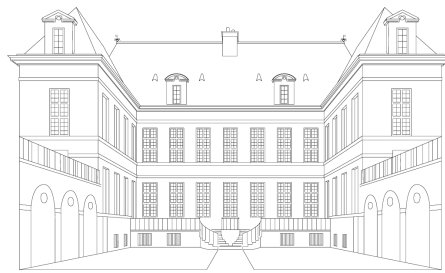




FOCUS OIV 2023

EVOLUTION OF WORLD WINE PRODUCTION AND CONSUMPTION BY COLOUR





OIV **100**

International Year of Vine and Wine 1924 • 2024



SUMMARY

This report has been prepared by the Statistics Department of the International Organisation of Vine and Wine (OIV) and provides an overview of the evolution of the world wine production and consumption by colour over the 2000-2021 period. In this section, the main insights and highlights of the study are presented.



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.



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Abbreviations:
mhl: million hectolitres



INTRODUCTION

Over the past decades, the world wine sector has seen an overall positive trend of production and consumption of white and rosé wines, while red wines have decreased. This structural shift can be mainly attributed to overall changes in consumer preferences.

This report aims to better understand this phenomenon by providing an overview of the evolution of production and consumption of wine (including both still and sparkling), broken down by the three major colour categories: red, white, and rosé. Such comprehensive data on demand and supply by colour constitute a good basis for making further and more detailed studies in the future.

The report is structured into three main chapters. The first chapter introduces the classification of wines by colour and outlines the main data sources as well as the estimation methods used. The second and third chapters provide an analysis of production and consumption data from 2000 to 2021. These chapters examine the world evolution and geographical distribution of wine by colour, offer country-level comparisons, and identify the major producing and consuming countries.





1 • DEFINITIONS, DATA SOURCES AND ESTIMATION METHODS

This chapter begins with a description of the classification of wines by colour, followed by an explanation of the methods used for data collection and estimation.

1.1 • Classification of wines by colour

The OIV has a general definition for wine¹, but no specific definition for wine colours, which can be described according to the grape varieties and production methods, or by colour determination via analytical methods.

Red wine is obtained from red grapes and is primarily produced through maceration and alcoholic fermentation of whole or crushed grape berries. The maceration process consists of a certain contact period with grape skins which allows colouration of the must and the subsequent wine after alcoholic fermentation. Regarding white wine, the main production method consists of pressing the grapes and fermentation without the skins. An exception is the white wine produced with maceration², which is characterised by an orange-amber colour.

To produce rosé wines³ various methods can be used, including pressing as in the case of white wine, or maceration as in the case of red wine but for shorter periods. Blending red and white wine to obtain rosé wine is not permitted in many countries, although there are some exceptions.

All the other necessary and complementary oenological treatments used in wine production are listed in the OIV's International Code of Oenological Practices⁴.

Furthermore, the colour of the wine can be examined by determination of chromatic characteristics with analytical methods described in the OIV compendium⁵. These methods allow quantifying the colour of wine by different attributes or specific qualities of visual sensation.

1.2 • Data sources and estimation methods

Data on production and consumption by colour is collected for 27 countries, which include the largest producers and consumers in the world, over the period 2000-2021. The countries included in the dataset represent 93% of the world's wine production and 76% of wine consumption in 2021.

The main data sources are the following:

- Official data provided by OIV Member States through questionnaires;
- Official reports published by governmental or intergovernmental agencies;
- Reports published by organisations representing the wine sector or the agricultural sector;
- Private data providers;
- Specialised press and technical journals.

It should be noted that in case of missing data, estimation techniques such as interpolation have been employed. In the case of world totals, estimates are based on the information available on the countries included in the study.

Overall, obtaining precise information on white and rosé wine has been particularly challenging. The main difficulty related to white wine is that it comprises wines that are destined for either elaboration (as in the case of sparkling wine) or transformation (e.g. distillation, etc.); in certain cases aggregation can be quite complicated and lead to discrepancies. For what concerns rosé wine, the main problem is a lack of a clear definition and therefore for many countries this category is included in red wine⁶.

¹ <https://www.oiv.int/standards/international-code-of-oenological-practices/part-i-definitions/wines/basic-definition>

² <https://www.oiv.int/standards/international-code-of-oenological-practices/part-i-definitions/special-wines/white-wine-with-maceration>

³ More information for rosé wine can be found in the 2015 OIV Thematic Focus on Rosé Wines, available here: https://www.oiv.int/sites/default/files/2022-09/focus-2015-les-vins-roses-en_0.pdf

⁴ <https://www.oiv.int/standards/international-code-of-oenological-practices>

⁵ <https://www.oiv.int/standards/compendium-of-international-methods-of-wine-and-must-analysis>

⁶ In European Union regulations, for instance, the economic data available under the reporting obligations do not always distinguish between rosé and red wine.



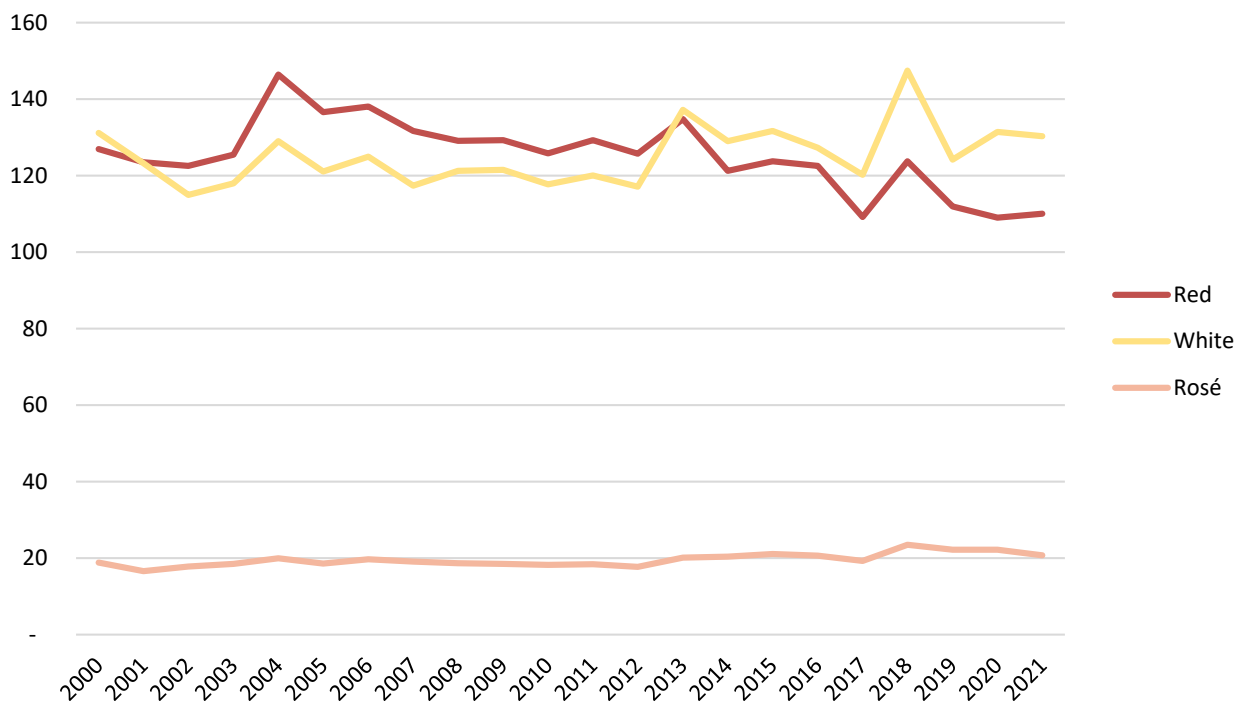
2 • PRODUCTION

This chapter presents wine production data with a focus on the evolution over the 2000-2021 period. It is divided into two sub-sections. First, the evolution of global wine production by colour and its geographical distribution is presented. The second part of the chapter provides an overview of the evolution of wine production with the breakdown by colour of major wine-producing countries.

2.1 • Evolution and distribution of global wine production by colour

Figure 1 depicts the trends by colour in world wine production over the period 2000-2021. In 2021, the global white wine production is estimated at 130 mhl, representing 50% of the total production. Red wine, with 110 mhl, accounts for 42% and the remaining 8% is rosé wine, estimated at 21 mhl. In 2021, red wine production has declined by 25% since its peak in 2004, while white wine production has increased by 13% since its lowest level in 2002. As can be seen in Figure 1, the production of white wine has exceeded that of red wine starting from 2013. One of the main driving forces behind this increase is the boom in the production of sparkling wine, as described in the 2020 OIV Thematic Focus on sparkling wine⁷.

Figure 1. Evolution of global wine production by colour (mhl), 2000-2021

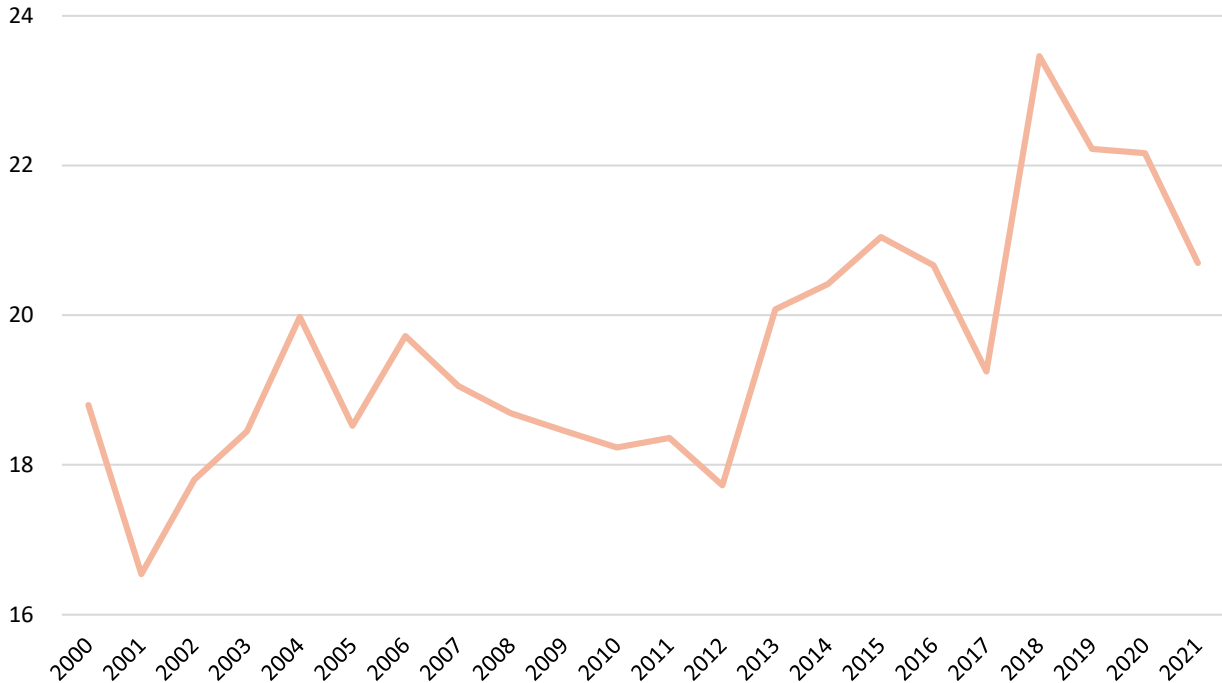


As shown in Figure 2 (next page), rosé wine production has seen an increase of 25% between 2001 and 2021.

⁷ <https://www.oiv.int/sites/default/files/2022-09/oiv-sparkling-focus-2020.pdf>



Figure 2. World wine production of rosé (mhl), 2000-2021



To compare the relative weight of the three colours over time, the averages for the periods 2000-2004 and 2017-2021 are shown in Figure 3 and Figure 4, respectively. At the beginning of the century, red wines accounted on average for 47.6% of the total production, white wines 45.6% and rosé wines 6.8%.

In contrast, for the 2017-2021 average, white wine and rosé wine increased their share to 49.3% and 8.1% respectively, while the share of red wine dropped to 42.6%.

Figure 3. Breakdown of wine production by colour (average 2000-2004)

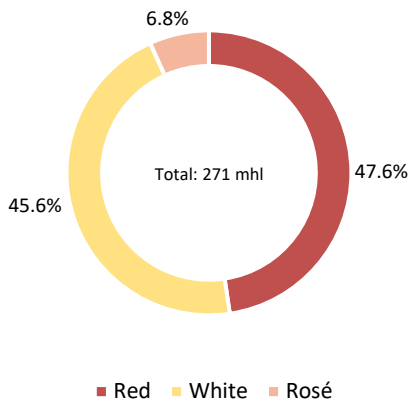
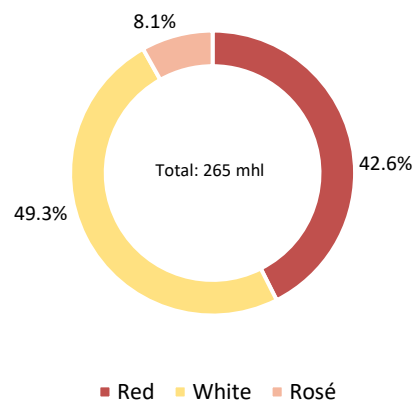


Figure 4. Breakdown of wine production by colour (average 2017-2021)





2.1.1 • Red wine

Figure 5 shows the average breakdown of the global red wine production by country for the three following periods: 2000–2006, 2007–2013, and 2014–2021. As can be seen from the graph, there are contrasting trends among the major red wine producers.

France, for example, has reduced its average production share from 21.9% during the period 2000–2006 to 13.9% during 2014–2021, while Italy’s share has declined by 1.6 percentage points over the same period.

All the other countries in the top ten have increased their relative shares of red wine in recent years, except for China whose production share increased during the period 2007–2013 but returned to the 2000–2006 level in recent years due to a drop in overall wine production. It is worth highlighting the significant increases in the relative shares of Spain, Argentina, and Chile, which together account for more than 25% of the global red wine production nowadays.

Figure 5. Breakdown of global red wine production by country

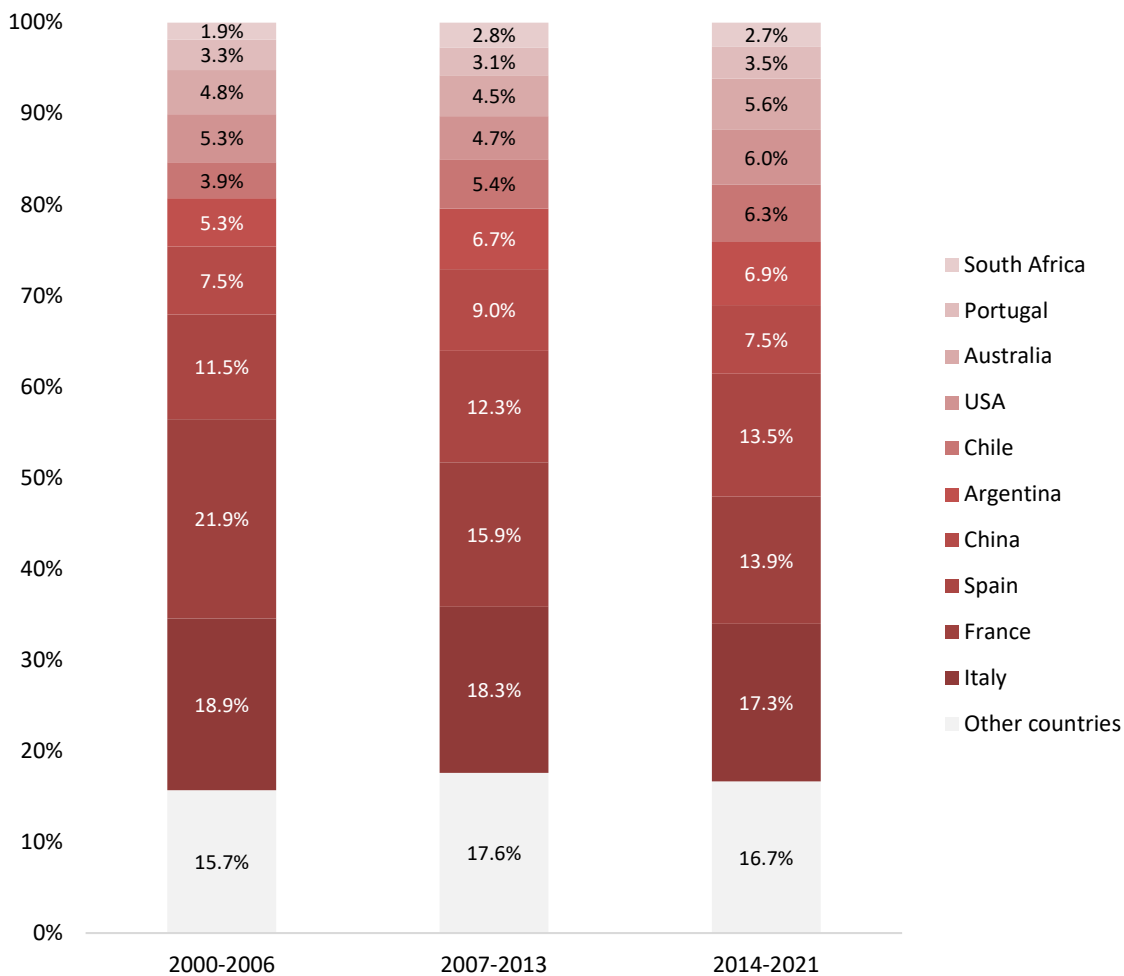




Figure 6 shows the ranking of major red wine producers in 2021 in terms of absolute production volume. Italy (19.8 mhl), Spain (14.4 mhl), and France (12.2 mhl) are the three largest producers. Three Southern Hemisphere countries, notably Chile (8.5 mhl), Argentina (8.3 mhl), and Australia (8.2 mhl) follow with production volumes very close to each other. The USA (7.1 mhl), China (5.1 mhl), Portugal (4.5 mhl), and South Africa (3.4 mhl) complete the top ten ranking.

Figure 6. Major red wine producing countries in 2021 (mhl)

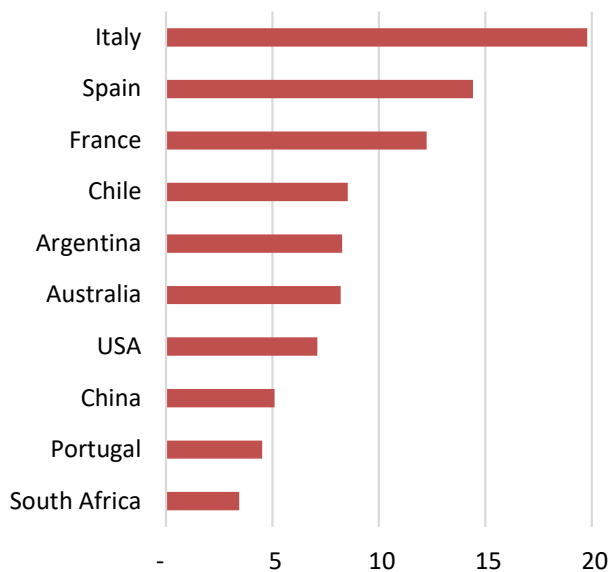
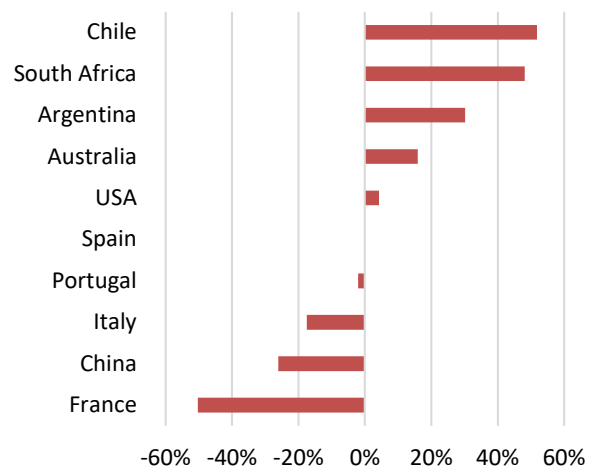


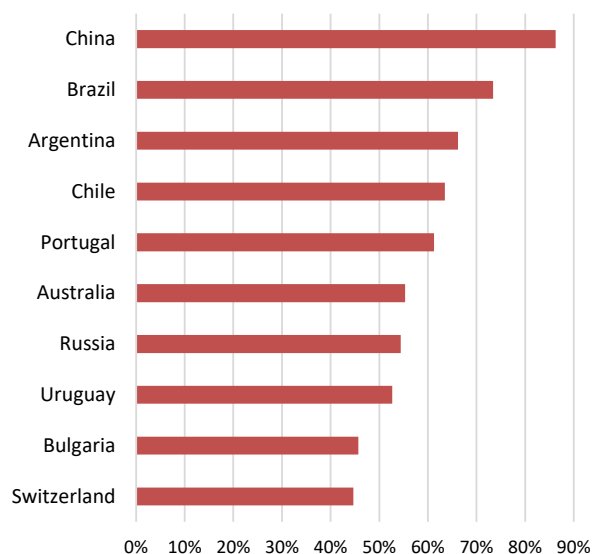
Figure 7 shows the growth rates of red wine production of the top ten producers between the period 2000-2004 and 2017-2021. All non-European countries demonstrate positive growth rates (except China). Chile (+52%) leads this ranking, followed by South Africa (+48%), Argentina (+30%), Australia (+16%) and the USA (+4%). In contrast, negative growth rates are observed across all major European red wine-producing countries. It is worth noting the sharp decline in France, which nowadays produces 50% less red wine than at the beginning of the century.

Figure 7. Growth rate of red wine production (2000-2004 vs 2017-2021) in major wine producing countries



In Figure 8, the ranking by percentage of red wine in total national production in 2021 is shown⁸. China leads by a remarkable margin with a share of 86.3%, followed by other four countries where red wine plays a dominant role: Brazil (73.4%), Argentina (66.2%), Chile (63.5%), and Portugal (61.3%). Italy, Spain, and France, despite being the top three producers in absolute terms, do not rank within the top ten countries in relative terms.

Figure 8. Countries with highest percentage of red wine in national wine production in 2021 producing countries



⁸ The ranking is based on countries for which information is available.



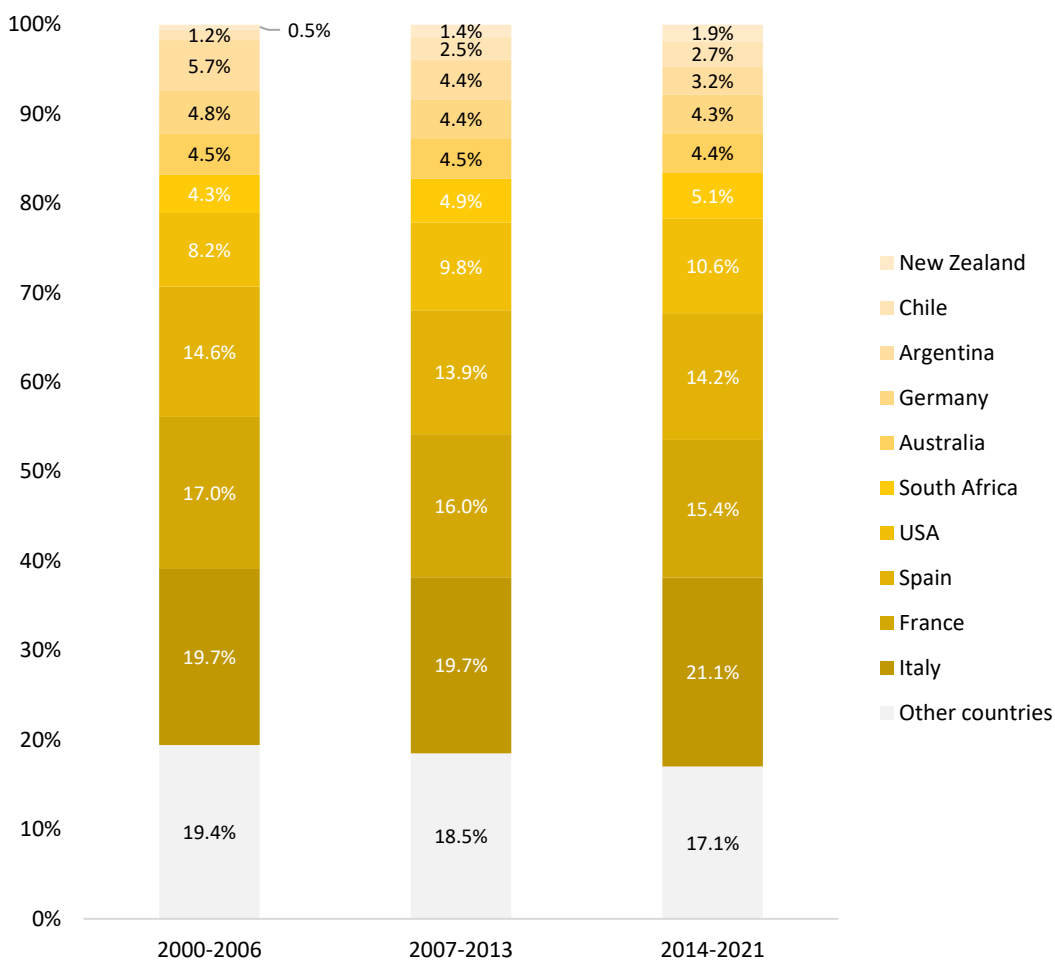
2.1.2 • White wine

According to the data presented in Figure 9, the relative shares of global white wine production by country have not seen very large variations over time, with the top five countries accounting for almost two-thirds of the world's production across all three time periods.

Italy's production share was unchanged between 2000-2006 and 2007-2013, but it increased by 1.4 percentage points between 2007-2013 and 2014-2021. France and Spain, on the other hand, have slightly decreased their production shares from 2000-2006 to 2014-2021.

Among the top ten countries, the USA has experienced the largest increase in production share, rising by 2.4 percentage points between 2000-2006 and 2014-2021. Similarly, countries such as South Africa, Chile and New Zealand record very positive trends. Argentina on the contrary shows a consistent downward trend, down by 2.5 percentage points between the first and third periods. Germany and Australia are among the more stable producers in terms of relative share at the world level, with minor fluctuations across the three periods.

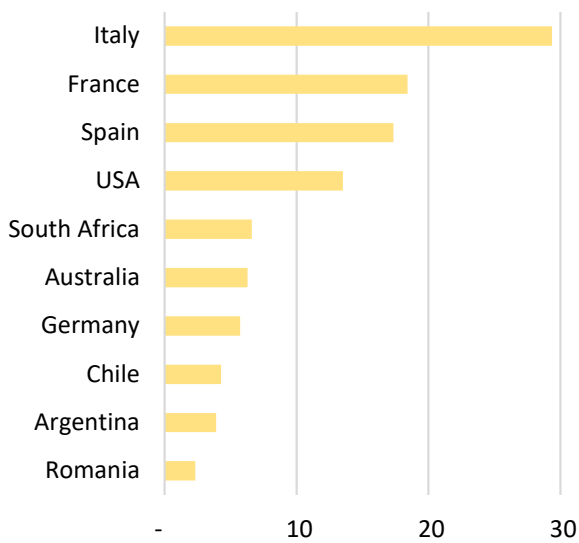
Figure 9. Breakdown of global white wine production by country





As shown in Figure 10, the top three countries by production volume of white wine in 2021 are Italy (29.4 mhl), France (18.4 mhl) and Spain (17.4 mhl). The USA follow with 13.5 mhl. The top ten is completed by South Africa (6.6 mhl), Australia (6.3 mhl), Germany (5.7 mhl), Chile (4.3 mhl), Argentina (3.9 mhl) and Romania (2.3 mhl).

Figure 10. Major white wine producing countries in 2021 (mhl)



In terms of growth rates of white wine production for the top ten countries (Figure 11), Chile stands out with the most substantial growth rate between the period 2000-2004 and 2017-2021, by almost tripling its white wine production. It is followed by the USA (+39.6%), Italy (+17.9%), South Africa (+16.1%), Australia (+8.8%), and Spain (+1.2%). In contrast, Argentina (-47.1%), Romania (-24.7%), Germany (-9.0%) and France (-3.5%) experienced negative growth rates.

Figure 11. Growth rate of white wine production (2000-2004 vs 2017-2021) in major wine producing countries

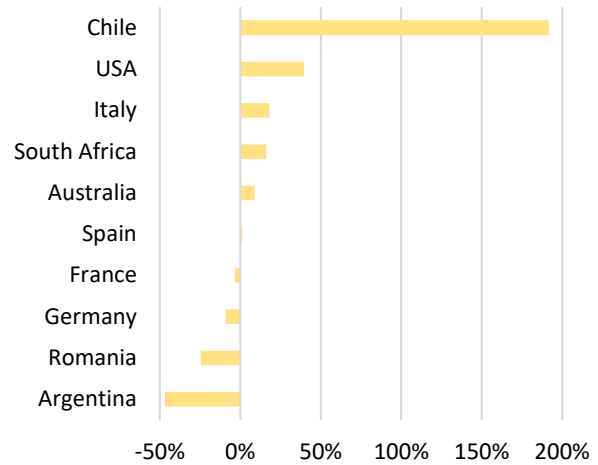
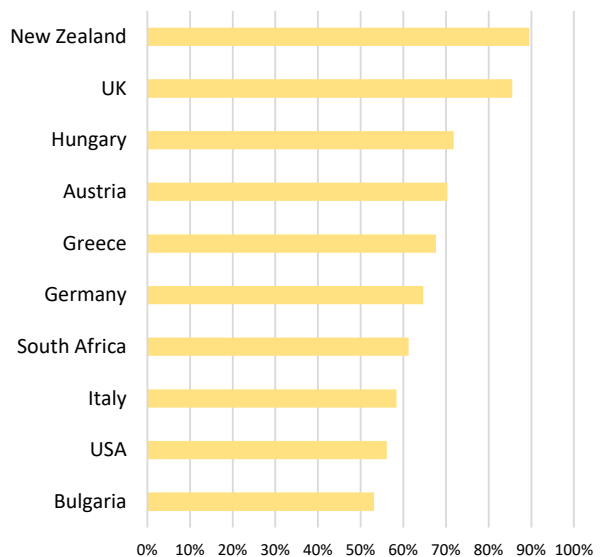


Figure 12 shows a ranking based on the share of white wine in total national production in 2021⁹. New Zealand has the highest proportion (89.6%). It is followed by five European countries, notably the UK (85.5%), Hungary (71.8%), Austria (70.3%), Greece (67.7%), and Germany (64.7%). The top 10 is completed by South Africa (61.2%), Italy (58.4%), the USA (56.1%), and Bulgaria (53.2%).

Figure 12. Countries with highest percentage of white wine in national wine production in 2021



⁹ Ibid.



2.1.3 • Rosé wine

The global production of rosé wine has significantly increased over the period 2000-2021. However, the relative shares of the top-producing countries have seen significant variations, especially for what concerns the two largest producers.

France has increased its share by 7.5 percentage points between 2000-2006 and 2014-2021, becoming the first rosé wine producer in the world with a share of 32% in recent years.

Conversely, Spain has experienced a significant decrease in its production share by 8 percentage points over the same period. The production shares of the USA, Italy, Germany and Argentina show similar trends, with a drop between 2000-2006 and 2014-2021. It is worth highlighting the growth of South Africa, Chile and Portugal, increasing respectively by 2.4, 2.0 and 0.2 percentage points between 2000-2006 and 2014-2021.

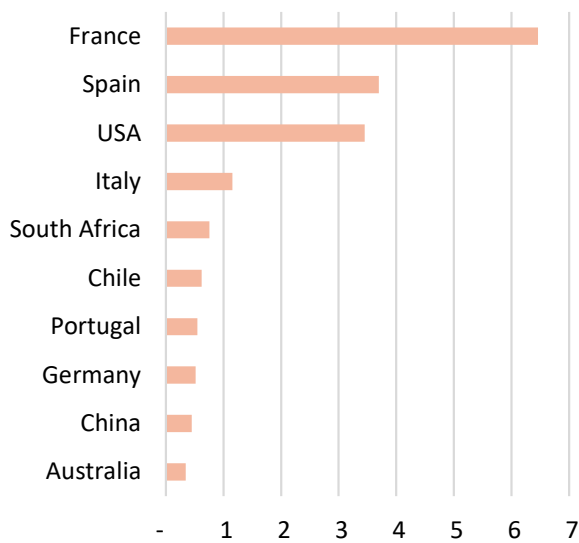
Figure 13. Breakdown of global rosé wine production by country





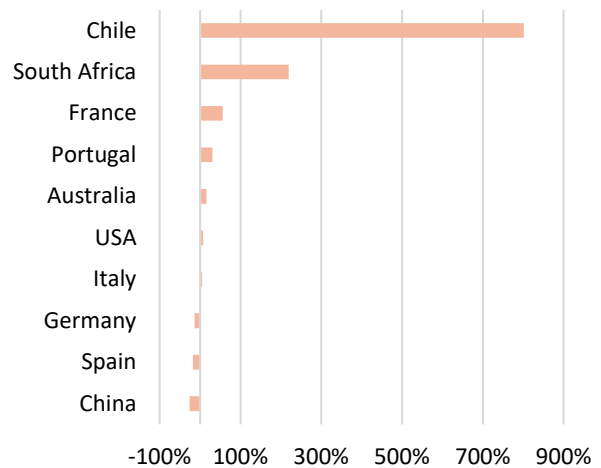
The ranking in absolute terms (Figure 14) reveals that the countries in the Northern Hemisphere are the ones that contributed the most to the production of rosé wine in 2021. Among the top three producers, we find France (6.5 mhl), followed by Spain (3.7 mhl) and the USA (3.4 mhl). These three countries together account for more than two-thirds of the global production.

Figure 14. Major rosé wine producing countries in 2021 (mhl)



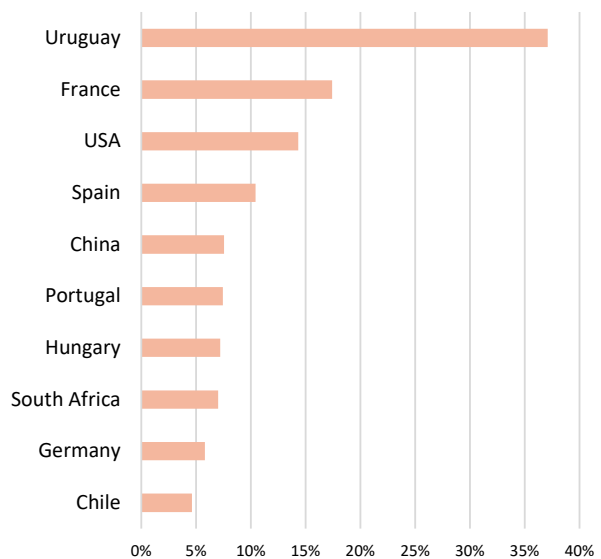
As shown in Figure 15, in terms of growth rates between the period 2000-2004 and 2017-2021, the ranking of the top ten rosé wine producers is once again dominated by Southern Hemisphere countries. It is worth highlighting the significant growth of Chile and South Africa. Positive growth, although to a lesser extent, is also recorded in France, Portugal, Australia, the USA and Italy. Three countries - Germany, Spain and China - have decreased their production of rosé with respect to the beginning of the century.

Figure 15. Growth rate of rosé wine production (2000-2004 vs 2017-2021) in major wine-producing countries



Moving to the ranking of the share of rosé wine in total national production¹⁰ in 2021 (Figure 16), Uruguay (37.1%) has a significantly higher percentage of rosé than all the other countries included in this study. France (17.4%), the USA (14.3%), and Spain (10.4%) are the only other countries where rosé accounts for at least 10% of the total production of wine. The ranking is completed by China (8.0%), Portugal (7.6%), Hungary (7.4%), South Africa (7.0%), Germany (5.8%), and Chile (4.6%).

Figure 16. Countries with the highest percentage of rosé wine in national wine production in 2021



¹⁰ Ibid.



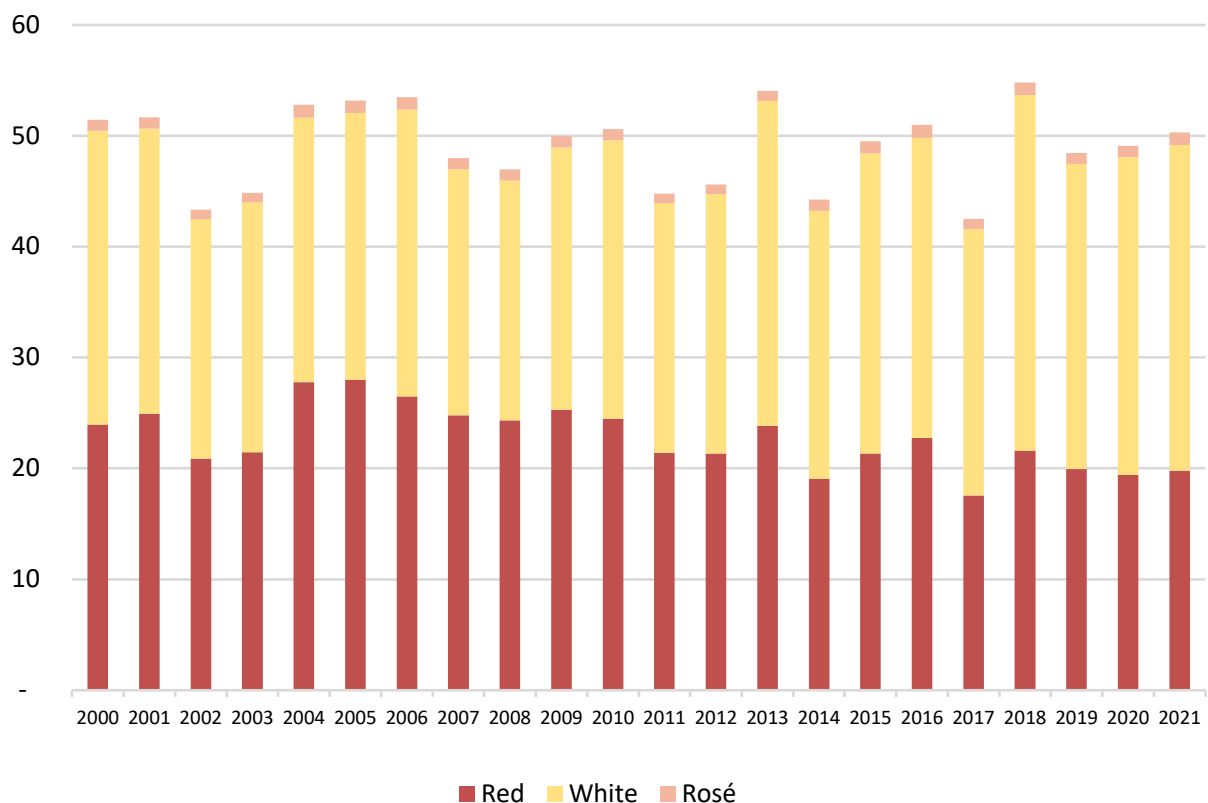
2.2 • Major producing countries

In this sub-section, the top ten wine-producing countries in 2021 and their evolution of wine production by colour since 2000 are analysed.

Italy

In 2021, Italy is the world's largest wine producer, accounting for 19.2% of global wine production with 50 mhl (Figure 17). The breakdown by colour indicates that red wine production is estimated at 19.8 mhl, white wine production at 29.4 mhl, and rosé wine production at 1.2 mhl in 2021. Since the beginning of the century there has been a consistent decrease in red wine production, which used to account for about 50% of the total production and nowadays represents less than 40%. On the contrary, white production has gained more than 10 percentage points reaching a peak of 60% of the national production in recent years, notably driven by the global success of Prosecco. Rosé wine production shows a more stable path accounting for about 2% of the national production across the whole period.

Figure 17. Italy - Evolution of wine production by colour (mhl), 2000-2021

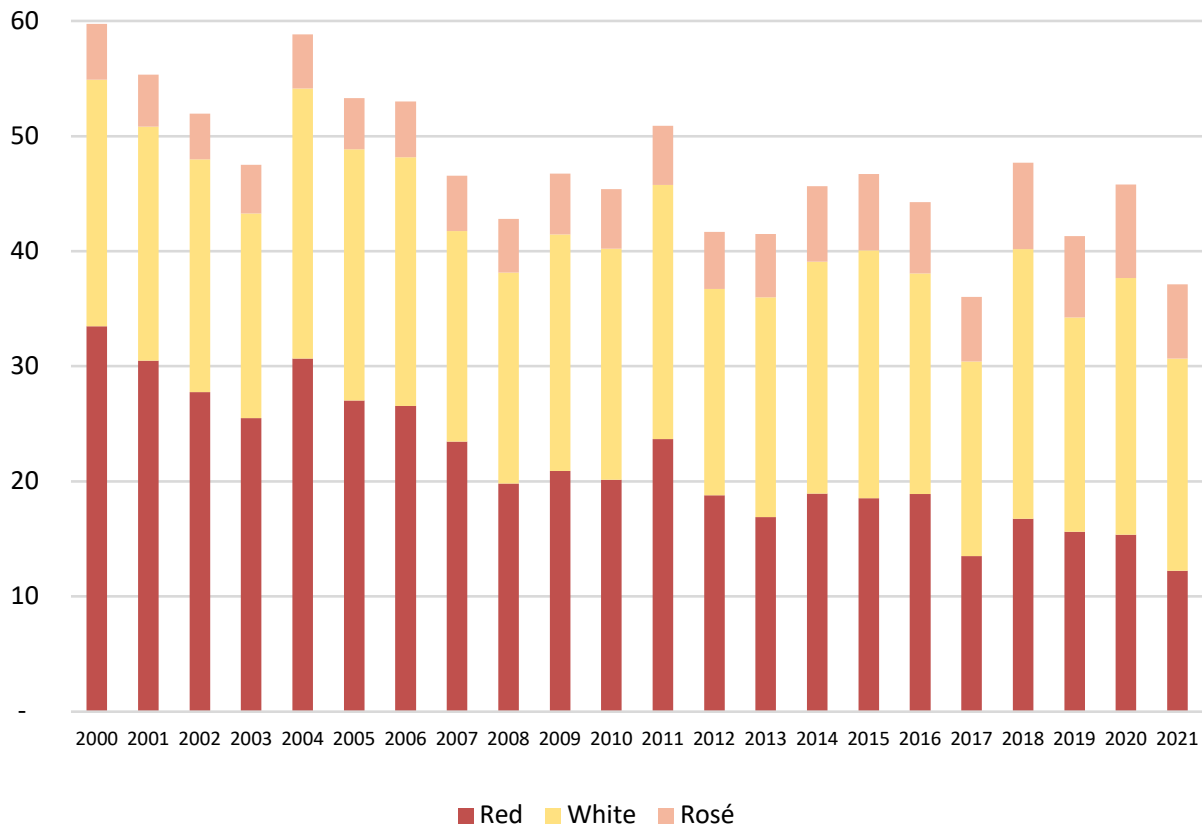




France

France (Figure 18) is the second-largest wine producer globally, even though its 2021 harvest is historically low (37.6 mhl). In 2021, the breakdown of wine production by colour is 12.2 mhl for red wine, 18.4 mhl for white wine, and 6.5 mhl for rosé wine. The total French wine production has significantly decreased since 2000. Red wine production has declined significantly both in absolute and in relative terms, from 33.5 mhl in 2000 (56% of the total) to 12.2 mhl in 2021 (33% of the total). In contrast, the evolution of white wine production shows a slight decline in terms of absolute volume but a strong increase in relative terms: if in 2000 it used to represent 36% of the total production, in 2021 it accounts for about 50%. It is also worth highlighting the rise of the production of rosé wine, which doubled its weight in the total production (from 8% at the beginning of the century to 17% in recent years). Rosé is the only wine colour that increased in absolute terms during the analysed period.

Figure 18. France - Evolution of wine production by colour (mhl), 2000-2021

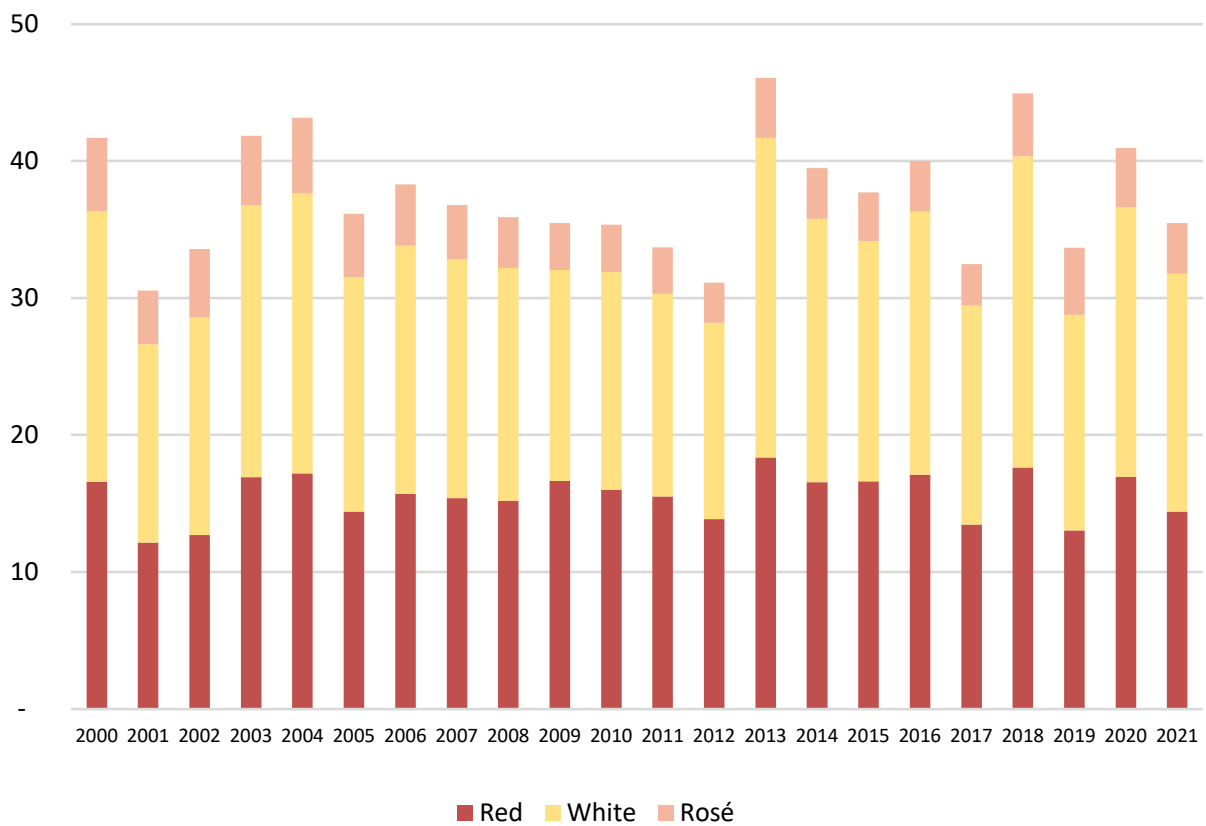




Spain

In 2021, Spain (Figure 19) ranks third in total wine production with an estimated production of 35 mhl. Out of this total, red wines account for 14.4 mhl, white wines for 17.4 mhl, and rosé wines for 3.7 mhl. Over the period 2000–2021, Spain’s total wine production has fluctuated between 30 mhl and 45 mhl, but the composition of the colours has remained relatively stable. Red wine accounted for 35% of all wine in 2000 compared to 37% in 2021; white wine changed from 47% in 2000 to 49% in 2021; and rosé wine changed from 13% in 2000 to 11% in 2021.

Figure 19. Spain - Evolution of wine production by colour (mhl), 2000-2021

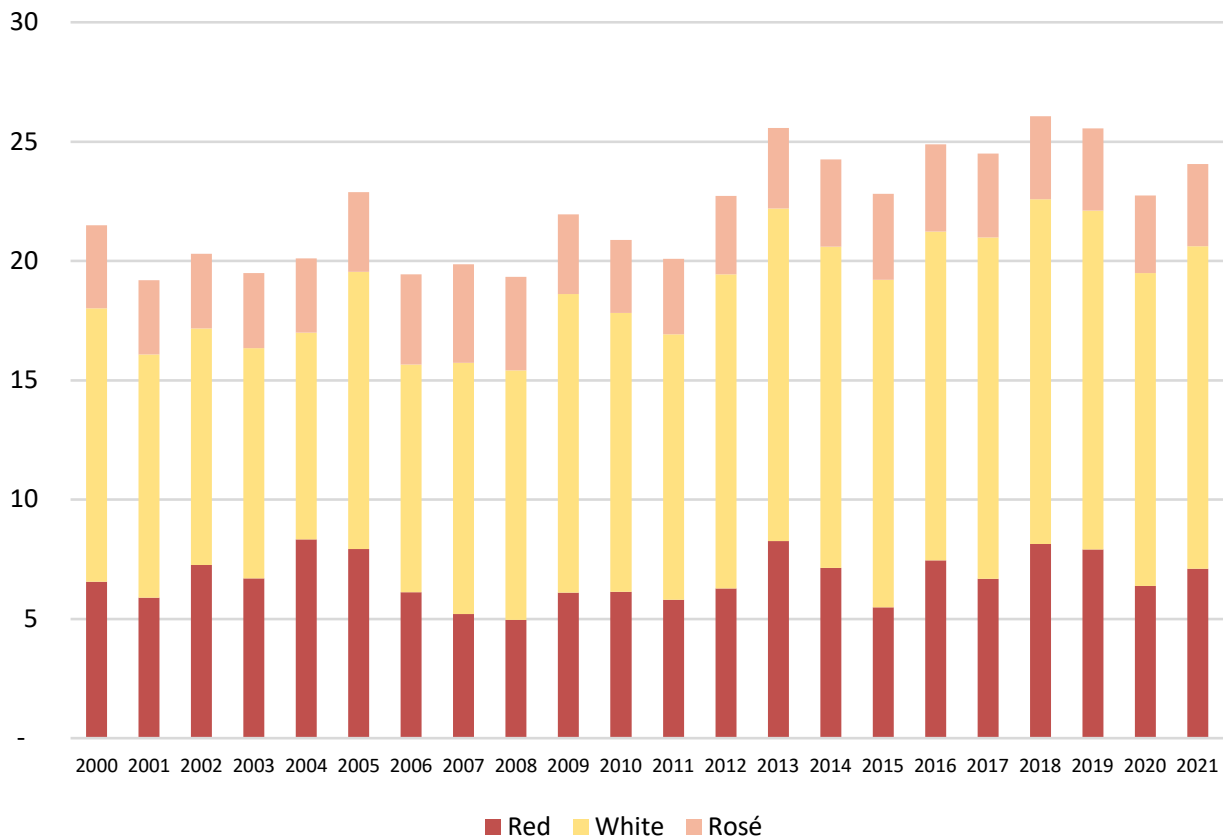




USA

The USA (Figure 20), the fourth producer at the global level, shows relatively stable growth for the three colours. Overall white wines hold the highest share of production, accounting for 50 to 60% of the total production during the 2000–2021 period. It is worth highlighting the important share of rosé wines, representing about 15% of the total production across the whole period.

Figure 20. USA - Evolution of wine production by colour (mhl), 2000–2021

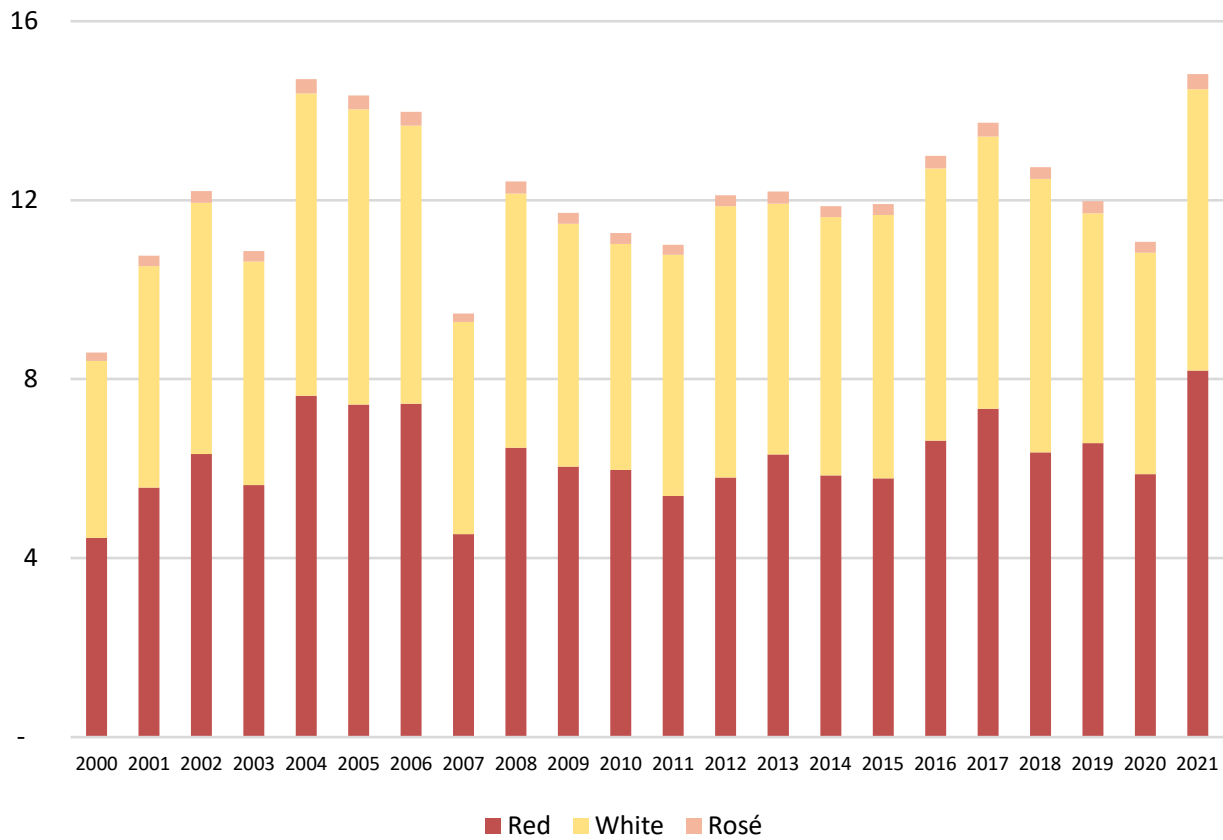




Australia

Australia (Figure 21) has maintained during the whole period 2000-2021 a relatively balanced wine production, which is evenly split between red (ranging between 48 and 54%) and white wines (ranging between 45 and 50%). Rosé wine production accounts on average for about 2% of the total.

Figure 21. Australia - Evolution of wine production by colour (mhl), 2000-2021

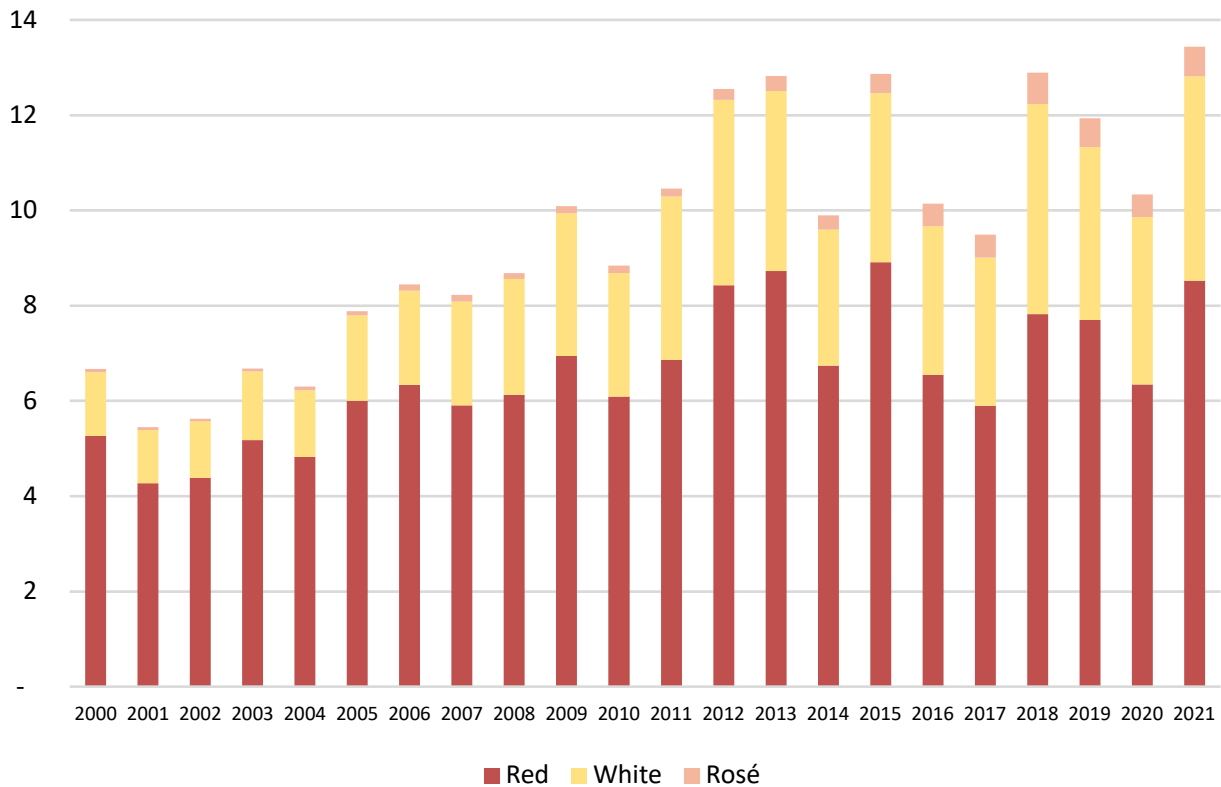




Chile

In Chile (Figure 22), total wine production has significantly expanded in the period 2000-2021. Therefore it is not a surprise that, in absolute terms, all three colours show sharp increases. The Chilean wine production has a larger proportion of red wine, even though its relative share has been shrinking from almost 80% at the beginning of the century to 60-65% in more recent years. White and rosé wines have seen strong growth during the period 2000-2021 and nowadays account for 30-35% and 5% respectively.

Figure 22. Chile - Evolution of wine production by colour (mhl), 2000-2021

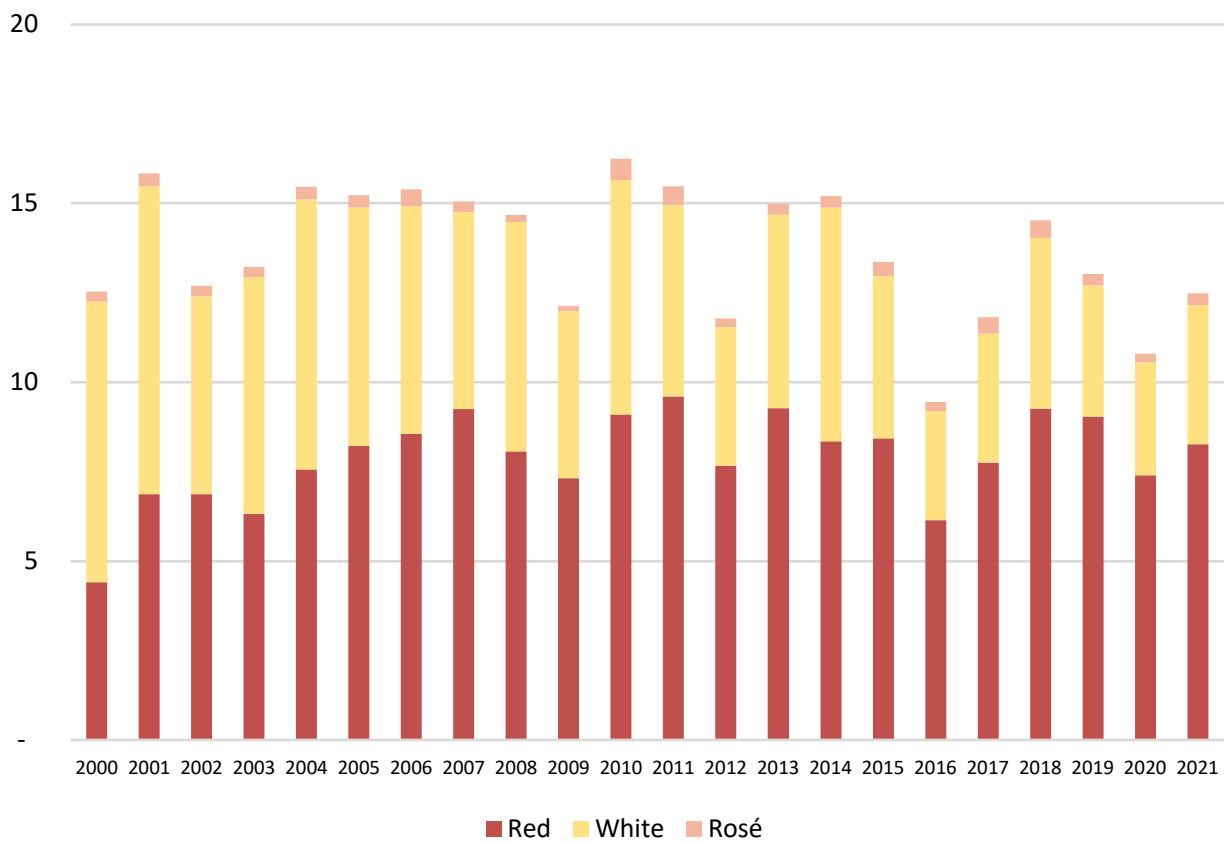




Argentina

Argentina (Figure 23) has witnessed a relevant structural change in the composition of its production of wine: if at the beginning of the years 2000s white wine accounted for more than 60% of the total and red wine for about 35%, in 2021 proportions are reversed (31% for white wine and 66% for red wine). Rosé wine, on the contrary, shows a much more stable growth path, ranging between 2 and 4% of the total production across the whole period.

Figure 23. Argentina - Evolution of wine production by colour (mhl), 2000-2021

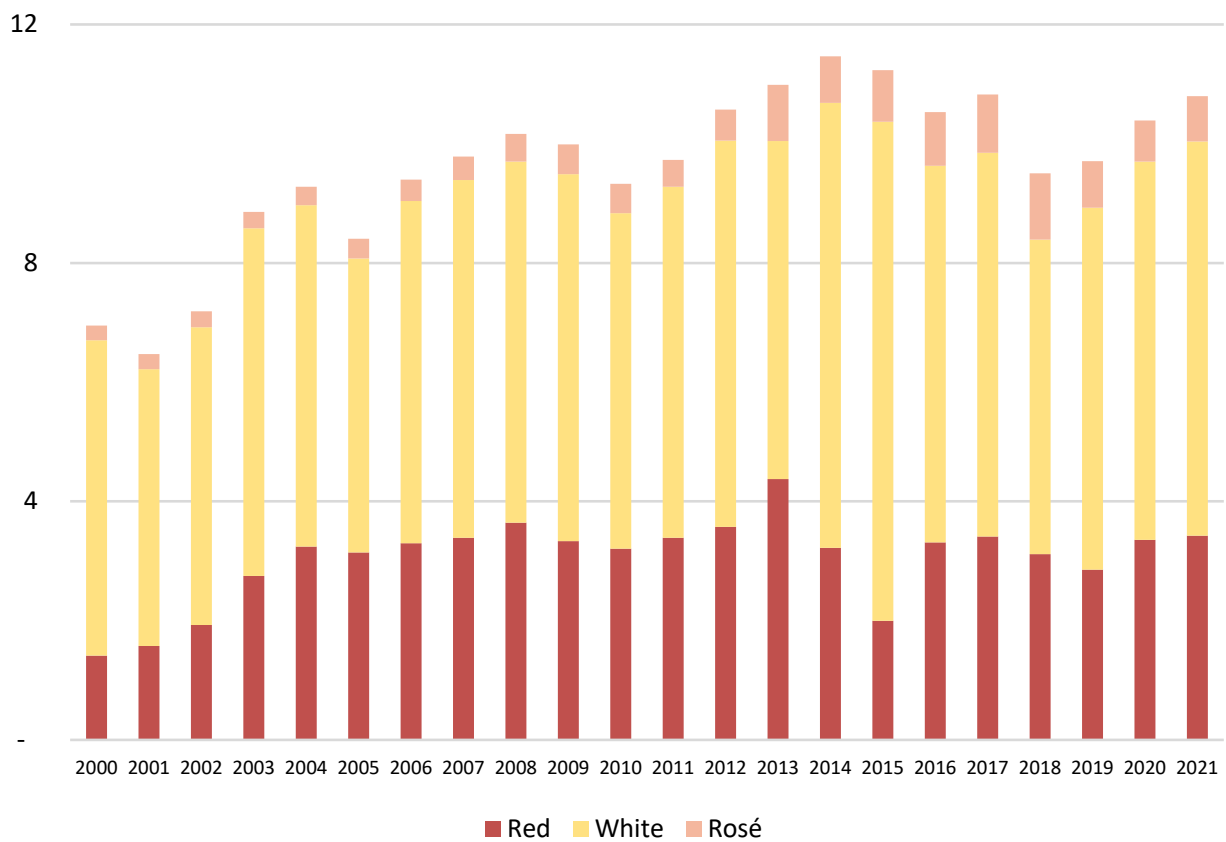




South Africa

South Africa (Figure 24) is a predominantly white wine producer and has seen a significant expansion of its total wine production over the period 2000-2021. Interestingly, this growth can be for a large part attributed to the increase in production of red and rosé wines, which today account for 32% and 8% of the total production respectively.

Figure 24. South Africa - Evolution of wine production by colour (mhl), 2000-2021

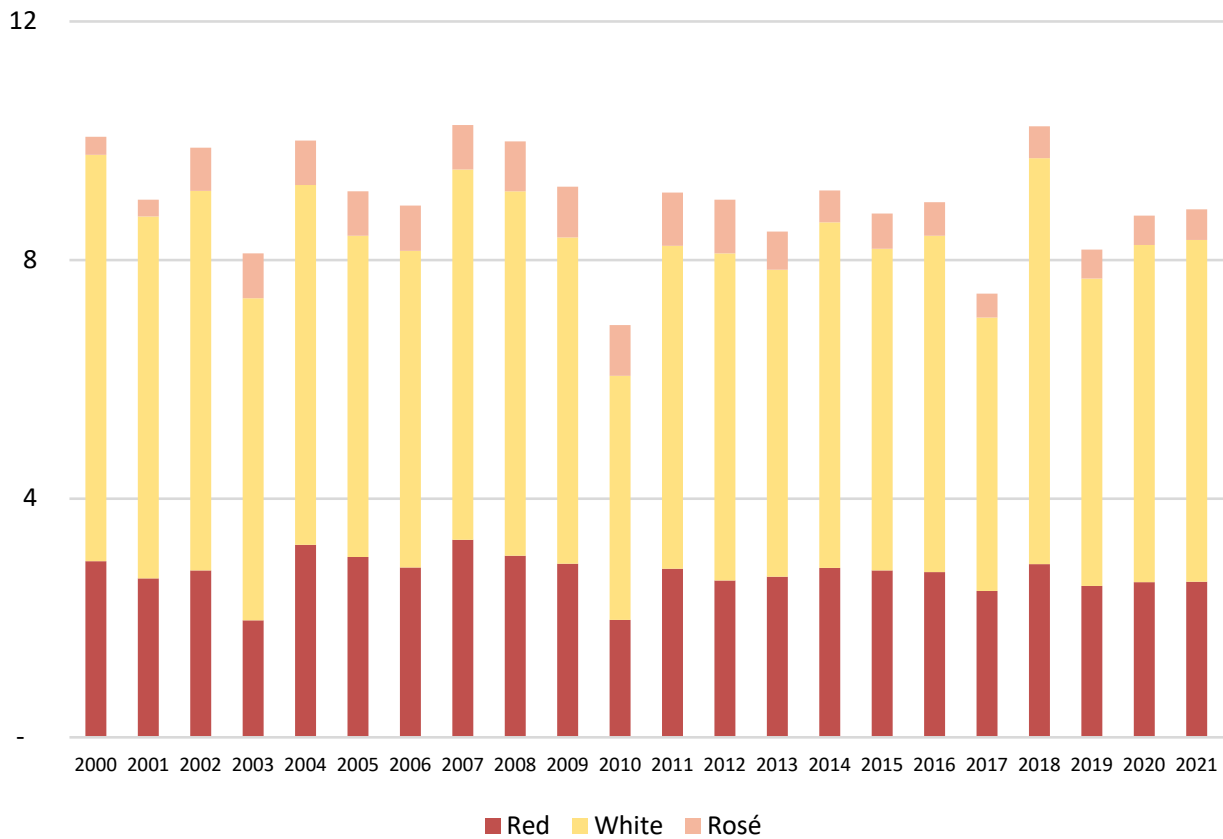




Germany

Germany (Figure 25) exhibits a stable trend over the period 2000–2021, with no major changes in the composition of wine production by colour. Overall white wine has the largest share (65%), followed by red wine (30%) and rosé wine (5%).

Figure 25. Germany - Evolution of wine production by colour (mhl), 2000-2021

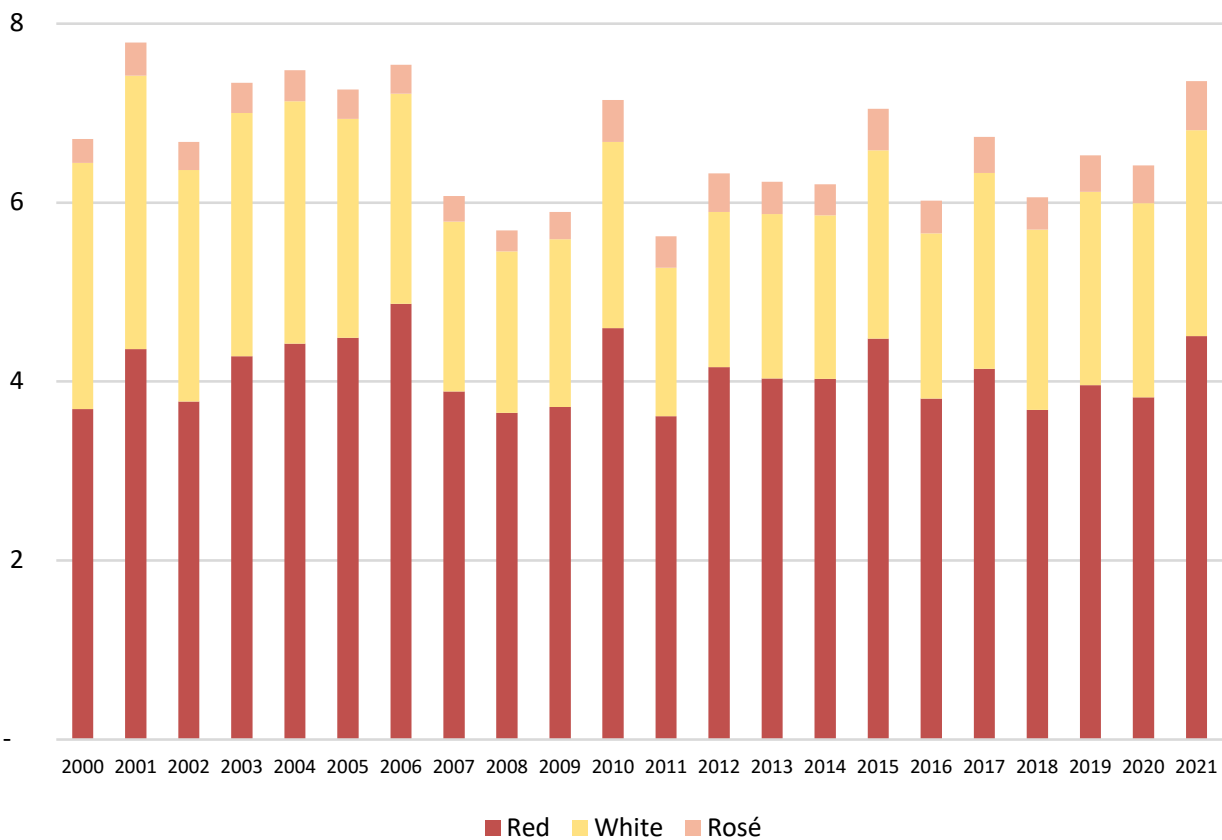




Portugal

Portugal (Figure 26), the tenth producer at the world level in 2021, has a wine production characterised by a large percentage of red wine, whose relative share increased rapidly between 2000 and 2006 (from 55% to 65%) and then stabilized in a range between 60 and 65% in the following years. An opposite trend characterised white wine production, which moved from 40 to 30% in the last 20 years. Rosé wine has almost doubled during the period under study and now represents 7% of the national production.

Figure 26. Portugal - Evolution of wine production by colour (mhl), 2000-2021





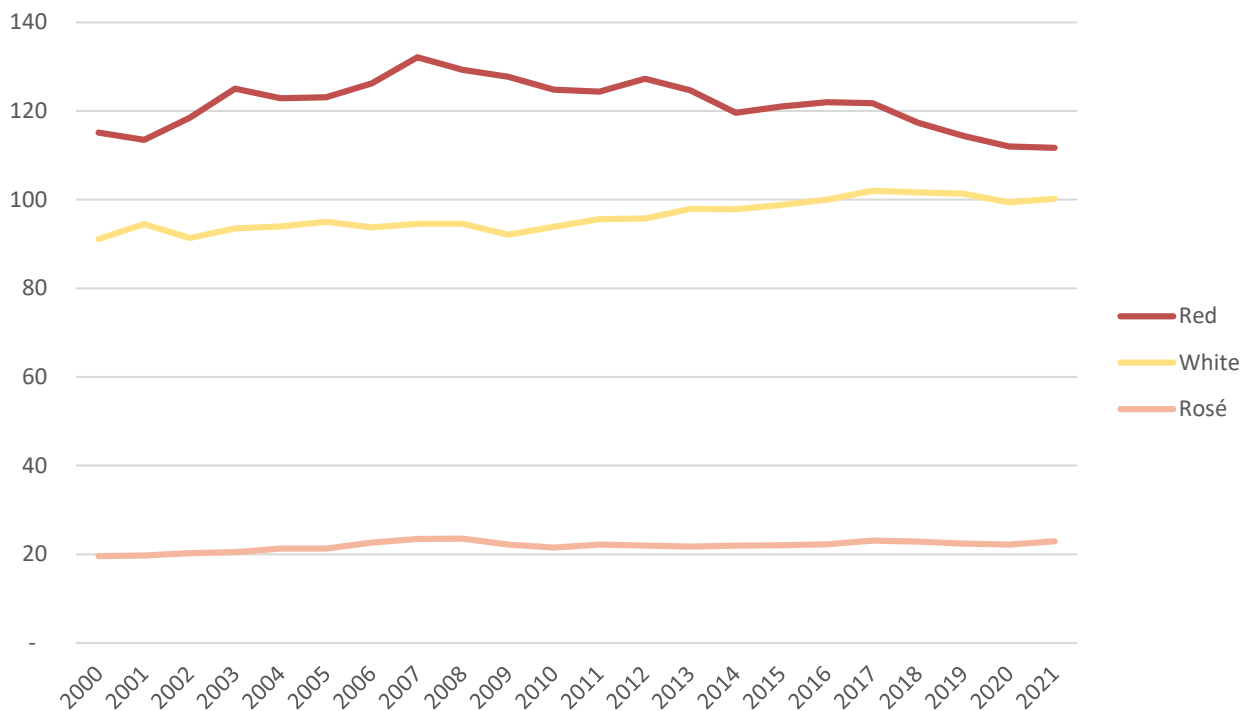
3 • CONSUMPTION

This chapter is dedicated to the demand side. It begins with an analysis of the evolution and geographical distribution of global wine consumption by colour. The following section then provides a breakdown of consumption patterns in major wine-consuming countries.

3.1 • Evolution and distribution of global wine consumption by colour

As shown in Figure 27, in 2021 world red wine consumption reached 112 mhl, representing 47% of the total wine consumption. White wine at 100 mhl accounts for 43% and the remaining 10% and rosé wine at 23 mhl.

Figure 27. Evolution of global wine consumption by colour (mhl), 2000-2021



Since reaching its peak in 2007, the consumption of red wine has decreased by 15% in less than fifteen years. On the other hand, white wine has increased by 10% from its lowest level in 2000. Unlike production, white wine consumption has not overtaken red wine. This is because most of the wine destined for industrial uses (distillation, production of vinegar, wine-based beverages, etc.) is white¹¹. It should be noted that white wine consumption has remained relatively stable in the period 2000-2009, and it has been growing at a relatively fast pace starting from 2010, driven by the global success of sparkling wine.

The consumption of rosé wine (Figure 28) has risen by 17% from its lowest level in 2000. After a fast growth in the period 2000-2007, the rosé market was hit by the global financial crisis in the period 2008-2010, and it started growing again from 2011, although at a slower pace.

¹¹ According to OIV estimates the volume of wine that annually goes to transformation and not to direct human consumption is between 30 and 35 mhl. More details can be found in the 2019 OIV thematic focus on industrial uses of wine: <https://www.oiv.int/sites/default/files/2022-09/focus-oiv-2019-industrial-use-of-wine.pdf>



Figure 28. World rosé wine consumption (mhl), 2000-2021

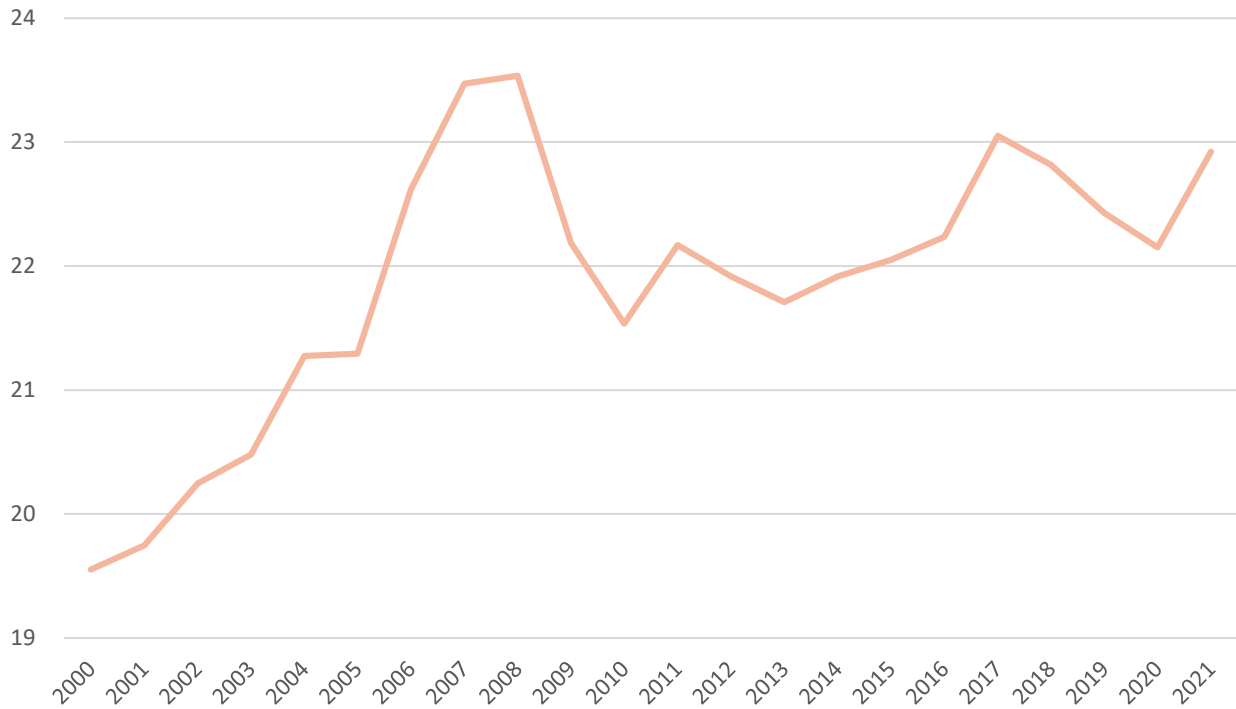


Figure 29 and Figure 30 provide a comparison of colour distribution over time. Figure 29 shows the average breakdown of consumption for the years 2000-2004, where red wine accounts for 51.3%, followed by white wine at 40% and rosé wine at 8.7%.

Figure 30 displays the average colour distribution for the years 2017-2021, indicating an increase in the share of white wine to 42.2% and rosé wine to 9.5%. Red wine's share has decreased to 48.3% but still represents the largest relative share.

Figure 29. Breakdown of wine consumption by colour (average 2000-2004)

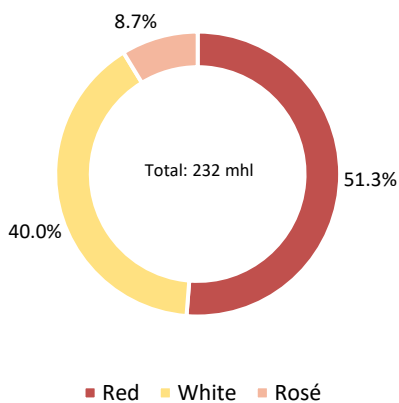
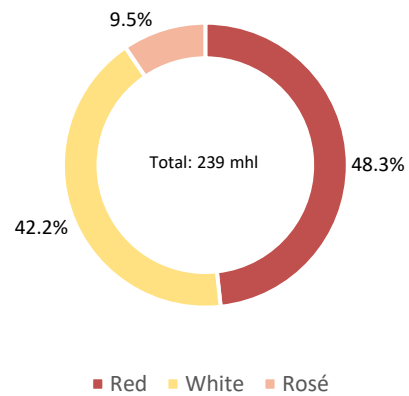


Figure 30. Breakdown of wine consumption by colour (average 2017-2021)



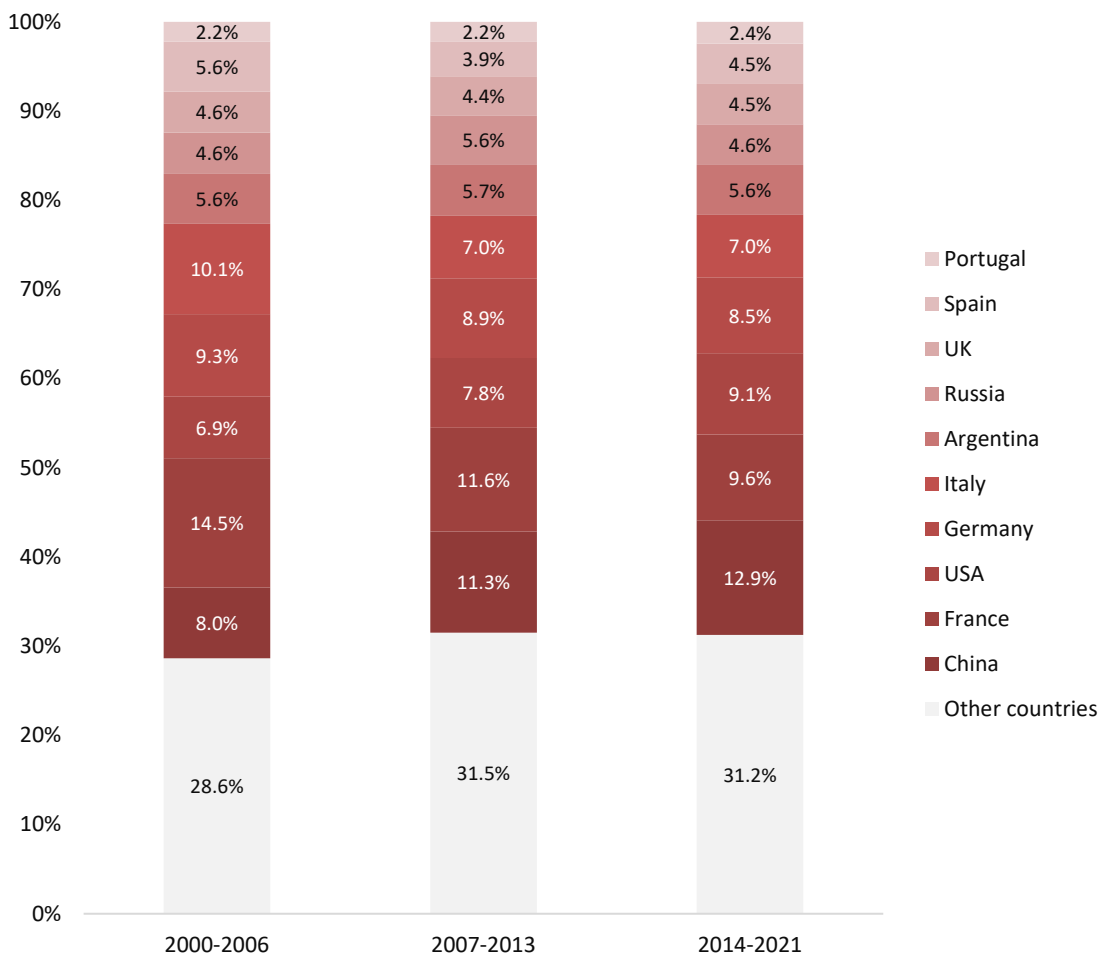


3.1.1• Red Wine

Figure 31 shows the shares of world red wine consumption by country. As in the case of production in chapter 2, the compiled histograms display the average shares by country for the periods 2000–2006, 2007–2013, and 2014–2021. As the graph shows, wine consumption is much less concentrated than production, with the top 10 countries accounting for about 70% of the world total.

Major red wine producers exhibit heterogeneous dynamics in their consumption patterns. More specifically, China and the USA have witnessed a significant increase in their consumption shares. On the contrary, France, Germany and Italy recorded an overall decline during the period examined. All the other countries in the top 10 have maintained an overall stable consumption share throughout the whole period.

Figure 31. Breakdown of global red wine consumption by country





Looking at country-level data of red wine consumption in absolute terms, as shown in Figure 32, the top three countries in 2021 are the USA (11.5 mhl), China (9.8 mhl), Germany (9.6 mhl), and France (9.1 mhl). These countries are closely followed by Italy, fifth with a consumption of 9.0 mhl. The top ten is then completed by Russia (5.9 mhl), Argentina (5.8 mhl), Spain (5.6 mhl), the UK (5.4 mhl), Brazil (2.9 mhl) and Portugal (2.7 mhl). It is interesting to note that within the top ten red wine producers, three countries - Chile, Australia, and South Africa - do not rank among the top ten red wine consumers, due to their strong exporting vocation.

Figure 32. Major red wine consuming countries in 2021 (mhl)

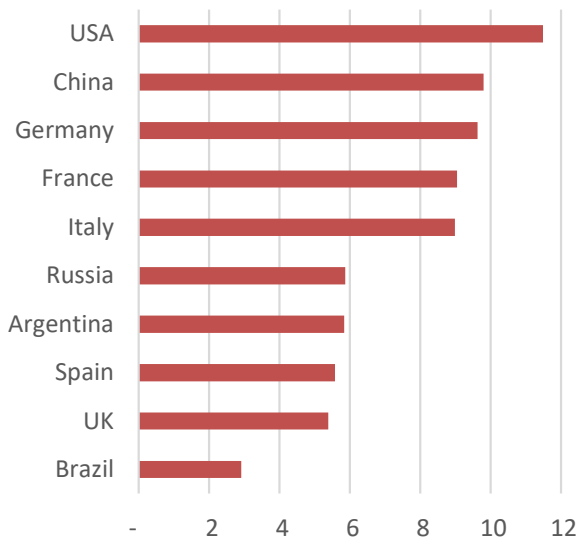
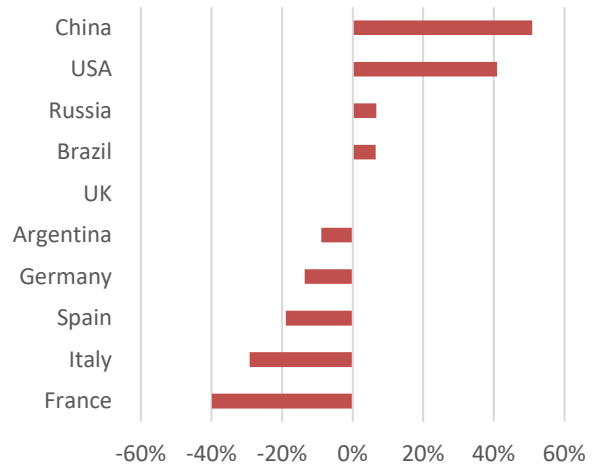


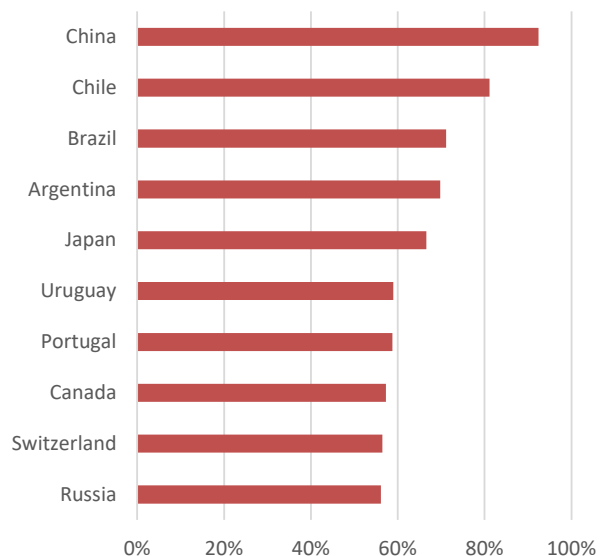
Figure 33 shows the growth rate between the averages over the periods 2000-2004 and 2017-2021 in the top 10 markets. What emerges is that red wine consumption in the last twenty years has increased mainly in non-European countries. In particular, positive growth rates are recorded in China (+50.9%), the USA (+40.9%), Russia (+6.8%) and Brazil (+6.5%). The top three red wine-producing countries - Italy, France and Spain - have negative growth rates of -29.2%, -39.9%, and -18.9%, respectively.

Figure 33. Growth rate of red wine consumption (2000-2004 vs 2017-2021) in major wine-consuming countries



In Figure 34, the ranking of countries by proportion of red wine in national wine consumption is shown. With the exception of Portugal (59%) and Switzerland (56%), all the other countries listed in this ranking are outside Europe. China, Chile and Brazil are the countries where red wine consumption accounts for most of the total consumption, with shares of 92%, 81% and 71%, respectively. The top 10 is completed by Argentina (70%), Japan (67%), Uruguay (59%), Canada (57%), and Russia (56%).

Figure 34. Countries with highest percentage of red wine in national wine consumption in 2021



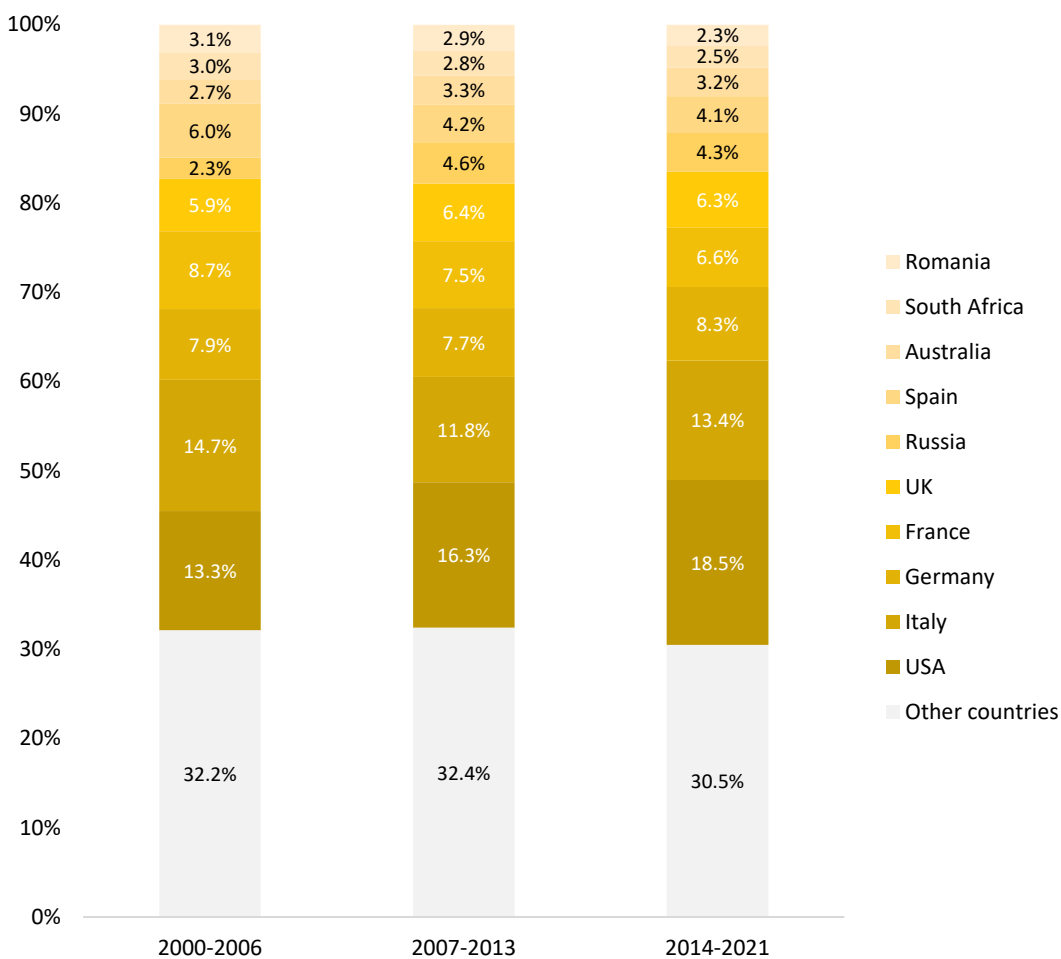


3.1.2• White wine

According to the data presented in Figure 35, the USA is the largest market for white wine, and its market share has consistently increased since 2000. A similar growth path has been recorded in Germany, the UK, Russia and Australia.

Italy's share of consumption fell from 14.7% in the period 2000-2006 to 11.8% in 2007-2013, but then rebounded to 13.4%. Countries like France, Spain, South Africa and Romania have all lost a few percentage points with respect to the beginning of the century.

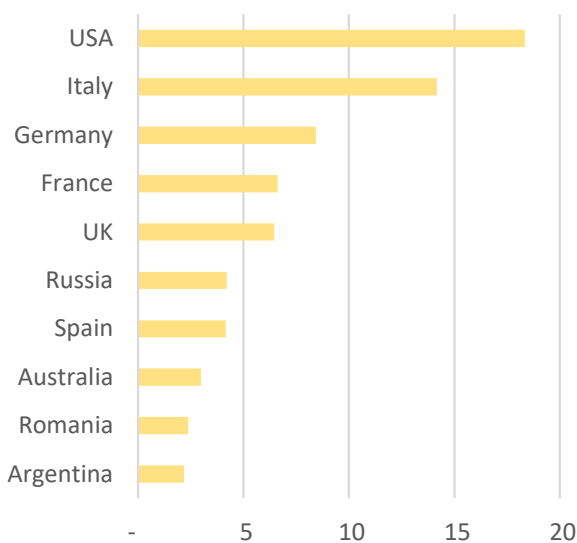
Figure 35. Breakdown of global white wine consumption by country





The ranking of white wine consumption by country in absolute terms in 2021 is shown in Figure 36. The top three countries in white wine consumption are the USA (18.3 mhl), Italy (14.2 mhl), and Germany (8.4 mhl). The top ten is completed by France (6.6 mhl), the UK (6.5 mhl), Russia (4.2 mhl), Spain (4.2 mhl), Australia (3 mhl), Romania (2.4 mhl) and Argentina (2.2 mhl).

Figure 36. Major white wine-consuming countries in 2021 (mhl)



In terms of growth rate of consumption of the top 10 markets for white wine between the period 2000-2004 and the period 2017-2021 (Figure 37), Russia exhibits by far the largest growth (+145%). Other countries that record positive growth are the USA (+57.5%), Australia (+29.3%), the UK (+20.3%), Germany (+14.4%) and Italy (+1.5%). Negative rates are reported for Argentina (-56.4%), Spain (-27.9%), Romania (-19.8%), and France (-19.7%).

Figure 37. Growth rate of white wine consumption (2000-2004 vs 2017-2021) in major wine-consuming countries

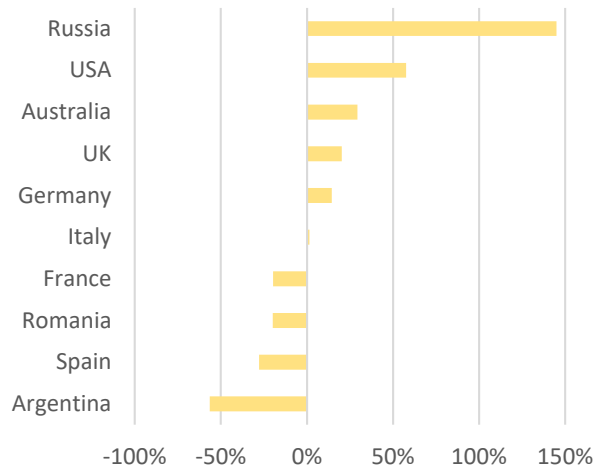
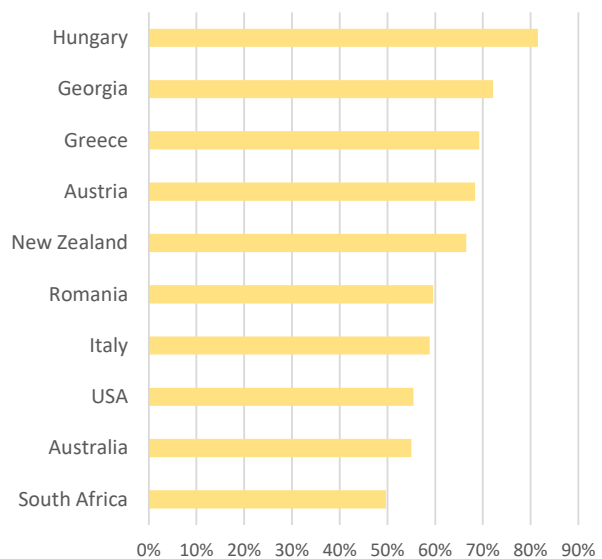


Figure 38 shows that Hungary (82%), Georgia (72%) and Greece (69%) are the top three countries in terms of share of white wine in total national wine consumption. These countries are followed by Austria (68%), New Zealand (67%), Romania (60%), Italy (59%), the USA (55%), Australia (55%), and South Africa (50%).

Figure 38. Countries with highest percentage of red wine in national wine consumption in 2021



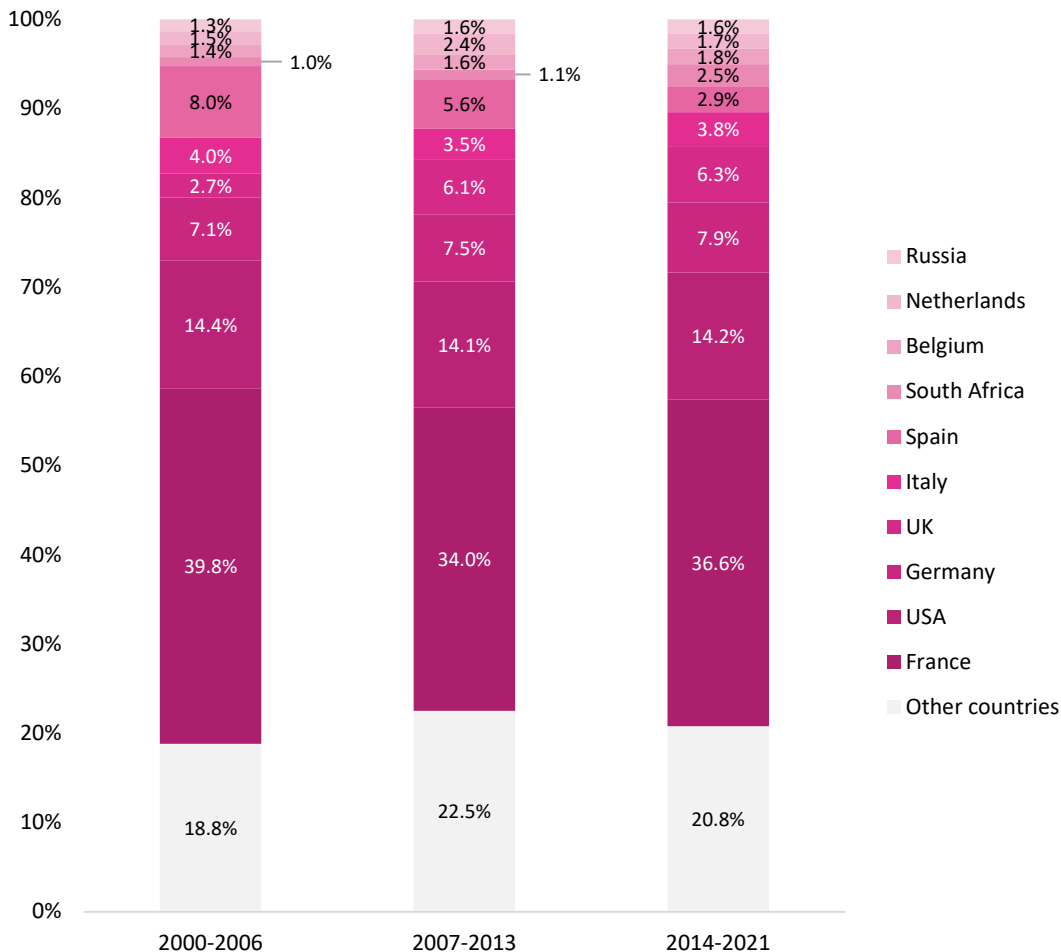


3.1.3• Rosé wine

Compared to red and white wines, rosé consumption is much more concentrated, especially in the main rosé wine-producing countries, as shown in Figure 39. France accounts for a significant share of world consumption (37%), which is much larger than the combined share of all countries outside the top ten. While most major consuming countries have remained relatively stable across the period analysed, Spain has shown a strong decline over time.

On the contrary, the UK recorded notable growth, especially from the period 2000–2006 (2.7%) to 2007–2013 (6.1%). In recent years, South Africa has emerged as a new market, with an average share of 2.5%. Interestingly, the top five producing countries of rosé wine are also among the top ten markets.

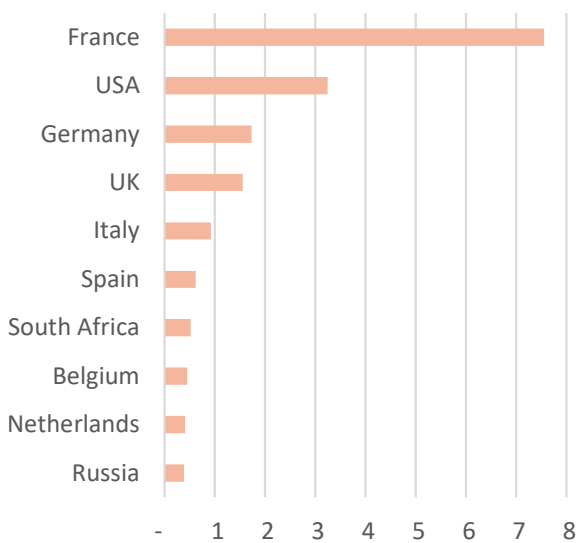
Figure 39. Breakdown of global rosé wine consumption by country





Concerning rosé wine consumption in absolute terms (Figure 40), France holds a dominant position with a substantial volume of 7.6 mhl in 2021. Following behind are the USA (3.2 mhl) and Germany (1.7 mhl). The top ten is completed by the UK (1.6 mhl), Italy (0.9 mhl), Spain (0.6 mhl), South Africa (0.5 mhl), Belgium (0.5 mhl), the Netherlands (0.4 mhl), and Russia (0.4 mhl).

Figure 40. Major rosé wine-consuming countries in 2021 (mhl)



As Figure 41 shows, the top three countries for growth rate between the periods 2000-2004 and 2017-2021 are the UK (+212.6%), South Africa (+164.4%) and Russia (+66.7%). Differently from red and white wines, among the 10 largest rosé wine markets in the world, only one country - Spain (-65.2%) - has witnessed a significant decrease.

Figure 41. Growth rate of rosé wine consumption (2000-2004 vs 2017-2021) in major wine-consuming countries

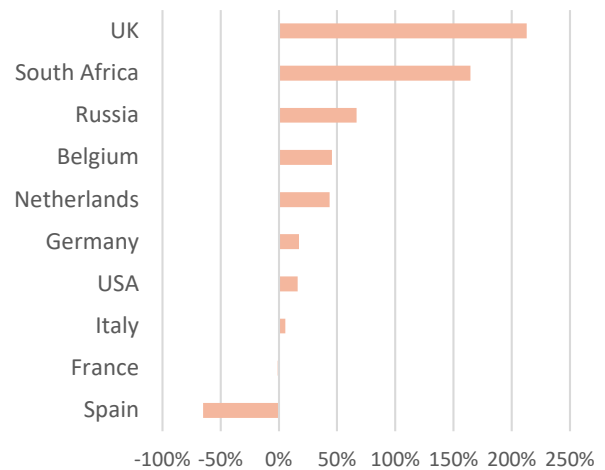
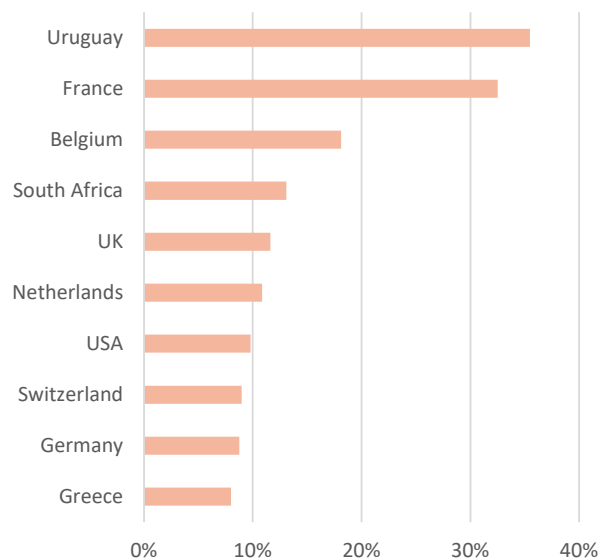


Figure 42 indicates that Uruguay (36%) and France (33%) are the countries with very high shares of rosé wine in total consumption, placing them well ahead of all the other countries. Other countries with a share above 10% are Belgium (18%), South Africa (13%), the UK (12%) and the Netherlands (11%). The top 10 is completed by the USA (10%), Switzerland (9%), Germany (9%) and Greece (8%).

Figure 42. Countries with the highest percentage of rosé wine in national wine consumption in 2021





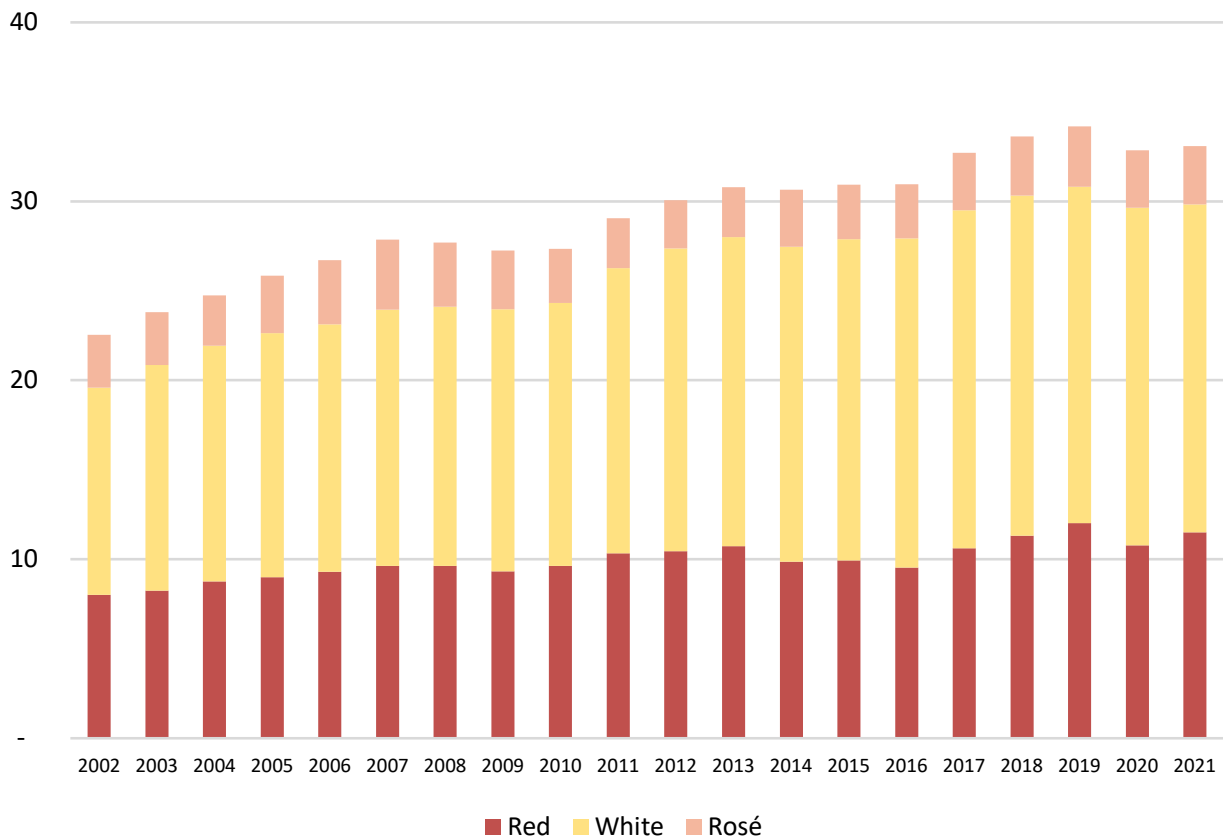
3.2 • Major consuming countries

This section provides an overview of the evolution of the consumption of red, white, and rosé wine in the top 10 wine-consuming countries over the period 2000–2021.

USA

The top wine consumer in 2021 is the USA with a consumption of 33.1 mhl (Figure 43), which accounts for 14.1% of world wine consumption. The consumption breakdown by colour is estimated at 11.5 mhl for red wine, 18.3 mhl for white wine, and 3.2 mhl for rosé wine. Consumption trends show an increase in all colours: red wine (+54.9% change), white wine (+64.9% change), and rosé wine (+22.1% change).

Figure 43. USA - Evolution of wine consumption by colour (mhl), 2000-2021

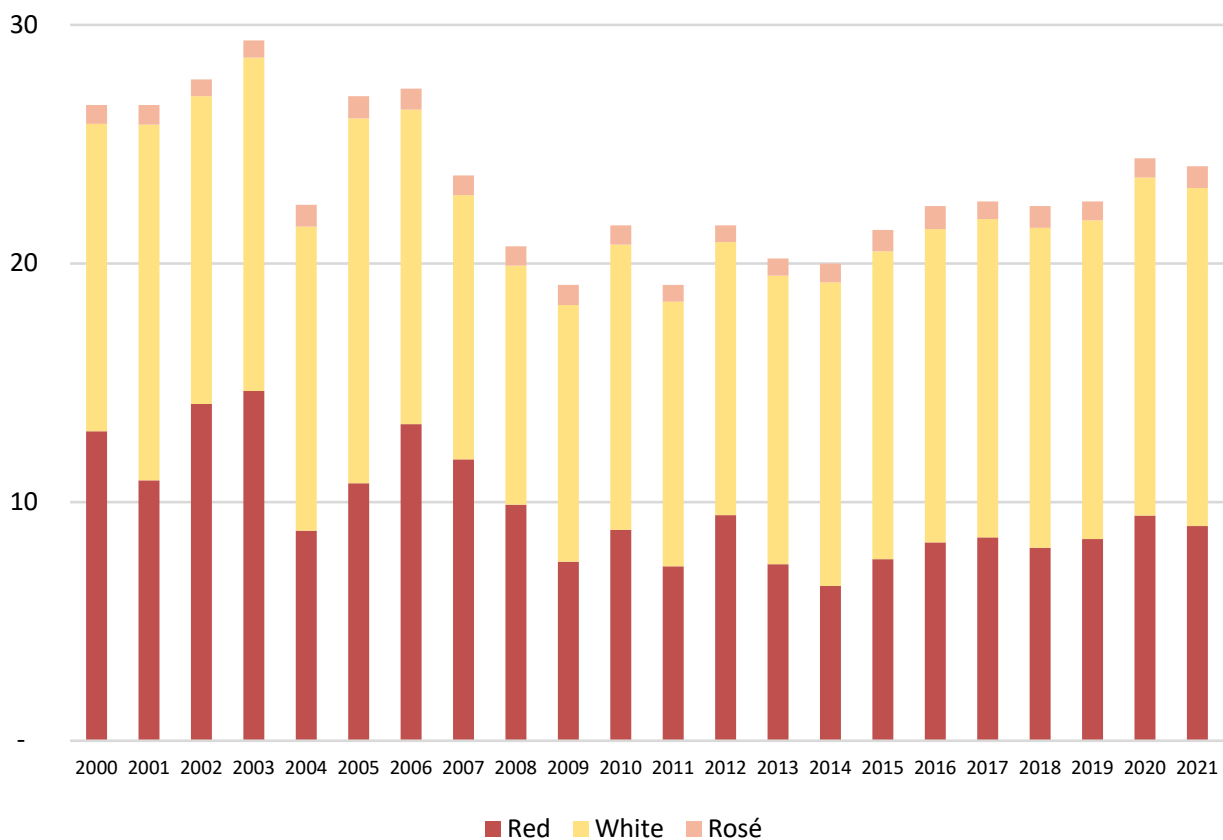




Italy

Italy (Figure 44), the top producer in 2021, is the second market in the world with total consumption estimated at 24.1 mhl. The breakdown by colour is as follows: 9 mhl of red wines, 14.2 mhl of white wines, and 1 mhl of rosé wines. During the 2000-2021 period, Italy has seen steady growth in white and rosé wines, up 10% and 15.4% respectively, while consumption of red wine has decreased by 30.6%. In relative terms, red wine represented 49% of consumption in 2000 while it is at 37% in 2021; an opposite trend is observed for white (+11 percentage points) and rosé wine (+1 percentage points).

Figure 44. Italy - Evolution of wine consumption by colour (mhl), 2000-2021

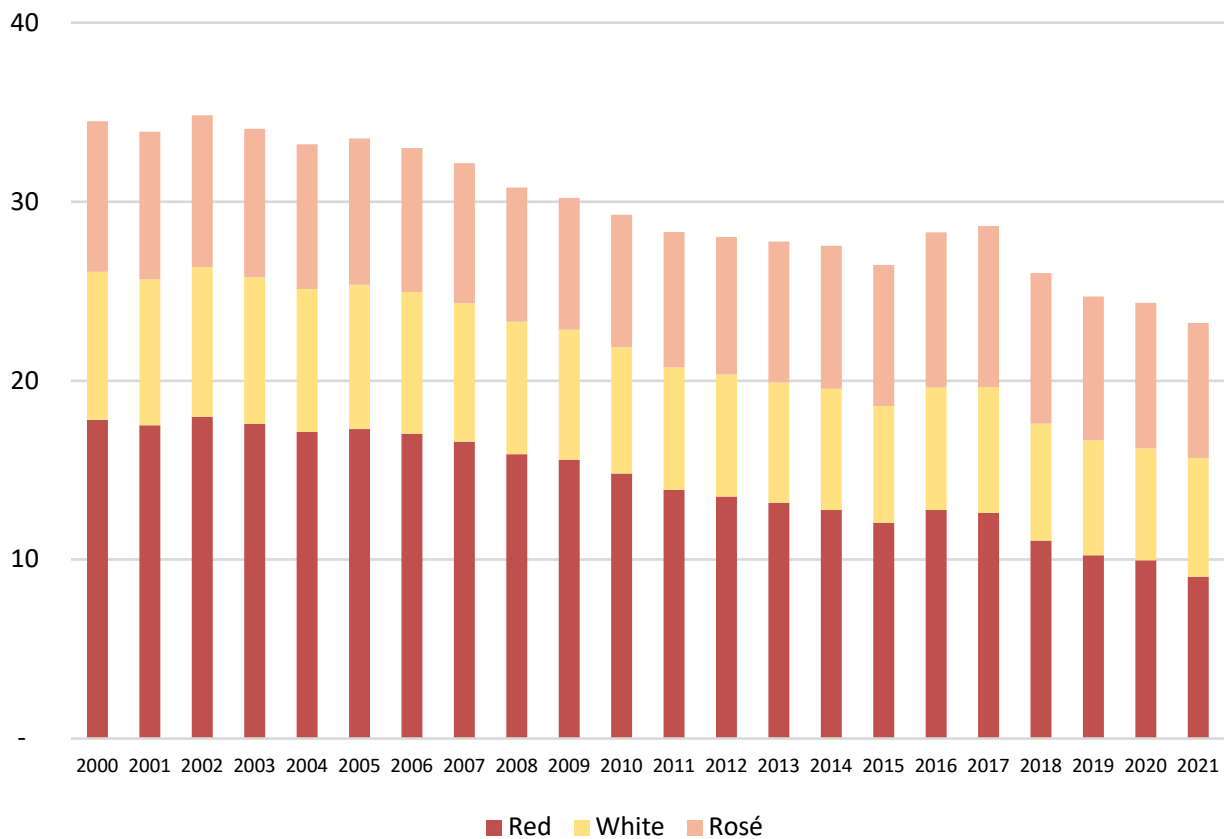




France

France (Figure 45) is the third-largest wine consumer at the world level with a total consumption in 2021 estimated at 23.2 mhl. The significant decline in red wine consumption is probably the most apparent trend: if 17.8 mhl were consumed in 2000, in 2021 red wine consumption was only 9 mhl, representing a -49.2% variation. White wine consumption remains relatively stable in absolute terms, with a -20% change between 2000 and 2021. Similarly, rosé wine consumption, which in France accounts for a much larger share (33%) than in other countries, has remained stable in absolute terms with a percentage change over the 2000-2021 period of -10.1%. Therefore, the decline in total consumption can be mainly attributed to the decreased demand for red wine, resulting in a significant structural change in the composition of consumption. If in 2000 red wine accounted for 52% of national consumption, in 2021 the percentage goes down to 39%.

Figure 45. France - Evolution of wine consumption by colour (mhl), 2000-2021

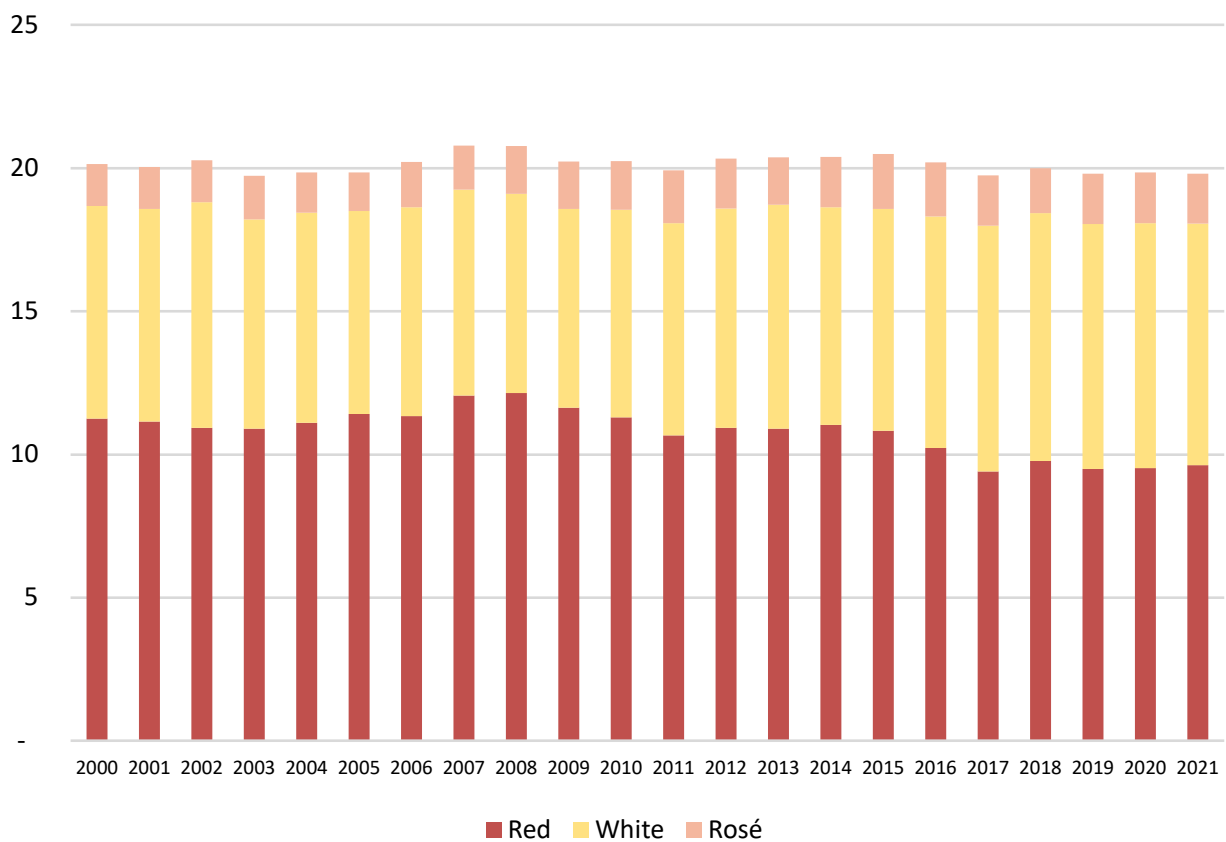




Germany

Germany (Figure 46) is a wine market that has remained relatively stable over the period 2000-2021, especially in terms of total volumes. When the breakdown by colour is analysed, there are two opposing trends: on the one side, the share of red wine has decreased from 56% in 2000 to 48% in 2021; on the other side, white and rosé have increased by 5 and 2 percentage points respectively.

Figure 46. Germany - Evolution of wine consumption by colour (mhl), 2000-2021

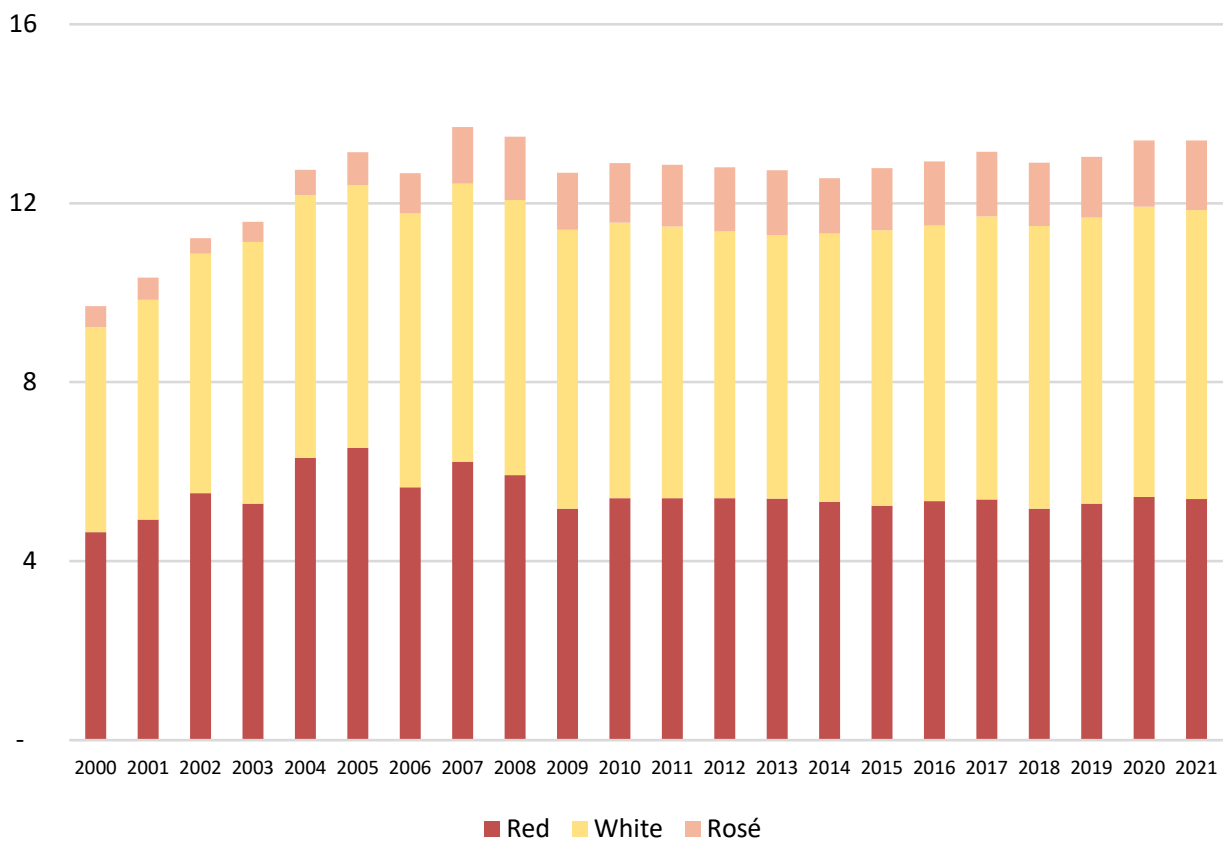




UK

In the UK (Figure 47), the fifth market in the world, wine consumption has significantly increased in all colours, although at a different rate. Even if nowadays red wine consumption is higher than at the beginning of the century, its relative share has decreased from 48% in 2000 to 40% in 2021. White wine has remained stable in terms of its relative share, and rosé has increased (from 5% in 2000 to 12% in 2021).

Figure 47. UK - Evolution of wine consumption by colour (mhl), 2000-2021

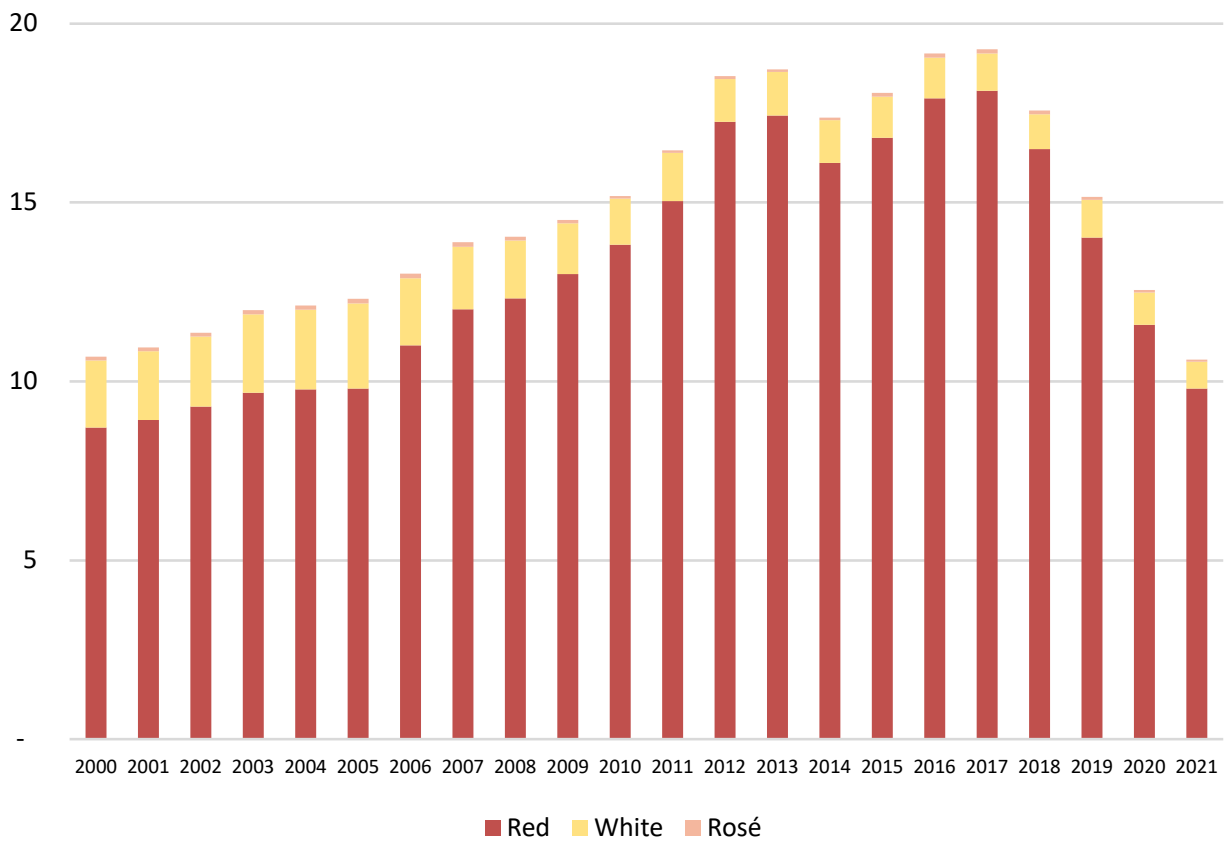




China

China's wine consumption (Figure 48) is mostly about red wine: with a share of 92% in 2021 it is the country that consumes most red wine, at least in relative terms. This share has been consistently increasing since the year 2000, when it was 81%, at the expense of white and rosé wines, which in 2021 account for 7% and 1% respectively.

Figure 48. China - Evolution of wine consumption by colour (mhl), 2000-2021

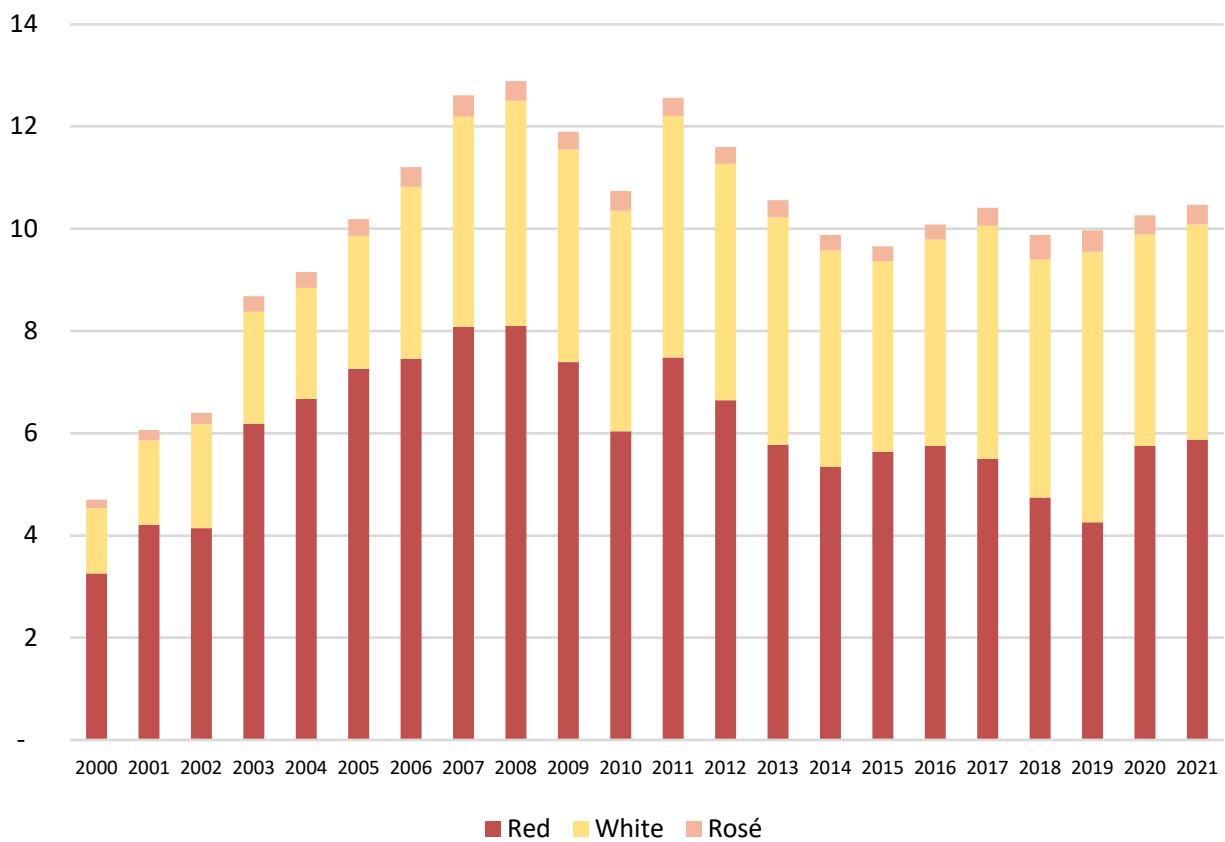




Russia

During the period 2000-2021, wine consumption in Russia (Figure 49) shows an upward trend across all colours. However, by analysing the evolution of the relative shares of the different colours over the period 2000-2021, it is interesting to highlight the increase of white wine (+13 percentage points) at the expense of red wine (-13 percentage points); rosé wine has a share that is relatively stable between 3 and 4% all along the period analysed.

Figure 49. Russia - Evolution of wine consumption by colour (mhl), 2000-2021

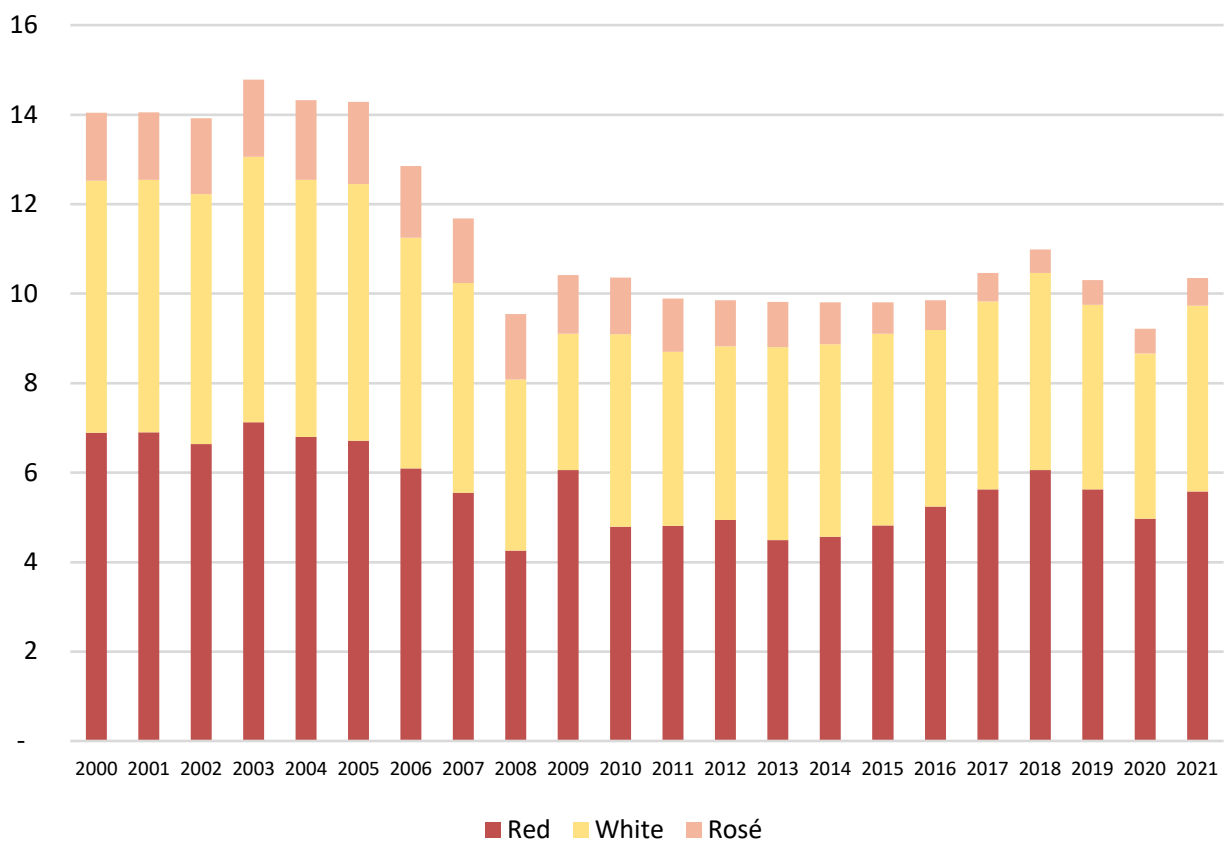




Spain

In Spain (Figure 50), the evolution of consumption shows a clear downward trend between 2000 and 2021. Therefore, a decline in the volumes of wines of all colours is observed. However, the relative weight of wine colours evolved in different manners. If red wine increased its relative weight by 5 percentage points (from 49% in 2000 to 54% in 2021), white wine stabilised at around 40%, and rosé wine lost 5 percentage points (from 11% in 2000 to 6% in 2021).

Figure 50. Spain - Evolution of wine consumption by colour (mhl), 2000-2021

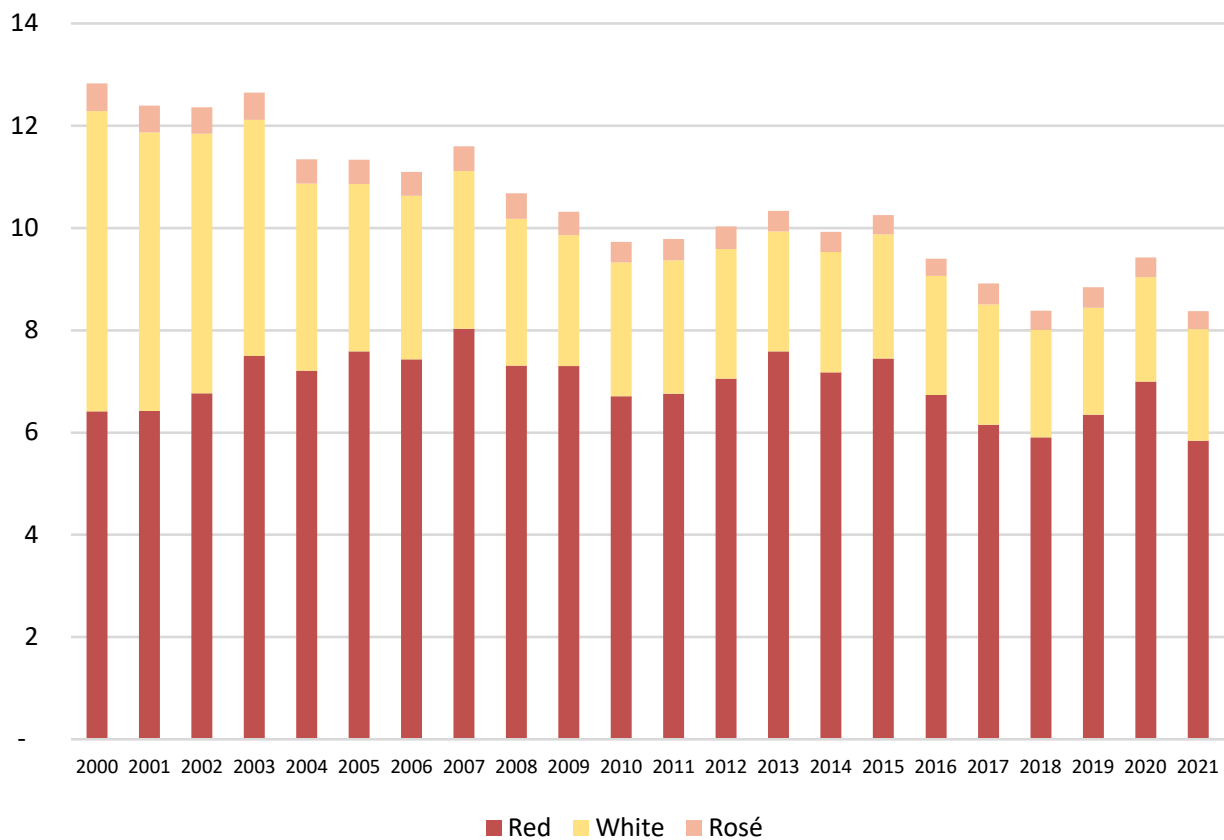




Argentina

The significant decline observed in Argentina's wine consumption (Figure 51) between 2000 and 2021, led not only to a decline in the absolute consumption volume of all colours but also to a change in the composition of consumption by colour. For example, in 2000 white wine accounted for 46% of the total, while in 2021 it represents only 26%. On the contrary, while red wine was about half of the total consumption in 2000, in 2021 it is close to 70%. Rosé wine shows a much more stable trend, with an average share of 4%.

Figure 51. Argentina - Evolution of wine consumption by colour (mhl), 2000-2021

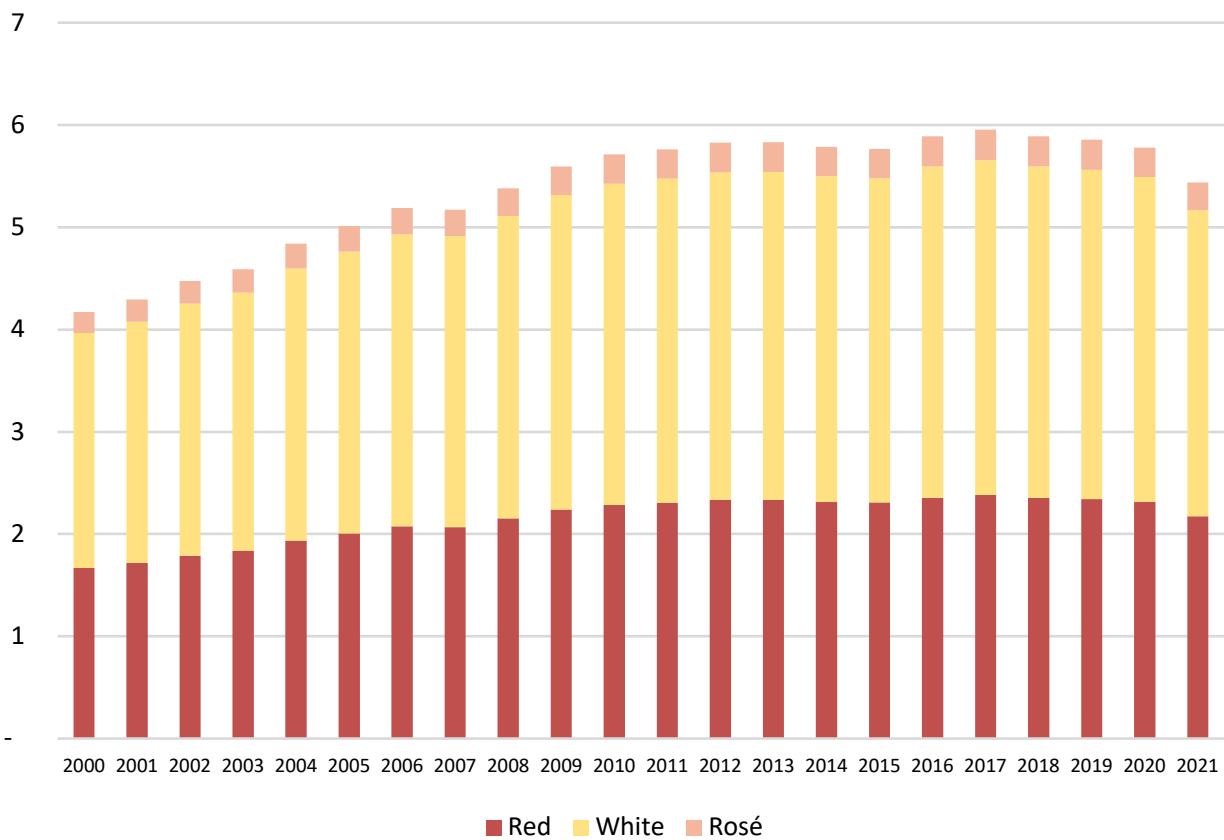




Australia

Australia (Figure 52) recorded a gradual and consistent upward trend in consumption of wines of all colours throughout the period 2000-2010 and then stabilized in the period 2011-2021. All colours have an annual growth rate of about 1% between 2000 and 2021. Differently from most of the other countries in the top 10, the relative shares of colours have remained stable across the years: red wine accounts on average for 40% of total consumption, white wine for 55%, and rosé wine for 5%.

Figure 52. Australia - Evolution of wine consumption by colour (mhl), 2000-2021





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 50 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.

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