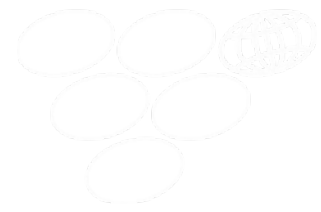




INTERNATIONAL ORGANISATION OF VINE AND WINE

STATE OF THE WORLD
VINE AND WINE SECTOR

Pau Roca
Director General of the OIV
OIV Press Conference
27 April 2022

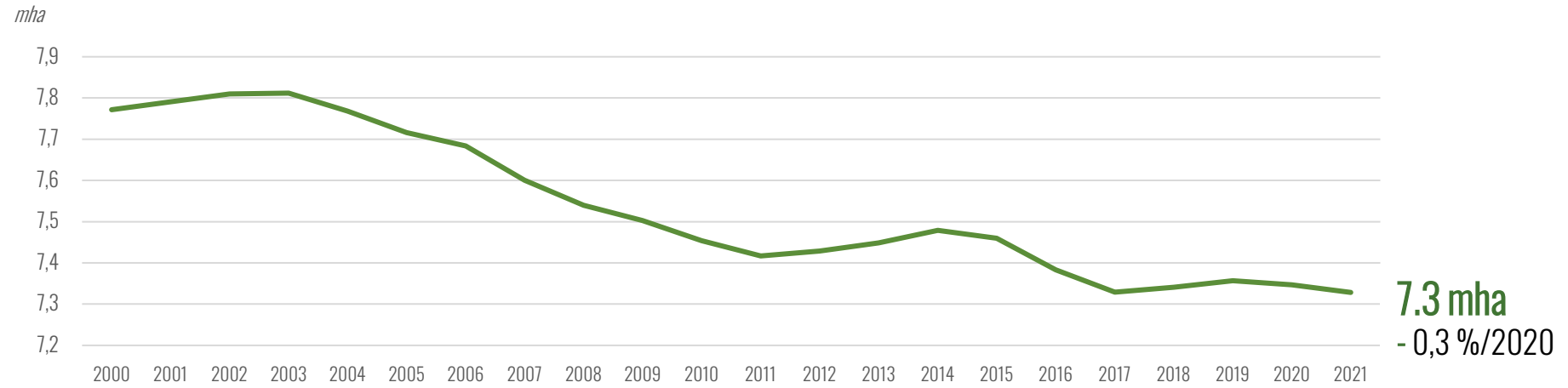


Vineyard Surface Area



Vineyard Surface Area

Evolution of world vineyard surface area



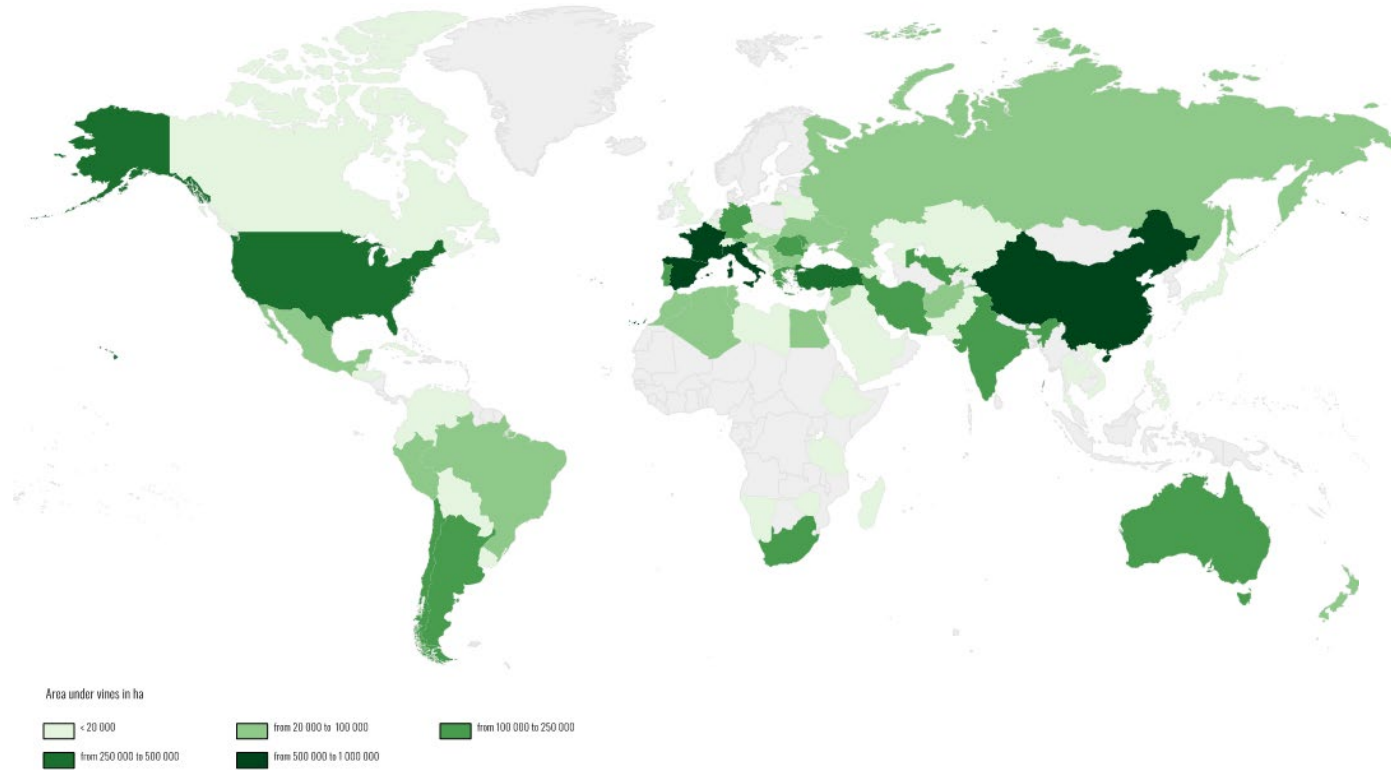
The world area under vines, corresponding to the total surface area planted with vines for all purposes (wine, table grapes and raisins), including young vines not yet in production, is estimated at **7.3 mha in 2021**.

The world vineyard has **stabilised since 2017**, mainly thanks to the slow down of the Chinese vineyard's growth and the implementation of the system of new planting authorisation in the **EU**, which stands for the eight consecutive year at **3.3 mha**. The current stabilisation, however, hides **heterogeneous evolutions in different regions of the world**.



Vineyard Surface Area

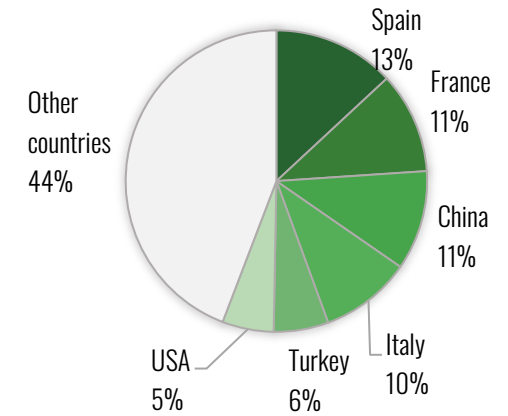
World vineyard distribution in 2021



© OIV

Top 6 vine-growing countries represent 56 % of the world vineyard surface area in 2021

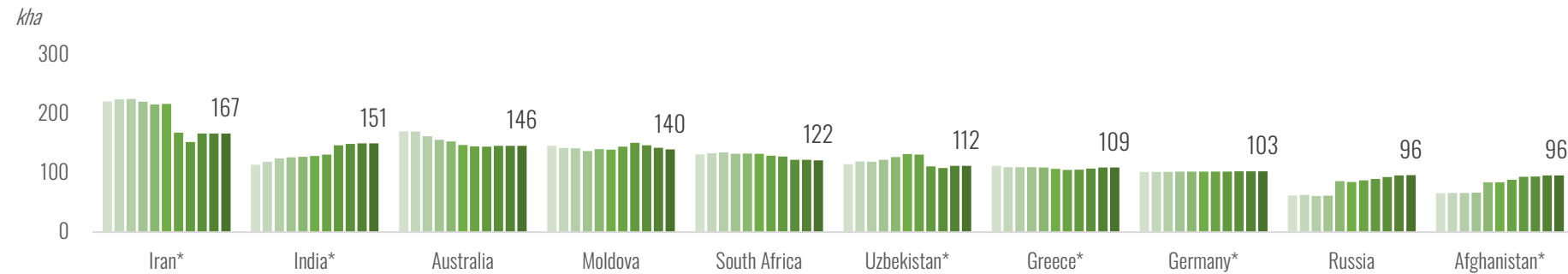
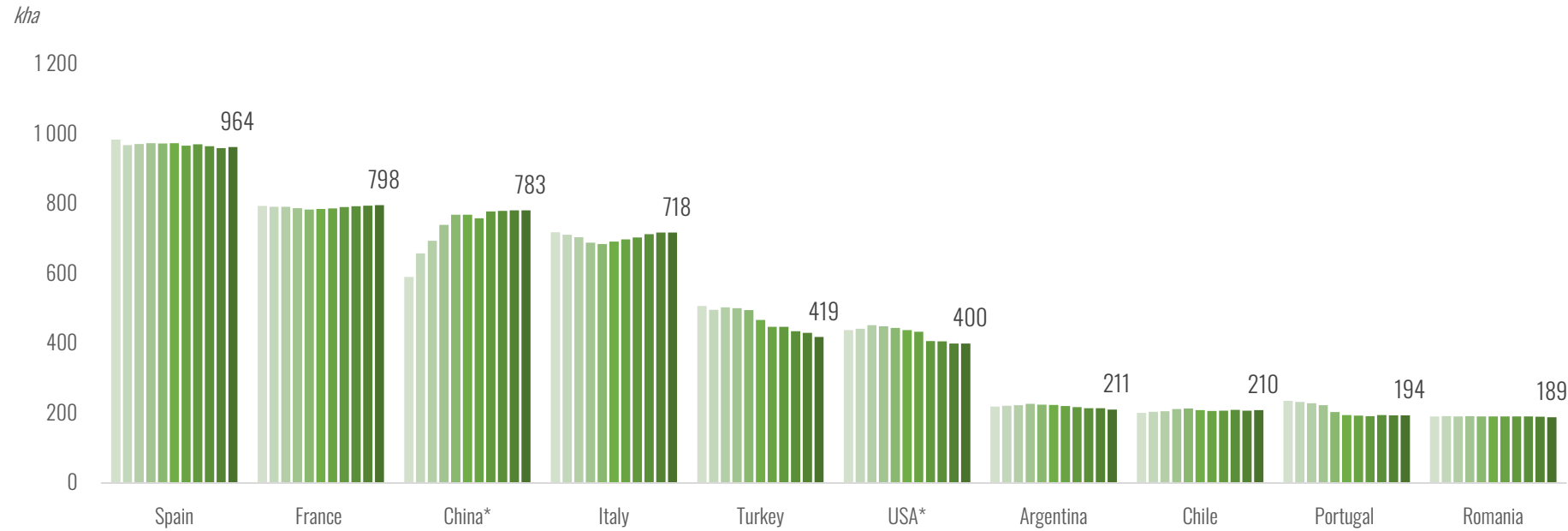
Breakdown of vineyard surface area in 2021



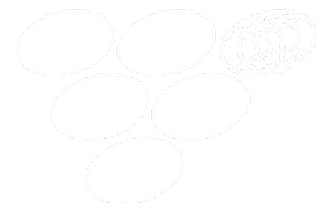


Vineyard Surface Area

Major vine-growing countries by surface area, 2011-2021



*Carried over from latest available data

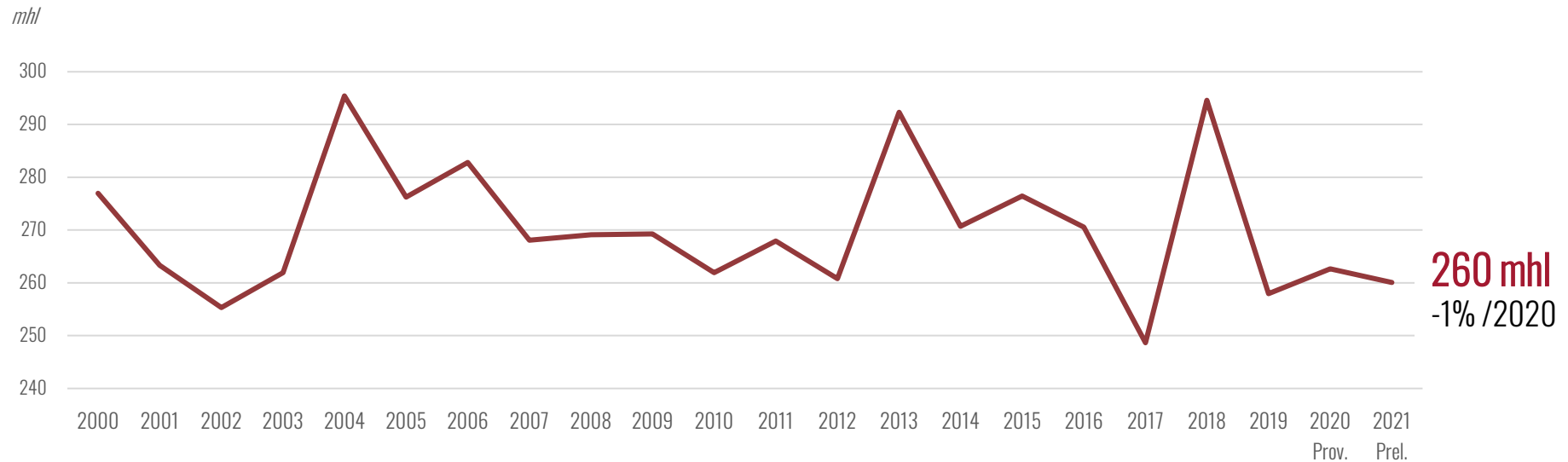


Wine production



Wine Production

Evolution of world wine production

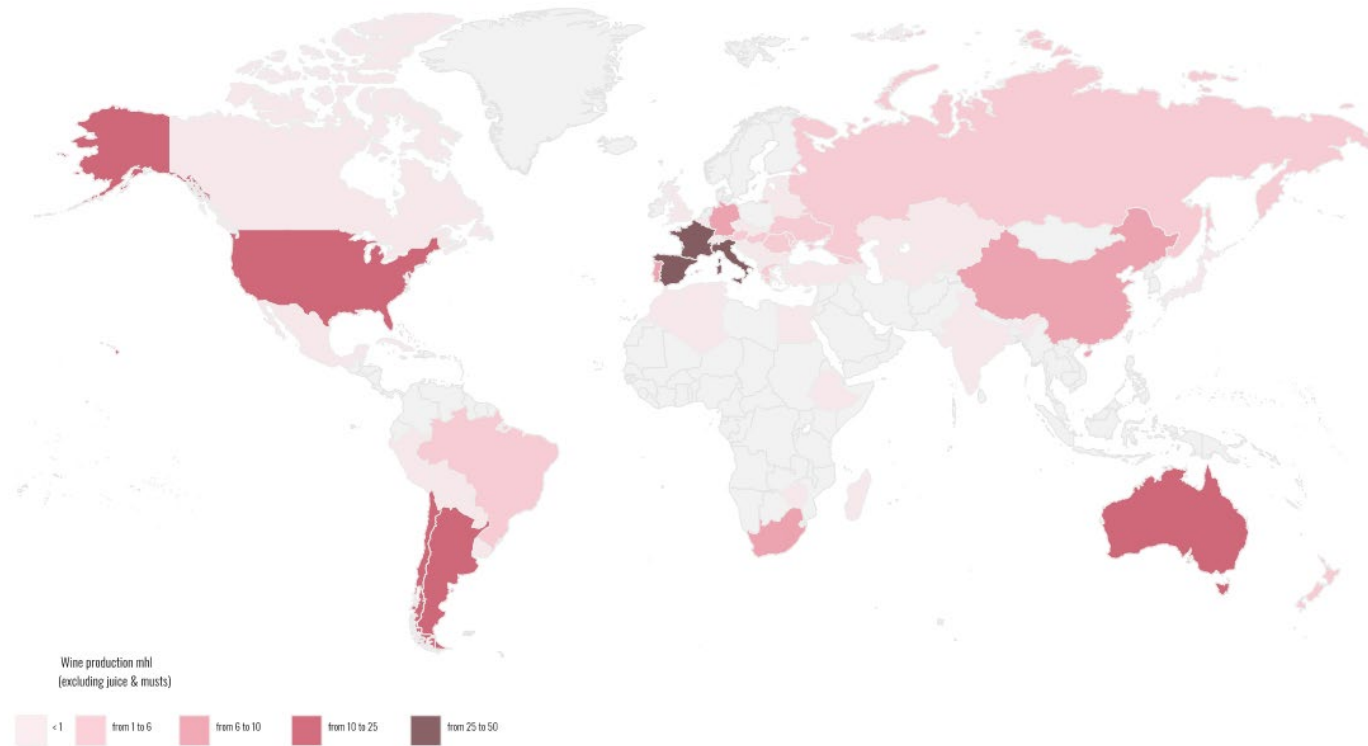


In 2021 world wine production, excluding juices and musts, is estimated at **260 mhl**, marking a decrease of almost 3 mhl (-1%), compared to 2020. Overall, the 2021 global wine production volume can be defined for the third consecutive year as **slightly below its ten-year average**. This is the result of two contrasting trends that balance out at the world level: on one hand the sharp **fall in some of the major EU wine producing countries**, on the other hand the **record-high harvests of the Southern Hemisphere**.



Wine Production

World wine production distribution in 2021



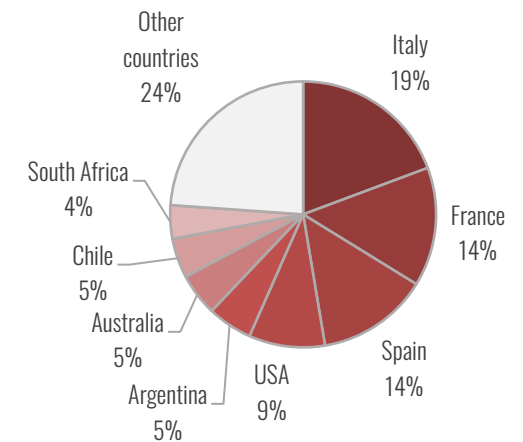
© OIV

Three countries - **Italy, France and Spain** - account for **almost half of the world production**.

Top 8 wine producing countries account for **76% of the total wine produced in 2021**.

EU: 154 mhl in 2021 (-8%/2020), accounting for 59% of the world total

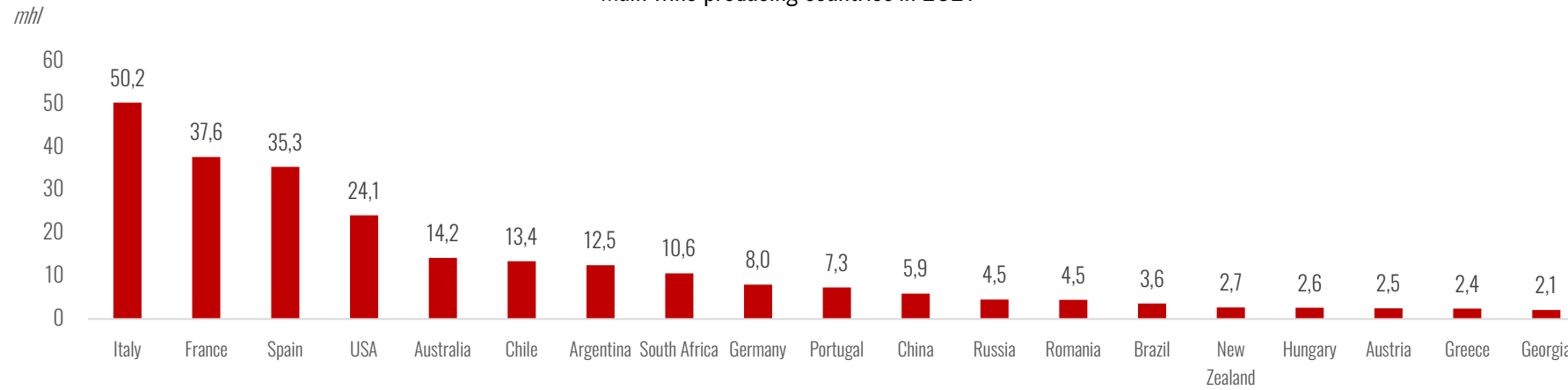
Breakdown of wine production in 2021



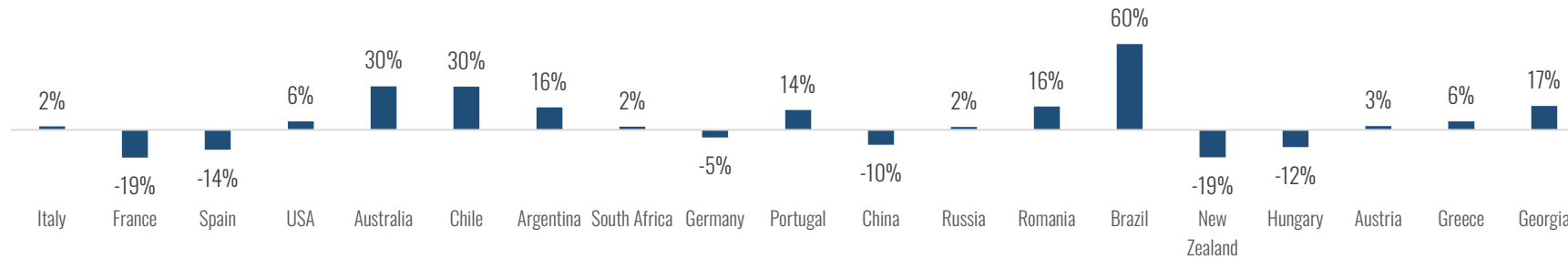


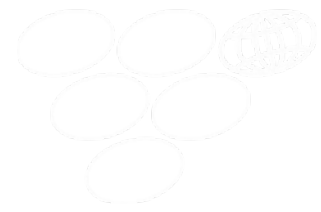
Wine Production

Main wine producing countries in 2021



2021/2020 % Var.



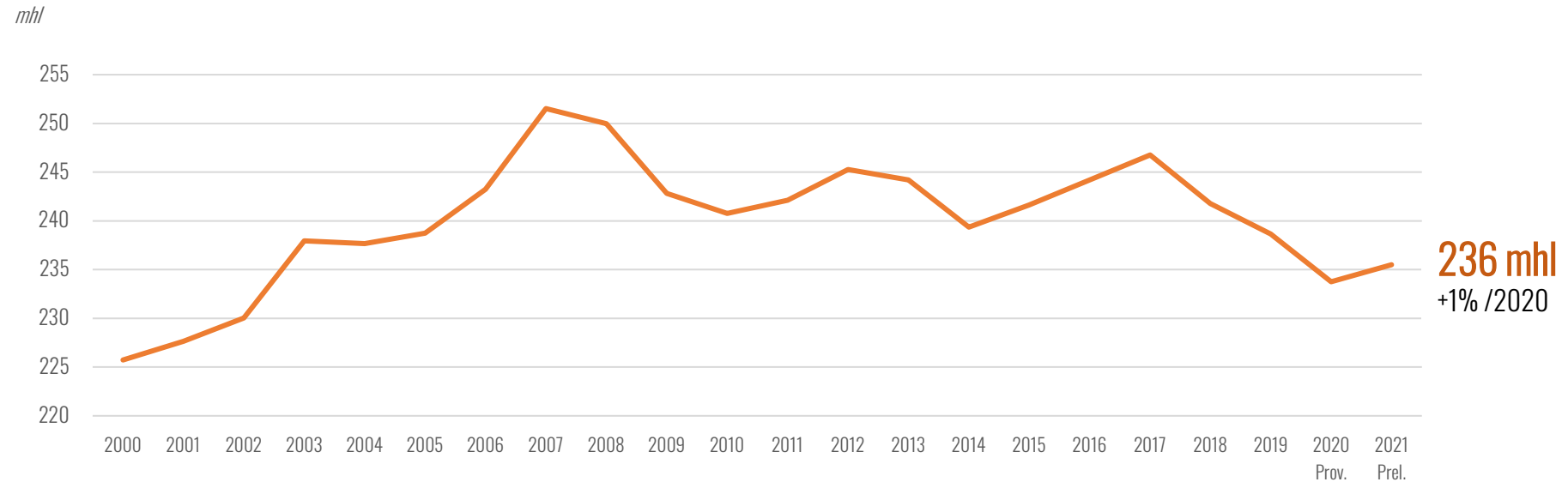


Wine Consumption



Wine Consumption

Evolution of world wine consumption



World wine consumption in 2021 is estimated at 236 mhl, marking an increase of 1% compared 2020, the lowest level recorded since 2002.

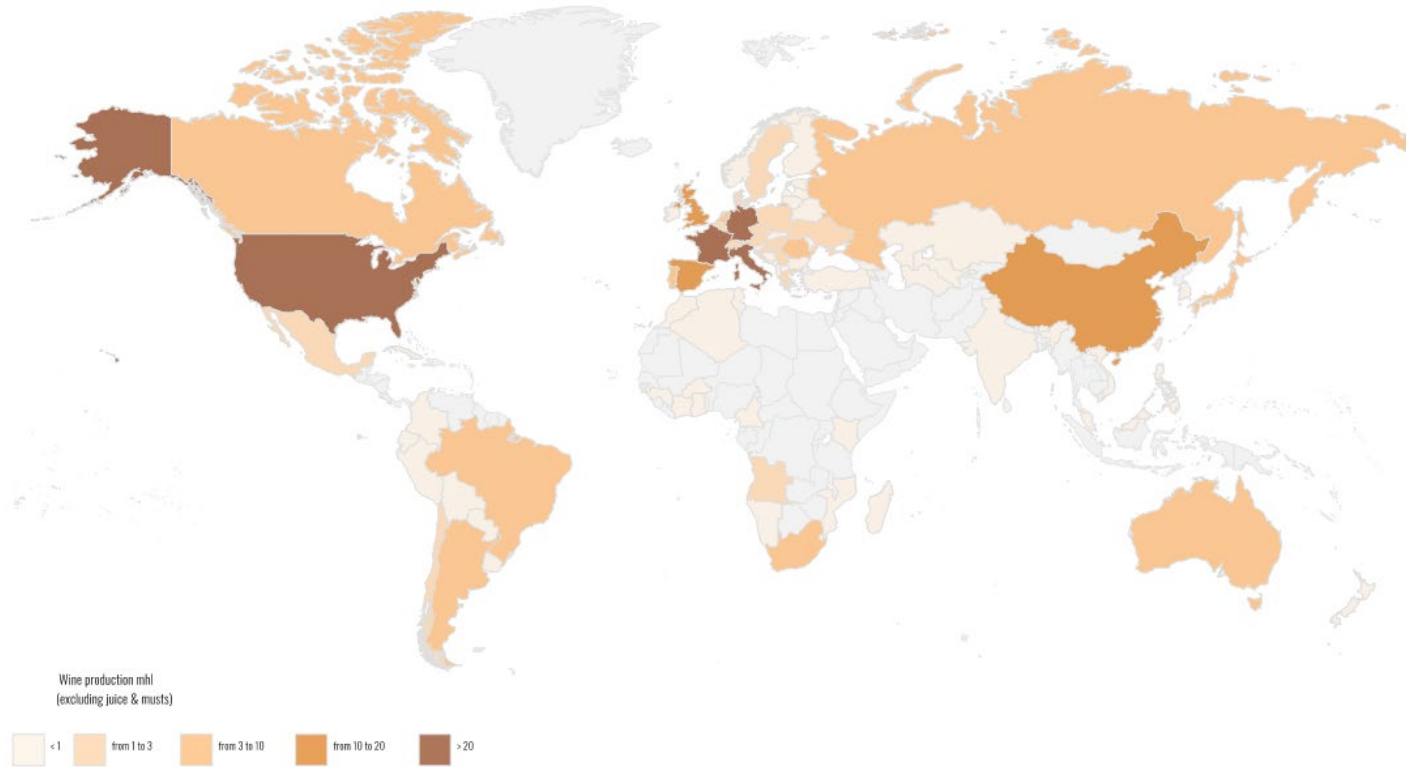
2021 global wine consumption has **inverted the negative trend that started in 2018** with the decline in China's consumption (which has lost on average 2 mhl per year since then). This downward trend was accentuated in 2020 by the covid-19 pandemic, which brought a depressing effect on many large wine markets.

In 2021, the uplifting of Covid-19 related restrictions contributed to an **increase in consumption in most countries around the world**. However, wine consumption behaviours at country level are quite heterogenous across geographical regions.



Wine Consumption

World wine consumption distribution in 2021



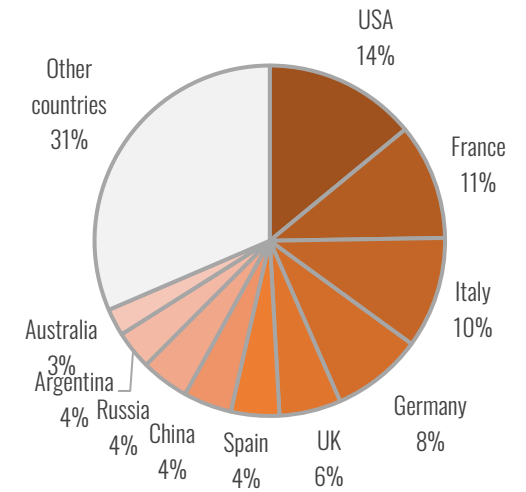
© OIV

In 2021, top 5 countries account for almost **half of the world wine consumption.**

Top 10 countries represent **more than two thirds.**

EU: 114 mhl of wine consumed in 2021 (+3% / 2020), representing 48% of the world consumption.

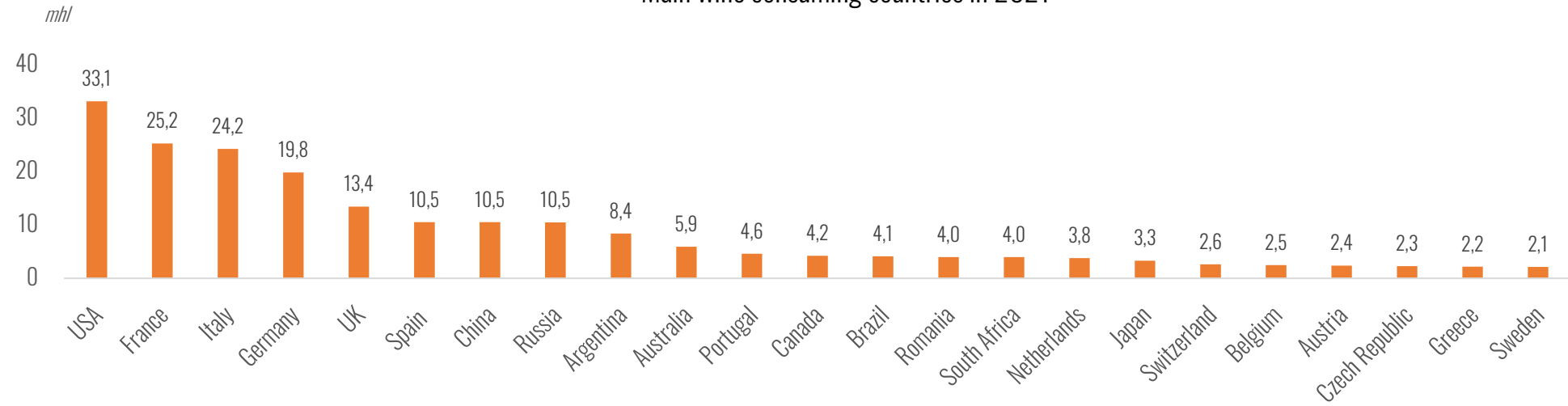
Breakdown of wine consumption in 2020



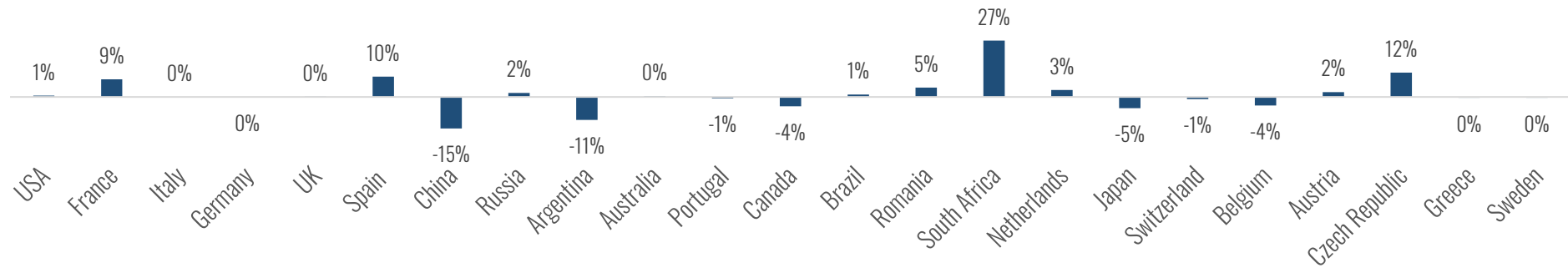


Wine Consumption

Main wine consuming countries in 2021



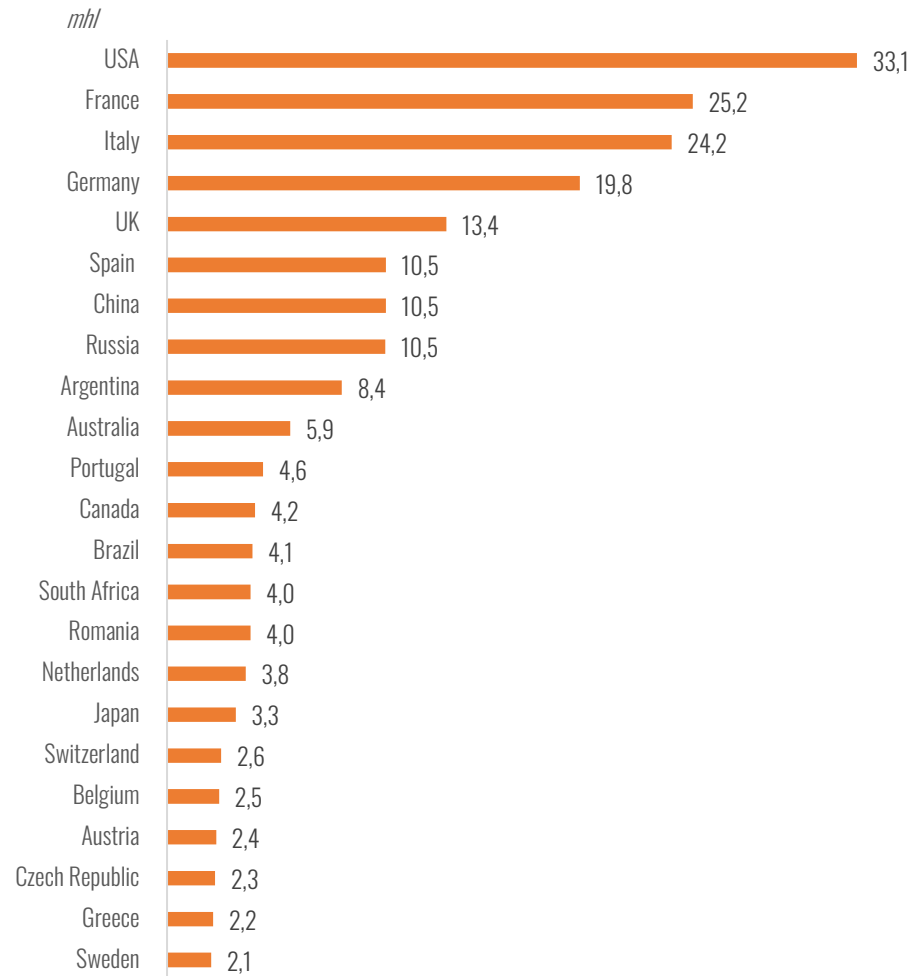
2021/2020 % Var.



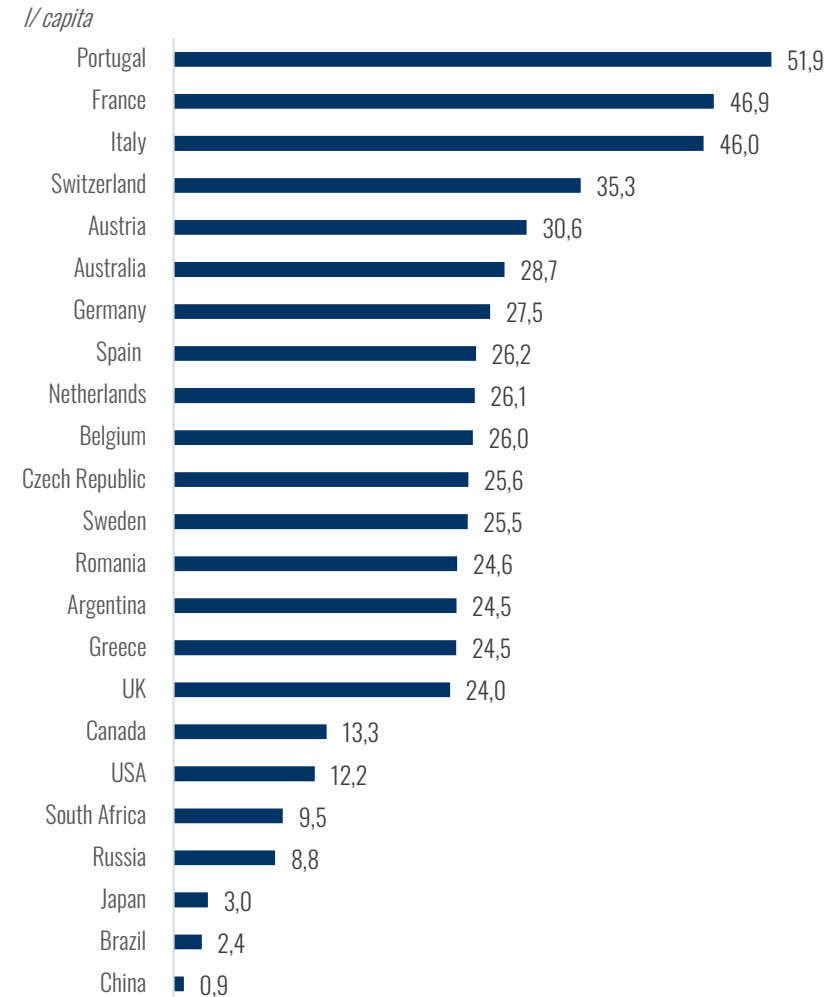


Wine Consumption

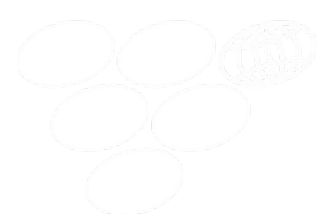
Top countries* by total consumption in 2021



Consumption per capita +15 in top consuming* countries in 2021



*Countries with 2021 wine consumption above 2 mhl

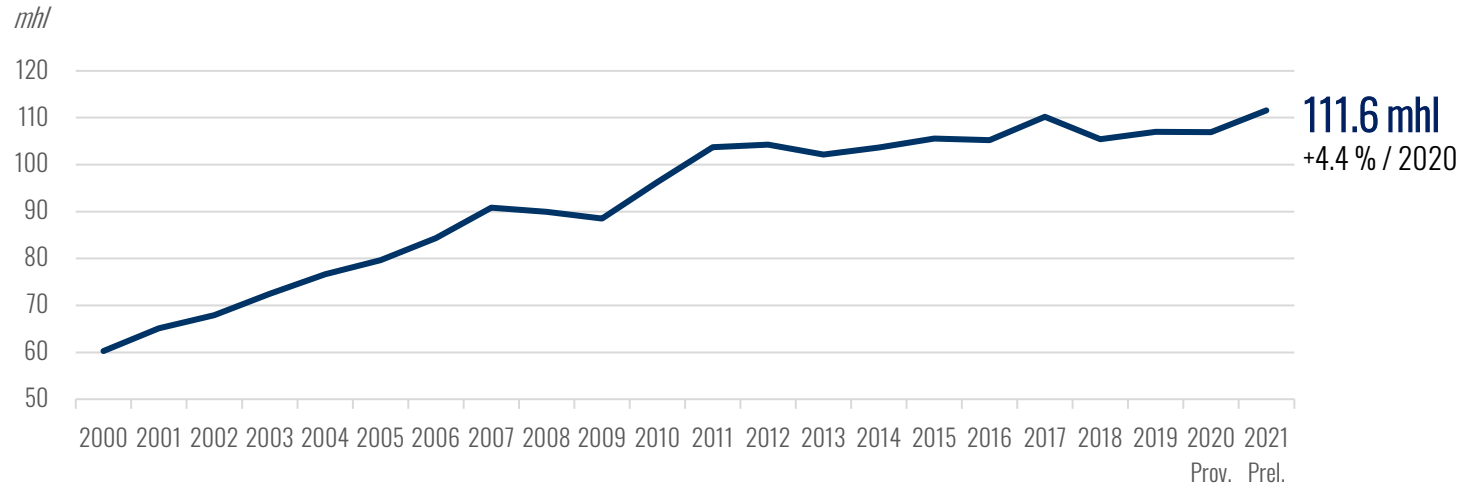


International Trade of Wine



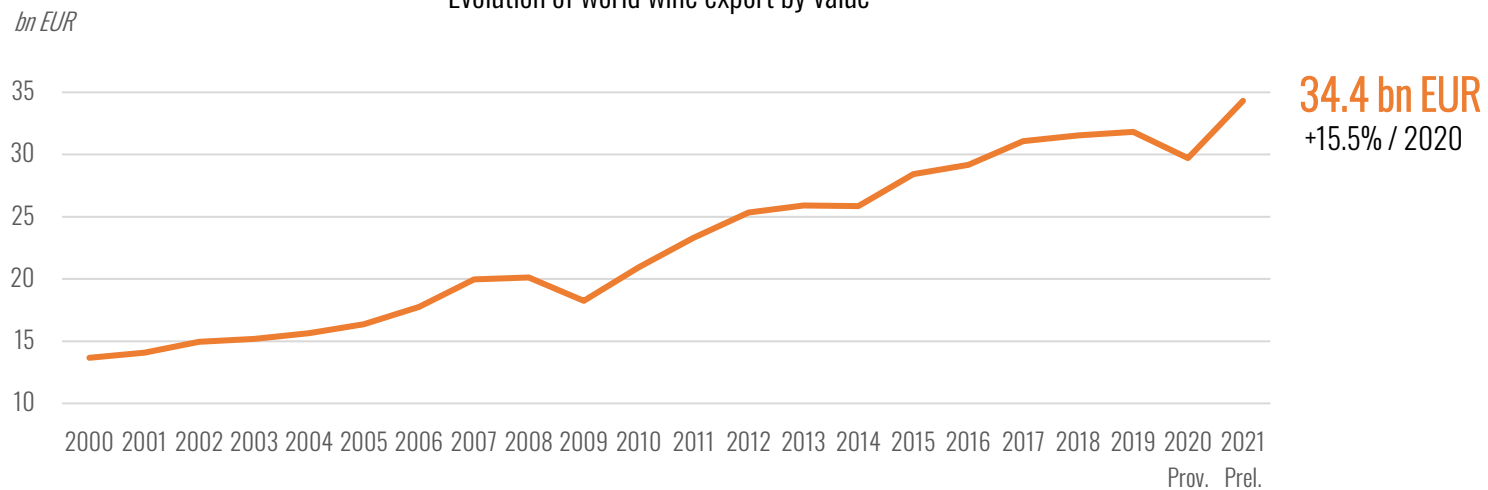
International Wine Trade

Evolution of world wine export by volume



With a volume of 111.6 mhl, world wine exports in 2021 have increased by 4% compared to 2020, recording the largest volume ever

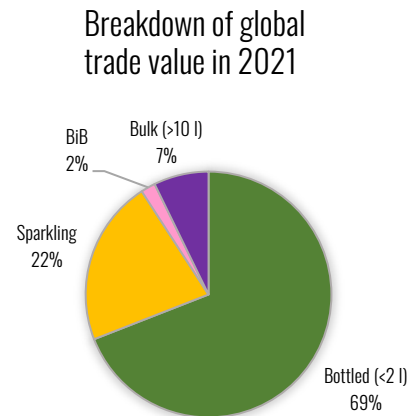
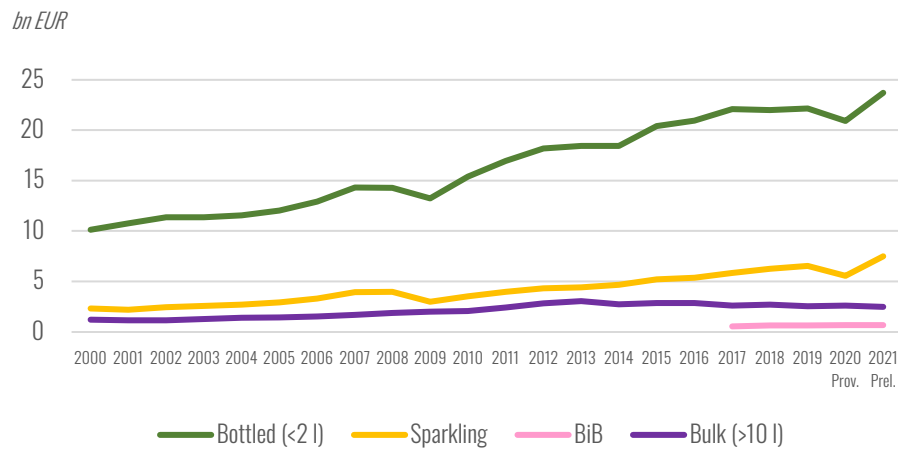
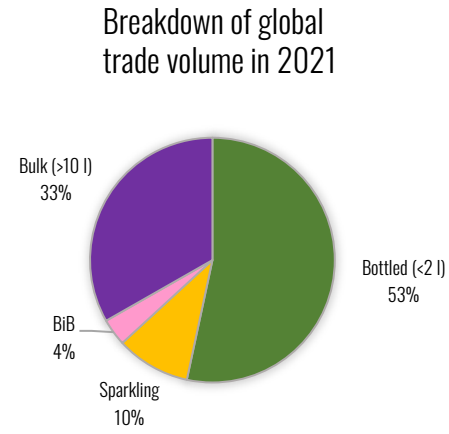
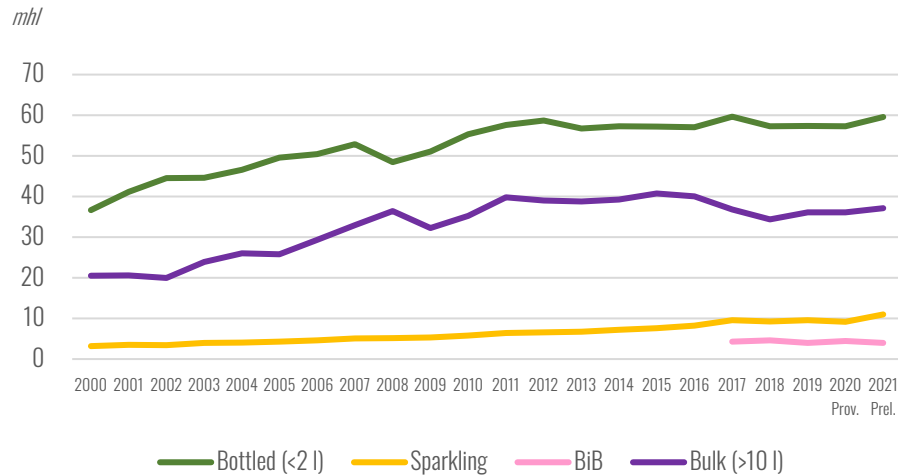
Evolution of world wine export by value



With an even better performance in terms of value, world wine exports in 2021 increased by 16% compared to 2020, reaching 34.3 bn EUR.



International Trade of Wine



Bottled wine:
 Volume: +6% / 2020
 Value: +13% / 2020

Sparkling wine:
 Volume: +22% / 2020
 Value: +35% / 2020

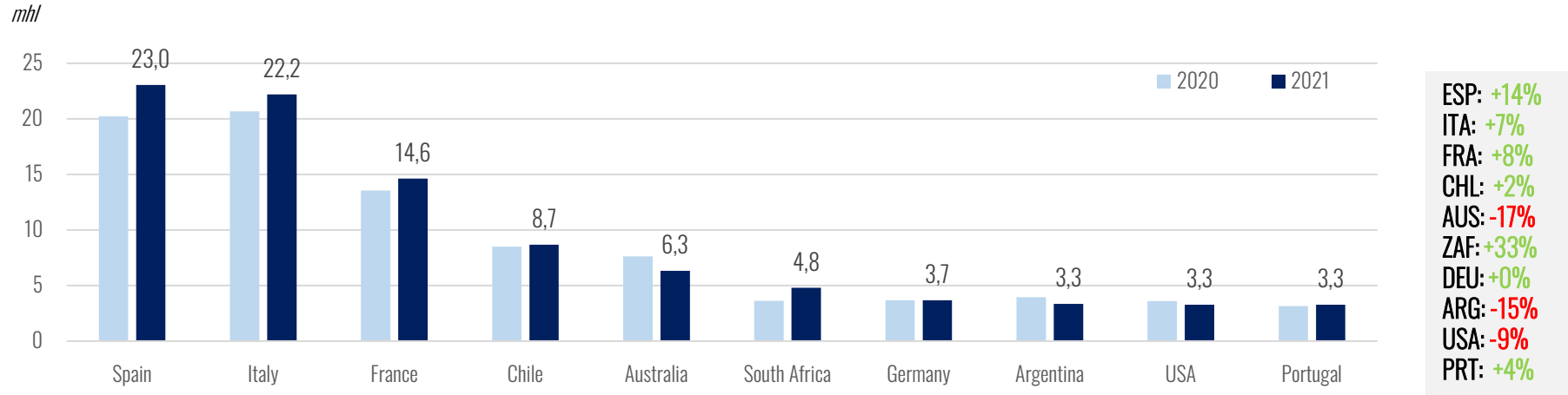
Bag-in-Box (BiB):
 Volume: -8% / 2020
 Value: -1% / 2020

Bulk wine:
 Volume: +5% / 2020
 Value: -5% / 2020

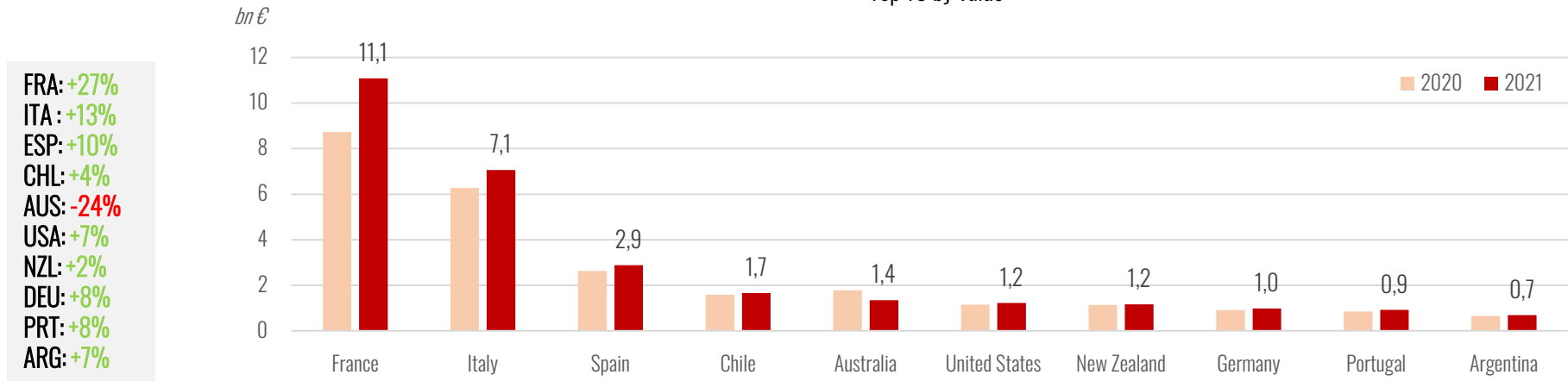


Main Wine Exporters

Top 10 by volume



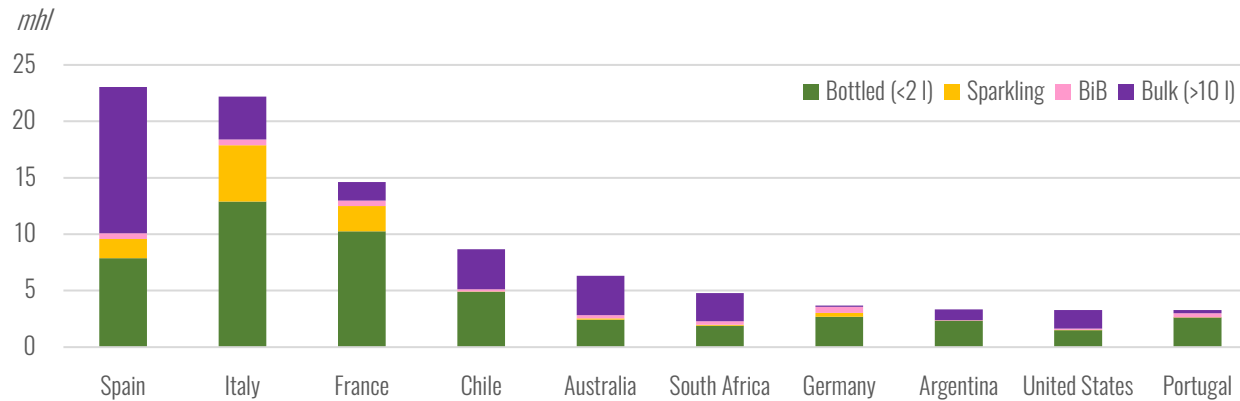
Top 10 by value





Main Wine Exporters

Top 10 by volume



Largest relative shares by volume:

Bottled → Portugal (80%), Germany (73%), France (70%)

Sparkling → Italy (23%), France (15%), Spain (7%)

Bulk → Canada (99%), Spain (56%) and Australia (55%)

BiB → Germany (15%), Portugal, (11%), South Africa (7%)

Largest relative share by value:

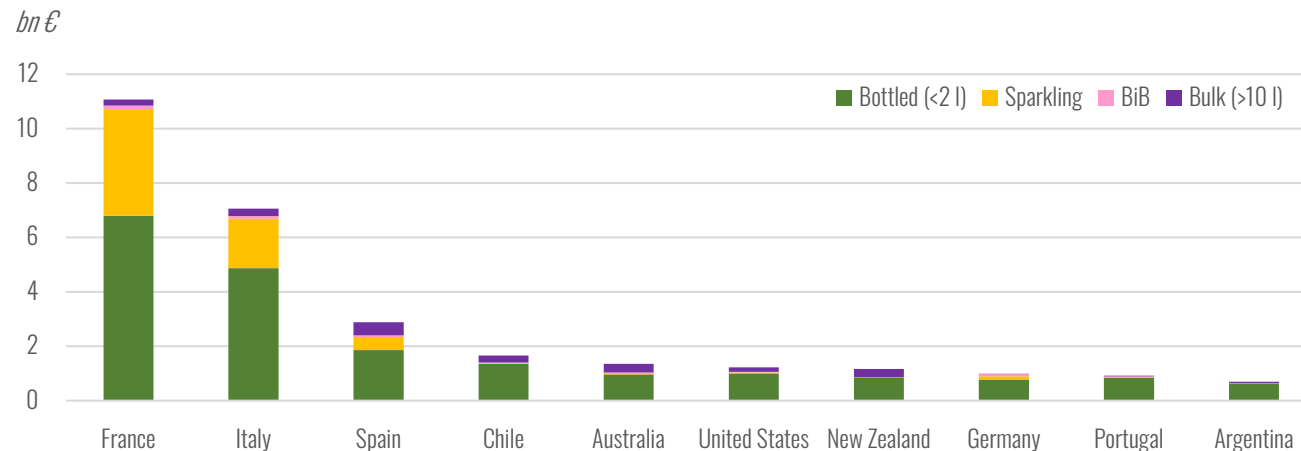
Bottled → Portugal (92%), Argentina (91%) and USA (82%)

Sparkling → France (35%), Italy (26%), Spain 16%

Bulk → Canada (68%), New Zealand (24%), South Africa and Australia (both with 23%).

BiB → Germany (8%), South Africa (8%), Portugal (5%)

Top 10 by value

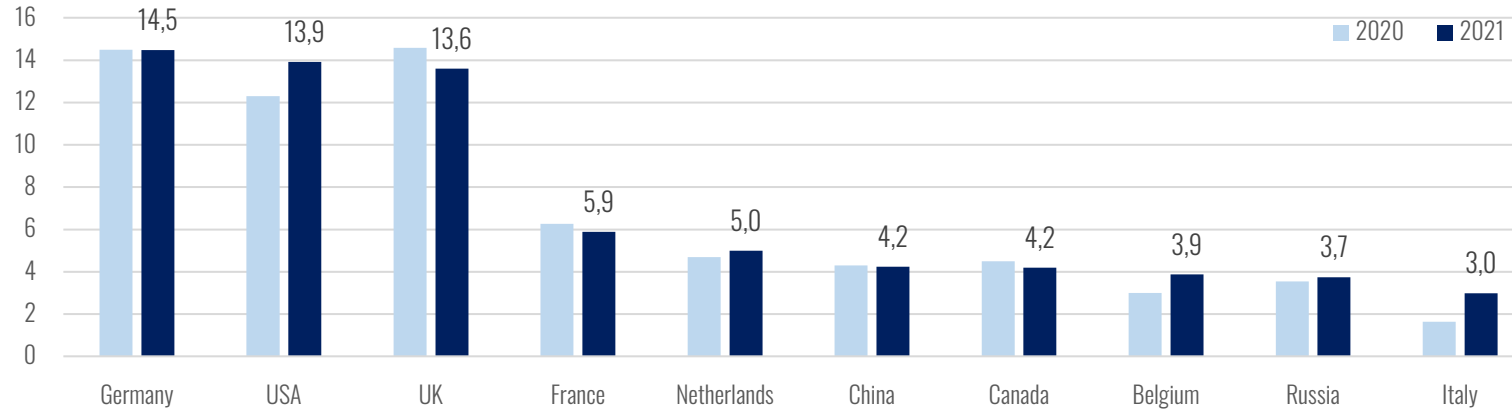




Main Wine Importers

Top 10 by volume

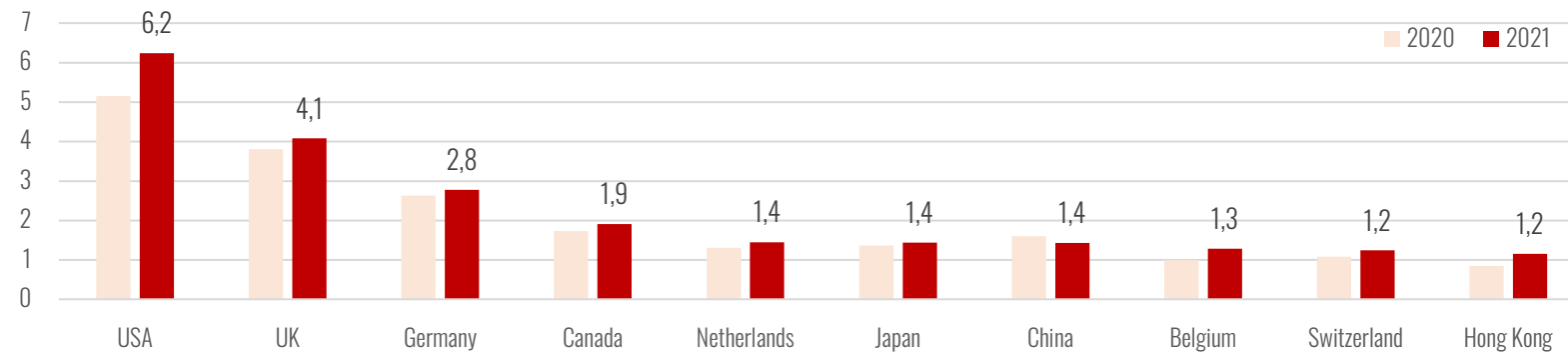
mhl



- DEU: +0%
- USA: +13%
- GBR: -7%
- FRA: -6%
- NLD: +7%
- CHN: -1%
- CAN: -7%
- BEL: +29%
- RUS: +6%
- ITA: +83%

Top 10 by value

bn EUR

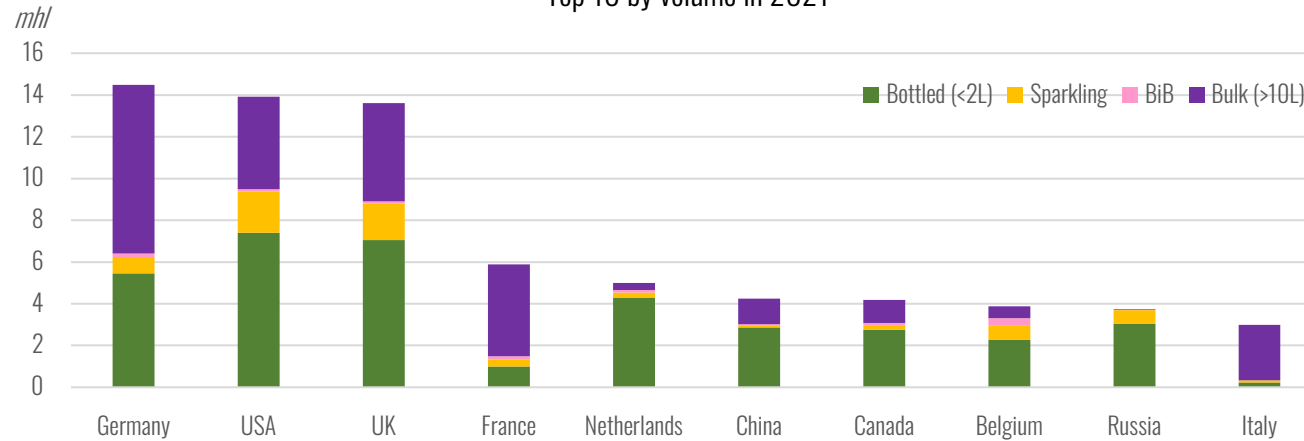


- USA: +21%
- GBR: +7%
- DEU: +6%
- CAN: +10%
- NLD: +11%
- JPN: +5%
- CHN: -11%
- BEL: +29%
- CHE: +15%
- HKG: +37%



Main Wine Importers

Top 10 by volume in 2021



Largest relative shares by volume:

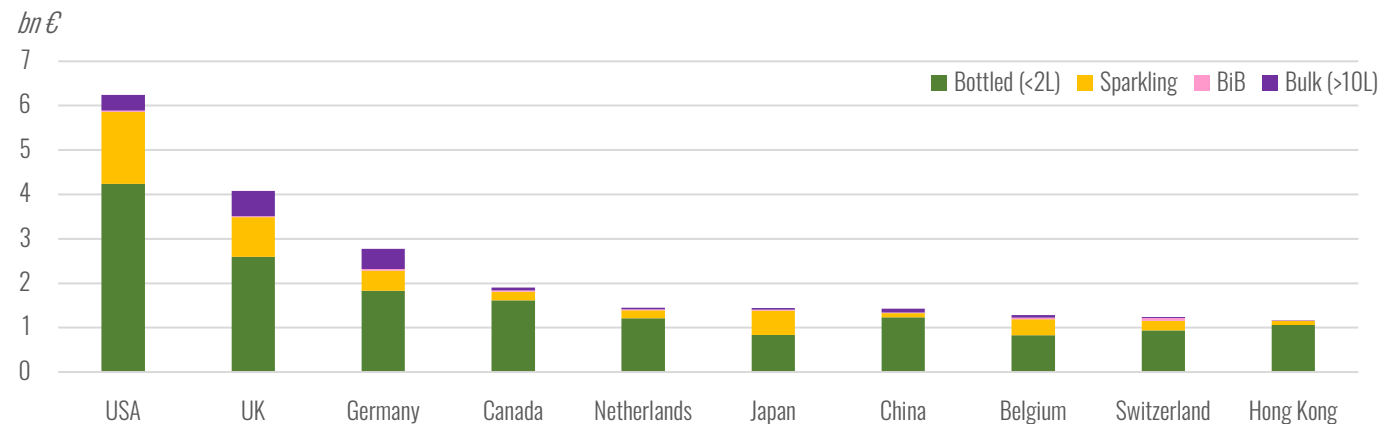
Bottled → Netherlands (86%), Russia (81%), China (68%)

Sparkling → Belgium (19%), Russia (17%), USA (14%)

Bulk → Italy (89%), France (75%), Portugal (73%)

BiB → Sweden (27%), Belgium (8%), Japan (7%)

Top 10 by value in 2021



Largest relative shares by value:

Bottled → China (86%), Canada (85%), Netherlands (84%)

Sparkling → Italy (58%), Japan (38%), Belgium (28%)

Bulk → Portugal (50%), France (24%), Italy (21%)

BiB → Sweden (14%), Belgium (3%), Portugal (2%)



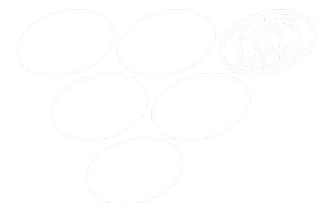
Market Internationalisation Index



The wine **market internationalisation index** is constructed as the ratio between the volumes of world wine exports and world wine consumption.

In 2021, the wine market internationalisation index is at 47%, meaning that on average in 2021, of every 2 bottles of wine consumed in the world about 1 has crossed (at least) one border, that is **half the wine consumed in the world is imported wine**.

This index has risen for the third consecutive year.



Wine Production in the Southern Hemisphere in 2022

First Estimates



Southern Hemisphere Wine Production 2022

	Prov. 2021	Prel. 2022	Trend 2022	% Var. 22-21	Trend 2000-2022
Argentina	12 482	10 850	↓	-13.1%	
Australia	14 196	13 450	↓	-5.3%	
Brazil	3 600	3 240	↓	-10.0%	
Chile	13 436	12 100	↓	-9.9%	
New Zealand	2 664	3 000	↑	12.6%	
South Africa	10 609	10 650	↑	0.4%	



INTERNATIONAL ORGANISATION OF VINE AND WINE

**THANK YOU FOR
YOUR ATTENTION**