

OIV 2023 ACTIVITY REPORT

OIV  **100**





OIV 100

International Year of Vine and Wine 1924 • 2024



International Organisation of Vine and Wine
Intergovernmental Organisation
Created on 29 November 1924 • Refounded on 3 April 2001

international organisation of vine and wine

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IN MEMORIAM: PAU
ROCA BY LUIGI MOIO,
OIV PRESIDENT

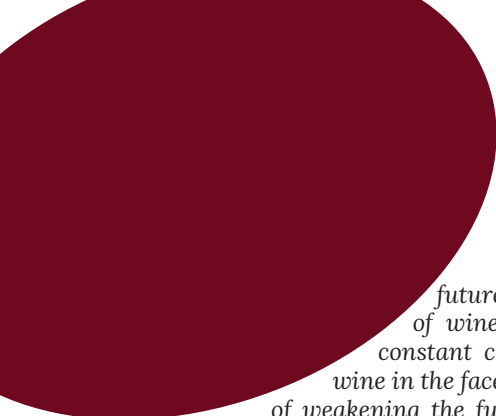
The world of wine mourned in 2023 the passing of the OIV Director General Pau Roca. The sector lost a unique figure who left his mark on the recent history of the OIV, the world's leading scientific organisation for the entire wine sector.

He was a cultured, refined man and an extraordinary innovator. During the five years of his mandate as Director General of the organisation, which he masterfully led and which was due to end at the end of this year, he put his lucid intelligence at the service of world wine, working and fighting for a substantial renewal of the OIV which would give it a special place in the history of this prestigious intergovernmental organisation.

Thanks to his infinite desire to think big, his formidable intuition, his tenacity, his generosity, his altruism and his determination, the OIV has been completely revamped. We owe to him the development of the digitisation of the wine sector and organisation, the renewal and complete internationalisation of the OIV's operational structure, the strengthening of links with other intergovernmental organisations around the world and the expansion of the OIV's member countries to the current 50.

Pau also played a decisive role in the move to Dijon. Although aware of the radical upheaval that such a choice could entail for the OIV, he pursued his idea, often against the tide, but with great determination right to the end, to guarantee a physical identity and a solid future for the organisation which, in 2024, will enter its second century of activity. It is precisely the OIV's centenary celebrations that he has always supported with great enthusiasm, taking care to give the necessary solemnity to this extraordinary event, which the OIV deserves for its prestige and its long scientific and diplomatic history.

For me, and I say this with pride and immense gratitude, he has been a precious friend. I had the great privilege of sharing two very intense years with him, during which so many dreams for the OIV were realised. The memories are many and intense, as are the fascinating discussions about wine and its



future. We often talked about the universality of wine and its place in future society. His constant concern was the risk of delegitimising wine in the face of brutal changes in global society and of weakening the fundamental link between wine and its territories of origin.

We should always remember that the main mission of the OIV, since its creation on 29 November 1924, has been to protect the integrity of wine and preserve its unique link with the land. An objective that we must never lose sight of, even in the light of the alarming concerns caused by global warming and changing perceptions of alcoholic beverages, in order to protect the cultural space that this extraordinary beverage has occupied in society for thousands of years.

Through his total dedication and profound reflections, you can sense that Pau always had the OIV in his heart, right up to his last breath. Indeed, despite his fatigue and the physical constraints of his illness, he insisted on making his last trip to Dijon, where the OIV is headquartered.

Perhaps a sign of hope that your work will continue towards an ever greater development of the International Organisation of Vine and Wine in the exclusive interest of an ever greater and more widespread affirmation of wine and its uniqueness.

Dearest Pau, the entire large family of the OIV and all the friends of world wine who were fortunate enough to know you will always remember you with admiration and edifying example.

I am left with the bitterness of not having had the opportunity to have you present at the OIV centenary celebrations and at the inauguration of the new headquarters.

I will always keep in my heart your friendliness, your extraordinary enthusiasm and your genuine friendship.

My affectionate thoughts are with his wife and three children.

Luigi Moio





PRESENTATION
BY PAU ROCA,
OIV DIRECTOR GENERAL

Dear friends of the Vine and Wine world,

We conclude 2023 and, with it, my five years mandate leading the OIV Secretariat. All along this year, I have worked to fulfil the expectations and the objectives fixed by the Member States in view of the important celebration of the first one hundred years of the organisation. The OIV is set to be the world's scientific and technical reference of the sector and I am proud to have extensively contributed to that objective through the expansion of its members, its influence, and its capacity.

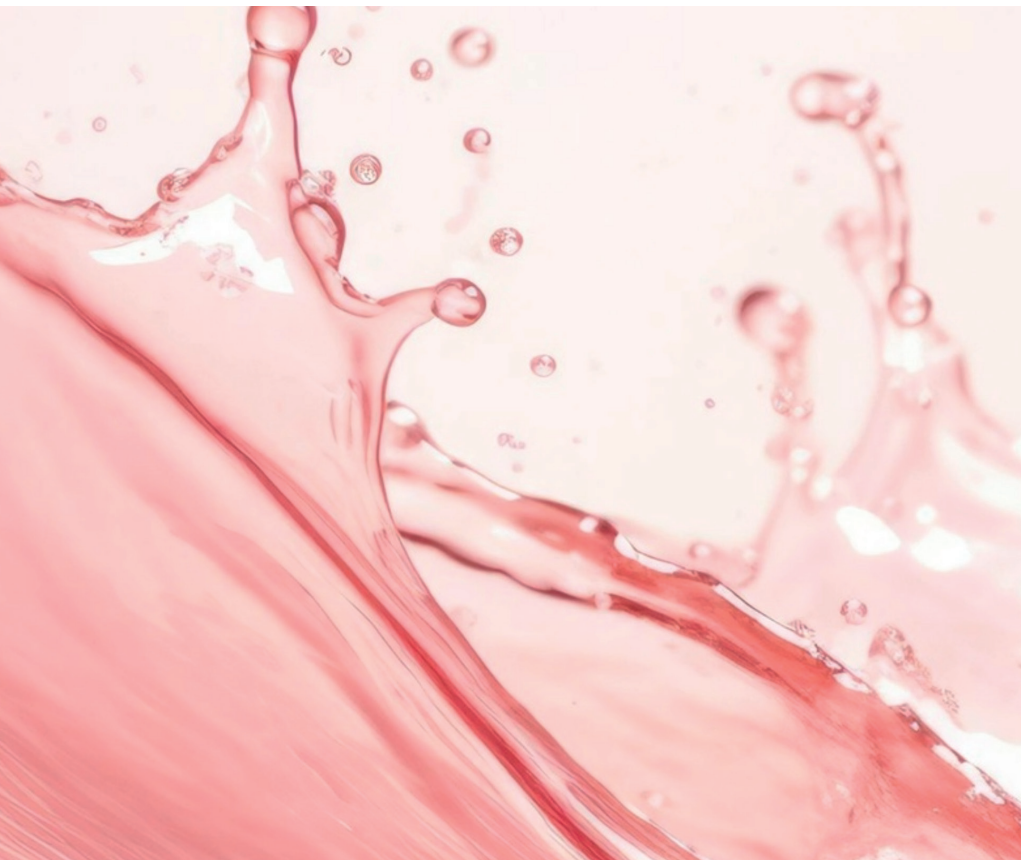
In 2023 the OIV welcomed its 50th Member State with the accession of Albania (following the United Kingdom in 2021 and Ukraine in 2022). We also signed new agreements for Scientific Cooperation with other Intergovernmental Organisations: a MoU (Memorandum of Understanding) with the CIHEAM (International Center for Advanced Mediterranean Agronomic Studies), a letter of intent with the FAO (Food and Agriculture Organization of the United Nations) Plant Protection Treaty and the EPPO (European and Mediterranean Plant Protection Organization); and the membership to the IO Partnership of the OECD (The Organisation for Economic Co-operation and Development). Finally, this year also saw the recognition of the OIV Code of Oenological Practices for Wine Additives by the Codex Alimentarius, a sound achievement as world's scientific reference for the sector.

This last year also saw the expansion of our reach in strengthening bonds with other international organisations such as the WTO (World Trade Organization) with whom we organised a Forum to discuss and identify the impact of non-tariff measures on the vine and wine sector with the objective of creating a joint plan of action.

I finish my mandate in the new organisation's headquarters in Dijon, a city that in the last year showed largely its capacity to host international gatherings at the highest level and will do so in 2024, organising the 45th World Congress of Vine and Wine. A city which embodies the future of Europe's green cities, decentralised and on a human scale.

It has been my profound honour to serve the Member States as OIV Director General and I wish my successor the best of luck and strength to drive the organisation to a new centenary.

Pau Roca † 1958-2023



WHO and FAO recognise OIV competence in wine additives

The 46th Codex Alimentarius Commission recognised in November the OIV International Code of Oenological Practices as reference for wine additives. The members of the CAC adopted by consensus the recommendations of the OIV as reference for wine additives (without ADI) after the interruption of discussions on this subject in 2017 and add 10 additives to the category Grape wines.

Previously, in March, the Codex Committee on Food Additives (CCFA) had already recognised the OIV code. The members of the CCFA adopted the recommendations for wine additives stipulating that the maximum level of additives in grape wine set as Good Manufacturing Practice must not result in:

- The modification of the natural and essential characteristics of the wine and
- Substantial change in the composition of the wine. Some Codex Members further specify the use to be consistent with the International Code of Oenological Practices of the OIV.
- The decision followed the proposal by the delegation of Chile to reopen discussions on the issue of additives in wine in 2021, the members of the CCFA had to express their position on a proposed note referring to the recommendations of the OIV.

This note, which results from a consensus between Chile, the USA and the European Union, was presented to facilitate discussions and advance the subject of the use of food additives in wine during the 53rd session of the CCFA. This recognition of the OIV by the members of the CCFA puts an end to discussions that have been underway for nearly 10 years and allows the adoption of several additives which will complete the GSFA for grape wine category.



Jean-Claude Ruf, the OIV Scientific Director, during the 46th Codex Alimentarius Commission




Albania becomes the 50th OIV Member State

On August 16th, Albania became the 50th OIV Member State. Winemaking in the territory of Albania dates more than 2000 years back, with the records of Illyrians cultivating grapes and producing wine. This tradition has continued throughout all historic timelines, during the Roman and Byzantine Empire, during the Ottoman rule and in modern times during World War II and the communist regime, with its difficulties and successes, leading to this day.

The last thirty years, the vine and wine sector in Albania has been slowly but steadily on the rise. The surface of planted vines has grown from 2776 ha in 2010 to 7442.3 ha in 2021 out of which 5954.8 ha is for wine and 1488 ha for table grapes.

Several wineries grew from small-scale production in veritable wine making establishments that are now able to guarantee not only the quantity but also the quality of the wine, bringing excellence in a bottle for wine lovers. There are now 70 wineries registered in Albania out of which more than 20 are large wineries.

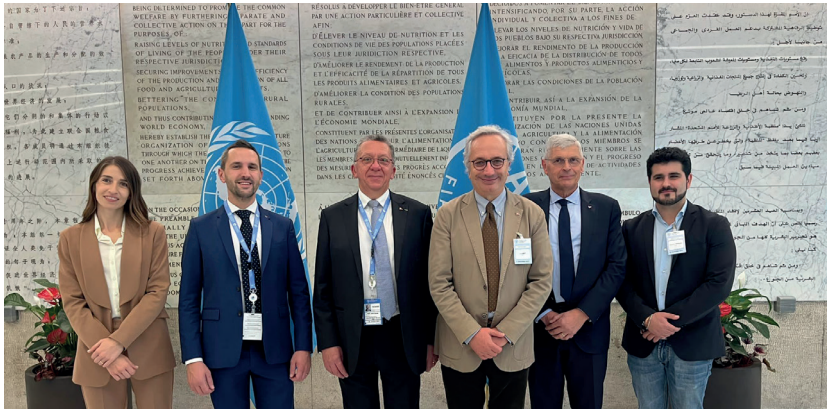
The Ministry of Agriculture and Rural Development of Albania has taken several steps to support the sector, by including viticulture and wine production in the National Support Scheme. Multiple steps have also been taken to align the law and provisions with those of the European Union, which culminated with the approval in parliament of a new law for viticulture and wine, that better regulates the sector and allows our producers to expand their export opportunities.





Valdete Buca, Health Expert from the Ministry of Agriculture and Rural Development receiving the OIV flag by the hands of the OIV President Luigi Moio

Signature of the Letter of Intent with the International Treaty for Conservation of Plant Genetic Resources (ITPGRFA) in Viticulture



From left to right: Roberta Beber, Enrico Battiston, Jean-Claude Ruf, Luigi Moio, Luigi Bavaresco, and Alessandro Boscaini

After many years of discussions and fruitful collaborations between the OIV and the ITPGRFA, both organisations signed a letter of intent to work towards a sustainable future for global agriculture. A strategic and historic step to conserve plant genetic resources promoting biodiversity and aligning with Sustainable Development Goal 15 to “protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss”. The event took place in the framework of the “International Plant Treaty 10th meeting” of the FAO in Rome in November, to which the OIV was invited.

Key Initiatives:

This new collaboration will encompass a broad spectrum of activities, including:

- Capacity Building: Encouraging programmes for the development of skills necessary for advanced conservation of plant genetic resources.
- Knowledge Exchange: Actively promoting the exchange of information relevant to the viticulture sector.

- **Adoption of International Standards:** Advocating for the use of internationally agreed-upon data standards for the documentation of plant genetic resources.
- **Resource Provision and Funding:** Ensuring necessary resources to support collaborative activities, as well as developing financial initiatives for the progress of shared goals, including those related to Sustainable Development Goal 15.

The signing ceremony was preceded by a series of presentations that delved into the rich history of grapes. The sessions covered a spectrum, ranging from the conservation of ancient grapevine germplasm to the innovative development of new varieties resistant to diseases. Additionally, emphasis was placed on MASI's unwavering commitment to the preservation of bio-viticultural heritage. Among those making presentations were Jean-Claude Ruf, Scientific Director of the OIV; Luigi Bavaresco, Secretary of the OIV Genetic group of Experts; Alessandro Boscaini, the 8th generation of the Boscaini family and owner of MASI Agricola S.p.a.; and Roberta Beber, Agronomist of the Technical Group at MASI Agricola. Enrico Battiston, OIV Viticulture Head of Unit, also took part in the event, which closed with a wine tasting, featuring wines produced by the Italian MASI vineyard.

MoU CIHEAM

The OIV and the International Centre for Advanced Mediterranean Agronomic Studies have been collaborating since 2006 in different fields of mutual interest and they consider that it is necessary to intensify their cooperation to face the new challenges of the agri-food system. This collaboration recently resulted in the joint implementation of a scientific session at the COP 27 on the resilience of viticulture to climate change in the Mediterranean.

The cultivation of the vine, both to produce grapes for winemaking and for fresh consumption, is carried out mainly in countries of the world with a Mediterranean climate, beyond the countries bordering the Mediterranean Sea.

The OIV and the CIHEAM will organise in the first week of July 2024 a one-week course in Zaragoza, Spain, dedicated to the "Sustainable water and soil management for resilient viticulture."



Placido Plaza, CIHEAM Secretary General, and Pau Roca, OIV Director General signing the MoU

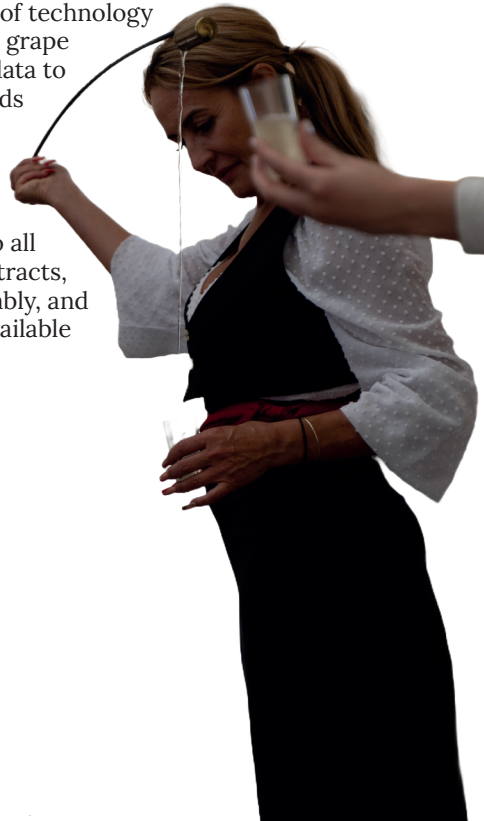


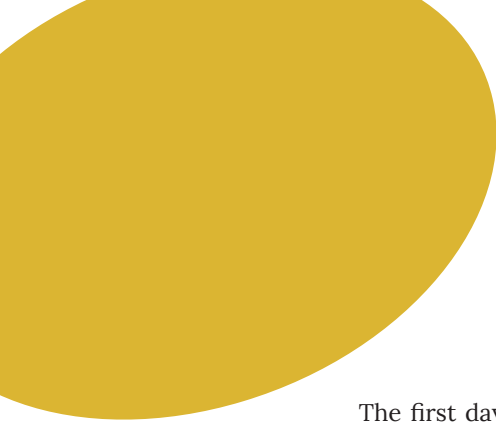


44th World Congress of Vine and Wine in Cadiz/Jerez

The 44th World Congress of Vine and Wine was celebrated from the 5th to the 9th of June in Jerez de la Frontera, Cadiz, Spain under the theme: “Viticulture and information technologies”. After 1929, 1951, 1973, 1992 and 2006, this was the sixth time that the Kingdom of Spain hosted the world vine and wine community in almost a century. Boasting the world’s largest vineyard area and with a winemaking tradition spanning millennia, Spain has undergone a major transformation in recent years, creating many modern wineries producing wines of the highest quality.

The Congress started with an opening ceremony attended by the Spanish Minister of Agriculture, Food and Fishery, Luis Planas, who was also present at the closing General Assembly on Friday. 10 national and international media attended the Congress and the OIV DG, Pau Roca, gave 12 interviews about what was at stake at the event. A vast array of presentations, covering a spectrum of topics, was brought forth by the scientists and experts, extending from the use of technology to tackle climate change, health benefits of the grape and wine components to the benefits of wine data to boost trade. The main headlines pointed towards how the technological development is key to placing the wine sector at the forefront of the industry. This Congress marked a significant shift as it embraced a paperless approach, making use of the OIV App to provide access to all relevant information, including timetables, abstracts, side events, live coverage of the General Assembly, and details about technical visits. The OIV app is available for download on Google Play and Apple Store.

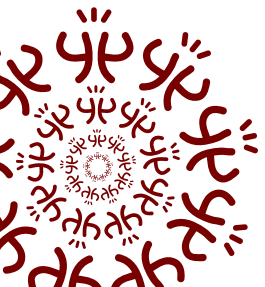




The first day was dedicated to the opening ceremony and to the master conferences in the morning. The evening and second day were consecrated to the different commission meetings. Thursday the 8th June was dedicated to 9 technical visits in the region. Bodegas Gonzalez Byass were chosen to show the wines of Jerez historical heritage. A clear example of the “Cathedral Bodegas” and their complex system for airing and conserving the right temperature in the area was Lustau, one of the oldest wineries in the Marco de Jerez. The William and Humbert visit discovered local varieties and climate adaptation techniques. Participants saw the aging cellars and cooperage workshop at Osborne winery. Finally, the fifth day ended the Congress with the 21st General Assembly.

Congress big numbers

- 798 attendees
- 48 nationalities
- 227 oral communications
- 252 posters
- 49 side events





Inauguration International Year of Vine and Wine

The International Year of Vine and Wine commemorates the first 100 years of the OIV activities. To celebrate the rich history of the organisation, several scientific and cultural events will be held around the world. The celebrations were inaugurated during the 21st General Assembly gathered in Jerez de la Frontera on June 9th, 2023; and will conclude with the inauguration of the new OIV Headquarters, the Hôtel Bouchu d'Esterno, and the celebration of the 45th World Congress of Vine and Wine in Dijon, France in 2024.

All through this first century, the OIV has addressed and overcome the numerous challenges faced by the sector. Today, the organisation continues its work expanding and including new Member States who want to participate in the global debate of vine and wine.

This commemoration salutes the past, celebrates the present and lays the foundation for the next century. A new era defined by digital transformation and climate change will demand the vitivinicultural sector to adapt.

In the modern globalised economy, the OIV works to create consensus between Member States to facilitate international wine production and trade, making it more sustainable. This consensus is achieved through the OIV resolutions that define and recommend the best sustainable production practices. These, in turn, have a direct impact on the final product and its marketing.

The announcement of an international year of vine and wine, besides its high symbolic value, aims to stimulate and promote meetings and debates of a scientific, technical and cultural nature in all wine-producing countries of the world under a general theme: The vine and wine of tomorrow.

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Learn more



21st General Assembly approved 18 resolutions

The 21st General Assembly, held on Friday, June 9th, in the Atalaya Museums of Jerez, elected John Barker from New Zealand as the next OIV Director General and approved 18 resolutions.

The **Viticulture commission** passed two resolutions on general principles and recommendations addressing Pierce's disease in grapevines and the updating of the OIV descriptors for grape vine varieties.

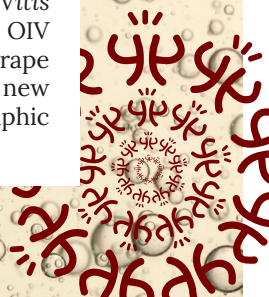
The **Oenology commission** added several oenological practices to the International Code of Oenological Practices of the OIV, published a monograph on fumaric acid. The Methods of Analysis sub-commission included new methods for grape juice.

The **Economy and Law** unit updated several articles of the OIV International Standard for Wine Labelling.

Decisions on viticulture and the environment

- OIV general principles and recommendations addressing Pierce's disease in grapevines (**Resolution OIV-VITI 704-2023**). Considering that the spread of *Xylella fastidiosa* in viticulture is mainly caused by insect vectors of the bacterium commonly found in vitivinicultural regions, the aim of this document is to provide guidelines for the detection, prevention and eradication or containment of organisms and diseases classified as quarantine, such as Pierce's disease. In particular, it is recommended that immediate and effective phytosanitary control measures be implemented to prevent and slow down the spread of Pierce's disease. Similarly, it is recommended that all preventive measures of protection, surveillance, monitoring and inspection be intensified in areas where the disease has not yet been detected.

- Update to the OIV descriptors for grapevine varieties and *Vitis* species (**Resolution OIV-VITI 702-2023**). In this context, the OIV will publish the 3rd edition of the "OIV descriptor list of grape vine varieties and *Vitis* species", which will include a list of new descriptors. This publication provides a reference ampelographic description for a given grapevine variety.





Decisions on oenological practices

Several resolutions regarding new oenological practices will be added to the *International Code of Oenological Practices* of the OIV:

- The treatment of wine using a membrane technology coupled with adsorption on deodorant activated carbon or adsorbent styrene-divinylbenzene beads to reduce volatile phenols (Resolution OIV-OENO 657-2023). The objective of this new practice is to reduce the content of volatile phenols either of microbial origin or of environmental origin, such as compounds produced exogenously by smoke and/or endogenously in the winery environment.
- Metals removal from aged wine vinegars by chelating resins of styrene-divinylbenzene (Resolution OIV-OENO 658-2023). The objective of this practice is to reduce the concentrations of iron and copper in particular, in order to avoid stability problems in aged wine vinegars (aged in barrels for a minimum of two years).

Update to the guidelines for granting and maintaining OIV patronage of international wine and spirituous beverages of vitivincultural origin competitions (Resolution OIV-OENO 671B-2023). This resolution amends the previous guidelines adopted in 2009, in particular by adding an article instructing competition organisers to integrate and comply with the General Data Protection Regulation (GDPR).

Decisions on Specifications for Oenological Products

The following monographs have been added to the *International Oenological Codex*, in particular:

- The monograph on fumaric acid (**Resolution OIV-OENO 690-2023**). Food-grade fumaric acid can be obtained through chemical synthesis or by biosynthesis. It is used for controlling malolactic fermentation in wines under conditions stipulated by regulation. This monograph sets out the various specifications that fumaric acid should meet.

Decisions on Methods of Analysis

During this same session, it was decided that new methods of analysis will be added to the OIV analytical corpus. These include:

- Several microbiological analysis methods for grape juice, concentrated grape juice, reconstituted grape juice and grape nectar. These methods, based on ISO standards, are as follows: i) a horizontal method for the enumeration of coliforms – colony-count technique (**Resolution OIV-OENO 662M-2023**) – this method gives general guidelines for the enumeration of coliforms; ii) a horizontal method for the enumeration of beta-glucuronidase-positive *Escherichia coli* (**Resolution OIV-OENO 662N-2023**) – this method describes two horizontal methods for the enumeration of β -glucuronidase-positive *Escherichia coli*; iii) a horizontal method for the enumeration of coagulase-positive staphylococci (**Resolution OIV-OENO 662O-2023**) – this method refers to the enumeration of coagulase-positive staphylococci by counting the colonies obtained on a solid medium; and iv) a horizontal method for the enumeration of microorganisms (**Resolution OIV-OENO 662P-2023**) – this method consists of two parts: one for colony count by the pour plate technique and another for colony count by the surface plating technique.
- The method of analysis for determining soluble solids in grape juice, reconstituted grape juice, concentrated grape juice and grape nectar (**Resolution OIV-OENO 662F-2023**). The soluble solids content of a sample, estimated from its refractive index, is used to obtain the sugar content.
- Update to the OIV method for multielemental analysis in wine using inductively coupled plasma-mass spectrometry (ICP-MS), by introducing adjustments, particularly regarding sample preparation (**Resolution OIV-OENO 666-2023**). The principle is based on the separation of ions according to the mass-to-charge ratio in a mass spectrometer, and the detection and quantification of the ions using an electron multiplier system.
- Update to the OIV method for the determination of sorbic, benzoic and salicylic acid content in wine using high-performance liquid chromatography, by introducing an annex relating to inter-laboratory validation for sorbic acid (**Resolution OIV-OENO 687-2023**).

Decisions on Economy and Law

● The OIV adopted the updates to several articles of the OIV International Standard for Wine Labelling, in particular:

- Article 3.1.5 “Vintage and harvest year” (**Resolution OIV-ECO 697-2023**).

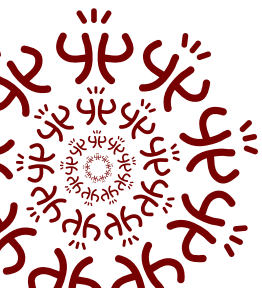
To bear this mention, the wines must be made from at least 85% grapes coming from the year shown. The previous version stipulated that all the grapes had to come from the year in question.

- Article 3.1.7 “The ageing of wine” (**Resolution OIV-ECO 698-2023**). Terms related to the ageing of wine can only be used if a national rule defining ageing conditions exists.

- Article 2.6 “The name and address of the person responsible for pre-packages” (**Resolution OIV-ECO 699-2023**). Information about the name of the person responsible, their address, as well as the place the containers were pre-packaged, and those relating to the pre-packer or the importer should not be capable of creating confusion as to the wine's origin nor to its quality through the evocation of companies or people. Similarly, the address of the person responsible for the pre-package bears the name of the place where this was actually processed or carried out.

- Article 3.1.3 “Name of the viticultural holding” (**Resolution OIV-ECO 700-2023**). A paragraph has been added specifying that the use of a name of a viticultural holding shall not be in conflict with other legitimate intellectual property rights like previously registered geographical indications, appellations of origin or trademarks.

In addition, the General Assembly adopted a resolution formalising the repeal of 376 resolutions analysed by the Codification Steering Committee in charge of the codification process. These resolutions are repealed because they have expired, are obsolete or redundant in relation to the OIV's body of standards (**Resolution OIV-ECO 715-2023**).



John Barker, elected new OIV DG

During the Assembly, doctor John Barker, was elected with 139,4 of the total 142,8 weighed votes. 46 out of 47 eligible Member States voted for him. The new DG starts his mandate in January 2024.

Biography

John Barker is a legal expert with over 25 years experience in the vine and wine sector. He has a long history with the OIV, having attended his first OIV meetings as a researcher in 2000 and starting as a New Zealand expert in 2005. He served as President (2009- 2012) and Vice-President (2012-2014) of the Law and Economy Commission. He was a candidate for the position of Director General in 2018.

Dr Barker has an extensive background in the vine and wine sector both in New Zealand and internationally, specialising in all aspects of wine regulation and international trade. He has worked as Wine Programme Manager for the New Zealand government, and from 2004-2014 as General Manager Advocacy and General Counsel for New Zealand Winegrowers – the national wine sector association. From 2014 to 2023, he owned a specialised legal practice advising

wine and vine sector entities in many countries including New Zealand, Australia, UK, USA, France, Georgia, Moldova, Canada and Singapore.

John Barker was born 7 October 1968 in Auckland, New Zealand. He is married with two children. He holds a bachelor's degree in law and arts from the University of Auckland (1992) and a PhD in Law and Geography (2004). His doctoral thesis - "Different Worlds: Law and the Changing Geographies of Wine in France and New Zealand" – was supported by a partnership between the University of Auckland and INRA-ENESAD at the Université de Bourgogne in Dijon.





Codification

The OIV began the codification process in 2021 aiming at providing access and knowledge of the resolutions.

This process is divided into 3 phases, the first of which started in 2021 and determined the status of the resolutions adopted by the OIV. Phase 2 continued in 2023, with the aim of tracking the OIV positive law. Phase 3 will take place in the coming years and will adopt the OIV Code.

In June 2023, during the General Assembly in Spain the resolution OIV-ECO 715-2023 was adopted which withdraws 376 resolutions according to 3 established criteria: obsolete, out of date and redundant. At the same time, the codification committee continued its analysis and proposed a new draft resolution which proposes the withdrawal of 184 resolutions according to the same criteria.

Secondly and considering the importance of the codification process for the OIV, the codification committee continues its work of reflection, definition and implementation of the phases and terms necessary to carry out this work. It is expected that some of these proposals may be presented during the OIV meetings in April 2024. In addition, the OIV continued to work on making all resolutions available on the new website. New consultation and dissemination formats are already available on the OIV website.





Masi Agricola joined the consortium of companies

The Consortium, whose agreement was signed in 2021 between Viña Concha y Toro (Chile), Moët-Hennessy (France), Sogrape (Portugal), Familia Torres (Spain) and Yalumba Family Winemakers (Australia), welcomed the new member, MASI Agricola (Italy). The 6 companies carry out very important R&D work at the international level, thanks to their research centres. They aim to contribute to promoting and supporting the Organisation's technical and scientific diffusion among the various actors in the vitivinicultural sector.

The companies in the consortium continue to collaborate with each other to identify research areas that are consensually recognised as priorities for the grape and wine sector. In the follow-up, and within the scope of OIV grants, the consortium will:

- Propose research grant subjects
- Advise during the selection process
- When applicable, host grant recipients
- Develop joint communication actions.

New coordination

After three years coordinating the Consortium, Antonio Graça from Sogrape hands the baton to Marc Brevet from Moët Hennessy, the Robert-Jean de Vogüé Research Center R&D Director. The OIV Director General would like to thank Antonio for his work and wishes Marc a lot of success in his new role.

The Vine and Wine World Trade Forum

The OIV organised on October 3rd in Dijon, France, the first edition of the Vine and Wine World Trade Forum (VWWTF), which gathered 170 people from 35 different nationalities. Under the theme of “What future for the international trade of vine and wine products? Between sustainability challenges and non-tariff measures” for this first edition of the VWWTF, the OIV aimed at the creation of a forum of reflection and exchange on global trade dedicated to facilitating commerce in the vitivinicultural sector. Fostering cooperation, sharing knowledge and collaboration among producers, distributing stakeholders and international organisations (IO), the event addressed the major issues and trade challenges for vitivinicultural products.

Multilateralism is the place

Experts from the OIV, the European Commission (EU), Embassies, the World Trade Organisation (WTO), the United Nations Conference on Trade and Development (UNCTAD), the International Trade Centre (ITC), the Wine Origins Alliance, the International Federation of Wines and Spirits (FIVS) and the private sector attended the conference. The forum facilitated the exchanges and gave examples of both tariff and non-tariff measures.

Participants agreed on the importance of fighting against the fragmentation of the sector, climate risks and sustainability in the future of trade. The multilateral trading system is the place for achieving transparency, cooperative dialogue, and the prevention of disputes on regulations adopted for legitimate policy objectives. The opening session was followed by three technical sessions which included presentations and discussions around specific topics on international trade and the vitivinicultural sector:

Session 1: “Non-tariffs measures: barriers or catalyst to the vine and wine trade?”

Session 2: “Sustainability objectives and trade fluidity”

Session 3: “Tools to assess the impact of NTMs and mitigate specific barriers of the vine and wine sector”.

The Forum consecrated the last session to defining an ACTION PLAN for the OIV regarding the issues of trade.







Webinar Labelling

From December 8, wines marketed in the EU –including those imported from third countries – should bear on the label the list of ingredients and the nutritional declaration. The alternative offered by the EU Law, consisting in displaying most of this mandatory information via the physical label and its digital support (e-label with a QR-code). These new rules raise a lot of practical questions in the sector. The OIV held a webinar in collaboration with the International Society for Vine and Wine Law. For one hour, Ignacio Sanchez Recarte, Secretary General of the Comité Européen des Entreprises Vins and the lawyer Rein-Prins answered all the participant's questions about the new law with the moderation of Theodore Georgopoulos, professor of the EU & Food and Law.

**NEW EU
LABELLING
REGULATION
FOR WINES**



OIV Webinar | **17 NOV 2023** | **5 PM CET**  **OIV app**



OIV Master in Wine Management

The 35th Promotion of the OIV Master of Science in Wine Management commenced in September at the temporary headquarters situated in «La Cité Internationale de la Gastronomie et du Vin» in Dijon. From there, students embarked on visits to the Burgundy vineyards and later continued on a global journey to enhance their understanding. The AUIV (International University Association of Wine and Vine Products) establishes the framework for a comprehensive training program across multiple locations in 25 countries engaged in wine production, marketing, and consumption. Collaborating with the Institut Agro Montpellier, the master's program spans 18 months, encompassing 30 modules that delve into specific themes. The curriculum also includes the in-depth study and visits to a designated host region.



International Ampelography course in Chile

The third edition of the course took place from the 4th to 8th of December, and for the first time in South America. Students visited and studied in different regions with both practical and theoretical training.

The country known for its preservation of Carmenère after the phylloxera epidemic was the field to transmit the knowledge about its vine varieties throughout history. Participants learnt from Chilean wine growers and its unusual methods, a far cry from the large-scale production in the South.

As the scientific and technical reference in the world of vine and wine, this new OIV course in ampelography, organised jointly with Consorcio I+D Vinos de Chile and the support of CORFO (Chilean economic development agency), allowed participants to acquire in-depth knowledge in the recognition and understanding of grapevine varieties, helping them to be better prepared for future challenges in the vitivincultural sector (latest trends in genetic resources, climate change and environment societal expectations).





International Organisation
Of Vine And Wine

International Course in Ampelography
4-8 December 2023
Chile

ALEJANDRO FUENTES ESPINOZA
HEAD OF ECONOMY AND LAW UNIT - OIV

ENRICO BATTISTON
HEAD OF VITICULTURE UNIT - OIV



Consorcio I+D



The course was organised through a 5-day length with practical, leading-edge knowledge facilitated by specialists and professors from the most prestigious vine genetic resource centers in Chile, Spain, and France: Thierry Lacombe from the Institut Agro Montpellier-France, Laurent Audeguin: Engineer from the French Institute of Vine and Wine, Gregorio Muñoz: Head of Agrofood Department at IMIDRA (Comunidad de Madrid, Spain) and Yerko Moreno: Professor at the Faculty of Agricultural Sciences at the University of Talca-Chile.



Carmenère,
grape variety very present in Chile. Drawing
by Anne Pieu-sergues Dherbicourt

OIV STATISTICS

Focus: Evolution of the world wine production and consumption by colour

The report prepared by the Statistics Department of the International Organisation of Vine and Wine (OIV), provides an overview of the evolution of the world wine production and consumption by colour over the 2000-2021 period. Those are the main highlights of the study:



Red wine

World - Global red wine supply and demand have significantly decreased in the last twenty years. In 2021 production has declined by 25% since its peak in 2004. The decrease is remarkable also in relative terms: at the beginning of the century, red wines accounted on average for 48% of the total wine production, while in the last few years, the share dropped to 43%.

Production - Negative growth rates over the 2000-2021 period are observed across all major European red wine-producing countries. In particular, it is worth noting the sharp decline in France (which nowadays produces 50% less red wine than at the beginning of the century) and Italy. These declines are only partially compensated by non-European producing countries, such as Chile, Argentina, Australia, the USA, and South Africa, which show positive growth rates in red wine production. Among the top 10 countries with the highest percentage of red wine in their national wine production, 7 are from outside Europe.

Consumption - Demand for red wine in the last twenty years has decreased mainly in large European markets - notably Germany, France, Italy and Spain. These countries have all recorded negative growth rates for red wine since 2000. In contrast, positive growth rates over the last twenty years are recorded in China, the USA, Russia, and Brazil. The top 6 countries by percentage of red wine in their national wine consumption are outside Europe, notably in South America and East Asia.



White wine

World - White wine demand and supply at the global level have expanded since 2000. Production of white wine has increased in 2021 by 13% since its lowest level in 2002, and it has overcome red wine production starting in 2013. At the beginning of the century, white wine accounted on average for 46% of the world total, while in more recent years this share rose to 49%. One of the main driving forces behind this increase is the boom of sparkling wine.

Production - The main countries that contributed to the growth at the world level are Italy (driven by the global success of Prosecco), the USA, South Africa, and Australia. On the contrary, some other large white wine-producing countries such as France and Spain (second and third white wine producers at the world level respectively), have recorded a stable trend since the beginning of the century.

Consumption - The increase in demand for white wine is mostly driven by three important sparkling wine markets: the USA, Germany, and the UK. The rise in consumption in these countries more than compensates for the decline recorded in large wine-consuming countries such as France and Spain.



Rosé wine

World - In the last twenty years, rosé wine has grown significantly in terms of both demand and supply at the world level. Global production has seen an increase of 25% between 2001 and 2021. At the beginning of the century, rosé wines represented between 6 and 7% of the world's production, while in recent years it accounted for more than 8% on average.

Production - The supply of rosé wine is much more concentrated than in the case of wines of other colours, with the top 10 producing countries representing almost 90% of the world total in 2021, and the top 3 accounting for two-thirds. In the case of rosé, it is mostly the Northern Hemisphere countries that lead the growth (France especially), even though countries such as Chile and South Africa have also shown very high growth rates in the last twenty years.

Consumption - As in the case of white wines, the growth of the rosé market can be mainly attributed to an increase in demand in the UK, Germany and the US. France is by far the main market at the world level, representing more than one-third of the global demand.

OIV STATISTICS

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

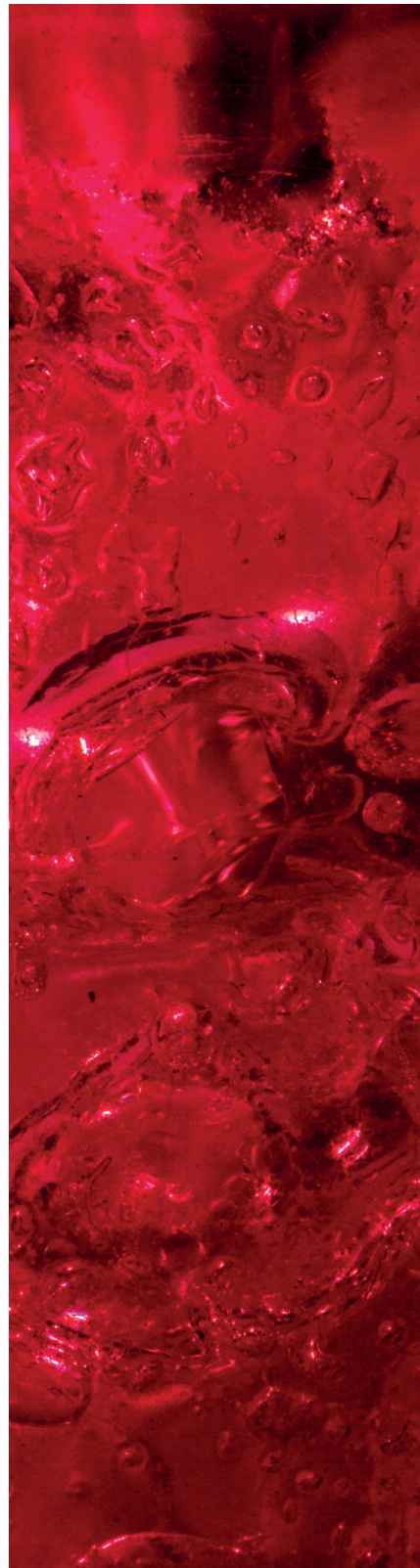
Based on the information collected on twenty-nine countries, which account for 94% of the global production in 2022, world wine production (excluding juices and musts) in 2023 is estimated between 241.7 mhl and 246.6 mhl, with a mid-range estimate at 244.1 mhl. This represents a decrease of 7% compared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

- 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.

This year's figure should be, however, taken with caution, as there are still large countries like China, whose information is not available yet. Also, the high volatility in production volumes observed over the last years at both country and regional levels makes forecasting exercise even more difficult. This would be the smallest production 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.





OIV Awards ceremony 2023

The OIV Awards winners received their diplomas in a ceremony held at the residence of the Serbian embassy in Paris. The Members of the Jury granted 14 Awards, 8 Special Mentions and one Acknowledgment among 76 applications in competition.

The event was led by the OIV President Luigi Moio, the Award Jury President, Azéline Jaboulet-Vercherre, and the Award Jury Scientific Secretary Richard Pfister. Numerous representatives of the Diplomatic Corps, together with the publishing houses of the awarded books, were also present.

Books on competition represented a total of 27 countries (member and non-members of the OIV included), with France and Italy leading the majority of applications.

2024 applicants are invited to fill the form on the OIV website and send the books before February 28th, 2024.

*Consult here the list
of the 2023 OIV winners*







Journeys around vines

Based on the cultural axis of the OIV and according to the Strategic Plan, we pay tribute to the world's viticultural landscapes by undertaking, since January 2022, a Tour of the World of Vines and Wine. Each month, the OIV puts a country in the spotlight and invites viewers on a spectacular journey to discover the history and culture of wine in a new vineyard, across five continents by regarding a 26-minute episode.

The journey shows breathtaking landscapes, centuries-old traditions revealed and always the same observation: the extraordinary fruitfulness of the link between geography and human beings. Each place, with its climate, soils, exposure and the history of its men and women, creates the unique blend that is found in wine.

The broadcasting of the episode is often accompanied by a talk given by some of the country's experts through the OIV App, moderated by the project manager. Each episode invites the viewers to ask questions and to participate to the debate. This cultural event is sometimes celebrated as a meeting gathering producers, diplomats, scientists and curious.

This year we had the pleasure of visiting the vineyards of: Moldova, Argentina, China, Japan, Switzerland, and Spain.







JOHN BARKER WORD,
NEW OIV DG EPILOGUE

In 2024, the OIV will mark 100 years since its creation. This is an historic moment for our organisation. We will celebrate a century of achievements and look forward to the next century and beyond with a programme of international events and publications that culminates in the inauguration of the new siège and a Ministerial Conference, Congress and General Assembly in Dijon next October.

At this time, the OIV will also launch its next 5-year Strategic Plan. The OIV's centenary takes place at a time of change and uncertainty for the vine and wine sector. In this context, the leadership and the opportunities for international cooperation and collaboration that the OIV provides are more valuable than ever.

Working with the members, the OIV will develop its future programme around the most important global issues facing the vine and wine sector: the effects of climate change, the question around wine and society, the evolution of consumption, the rise of the digital economy, and international trade. We will place in the hands of members and the sector the standards, guidance and information they need to help them navigate the future.

We will review the structure and operation of our organisation to ensure that it is aligned with our strategic priorities and with members' expectations. We will continue to expand the influence and reach of the OIV by strengthening relationships with members, non-member countries and other international organisations. And we will communicate to the world about our activities and the technological advances and cultural richness of our sector.

The Strategy of the next 5 years will stand on the foundation of the works that have gone before. The pages of this 2023 Annual Report show a dynamic organisation that is actively addressing the challenges and opportunities of the vine and wine sector, supported by a hard-working Secretariat in conjunction with experts and Members. We owe a debt of gratitude to Director General Roca for his vision and his tireless efforts throughout his term to move the OIV forward and to prepare it for the years to come.

To conclude on a personal note, I am deeply honoured to have been elected OIV Director General. I look forward with great enthusiasm to serving the membership in this capacity, and to bringing my experience, energy and vision to this historic organisation.

John Barker



OIV 100

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