



INTERNATIONAL ORGANISATION OF VINE AND WINE

OIV CONFERENCE

29 NOVEMBER 2024

John Barker, Director General
Giorgio Delgrosso, Head of Statistics Department
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OIV  100 



100 Years Data

Vineyard Surface Area

Wine Production

Wine Consumption

International Trade in Wine

World Wine Production Outlook

First Estimates 2024

2025-2029 OIV Strategic Plan



INTERNATIONAL ORGANISATION OF VINE AND WINE

THE GLOBAL VINE AND WINE SECTOR: 100 YEARS OF EVOLUTION

OIV Press Conference

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Vineyard Surface Area



All Vine Products



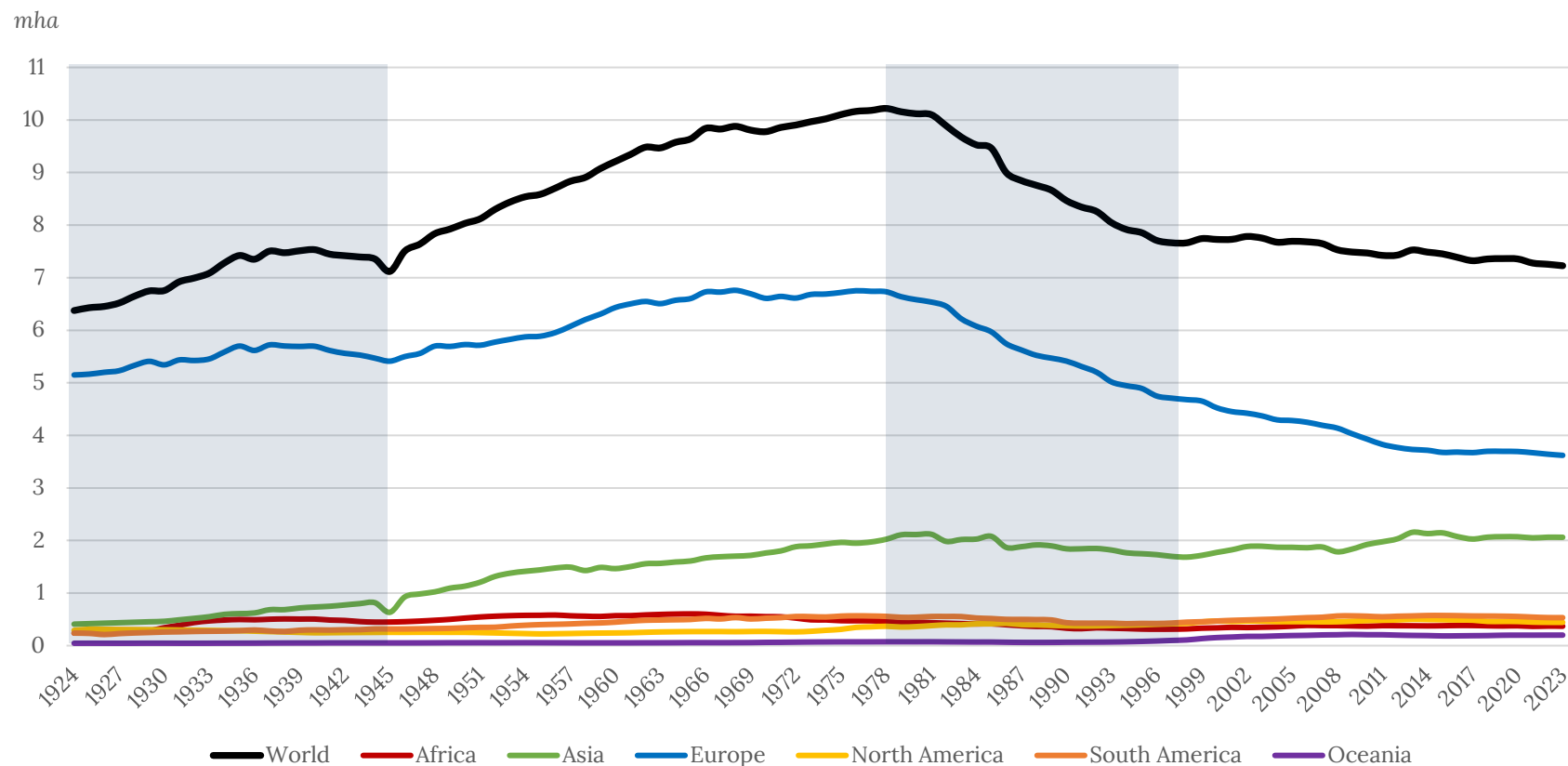
1978 Peak at 10 mha



Europe No.1

Vineyard Surface Area

Vineyard Surface Area 1924-2023





Wine Production





Continuous Fluctuation



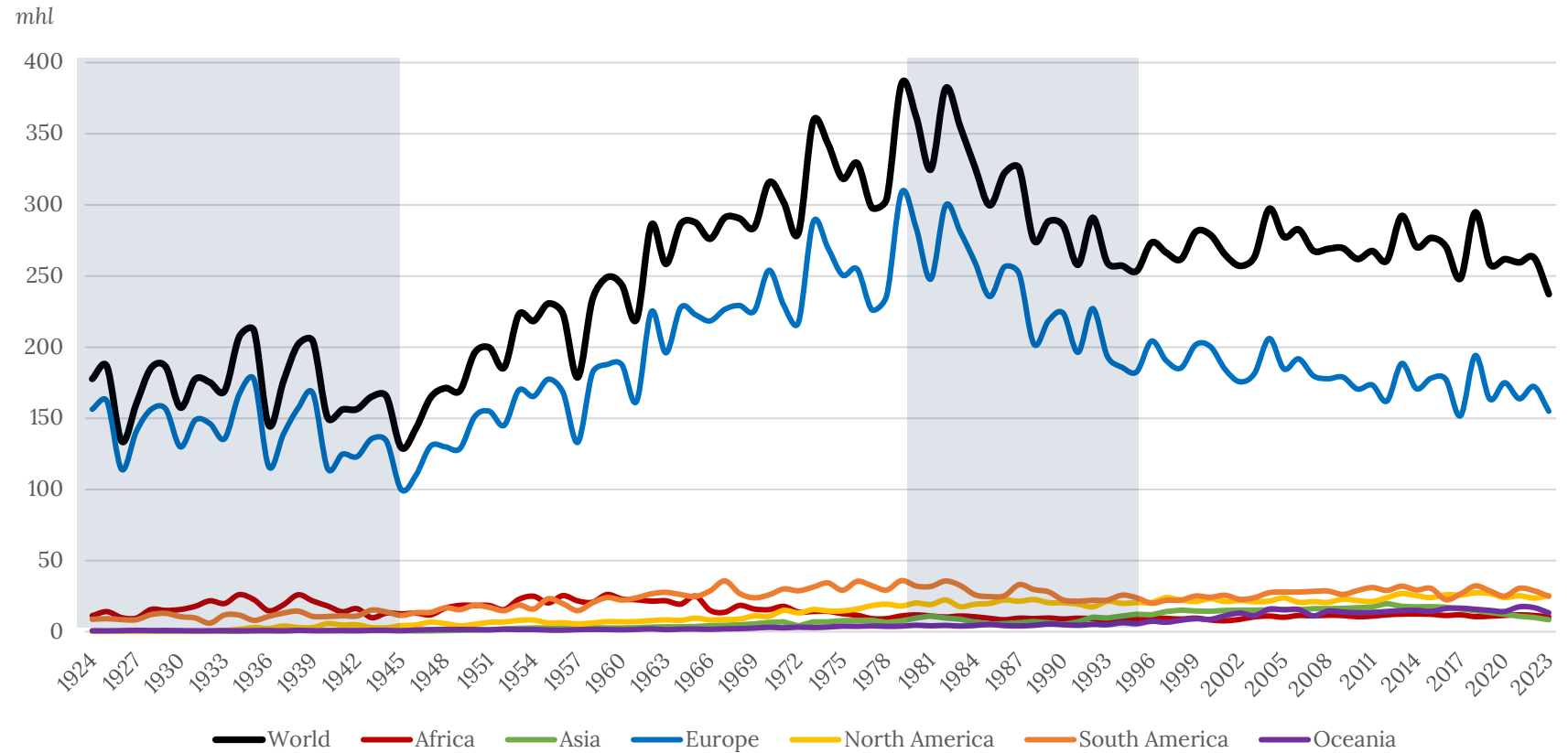
1979 Peak at 385 mhl



Shifting Geographies

Wine Production

Wine Production 1924-2023





Algeria Impact



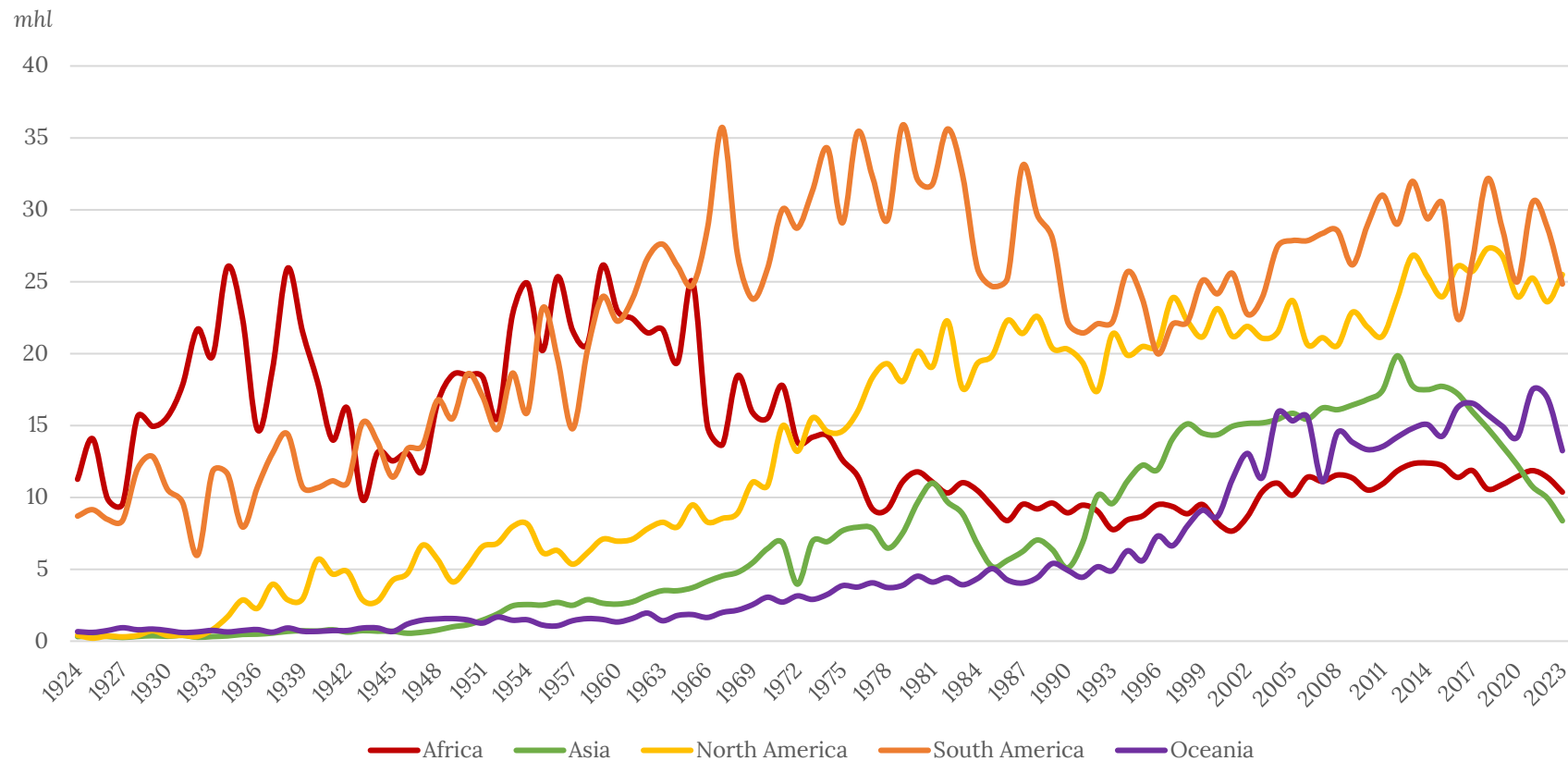
Export Driven



"New" Producers

Wine Production

Wine Production (excl. Europe) 1924-2023





Continuous Fluctuation



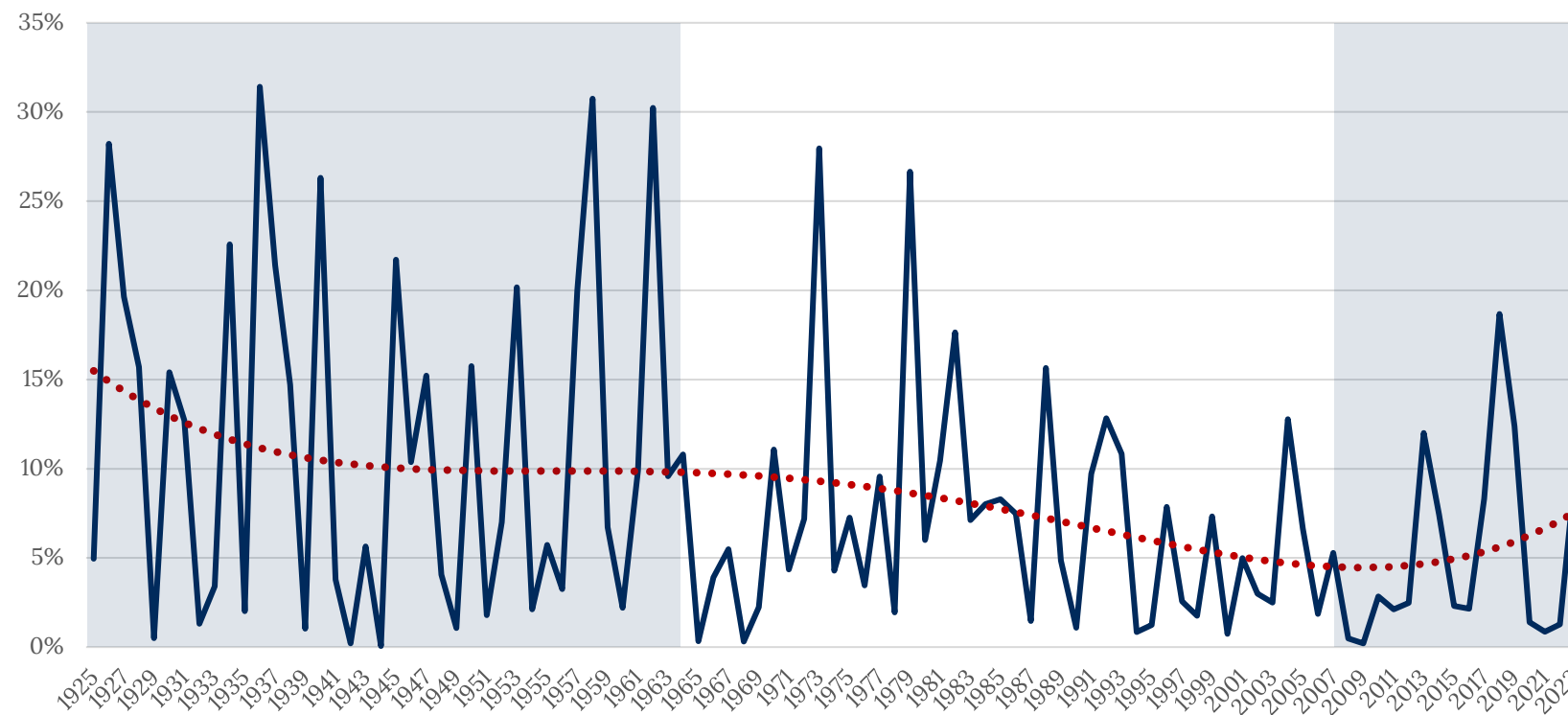
Tech Development



Climate change

Wine Production

Volatility Indicator (abs. value of y-o-y variation)





Wine Consumption



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Europe Leader



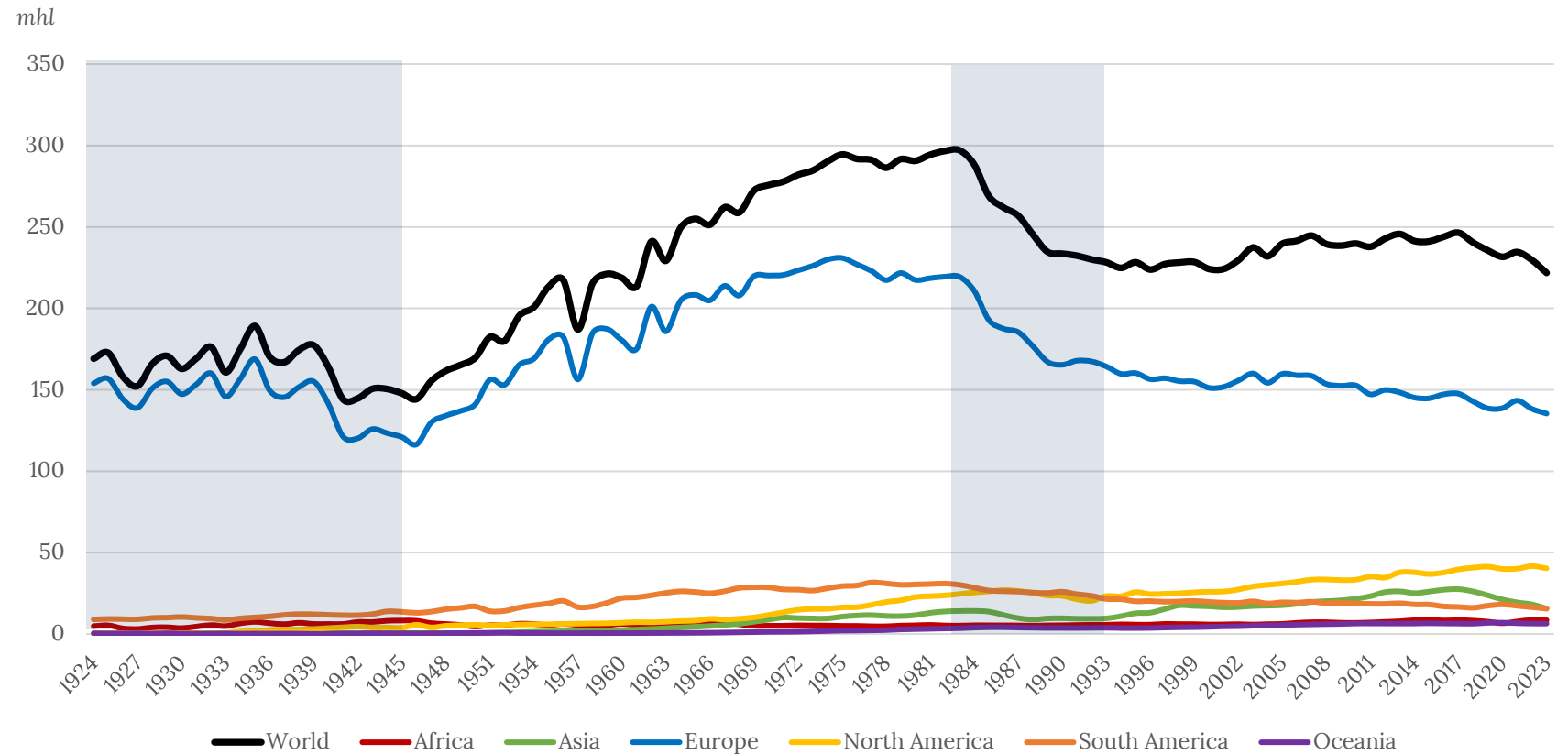
New Consumers



Shifting Preferences

Wine Consumption

Wine Consumption 1924-2023





Economic Growth



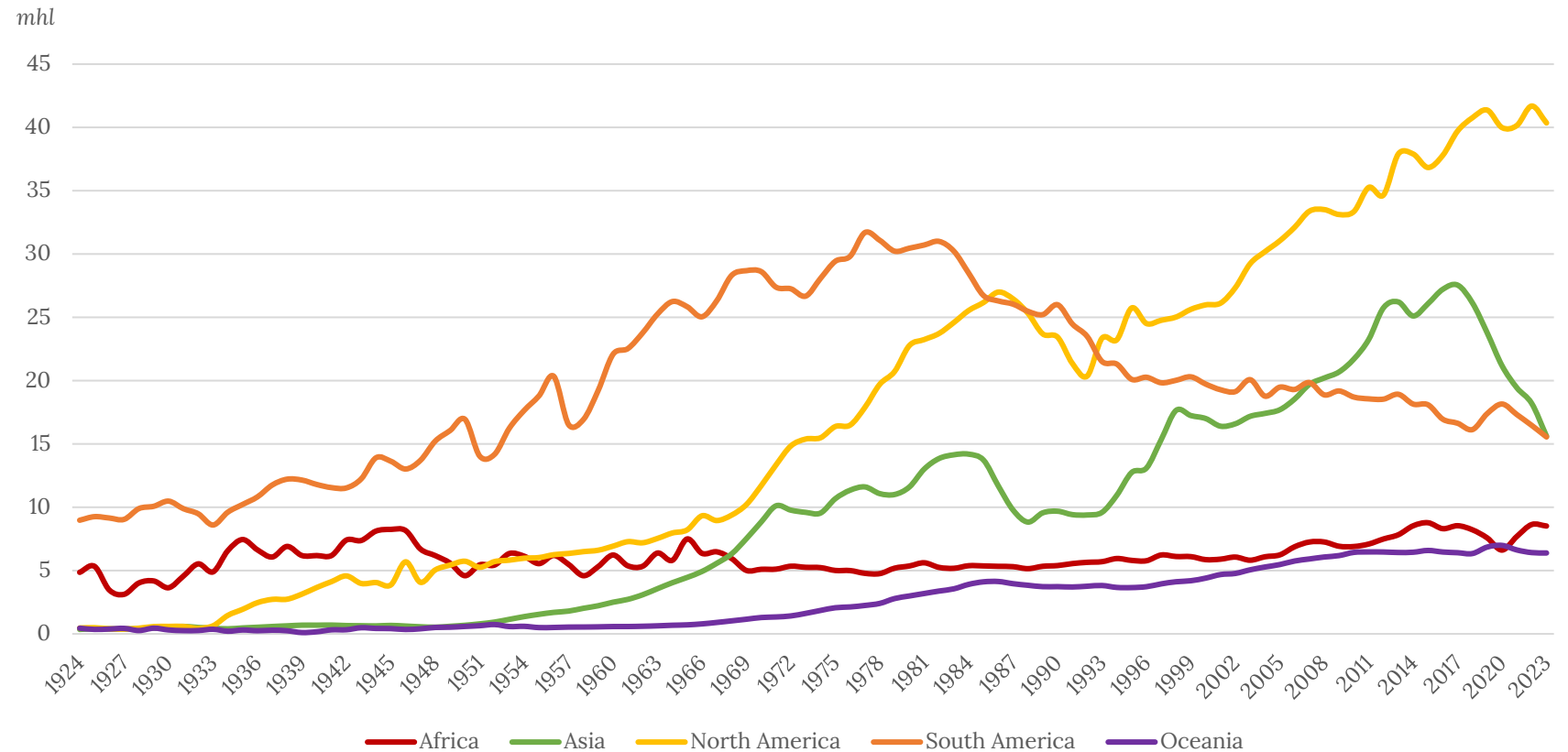
Globalising Consumption



Consumers = Producers

Wine Consumption

Wine Consumption (excl. Europe) 1924-2023



Wine Consumption

1924 vs. 2023 (%)

Europe



South America



Africa



North America



Asia

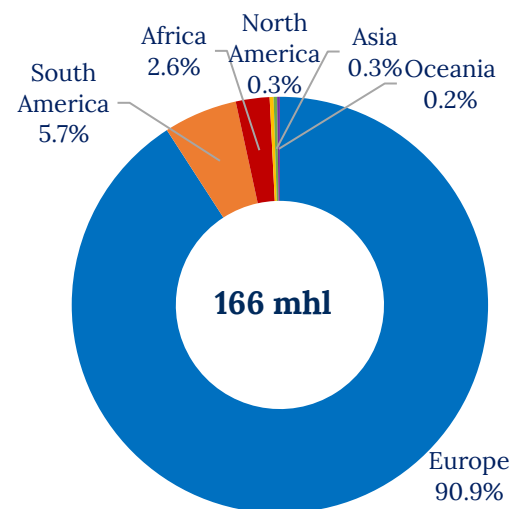


Oceania

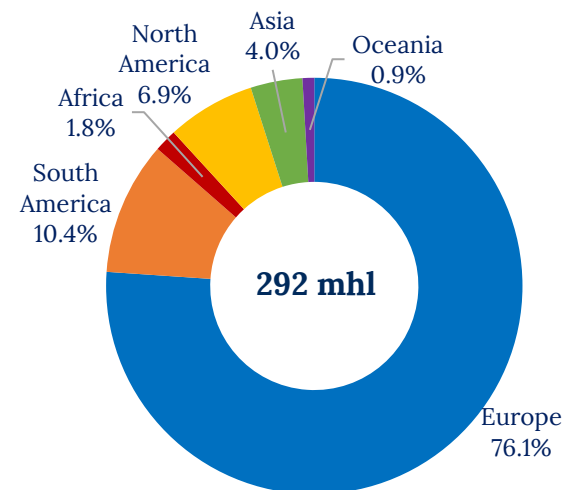


Continental Breakdown Evolution

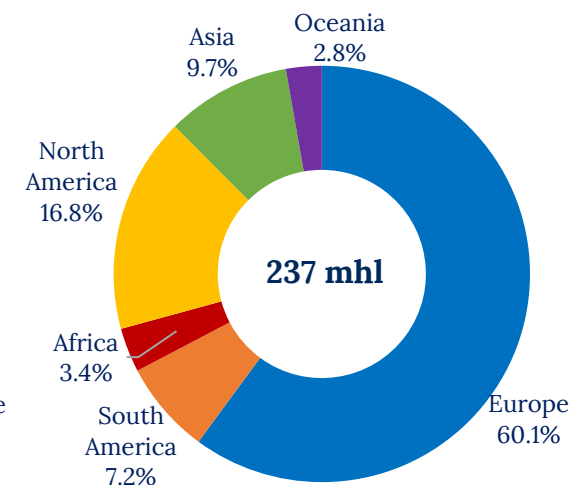
Average 1924-1933



Average 1974-1983



Average 2014-2023





International Trade in Wine



Growth



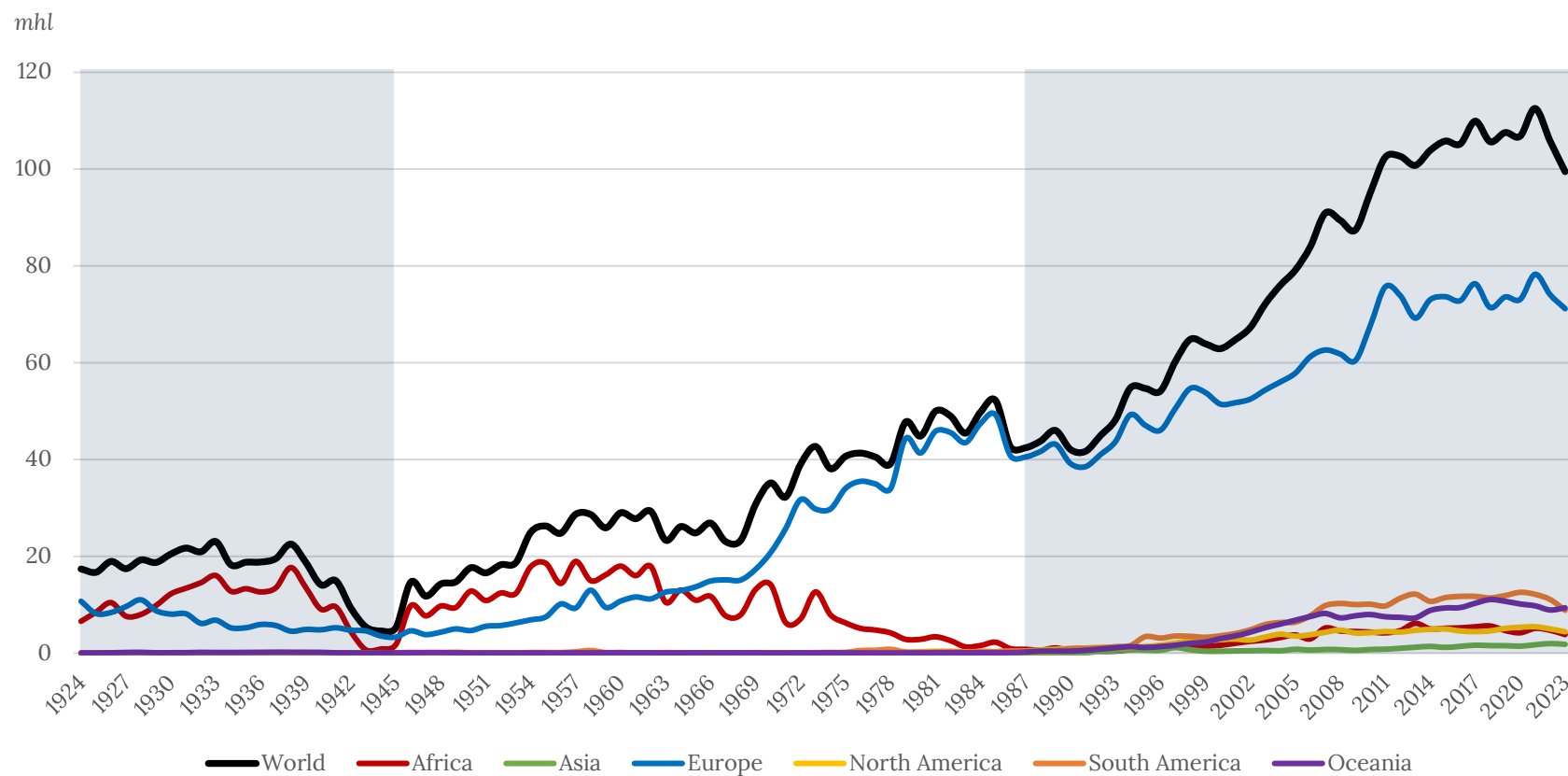
Globalisation



Trade Agreements

International Trade in Wine

Wine Exports 1924-2023





Algeria Impact



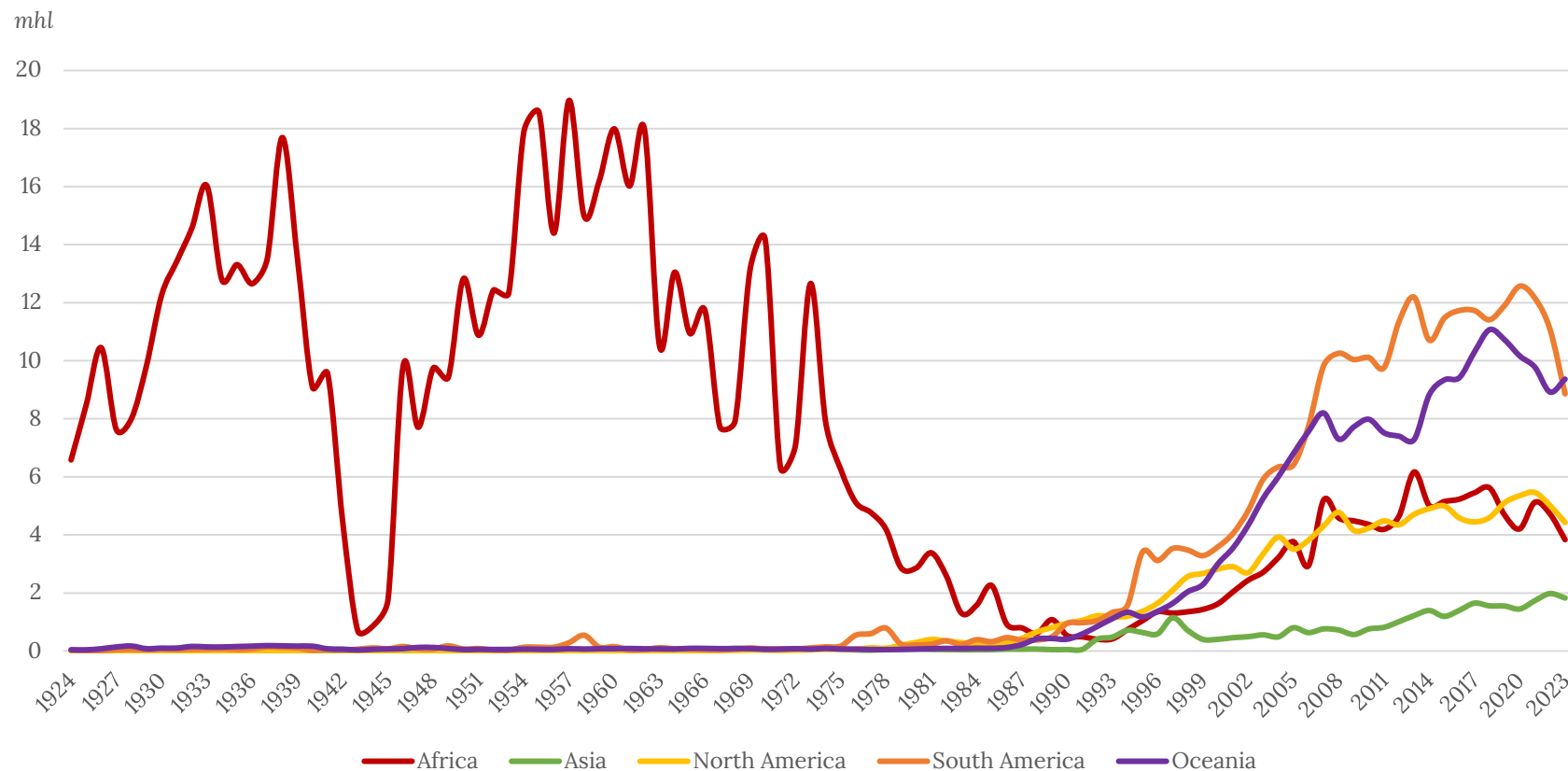
Ease of Trade



New Producers Exporting

International Trade in Wine

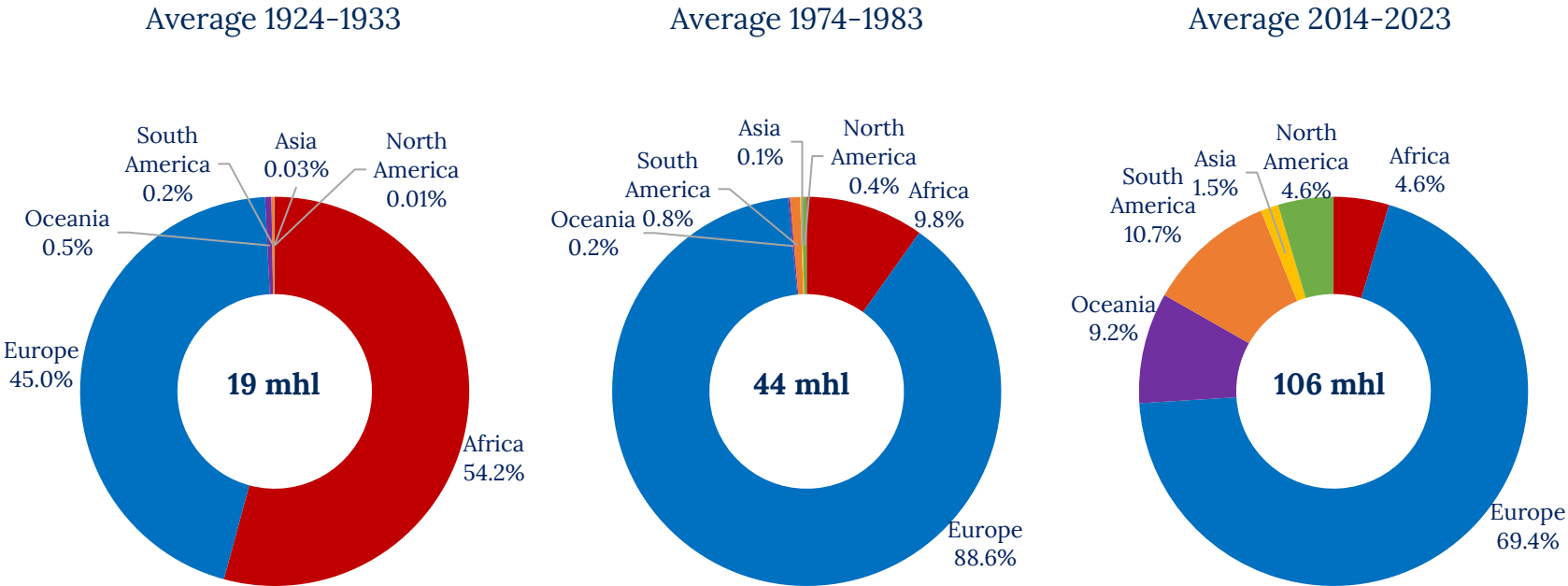
Wine Exports (excl. Europe) 1924–2023



1924 vs. 2023 (%)

- Africa
- Europe
- Oceania
- South America
- North America
- Asia

Continental Breakdown Evolution





Pre-1970 Stability



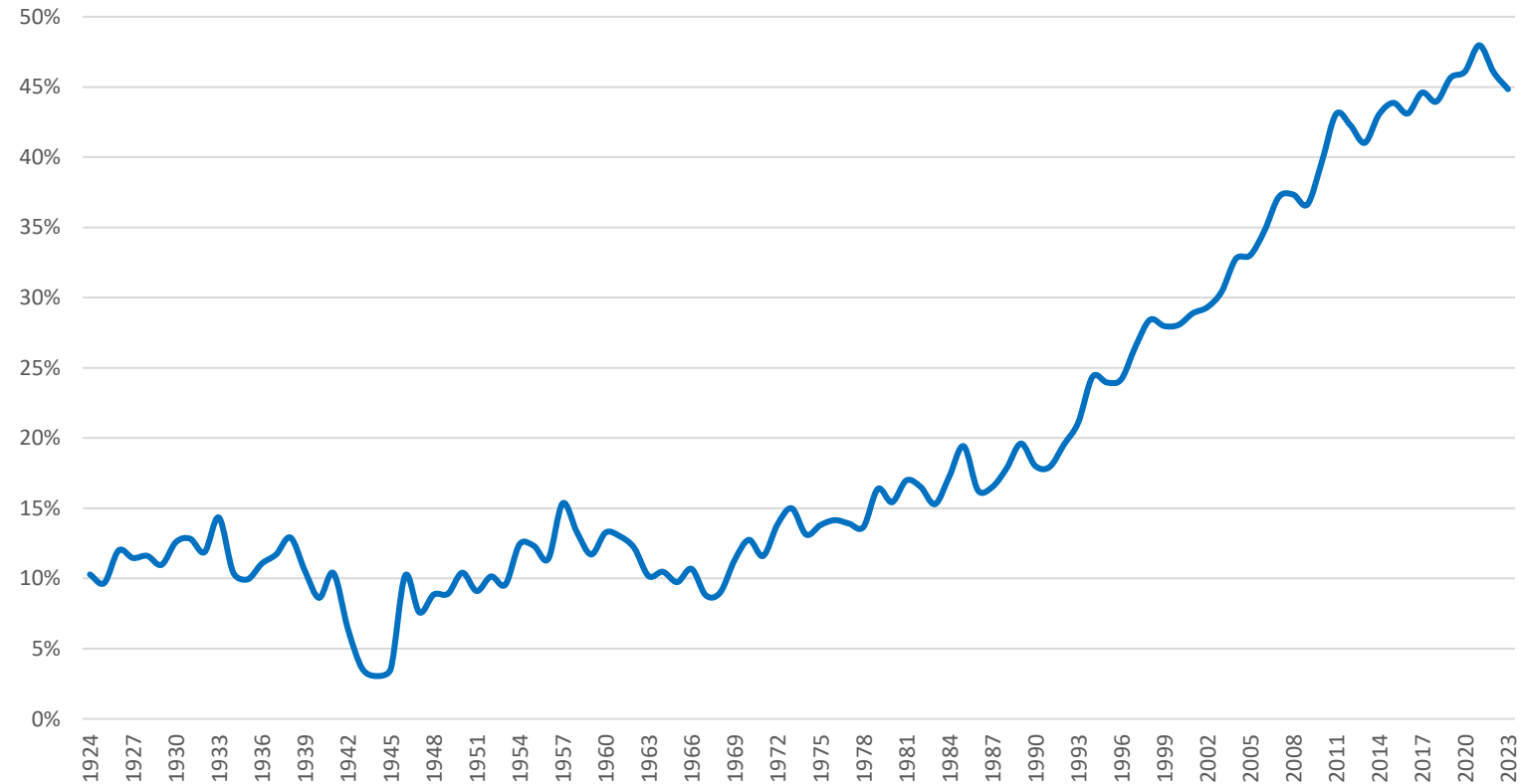
Post-1970 Surge



2021 Peak 48%

Market Internationalisation Index

Internationalisation Index 1924-2023

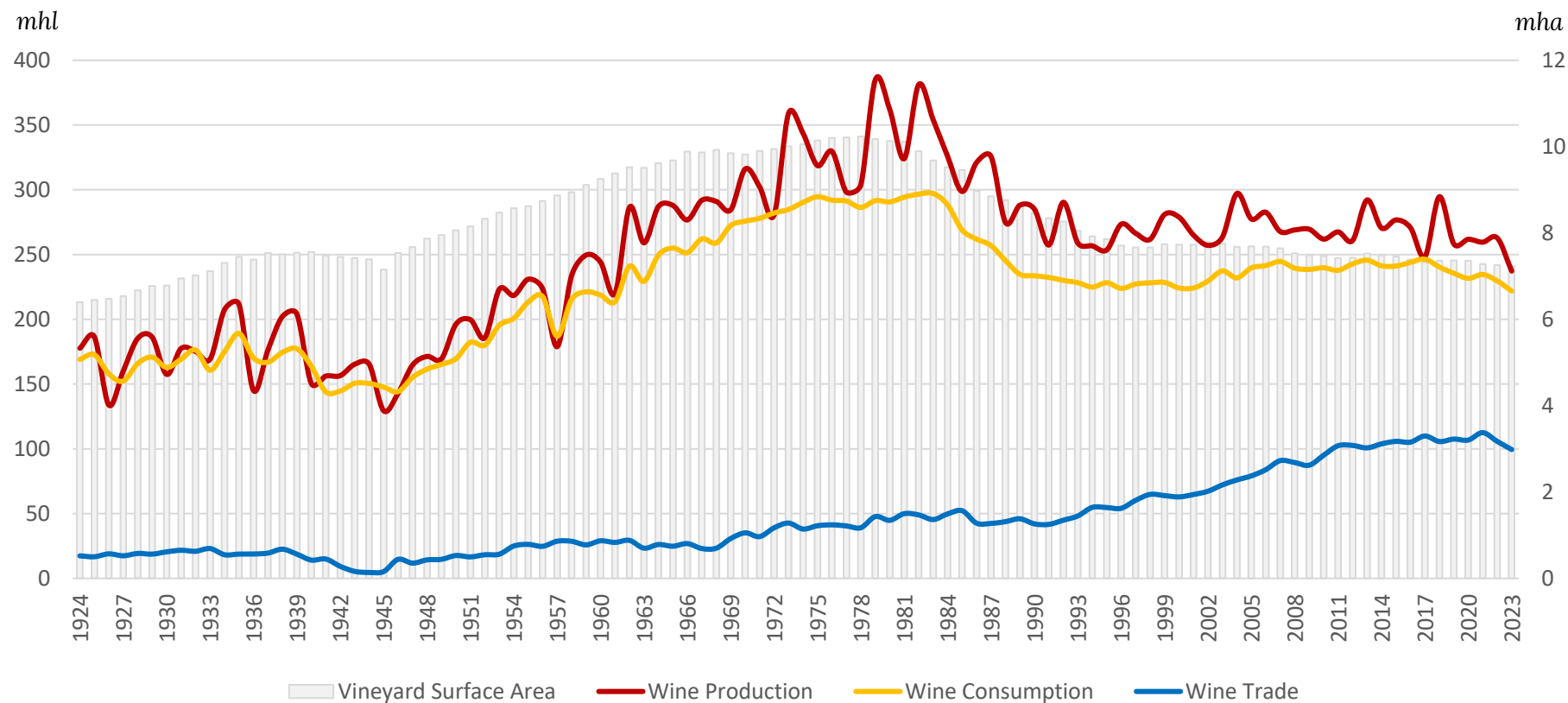




Conclusions



World Vine and Wine Sector 1924-2023





Key Takeaways



Change is a constant



The wine sector is highly **resilient**



Science and learning make a huge difference



Production and **consumption** are in constant evolution



The impacts of **climate change** are accumulating



International trade is integral to the sector



The wine sector is a **long-term** sector



INTERNATIONAL ORGANISATION OF VINE AND WINE

2024 WORLD WINE PRODUCTION OUTLOOK

OIV Conference

Giorgio Delgrosso, Head of Statistics Dept.
29 November 2024

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World Wine Production Outlook

First Estimates 2024

1. Southern Hemisphere

2. Northern Hemisphere

- European Union
- Outside European Union

3. World Total



Southern Hemisphere





Smallest in 20 Years



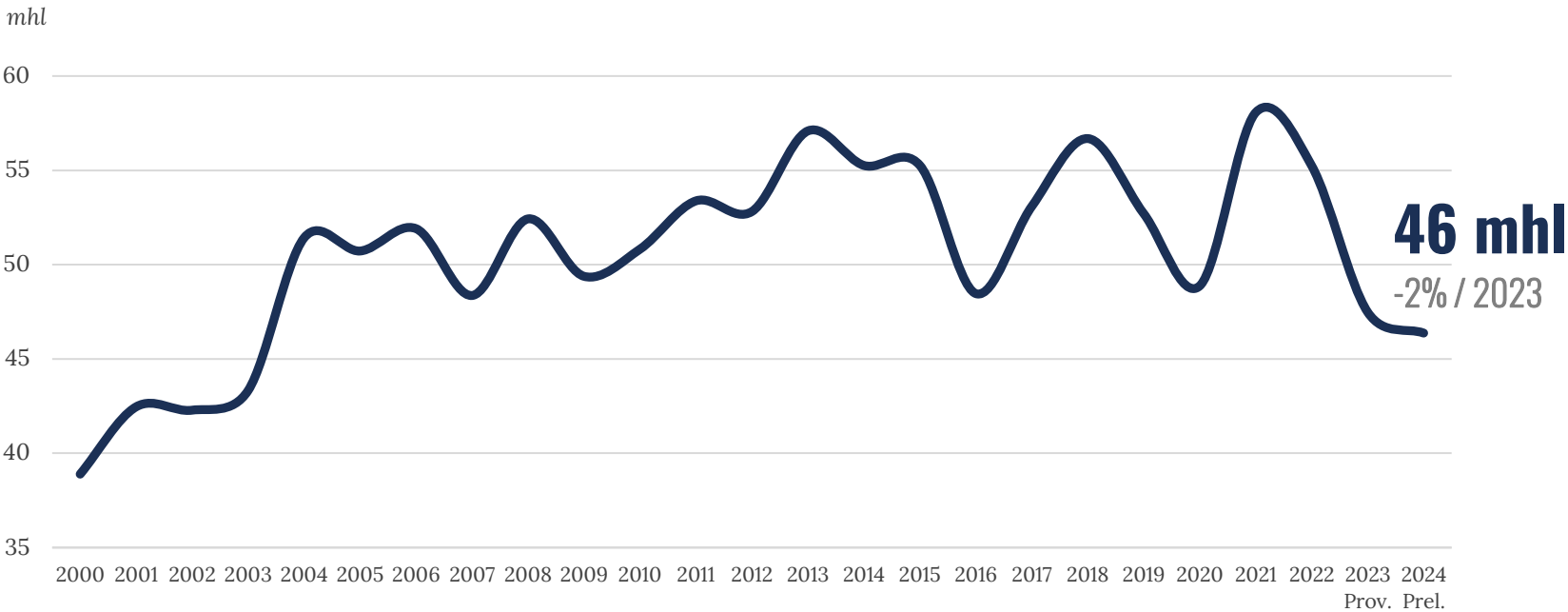
Climatic Events



20% World Total

2024 Wine Production Outlook

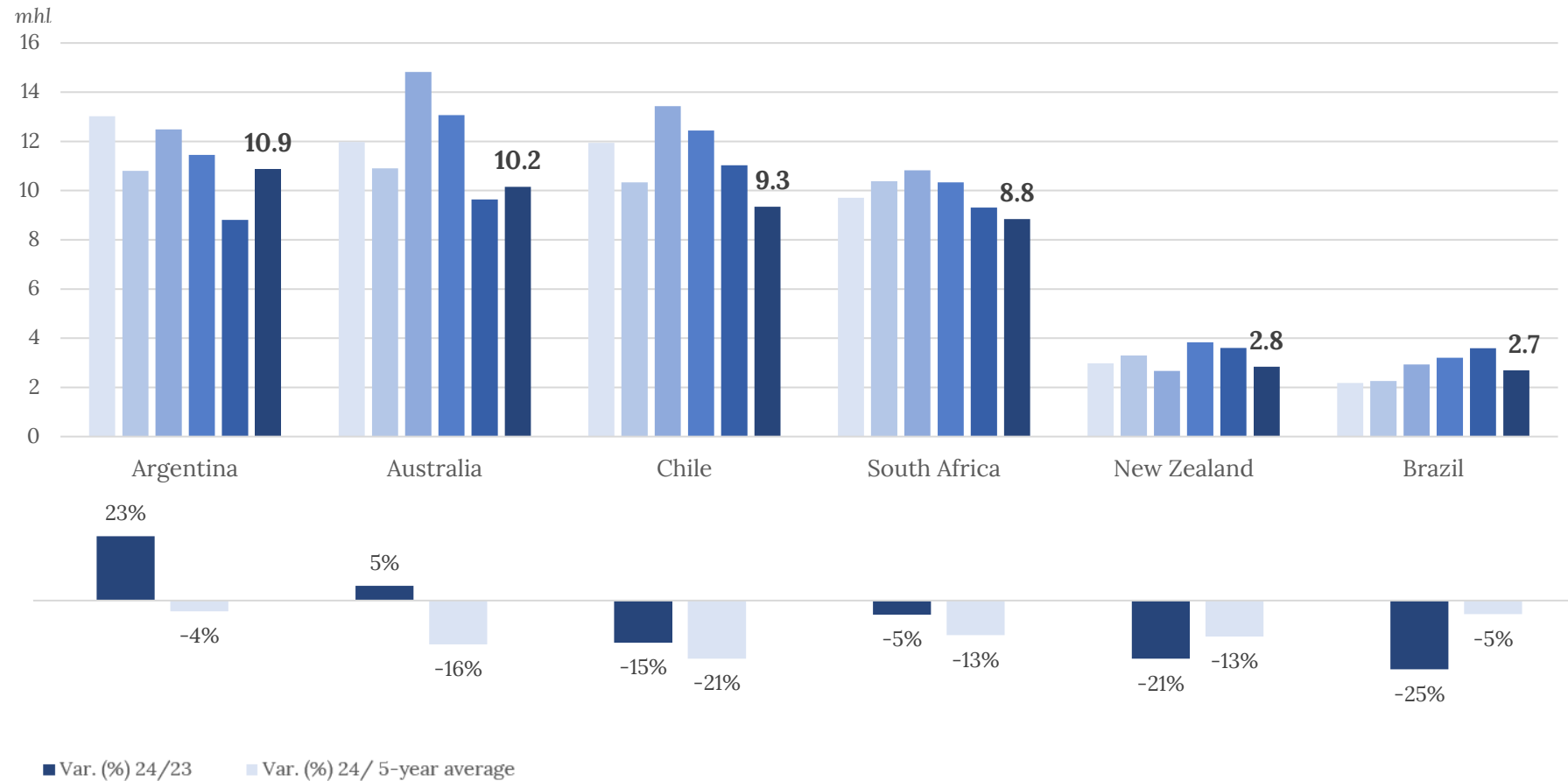
Southern Hemisphere - Wine Production 2000-2024





2024 Wine Production Outlook

Southern Hemisphere - Major Wine Producers





Northern Hemisphere



Smaller than 2017



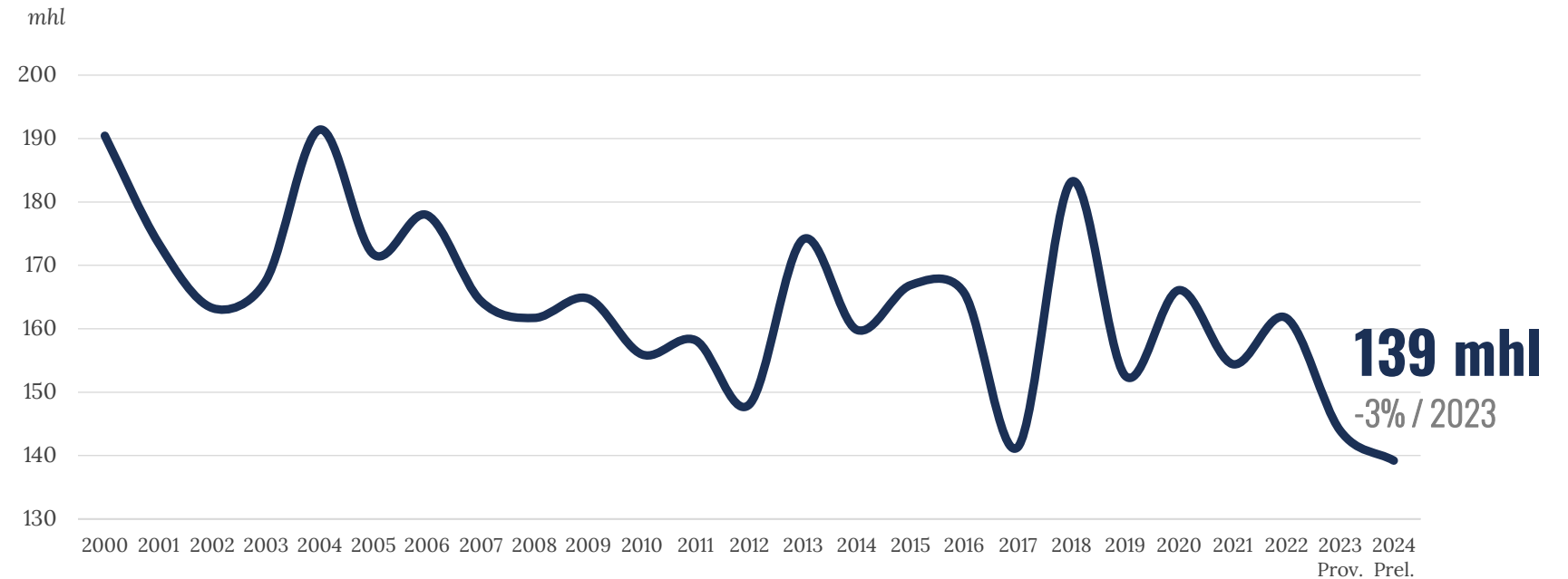
Climatic Events



60% Global share

2024 Wine Production Outlook

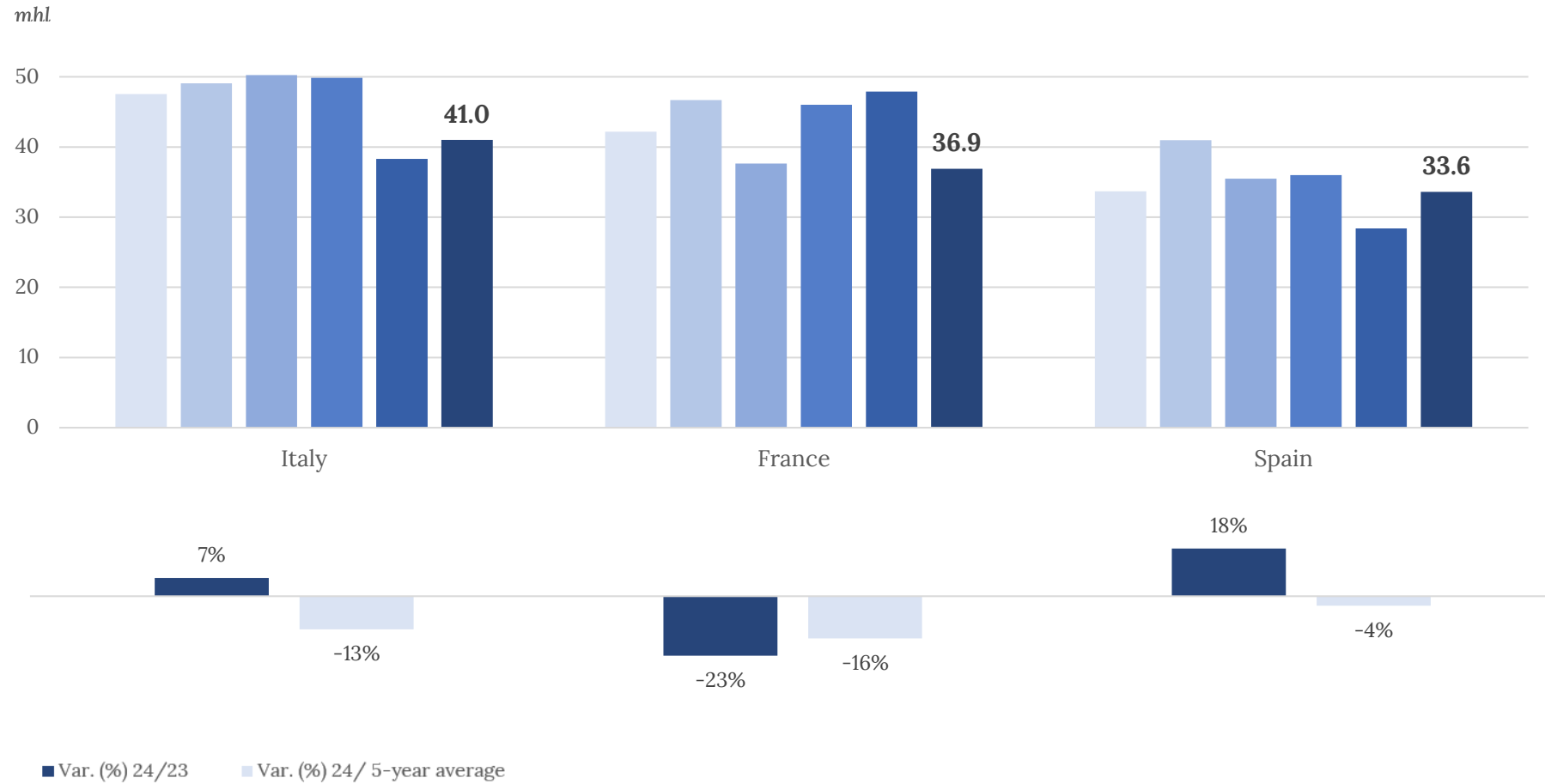
EU27 - Wine Production 2000-2024





2024 Wine Production Outlook

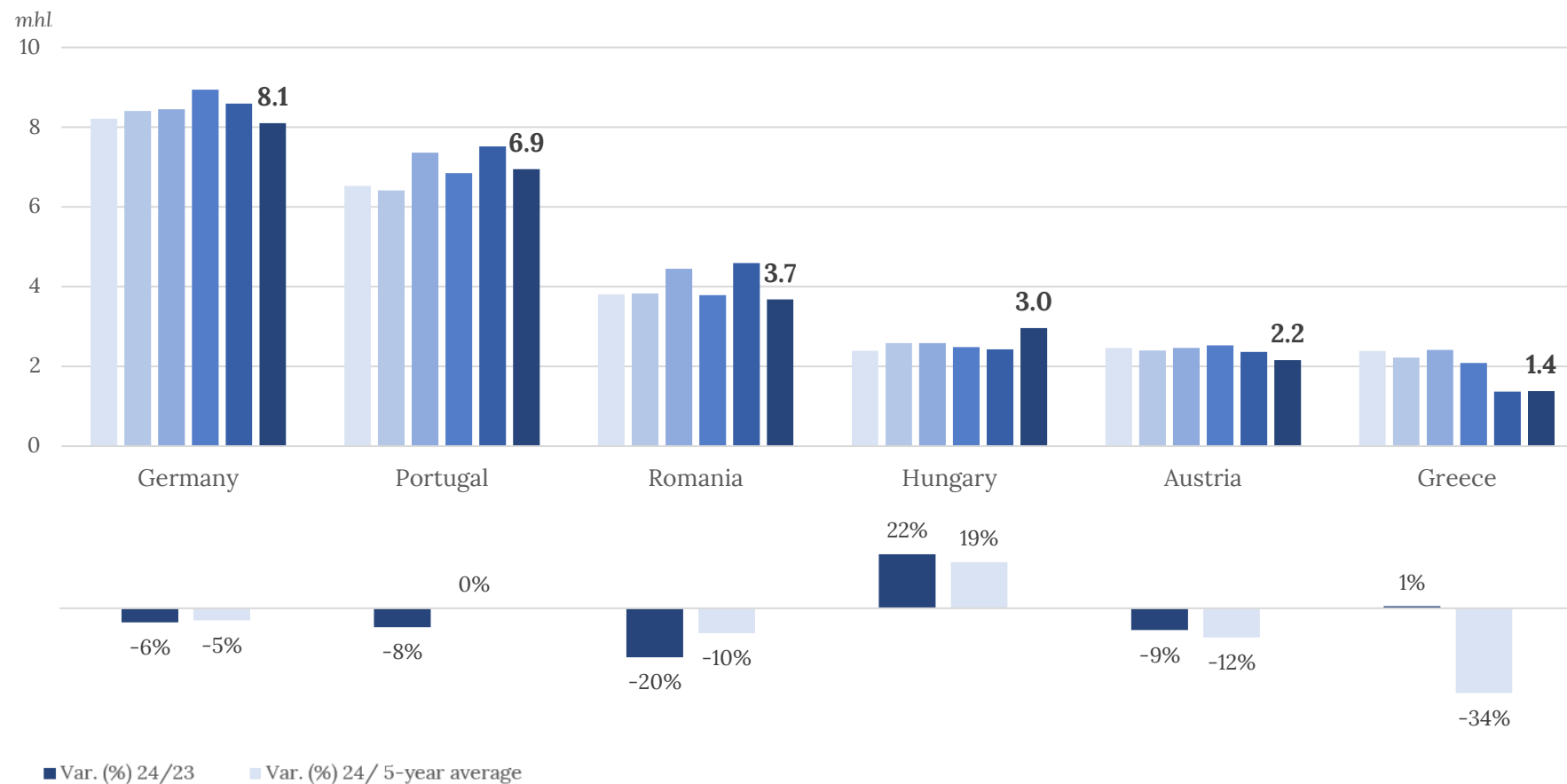
European Union – Major Wine Producers





2024 Wine Production Outlook

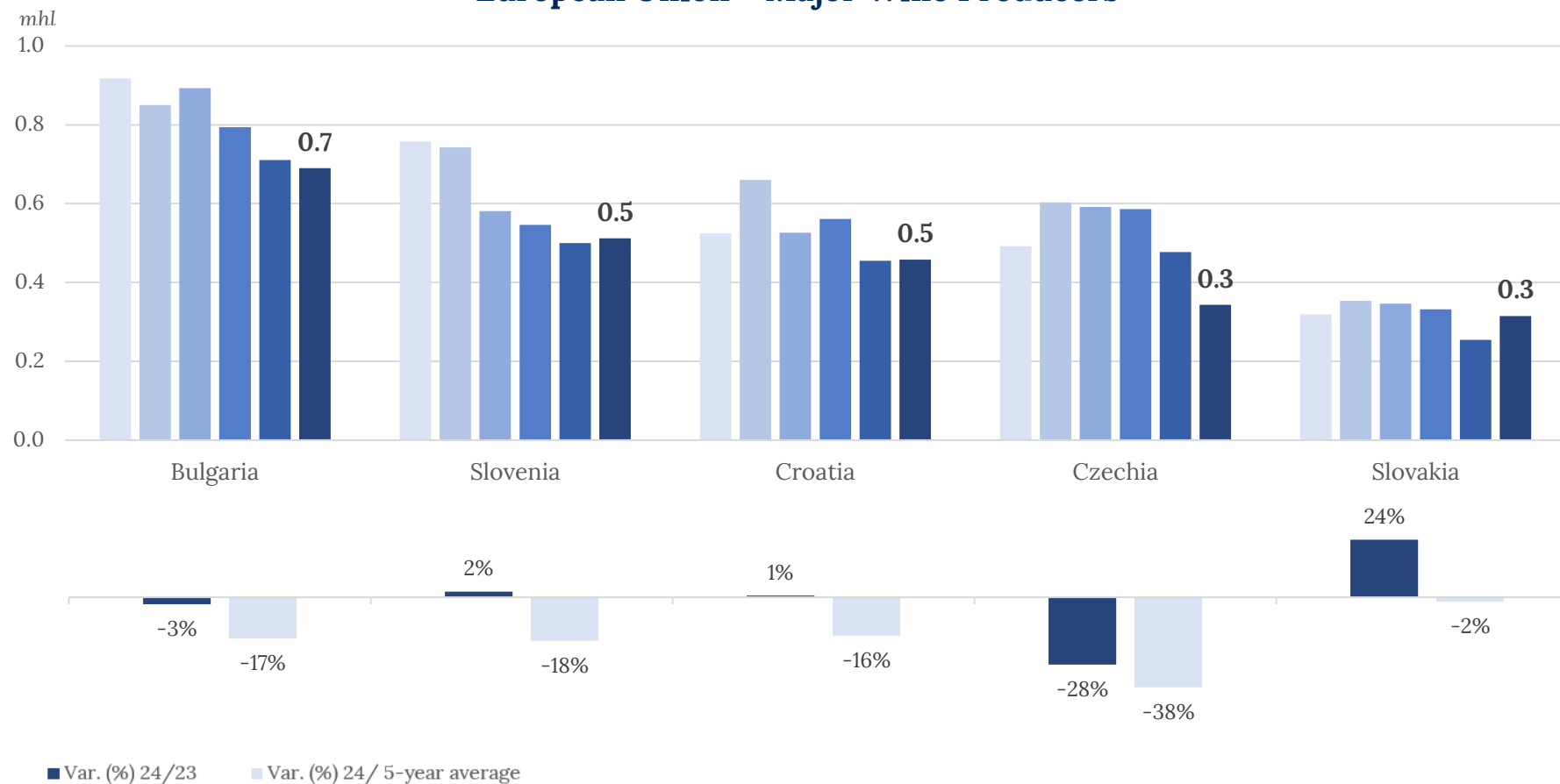
European Union – Major Wine Producers





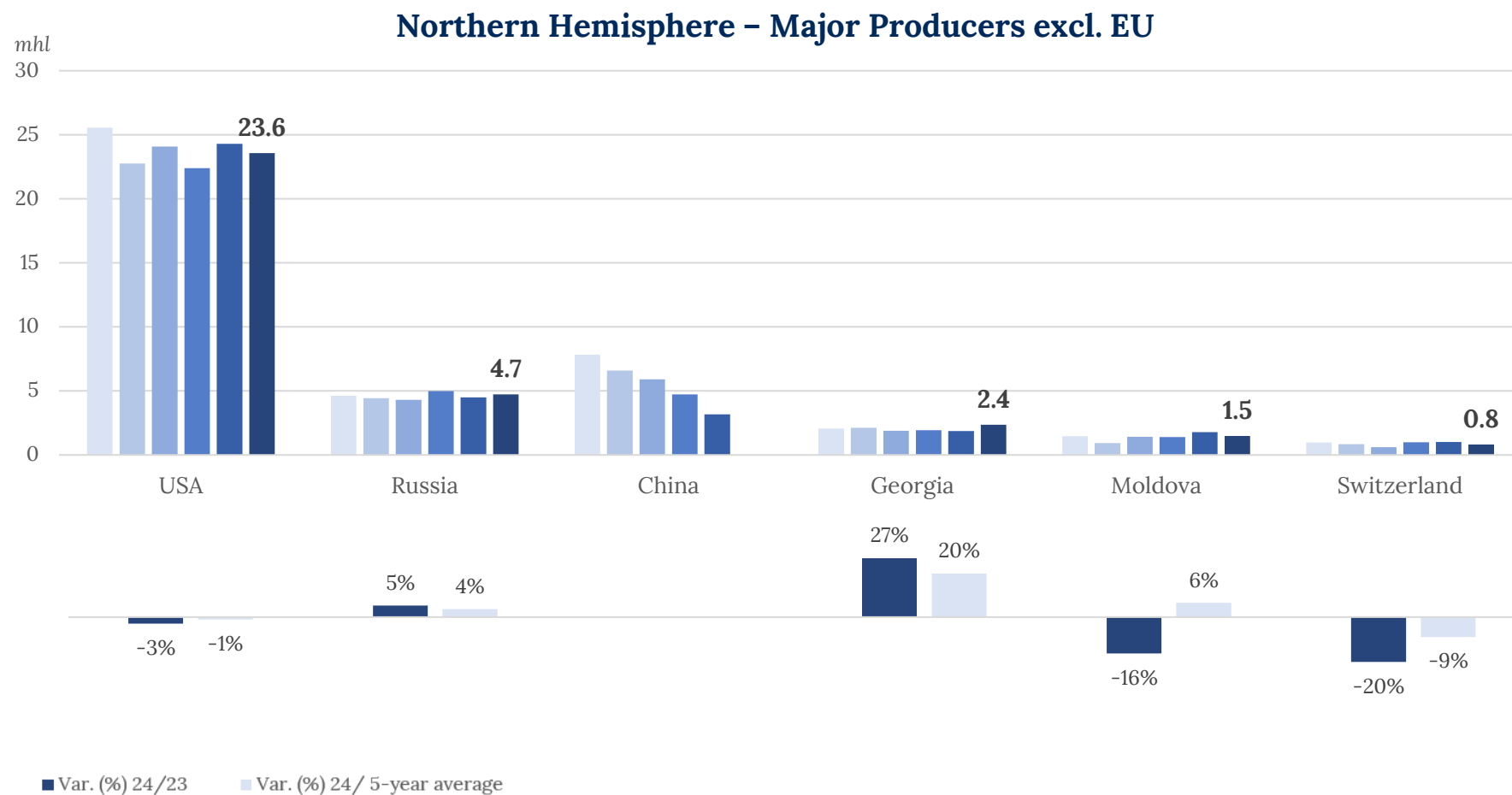
2024 Wine Production Outlook

European Union – Major Wine Producers





2024 Wine Production Outlook





World Wine Production 2024

A preliminary estimate



Historical Low



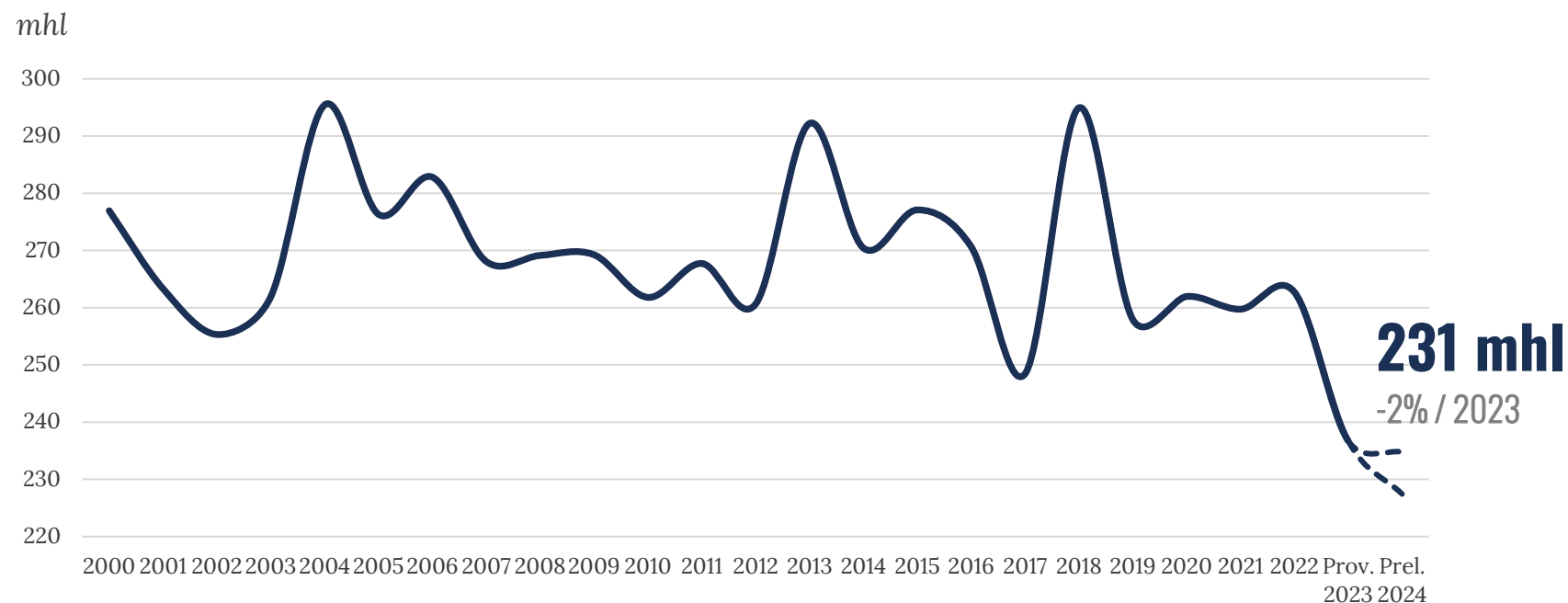
Climate Change



Market Balance

2024 Wine Production Outlook

World Wine Production





INTERNATIONAL ORGANISATION OF VINE AND WINE

2025-2029 OIV STRATEGIC PLAN

OIV Press Conference

John Barker, OIV Director General

29 November 2024

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Meeting global challenges

A highly resilient sector

Better quality

More markets

Cultural asset

Scientific expertise

Sustainability leader


Capacity to innovate

A photograph of a vineyard with rows of grapevines in the foreground and rolling hills in the background under a clear sky.

Climate change and
sustainability

A photograph showing two hands clinking wine glasses filled with white wine. The background is blurred, showing other people at a table.

Changing patterns
of consumption

A photograph of a wine glass on a table, with other glasses and a bottle visible in the background.

Wine and
society

A photograph of several large wooden wine barrels in a cellar, with light filtering through the openings at the top.

Uncertain trading
environment

The path forward

Strategic Plan 2025-2029

Position the OIV
for the future

Prioritise key challenges
and opportunities

Structures to
deliver priorities



OIV Priorities

1.

Coordinate approaches
to sustainability

2.

Promote resilient and
sustainable viticulture

3.

Adapt oenology and
production processes
to the future

4.

Support all
vitivinicultural products

5.

Simplify
international trade

6.

Contribute to consumer safety
and inform perspectives
on vine, wine and society

OIV 100 years 1924 – 2024

WELCOME TO THE
NEW CENTURY

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