years

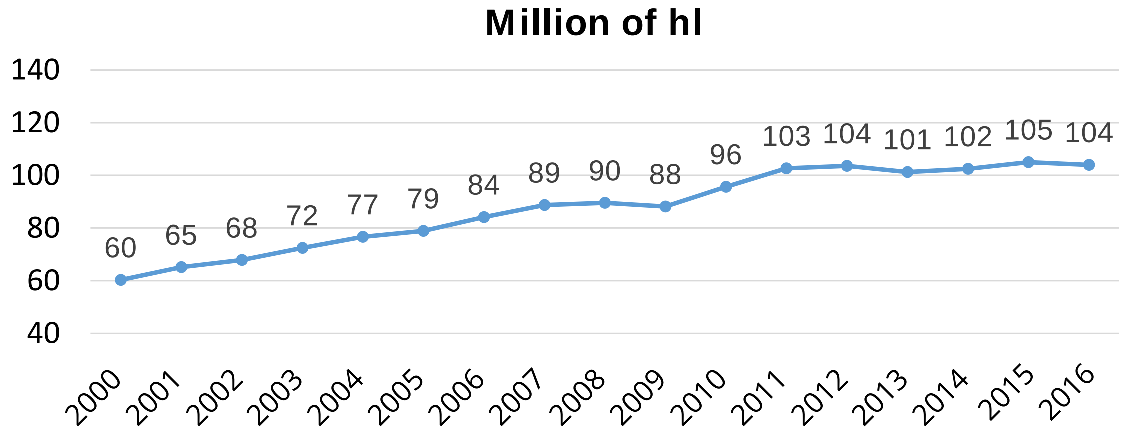
Trend in consumption

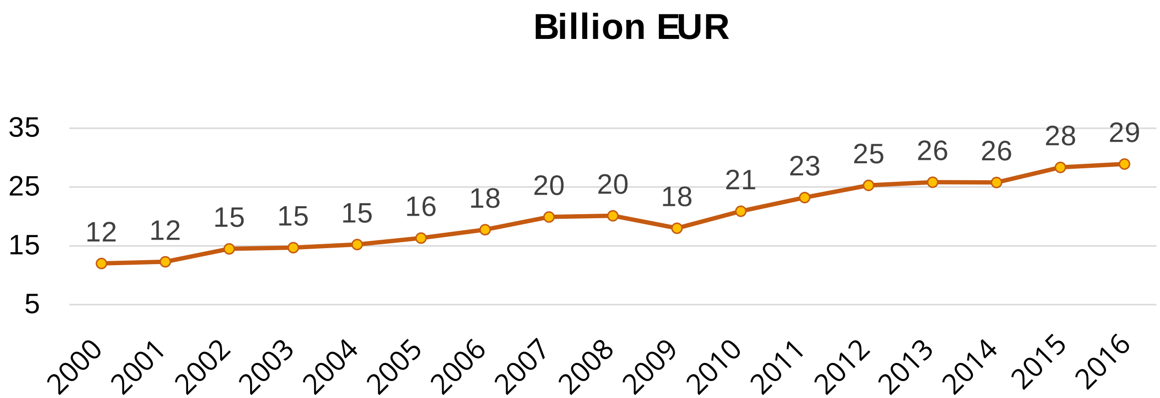
Traditional markets	Mature markets	Increasing markets	Emerging markets
Decreasing per capita consumption from high base	Long term high growth trend; stable or decreasing per capita consumption	Long term growth trend in total market, but still low per capita consumption	Significant growth, but very low per capita consumption
France Italy Spain Germany Argentina Etc.	USA Canada Australia Norway Sweden Etc.	China Brazil Mexique Japan South Korea Etc.	Mexico Nigeria Namibia India Peru Etc.

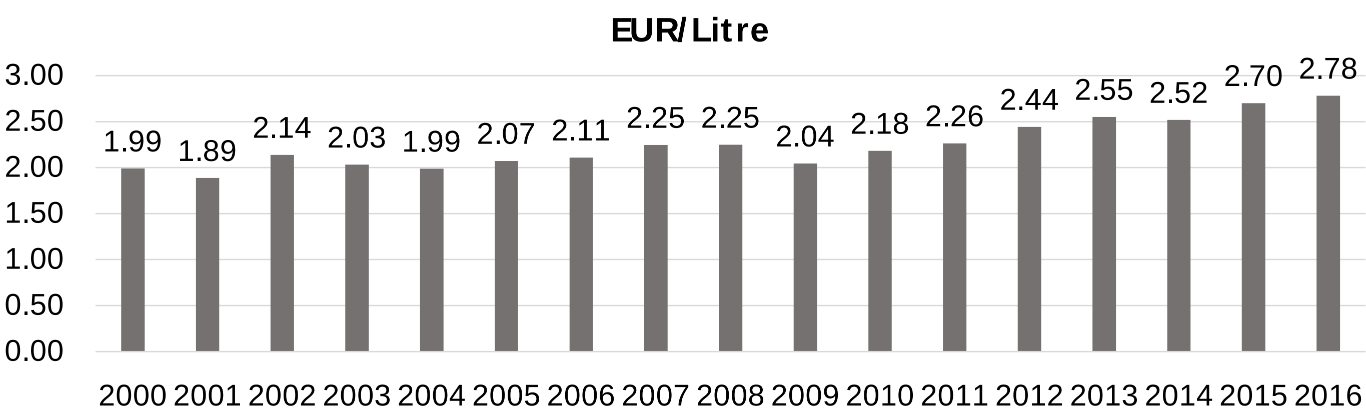
International Organisation of Vine and Wine

Wine trade

Less wine traded, though more expensive







Between 2015 and 2016 **world wine export:**

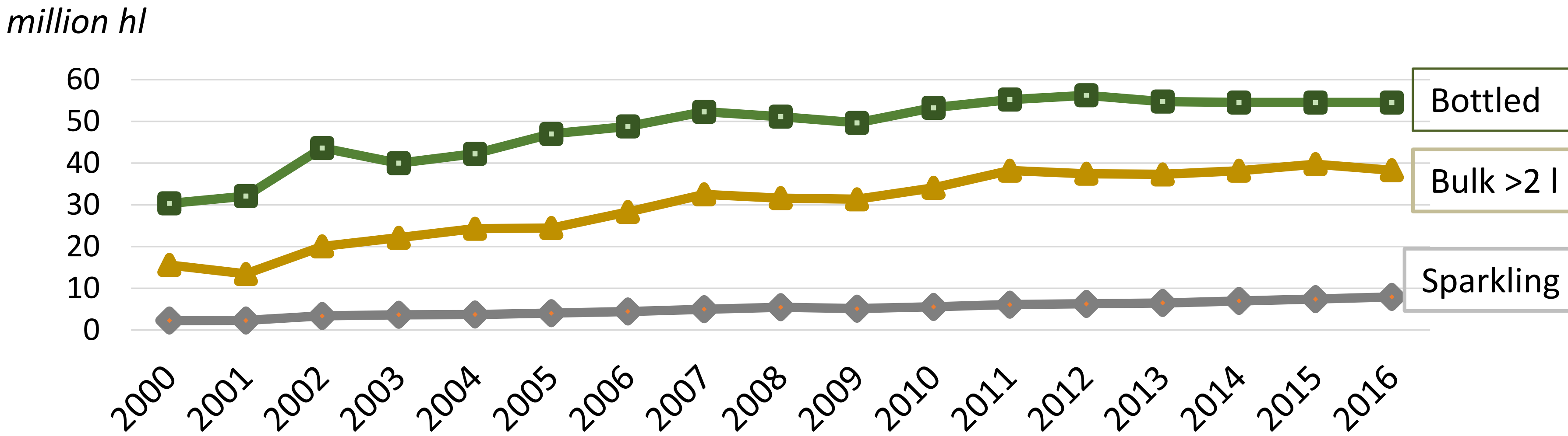
decreased by 1.2% in volume **(104 million hl)**

increased by 2.0 % in value **(29 Billion EUR)**

verage value by litre up by 3.0%

By type of product

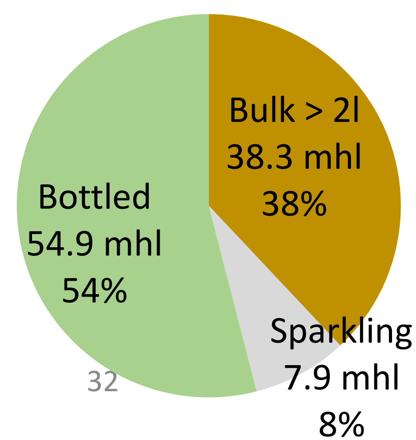
Evolution of the exports by type of product in volume



The composition of exports:

- <u>bottled wines</u> stable over the last 4 years
- <u>bulk wines</u> slight decrease (–4%/2015)
- <u>sparkling wines</u> continue to increase (+7% /2015)

Part in the exports by type of product in volume 2016



HS new subheading

22.04 **Wine of fresh grapes, including fortified wines; grape must other that of heading 20.09**

2204.10 - Sparkling wine

2204.21 - In containers holding 2 l or less

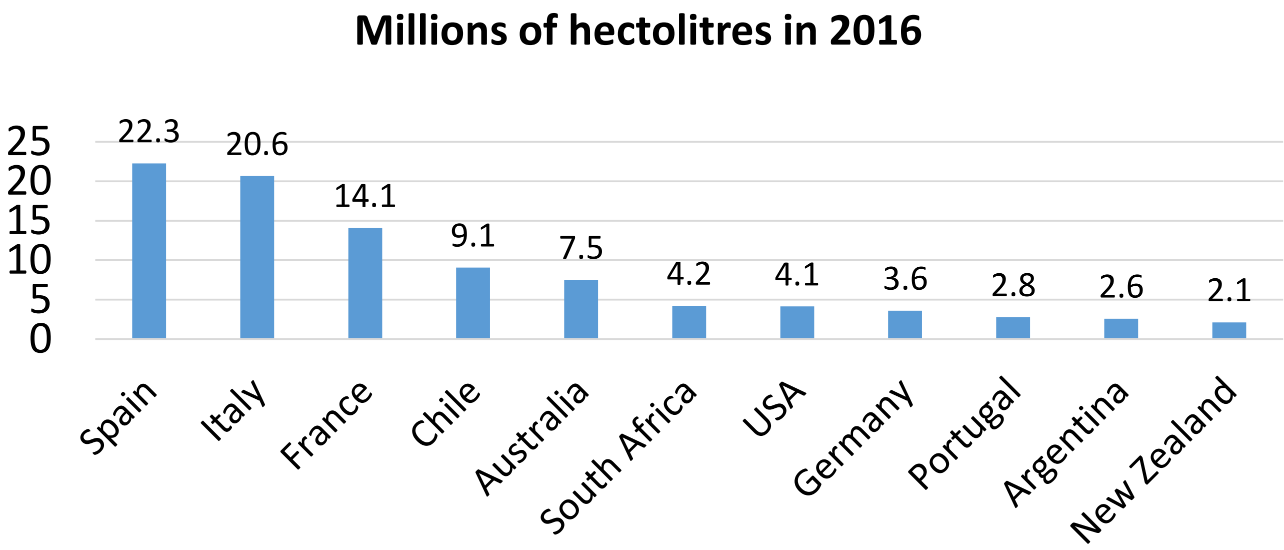
2204.22 - In containers holding more than 2 l but not more than 10 l

2204.29 - Other

2204.30 – Other grape must

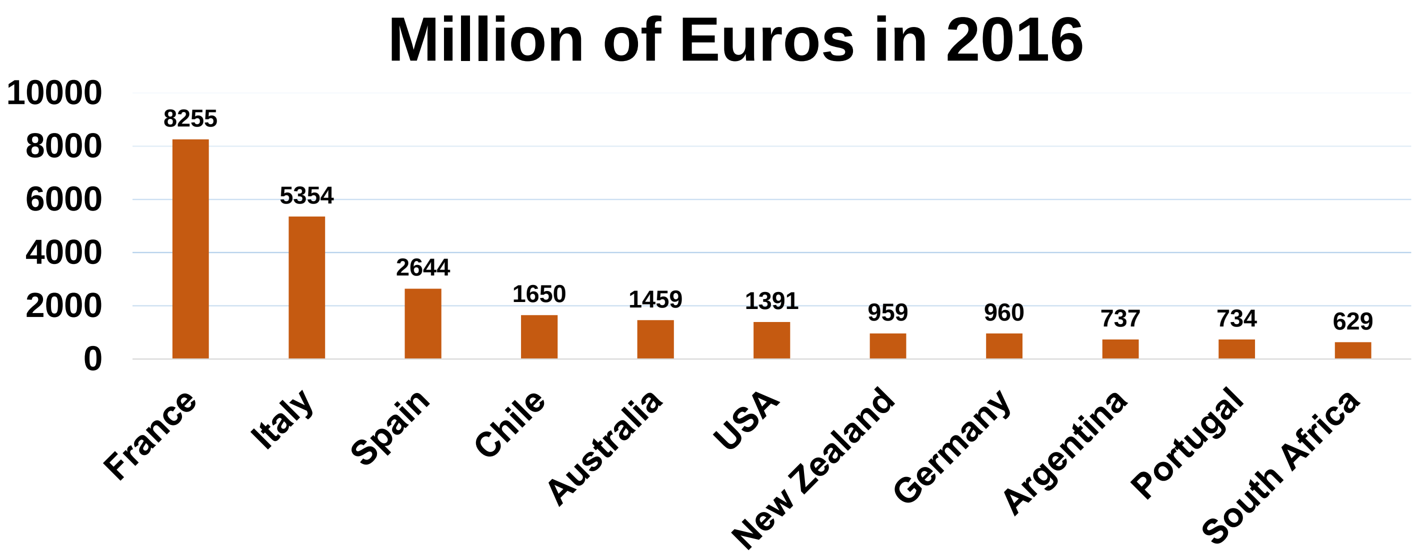
The new subheading will add **further transparency and clarity** to the data gathering in view of the statistics analysis of the sector, to identify the wine actually in bulk from the one which is delivered to consumers in containers (the bag-in-box)

Top world exporters

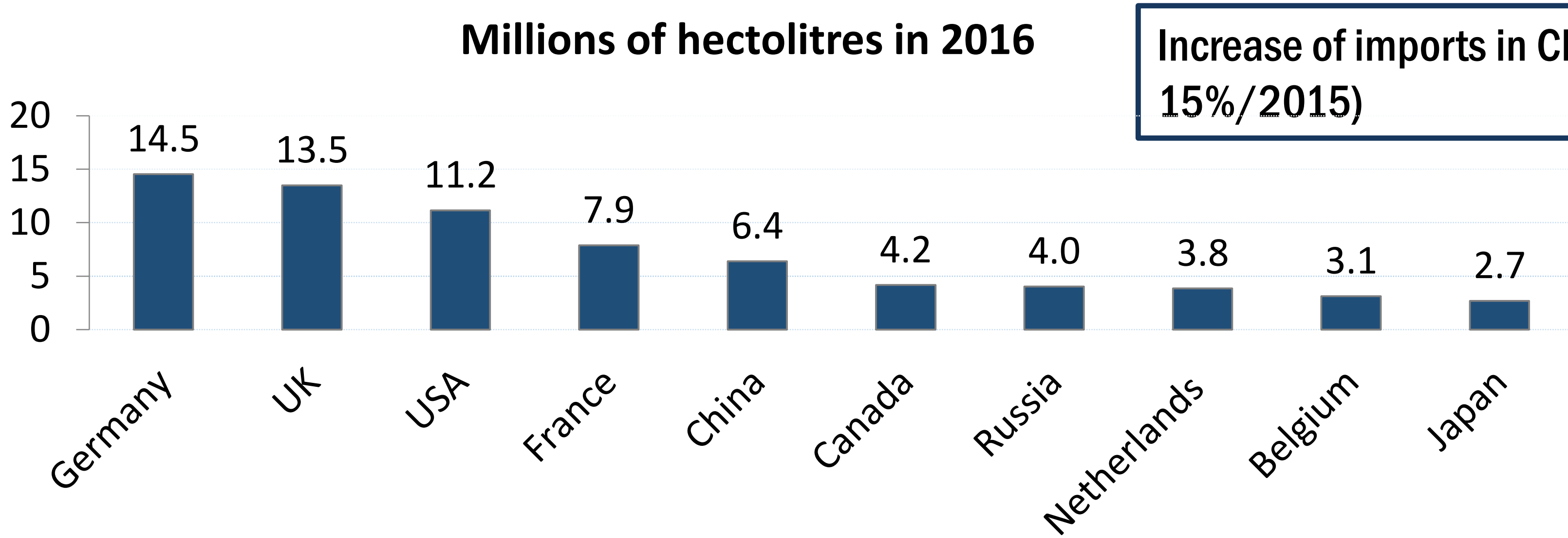


Export is widely dominated by Spain, Italy and France representing 55 % of the volume of the world market

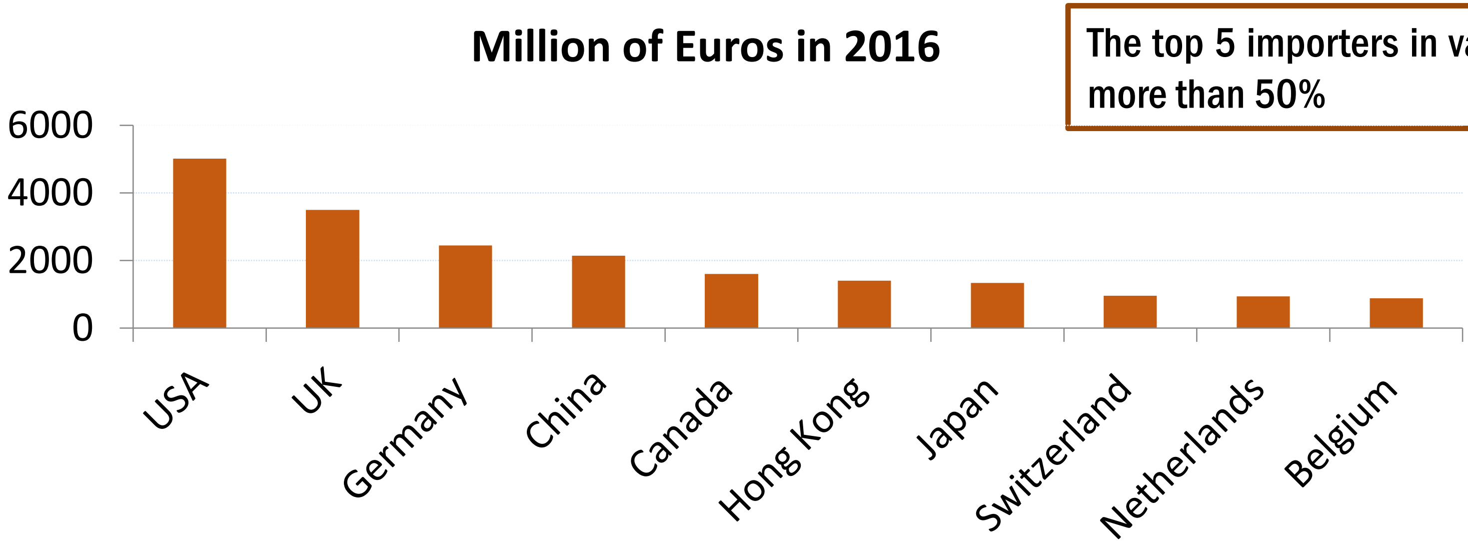
In value, France and Italy continue to dominate the market with respectively 28 % and 19 %



Top world Importers



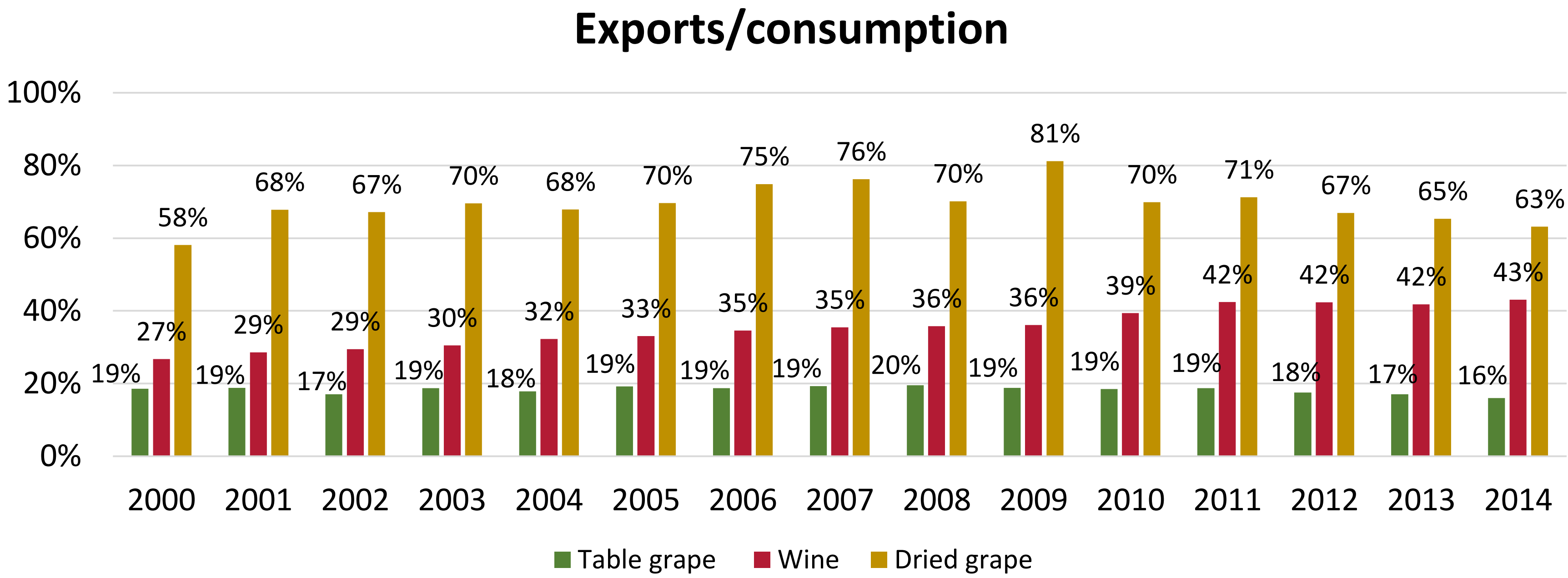
Increase of imports in China (+ 15%/2015)



The top 5 importers in value represent more than 50%

Internationalization of the vitivinicultural sector

Global proportion of exports to consumption



- **Progressive increase of the "international wine sector"**: wine is more and more consumed out of its producing country

OIV Focus 2017:

Vine varieties distribution in the world

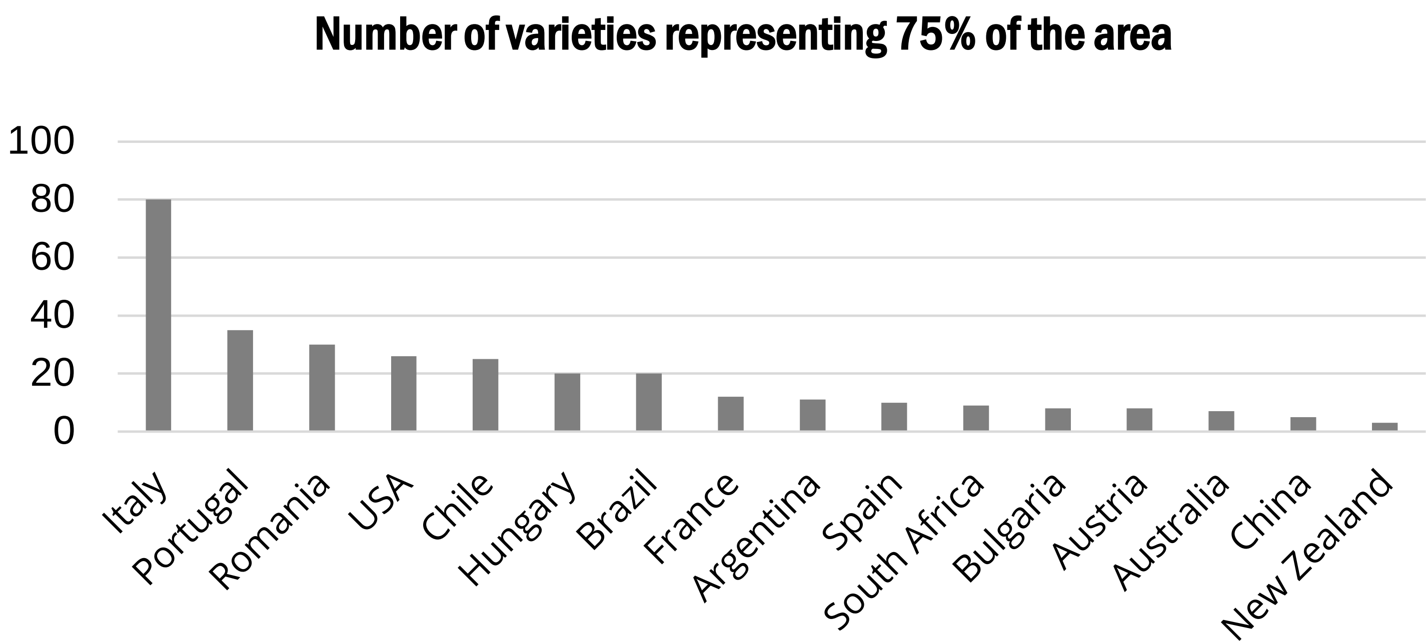
Main varieties distribution in the world

2015

Variety	Surface *(ha)*	Destination
Kyoho[2]	365 000	Table
Cabernet-Sauvignon	340 000	Wine
Sultanina	300 000	Table, dried and wine
Merlot	266 000	Wine
Tempranillo	231 000	Wine
Airen	218 000	Wine and Brandy
Chardonnay	211 000	Wine
Syrah	190 000	Wine
Grenache Noir (Granacha tinta)	163 000	Wine
Red Globe	160 000	Table
Sauvignon Blanc	121 000	Wine
Pinot Noir / Blauer burgunder	115 000	Wine
Trebbiano Toscano / Ugni blanc	111 000	Wine and Brandy

Out of the 10 000 vine varieties known in the wolrd, 13 varieties represents more than one third of the world vine area and 33 varieties represents 50%

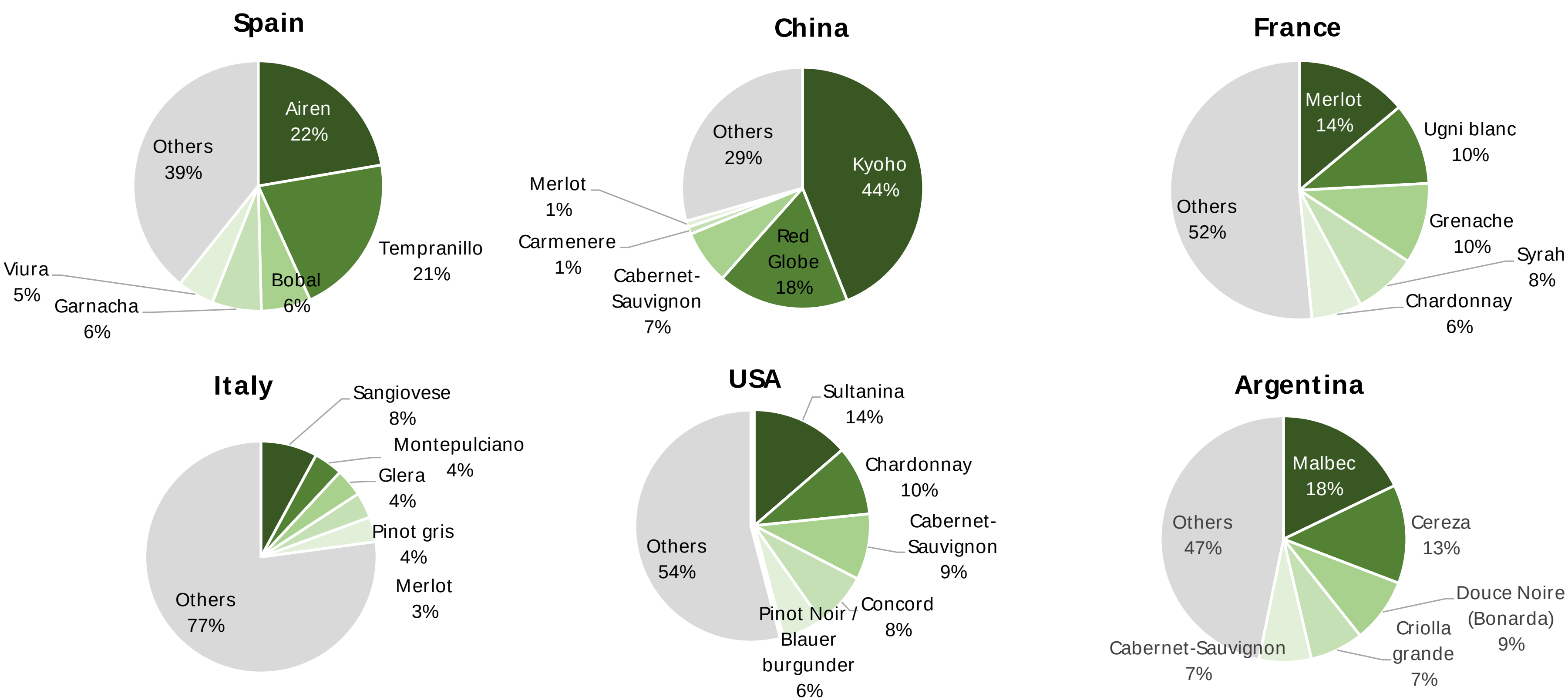
How diverse are countries?



Two big producing countries show an important number of varieties covering 75% of their area under vine : Italy and Portugal

Varietal distribution

5 main varieties in selected countries



Some countries have dominant varieties in their vineyard:

- In **Spain**, two main varieties (Airen and Tempranillo) cover more than 40% of the vines area
- In **China**, 44% of the vines are Kyoho variety
- **Italy** has a quite a diverse varietal distribution, with main varieties not exceding 8% of the area under vine

Where do the 10 main varieties grow?

Kyoho

Cabernet-Sauvignon

Sultanina

Merlot

Tempranillo

Where do the 10 main varieties grow?

Airen

Chardonnay

Syrah

Grenache noir (Garnacha tinta)

Red Globe

Thank you for your attention

Vielen Dank für Ihre Aufmerksamkeit

Grazie per la Loro attenzione

Gracias por su atención

Merci de votre attention