



INTERNATIONAL ORGANISATION OF VINE AND WINE

# STATE OF THE VINE AND WINE SECTOR

OIV Press Conference

John Barker, OIV Director General  
25 April 2024

*OIV*



## **2023 DATA**

**Vineyard Surface Area**

**Wine Production**

**Wine Consumption**

**International Trade in Wine**

## **2024 First Estimates**

**Wine Production in Southern Hemisphere**

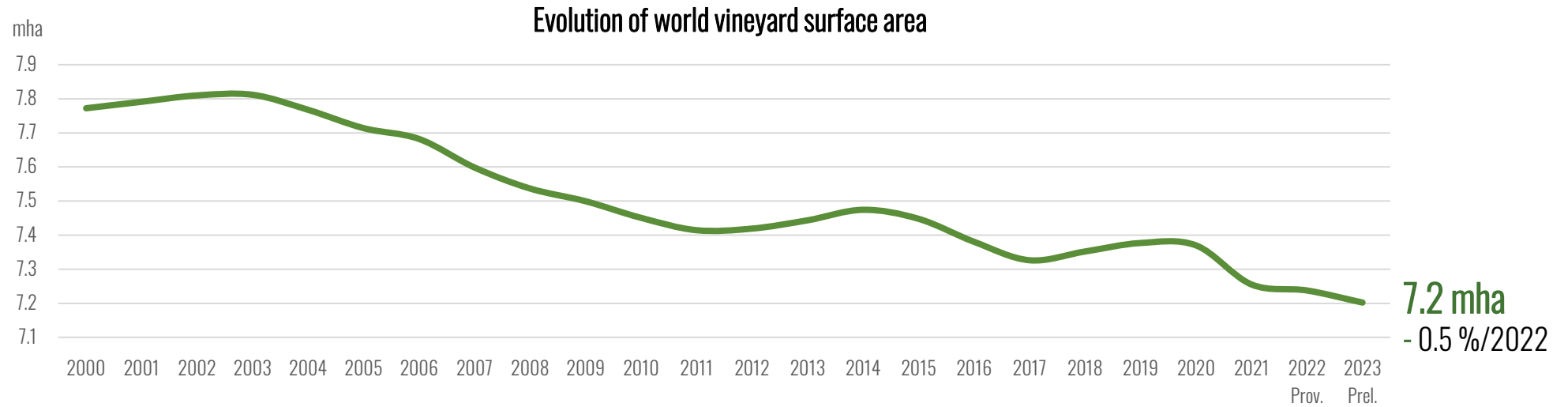
**Challenges & Opportunities:  
Looking Ahead**



# Vineyard Surface Area

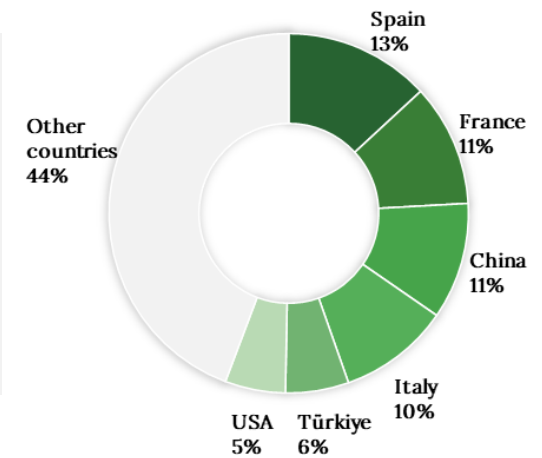


# Vineyard Surface Area



The world's vineyard surface area continued its decline, shrinking by 0.5% from 2022 to 7.2 million hectares. This trend, observed for the third consecutive year, was driven by the removal of vineyards in major vine-growing regions (including all types of grapes) across both hemispheres.

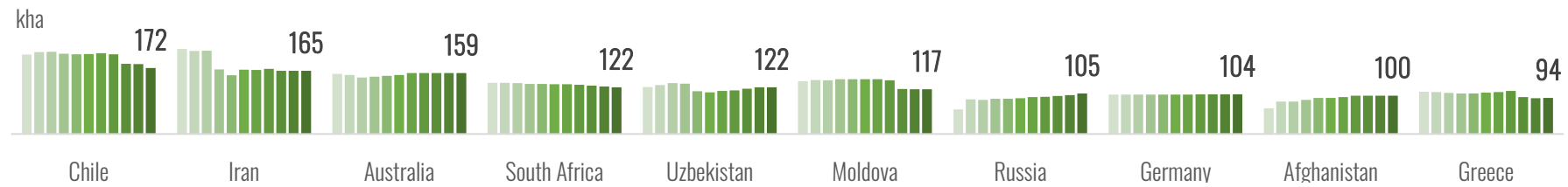
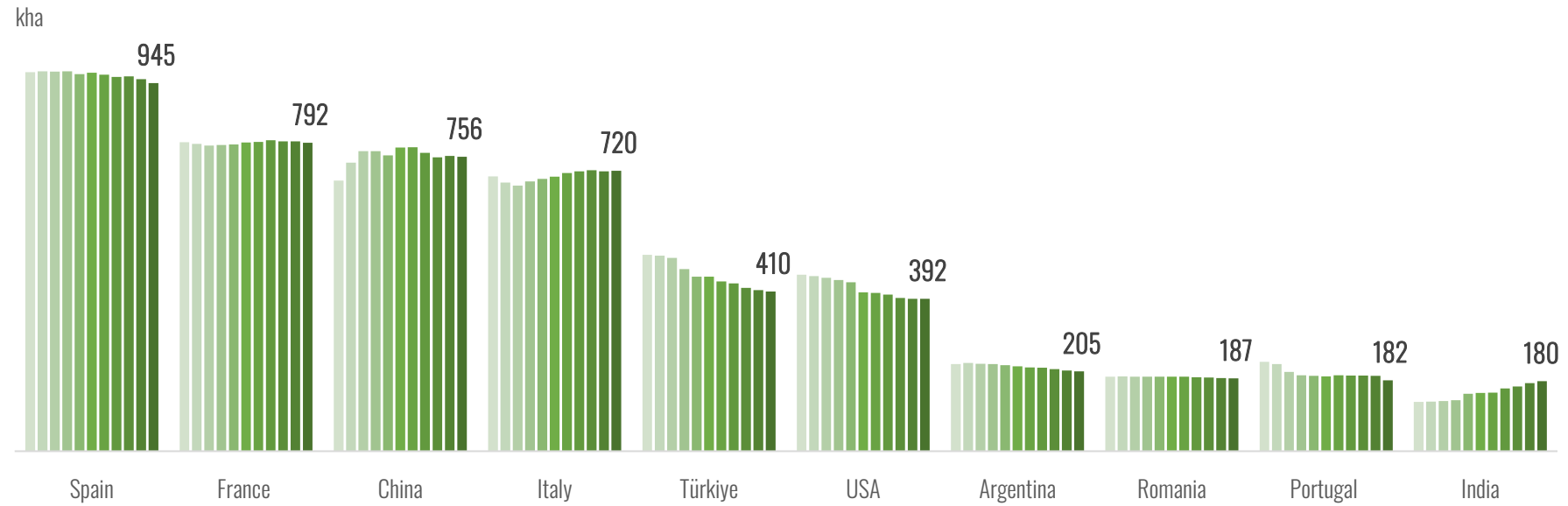
In 2023, the top 6 countries represent 56% of the world total, while the EU and the Southern Hemisphere account for 45% and 12%, respectively.





# Vineyard Surface Area

## Major countries by vineyard surface area, 2014-2023



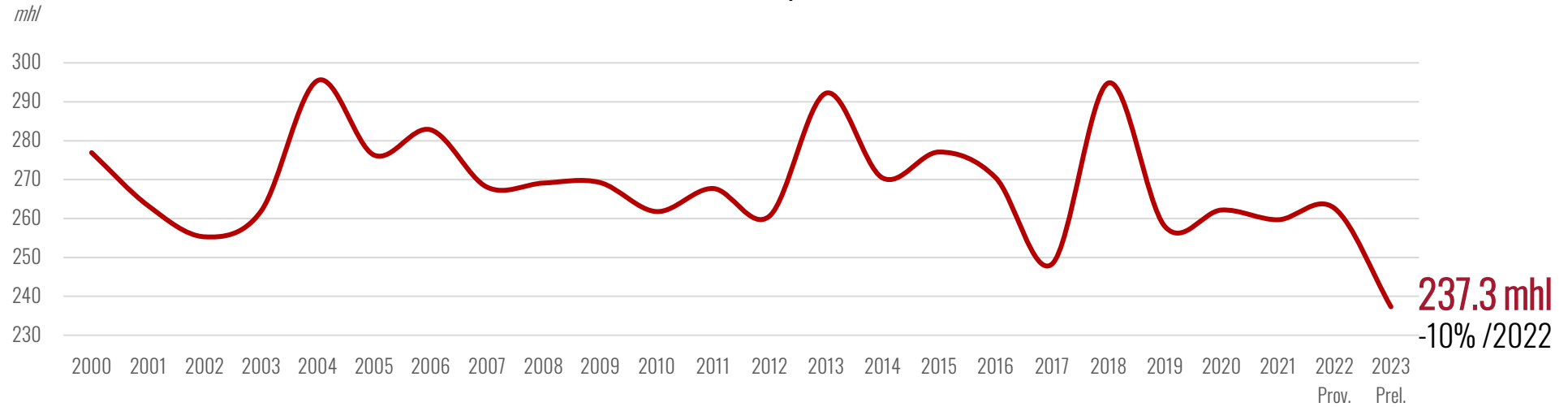


# Wine Production



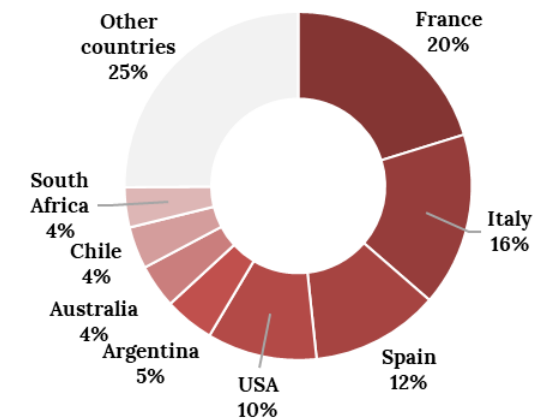
# Wine Production

## Evolution of world wine production



Extreme climatic conditions and widespread fungal diseases severely impacted many vineyards worldwide, culminating in a **historically low global wine production of 237 million hectolitres**. This marked a **10% drop from 2022** and represented the **lowest output since 1961**.

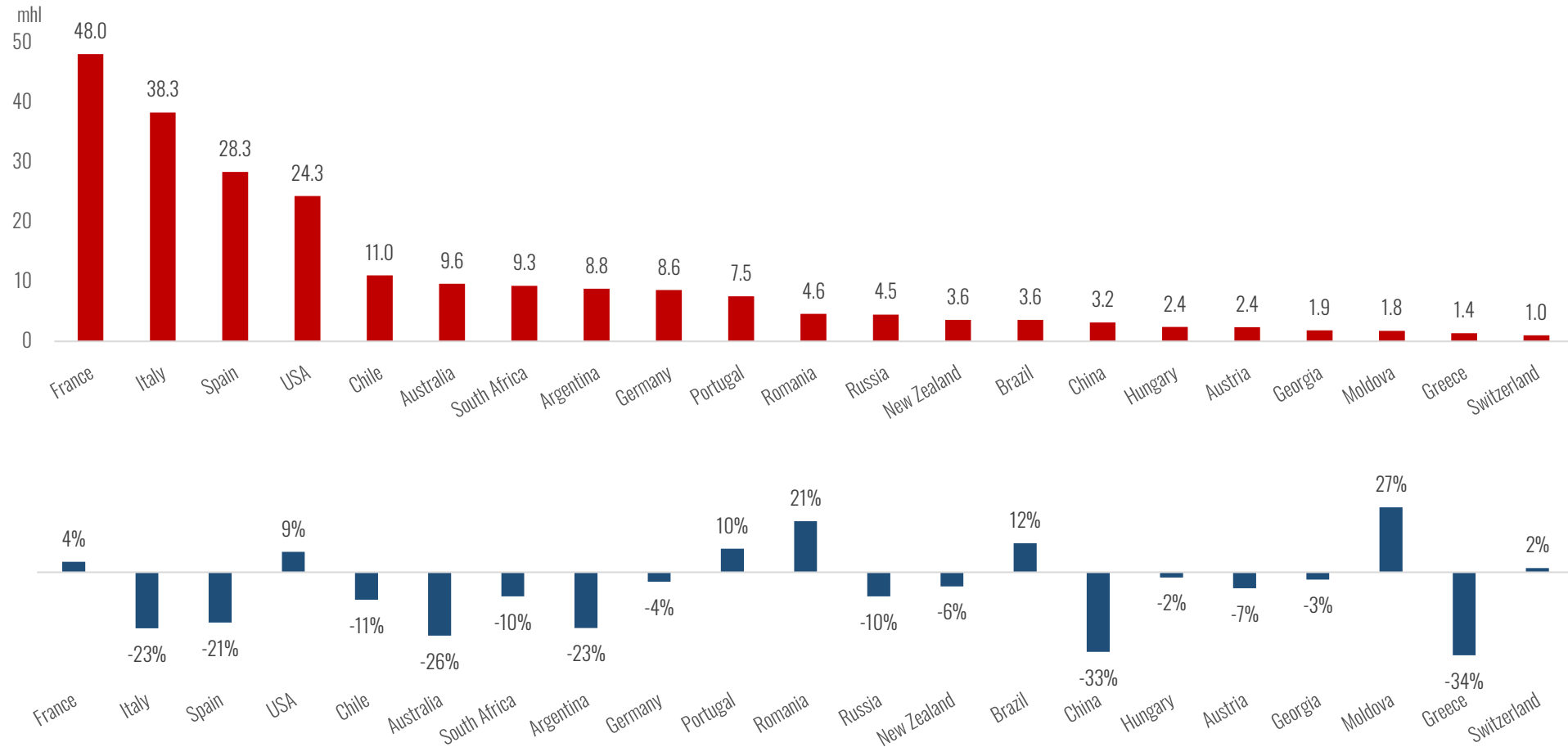
Very low production volumes were recorded in both the **EU (145 mhl, -11%/2022)** and the **Southern Hemisphere (47 mhl, -15%/2022)**.





# Wine Production

## Major wine producing countries in 2023





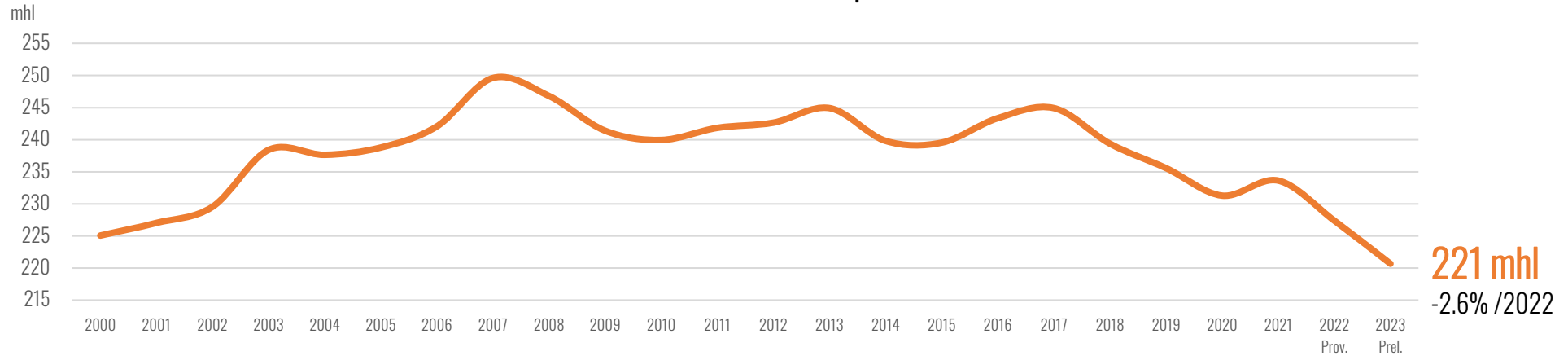


# Wine Consumption



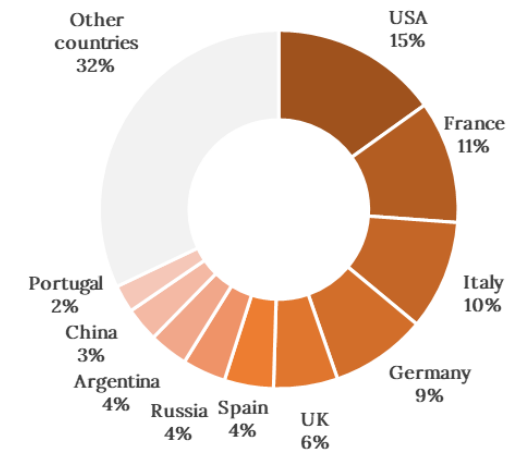
# Wine Consumption

### Evolution of world wine consumption



Global wine consumption in 2023 is estimated at **221 million hectolitres**, indicating a decrease of **2.6% compared to 2022's already low figures**. The spike in production and distribution costs, driven by **inflationary pressures**, led to higher wine prices for consumers, who were already dealing with diminished purchasing power. Despite these challenges, **a few major markets demonstrated resilience**.

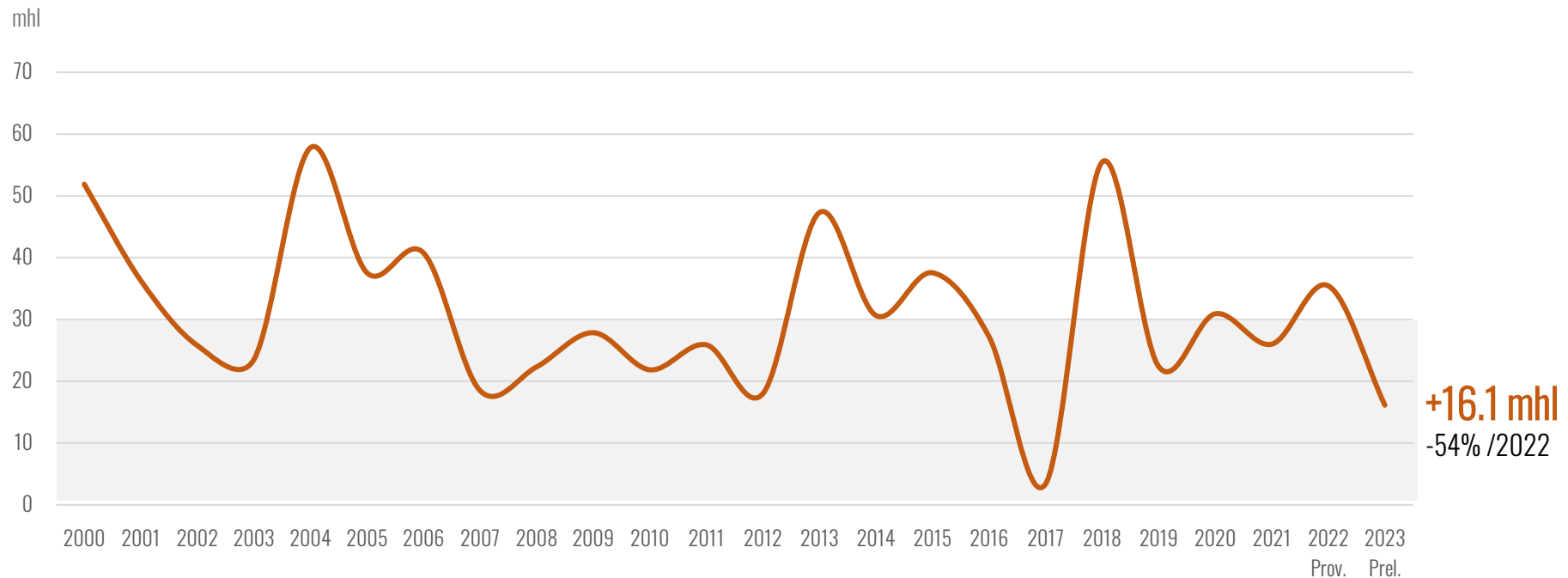
**More than two-thirds (68%) of global consumption is concentrated in the top 10 markets, with the top 5 consuming countries representing 51% of the world total. The EU (107 mhl, -2%/2022) accounts for 48%.**





# Wine Consumption

## Evolution of world wine production-consumption gap

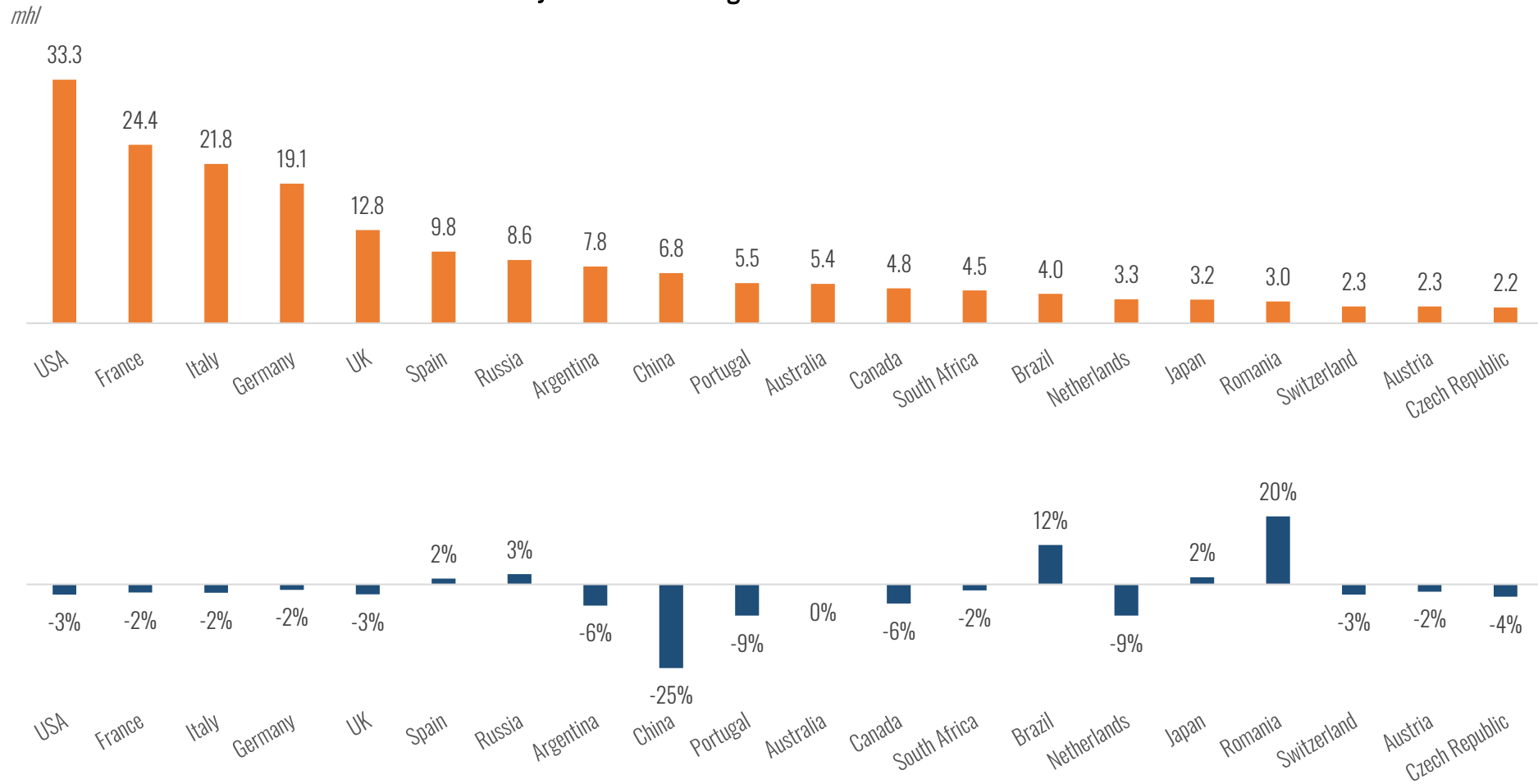


**The difference between wine production and wine consumption is estimated at +16.1 mhl (-54% / 2022). Considering that every year between 25 and 35 mhl of the total wine production are destined for industrial uses (i.e. distillation, vinegar, wine-based beverages, etc), the low production volume of 2023 is expected to bring equilibrium to the world market.**



# Wine Consumption

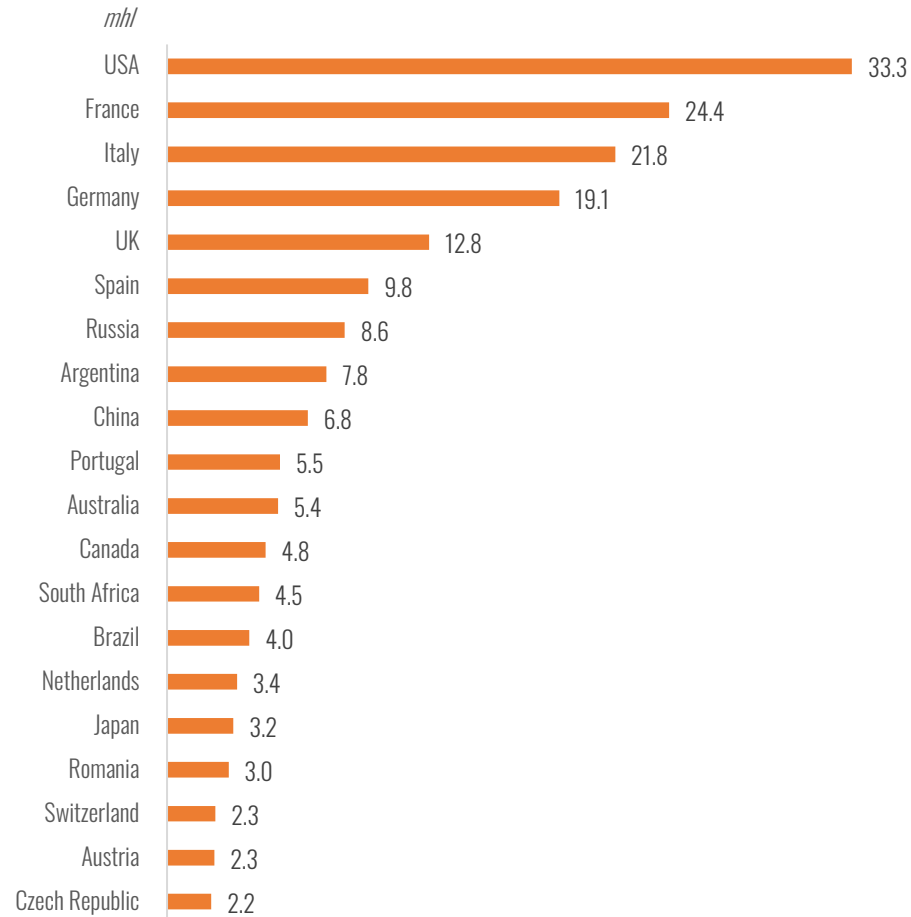
## Major wine-consuming countries in 2023



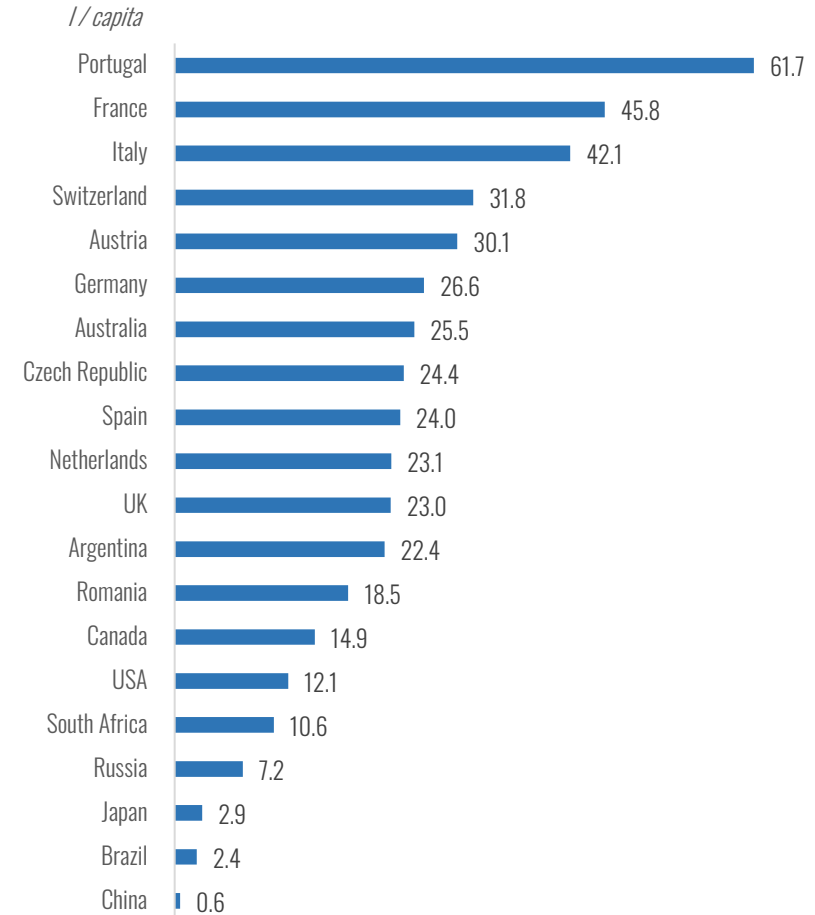


# Wine Consumption

### Major countries\* by total consumption in 2023



### Consumption per capita +15 in major consuming countries\* in 2023



\*Countries with 2023 wine consumption above 2 mhl

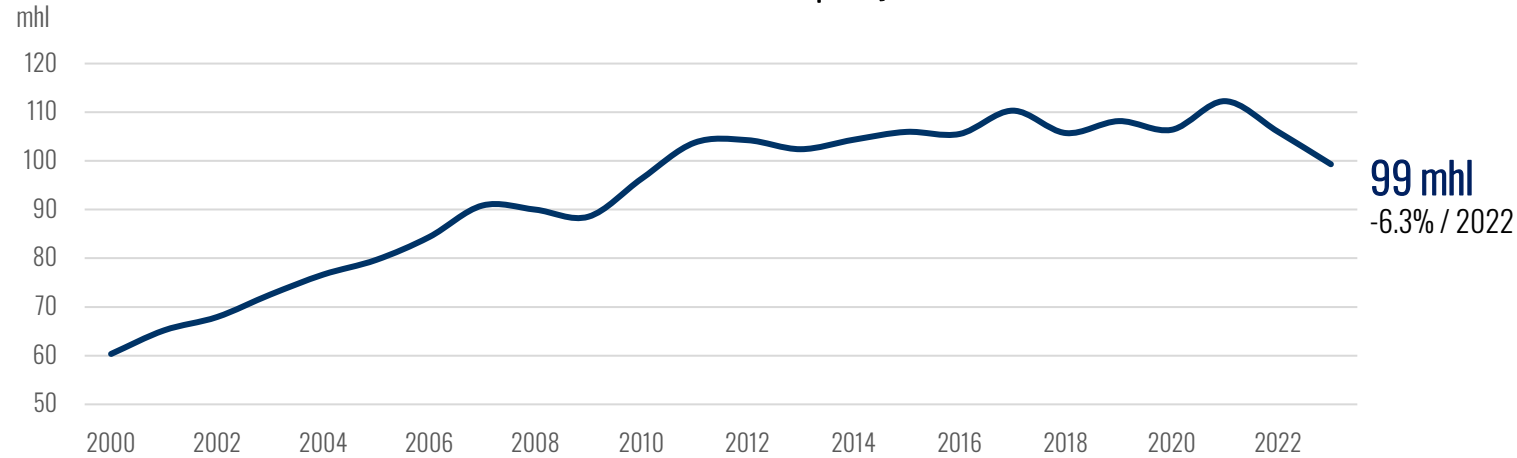


# International Trade in Wine



# International Trade in Wine

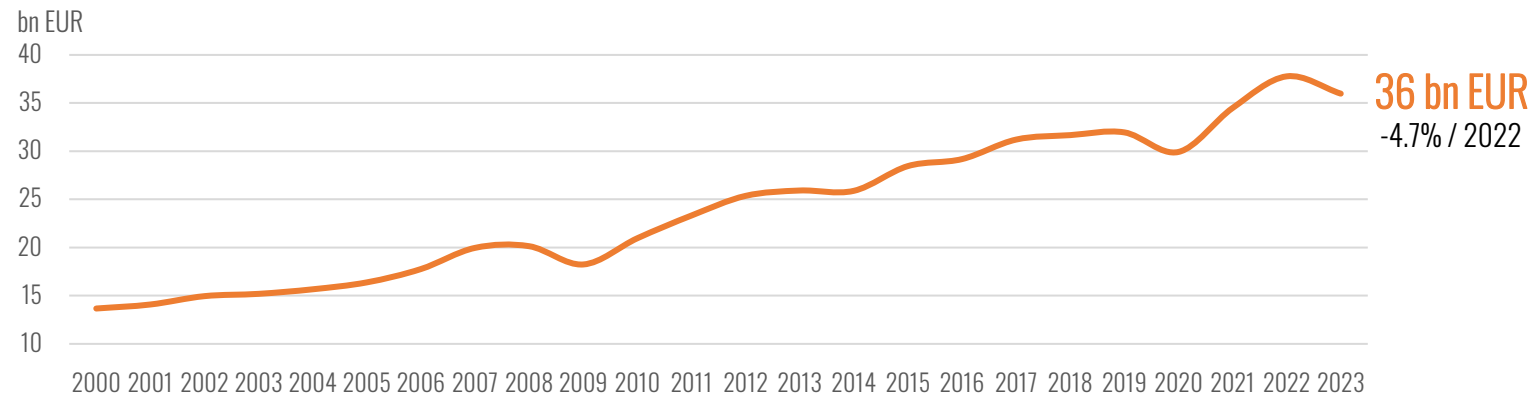
### Evolution of world wine export by VOLUME



**99 mhl**  
-6.3% / 2022

World wine exports in 2023 have **decreased by 6.3% in volume** compared to 2022, recording the **lowest volume since 2010**.

### Evolution of world wine export by VALUE



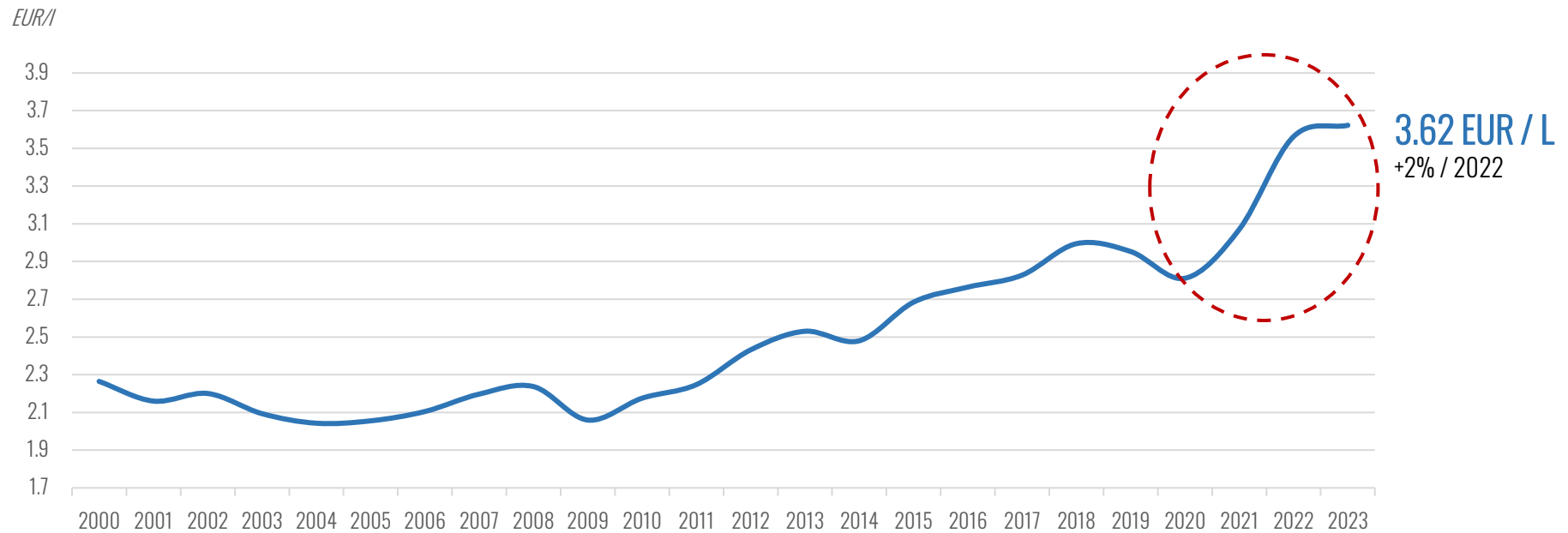
**36 bn EUR**  
-4.7% / 2022

Despite a **4.7% decrease** compared to the record high of 2022, the global wine export value in 2023 reached **36.0 billion EUR**, the **second highest ever recorded**.



# International Trade in Wine

## Evolution of world average export price

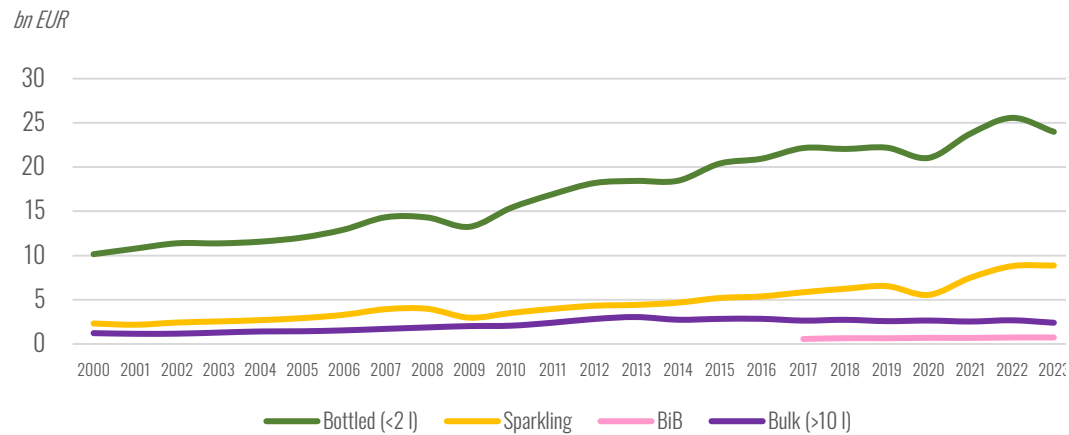
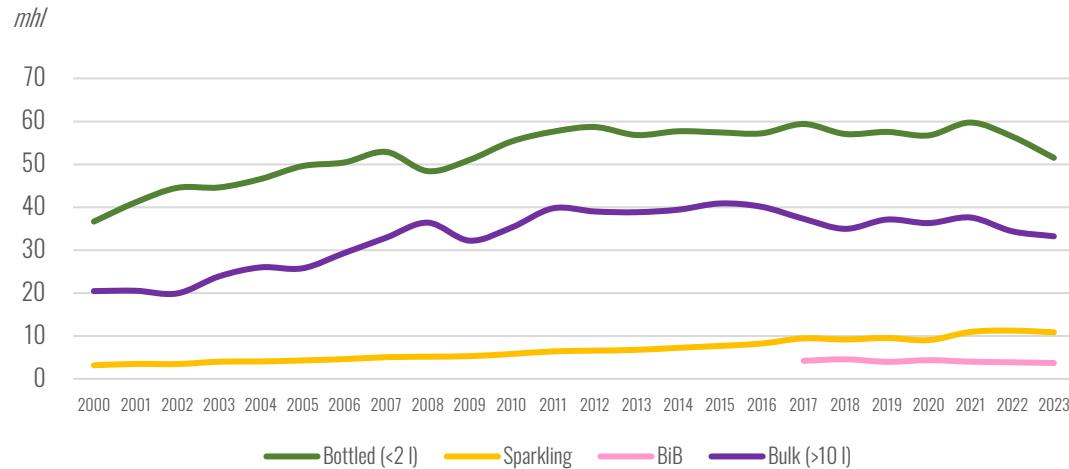


The average world export price of wine in 2023 peaked at **3.62 EUR/L**, the **highest ever recorded**. This represents **a significant increase of 29% since 2020**. This rise in prices primarily stems from higher costs incurred by producers, importers, and distributors, a **direct consequence of global inflationary pressures**.

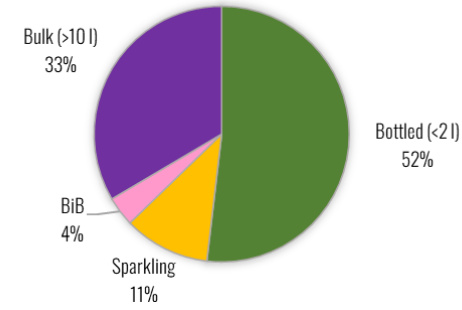




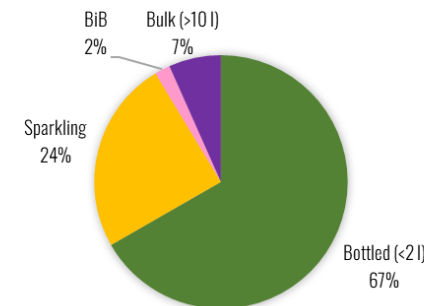
# International Trade in Wine



Breakdown of global trade VOLUME in 2023



Breakdown of global trade VALUE in 2023



## Bottled

Volume: -9% / 2022

Value: -6% / 2022

## Sparkling

Volume: -4% / 2022

Value: +1% / 2022

## Bag-in-Box (BiB)

Volume: -4% / 2022

Value: +0% / 2022

## Bulk

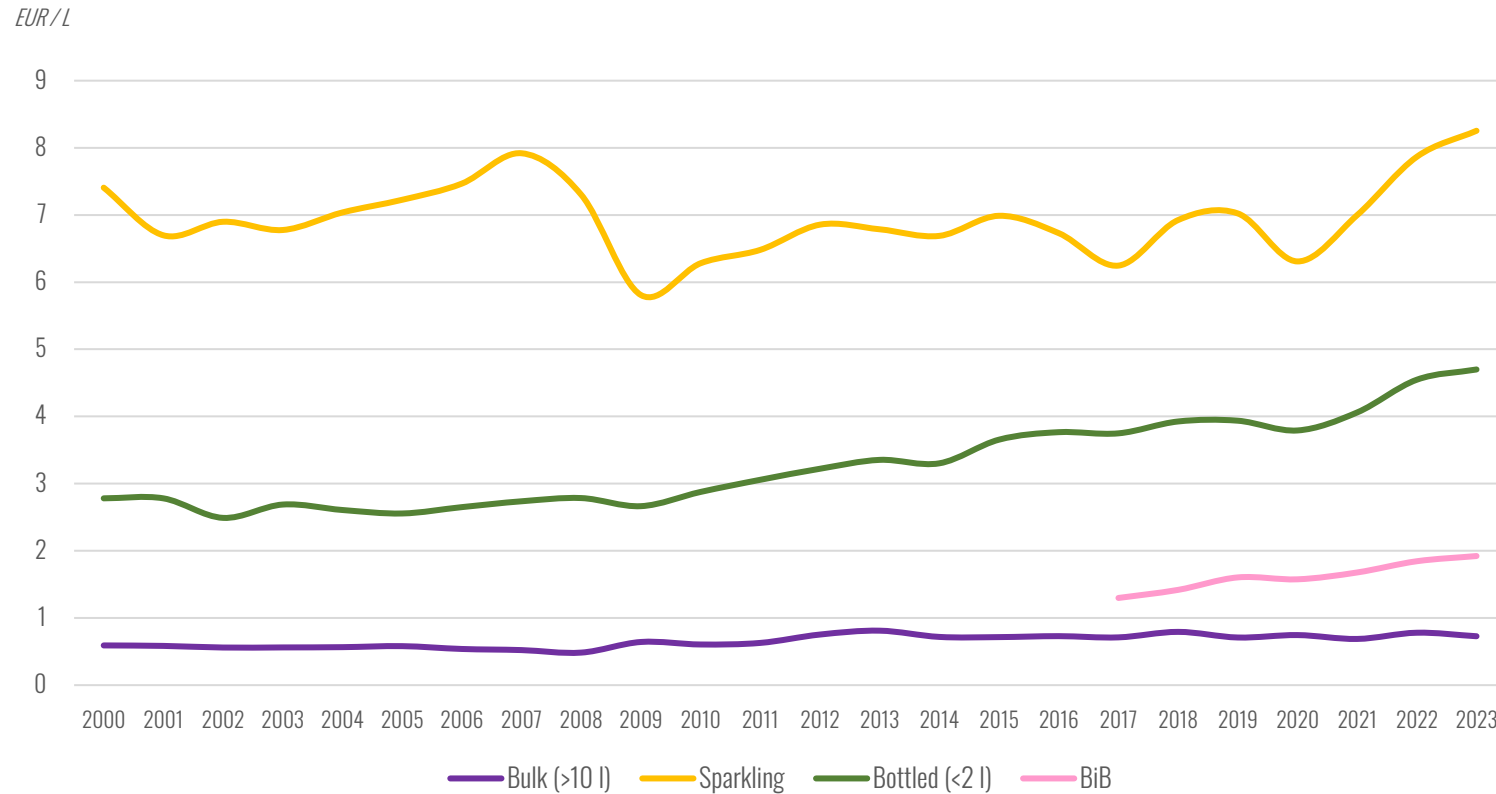
Volume: -4% / 2022

Value: -10% / 2022



# International Trade in Wine

## Evolution of world average export price by category



### Sparkling

+5%/2022

+31%/2020

### Bottled

+3%/2022

+24%/2020

### Bag-in-Box (BiB)

+4%/2022

+22%/2020

### Bulk

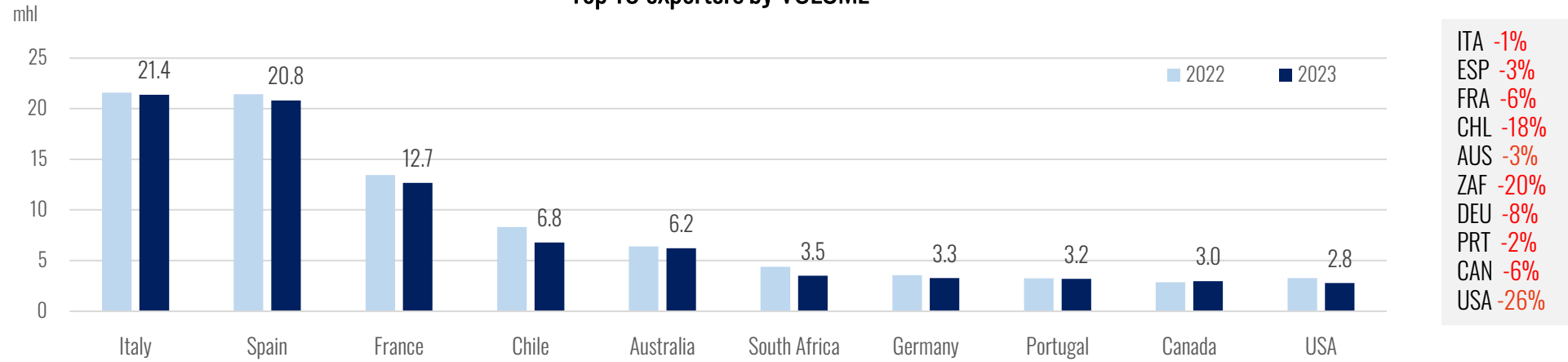
-7%/2022

-2%/2020

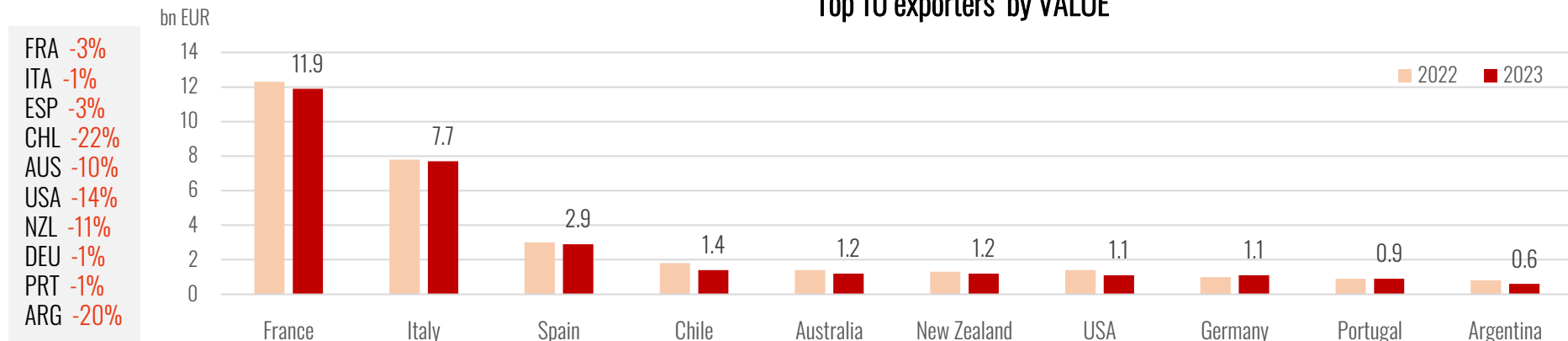


# Main Wine Exporters

### Top 10 exporters by VOLUME



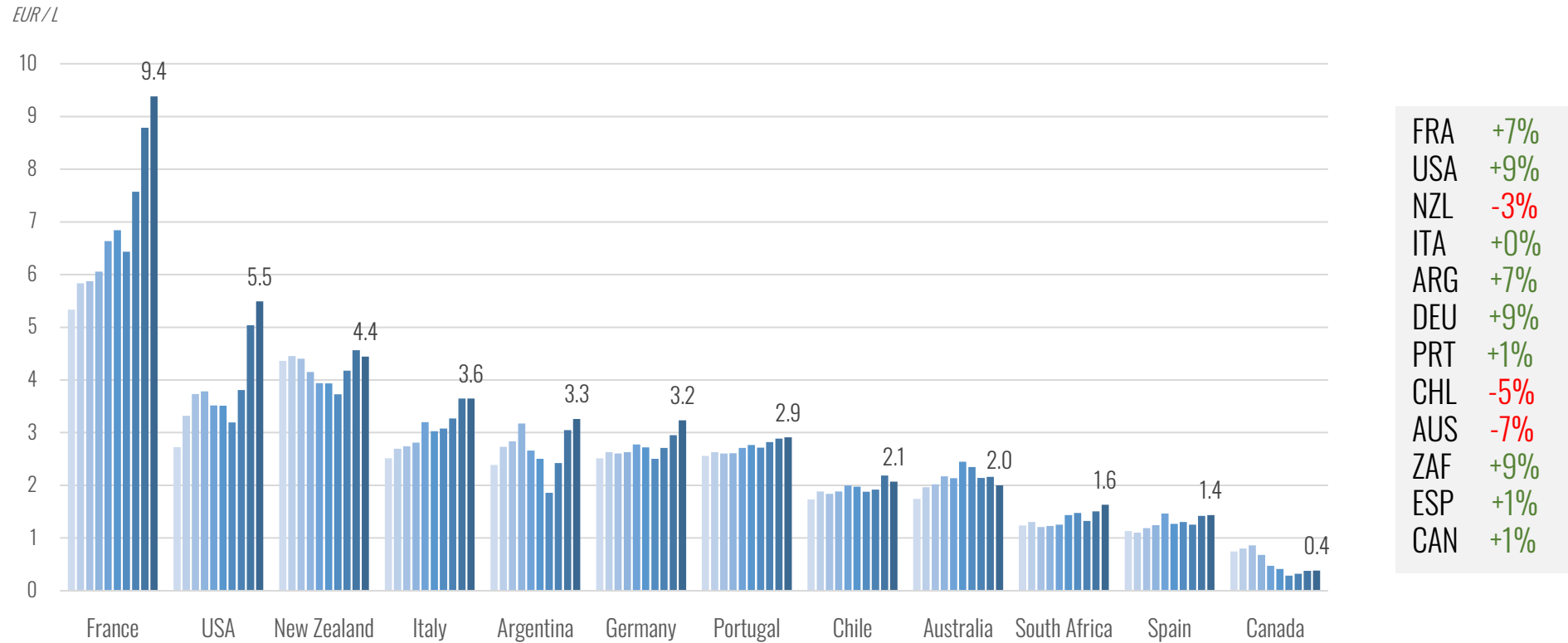
### Top 10 exporters by VALUE





# Main Wine Exporters

## Major Exporters by Average Export Price, 2014-2023

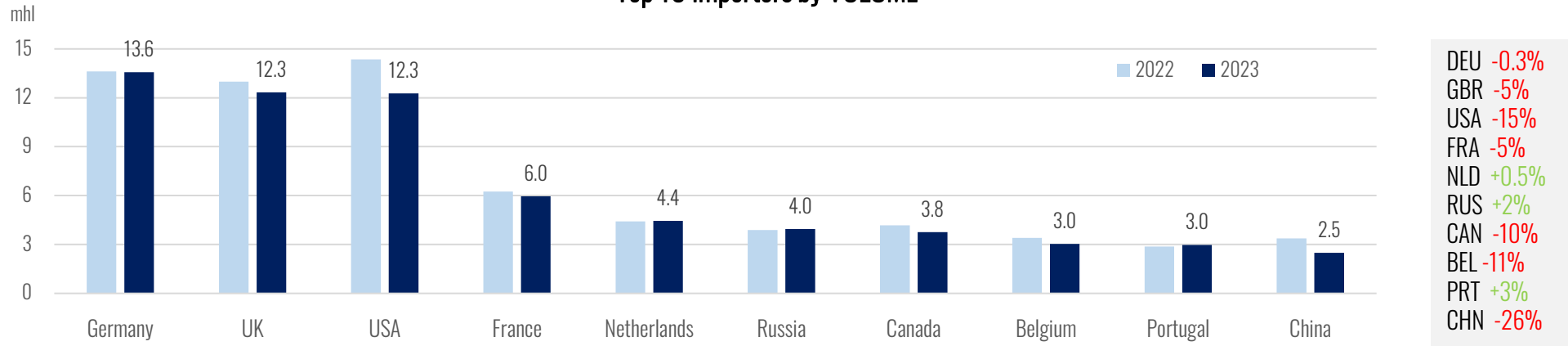


\*Countries listed as top 10 exporters, by volume or value in 2023

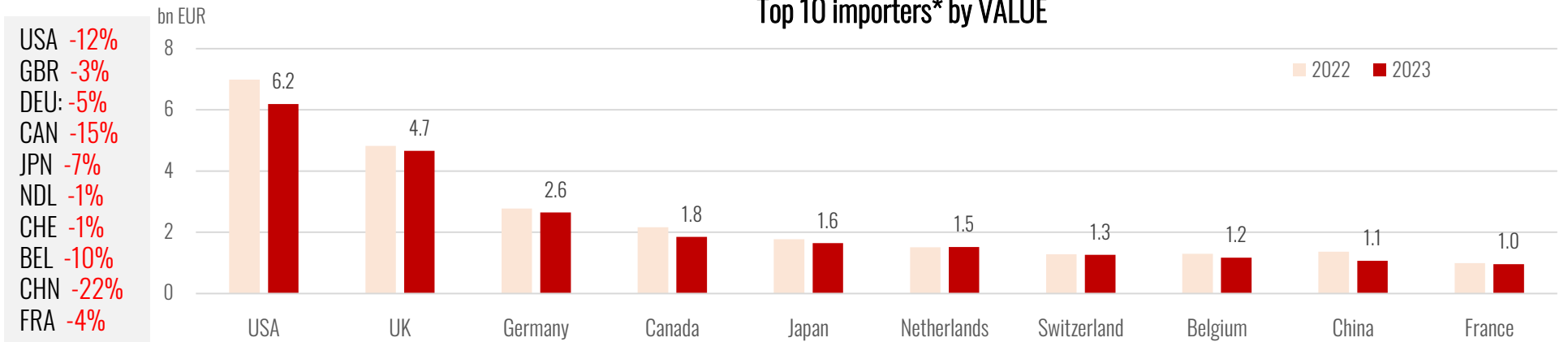


# Main Wine Importers

### Top 10 importers by VOLUME



### Top 10 importers\* by VALUE



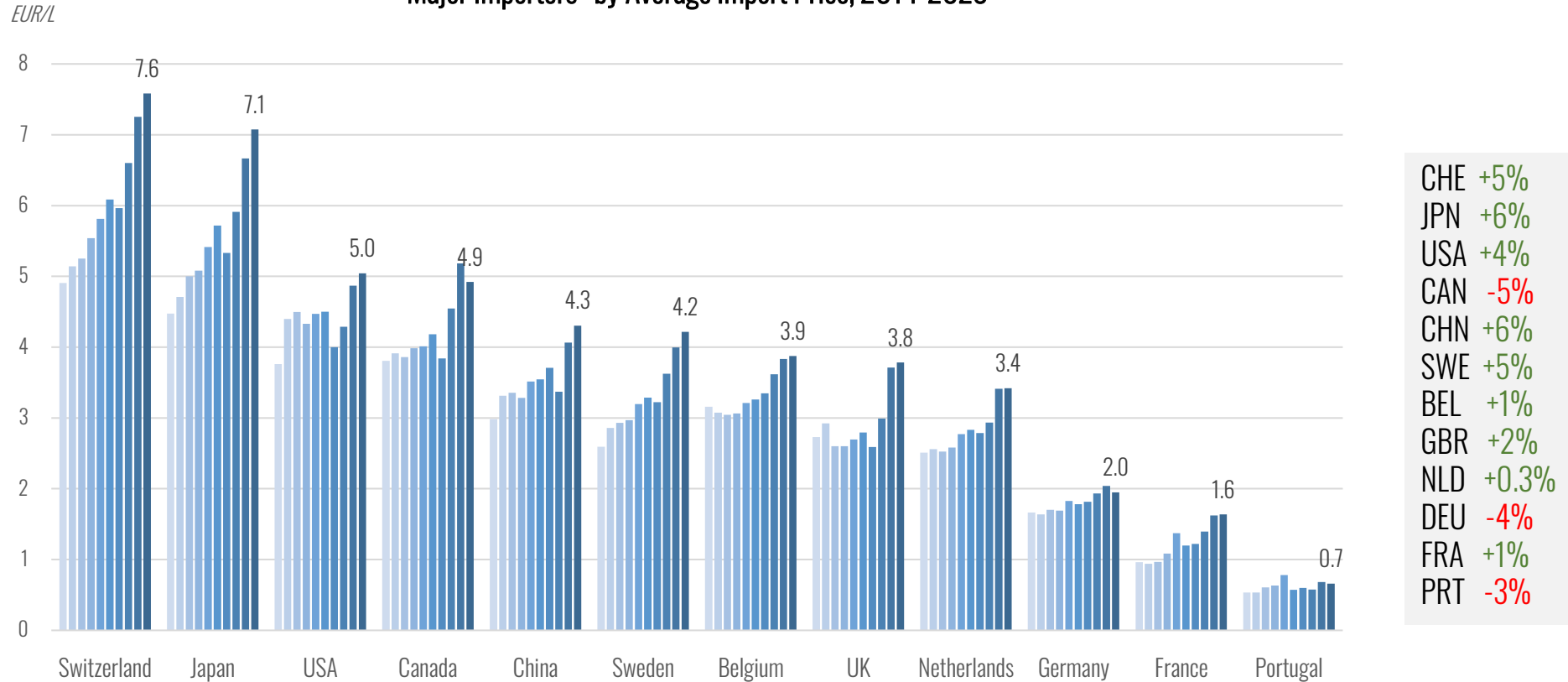
\*data on Russia not available





# Main Wine Importers

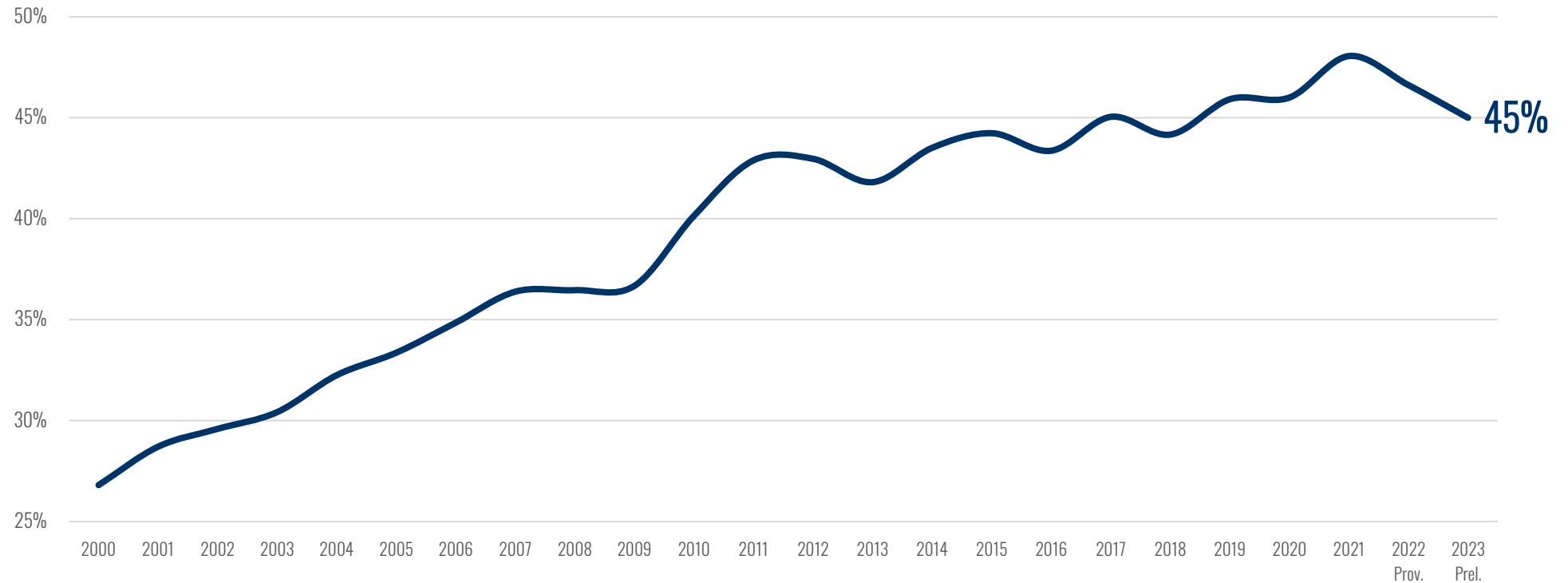
### Major Importers\* by Average Import Price, 2014-2023



\*Countries listed as top 10 importers, by volume or value  
 \*data on Russia not available



# Market Internationalisation Index



Wine market internationalisation index = ratio between the volumes of world wine exports and world wine consumption

→ **45% of the wine consumed worldwide in 2023 is imported wine**, a sign that the world wine market is highly globalised



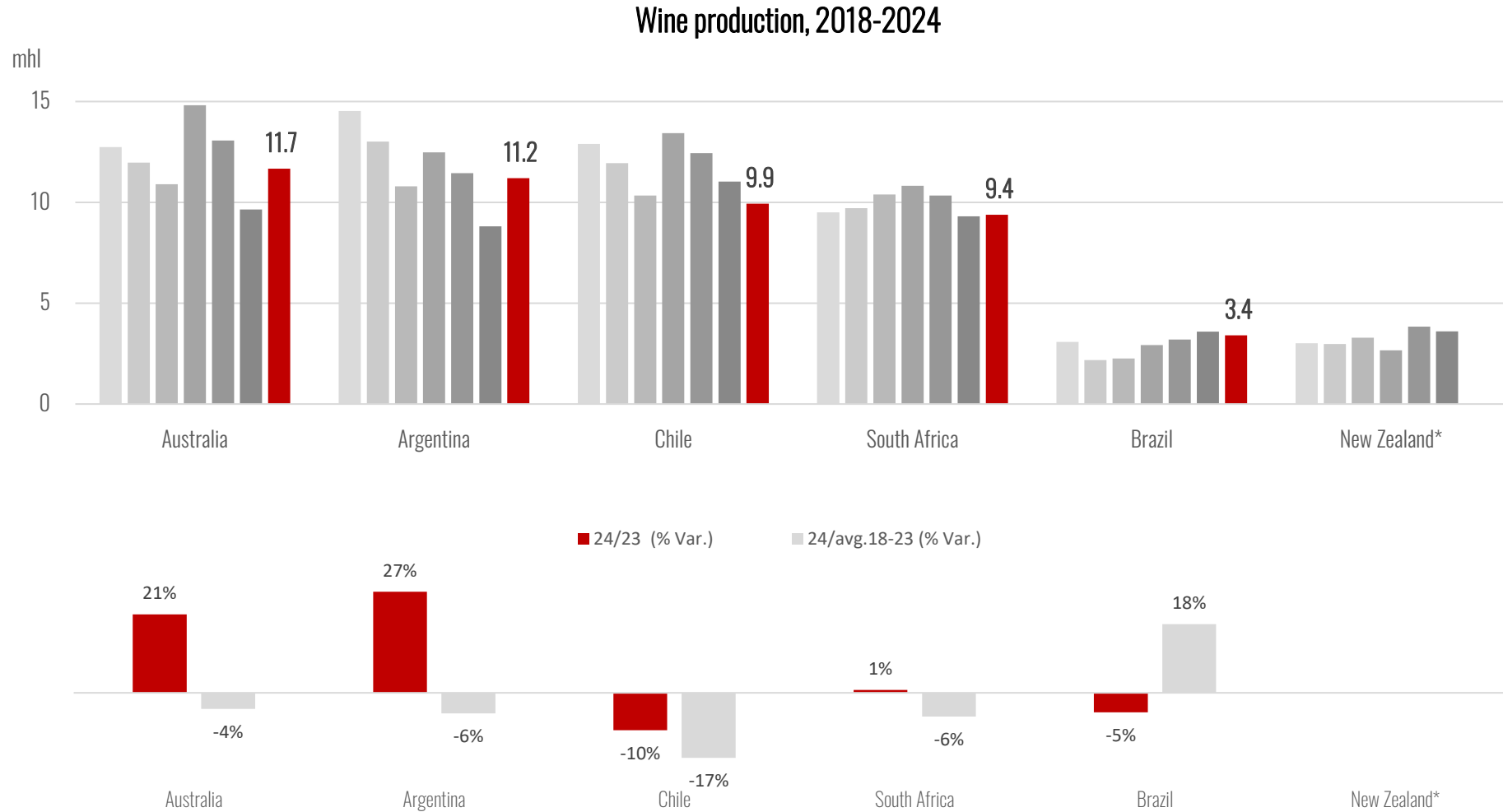
# Wine Production in the Southern Hemisphere in 2024

*First Preliminary Estimates*



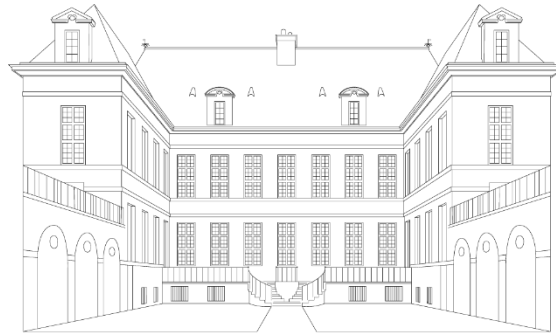


# Preliminary Estimates Wine Production 2024



\*Data 2024 not available yet

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