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

-4% since 2000

5 countries represent 50% of world vineyard

Spain 13%
China 11%
France 10%
Italy 9%
Turkey 6%

Rest of the world 50%

*Area under vines destined for the production of wine grapes, table grapes or dried grapes, in production or awaiting production.
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
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*
What happens to the 77 million tons of grapes grown in the world (2015)?

- Global grape production: 77.3 million tonnes
- Surface area: 7.5 million ha
- Yield: 10 tonnes/ha

Loss: 3.9 million tonnes

Global grape production available: 73.5 million tonnes

- Pressed grape: 39.6 million tonnes
  - Production of wine: 36.6 million tonnes (1.32 kg to make 1 litre of wine)
  - Production of musts & juices: 3.0 million tonnes (1.28 kg/l)

- Unpressed grape: 33.9 million tonnes
  - Production of table grapes: 27.7 million tonnes
  - Production of grape for dried grapes: 6.2 million tonnes (4kg of grapes makes 1kg of dried grapes, 1.5 million tonnes of dried fruit)

276 million hl
TABLE AND DRIED GRAPES

FAO-OIV FOCUS 2016

Non-alcoholic products of the vitivinicultural sector intended for human consumption
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%.
Table grapes consumption

27 million of tons in 2014
+ 73% since 2000

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.
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.
1.5 million tons in 2014
+10% since 2000

Turkey and USA dominate global dried grapes production
Dried grapes consumption

1.6 million tons in 2014
+17% since 2000

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

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

- USA: 23.9 mhl
- France: 43.5 mhl
- Spain: 39.3 mhl
- Germany: 9.0 mhl
- Italy: 50.9 mhl
- China: 11.4 mhl
- Chile: 10.1 mhl
- Argentina: 9.4 mhl
- South Africa: 10.5 mhl
- Australia: 13.0 mhl
### Wine production excluding juice and musts

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</tr>
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</table>

**World total**: 258 290 270 276 267 -9 -3%
Wine Consumption
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

USA 13%
France 11%
Italy 9%
Germany 8%
China 7%

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
- **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

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* Apparent consumption calculated by "Production + Imports - Exports"
Wine consumption 2015

Total wine
million hl

- USA: 31.0
- France: 27.2
- Italy: 21.4
- Germany: 19.6
- China: 16.2
- UK: 12.7
- Argentina: 10.3
- Spain: 10.0
- Russia: 9.3
- Australia: 5.3
- Canada: 4.9
- Portugal: 4.8
- South Africa: 4.2
- Romania: 3.9
- Japan: 3.5
- Netherlands: 3.5
- Brazil: 3.3
- Belgium: 3.0
- Switzerland: 2.9
- Greece: 2.4
- Sweden: 2.4
- Austria: 2.4
- Hungary: 2.2
- Chile: 2.1

Per capita
litres per person*

- Portugal: 54.0
- France: 51.8
- Italy: 41.5
- Switzerland: 40.3
- Austria: 32.4
- Argentina: 31.6
- Belgium: 31.6
- Sweden: 29.6
- Germany: 27.8
- Australia: 27.0
- Hungary: 26.4
- Greece: 25.7
- Spain: 25.4
- Netherlands: 24.5
- Romania: 23.9
- UK: 23.9
- Canada: 16.2
- Chile: 14.7
- USA: 11.9
- Russia: 11.0
- South Africa: 11.0
- Japan: 7.8
- Brazil: 2.0
- China: 1.4

* UN database Population 15+ years
## Trend in consumption

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

average value by litre up by
3.0%
The composition of exports:

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

Millions of hectolitres in 2016

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)

Millions of hectolitres in 2016

The top 5 importers in value represent more than 50%
Internationalization of the vitivinicultural sector

Global proportion of exports to consumption

Exports/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

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<td>Sultanina</td>
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<td>Merlot</td>
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<td>231 000</td>
<td>Wine</td>
</tr>
<tr>
<td>Airen</td>
<td>218 000</td>
<td>Wine and Brandy</td>
</tr>
<tr>
<td>Chardonnay</td>
<td>211 000</td>
<td>Wine</td>
</tr>
<tr>
<td>Syrah</td>
<td>190 000</td>
<td>Wine</td>
</tr>
<tr>
<td>Grenache Noir (Granacha tinta)</td>
<td>163 000</td>
<td>Wine</td>
</tr>
<tr>
<td>Red Globe</td>
<td>160 000</td>
<td>Table</td>
</tr>
<tr>
<td>Sauvignon Blanc</td>
<td>121 000</td>
<td>Wine</td>
</tr>
<tr>
<td>Pinot Noir / Blauer burgunder</td>
<td>115 000</td>
<td>Wine</td>
</tr>
<tr>
<td>Trebbiano Toscano / Ugni blanc</td>
<td>111 000</td>
<td>Wine and Brandy</td>
</tr>
</tbody>
</table>

Out of the 10 000 vine varieties known in the world, 13 varieties represents more than one third of the world vine area and 33 varieties represents 50%
How diverse are countries?

Number of varieties representing 75% of the area

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