



# 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



**International Organisation of  
Vine and Wine**

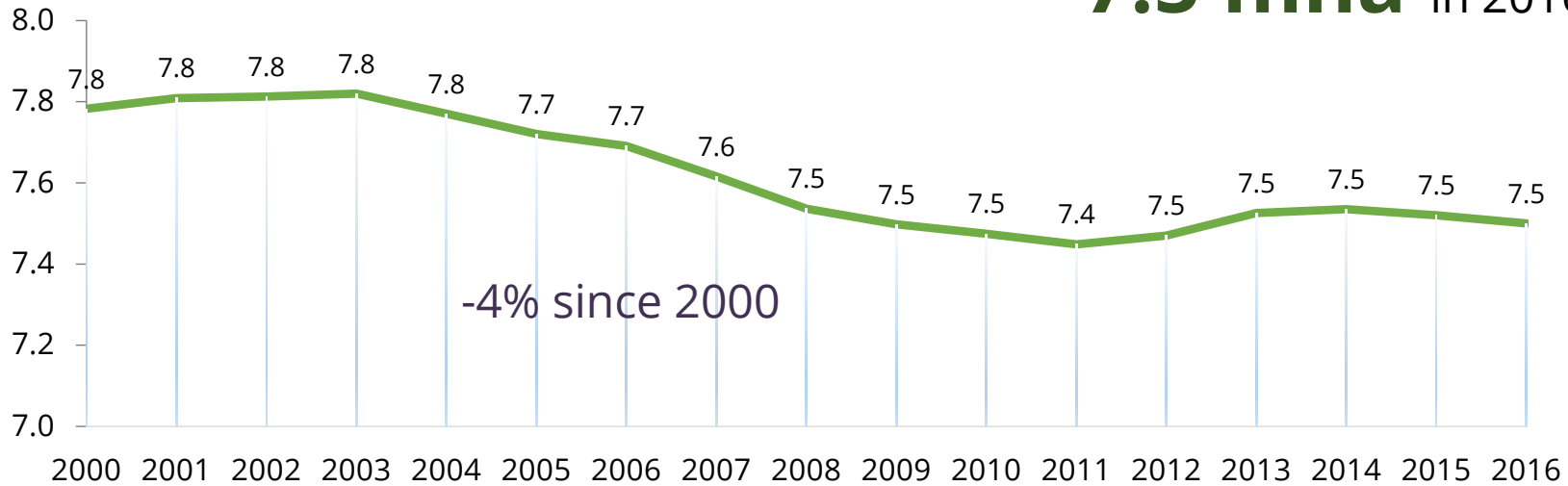
The background of the slide is an aerial photograph of a vast vineyard. The rows of grapevines are arranged in a precise, grid-like pattern that recedes into the distance, creating a strong sense of perspective. The vines are lush green, and the soil between the rows is a darker, brownish color. The overall scene is bright and clear, suggesting a sunny day.

# **Global area under vines**



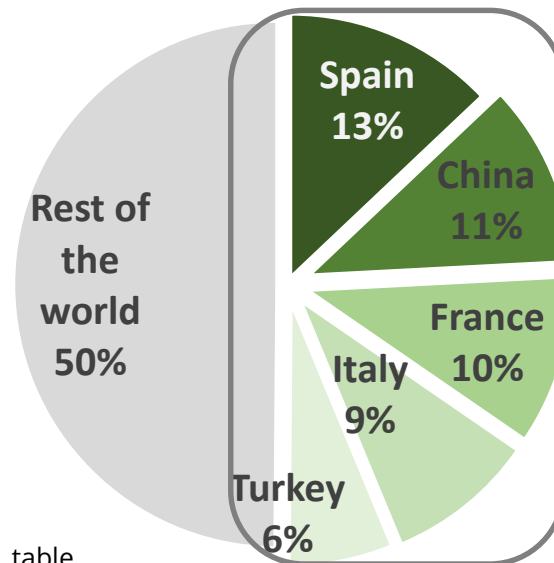
# Area under vines in the world\*

million of ha



**7.5 mha** in 2016

-4% since 2000



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

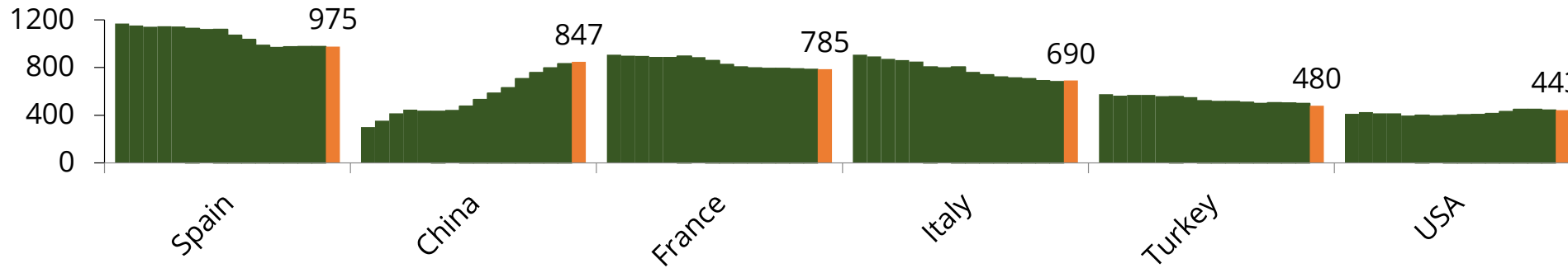
\*Area under vines destined for the production of wine grapes, table grapes or dried grapes, in production or awaiting production.



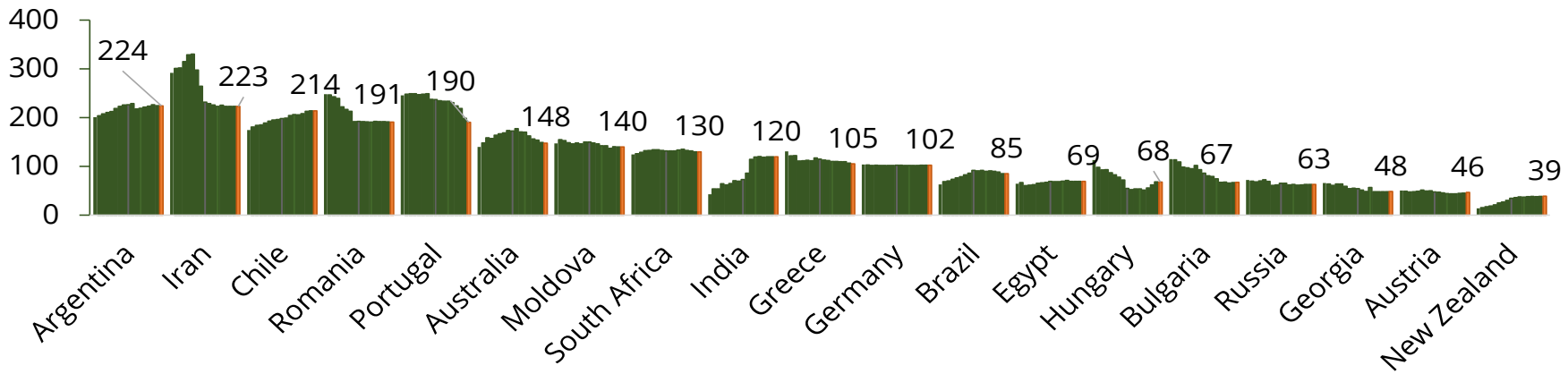
# Area under vines\*

thousand ha

Trends, 2000-2016



thousand ha



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.

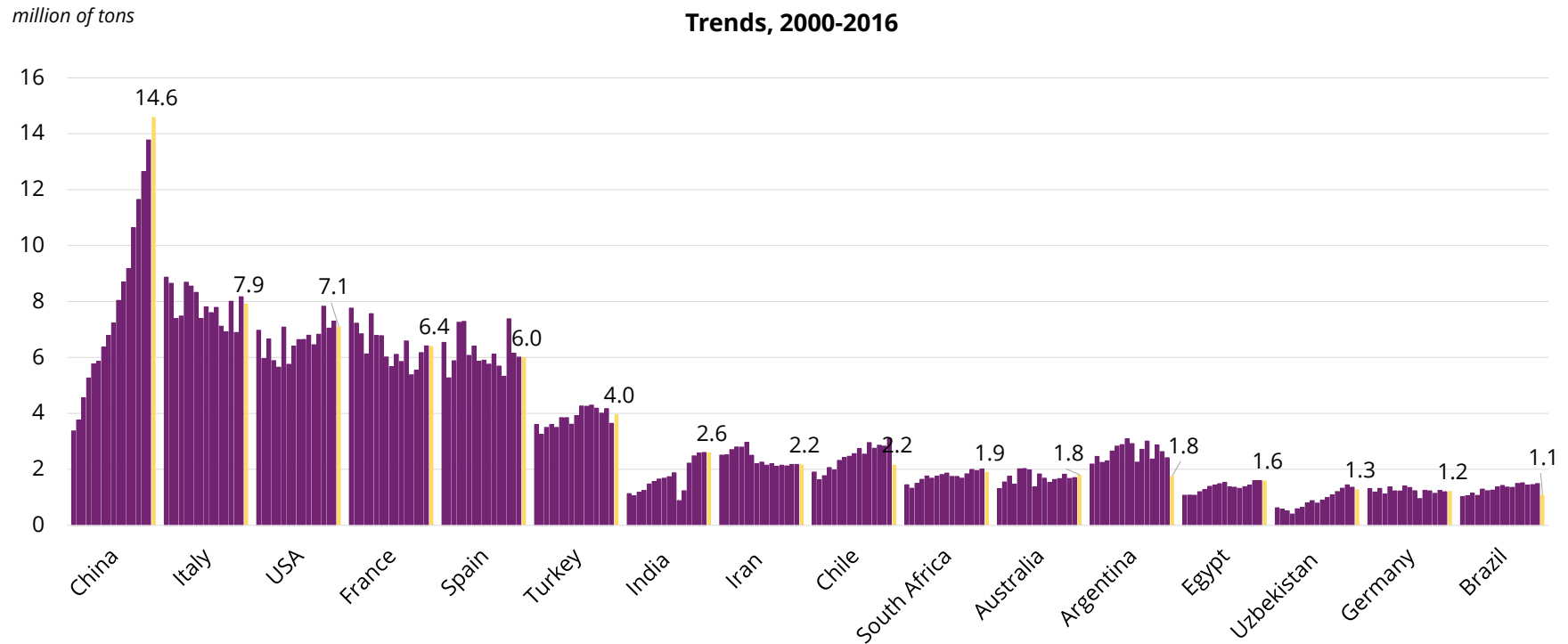


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# **Grape**



# Major grapes producers: all use

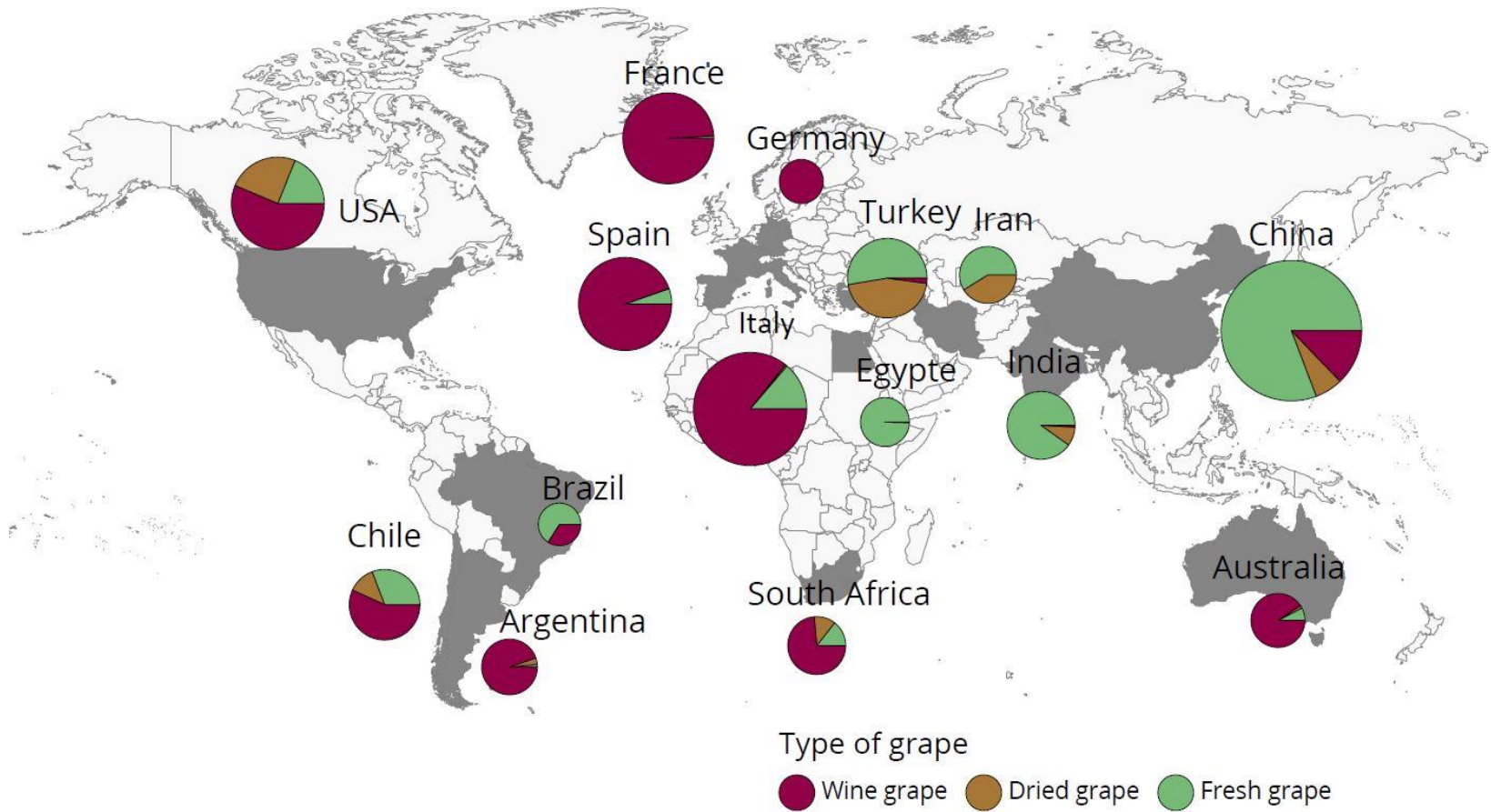


## Since 2000:

- **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\*





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

(2015)

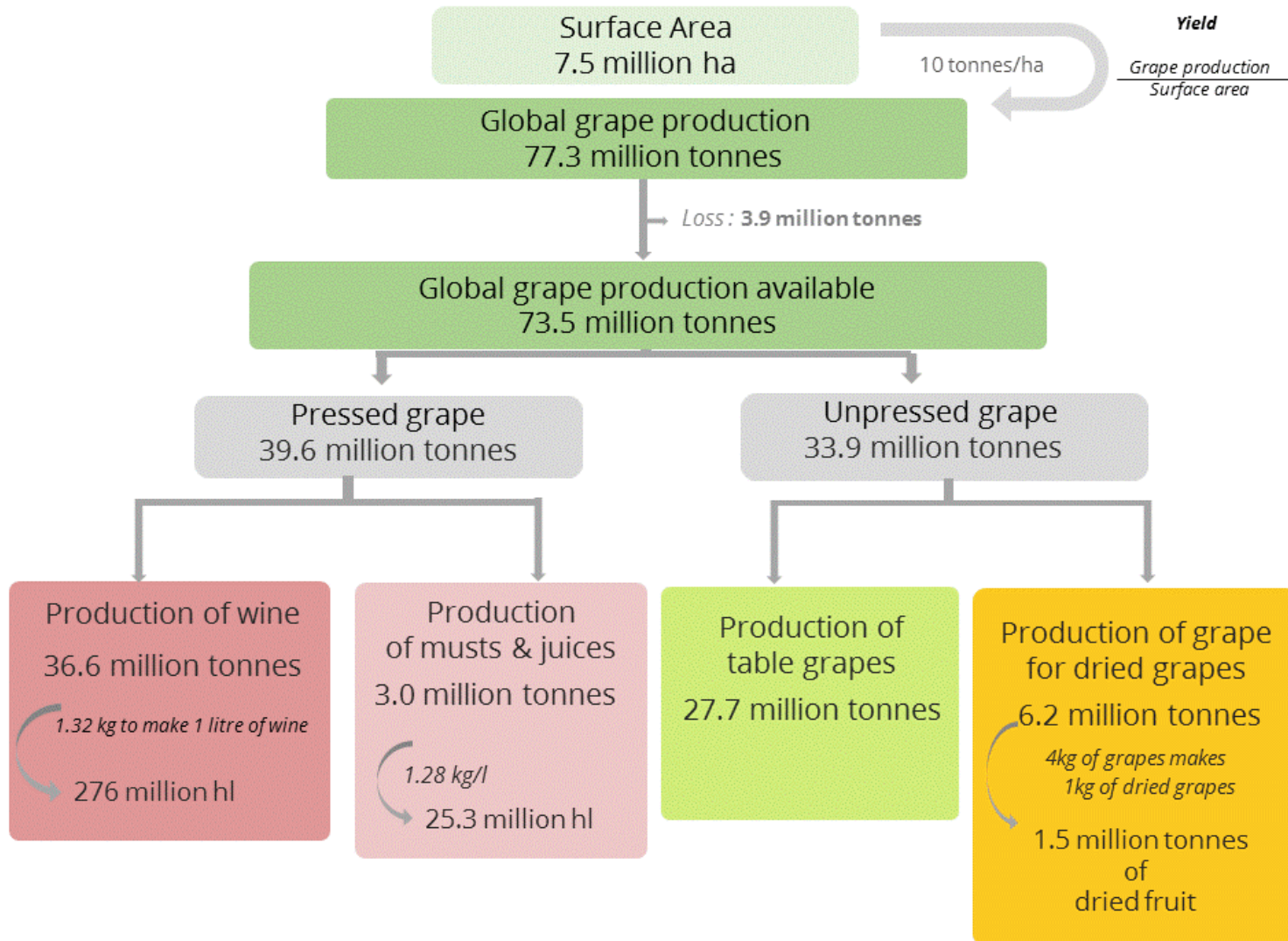






TABLE  
AND  
DRIED  
GRAPES

FAO-OIV FOCUS 2016



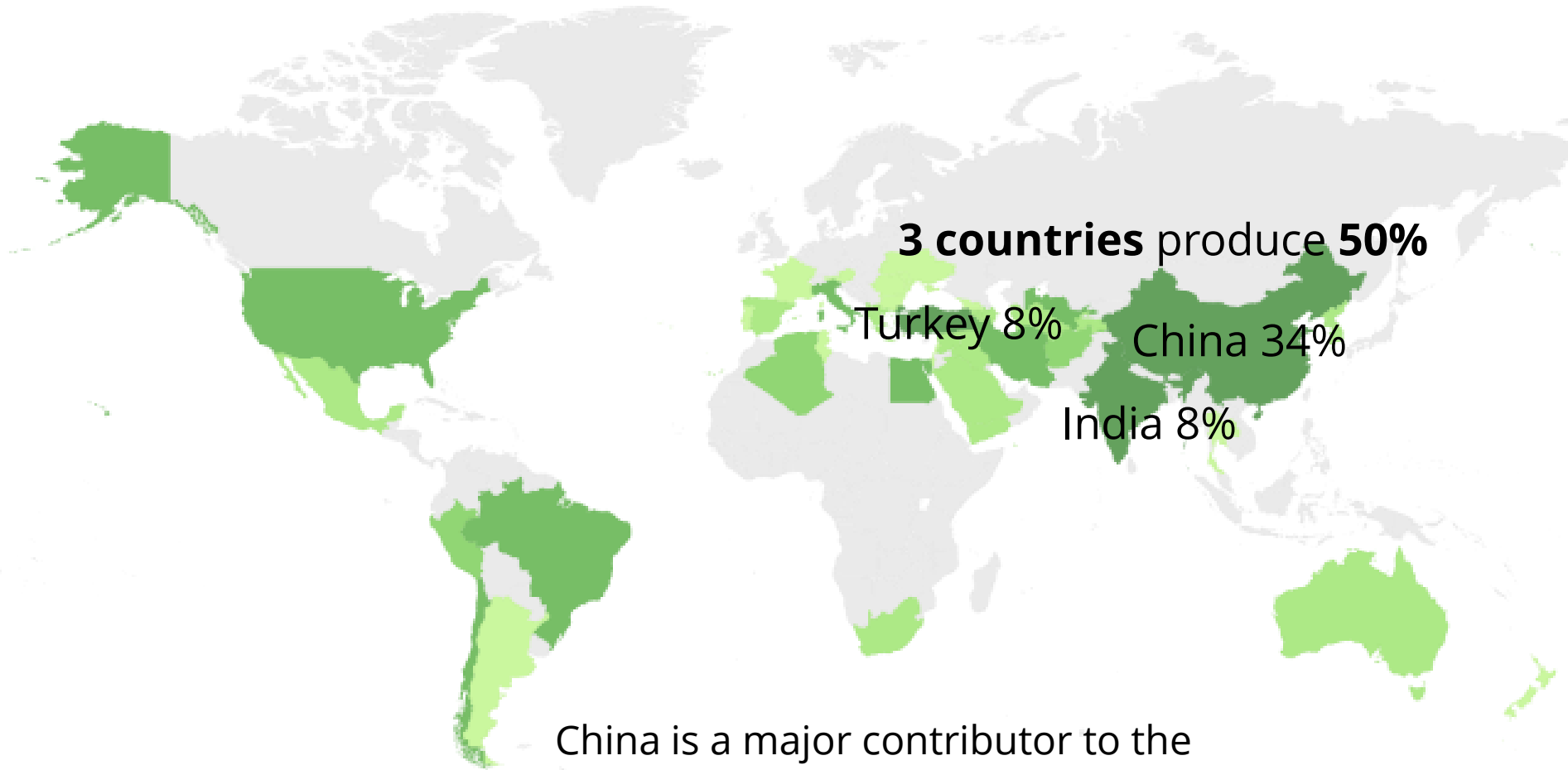
Non-alcoholic products of  
the vitivinicultural sector  
intended for human  
consumption



# Table grapes production

**27 million of tons** in 2014

+ 71% since 2000

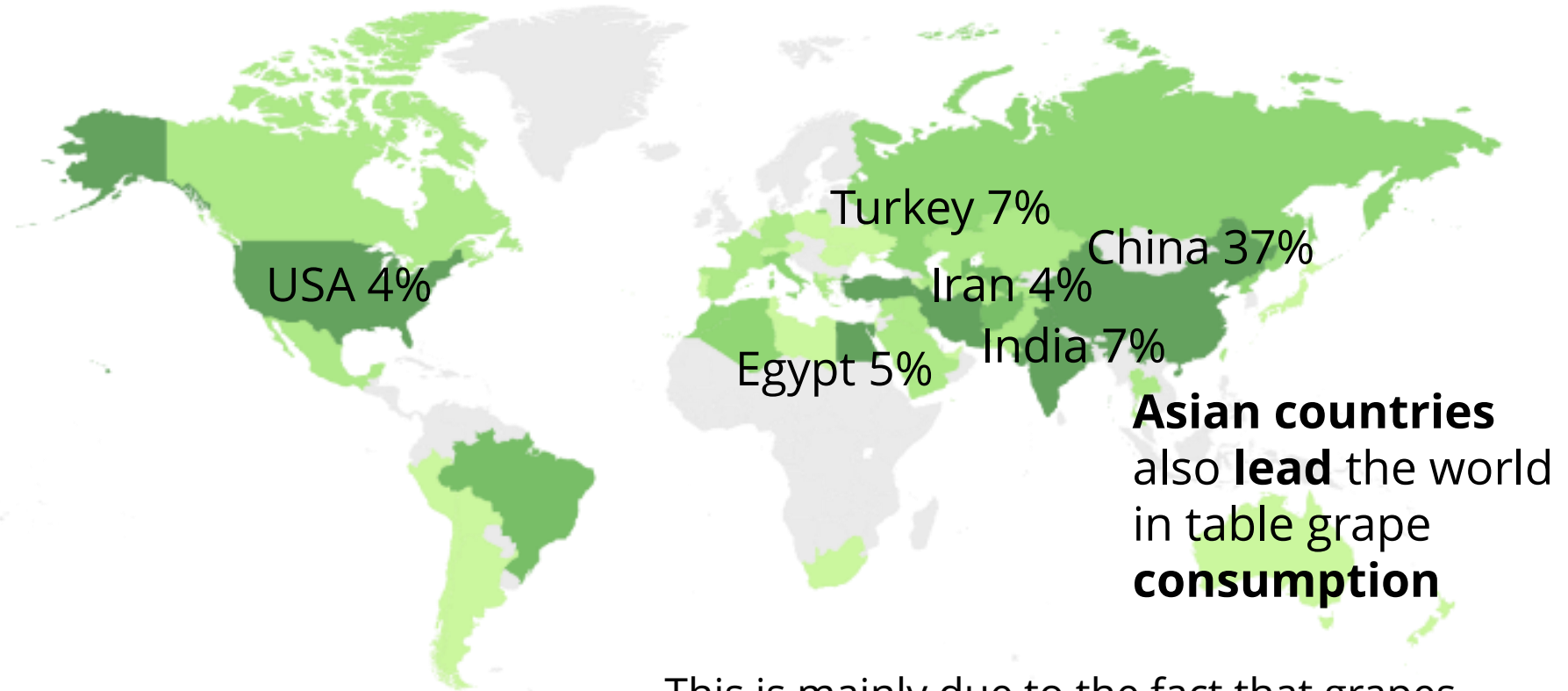


China is a major contributor to the growth of world production. Between 2000 and 2014, table grape production in China grew by more than 80%.

# Table grapes consumption

**27 million of tons** in 2014

+ 73% since 2000



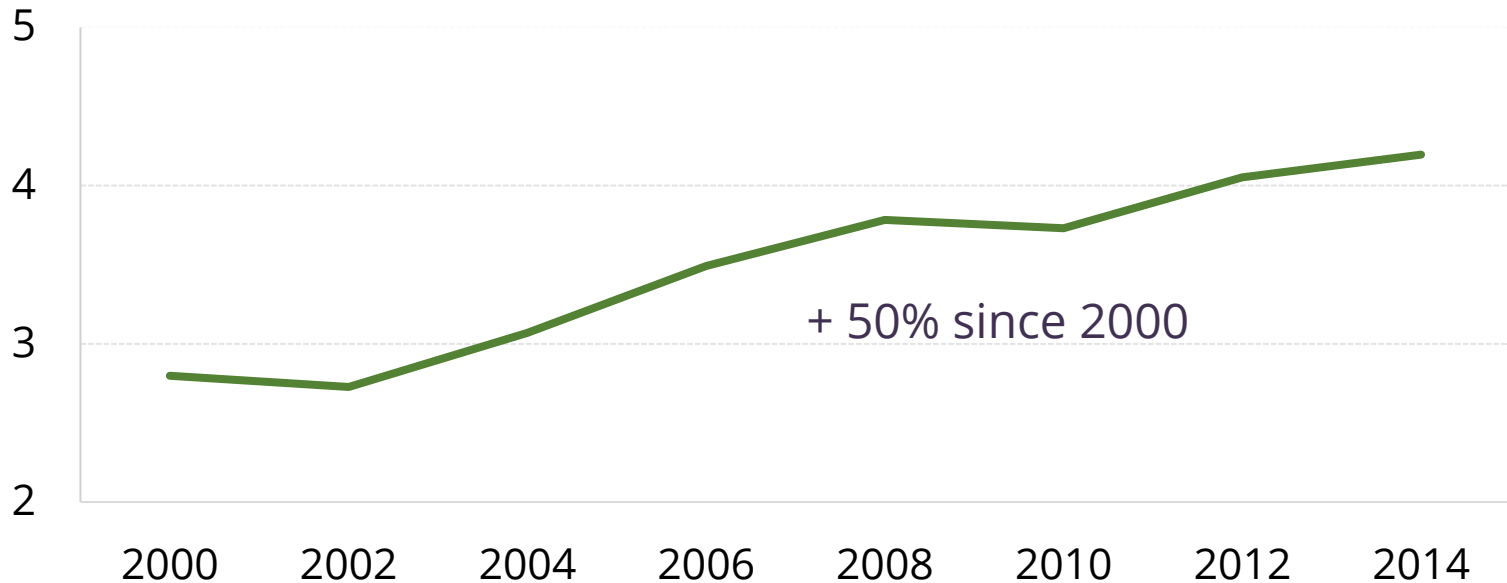
**Asian countries**  
also **lead** the world  
in table grape  
**consumption**

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

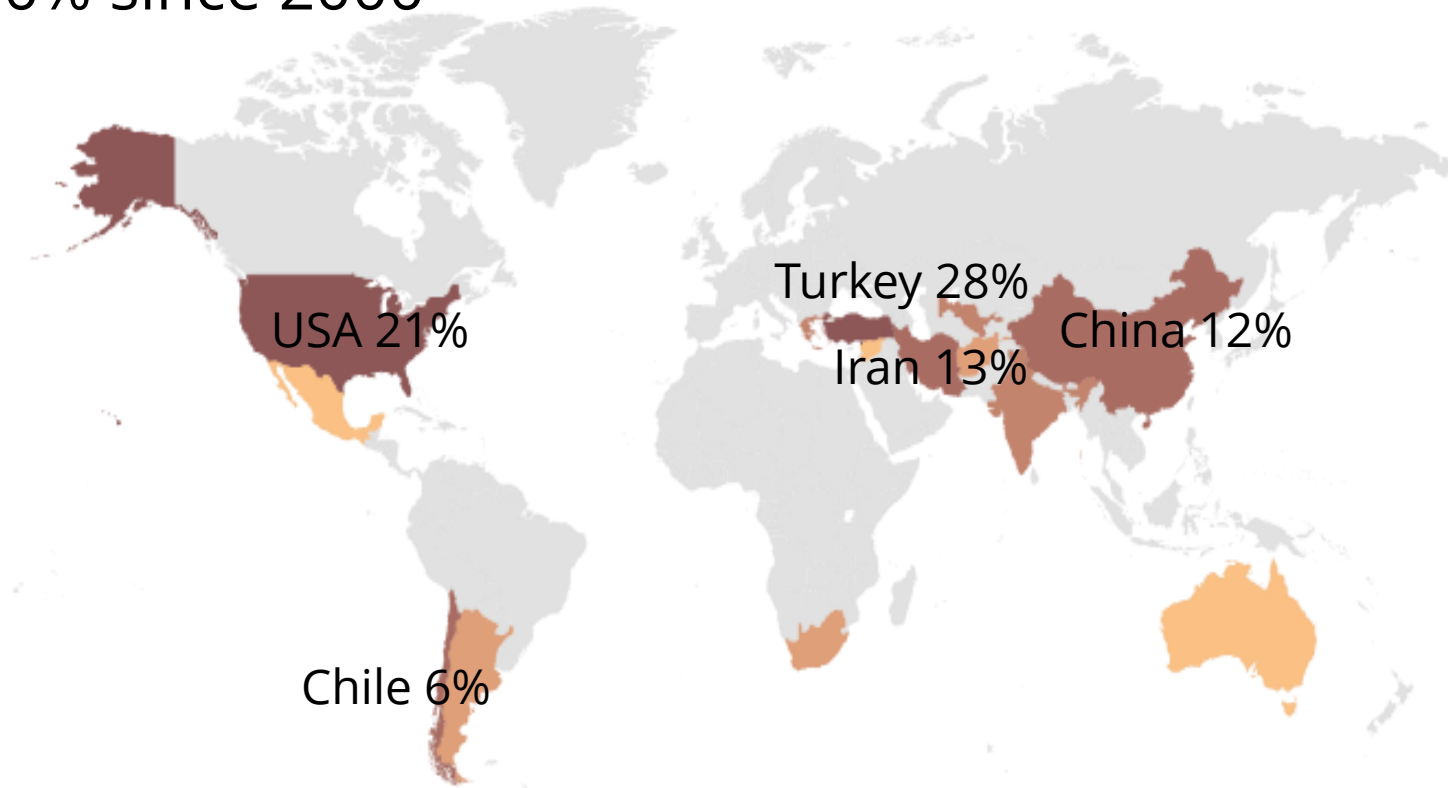
*million of tons*



- 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

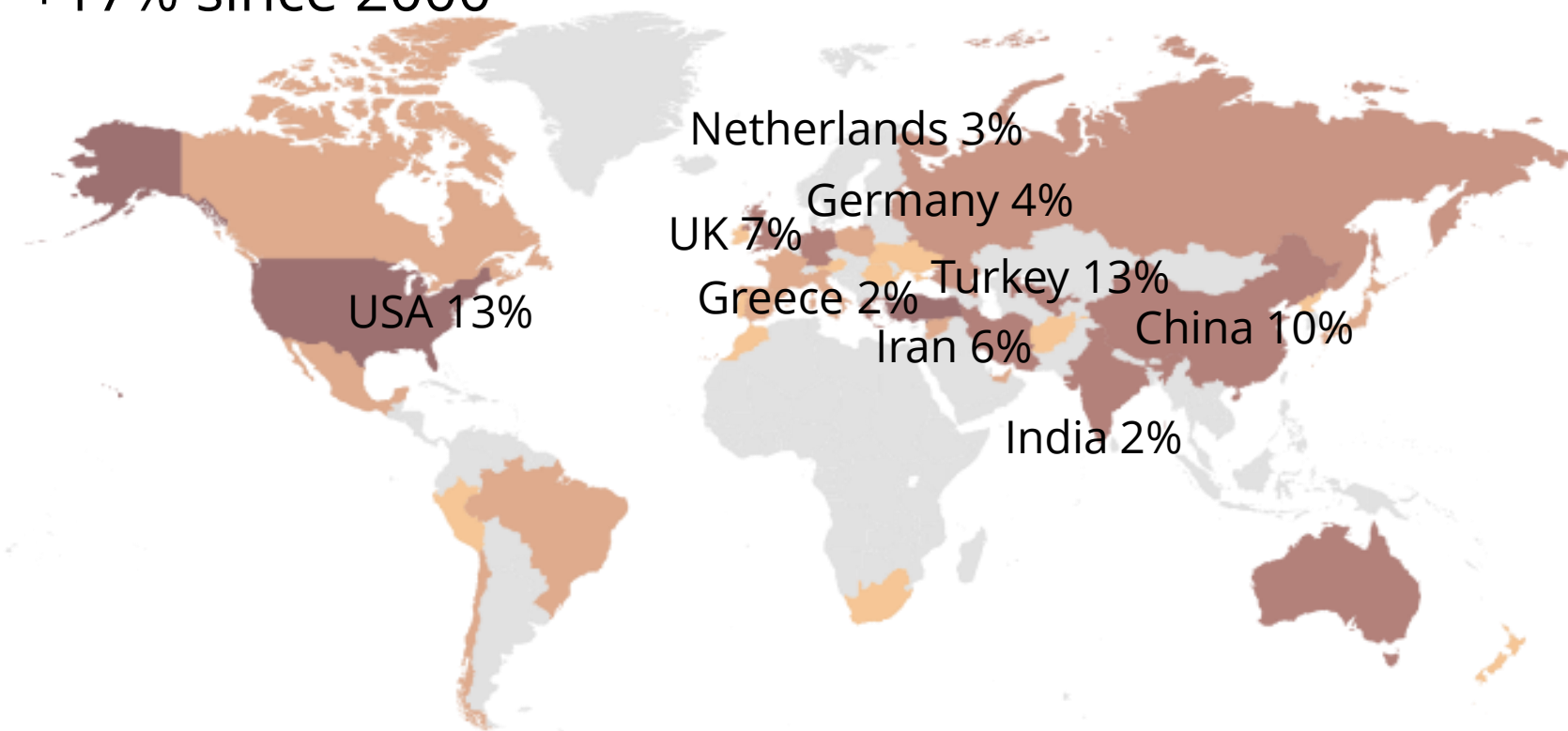


**Turkey** and **USA** dominate global dried grapes production

# Dried grapes consumption

**1.6 million tons** in 2014  
+17% since 2000

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

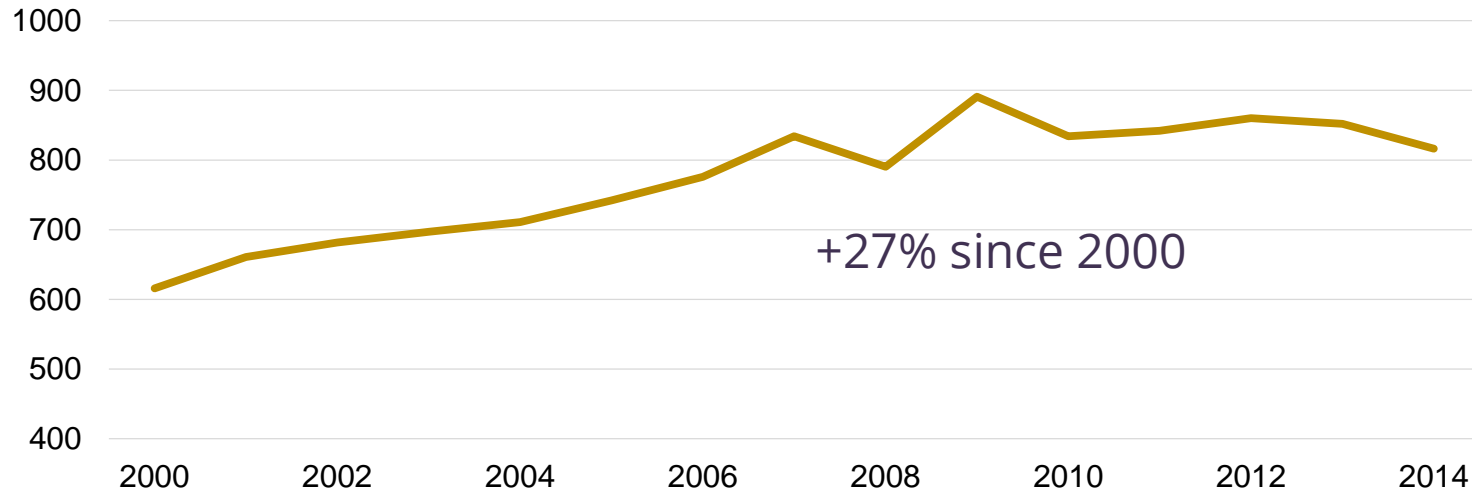


Although **Europe** is only a minor producer, it accounts for **33% of world consumption**

# Dried Grapes export

**More than 1 million of tons** in 2014

*thousand of tons*



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**



**International Organisation of  
Vine and Wine**

The background of the slide is a composite image. The top portion shows a vast, green vineyard with rows of grapevines stretching into the distance under a clear sky. The bottom portion shows a cellar filled with numerous wooden wine barrels, each with metal hoops, arranged in neat rows. The text 'Wine production' is overlaid in the center of the barrel section.

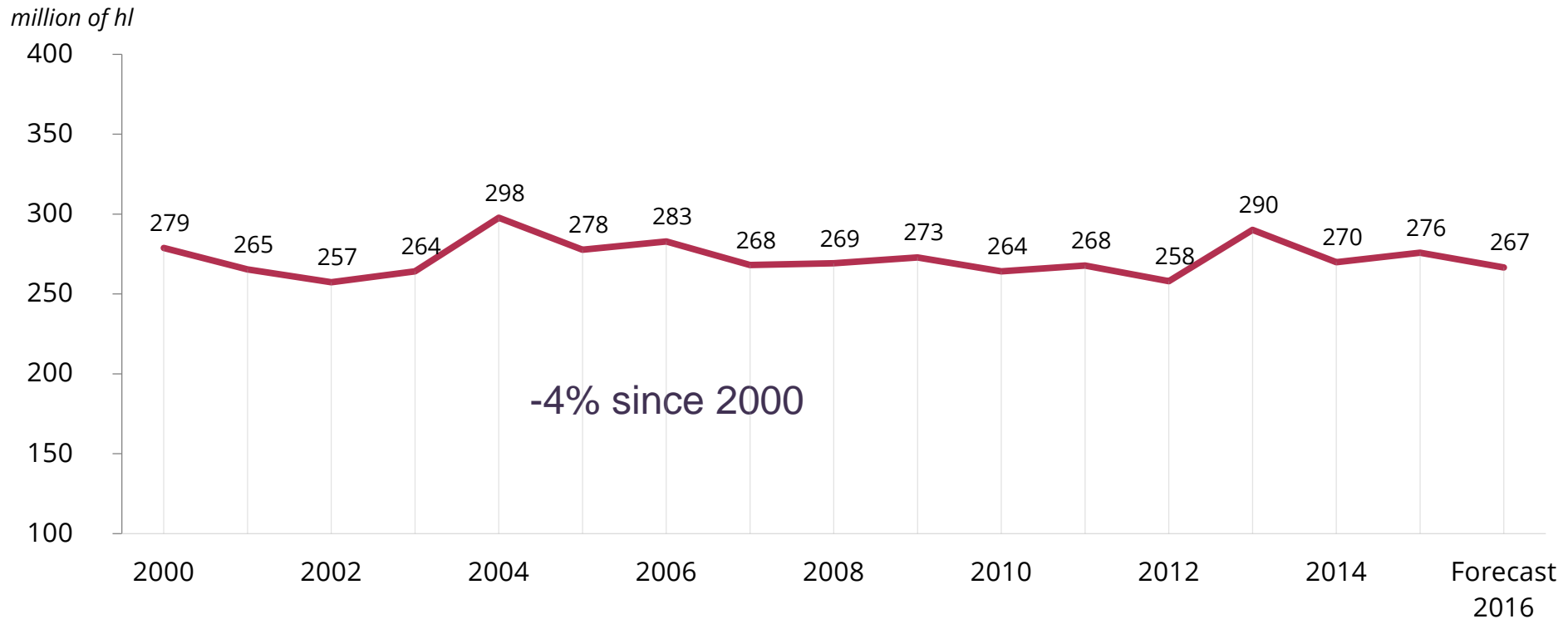
# **Wine production**





# World wine production

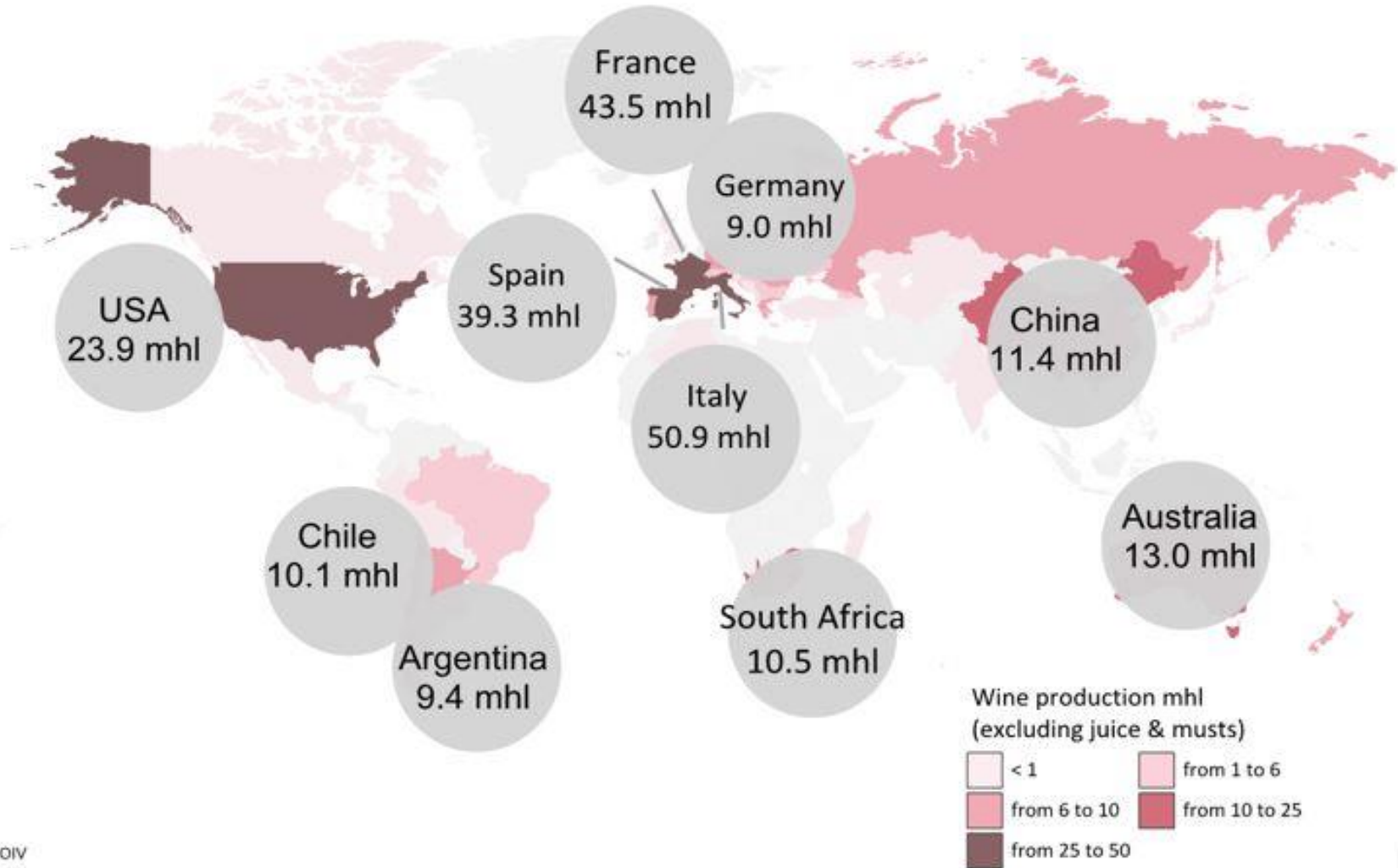
**267 mhl** in 2016



- **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*

<i>mhl</i>		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%
	<b>World total</b>	<b>258</b>	<b>290</b>	<b>270</b>	<b>276</b>	<b>267</b>	<b>-9</b>	<b>-3%</b>



**International Organisation of  
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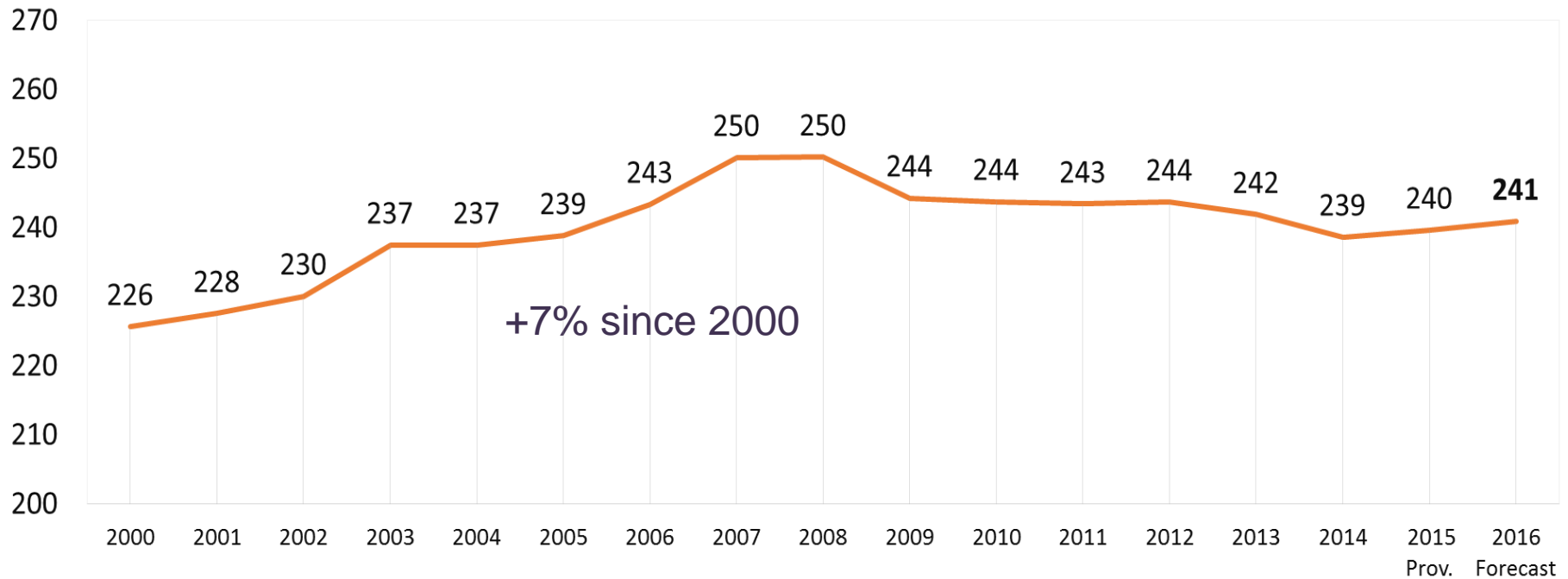
# **Wine Consumption**



# World wine consumption

## 241 mhl in 2016

mhl

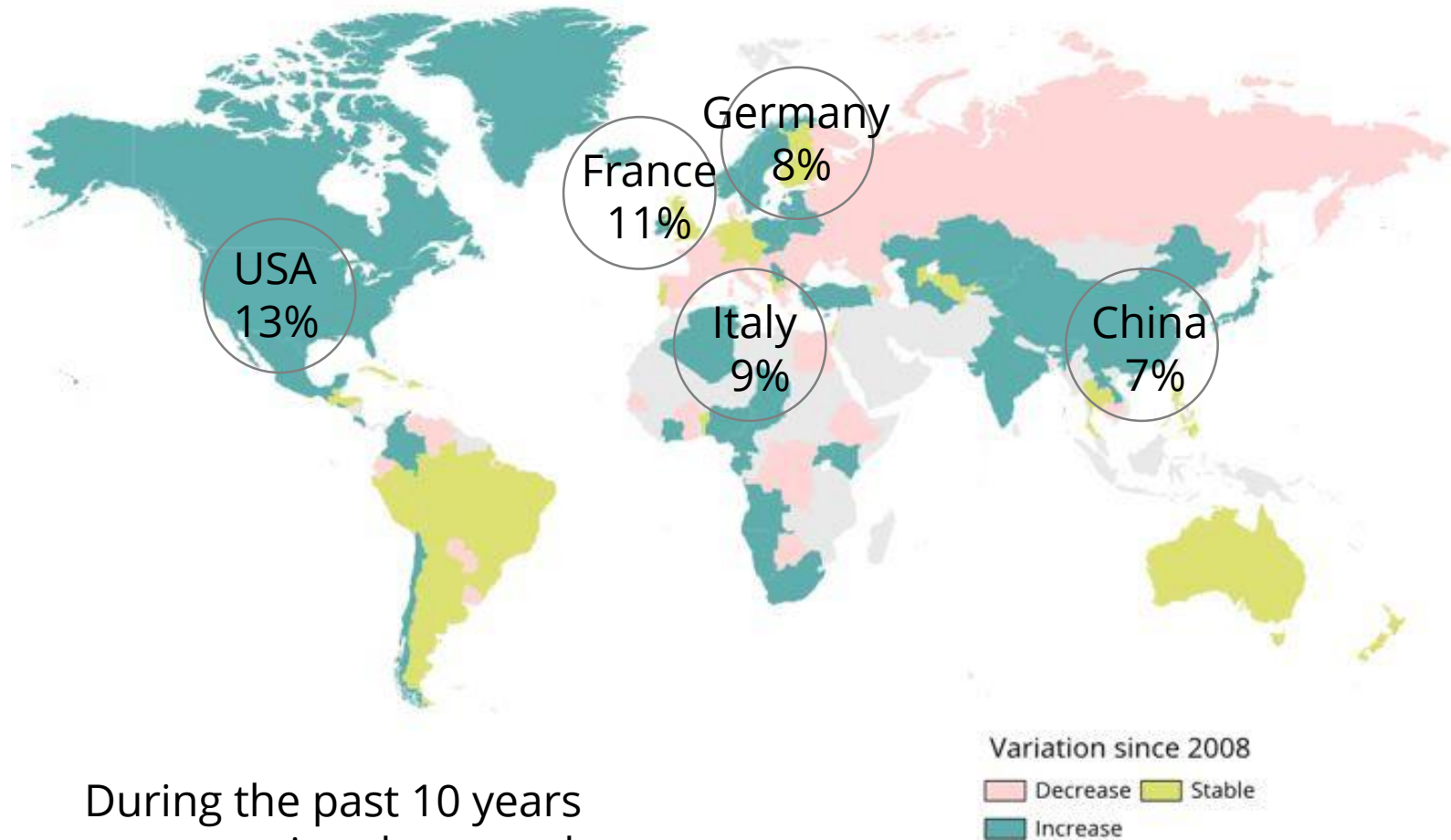


Since the beginning of the economic and financial crisis of 2008, global consumption seems to have stabilized: **wine consumption** stood at **241 mhl in 2016**



# Wine consumption in the world

5 countries consume almost half of the wine of the world



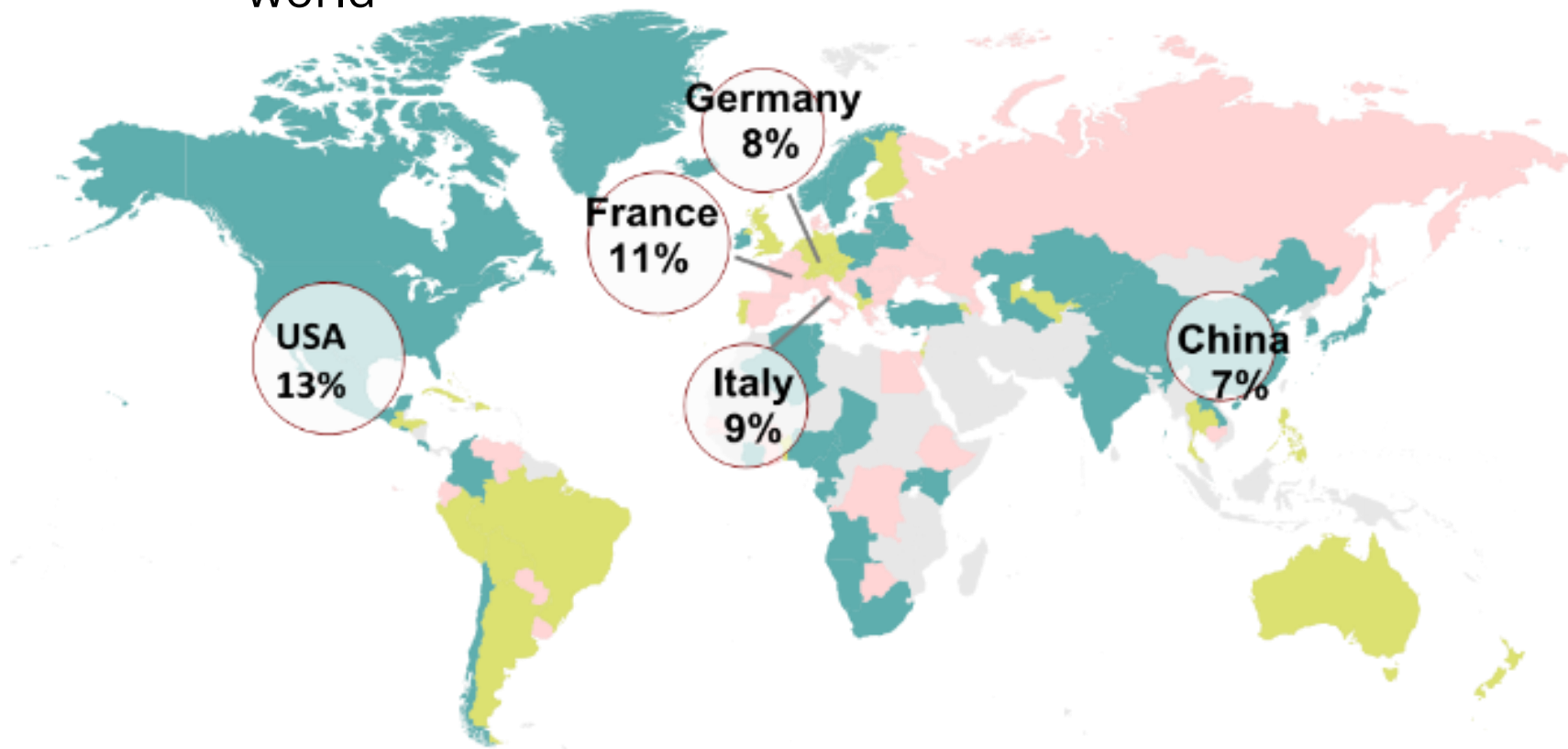
During the past 10 years consumption decreased especially in the traditional wine countries



# Wine consumption in the world

International Organisation of  
Vine and Wine

5 countries consume half of the wine of the world



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

Variation since 2008

- Decrease
- Stable
- Increase



# 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

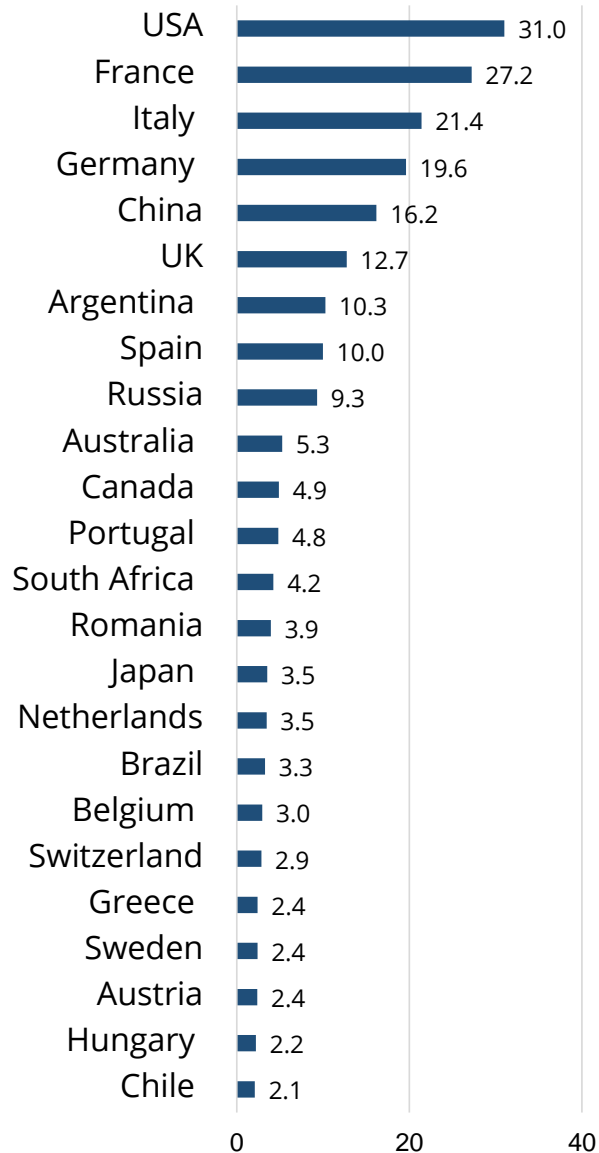
	<i>mhl</i>	2012	2013	2014	2015	Forecast 2016	2016/2015 Variation in volume	2016/2015 Variation in %
1	USA	30.0	30.2	30.4	31.0	31.8	0.8	2.5%
2	France	28.0	27.8	27.5	27.2	27.0	-0.2	-0.7%
3	Italy	21.6	20.8	19.5	21.4	22.5	1.1	5.3%
4	Germany	20.3	20.4	20.2	19.6	19.5	-0.1	-0.5%
5	China*	17.1	16.5	15.5	16.2	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%
	<b>World total</b>	<b>244</b>	<b>242</b>	<b>239</b>	<b>240</b>	<b>241</b>	<b>1.0</b>	<b>0.4%</b>

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

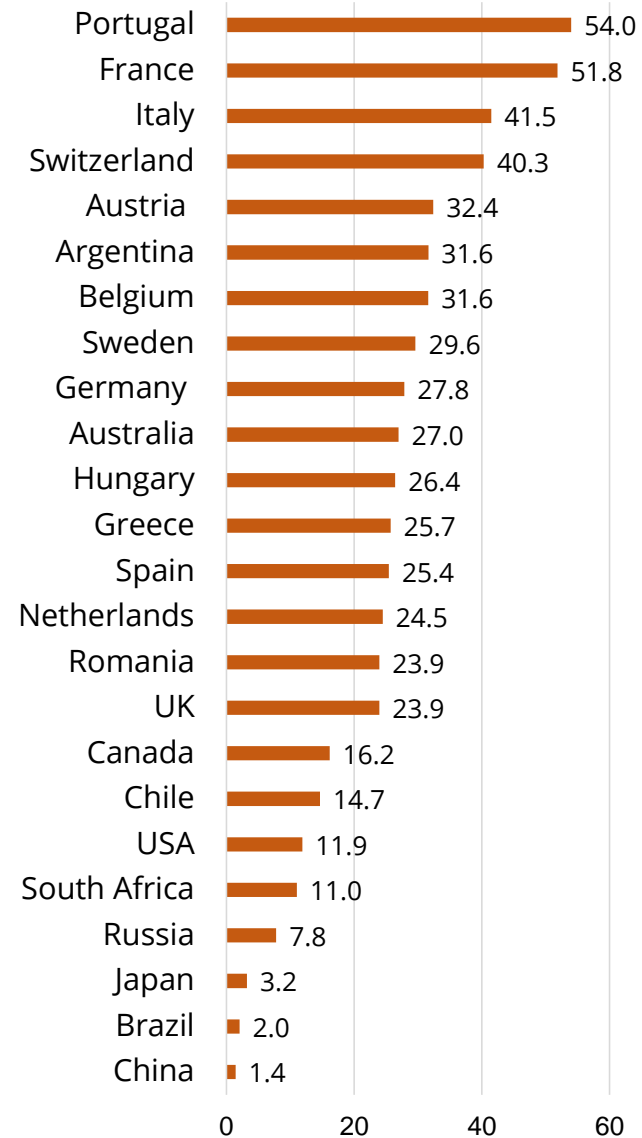


# Wine consumption 2015

**Total wine**  
*million hl*



**Per capita**  
*litres per person\**



\* UN database Population 15+ years



# Trend in consumption

<b>Traditional markets</b>	<b>Mature markets</b>	<b>Increasing markets</b>	<b>Emerging markets</b>
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 Mexico Japan South Korea Etc.	Mexico Nigeria Namibia India Peru Etc.



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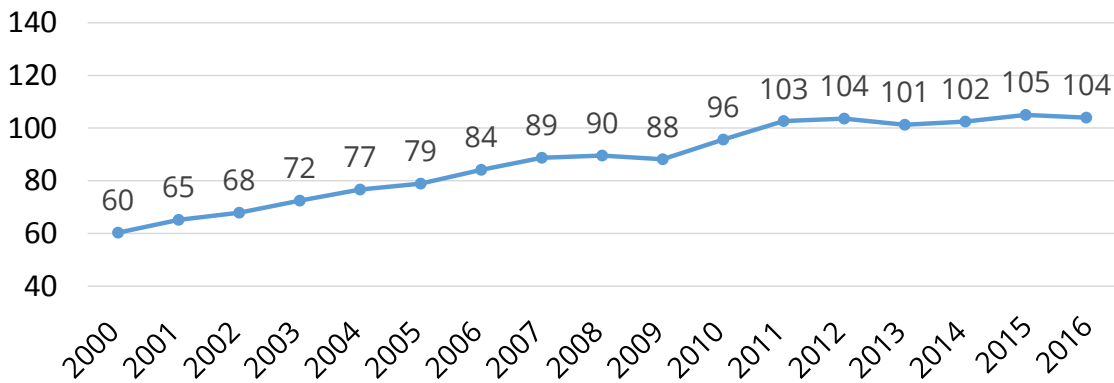
A large, light gray silhouette of a world map is centered on the page, serving as a background for the main title. The map shows the outlines of all major continents.

# **Wine trade**



# Less wine traded, though more expensive

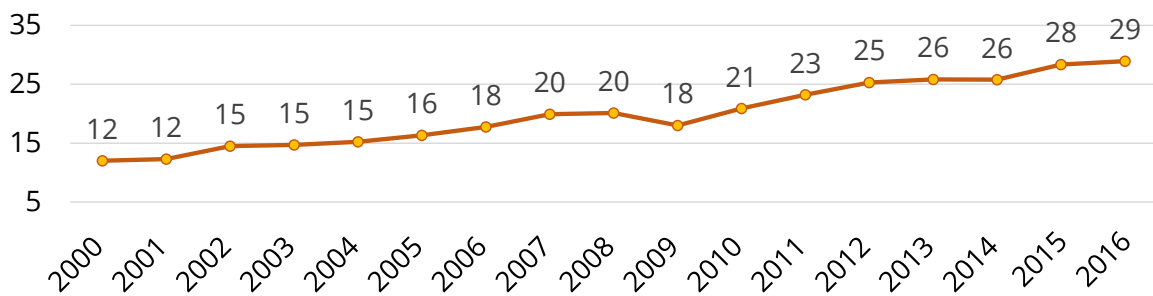
### Million of hl



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

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

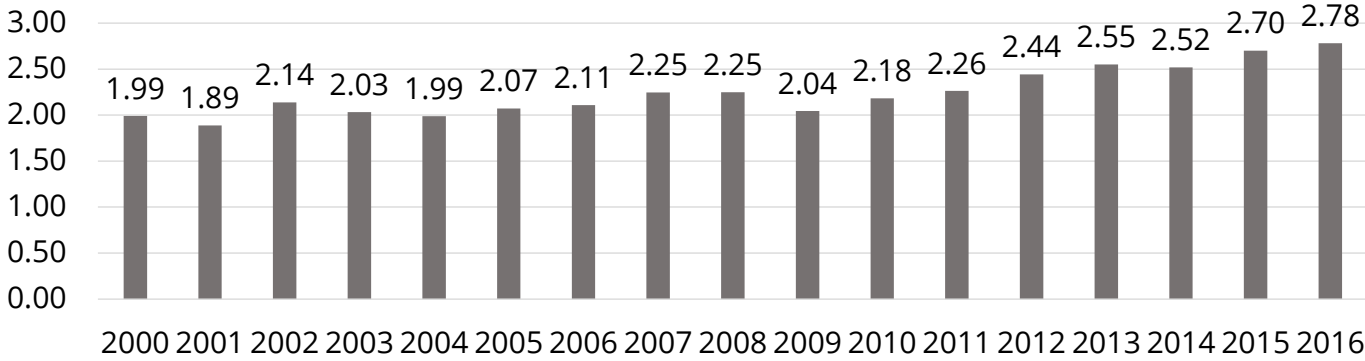
### Billion EUR



**increased by 2.0 % in value**

**(29 Billion EUR)**

### EUR/Litre



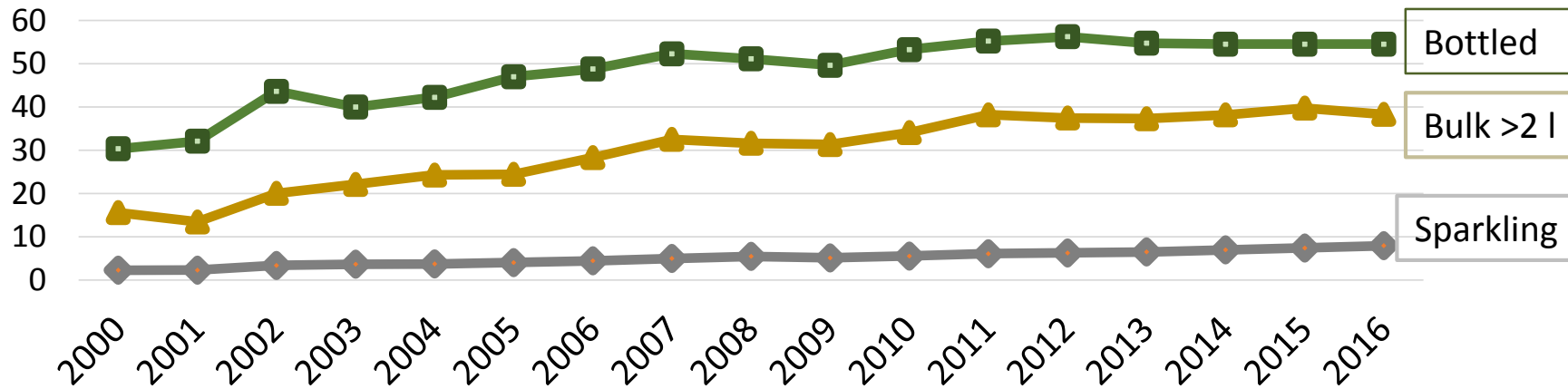
**average value by litre up by 3.0%**



# By type of product

## Evolution of the exports by type of product in volume

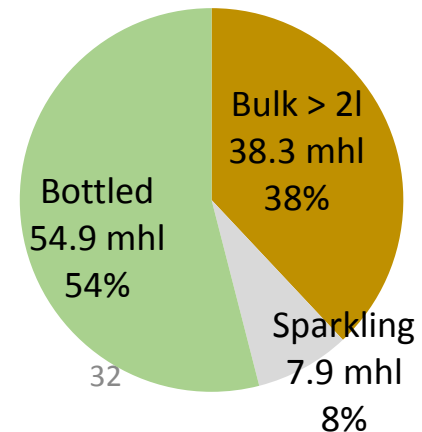
million hl



### 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)

### 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 than 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

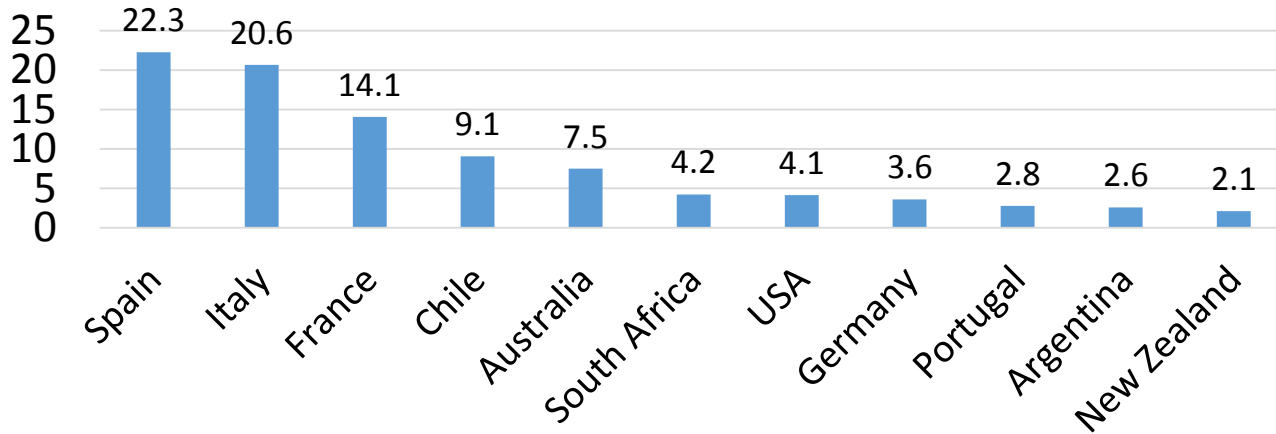
2204.30 - Other grape must

**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)



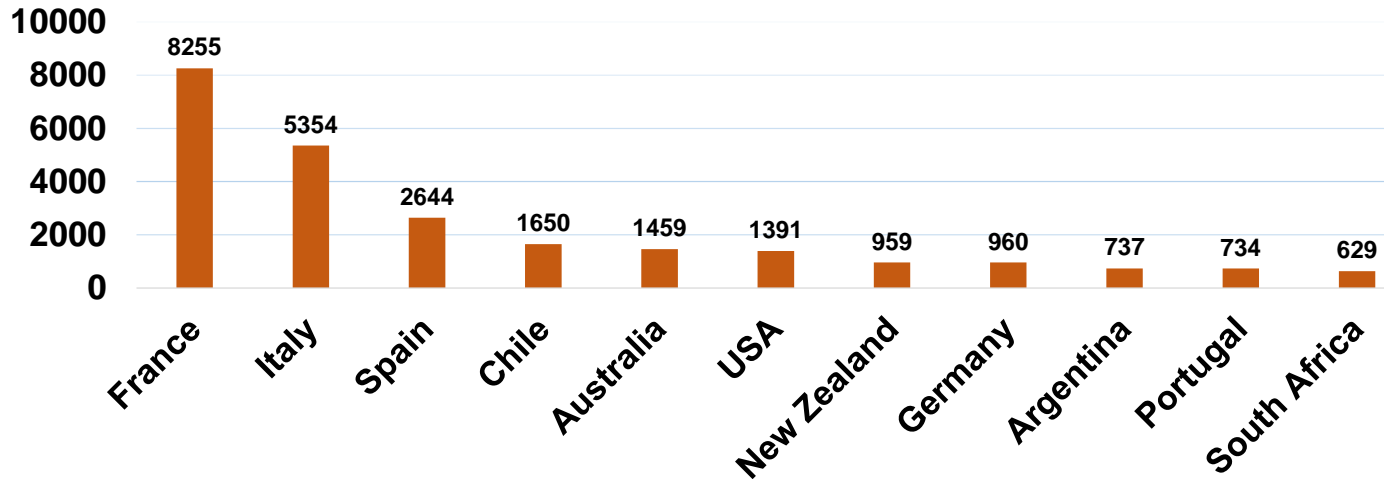
# Top world exporters

Millions of hectolitres in 2016



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

Million of Euros in 2016



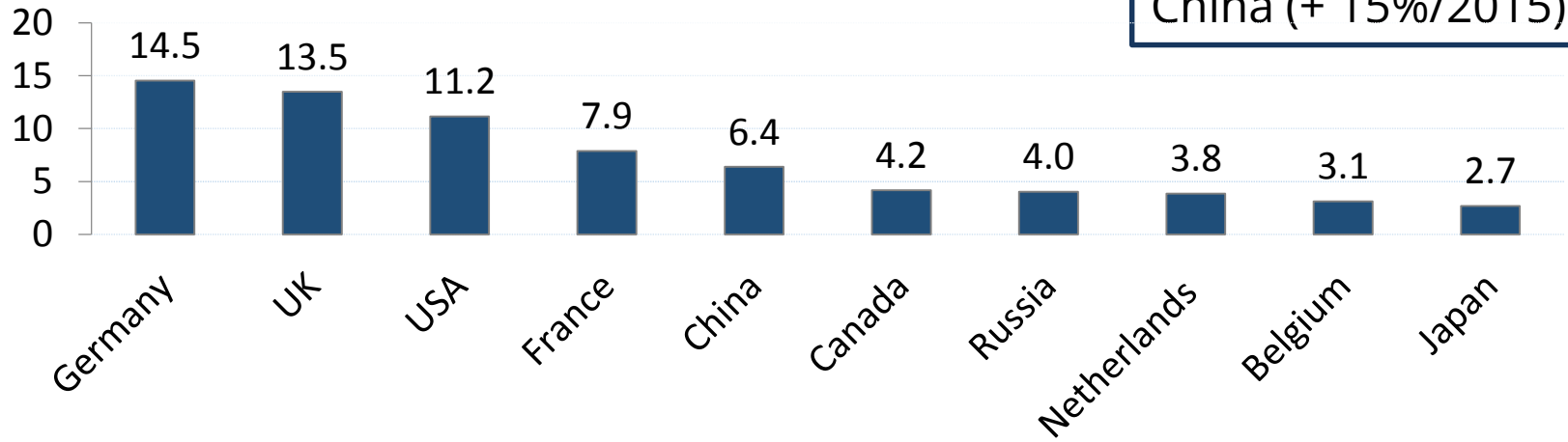
In value, France and Italy continue to dominate the market with respectively 28 % and 19 %



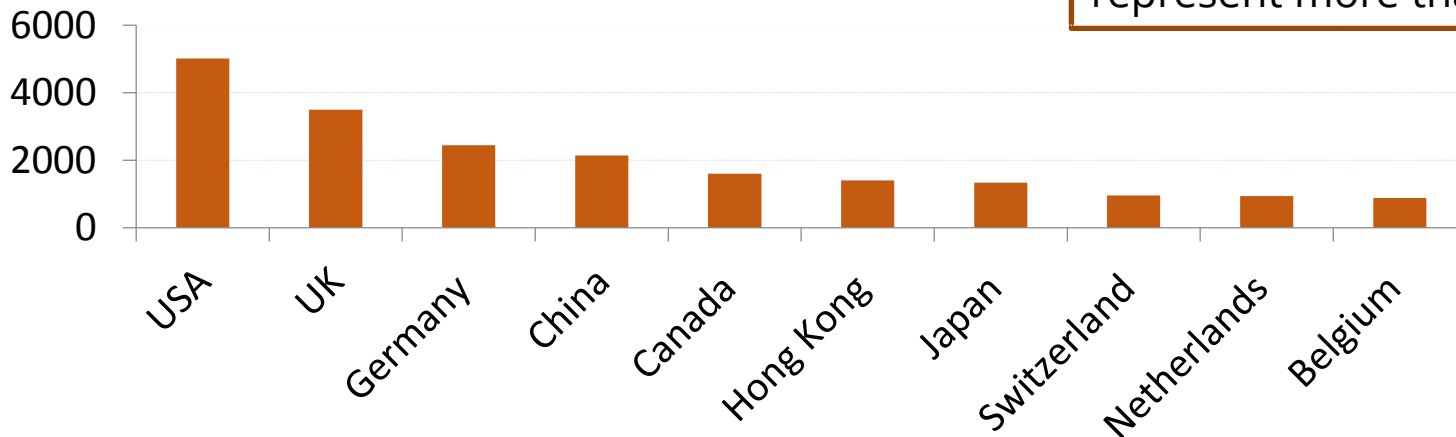


# Top world Importers

Millions of hectolitres in 2016



Million of Euros in 2016

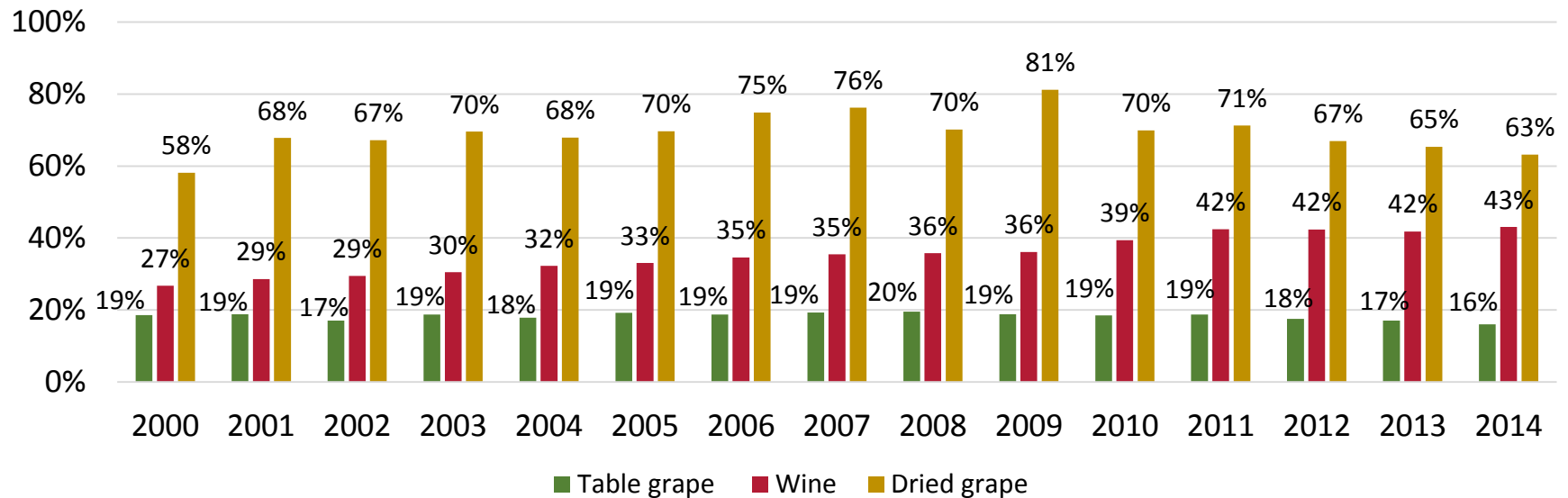




# Internationalization of the vitivinicultural sector

## 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

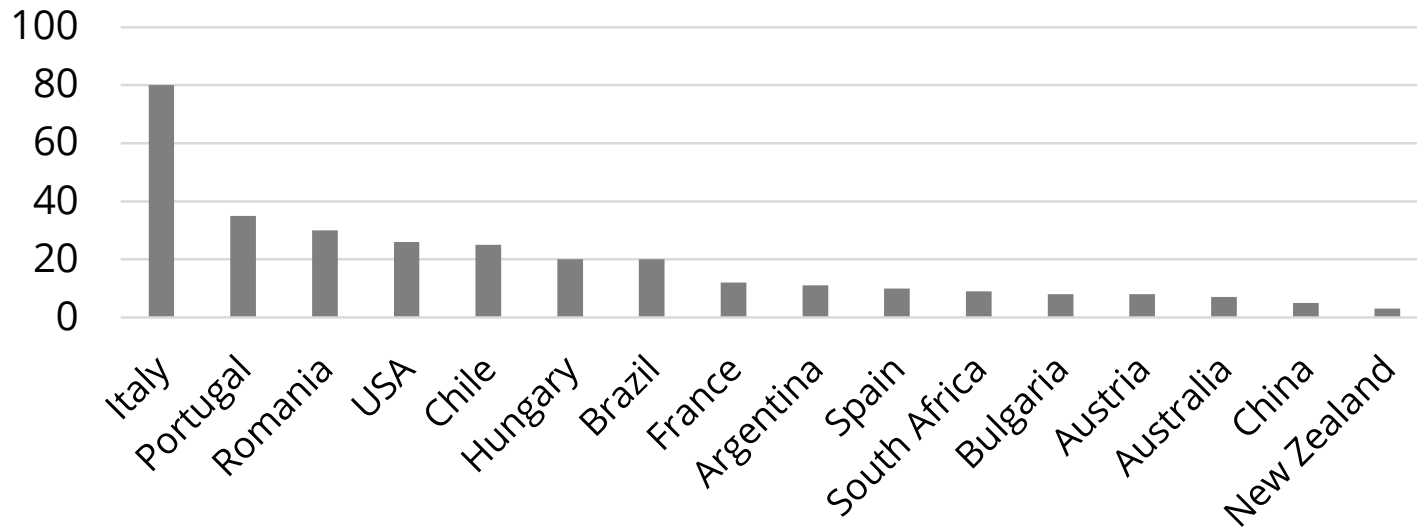
Variety	Surface (ha)	Destination
Kyoho <sup>2</sup>	365 000	Table
Cabernet-Sauvignon	340 000	Wine
Sultanina	300 000	Table, dried and wine
Merlot	266 000	Wine
Tempranillo	231 000	Wine
Airen	218 000	Wine and Brandy
Chardonnay	211 000	Wine
Syrah	190 000	Wine
Grenache Noir (Granacha tinta)	163 000	Wine
Red 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 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

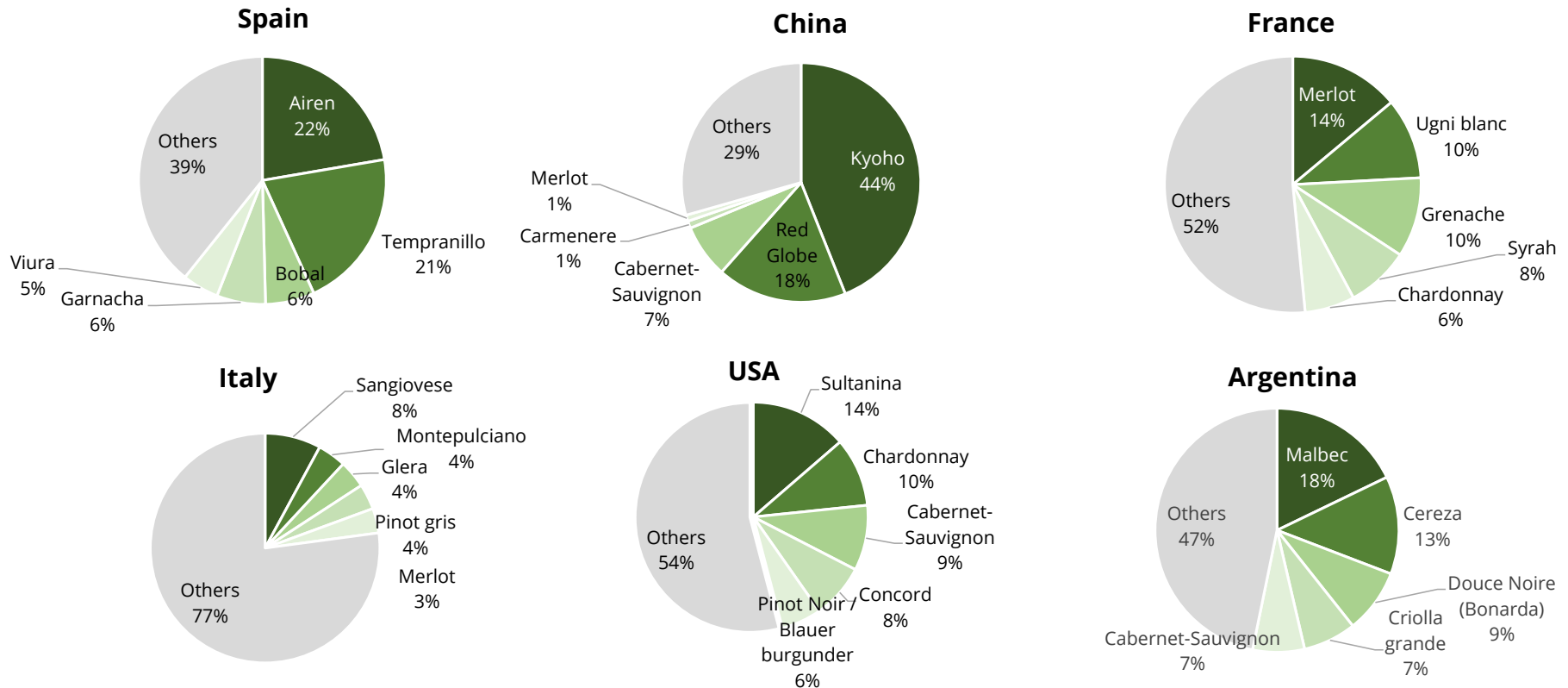


Two big producing countries show an important number of varieties covering 75% of their area under vine : Italy and Portugal



# 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 exceeding 8% of the area under vine



# Where do the 10 main varieties grow?

Kyoho



Cabernet-Sauvignon



Sultana



Merlot



Tempranillo









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Thank you for your attention

Vielen Dank für Ihre  
Aufmerksamkeit

Grazie per la Loro attenzione

Gracias por su atención

Merci de votre attention