



World Wine Production Outlook

OIV First Estimates

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International Organisation of Vine and Wine
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OIV



In 2021 extremely low world wine production volume is expected, at a level similar to 2017. This would be the third consecutive year where the global production level is below average.

Key Facts

- Low production volume anticipated in the EU, notably in Italy, Spain, and France, which together lost about 22 mhl with respect to 2020 due to late spring frost and overall unfavourable climatic conditions.
- The only large EU wine producing countries that recorded harvests bigger than 2020 are Germany, Portugal, Romania and Hungary.
- First harvest forecasts in the USA indicate production volumes slightly above those of 2020.
- Very positive year for Southern Hemisphere vineyards where relatively favourable climatic conditions lead to record high production levels in countries of South America, South Africa and Australia, with New Zealand being the only exception.

Abbreviations:

mhl: millions of hectolitres

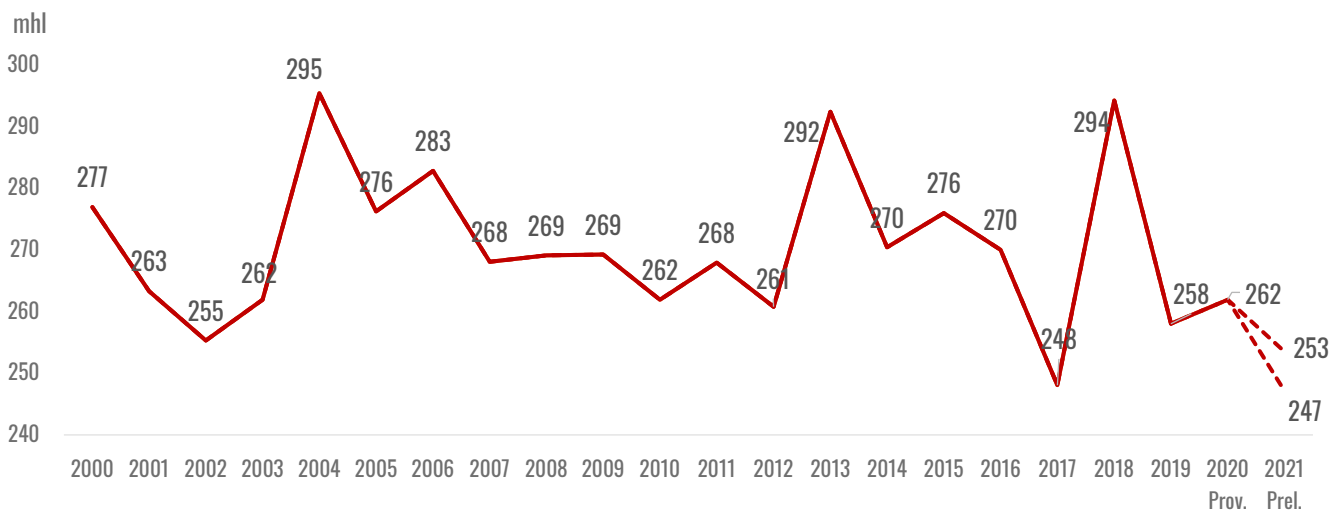


World production

Based on the information collected on 28 countries, which represent 85% of the world production in 2020, **2021 world wine production (excluding juices and musts) is estimated between 247.1 and 253.5 mhl, with a mid-range estimate at 250.3 mhl.** The 2021 wine production can be considered extremely low, only slightly above the historically small production of 2017. This year's expected volume seems to have fallen by 4% compared to 2020 (which was already below- average) and is 7% lower than its 20-year average.

This is the result of unfavourable climatic conditions that severely impacted the major wine-producing countries in Europe this year. The South Hemisphere and the USA seem to be exceptions in this overall negative scenario and tend to balance the fall of volume seen in the EU. This is the third year in a row that world wine production is below average. However, the impact of this downfall for the global wine sector is yet to be evaluated given the current context where the covid-19 pandemic is still generating a relatively high degree of volatility and uncertainty.

Figure 1. World wine production volume (excluding juices and musts), 2000-2021





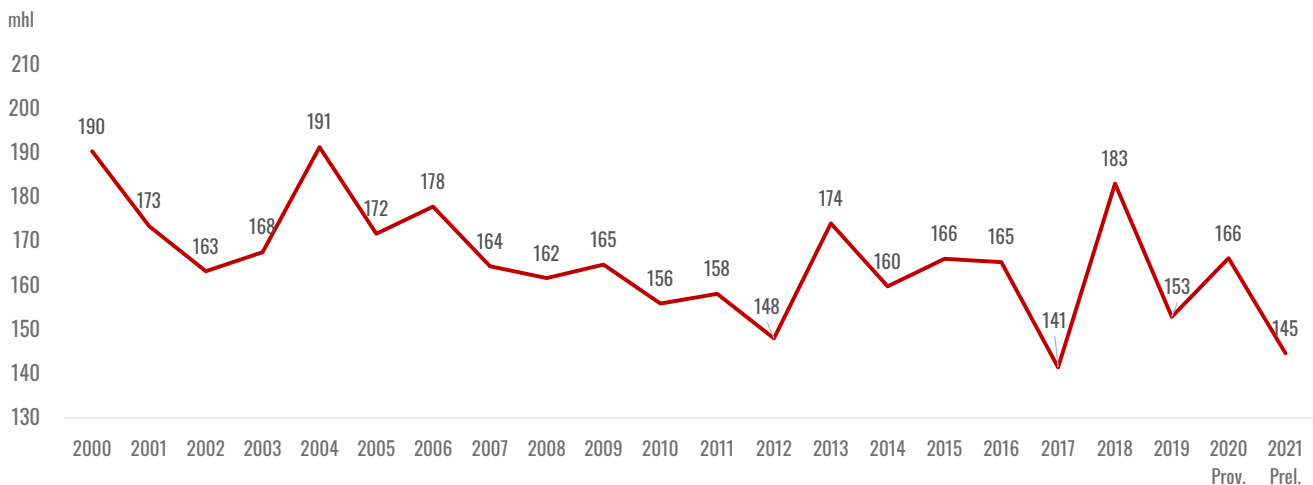
Northern hemisphere

European Union

In the **European Union** (EU), weather conditions did not favour grape growers in 2021 and wine production is estimated at **145 mhl** (excluding juices and musts). This volume shows an annual decrease of 21 mhl (-13%)

compared to 2020. Overall, preliminary estimates for 2021 wine production in EU countries indicate quite a heterogeneous situation, mainly due to different weather conditions throughout the year.

Figure 2. Wine production in the EU27 (excluding juices and musts), 2000-2021



Year 2021 proved to be unfortunate for wine production in the three largest EU producing countries – Italy, Spain and France, which together account for 45% of the world and 79% of the EU wine production – mainly due to the late frosts at the beginning of April. **Italy**, still ranking first at **44.5 mhl**, estimates a drop of 9% in its 2021 wine production compared to 2020 as well as its last-five-year average. **Spain** is the 2nd largest wine producer in the world in 2021 and estimates to produce **35.0 mhl**. This level, however, is expected to be 14% lower compared to 2020 and 9% lower than its five-year average. **France** bore the hardest brunt of a disastrous vintage with severe frost in April, followed by summer rain, hailstorms, and mildew. Consequently, it foresees a production level of **34.2 mhl**, representing a drop of 27% compared to 2020.

Other EU countries that performed negatively with respect to 2020, are **Austria** (**2.3 mhl**, -4% /2020) and **Greece** (**1.7 mhl**, -26% /2020). Moreover, **Croatia** is estimated to register approximately **0.7 mhl**, with a 13% drop compared to 2020. **Slovenia** (**0.5 mhl**, -26%/2020) and **Slovakia** (**0.3 mhl**, -2%/2020) also seem to join the group of countries that saw a fall in their wine production levels.

On the other hand, several countries within the EU expect a positive growth with respect to last year. For example **Germany**, the fourth largest European wine producer, has an estimated production volume of **8.8 mhl** (+4%/2020), notwithstanding the late frost episode that heavily affected some of its neighbouring countries. **Portugal**, with **6.5 mhl**, is expected to record a wine production volume slightly above its 2020 level (+1%). Another large producer, **Romania**, whose harvests have been subject to very high volatility in the recent years, anticipates a surge in wine production in 2021, with **5.3 mhl** (+37%/2020), a level 29% above its last five-year average. **Hungary's** estimated wine production is **3.1 mhl** in 2021, a level 6% above 2020 and 4% higher than its five-year average. **Bulgaria**, with a production level of **0.9 mhl** is 7% higher compared to last year, but 15% lower than its last five-year-average. Lastly, **Czech Republic** expects a wine production of **0.6 mhl**, a level 2% higher than 2020 and in line with its average.

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

<i>Unit: mhl</i>	2016	2017	2018	2019	Prov. 2020	Prel. 2021	21/20 Var.	21/20 Var. (%)
Italy	50.9	42.5	54.8	47.5	49.1	44.5	-4.5	-9%
Spain	39.7	32.5	44.9	33.7	40.7	35.0	-5.7	-14%
France	45.4	36.4	49.2	42.2	46.7	34.2	-12.4	-27%
Germany	9.0	7.5	10.3	8.2	8.4	8.8	0.4	4%
Portugal	6.0	6.7	6.1	6.5	6.4	6.5	0.1	1%
Romania	3.3	4.3	5.1	3.8	3.8	5.3	1.4	37%
Hungary	2.8	2.9	3.6	2.7	2.9	3.1	0.2	6%
Austria	2.0	2.5	2.8	2.5	2.4	2.3	-0.1	-4%
Greece	2.5	2.6	2.2	2.4	2.3	1.7	-0.6	-26%
Bulgaria	1.2	1.2	1.1	0.9	0.8	0.9	0.1	7%
Croatia	0.8	0.7	1.0	0.7	0.8	0.7	-0.1	-13%
Czech Rep.	0.6	0.6	0.7	0.5	0.6	0.6	0.0	2%
Slovenia	0.7	0.6	0.9	0.8	0.7	0.5	-0.2	-26%
Slovakia	0.3	0.3	0.4	0.3	0.4	0.3	0.0	-2%
Luxembourg	0.1	0.1	0.1	0.1	0.1	0.1	0.0	13%
Cyprus	0.1	0.1	0.1	0.1	0.1	0.1	0.0	-26%
Malta	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-8%
EU27	165	141	183	153	166	145	-22	-13%

Outside EU

In the **USA**, the preliminary estimate for 2021 wine production is **24.1 mhl**. This figure is 6% higher compared to last year, which was characterized by a relatively low harvest due to wildfires and smoke taint. However, the production is expected to be 3% lower than its five-year average, which can partially be attributed to drought-like conditions in summer in certain wine regions.

At this time of the year, data on grapes harvest in **China** is not available. However, wine production is likely to continue the contraction that started in 2016 for structural reasons outlined in previous OIV reports on the state of the vitivinicultural sector¹.

¹ <https://www.oiv.int/en/technical-standards-and-documents/statistical-analysis>



In the Eastern European countries, the scenario is overall quite positive. **Russia's** 2021 wine production, estimated at **4.5 mhl**, is marginally higher than last year (+2%/2020) but 2% below its five-year-average. Wine production in **Georgia** is estimated to increase by 22% compared to the already large production of 2020, with a record-high level of **2.2 mhl**, due to a high grape yield this year. In **Moldova**, despite the unfavourable weather conditions such as late frost and heavy rains, 2021 wine production is estimated at **1.1 mhl**, marking an increase of approximately 20% compared to a low 2020 volume

which was impacted by a drought.

Wine production volume in **Switzerland** continues to decline in 2021, due to bad weather - notably frost in April - followed by hail and then mildew hitting the crops in midsummer, thereby recording **0.8 mhl**, the lowest volume in 20 years. Swiss wine production volume is expected to be 10% lower compared to 2020 and 22% lower than the average observed over the last five-year period.

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

<i>Unit: mhl</i>	2016	2017	2018	2019	Prov. 2020	Prel. 2021	21/20 Var.	21/20 Var. (%)
USA*	24.9	24.5	26.1	25.6	22.8	24.1	1.3	6%
China**	13.2	11.6	9.3	7.8	6.6	NA	NA	NA
Russia	5.2	4.5	4.3	4.6	4.4	4.5	0.1	2%
Georgia	0.9	1.0	1.7	1.8	1.8	2.2	0.4	22%
Moldova	1.5	1.8	1.9	1.5	0.9	1.1	0.2	20%
Switzerland	1.1	0.8	1.1	1.0	0.8	0.8	-0.1	-10%
Ukraine	1.2	1.0	1.0	1.0	0.7	NA	NA	NA

* OIV estimate based on USDA harvest data

** OIV estimate based on China NBS and FAO

NA: not available

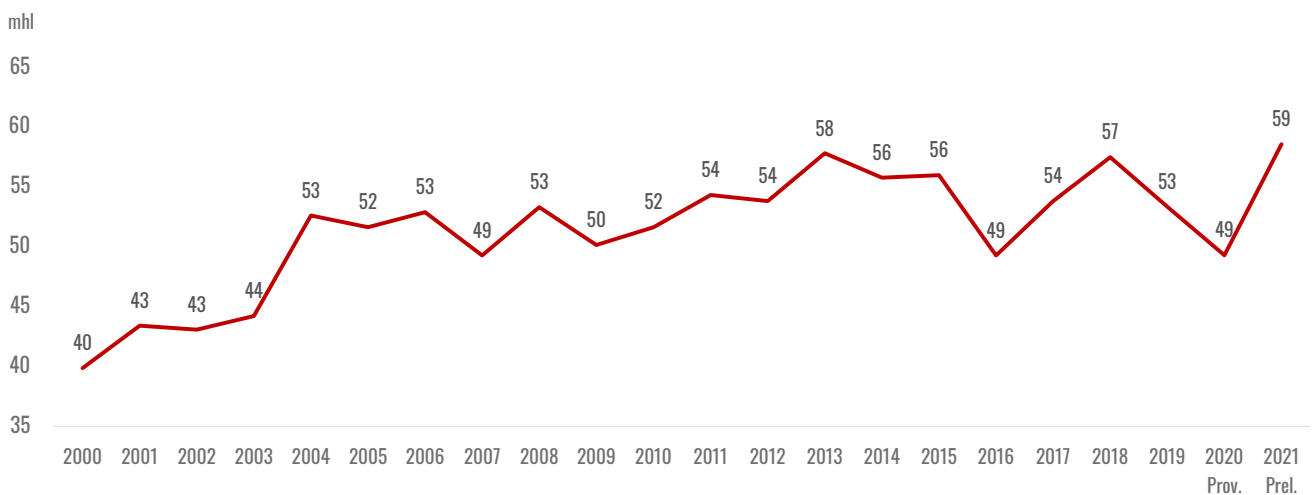


Southern Hemisphere

In the **Southern Hemisphere**, where harvests end in the first trimester of 2021, preliminary figures on wine production tend to be more accurate and reliable in this period of the year. After a strong decline in wine production last year caused by unfavourable climatic

conditions, 2021 has witnessed a sharp increase among all major producing countries. The wine production estimate for the Southern Hemisphere in 2021 is a record-high **59 mhl**, +19% compared to 2020

Figure 3. Wine production in the Southern Hemisphere (excluding juices and musts), 2000-2021



South American countries have registered steep increases in the production levels with respect to 2020. The lack of severe weather conditions this year, usually caused by El Nino seems to have contributed to successful harvests and high wine production levels in 2021. **Chile** is the largest producer of the region in 2021, with wine production peaking at **13.4 mhl**, the highest volume recorded in 20 years, with a 30% increase compared to its 2020 level. In 2021, **Argentina's** wine production has risen significantly to **12.5 mhl** (+16%/2020) after a very low production registered last year. **Brazil** has a high estimated wine production volume of **3.6mhl** in 2021. This is Brazil's largest production volume since 2008, recording a +60% with respect to the last year and +46% compared to its five-year average.

In **South Africa**, wine production in 2021 is estimated at **10.6 mhl**, which marks an increase of 2% in production

compared to 2020. This is the third consecutive year of continuous growth after a prolonged period of drought which started in 2016.

In Oceania, **Australia** registered its highest harvest since 2006, shooting its wine production level in 2021 up to **14.2 mhl**, (+30% compared to 2020 and +14% with respect to its last five-year average). A combination of mild temperatures, low disease pressure and favourable harvest conditions have accrued to this large harvest in Australia, after the previous two vintages being ravaged by drought and fires. **New Zealand** is the only exception in the Southern Hemisphere. After a record-high wine production level last year, New Zealand has produced **2.7 mhl** in 2021 which is 19% lower than last year and 13% below the last-five-year average. This reduced harvest has largely been caused by late frosts in springtime.

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

<i>Unit: mhl</i>	2016	2017	2018	2019	Prov. 2020	Prel. 2021	21/20 Var.	21/20 Var.(%)
Australia	13.1	13.7	12.7	12.0	10.9	14.2	3.3	30%
Chile	10.1	9.5	12.9	11.9	10.3	13.4	3.1	30%
Argentina	9.4	11.8	14.5	13.0	10.8	12.5	1.7	16%
South Africa	10.5	10.8	9.5	9.7	10.4	10.6	0.2	2%
Brazil	1.3	3.6	3.1	2.2	2.3	3.6	1.3	60%
New-Zealand	3.1	2.9	3.0	3.0	3.3	2.7	-0.6	-19%
Uruguay	0.8	0.8	0.7	0.6	0.7	0.7	0.1	8%
Southern Hemisphere	49	54	57	53	49	59	9.3	19%



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 47 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.

*Abbreviations:

mhl: millions of hectolitres

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