

World vitiviniculture situation

38th World Congress of Vine and Wine

Mainz, 6th July 2015

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Director General

State of the vitiviniculture world market

❖ Surface area

❖ Grape

- *Global grape production*
- *Grape for fresh consumption*
- *Dried Grape*

❖ Wine

- *Production*
- *Consumption*
- *Trade*

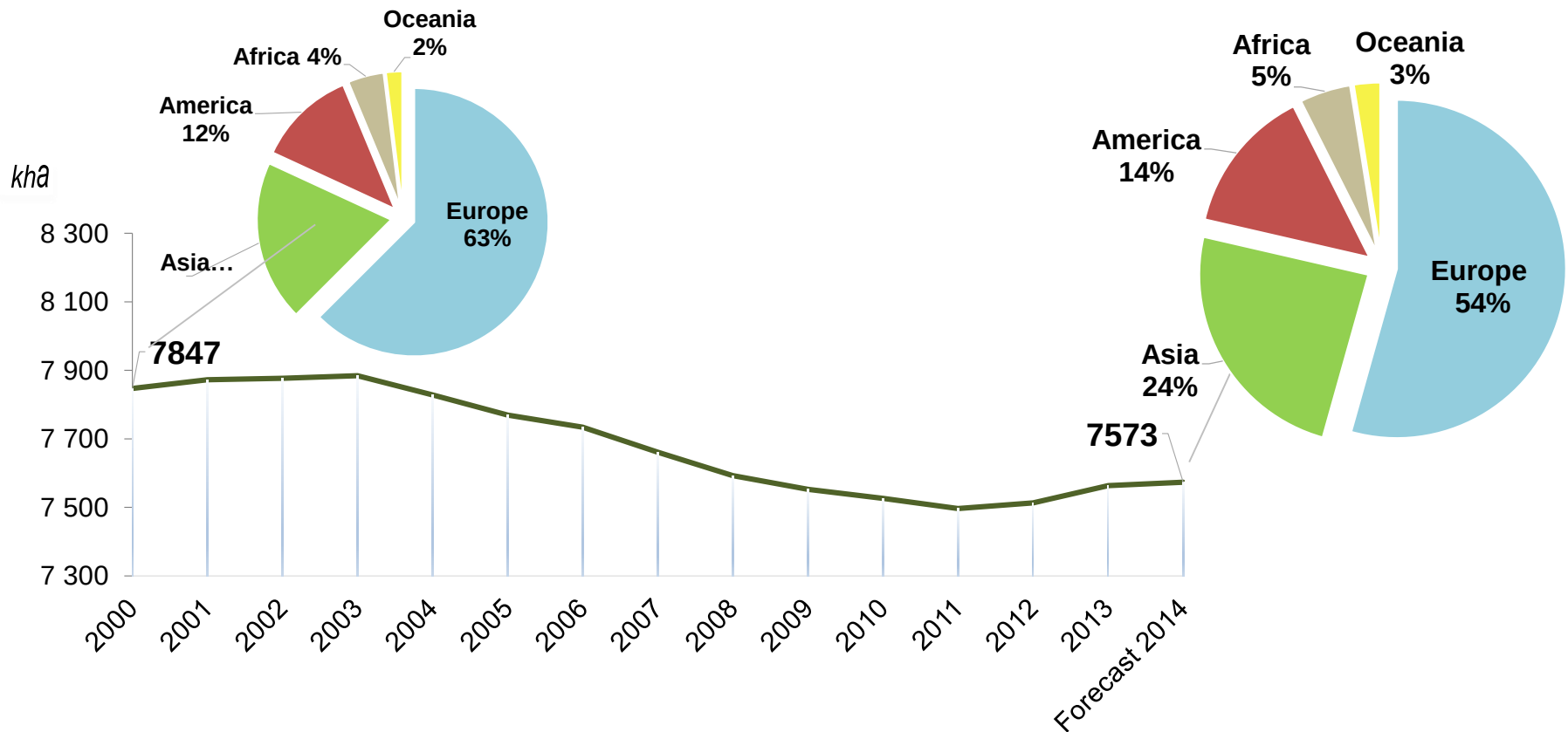
❖ 2015 Special focus: Rosé wine market



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Surface area of vineyards

Surface area of vineyards worldwide



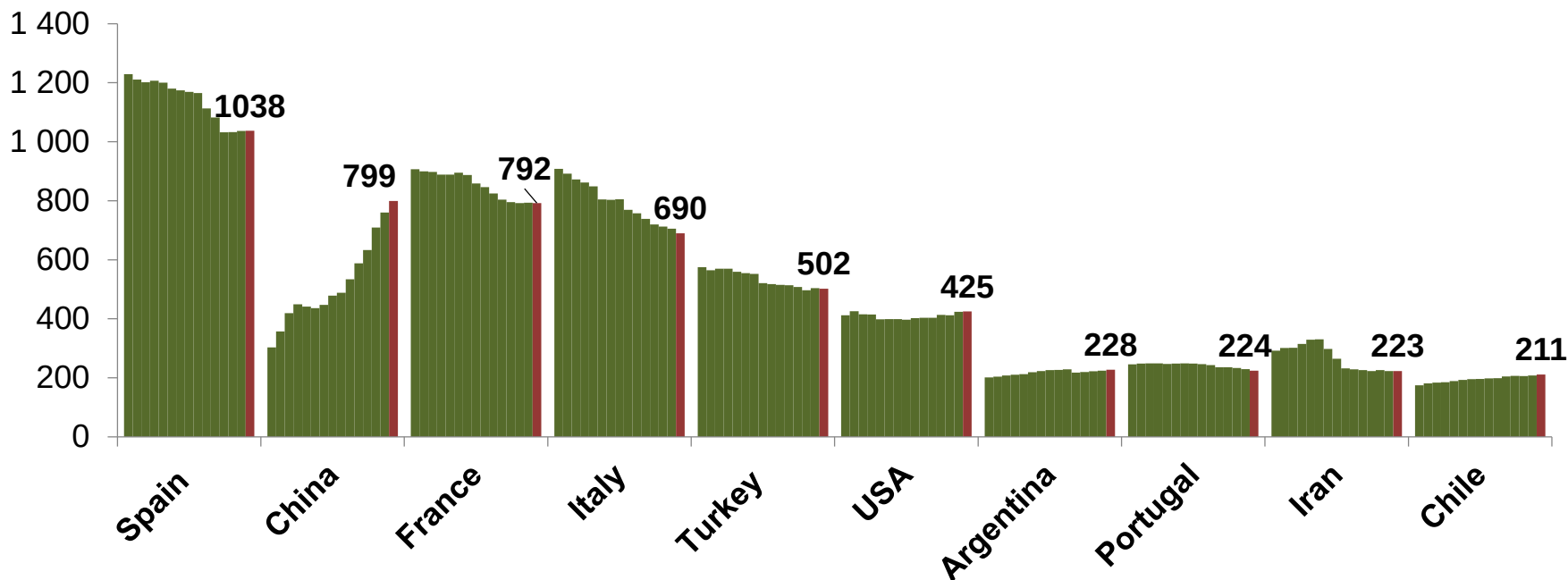
➤ **Europe's** share of world's vineyards has declined from 63% in 2000 to 54% in 2014, effect of EU permanent abandonment premiums ended in 2011

➤ the share of **all other regions is increasing**, in particular in Asia, which now accounts for 25% of the world's vineyards.

Recent developments of the leading vineyards

kha

Trends, 2000-14



Since 2000 :

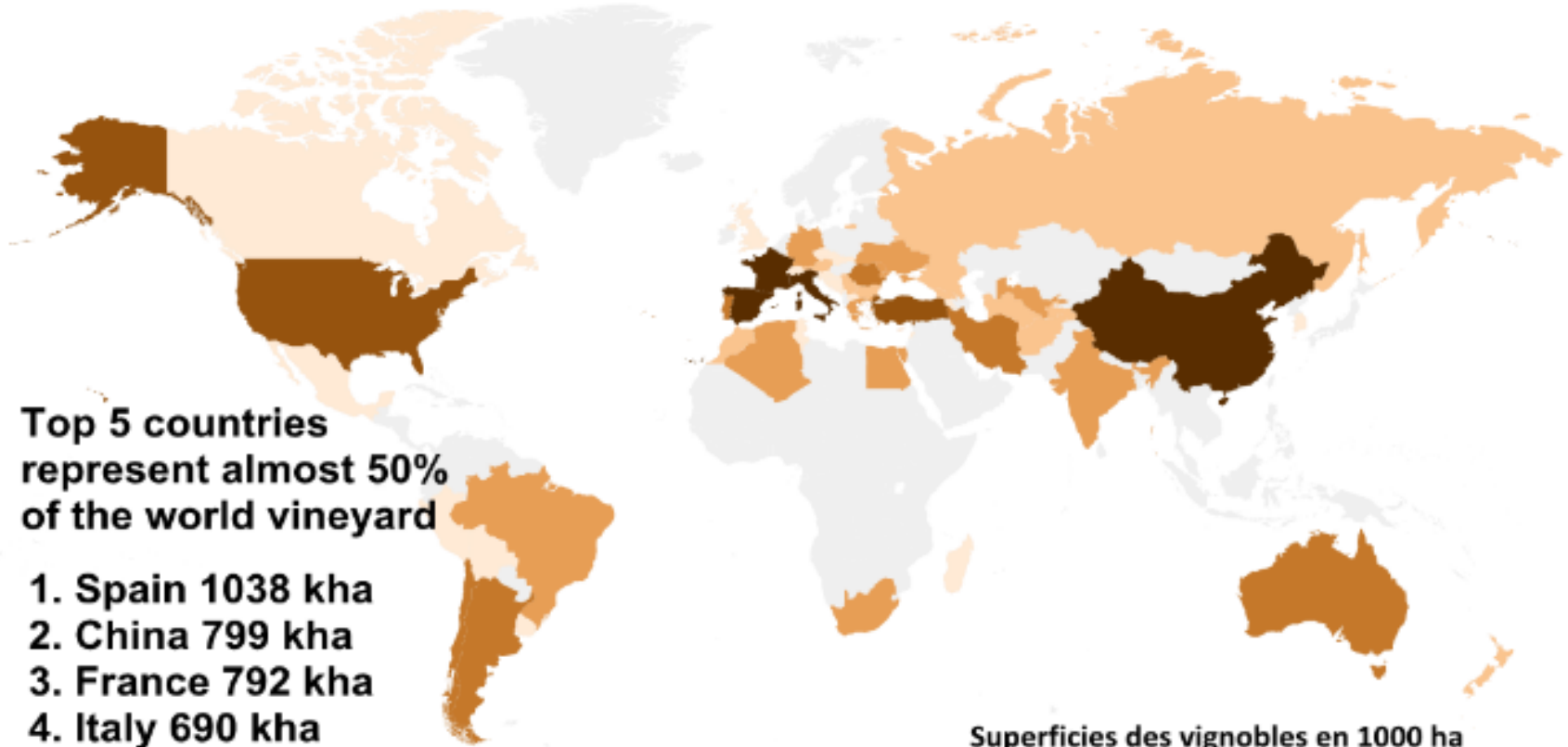
- area under vine has **fallen considerably** in Spain, France and Italy. Since the end in 2011 of the EU grubbing up programme the surface area is stable.
- **strong increasing** in China area under vines, which is now the 2nd world vineyard.
- vineyards and plantations are reducing in Turkey and Iran.



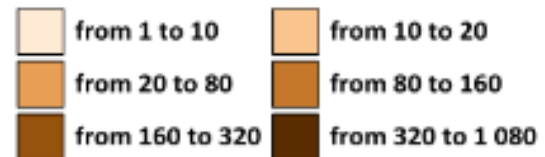
Vitivinicultural production potential

7573 kha is the global area under vines in 2014

including the area not yet in production, and regardless of the grapes' final destination



Superficies des vignobles en 1000 ha





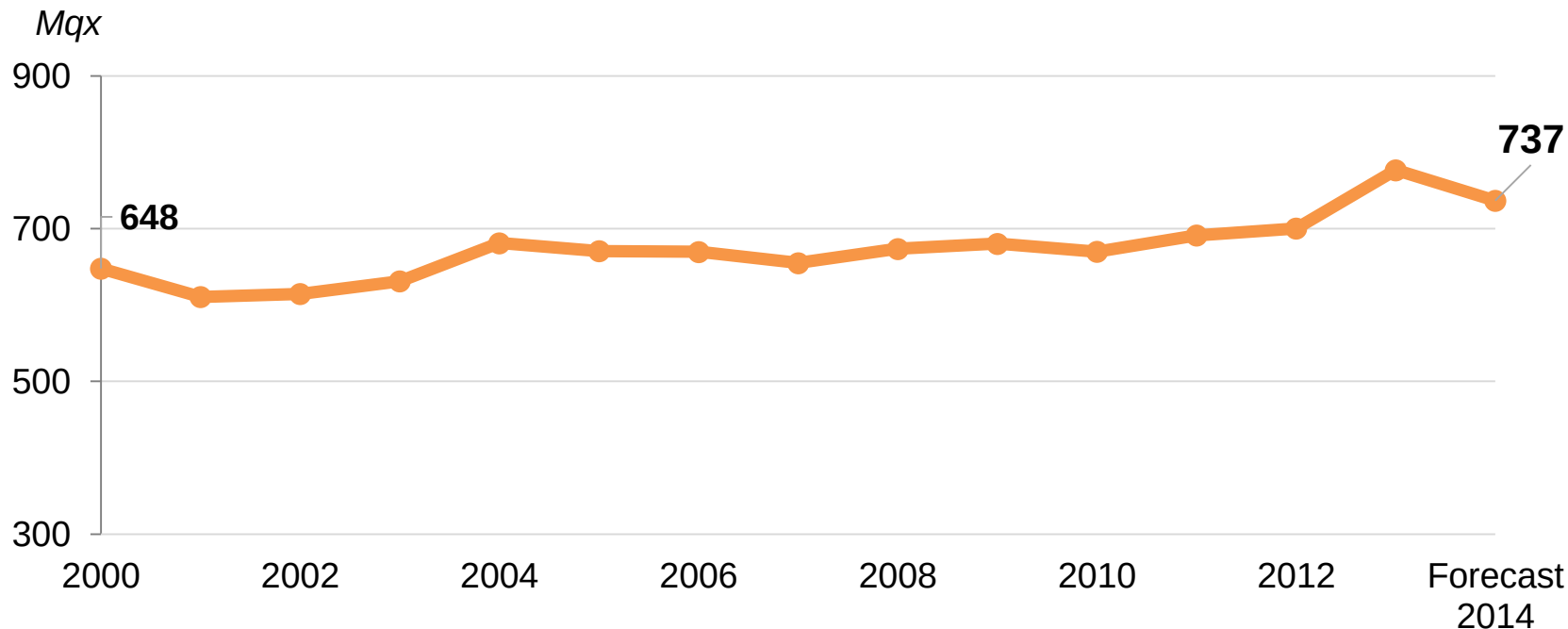
Grape

Global grape production

- *Grape for fresh consumption*
- *Dried Grapes*



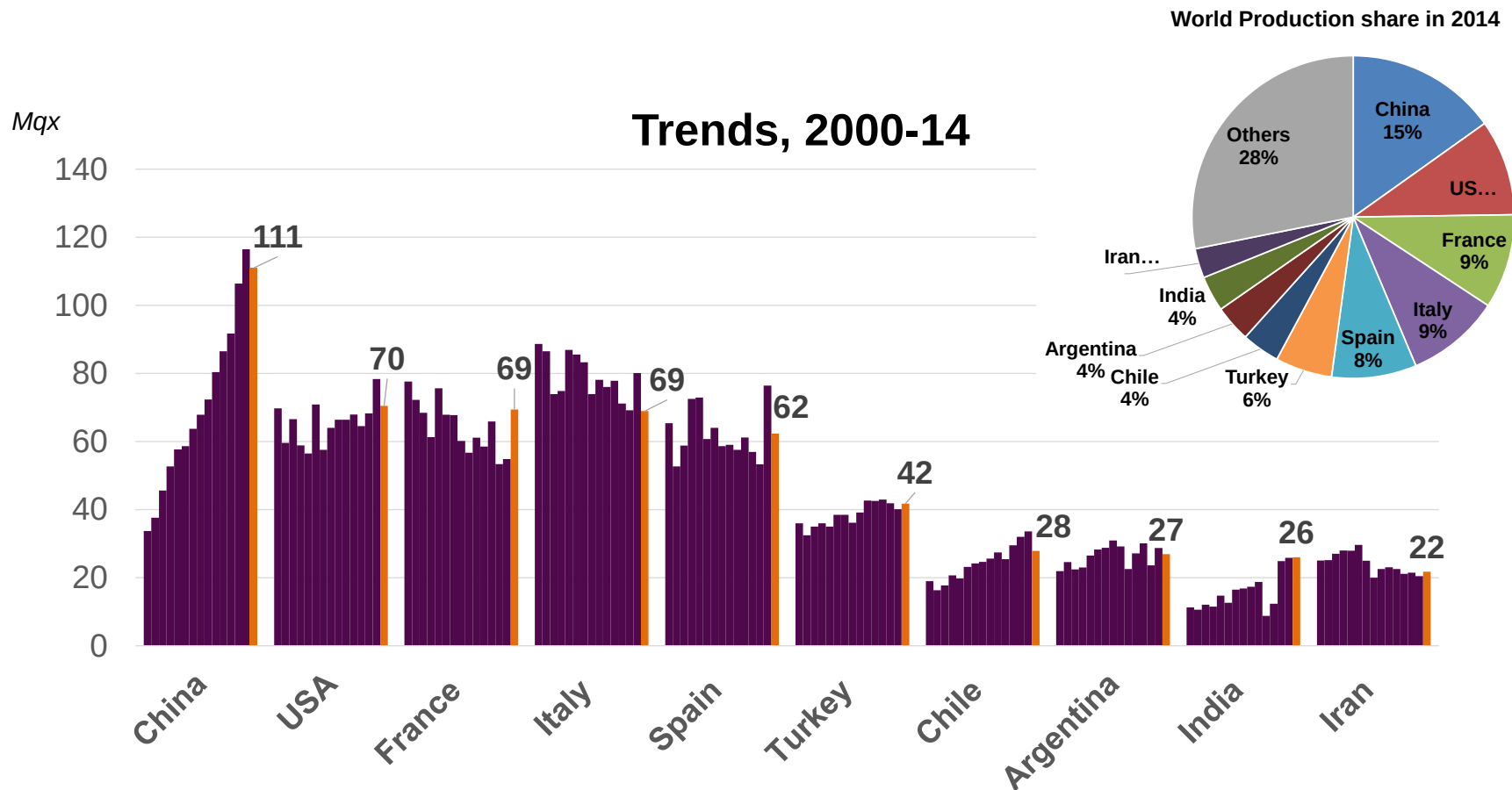
Global grape production



737 Mqx is the world global production of grapes in 2014.

While the area under vine decrease, grape production has been increasing since 2000 (+1,7%) : this partly due to an increase in yields.

Major grapes producers: all use



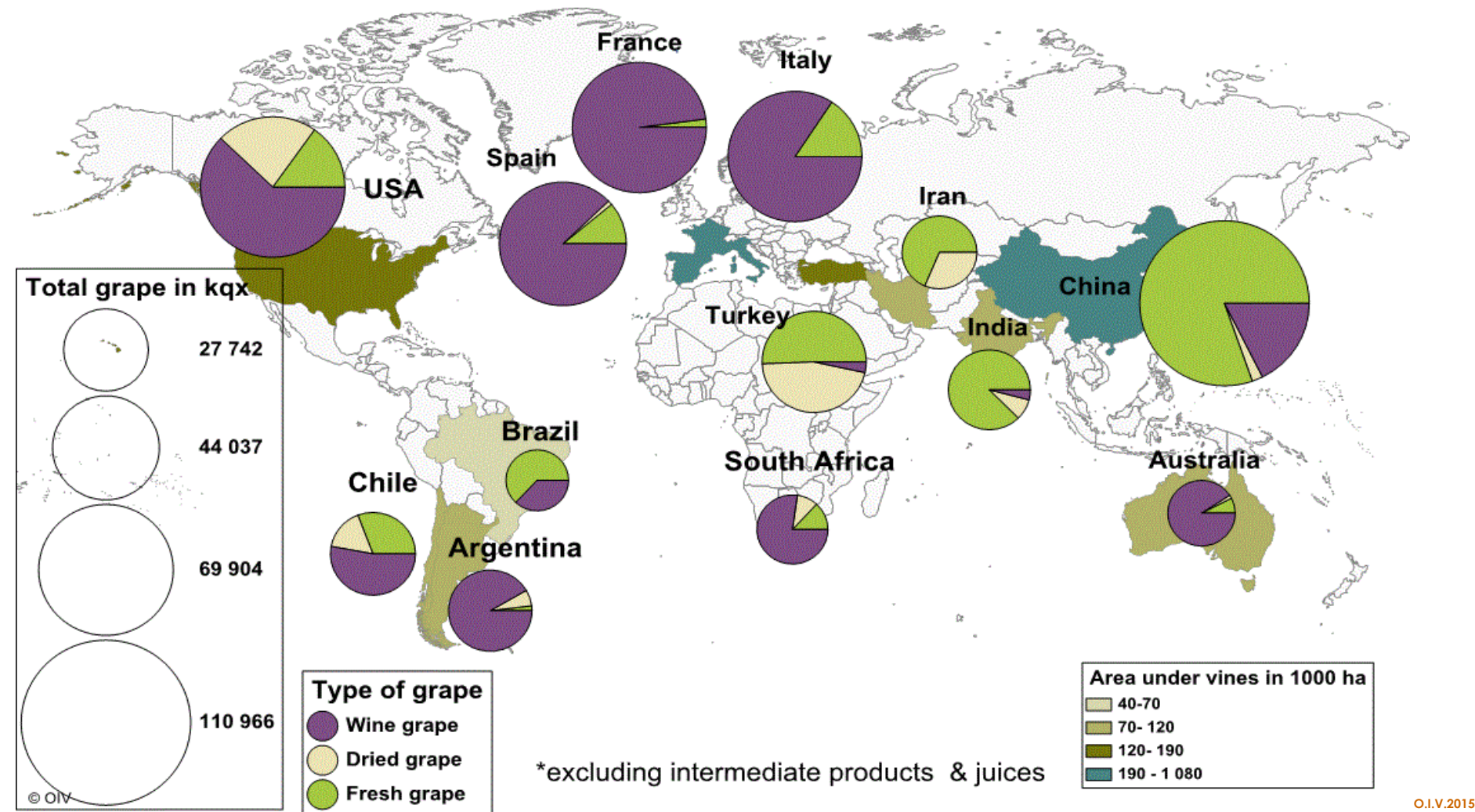
Growth in grapes production is particularly significant in China, India, USA and Chile, **decrease** in Italy, France, Spain and Iran.



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Grape production by type of products

Major grape producers by type of products*



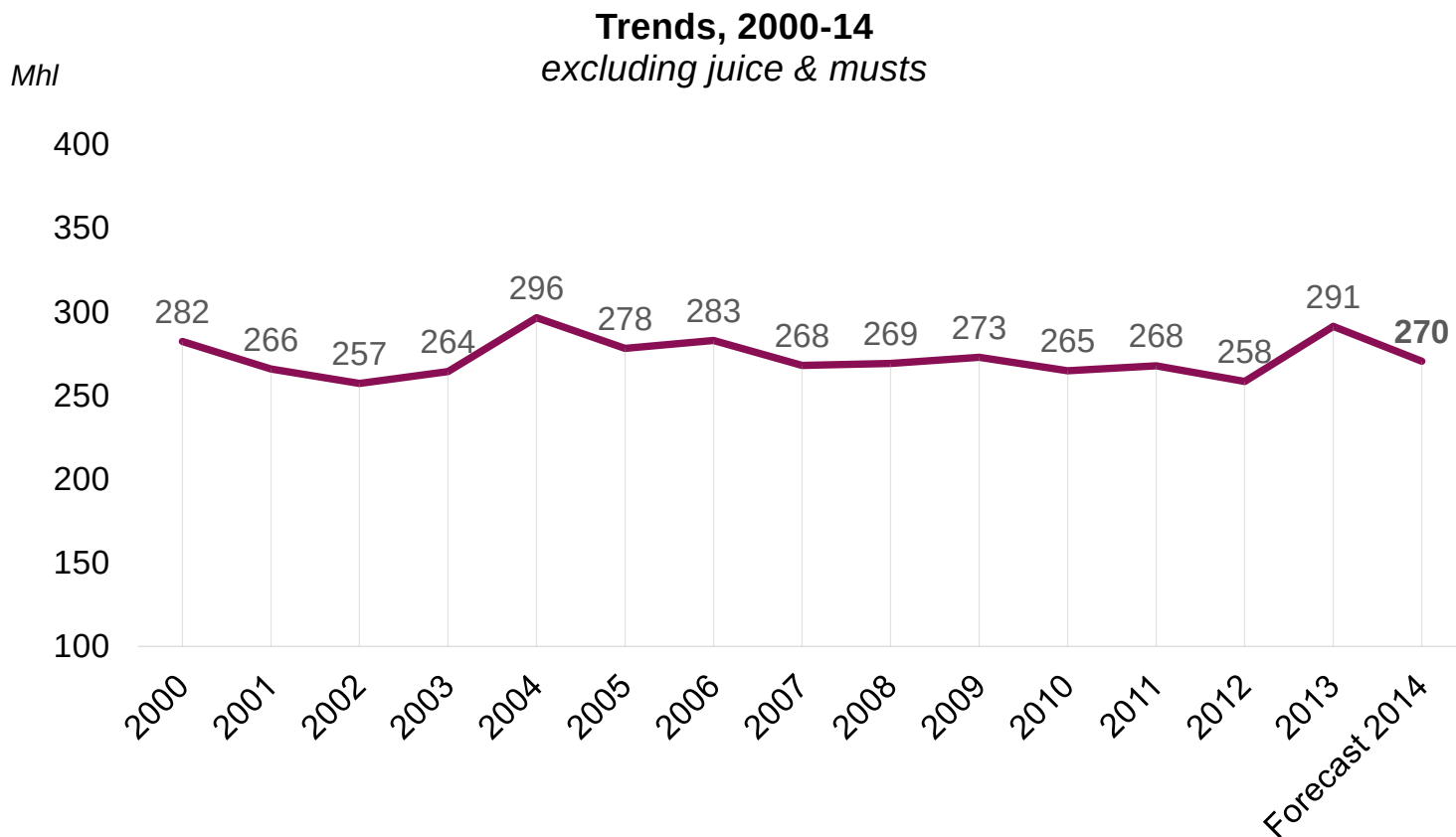


Wine

- *Production of wine*
- *Consumption of wine*
- *Wine trade*



World wine production



270 is the global wine production in 2014 – a decrease of 7% compared to 2013. This decrease is in parts due to bad weather in some countries.
A level almost equal to the average global wine production over the period 2000-2012.

Wine production (excluding juice and musts) ⁽¹⁾

	2010	2011	2012	2013	2014 Forecast (2)	2014/2013 Variation in volume	2014/2013 Variation in %
<i>Mhl</i>							
France	44,4	50,8	41,5	42	46,7	4,7	11%
Italy	48,5	42,8	45,6	54	44,7	-9,3	-17%
Spain	35,4	33,4	31,1	45,3	38,2	-7,1	-16%
USA	20,9	19,1	21,7	23,6	22,3	-1,3	-5%
Argentina	16,3	15,5	11,8	15	15,2	0,2	1%
Australia	11,4	11,2	12,3	12,3	12	-0,3	-2%
South Africa	9,3	9,7	10,6	11	11,3	0,3	3%
China	13	13,2	13,5	11,8	11,2	-0,6	-5%
Chile	8,8	10,5	12,6	12,8	10,5	-2,3	-18%
Germany	6,9	9,1	9,0	8,4	9,2	0,8	9%
Portugal	7,1	5,6	6,3	6,3	6,2	-0,1	-2%
Romania	3,3	4,1	3,3	5,1	3,7	-1,4	-27%
New Zealand	1,9	2,4	1,9	2,5	3,2	0,7	29%
Greece	3,0	2,8	3,1	3,3	2,9	-0,4	-13%
Brazil	2,5	3,5	3,0	2,7	2,7	0,0	1%
Hungary	1,8	2,8	1,8	2,7	2,6	-0,1	-4%
Austria	1,7	2,8	2,1	2,4	2	-0,4	-16%
OIV World Total	265	268	258	291	270	-21	-7%

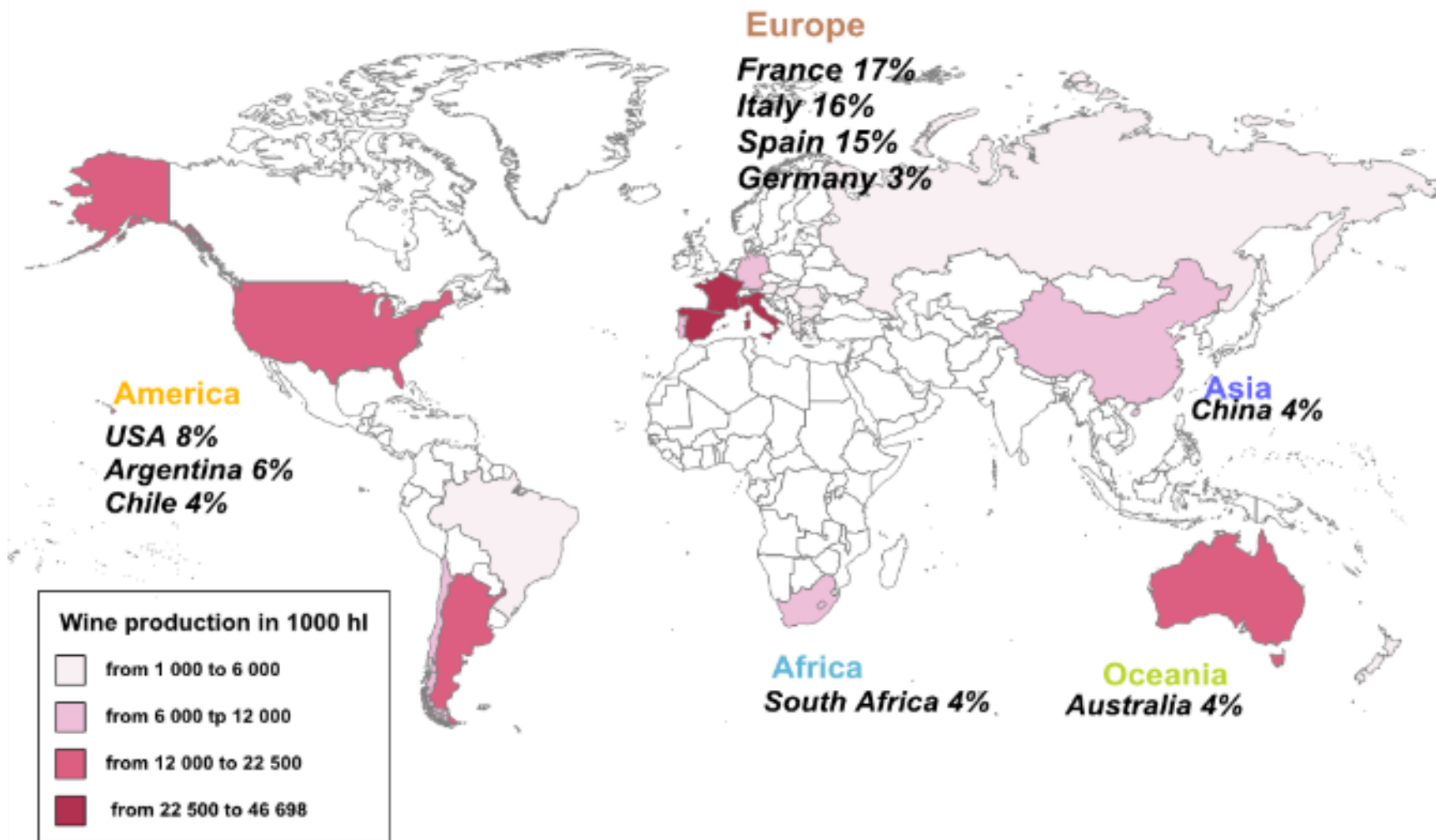
(1): Countries for which information has been provided with a wine production of more than 1 Mhl

(2): Include data/comments received by May 2015



2014 World Wine production: 270 Millions of hectolitres

80% of the world's wine is produced by ten countries





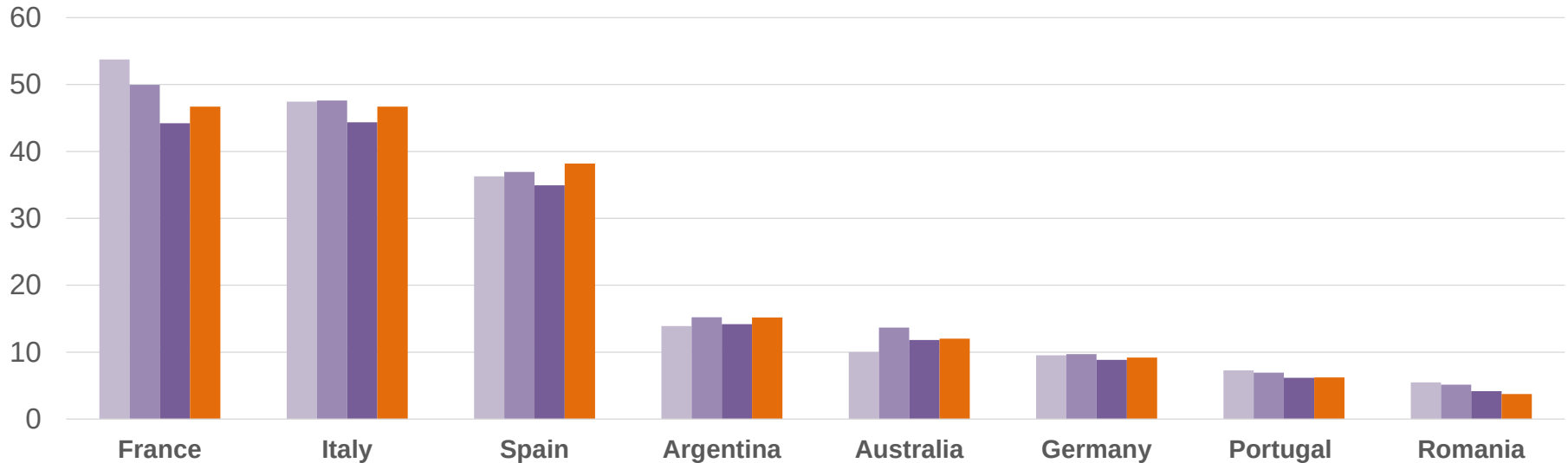
How is the 2014 wine
production compared with the
last 15 years?

*Countries with a **decreasing or stable** trend*

Mhl

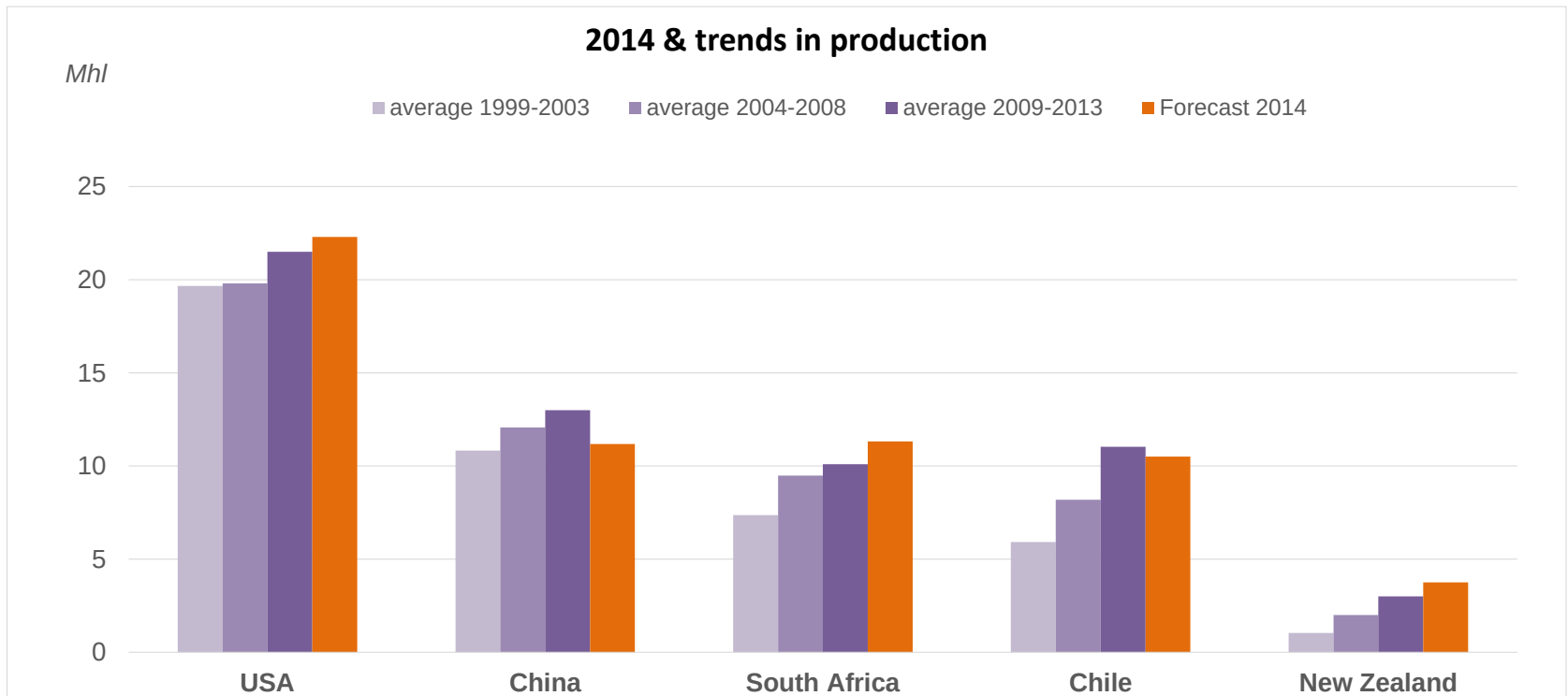
2014 & trends in production

■ average 1999-2003
 ■ average 2004-2008
 ■ average 2009-2013
 ■ Forecast 2014





*Countries with an **increasing** trend*

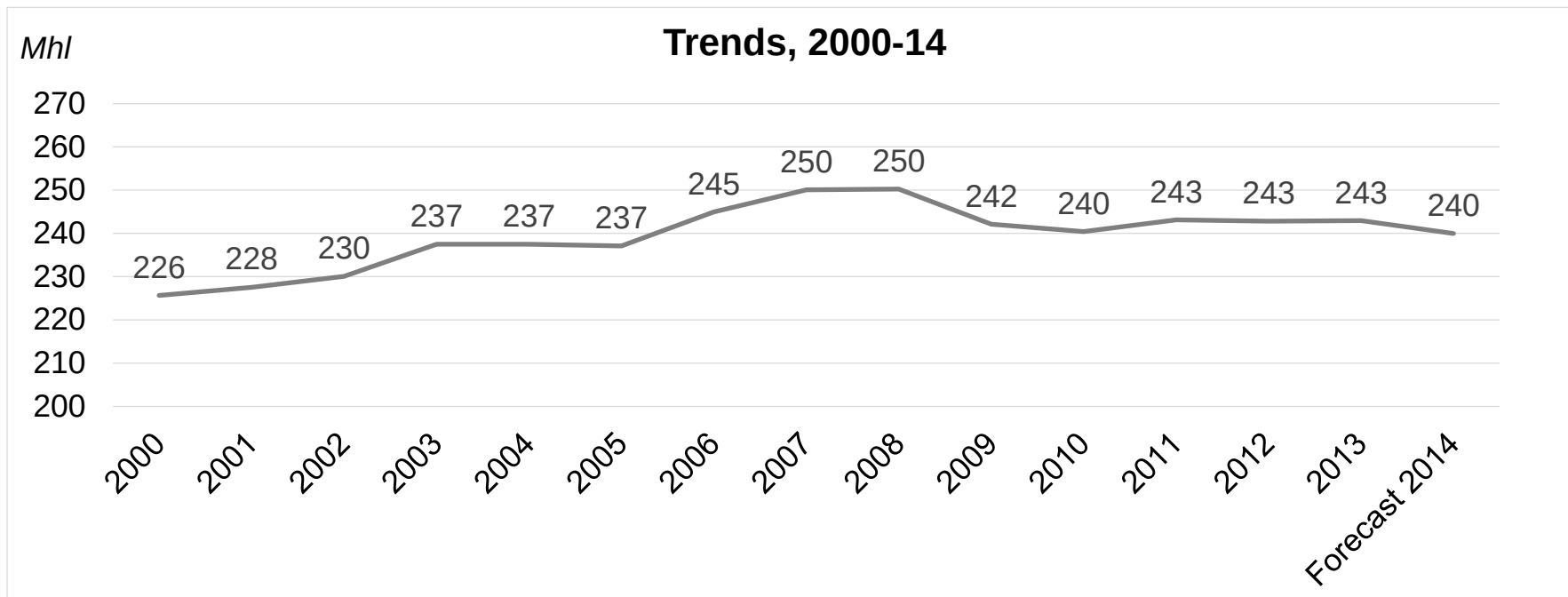




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Wine consumption

World wine consumption



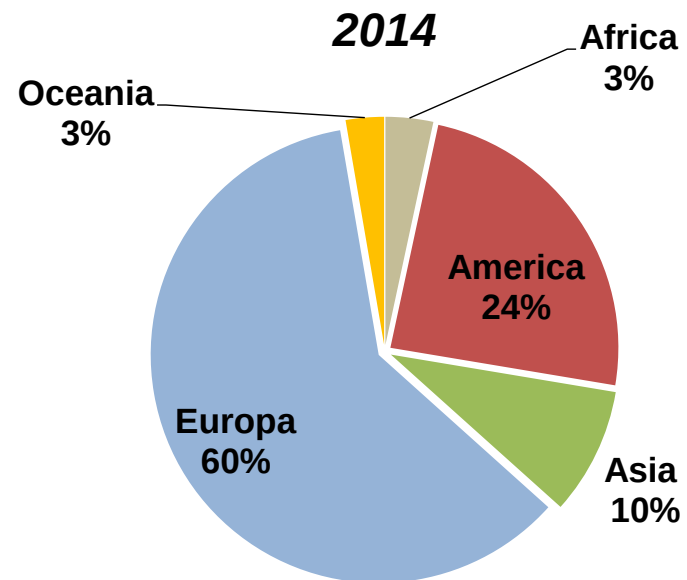
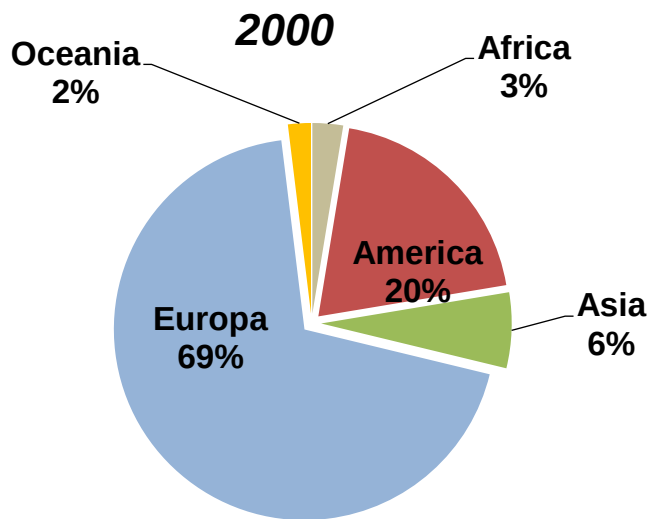
240 Mhl is the estimation for the wine consumption in 2014.

Wine consumption is still marked by the effects of the economic and financial crisis of 2008.

Shift in wine consumption geography

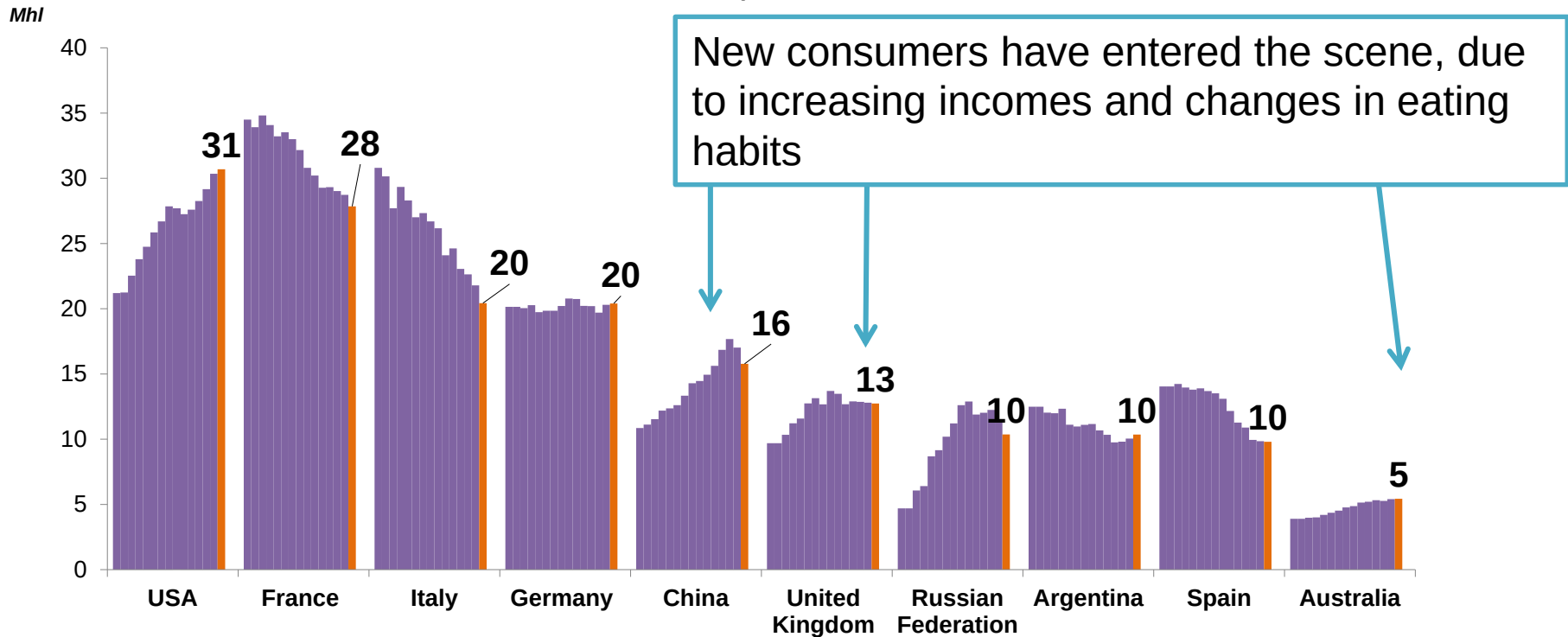
The 2000-2014 period has been characterized by a **shift in the wine consumption patterns**:

- today about 40% of the wine is consumed outside European countries, compared to 31% in 2000.



Major wine consumers

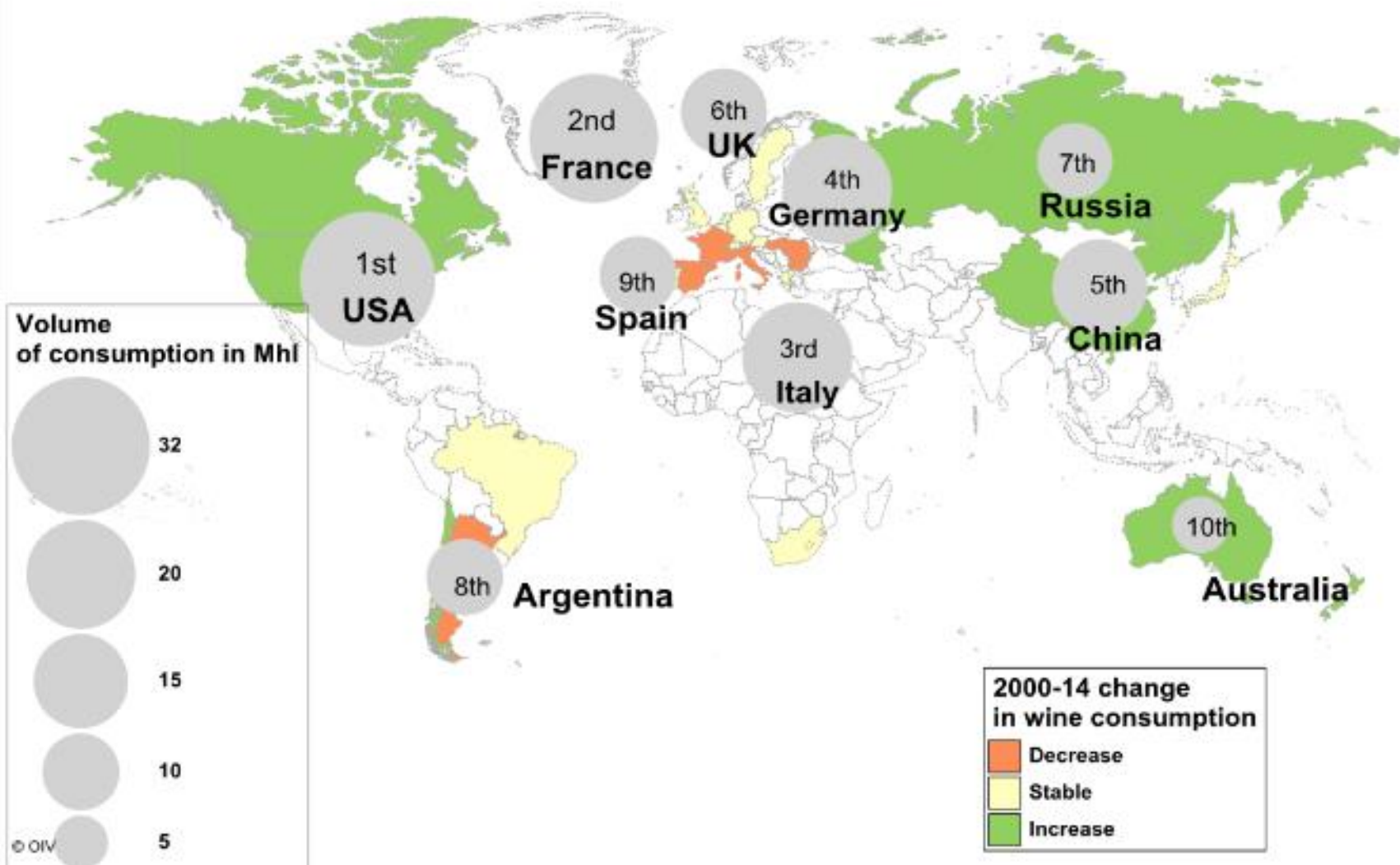
Trends, 2000-14



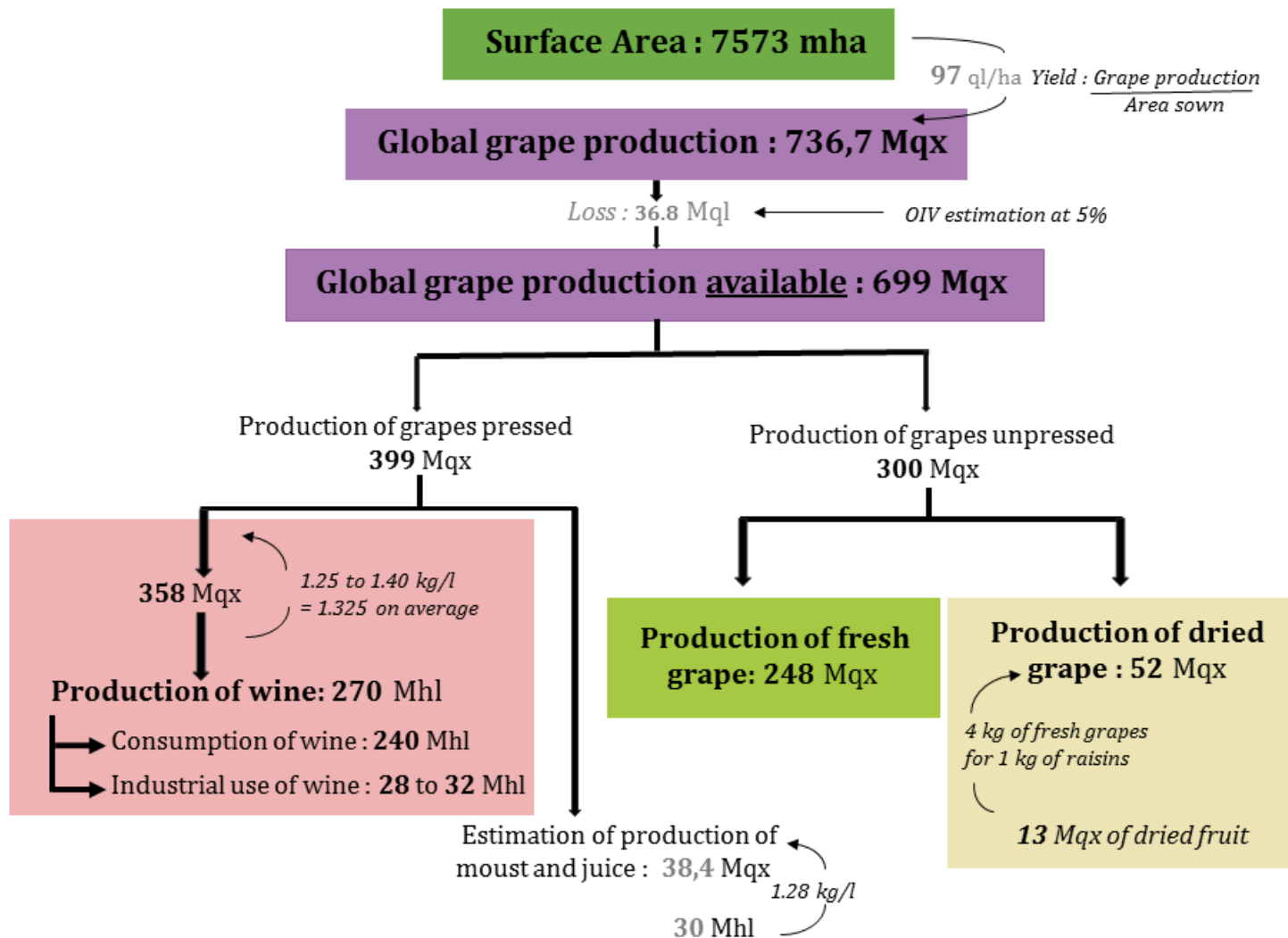
Traditional consumer countries continued their decline or stagnation to the advantage of new consumer countries in Northern Europe and outside Europe.



Top 10 wine consumers



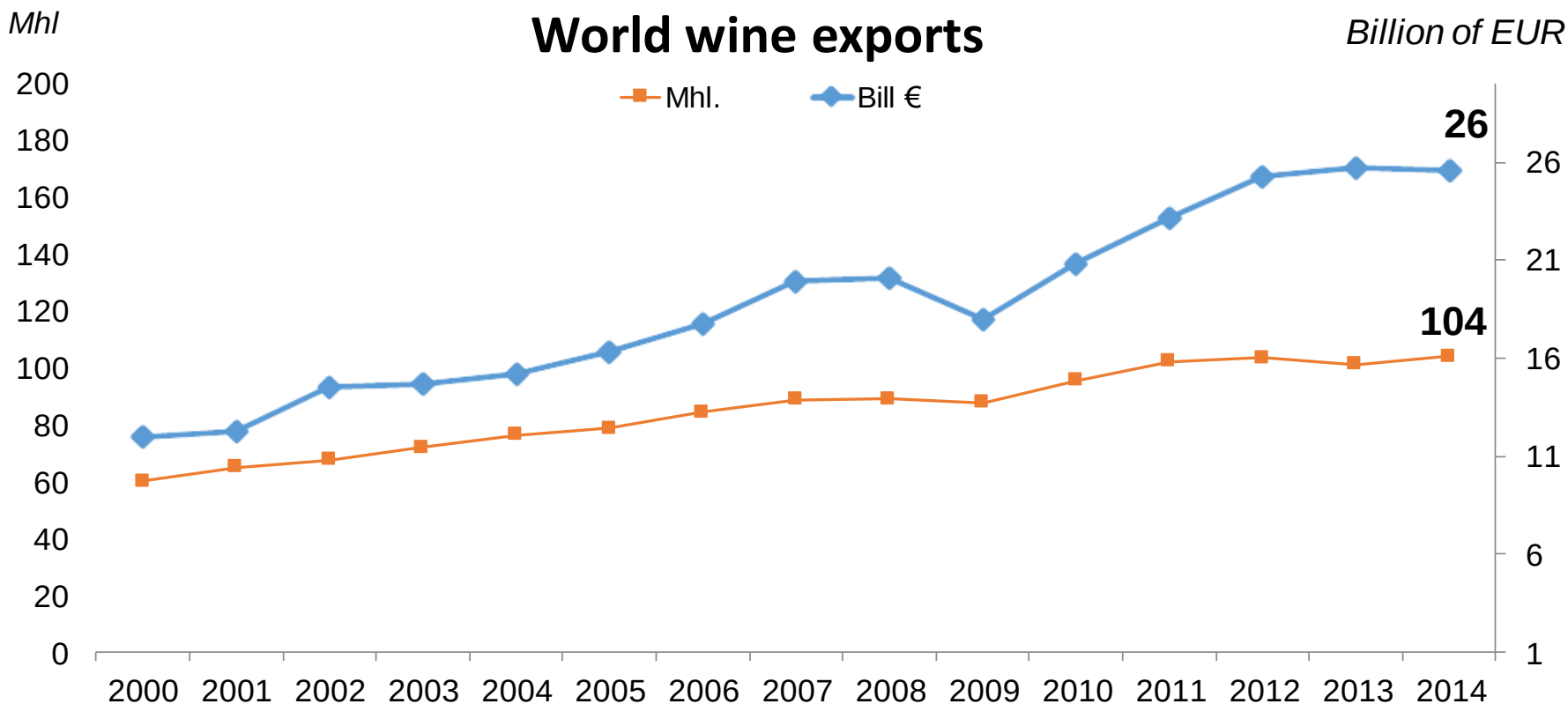
World vitiviniculture data framework: 2014





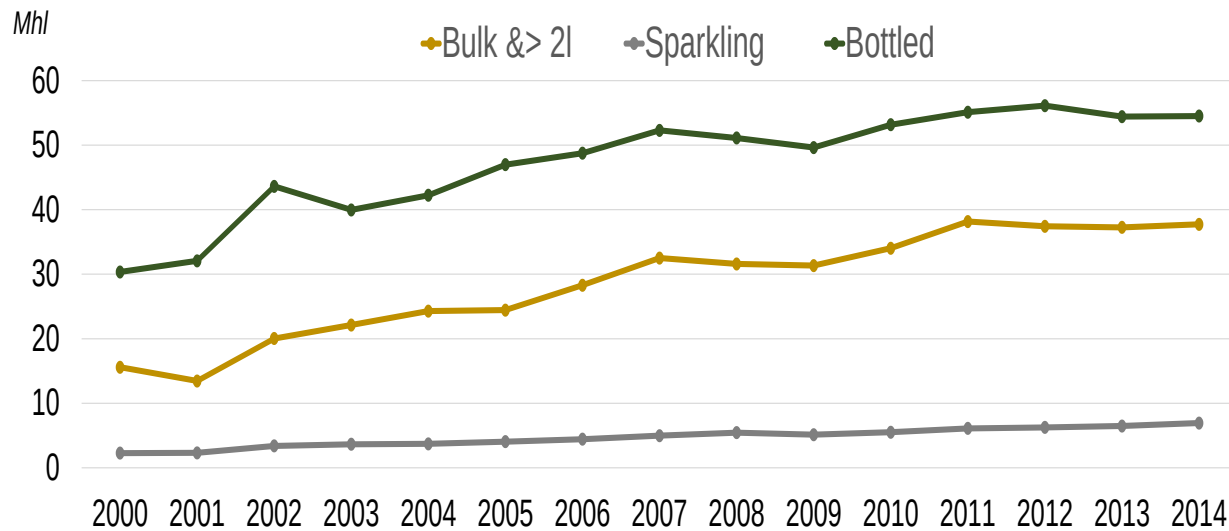
Wine trade

- *World wine trade: value & volume*
- *Top world Exporters*
- *Top world Importers*



In 2014 the trade in wine slightly increased by 2,5% in volume, representing 104 million of hl, but remained at the same level in value terms 26 Billion of Euros.

Evolution of the exports by type of product in volume since 2000

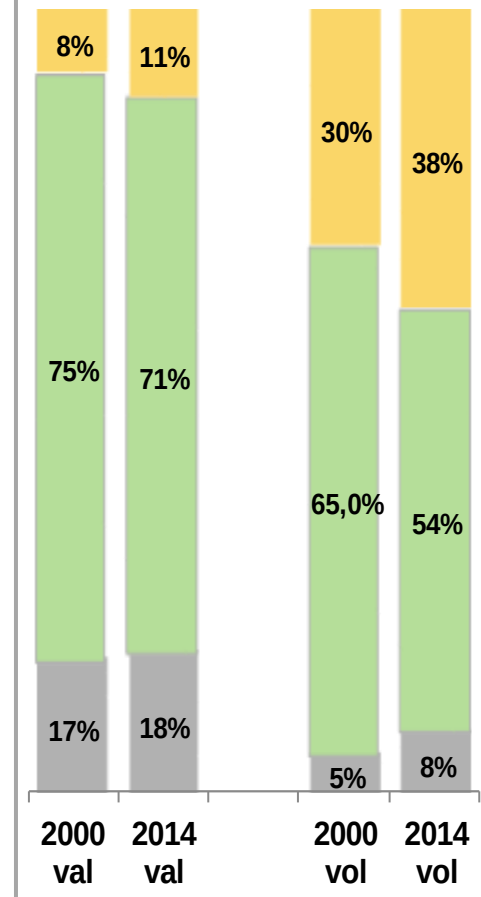


In the 2000-2014 period, the composition of exports significantly changed :

- the share of bottled wines reduced by 4 points in value and 12 points in volume
- while bulk wines increased.

World wine exports 2000 - 2014

■ Sparkling ■ Bottled ■ Bulk

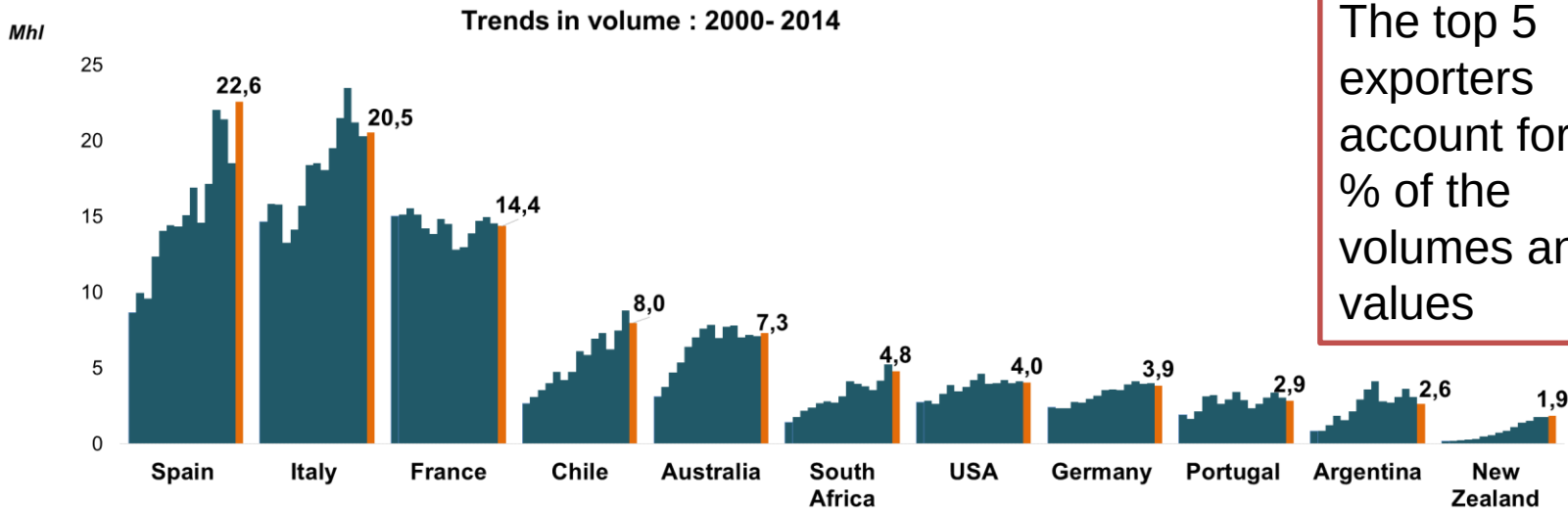




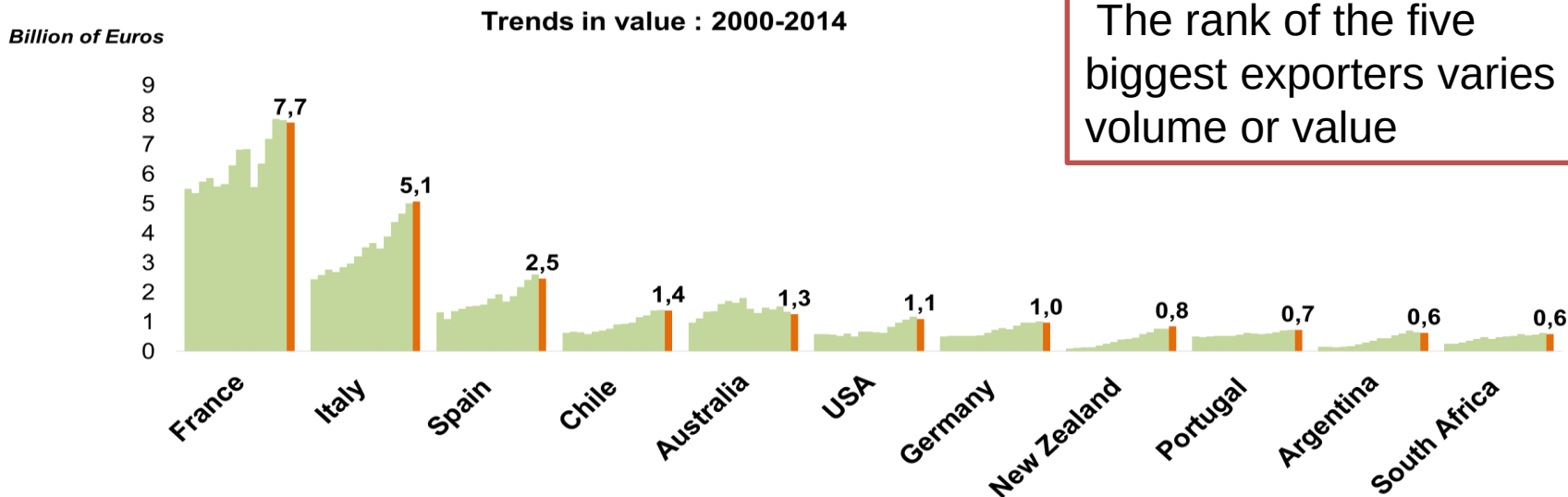
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Top world Exporters

Top world exporters



The top 5 exporters account for 70 % of the volumes and the values



The rank of the five biggest exporters varies in volume or value

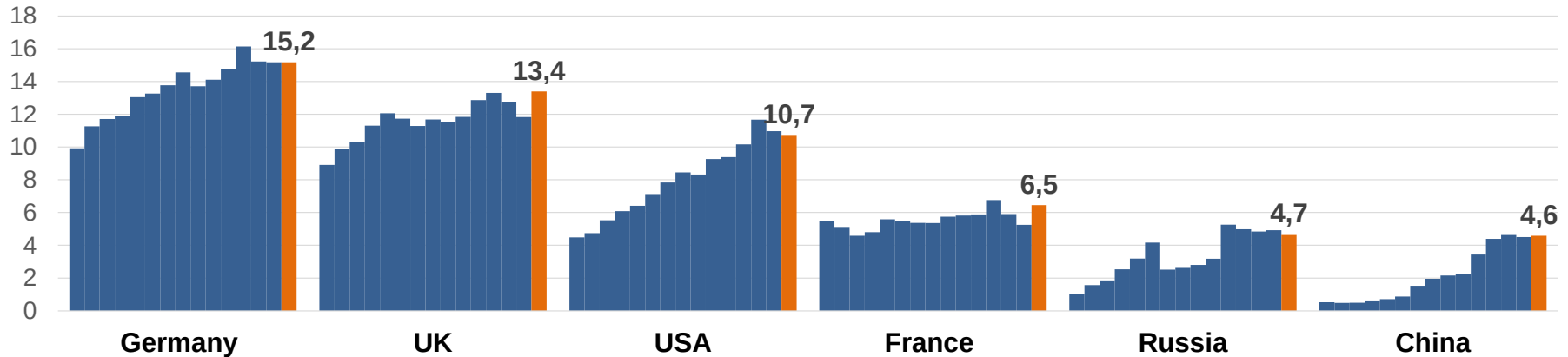


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Top world Importers

Mhl

Trends imports volume: 2000- 2014

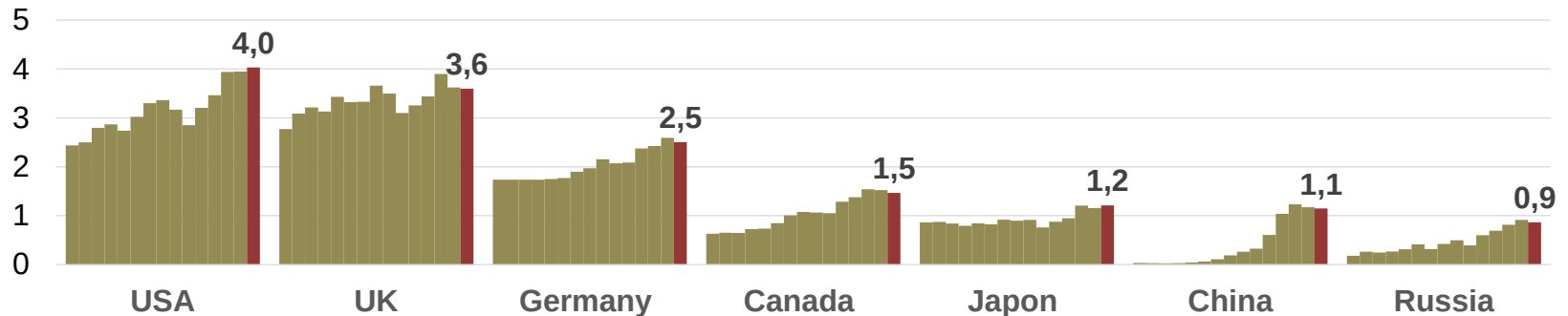


6 countries account for more than 50% of total imports:

- Germany is stagnating, but still dominates the market in volume
- USA keeps increasing his imports, both in volume and value

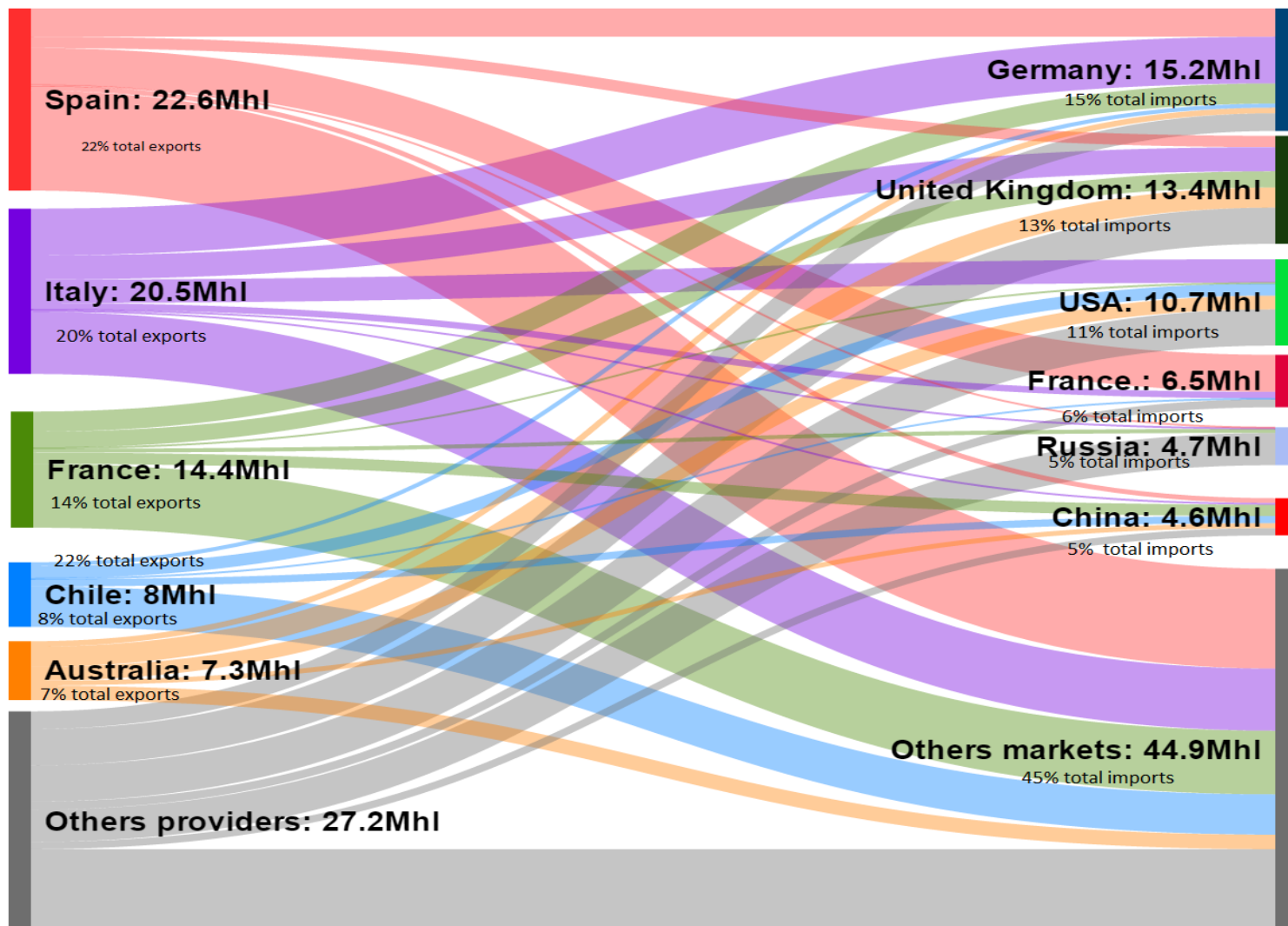
Billion of Euros

Trends imports value: 2000-2014



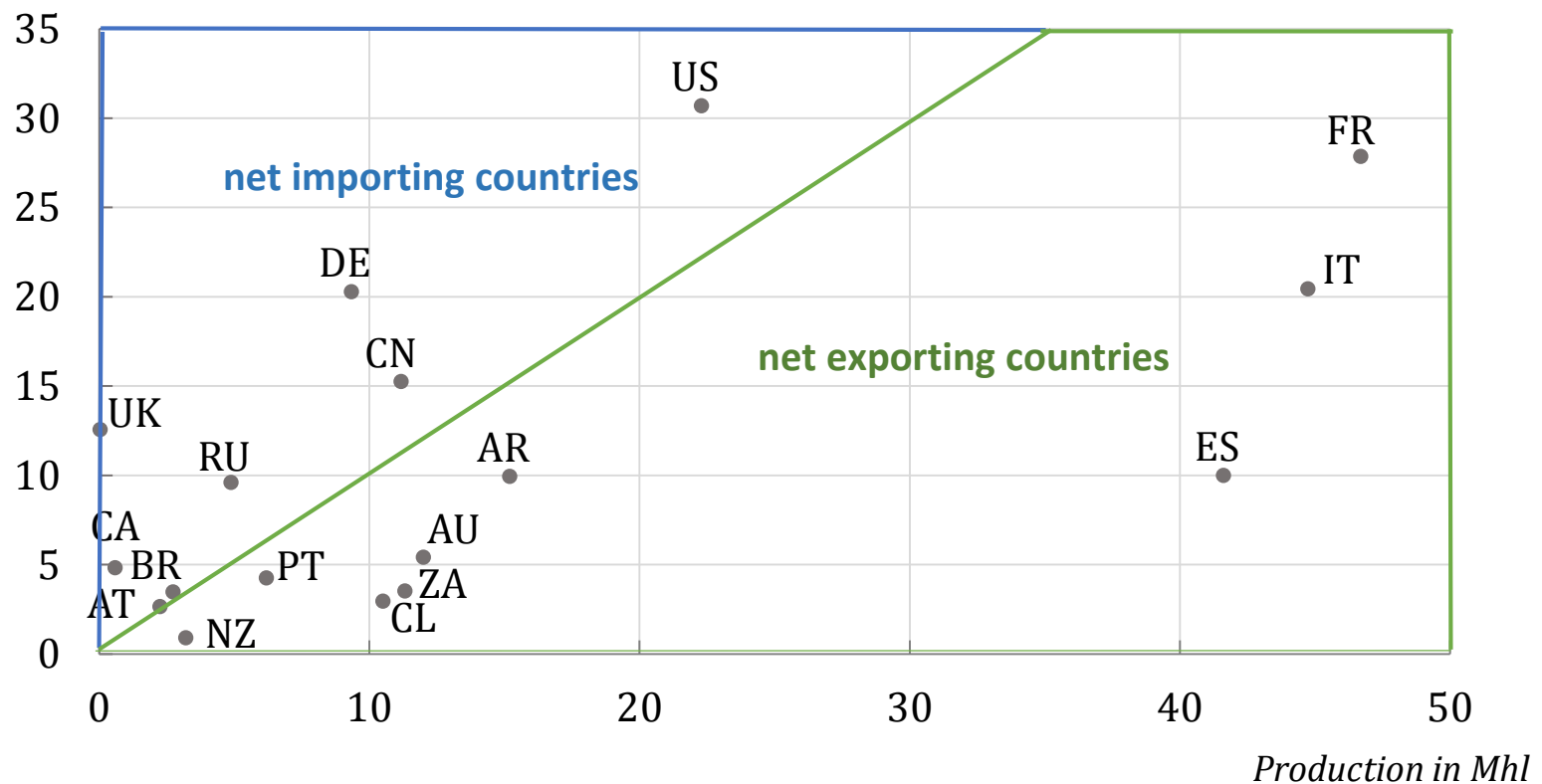
Trade flows in volume: 2014

presentation of the 5 largest exporters and importers



Internal market coverage ratio

Consumption in Mhl





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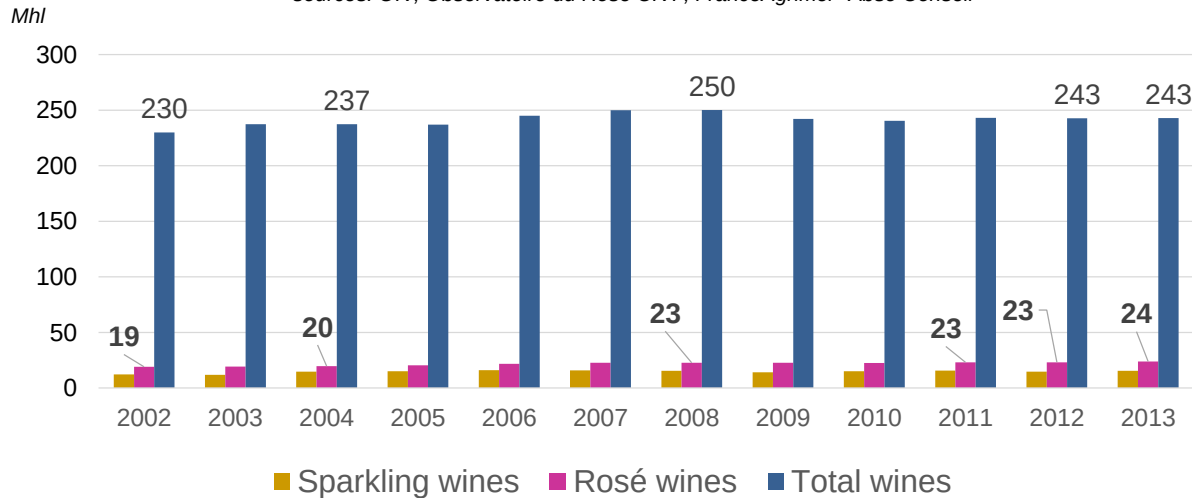
2015 thematic report:

The rosé wines market

Consumption of rosé wine

Evolution wine consumption

sources: OIV, Observatoire du Rosé CIVP, FranceAgrimer - Abso Conseil

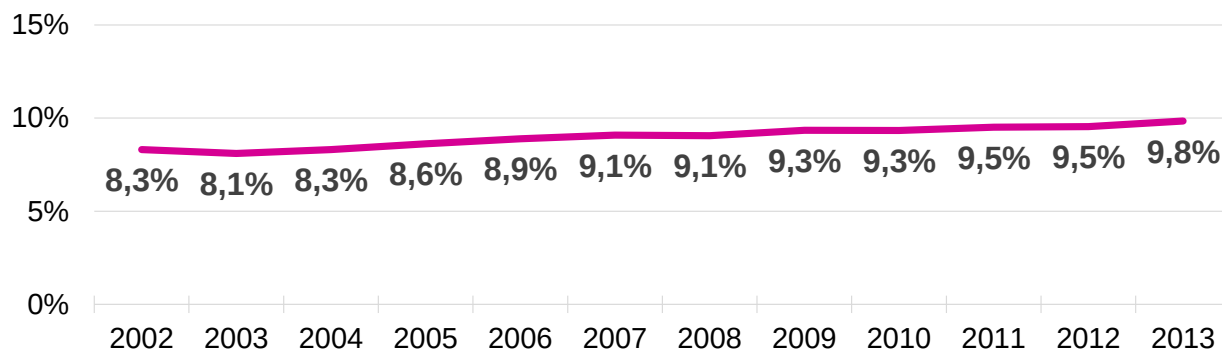


24 Mhl in 2013

World total wine consumption has increased by 6% in the last 10 years...**rosé wine** recorded a **25% increase**.

Share of rosé in total wines consumption

Source : OIV, Observatoire du Rosé CIVP / FranceAgrimer - Abso Conseil

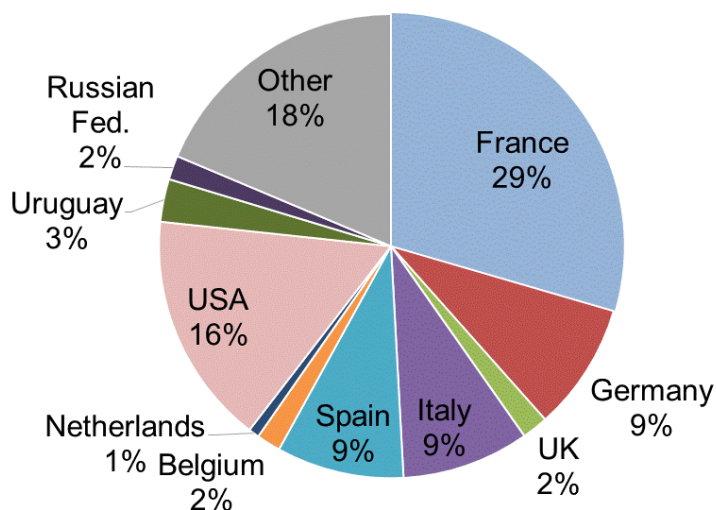


Rosé consumption represents almost **10%** of the total wine consumption

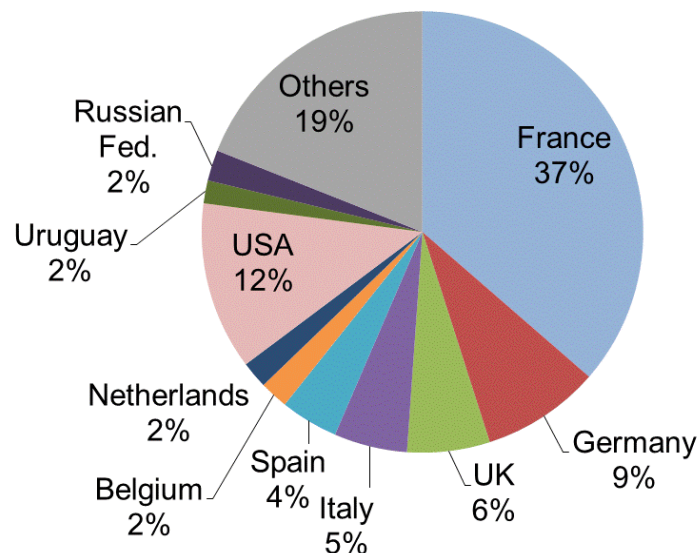
Main consumers of rosé wine

% of total world rosé consumption

2002



2013



Source : OIV, Observatoire du Rosé CIVP / FranceAgrimer - Abso Conseil

- **Europeans are the main consumers of rosé:** France represents one-third of the world rosé consumption.
- USA, Italy, Spain and Portugal are the only countries with decreasing consumption
- Although EU countries are still the leaders in this market segment, **rosé wine consumption is on the rise in the rest of the world**

Thank you for your attention

Vielen Dank für Ihre Aufmerksamkeit

Grazie per la Loro attenzione

Gracias por su atención

Merci de votre attention