

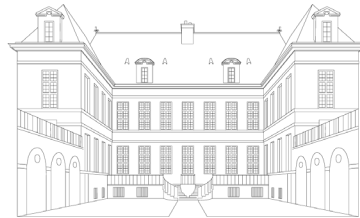


World Wine Production Outlook

OIV First Estimates
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International Organisation of Vine and Wine
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OIV



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In 2023, world wine production is expected to be the smallest in the last 60 years.

This is due to the combination of extremely low harvest volumes in the Southern Hemisphere as well as in some major European Union countries.

Low production volume in the European Union is expected. Italy and Spain record a significant decrease with respect to 2022 due to unfavourable weather conditions that led to downy mildew and droughts. France becomes the largest world producer in 2023, with a volume slightly above its five-year average.

First harvest forecasts in the **USA** indicate that production volume will be not only higher than in 2022 but also above the average observed in the last years.

In the Southern Hemisphere wine production volumes are expected to be well below 2022 figures. Australia, Argentina, Chile, South Africa, and Brazil were all heavily affected by adverse weather conditions. The only exception is New Zealand, the only country with a 2023 production level above its five-year average.

Abbreviations:

mhl: millions of hectolitres



World production

Based on the information collected on twenty-nine countries, which account for 94% of the global production in 2022, world wine production (excluding juices and musts) in 2023 is estimated between 241.7 mhl and 246.6 mhl, with a mid-range estimate at 244.1 mhl¹. **This represents a decrease of 7% compared to the already below-average volume of 2022.**

Figure 1 illustrates the drop in world wine production after a stable trend for four consecutive years. The 2023 production volume is forecasted to be the smallest since 1961 (214 mhl), even lower than the historically small production volume of 2017 (248 mhl). This negative scenario can be attributed to significant declines in major wine-producing countries in both Hemispheres. While in the Southern Hemisphere, Australia, Argentina, Chile, South Africa, and Brazil recorded year-over-year variations between -10% and -30%, in the Northern Hemisphere, Italy, Spain and Greece are the countries that suffered the most from bad climatic conditions during the growing season. Only the USA and a few EU countries like Germany, Portugal and Romania, experienced favourable climatic conditions that resulted in average or above-average volumes.

Once again, extreme climatic conditions - such as early frost, heavy rainfall, and drought - have significantly impacted the output of the world vineyard. However, in a context where global consumption is declining and stocks are high in many regions of the world, the expected low production could bring equilibrium to the world market.

Northern hemisphere

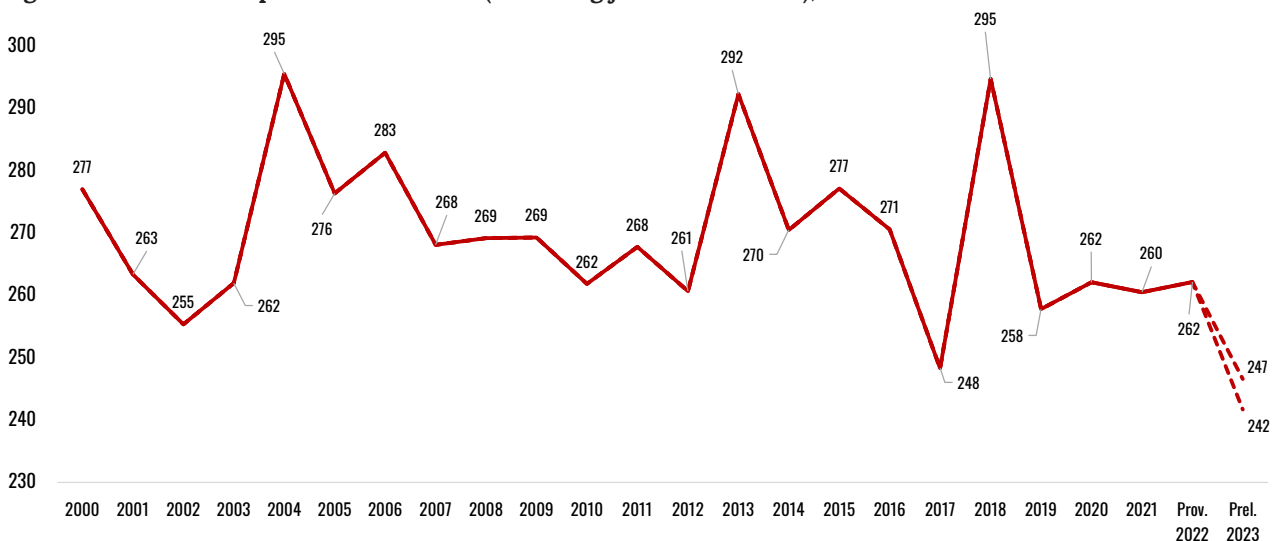
European Union (EU)

In the European Union (EU), wine production volume (excluding juices and musts) in 2023 is expected to be **150 mhl**, which represents a year-over-year decrease of 11.2 mhl. In relative terms, this estimated volume is 7% lower than in 2022 and 8% below the last five-year average. Overall, the EU wine production in 2023 represents **61%** of the world total, a figure in line with the last ten years' average.

If this estimate is confirmed in the next months, this is going to be the third lowest production level recorded since the beginning of the century, after 2017 (141 mhl) and 2012 (148 mhl).

Preliminary estimates for wine production in EU countries in 2023 show a quite heterogeneous scenario, with different climatic conditions recorded in the main wine regions throughout the growing season. In some countries, a rainy spring led to fungal pressure, while storms and hail caused floods, damages, and losses in the vineyards. On the contrary, in other regions, concentrated especially in the south of the EU, severe droughts caused hydric stress to the vines. Only a few countries saw good climatic conditions which resulted in average or above-average harvest volumes.

Figure 1 - World wine production volume (excluding juices and musts), 2000-2023



¹ It should be noted that the world figure for 2023 is still preliminary and therefore should be taken with caution as countries might significantly revise their estimates in the coming months and there are still large countries such as China for which information is not available yet. In addition to this, the volatility in production volumes observed over the last years at country or regional levels makes the forecasting exercise particularly difficult.



In this context, **France** has become the first producer in the world this year with an estimated wine production of 45.8 mhl, perfectly in line with its 2022 level and 3% above its last five-year average. This year's harvest can be considered relatively large, even though some regions recorded negative variations with respect to 2022. It is the case of Bordeaux and Sud-Ouest which suffered from the attacks of downy mildew, and Languedoc-Roussillon that was hit by heatwaves and drought. Particularly high volumes are expected from the Cognac region, Corsica and Champagne.

2023 is a complicated year for wine production in the other two largest EU producing countries. **Italy** recorded a notable decrease in the volume of its wine production in 2023 estimated at **43.9 mhl** (-12% / 2022). This is the smallest production since the historically low harvest in 2017. Many factors can be attributed to this low output, notably the heavy rainfalls that caused downy mildew to thrive in central and southern regions. In addition, part of the Italian vineyard was hit by floods, hailstorms, and drought.

Spain maintains its position as the third largest wine producer in the world with an estimated volume of **30.7 mhl**, which represents a decrease of 14% relative to 2022 and -19% compared to its last five-year average. The 2023 level is expected to be the lowest in the last 20 years. The low harvest volume is the consequence of a severe drought and extreme temperatures that strongly hit the vines. Castilla-La Mancha, the largest wine-producing region, is expected to decrease its production between 10 and 15% with respect to last year.

Regarding the other major wine-producing countries in the EU, positive growth rates are expected in **Germany** (**9.0 mhl**, +1% / 2022), **Portugal** (**7.4 mhl**, +8% / 2022) and **Romania** (**4.4 mhl**, +15% / 2022).

In these three countries, production volumes are expected to be also higher than their last five-year averages by 2%, 12% and 4%, respectively. Similarly, **Hungary** (**2.5 mhl**, +1% / 2022), **Bulgaria** (**0.9 mhl**, +7% / 2022), and **Slovenia** (**0.6 mhl**, +6% / 2022) have all increased their production with respect to 2022; however, the expected levels are below their last five-year averages. Overall, in all these countries, the growing season was marked by hot and dry conditions, and the summer rainfalls led to high yields.

Several countries within the EU expect a decrease in production with respect to 2022. **Austria**, the seventh largest European wine producer, has an estimated 2023 wine production volume of **2.4 mhl** (-7% / 2022), following a turbulent and challenging growing season that was marked by severe storms. One of the countries that shows the largest negative variation with respect to 2022 is **Greece**, with an expected wine production in 2023 of **1.1 mhl**. This volume represents a significant decrease not only from last year (-45%) but also from its last five-year average (-50%). This can be attributed to the heavy rainfalls during spring which caused grape diseases (notably downy mildew) and to elevated temperatures and drought in summer months that strongly impacted the vines. The **Czech Republic** estimates a wine production of **0.5 mhl**, a figure 13% lower than in 2022 and 14% below its five-year average. **Croatia** reports a production volume of **0.4 mhl** in 2023, a level 41% below 2022 and 46% lower than its five-year average. This low harvest was the consequence of adverse weather conditions and an outbreak of downy mildew. Lastly, **Slovakia** has an estimated wine production volume of **0.3 mhl**, which is 20% smaller than the 2022 figure.

Figure 2 - Wine production in the EU27 (excluding juices and musts), 2000-2023

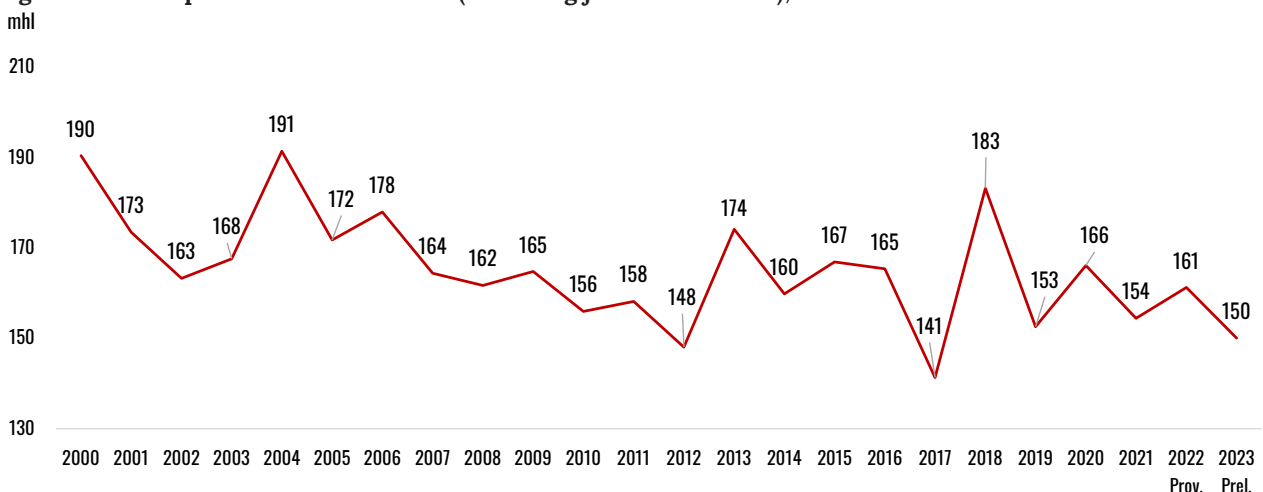




Table 1: Wine production (excluding juices and musts) in EU countries

Unit: mhl	2018	2019	2020	2021	Prov. 2022	Prel. 2023	23/22 Var.	23/22 Var. (%)	5-year Average	5-year Var. (%)
France	49.2	42.2	46.7	37.6	45.8	45.8	-0.0	-0%	44.3	3%
Italy	54.8	47.5	49.1	50.2	49.8	43.9	-5.9	-12%	50.3	-13%
Spain	44.9	33.7	40.9	35.5	35.7	30.7	-5.0	-14%	38.1	-19%
Germany	10.3	8.2	8.4	8.4	8.9	9.0	0.1	1%	8.9	2%
Portugal	6.1	6.5	6.4	7.4	6.8	7.4	0.6	8%	6.6	12%
Romania	5.1	3.8	3.8	4.5	3.8	4.4	0.6	15%	4.2	4%
Hungary	3.6	2.4	2.6	2.6	2.5	2.5	0.0	1%	2.7	-8%
Austria	2.8	2.5	2.4	2.5	2.5	2.4	-0.2	-7%	2.5	-6%
Greece	2.2	2.4	2.2	2.4	2.1	1.1	-0.9	-45%	2.3	-50%
Bulgaria	1.1	0.9	0.9	0.9	0.8	0.9	0.1	7%	0.9	-6%
Slovenia	0.9	0.8	0.7	0.6	0.5	0.6	0.0	6%	0.7	-18%
Czech Rep.	0.7	0.5	0.6	0.6	0.6	0.5	-0.1	-13%	0.6	-14%
Croatia	1.0	0.7	0.8	0.8	0.7	0.4	-0.3	-41%	0.8	-46%
Slovakia	0.4	0.3	0.4	0.3	0.3	0.3	-0.1	-20%	0.3	-23%
Luxembourg	0.1	0.1	0.1	0.1	0.1	0.1	0.0	8%	0.1	24%
Cyprus	0.1	0.1	0.1	0.1	0.1	0.1	-0.0	-9%	0.1	-20%
Malta	0.0	0.0	0.0	0.0	0.0	0.0	-0.0	-32%	0.0	-32%
EU27	183	153	166	154	161	150	-11.2	-7%	163.5	-8%

Outside EU

In the **USA**, fourth producer at the world level, the preliminary estimate for 2023 wine production is **25.2 mhl**. This figure is 12% higher compared to 2022, and 4% above its five-year average. This growth has been favoured by cool temperatures and heavy winter rains in the Napa and Sonoma regions, bringing much-needed moisture to the vines after several years of drought.

At this time of the year, data on grape harvest in China is not available. The first estimates for the year 2023 will be provided in the first semester of 2024.

As for the Eastern European countries, wine production in **Russia** is estimated at **4.9 mhl**, a figure in line with the 2022 volume and 9% higher with respect to its last five-year average.

In **Georgia**, wine production in 2023 is estimated to be **1.5 mhl**, a decline of 28% compared to 2022 volume, and 19% below its five-year average. This relatively low volume is due to unfavourable weather conditions such as heavy rainfalls, hail, and intense winds, which severely impacted the Eastern wine regions of the country. Similarly, **Moldova** is expected to produce **1.3 mhl** of wine in 2023, a decline of 10% with respect to 2022.

In **Switzerland**, wine production is expected to be relatively high in 2023 at **1.0 mhl**, a level which is 4% higher than in 2022 and 14% above its last five-year average.



Table 2: Wine production (excluding juices and musts) in major countries² in the Northern Hemisphere outside EU

<i>Unit: mhl</i>	2018	2019	2020	2021	Prov. 2022	Prel. 2023	23/22 Var.	23/22 Var. (%)	5-year Average	5-year Var. (%)
USA*	26.1	25.6	22.8	24.1	22.4	25.2	2.8	12%	24.2	4%
China**	9.3	7.8	6.6	5.9	4.2	NA			6.8	
Russia	4.3	4.6	4.4	4.3	4.9	4.9	0.0	0%	4.5	9%
Georgia	1.7	1.8	1.8	2.1	2.1	1.5	-0.6	-28%	1.9	-19%
Moldova	1.9	1.5	0.9	1.4	1.4	1.3	-0.1	-10%	1.4	-11%
Switzerland	1.1	1.0	0.8	0.6	1.0	1.0	0.0	4%	0.9	14%

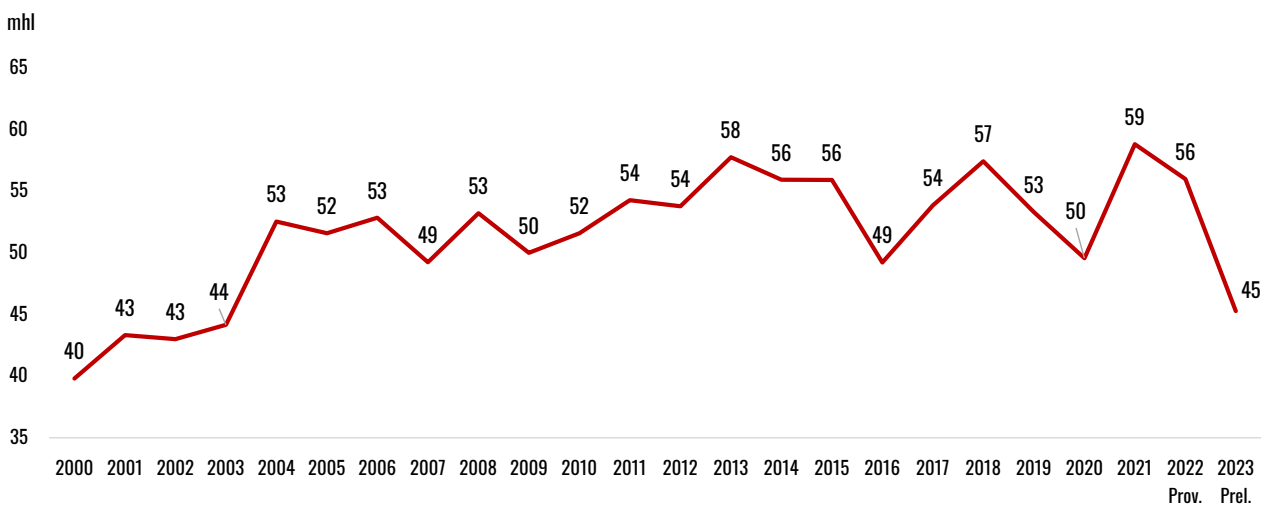
* OIV estimate based on USDA harvest figures
 ** OIV estimate based on China NBS and FAO
 NA: not available

Southern hemisphere

In the Southern Hemisphere, where harvests end in the first half of 2023, preliminary figures on wine production tend to be more accurate and reliable in this period of the year. After a record-high 2021 harvest and a relative decline in 2022 volumes, the wine production estimate in 2023 for the Southern Hemisphere is **45 mhl**, which represents not only a decrease of 19% compared to 2022 but also a decline of 18% with respect to the last five-year average.

This is the lowest production level recorded since 2003 and can be attributed to extreme climatic events that took place during the growing season in all major wine-producing regions. Overall, wine production for the Southern Hemisphere in 2023 is expected to account for **19%** of the world total.

Figure 3 - Wine production in the Southern Hemisphere (excluding juices and musts), 2000-2023



² Countries with 2023 wine production equal to or above 1 million hectolitres.



All major South American wine-producing countries have registered a significant fall in production with respect to 2022. **Chile** is the largest producer in the Southern Hemisphere in 2023 with a wine production of **10 mhl**, a volume 20% below last year's high production and 18% lower than its five-year average. The harvest was severely affected by wildfires and droughts. In 2023, due to spring frosts and hailstorms, **Argentina's** wine production reached only **8.8 mhl** (-23% / 2022). This represents one of the lowest volumes recorded in its history.

Brazil has an estimated wine production volume of **2.3 mhl** in 2023. This figure represents a decrease of 30% with respect to high production in 2022, and it is mainly due to a lack of rain in some important wine regions such as Rio Grande do Sul. **Uruguay**, with an estimated 2023 production of **0.5 mhl**, recorded a large negative variation with respect to last year (- 34%), suffering from a severe drought coupled with heat waves.

In **South Africa**, wine production in 2023 is estimated at **9.3 mhl**, which marks a decrease of 10% compared to 2022 and 8% with respect to its last 5-year average. This year the harvest has been mainly affected by fungal disease pressure, particularly powdery and downy mildew.

Australia recorded a considerable reduction in wine production in 2023 with an estimate of **9.9 mhl**, which represents a decrease of 24% compared to 2022. This is due to the combination of persistent rainfall, unusually cold temperatures and floods caused by the effects of La Nina. Moreover, inventory pressure led to the imposition of yield caps to reduce the oversupply of stocks. The second largest producer in Oceania, **New Zealand**, represents an exception in the Southern Hemisphere: with a production of **3.6 mhl** (-6% / 2022), it is the only country with positive growth with respect to the average observed in the last five years (+14%).

Table 3: Wine production (excluding juices and musts) in major countries in the Southern Hemisphere

<i>Unit: mhl</i>	2018	2019	2020	2021	Prov. 2022	Prel. 2023	23/22 Var.	23/22 Var. (%)	5-year Average	5-year Var. (%)
Chile	12.9	11.9	10.3	13.4	12.4	10.0	-2.5	-20%	12.2	-18%
Australia	12.7	12.0	10.9	14.8	13.1	9.9	-3.1	-24%	12.7	-22%
South Africa	9.5	9.7	10.4	10.8	10.3	9.3	-1.0	-10%	10.2	-8%
Argentina	14.5	13.0	10.8	12.5	11.5	8.8	-2.6	-23%	12.5	-29%
New-Zealand	3.0	3.0	3.3	2.7	3.8	3.6	-0.2	-6%	3.2	14%
Brazil	3.1	2.2	2.3	2.9	3.2	2.3	-1.0	-30%	2.7	-18%
Uruguay	0.7	0.6	0.7	0.7	0.8	0.5	-0.3	-34%	0.7	-29%
Southern Hemisphere	57	53	50	59	56	45	-10.7	-19%	55.0	-18%



Note for editors:

- The OIV is the intergovernmental organisation of a scientific and technical nature of recognised competence for its work concerning vines, wine, wine-based beverages, table grapes, raisins and other vine-based products. It is composed of 50 Member States.
- In the framework of its competence, the objectives of the OIV are as follows:
 - to inform its members of measures whereby the concerns of producers, consumers and other players in the vine and wine products sector may be taken into consideration;
 - to assist other international organisations, both intergovernmental and non-governmental, especially those that carry out standardisation activities;
 - to contribute to international harmonisation of existing practices and standards and, as necessary, to the preparation of new international standards in order to improve the conditions for producing and marketing vine and wine products, and to help ensure that the interests of consumers are taken into account.

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