

Punta del Este, November 19th, 2018

State of the Vitiviniculture World Market

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Director General

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Topics

- Potential of viticultural production
- Production of grapes
- Production of wine
- Consumption of wine
- International wine trade

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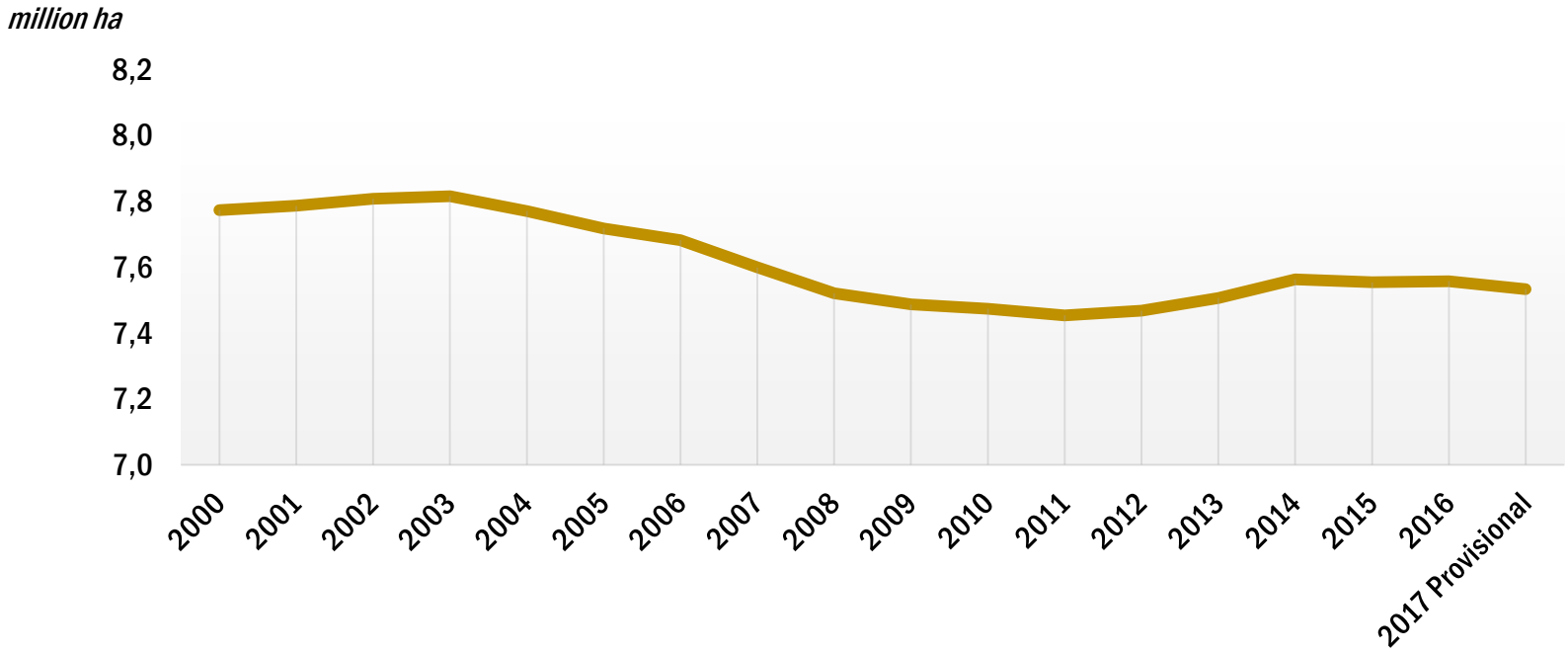
International Organisation of Vine and Wine

Vineyard Surface Area

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The Potential of Viticultural Production

Evolution of the world area under vines*



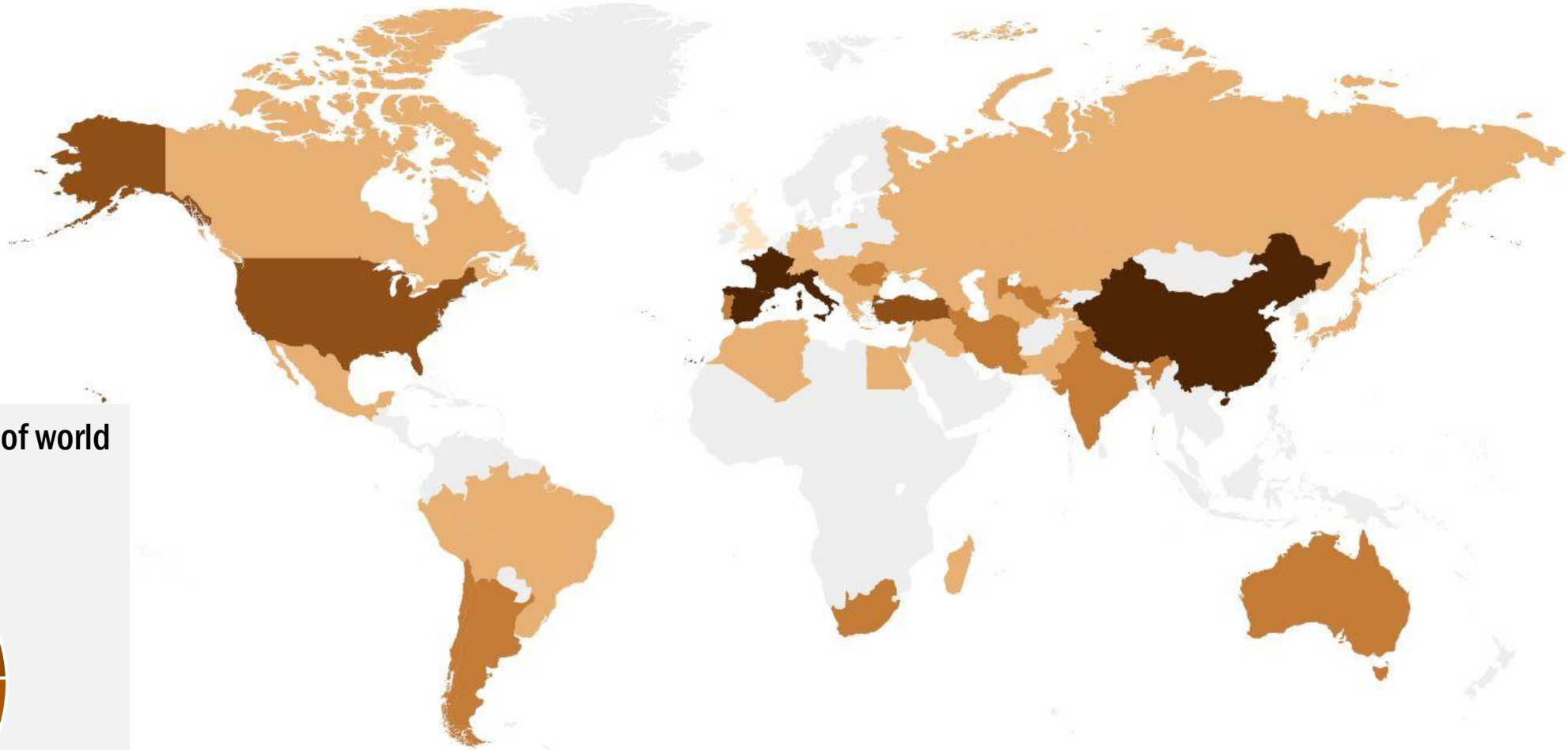
7.5 million ha
in 2017

Since 2014 world **vineyards have stabilised** at around 7.5 million hectares

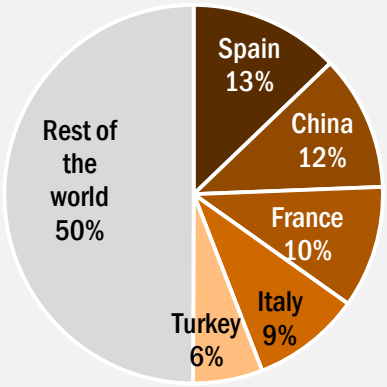
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*Vineyards destined for the production of all type of grapes, both bearing and non-bearing.

Vineyards Surface Area*



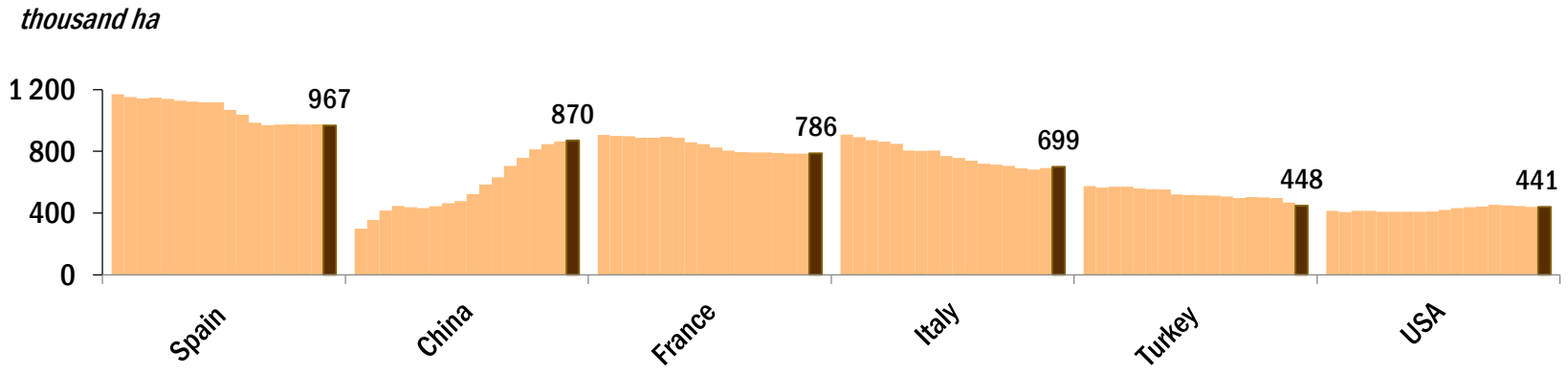
5 countries represent half of world vineyard

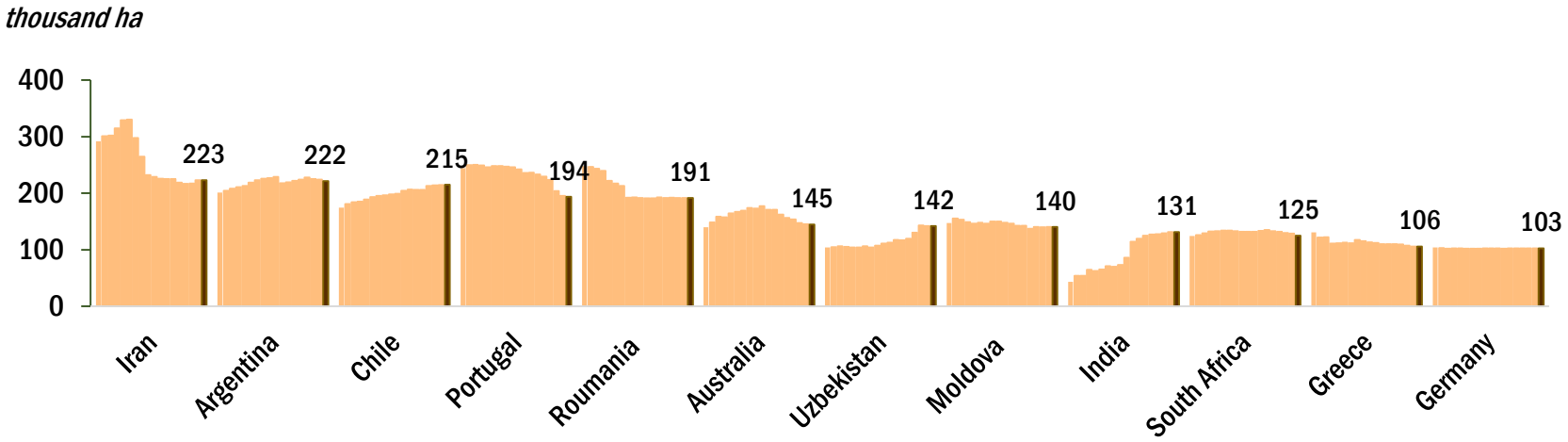


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*Vineyards destined for the production of all type grapes, both bearing and non-bearing

Vineyard Surface Area Trends, 2000-2017





Since 2000:

- Surface area decreases mainly concentrate in Europe, Turkey and Iran
- Significant growth of Chinese vineyard area
- Stabilisation in the USA and the majority of countries in the Southern Hemisphere

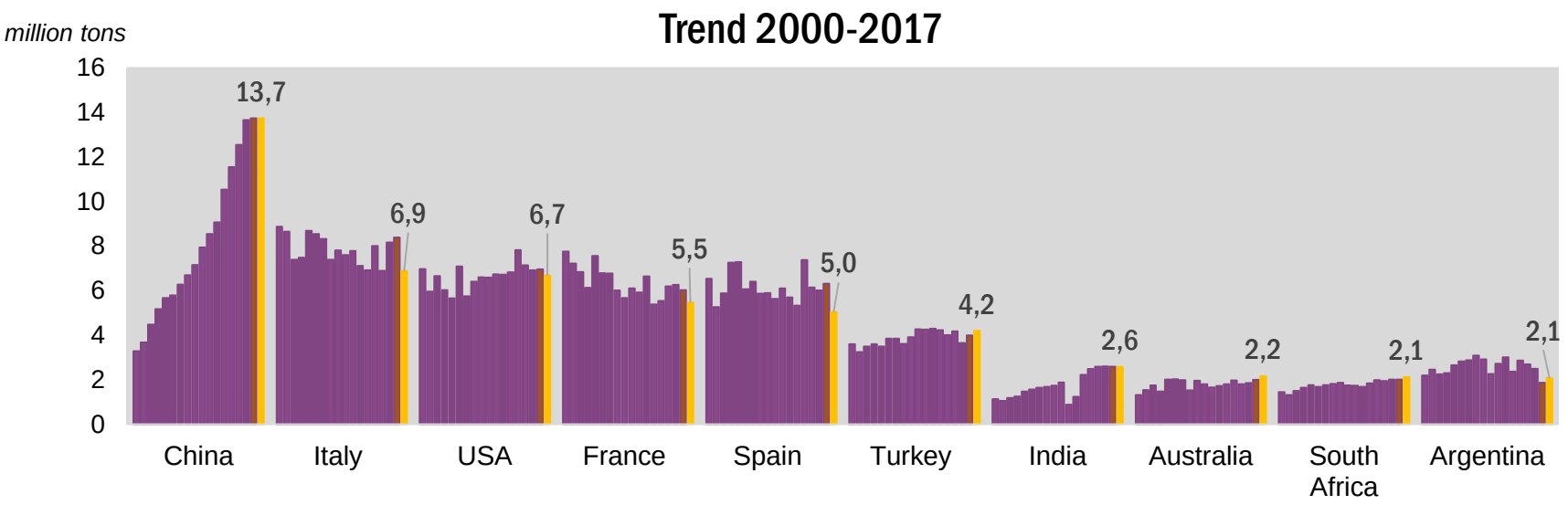
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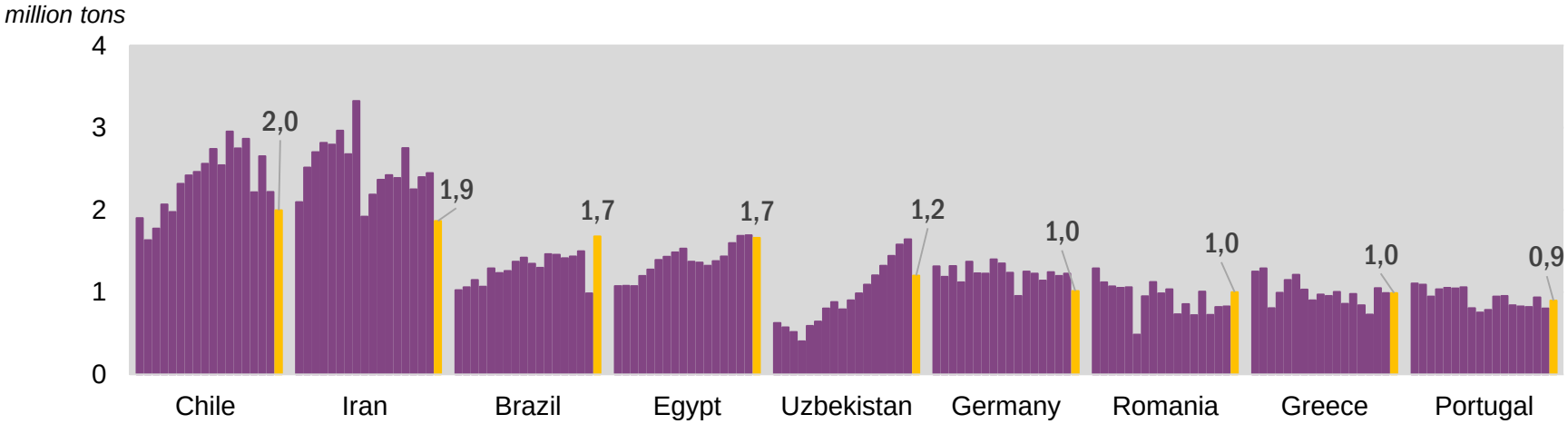


Grapes Production

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Major grapes producers (all uses)

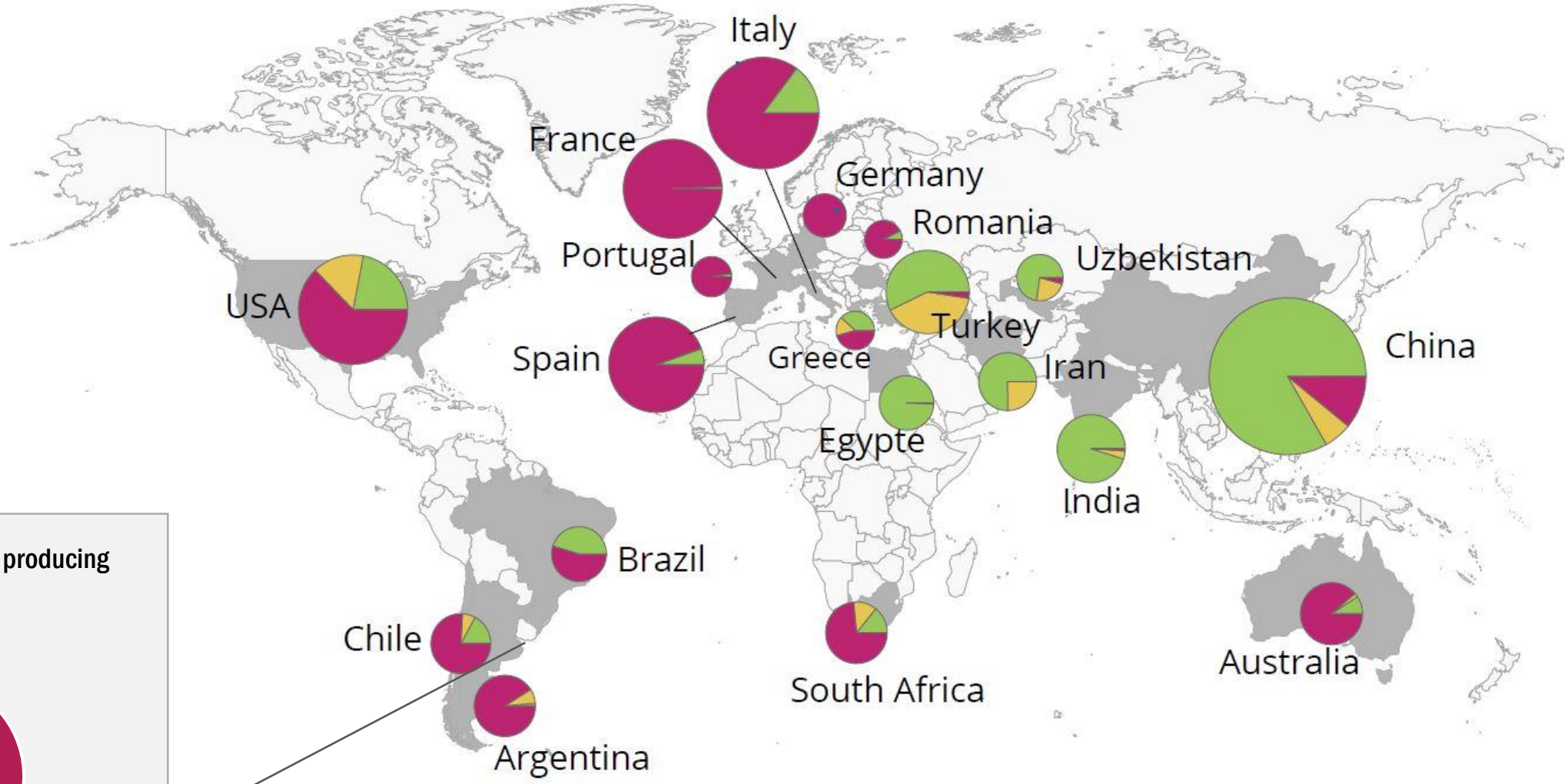




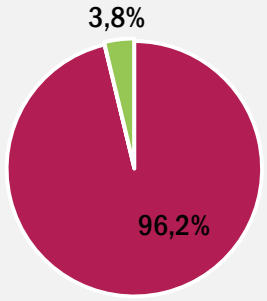
Since 2000:

- Consistent **growth** in mainly table grape producing countries such as China, India, Egypt and Uzbekistan
- **Decreasing trend or stabilations** in traditional wine making countries such as Italy, France, and Spain

Major grape producers in 2017

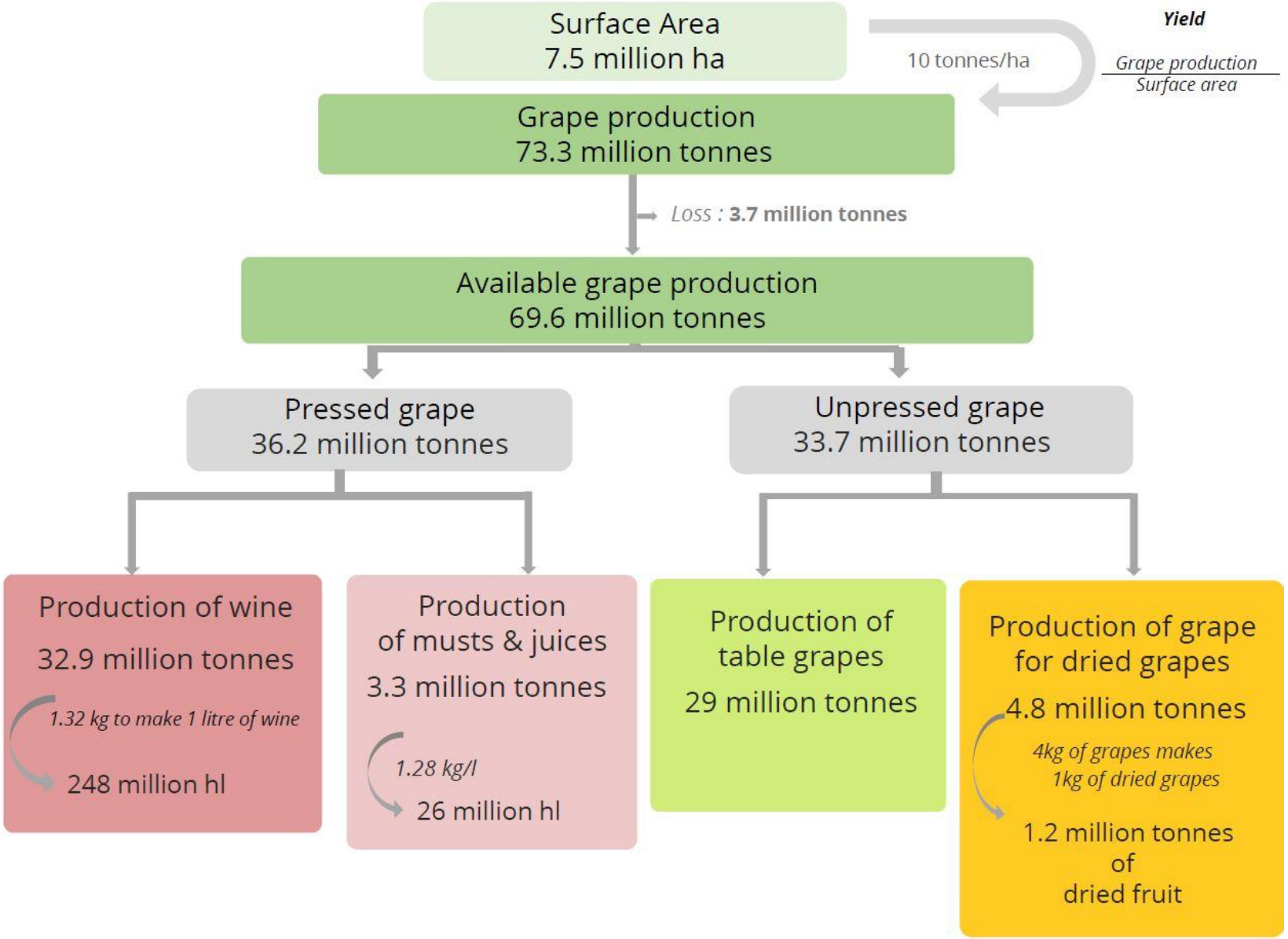


Uruguay is the 48th grape producing country in the world



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What happens to the 73.3 million tons of grapes harvested in 2017?



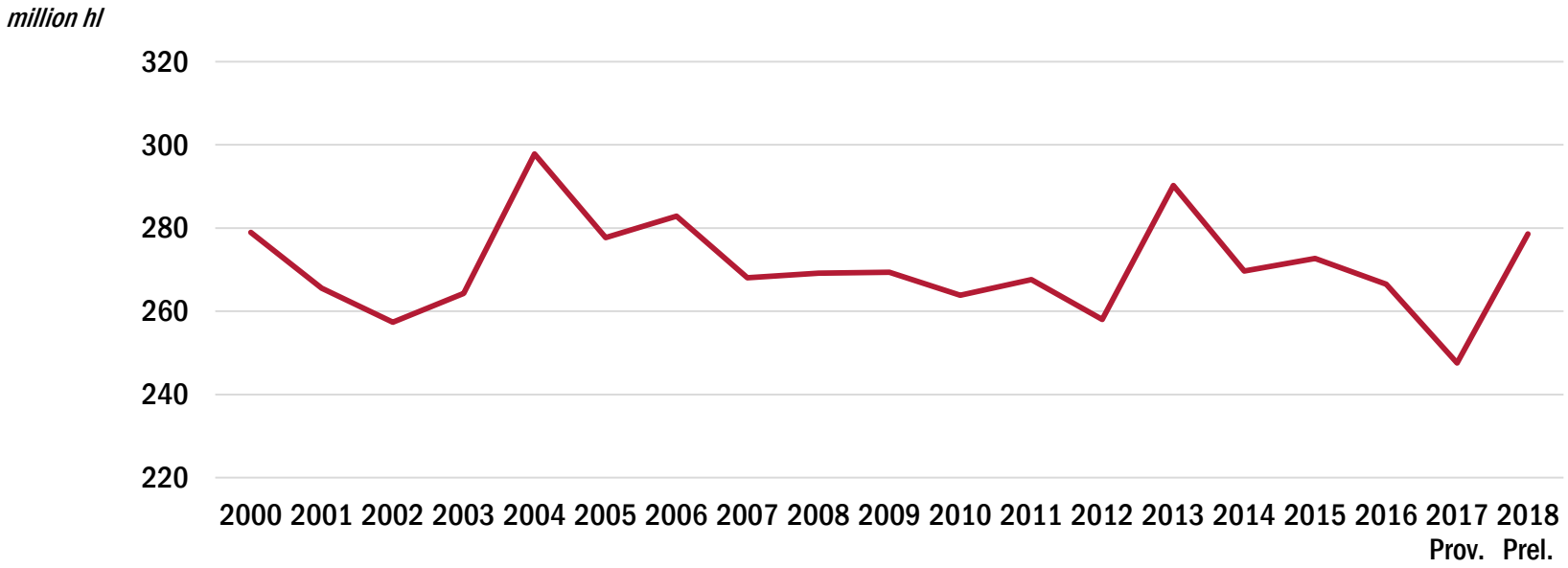
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Wine Production

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World Production of Wine



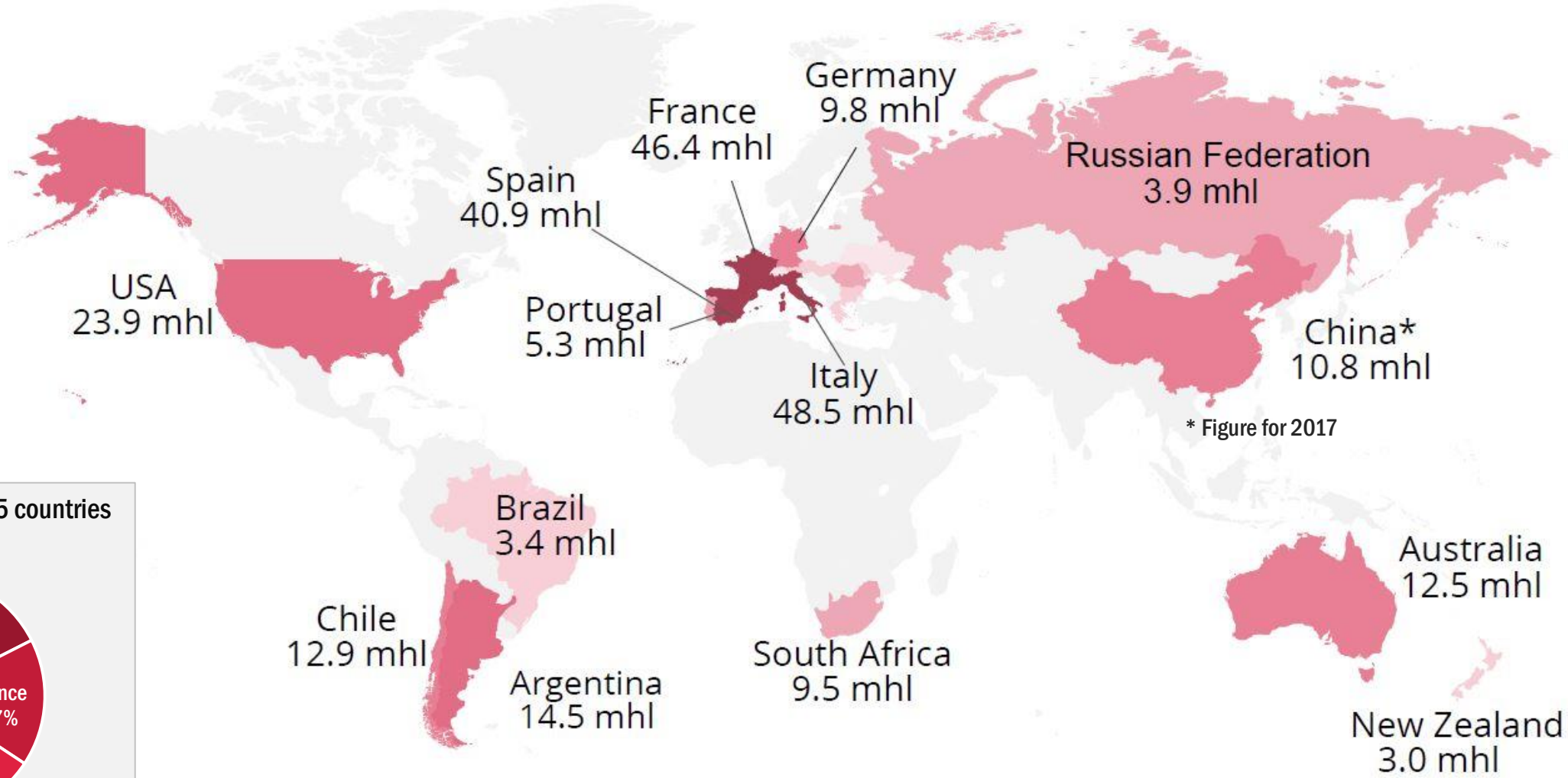
279 million hl

preliminary estimate for 2018

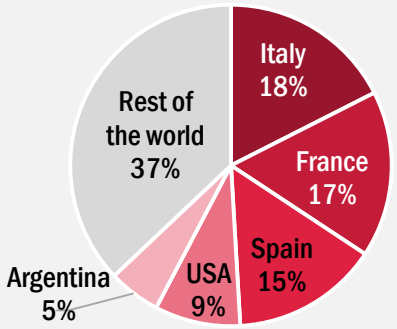
With a 13% increase comprared to 2017, wine production (excluding juice & musts) in 2018 is estimated to be one of the highest since 2000

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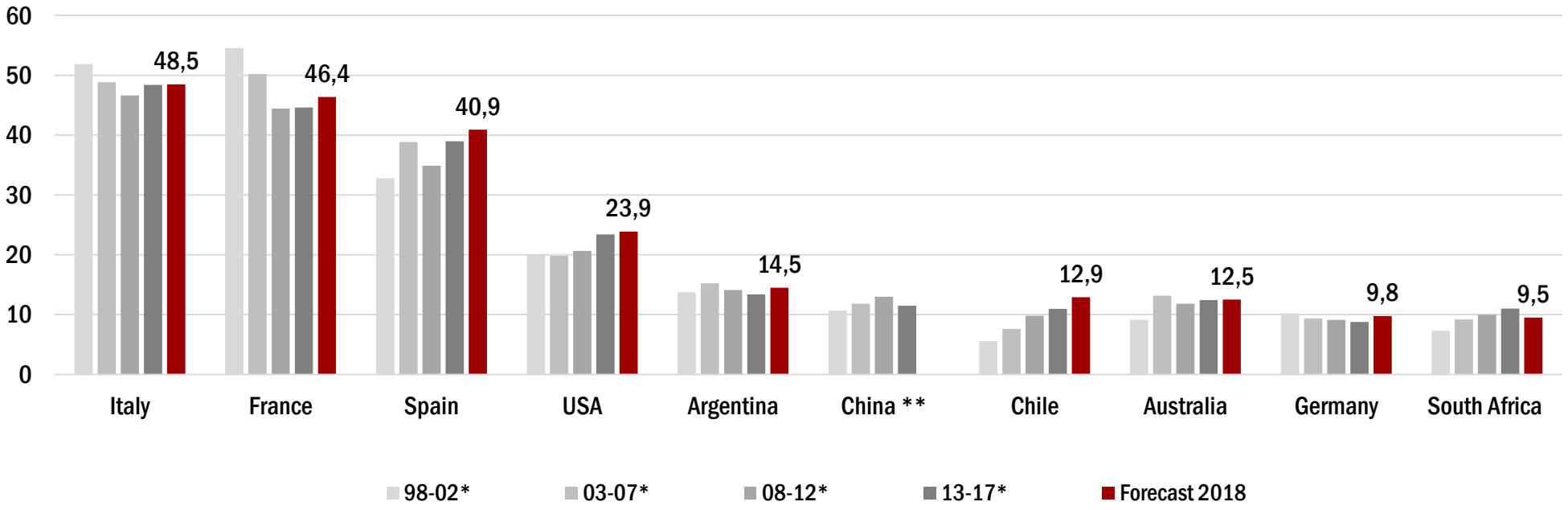
Wine Production in 2018



63% of wine is produced in 5 countries



Top 10 Wine Producers



In 2018:

- **High** production levels in major producing countries in **Europe** and the **Americas**
- **Average** production levels in **Oceania** and **South Africa**

*Five-year Olympic average
** 2018 Figure not yet available

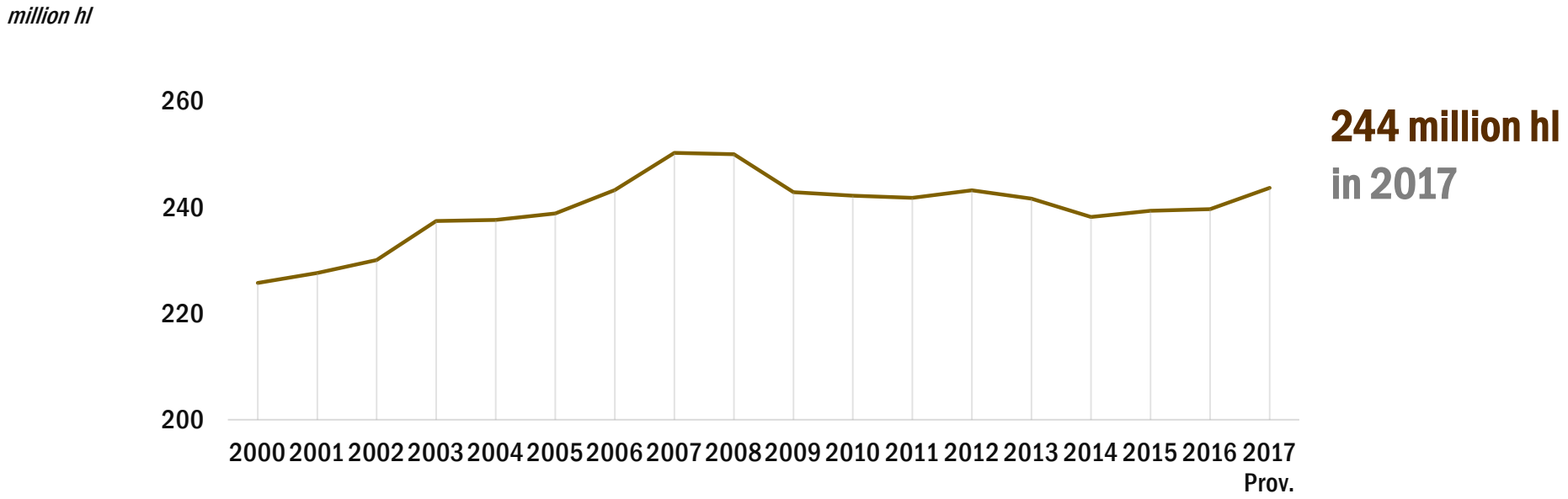
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International Organisation of Vine and Wine

Wine Consumption

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World Wine Consumption



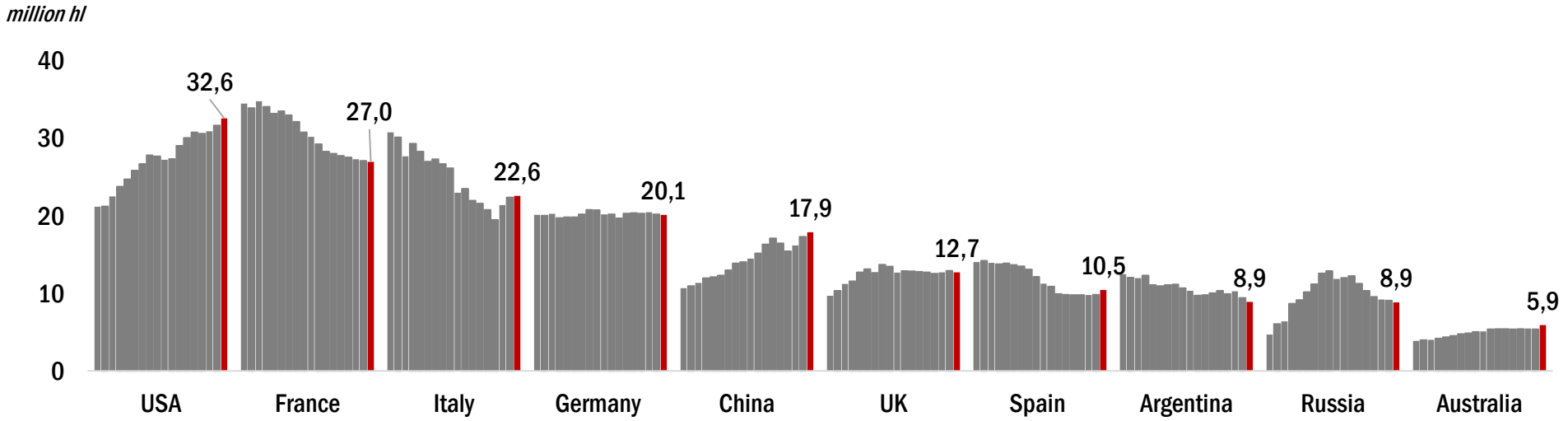
244 million hl
in 2017

- **Global wine consumption** has quasi-stabilised after the economic crisis of 2008 at around 240-245 mhl
- Positive trend since 2014 mainly driven by the increase in wine consumption in Asia and in Western Europe

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Top 10 Wine Consumers

Trend 2000-2017



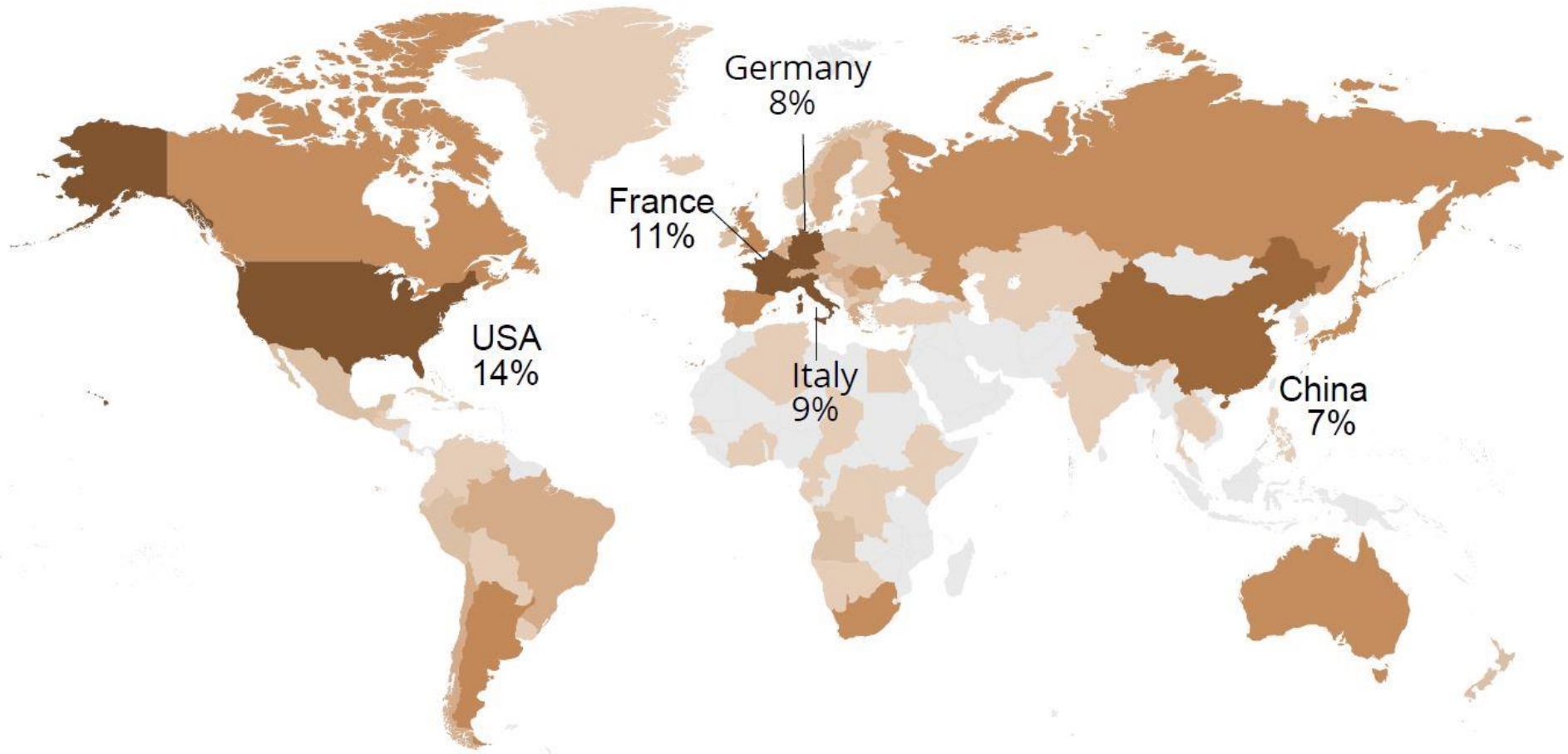
In 2017:

- **USA continues to increase** its consumption and confirms its place as the world's largest consumer
- **Consumption increased slightly** in **Italy** and in **China**
- Consumption **quasi stable** in **France**, **Germany, UK** and **Spain**

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World Wine Consumption

5 five countries consume half of the world's wine

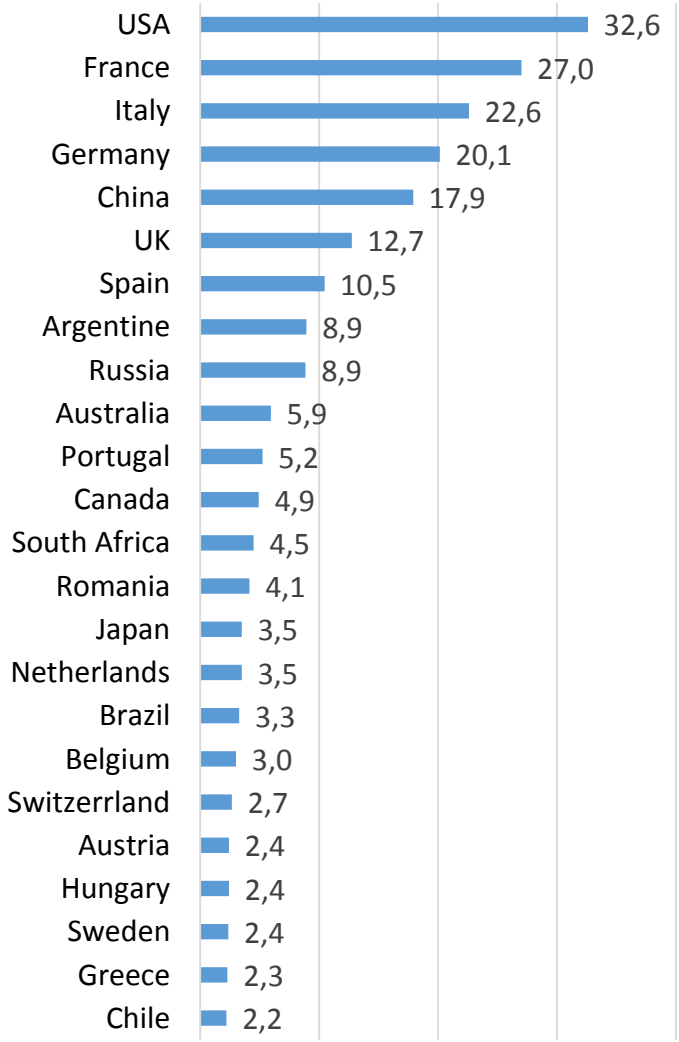


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Wine Consumption in 2017

Total consumption

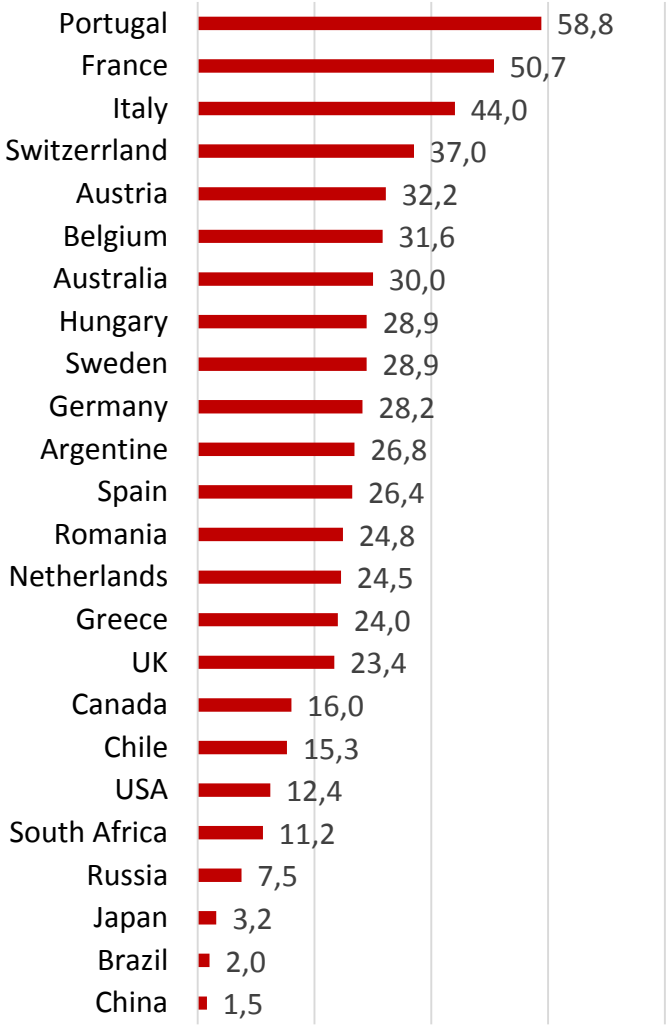
millions hl



Breakdown of these countries by consumption per capita

Per capita (+15) consumption

litres per capita



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OIV Focus 2018

Industrial Use of Wine



Focus 2018

Industrial use of wine

Why this report?

Understand the breakdown of the ~12%(~33 Mhl) of wine produced and utilised industrially each year

What is the industrial use of wine?

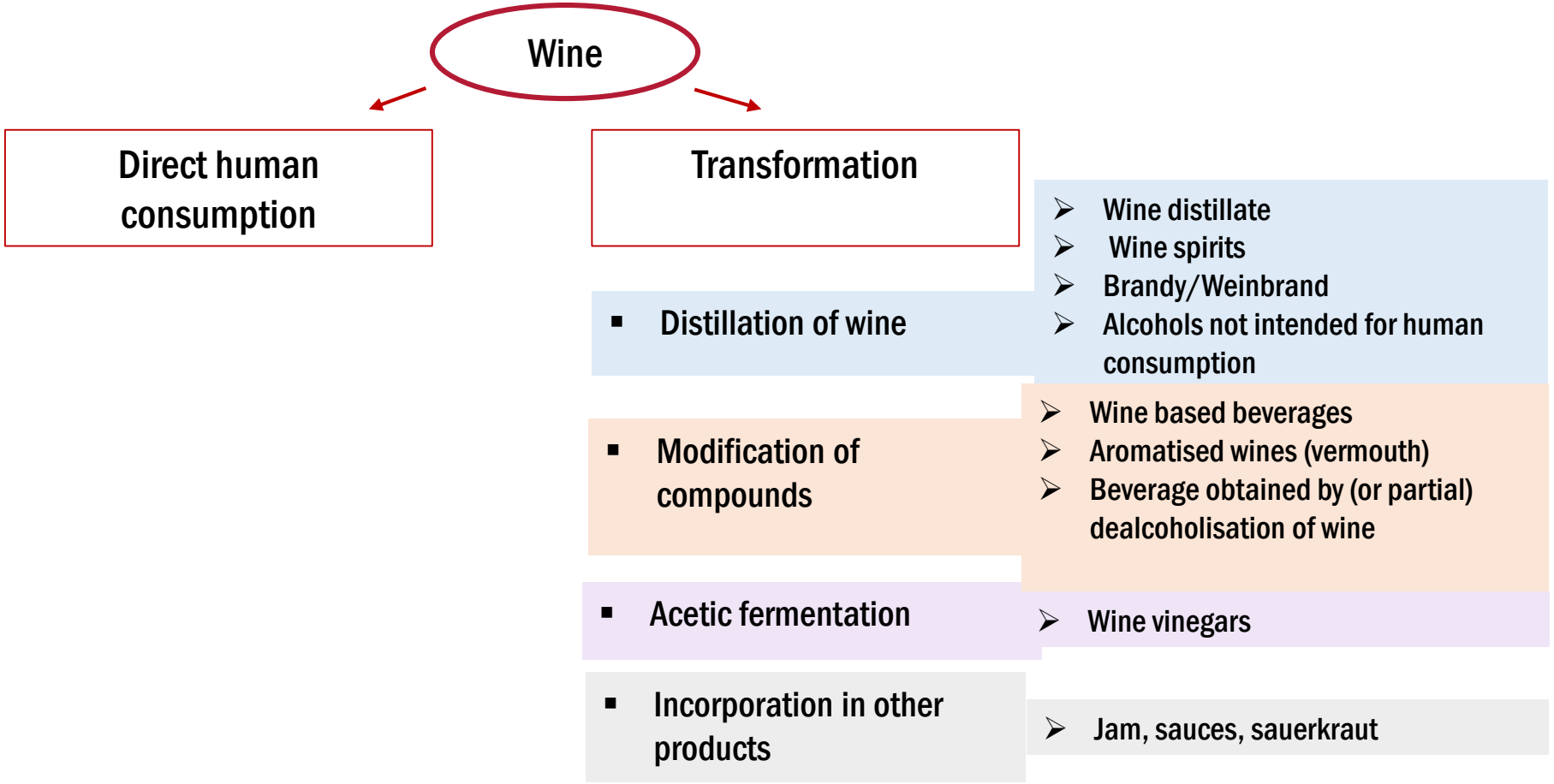
Industrial use of wine is intended to be a transformation of wine (eg. distillation, acetic fermentation, modification of compounds, etc.)

Products covered

- wine distillate, wine spirits, brandy
- aromatised wines, wine based beverages
- wine vinegars

Focus 2018

Industrial use of wine



Objective of the study

- To provide information on various industrial outputs of wine production
- To improve each country's vitivinicultural balance sheet, making detailed analyses of its wine utilization
- First attempt to evaluate at world level the market of industrial products derived from wine (such as vermouth, brandy, wine based beverages, etc.)



International Trade of Wine

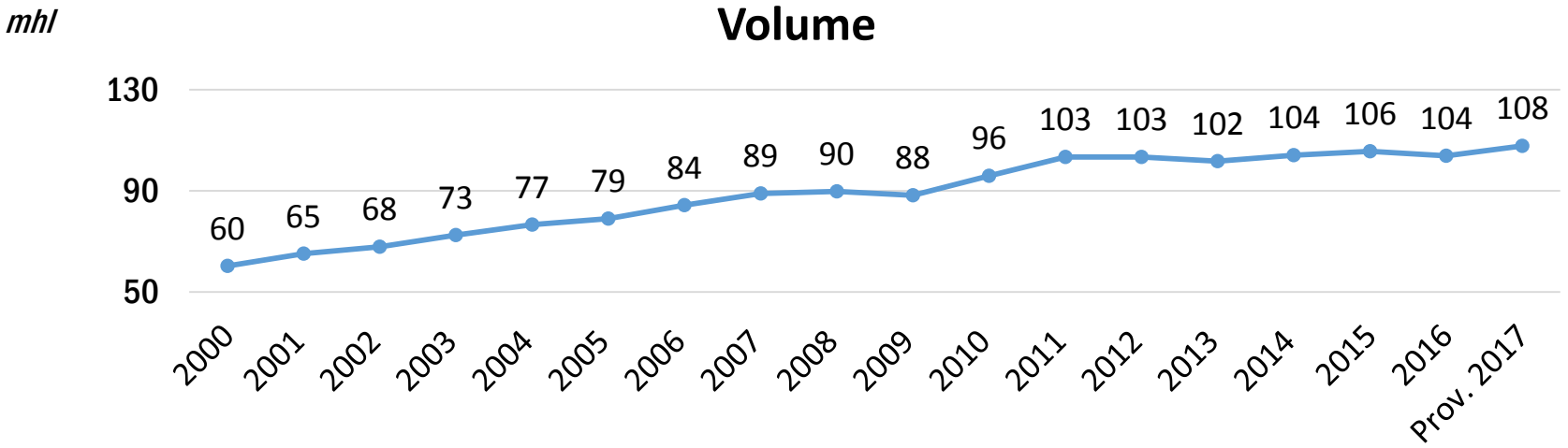
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Global Wine Trade

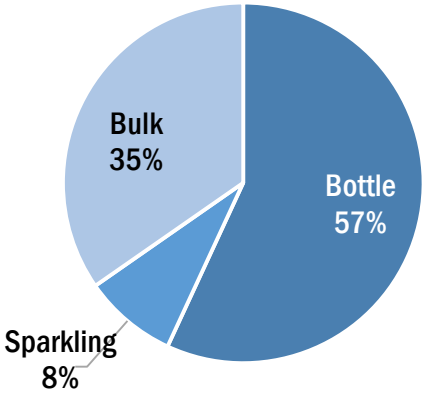
Increase of 3.9%/2016 by volume (108 mhl)

Increase of 5.1%/2016 by value (30 bn EUR)

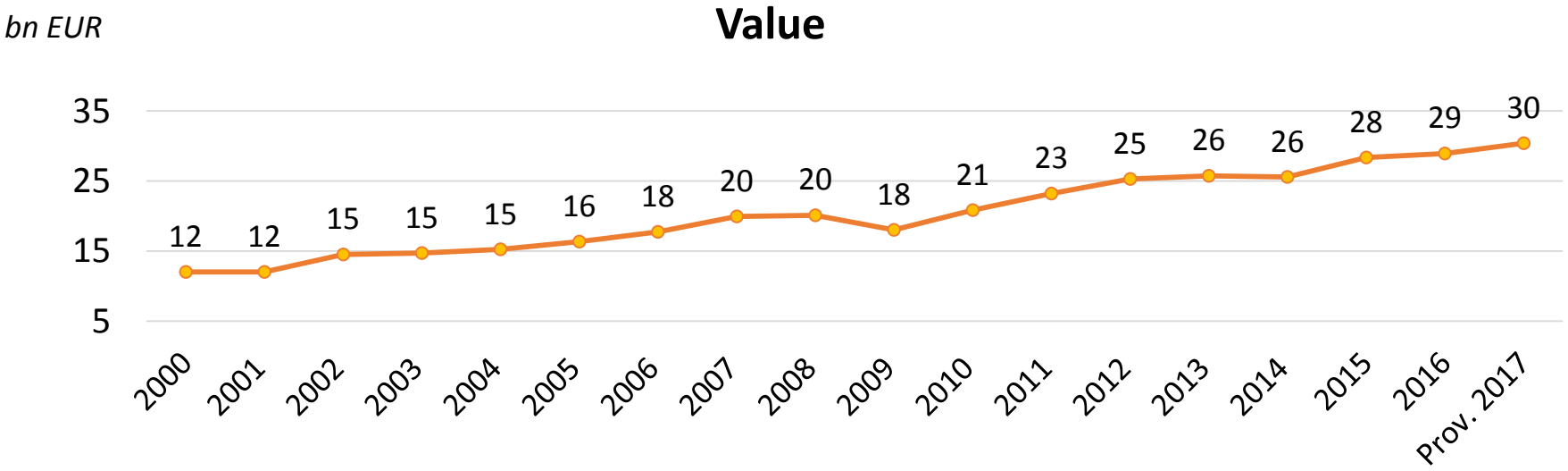
Volume



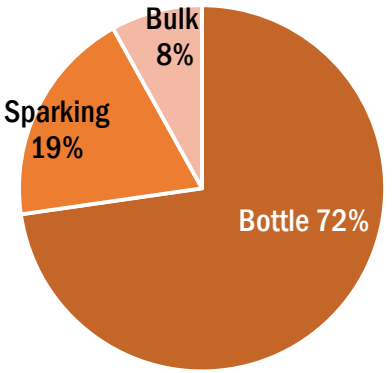
Trade volume by type of product in % 2017



Value

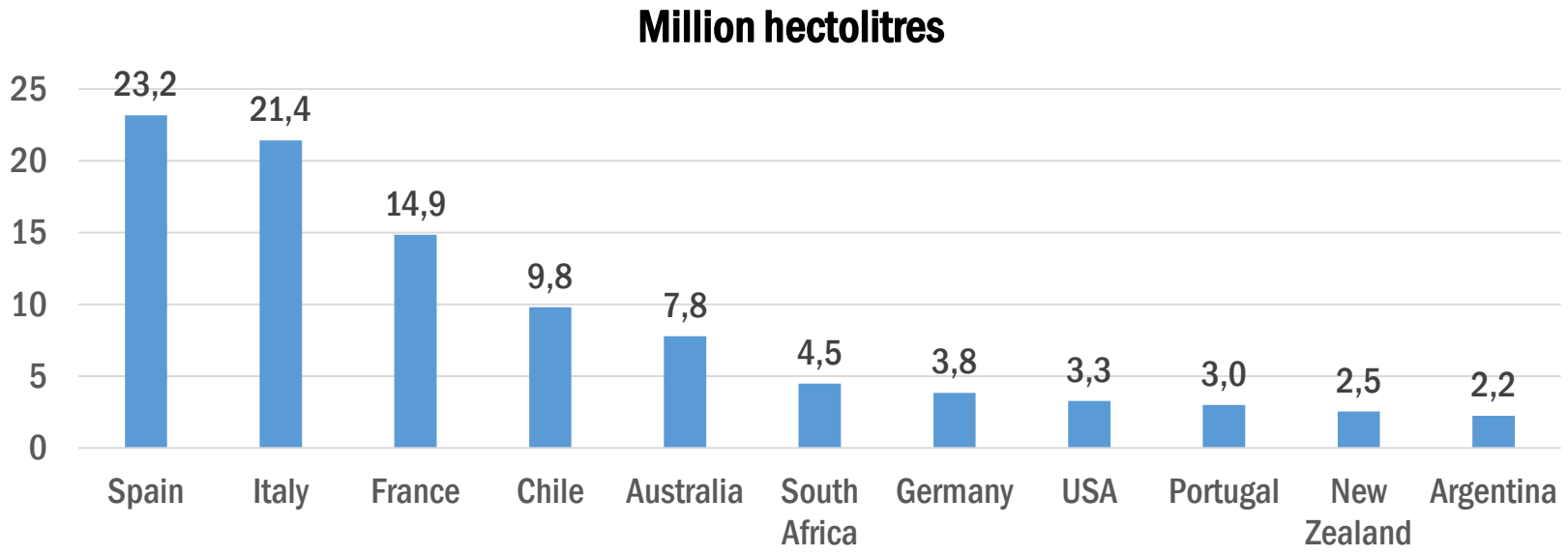


Tarde value by type of product in % 2017



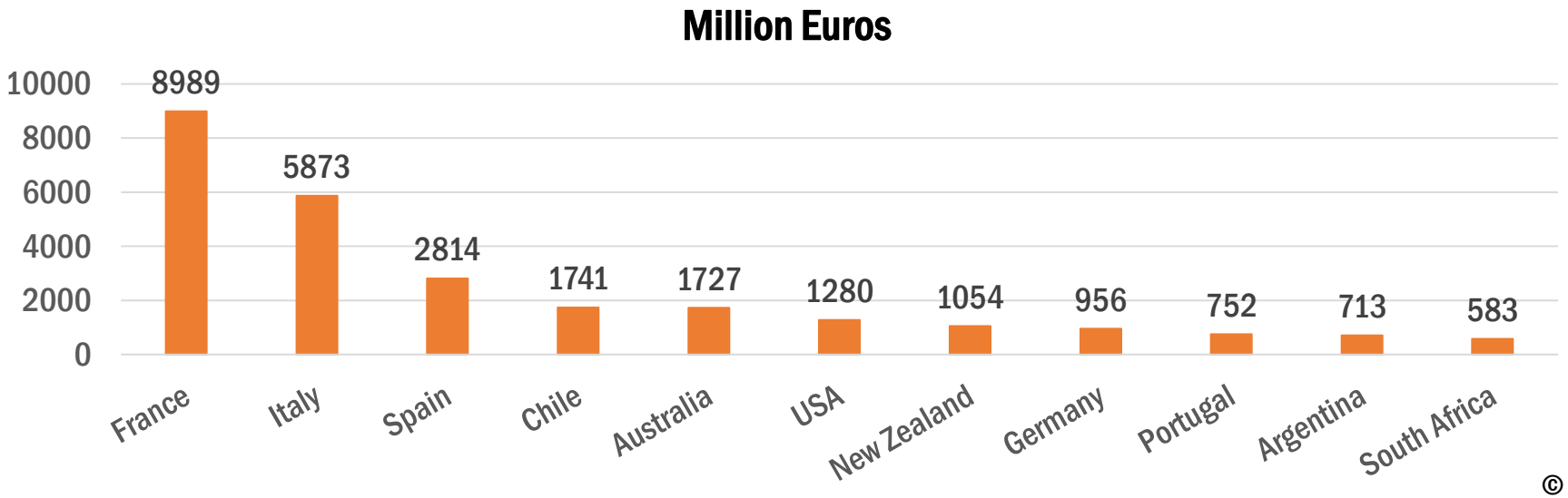
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Principal Exporters in 2017



Wine exports are dominated by **Spain, Italy** and **France** that, **combined,** represent **55%** of the world market by **volume**

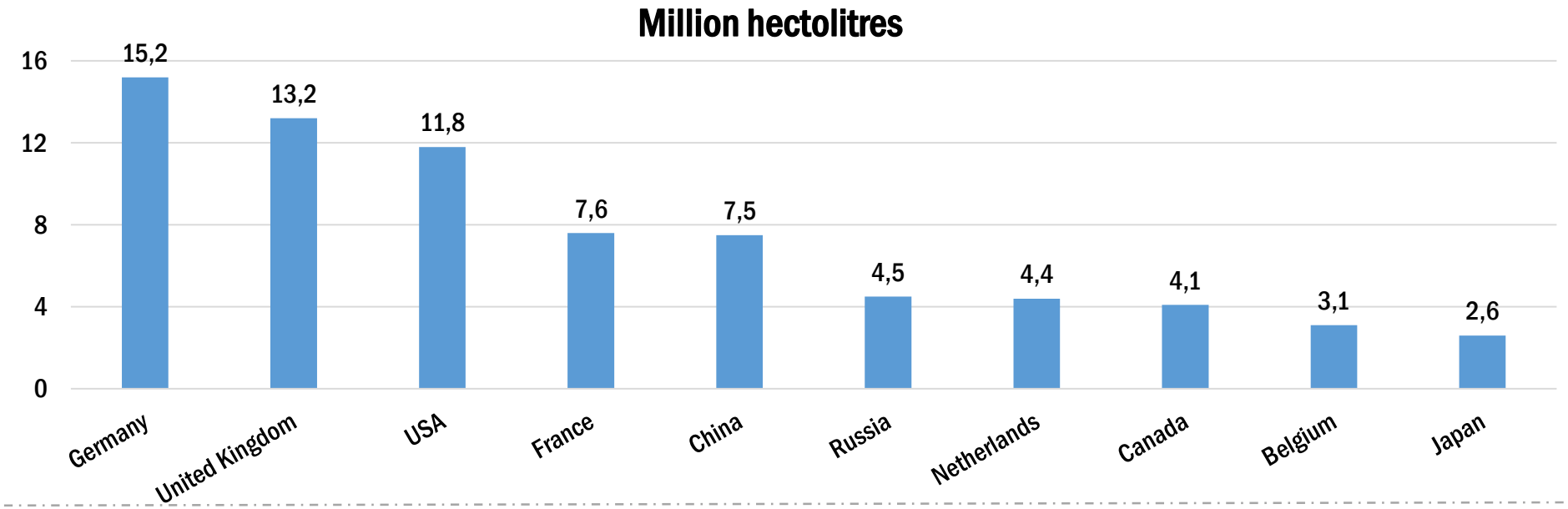
France and **Italy** continue to dominate the export market with **30%** and **19%** of the market **value** respectively



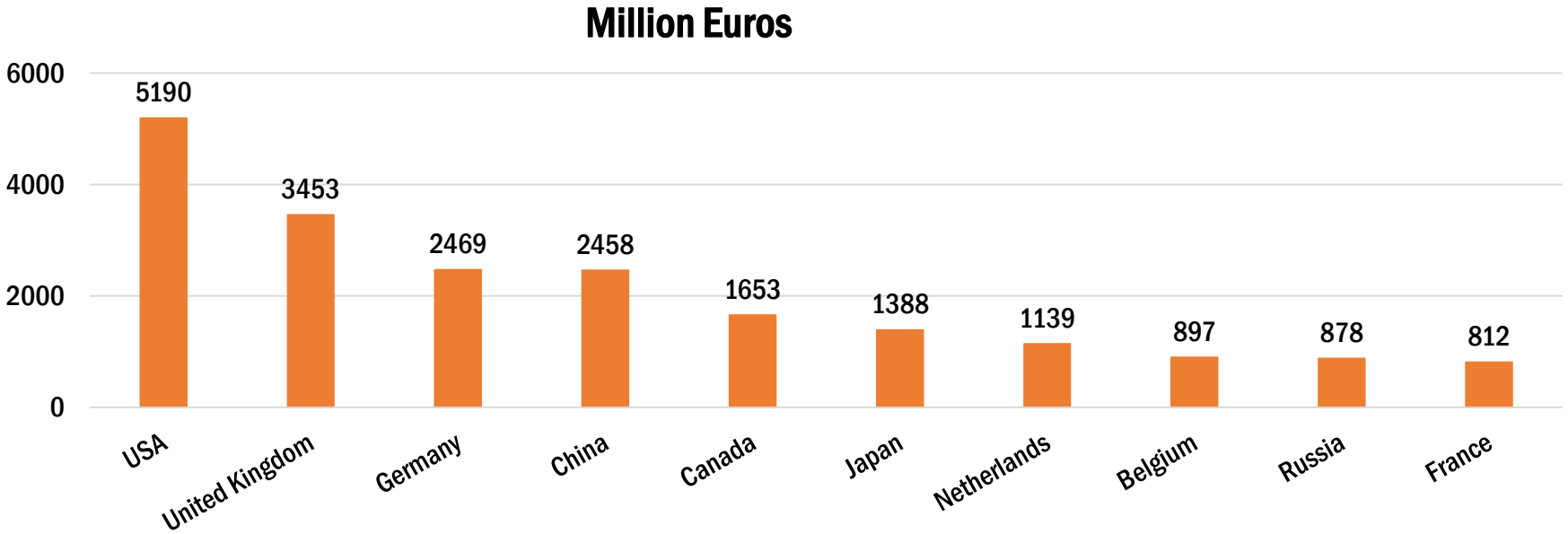
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Principal Importers in 2017

Germany, the **UK** and the **USA** imported 40.2 mhl of wine, about **40%** of the world imports value



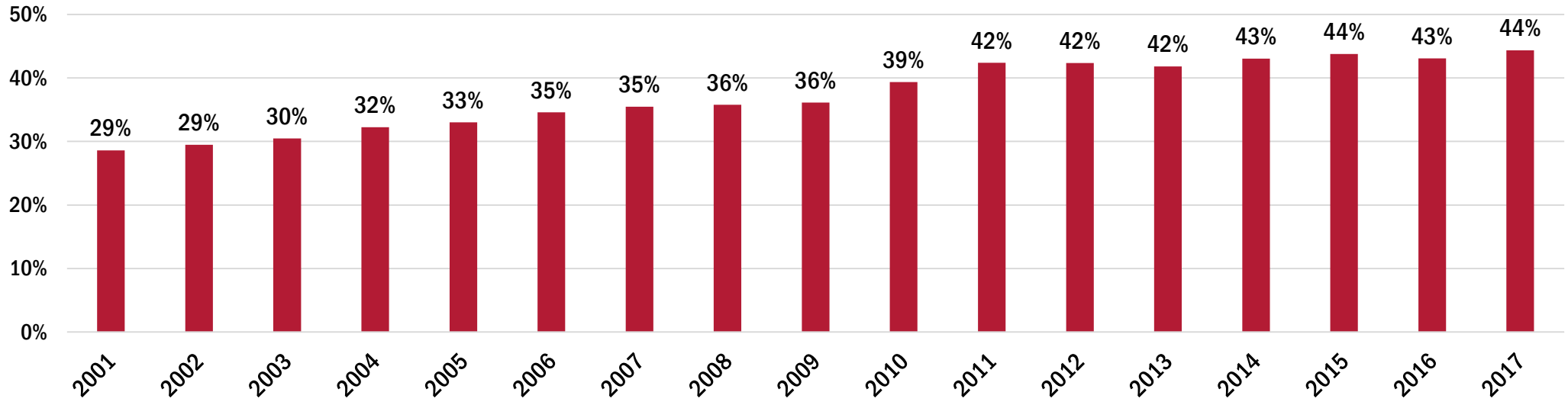
The **five principal importers** represent over **50%** of the global imports value



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Internationalisation of the wine market

Wine traded internationally / Global wine consumption



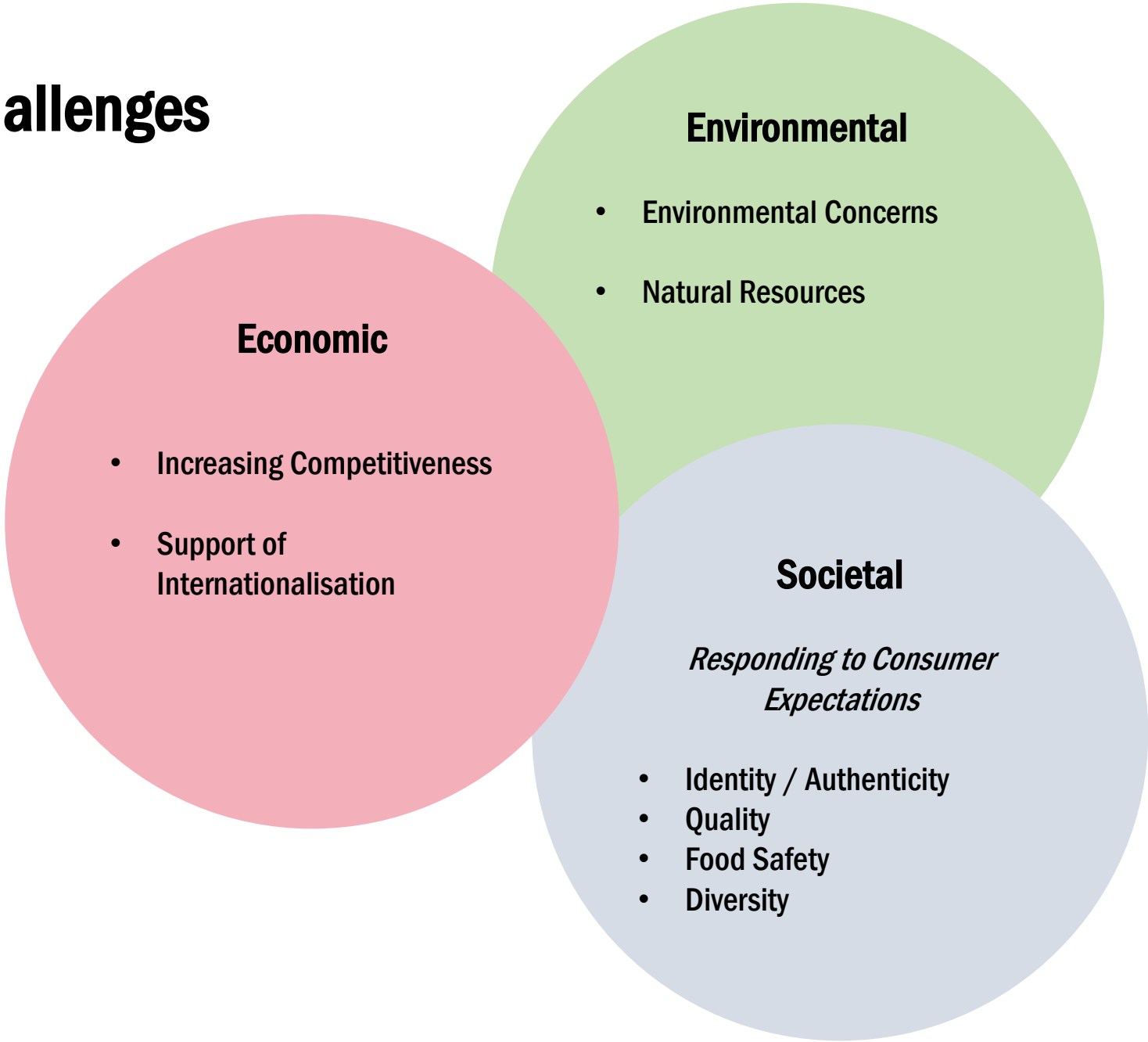
Towards an **increasingly internationalized sector:** in 2000 29% of the wine consumed was imported, in 2017 this share reached 44%

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Wine market: an increasingly globalized sector

1	More and more countries produce wine	• Supply grows, becoming more diversified • Competition increases
2	Wine consumption is getting more and more globalized	• Consumption patterns have changed: from a traditional model to a “modern model”
3	Consumers and citizens have new expectations and concerns	• Consumers and citizens are better informed, are getting more and more educated, and so they have new demands
4	Trade is, as well, getting more and more globalized	• In 2000 28% of the wine consumed was imported, nowadays this share reached 44%

Major Future Challenges



Thank you

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