Geneva, 15th of July 2019

STATE OF THE VITIVINICULTURE WORLD MARKET

PAU ROCA Director General of the OIV
TOPICS

SURFACE AREA UNDER VINES
TOTAL FRESH GRAPES
TABLE GRAPES
DRIED GRAPES
WINE
WHAT HAPPENS TO THE 77.8 MILLION TONNES OF GRAPES HARVESTED IN 2018?

- Surface Area: 7.4 million ha
- Global grapes production: 77.8 million tonnes
  - Loss: 3.6 million tonnes
  - Global grapes production available: 74.2 million tonnes

- Pressed grapes: 41.7 million tonnes
  - Production of wine: 38.5 million tonnes
    - 1.32 kg to make 1 litre of wine
    - 292 million hl
  - Production of musts & juices: 3.2 million tonnes
    - 1.28 kg/l
    - 25 million hl

- Unpressed grapes: 32.5 million tonnes
  - Production of table grapes: 27.3 million tonnes
  - Production of dried grapes: 5.2 million tonnes
    - 4 kg of grapes makes 1 kg of dried grapes
    - 1.3 million tonnes of dried fruit
VINEYARD SURFACE AREA
**WORLD AREA UNDER VINES**

*million ha*

<table>
<thead>
<tr>
<th>Year</th>
<th>Area (million ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>7.8</td>
</tr>
<tr>
<td>2001</td>
<td>7.7</td>
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<tr>
<td>2002</td>
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<tr>
<td>2011</td>
<td>7.2</td>
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<tr>
<td>2012</td>
<td>7.1</td>
</tr>
<tr>
<td>2013</td>
<td>7.1</td>
</tr>
<tr>
<td>2014</td>
<td>7.1</td>
</tr>
<tr>
<td>2015</td>
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<tr>
<td>2016</td>
<td>7.0</td>
</tr>
<tr>
<td>2017</td>
<td>7.0</td>
</tr>
<tr>
<td>2018</td>
<td>7.4</td>
</tr>
</tbody>
</table>

Decrease of the global area under vines since 2014, mainly driven by the decline of the vineyard area in Turkey, Iran and Portugal.

In 2018 the world vineyard increases its surface of 24000 ha (+0.3% / 2017)

*Vineyards destined for the production of all types of grapes, and including both bearing and non-bearing areas.*
AREA UNDER VINES IN 2018

5 COUNTRIES ACCOUNT FOR MORE THAN 50%:
ESP 969 000 HA
CHN 875 000 HA
FRA 793 000 HA
ITA 705 000 HA
TUR 448 000 HA
EVOlution area under vines:
2000-2018
GLOBAL GRAPES PRODUCTION

77.8 million tonnes in 2018

Share of total world grape production by type of product

Since 2000 there is an increase of the unpressed grape share, driven mainly by the rise in table grape production.
MAJOR GRAPES PRODUCERS (ALL USES)

TREND 2000-2018

**Million tonnes**

- China, mainland: 11.7
- Italy: 8.6
- USA: 6.9
- Spain: 6.9
- France: 6.2
- Turkey: 3.9
- India: 2.9
- Argentina: 2.7

**Million tonnes**

- Chile: 2.5
- Iran: 2.3
- Australia: 1.9
- South Africa: 1.8
- Uzbekistan: 1.7
- Egypt: 1.6
- Brazil: 1.6
- Germany: 1.4
- Romania: 1.3
MAJOR GRAPE PRODUCERS IN 2018

Type of grape
- Wine grape*
- Dried grape
- Table grape
* included musts & juices

OIV
TABLE GRAPES
WORLD TABLE GRAPES PRODUCTION

With an average annual growth rate of +5%, global production of table grapes has doubled in 20 years

27.3 million tonnes in 2018
MAJOR TABLE GRAPES PRODUCERS

TREND 2000-2018

China is a major contributor to the world production of table grapes (35% of the world total in 2018)

Between 2000 and 2018, table grapes production in China has multiplied by 7
DRIED GRAPES
2018 world dried grapes production (+9%/2017) is in line with its 10 years average

Asia and America continue to dominate the world production with a share of 92%
In 2018, the top 4 producers account for 73% of world production: Turkey (28%), USA (20%), China (14%) and Iran (11%).
WINE PRODUCTION
WORLD PRODUCTION OF WINE

(JUICES & MUSTS EXCLUDED)

With a 17% increase compared to 2017 (+43 million hl), wine production in 2018 is the 2nd highest since 2000

292 million hl in 2018
WORLD PRODUCTION IN 2018

Wine production mhl
(excluding juice & musts)

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< 1  from 1 to 6  from 6 to 10  from 10 to 25  from 25 to 50

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MAJOR WINE PRODUCERS
TREND 2000-2018

million hl

Italy 55
France 49
Spain 44
USA 24
Argentina 15
Chile 13
Australia 13
Germany 10
South Africa 9
China, mainland 9

million hl

Portugal 6
Russia 6
Romania 5
Hungary 4
Brazil 3
New Zealand 3
Austria 3
Greece 2
Ukraine 2
Moldova 2
Switzerland 1
Bulgaria 1
GLOBAL WINE CONSUMPTION

246 million hl in 2018

After the 2008 economic crisis, global wine consumption has been fluctuating between 241-246 million hl.

Since 2014 we observe a steady growth in consumption which seems to stabilize in 2018.
WHO IS DRIVING THE GROWTH IN CONSUMPTION?

Variation since 2014
- Pink: Decrease
- Yellow: Stable
- Blue: Increase
WINE CONSUMPTION
Total consumption 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Consumption (million hl)</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>33</td>
</tr>
<tr>
<td>France</td>
<td>27</td>
</tr>
<tr>
<td>Italy</td>
<td>22</td>
</tr>
<tr>
<td>Germany</td>
<td>20</td>
</tr>
<tr>
<td>China, mainland</td>
<td>18</td>
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<tr>
<td>UK</td>
<td>12</td>
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<tr>
<td>Russia</td>
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<tr>
<td>Argentina</td>
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<td>Australia</td>
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<td>Canada</td>
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<td>Romania</td>
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<tr>
<td>South Africa</td>
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<tr>
<td>Netherlands</td>
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<td>Japan</td>
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<td>Brazil</td>
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<td>Switzerland</td>
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<td>Hungary</td>
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</table>

Per capita (+15) consumption 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Consumption (litres per capita)</th>
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</thead>
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<tr>
<td>Portugal</td>
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<tr>
<td>France</td>
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<td>Italy</td>
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<td>Switzerland</td>
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<td>Belgium</td>
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<td>USA</td>
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<td>Brazil</td>
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<td>China, mainland</td>
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OIV FOCUS

INDUSTRIAL USE OF WINE
OIV FOCUS
INDUSTRIAL USE OF WINE

Grapes → Pressed Skin
   ↓        ↓
Juice  Musts  Lees  Marc
   ↓        ↓
Wine
   ↓
Direct human consumption → Industrial use / Transformation (not considered wine anymore ...)
   ↓
Distillation
   ↓
Wine distillates
   ↓
Wine spirits
   ↓
Brandy/Weinbrand
   ↓
Neutral alcohol of vitivinicultural origin
   ↓
Wine based beverages
   ↓
Aromatised wine
   ↓
Beverages based on viticultural products
   ↓
Beverage obtained by dealcoholisation of wine
   ↓
Acetic Fermentation
   ↓
Wine vinegars
   ↓
Incorporation in other products
   ↓
Sauces, marinades, sauerkraut, cosmetics, ...
INDUSTRIAL USES OF WINE

In 2016, 13% of world wine production (almost 34 mhl) was used for industrial purposes.
INTERNATIONAL TRADE OF WINE
GLOBAL WINE TRADE

Volume

108 million hl in 2018
-0.7% /2017

Value

31 billion € in 2018
+1.2% /2017

Volume, by type of product in % 2018

- Sparkling: 9%
- BiB: 4%
- Bulk (>10L): 33%
- Bottle: 54%

Value, by type of product in % 2018

- Sparkling: 20%
- BiB: 2%
- Bulk (>10L): 9%
- Bottle: 70%
MAIN WINE EXPORTERS IN 2018

Wine exports are dominated by Spain, Italy and France that combined represent about 50% of the world market by volume.

France and Italy represent 30% and 20% respectively of the global wine exports value.
MAIN WINE IMPORTERS IN 2018

Germany, the UK and the USA represent 37% of the world imports volume.

The five principal importers represent over 50% of the global imports value.
Towards an increasingly internationalized sector: in 2000 27% of the wine consumed was imported, in 2018 this share reached 44%
THANK YOU FOR YOUR ATTENTION

WISHING YOU A GREAT CONGRESS!

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