

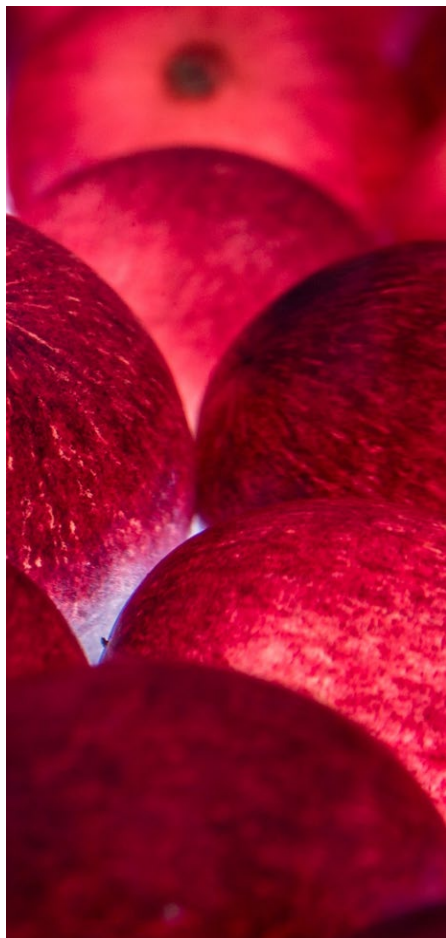


Geneva, 15th of July 2019

STATE OF THE VITIVINICULTURE WORLD MARKET

PAU ROCA Director General of the OIV





TOPICS

SURFACE AREA UNDER VINES

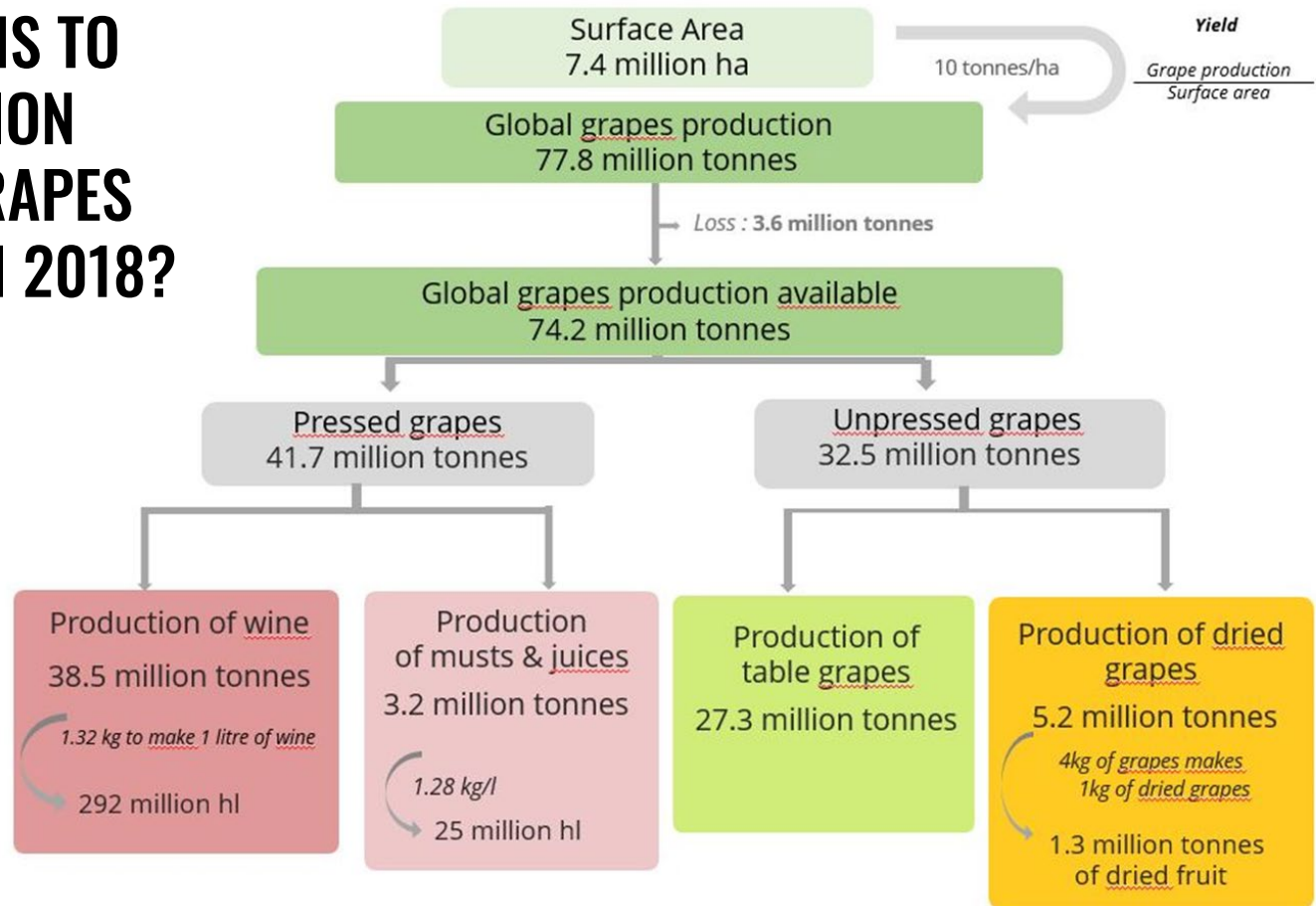
TOTAL FRESH GRAPES

TABLE GRAPES

DRIED GRAPES

WINE

WHAT HAPPENS TO THE 77.8 MILLION TONNES OF GRAPES HARVESTED IN 2018?



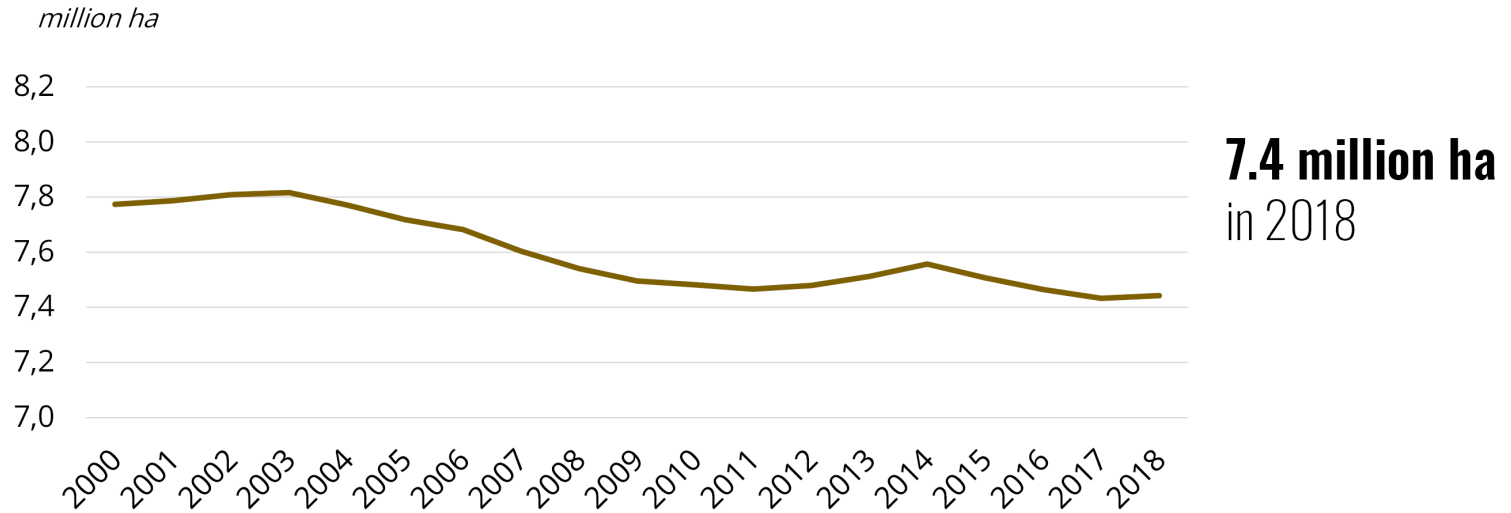


VINEYARD SURFACE AREA

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WORLD AREA UNDER VINES



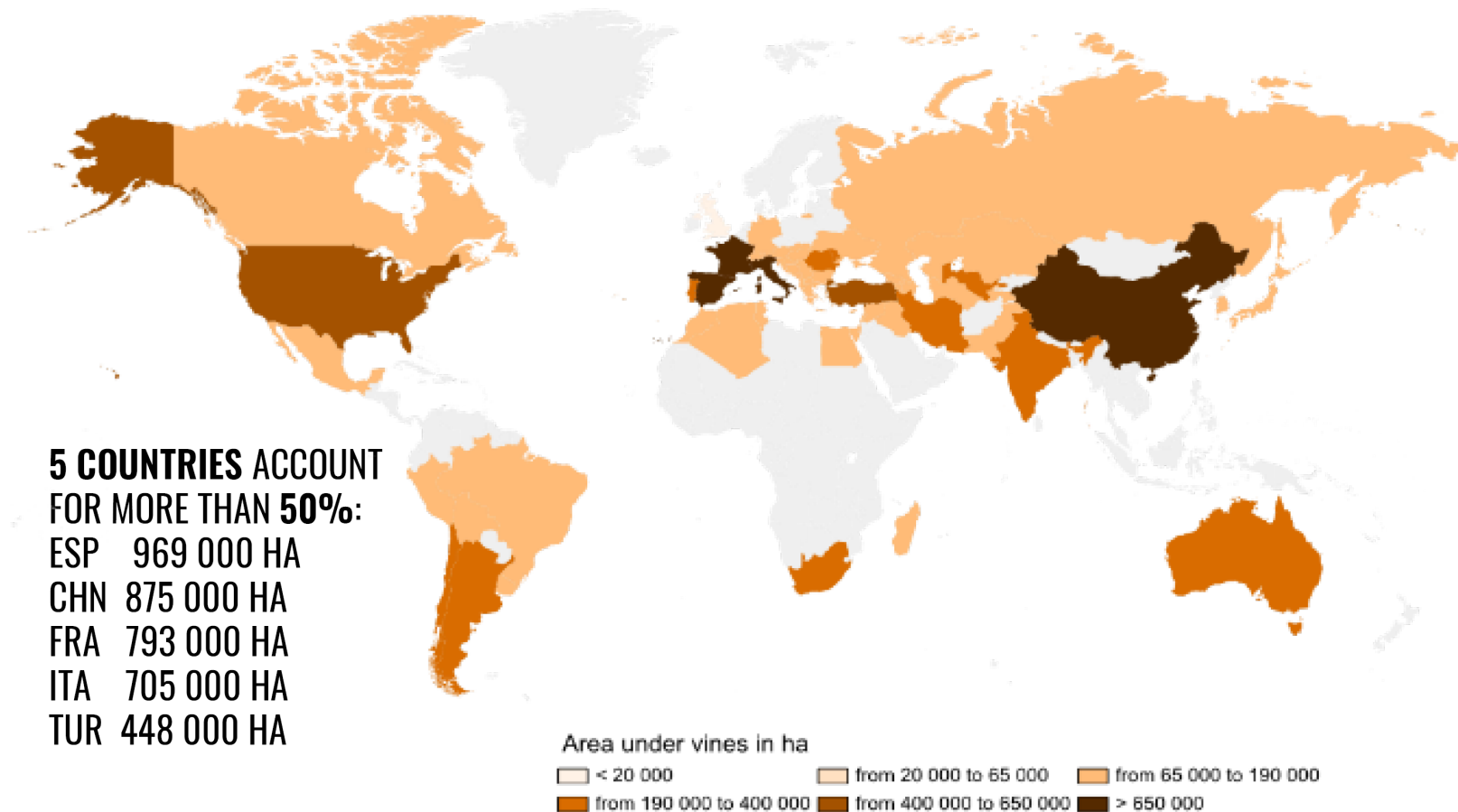
Decrease of the global area under vines since 2014, mainly driven by the decline of the vineyard area in Turkey, Iran and Portugal

In 2018 the world vineyard increases its surface of 24000 ha (+0,3% / 2017)

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



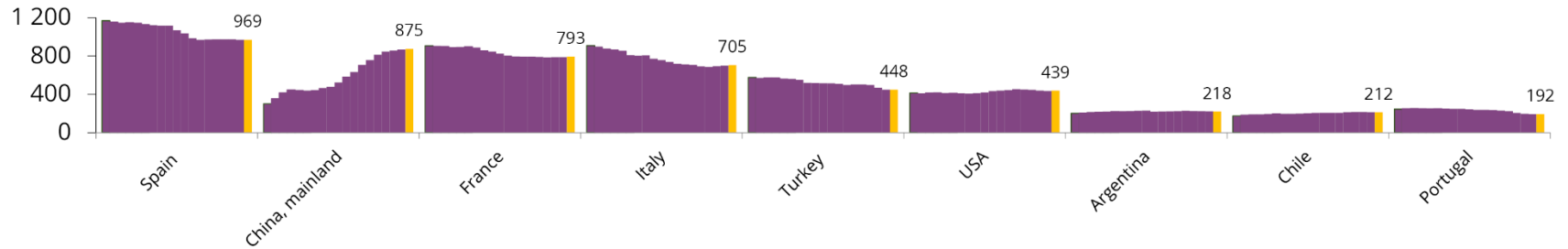
AREA UNDER VINES IN 2018



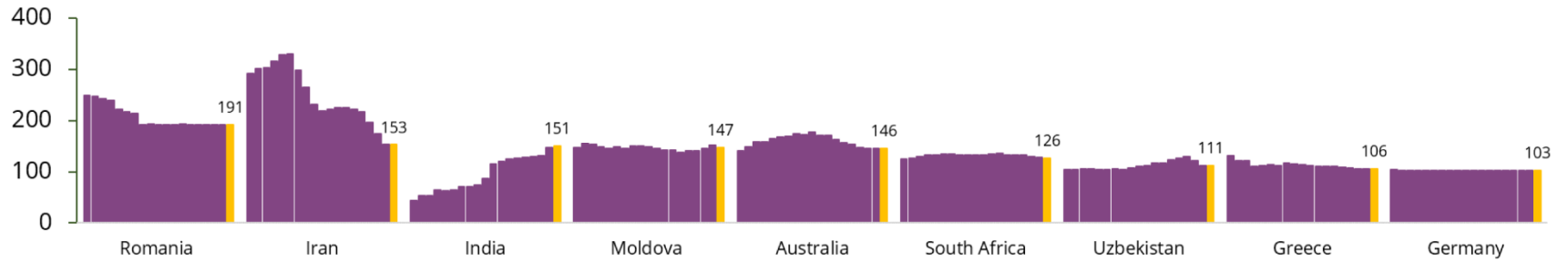


EVOLUTION AREA UNDER VINES: 2000-2018

thousand ha



thousand ha





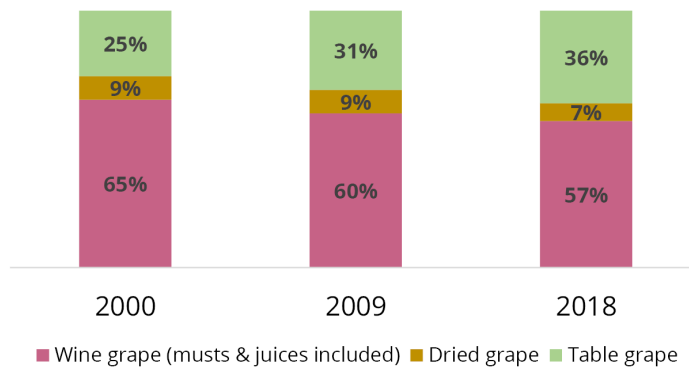
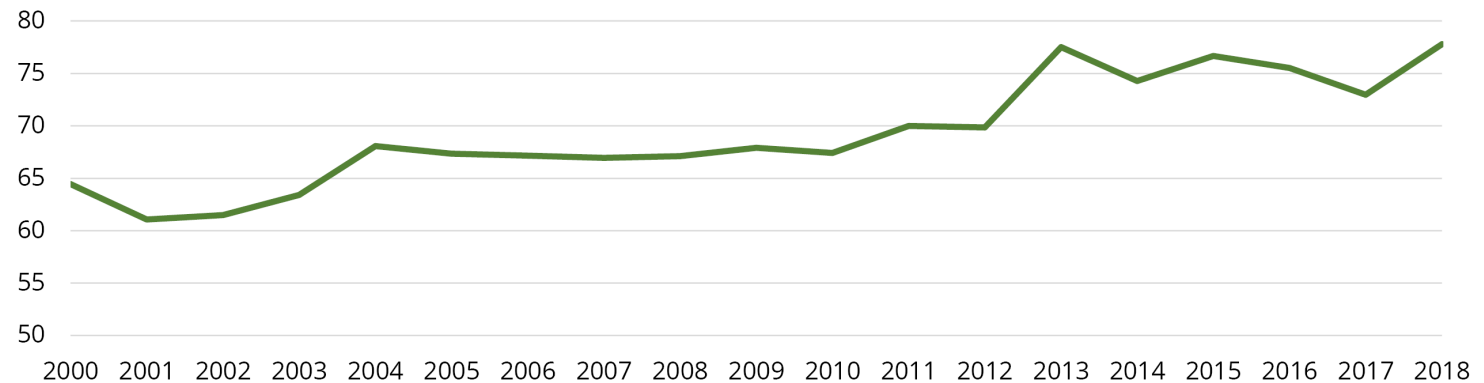
GRAPES PRODUCTION

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GLOBAL GRAPES PRODUCTION

77.8 million tonnes in 2018

million tonnes

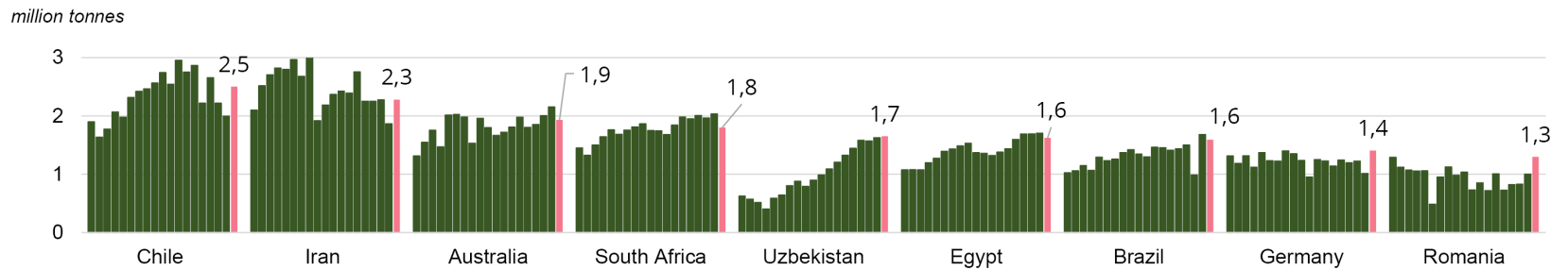
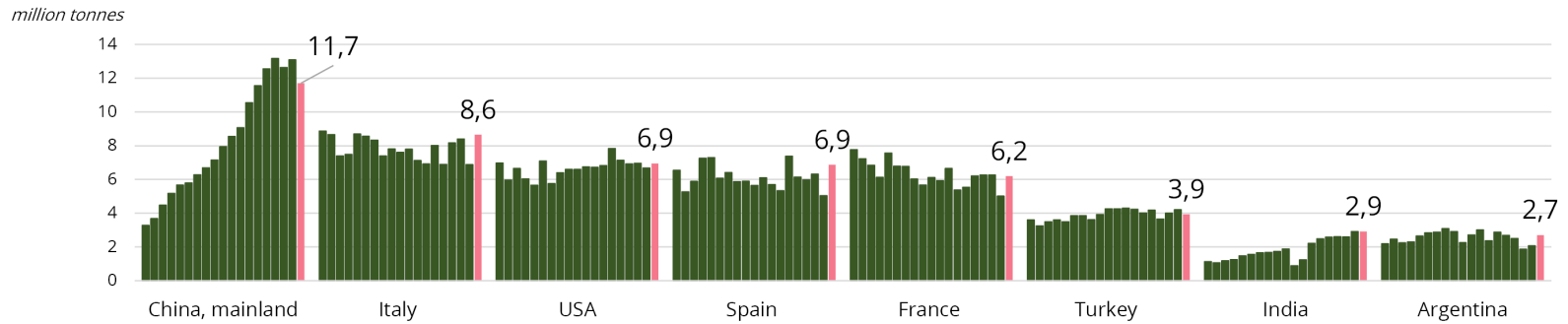


Share of total world grape production by type of product

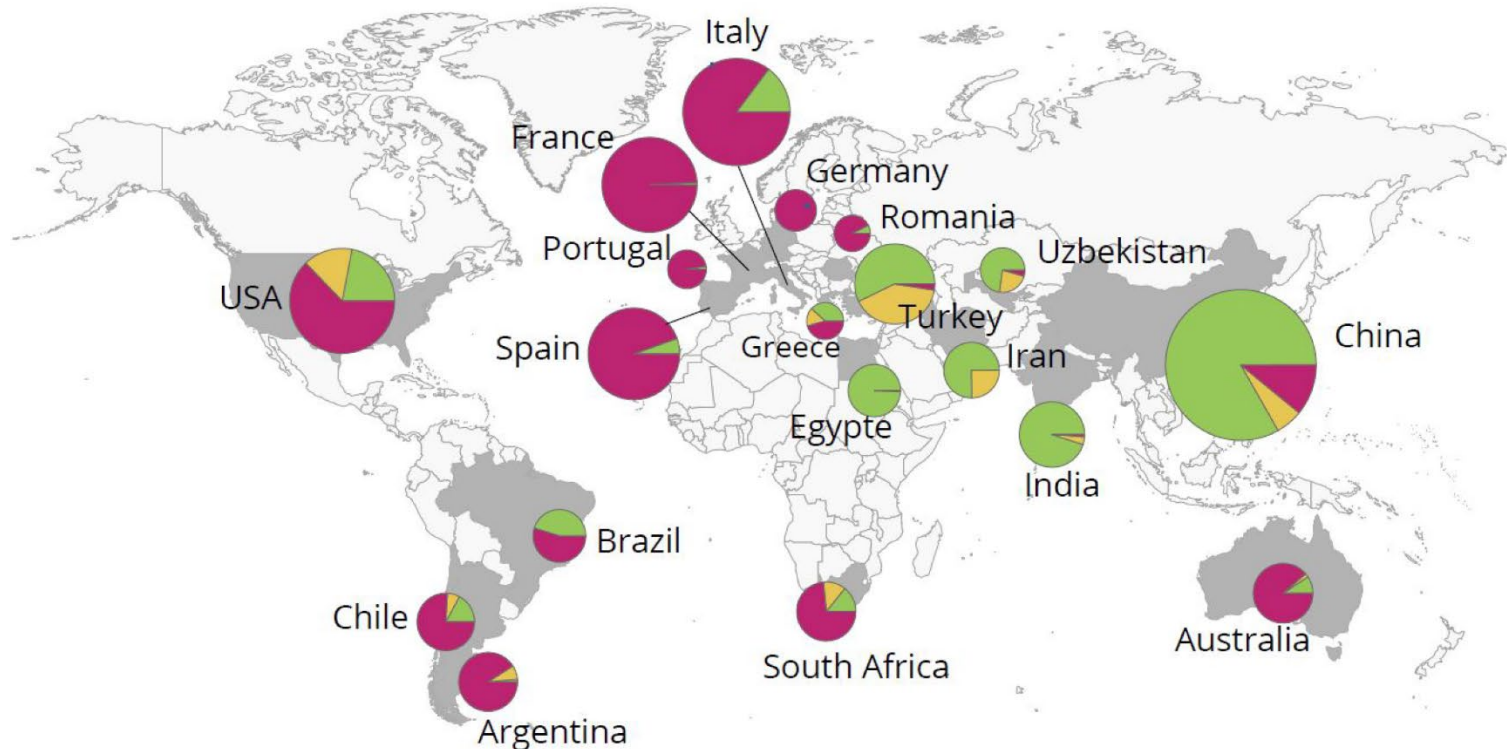
Since 2000 there is an increase of the unpressed grape share, driven mainly by the rise in table grape production

MAJOR GRAPES PRODUCERS (ALL USES)

TREND 2000-2018



MAJOR GRAPE PRODUCERS IN 2018



Type of grape

- Wine grape*
- Dried grape
- Table grape

* included musts & juices



TABLE GRAPES

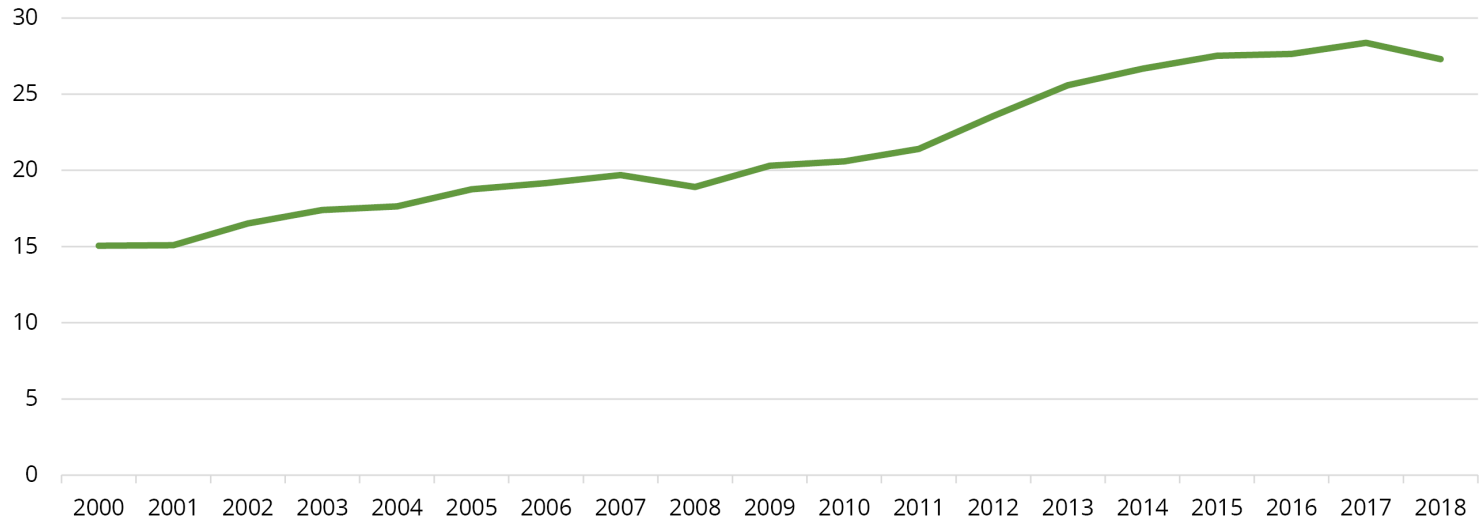
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WORLD TABLE GRAPES PRODUCTION

million tonnes

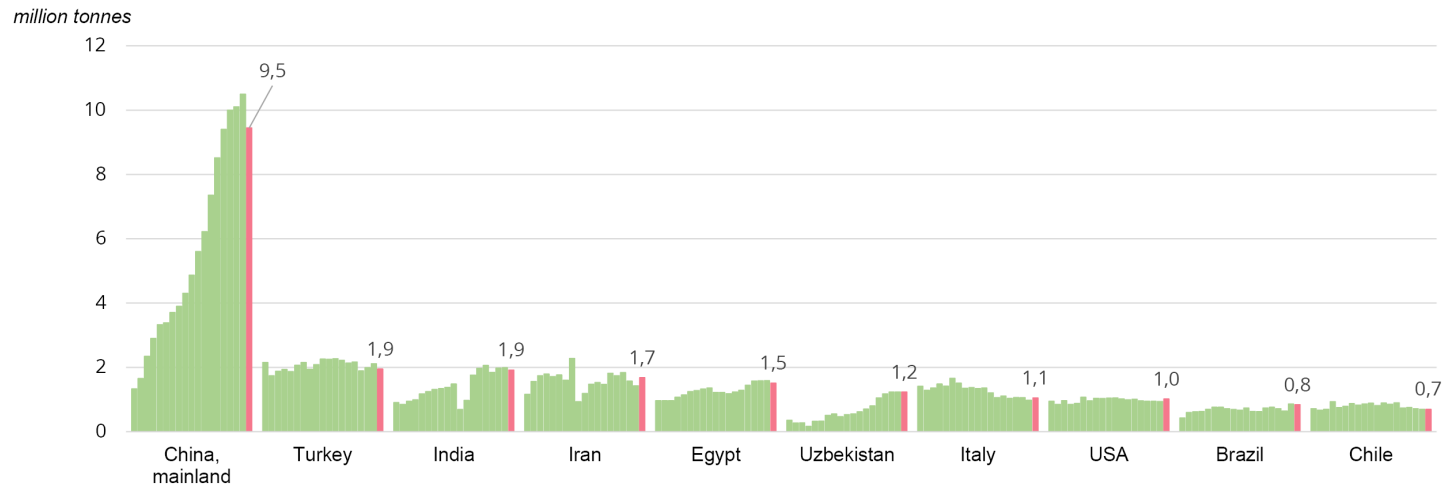
27.3 million tonnes in 2018



With an average annual growth rate of +5%, global production of table grapes has doubled in 20 years

MAJOR TABLE GRAPES PRODUCERS

TREND 2000-2018



China is a major contributor to the world production of table grapes (35% of the world total in 2018)

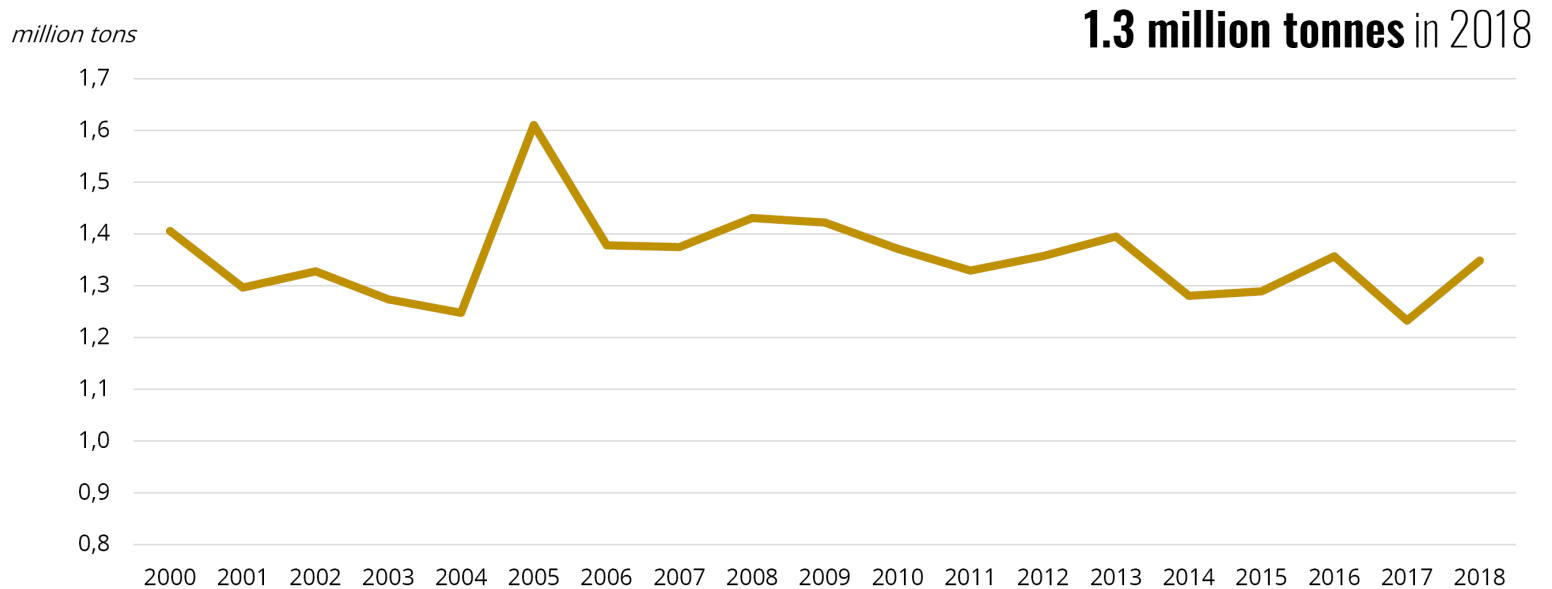
Between 2000 and 2018, table grapes production in China has multiplied by 7



DRIED GRAPES

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EVOLUTION OF WORLD DRIED GRAPES PRODUCTION



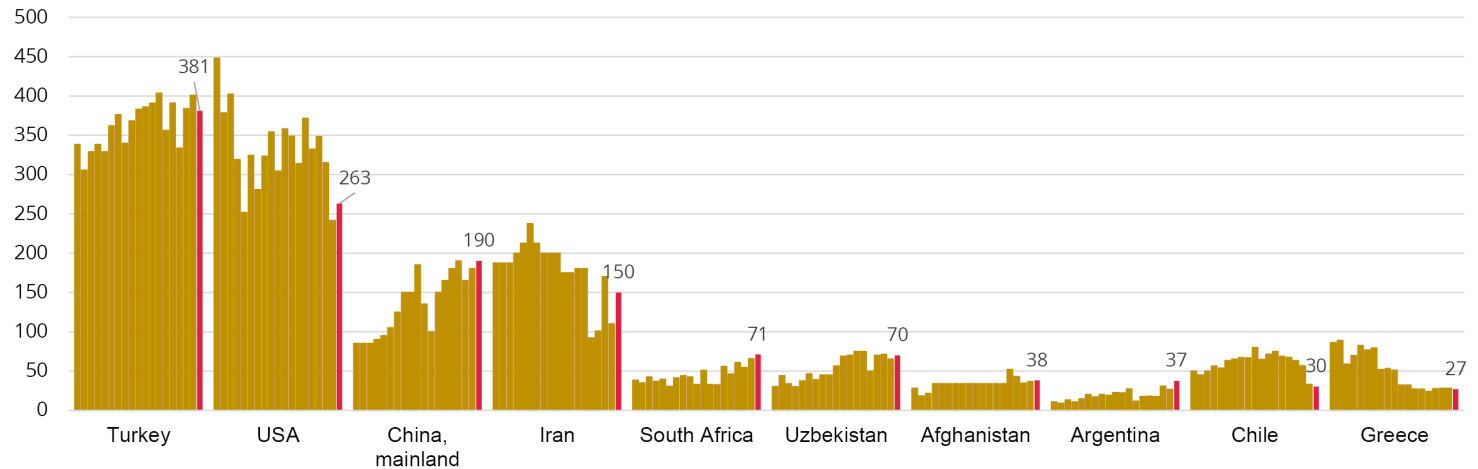
2018 world dried grapes production (+9%/2017) is in line with its 10 years average

Asia and America continue to dominate the world production with a share of 92%

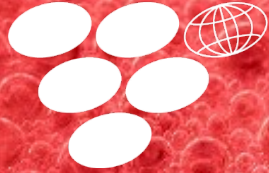
MAJOR DRIED GRAPES PRODUCERS

TREND 2000-2018

thousand tonnes



In 2018 top 4 producers account for 73% of world production:
Turkey (28%), USA (20%), China (14%) and Iran (11%)

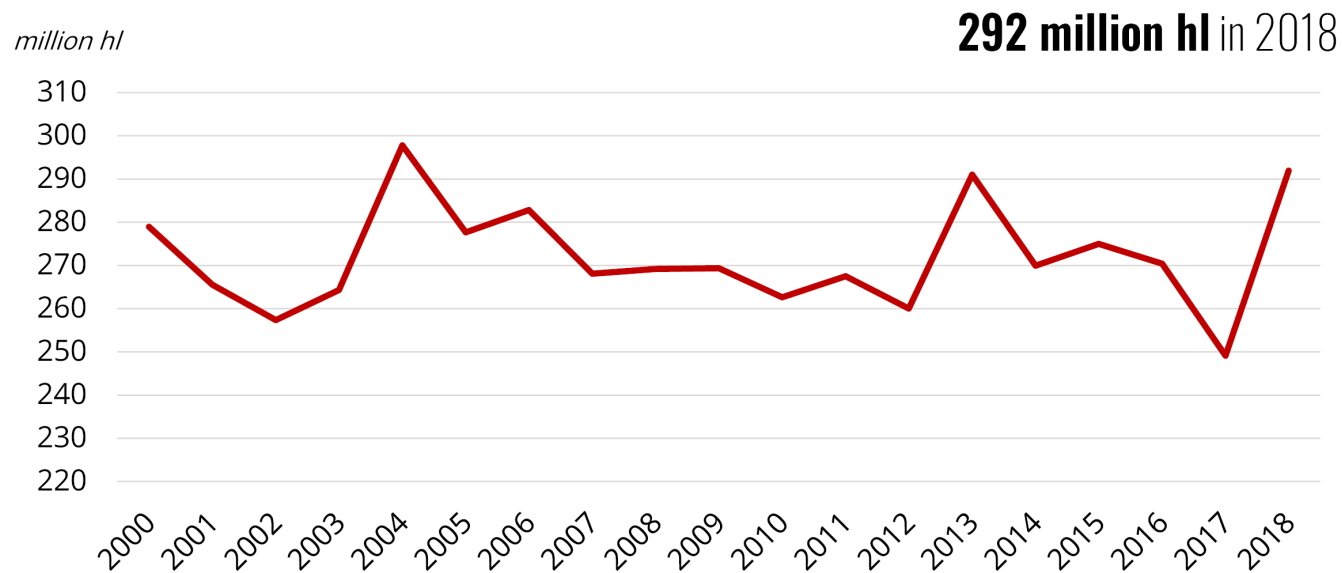


WINE PRODUCTION

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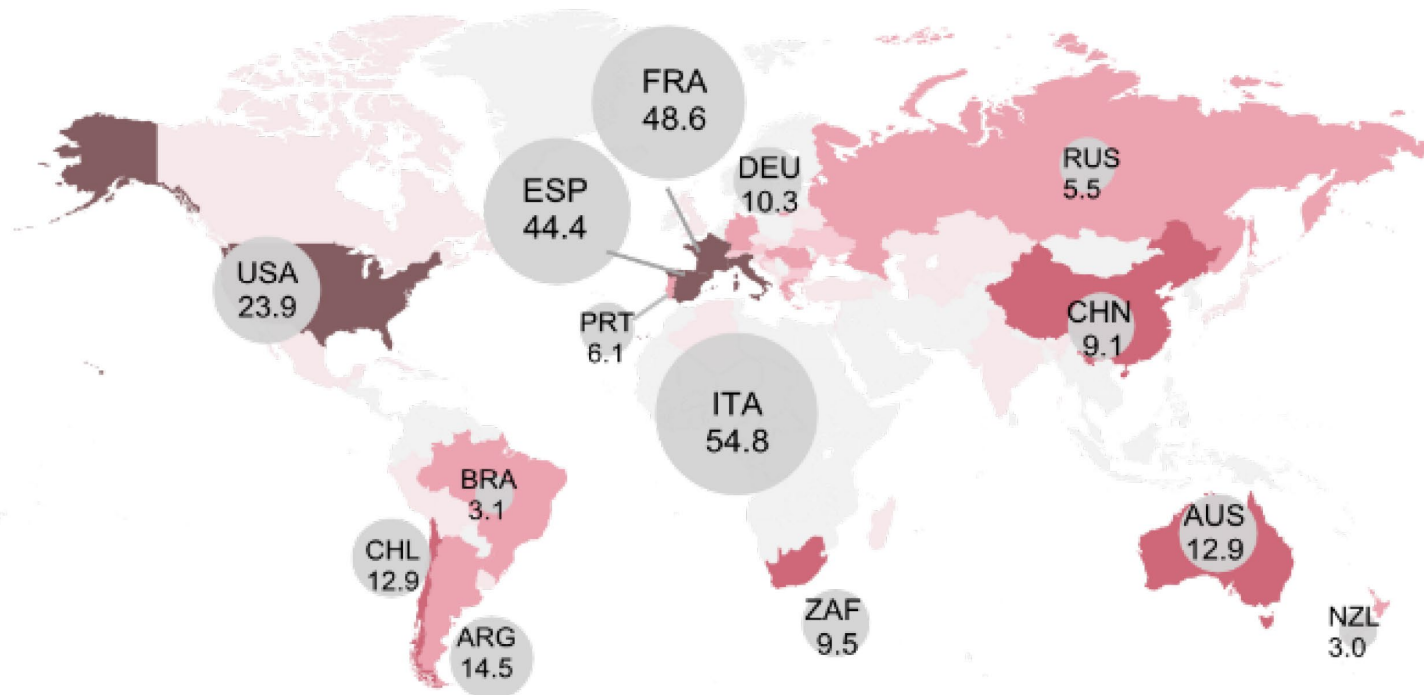
WORLD PRODUCTION OF WINE

(JUICES & MUSTS EXCLUDED)

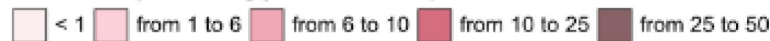


With a 17% increase compared to 2017 (+43 million hl), wine production in 2018 is the 2nd highest since 2000

WORLD PRODUCTION IN 2018

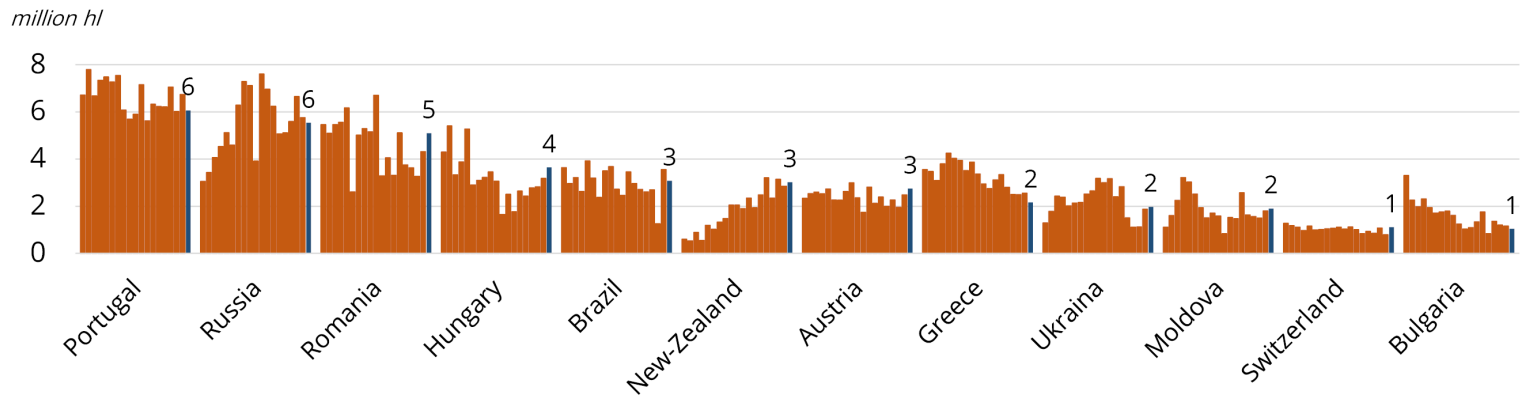
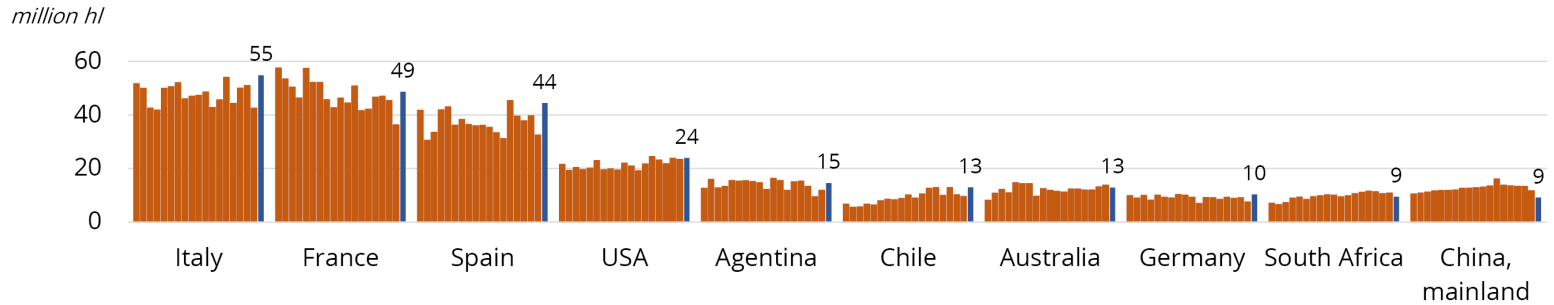


Wine production mhl
(excluding juice & musts)



MAJOR WINE PRODUCERS

TREND 2000-2018

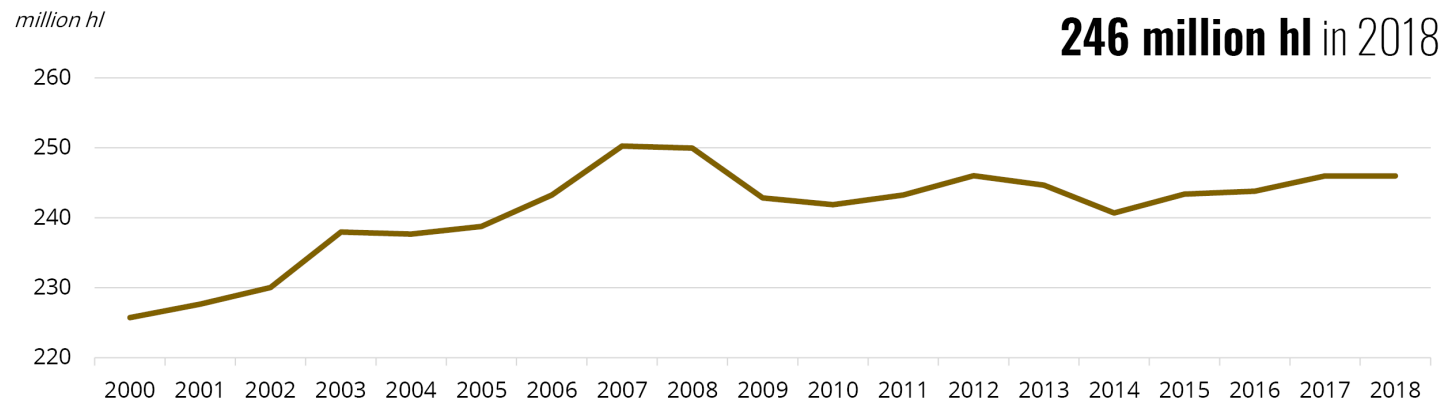




WINE CONSUMPTION

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GLOBAL WINE CONSUMPTION

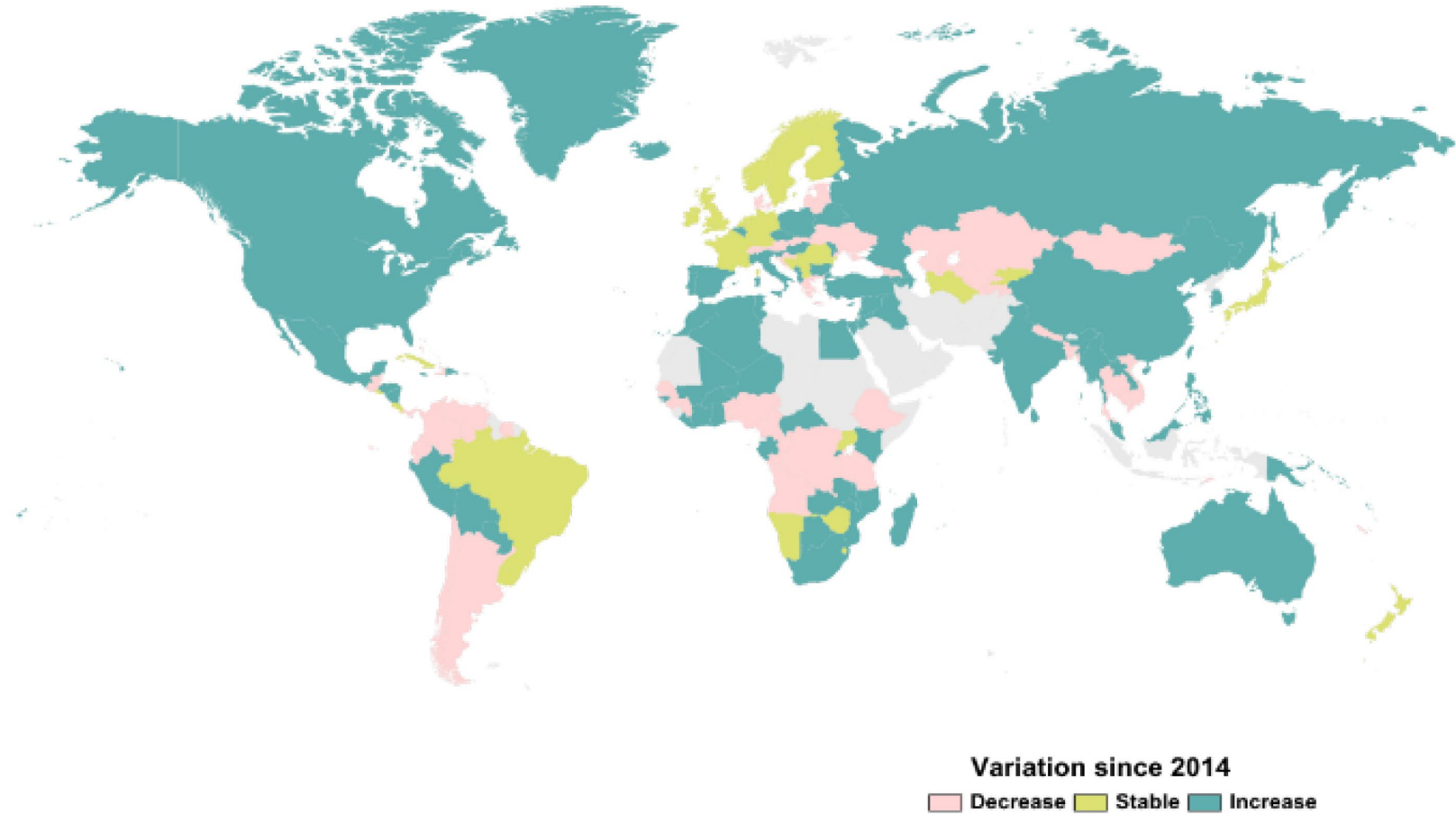


After the 2008 economic crisis, global wine consumption has been fluctuating between 241-246 mhl

Since 2014 we observe a steady growth in consumption which seems to stabilize in 2018



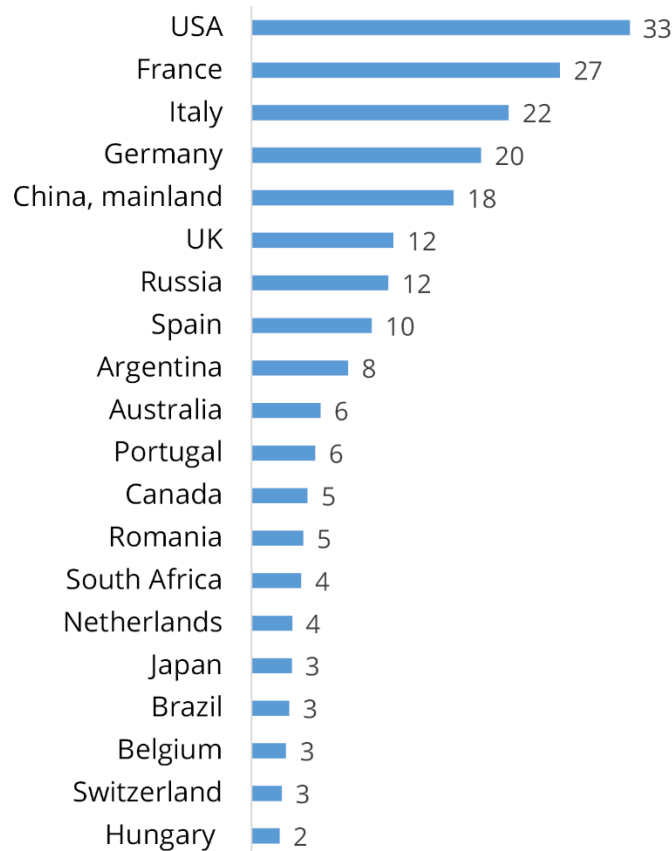
WHO IS DRIVING THE GROWTH IN CONSUMPTION?



WINE CONSUMPTION

Total consumption 2018

million hl

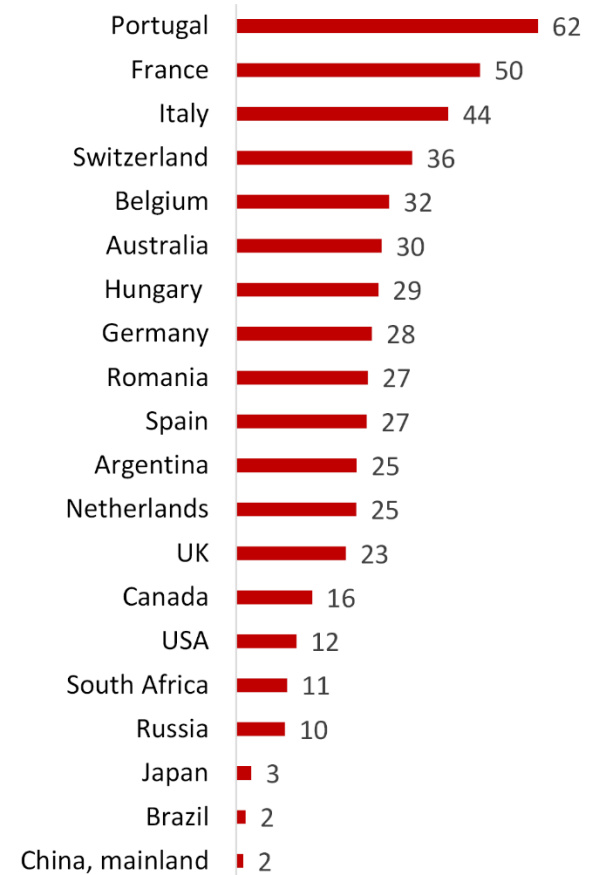


Breakdown of these countries by consumption per capita



Per capita (+15) consumption 2018

litres per capita





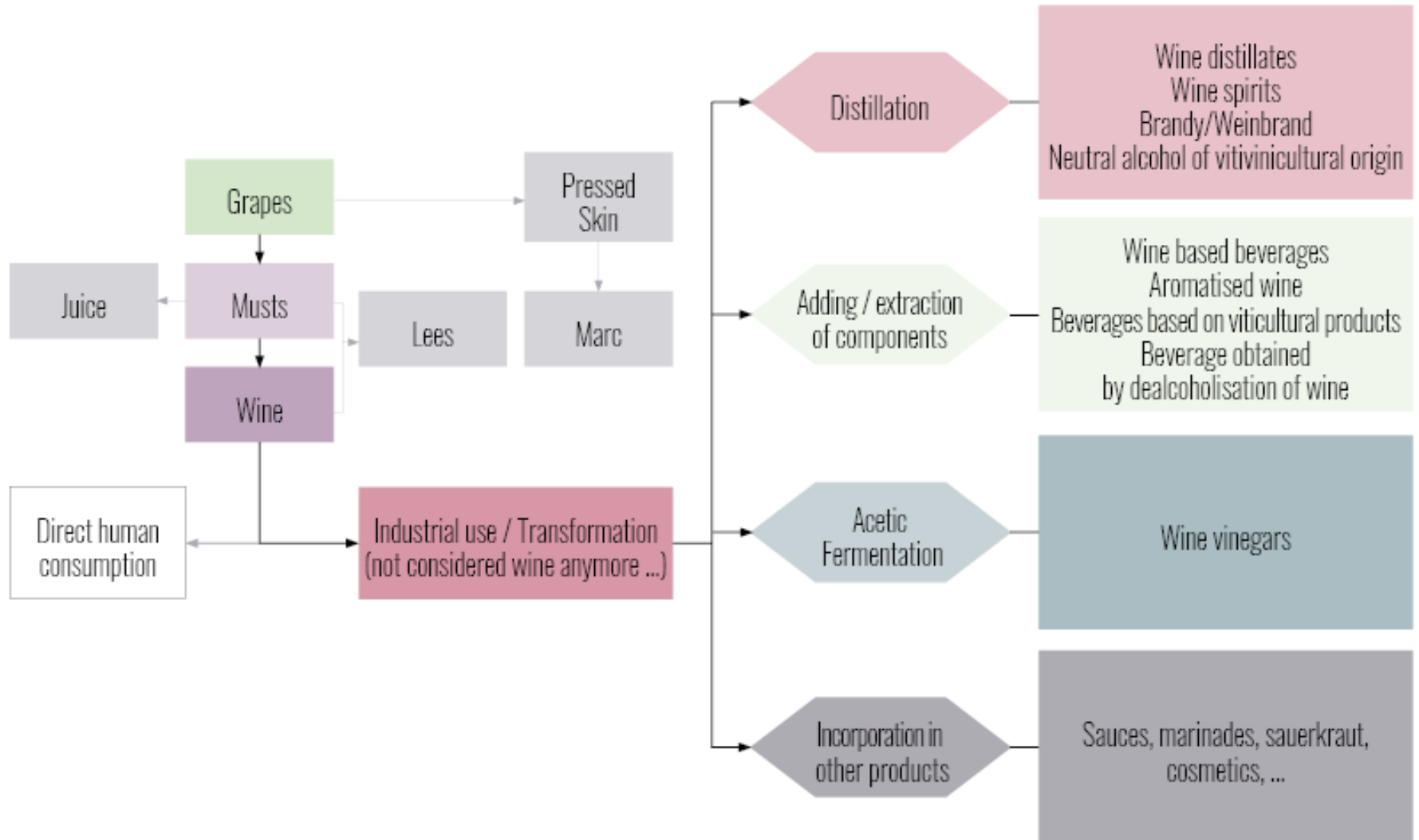
OIV FOCUS

INDUSTRIAL USE OF WINE

OIV

OIV FOCUS

INDUSTRIAL USE OF WINE





INDUSTRIAL USES OF WINE

million hl

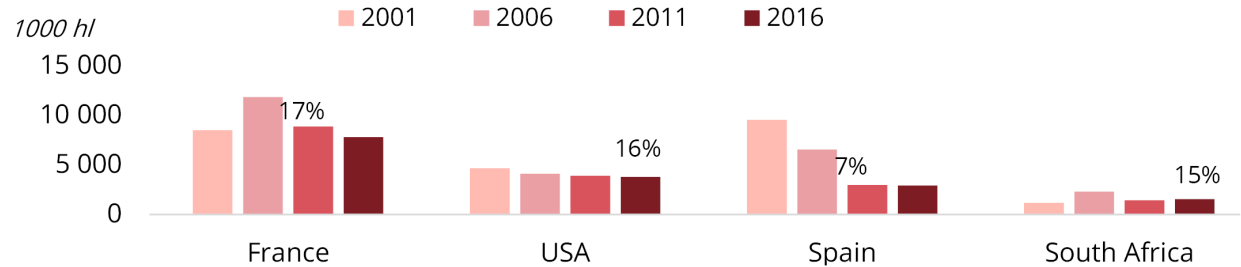


In 2016, 13% of world wine production (almost 34 mhl) was used for industrial purposes

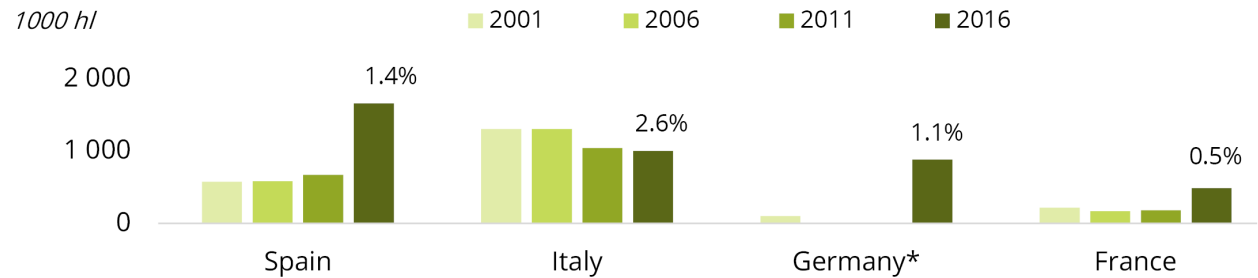


WINE INPUT FOR:

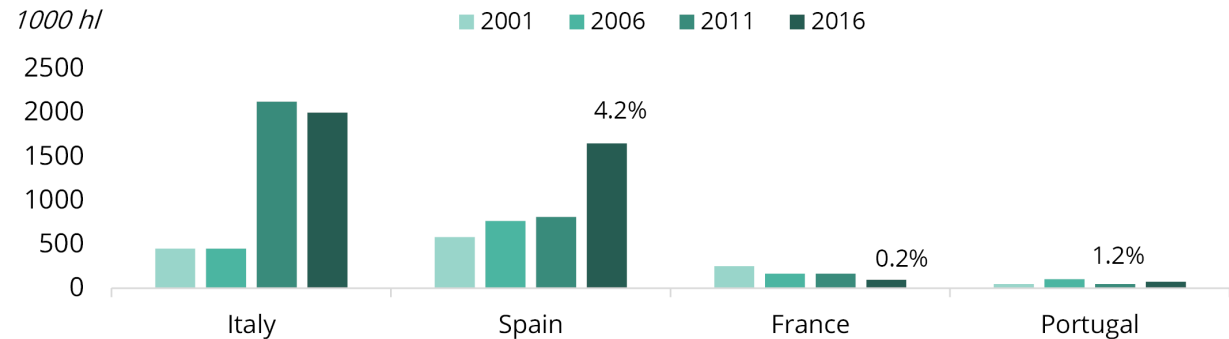
Wine spirits & brandies



Wine based beverages & aromatised wine



Wine vinegars





INTERNATIONAL TRADE OF WINE

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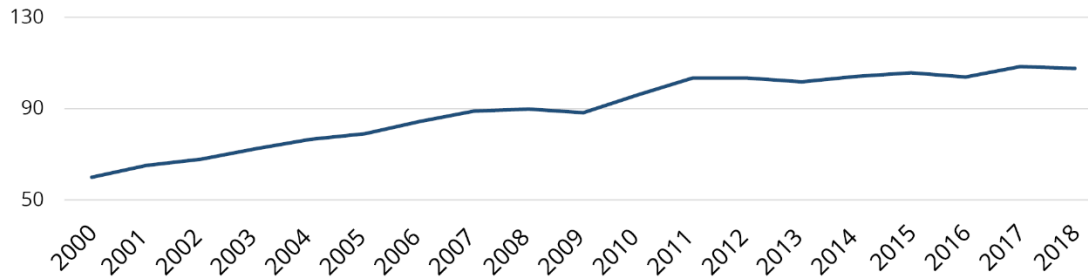


GLOBAL WINE TRADE

million hl

Volume

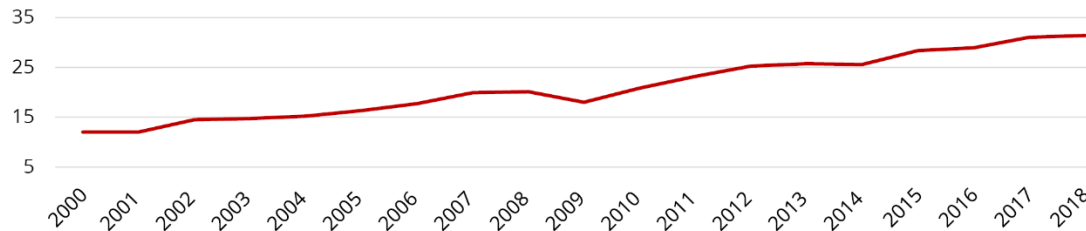
108 million hl in 2018
-0.7% /2017



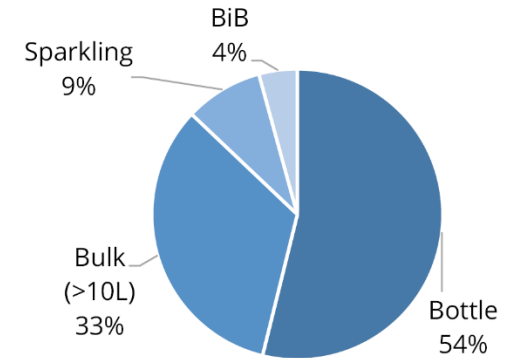
bn EUR

Value

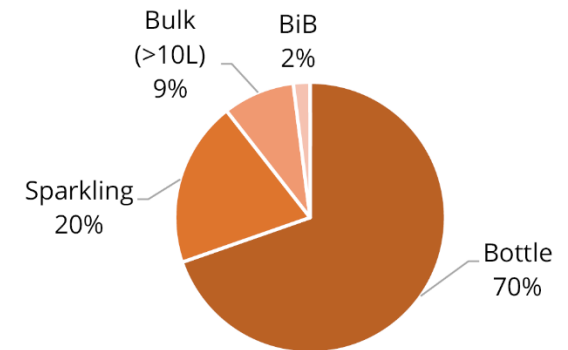
31 billion € in 2018
+1.2% /2017



Volume, by type of product in % 2018



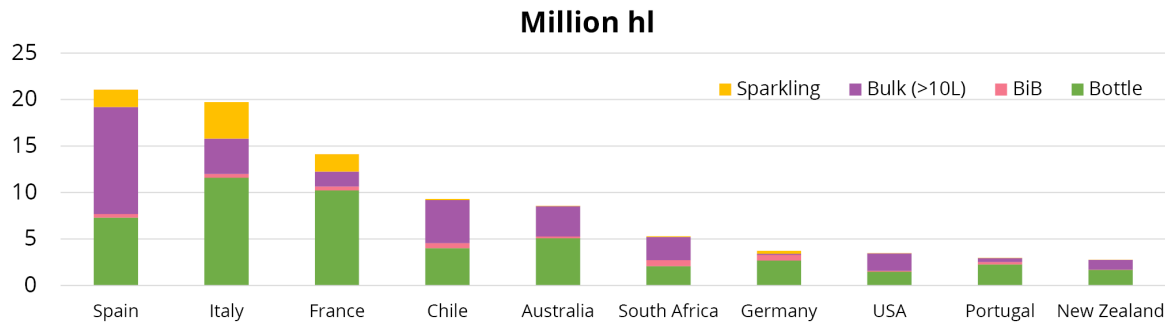
Value, by type of product in % 2018



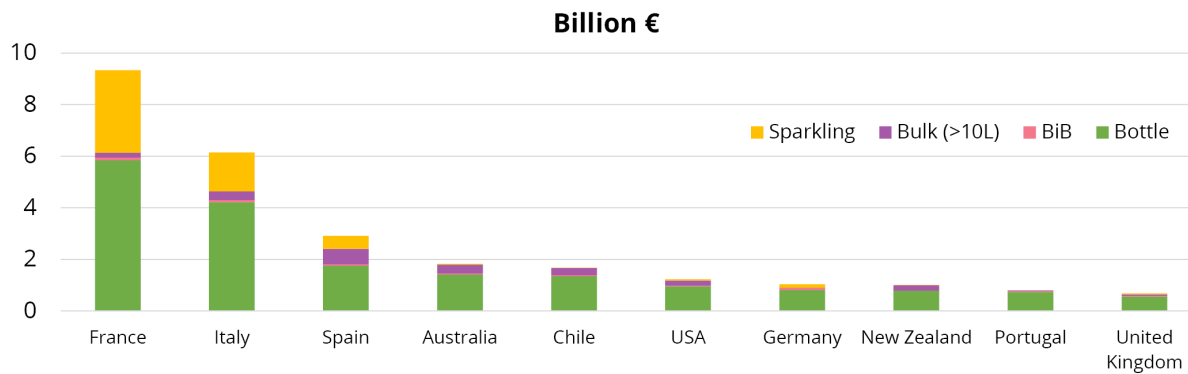
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MAIN WINE EXPORTERS IN 2018



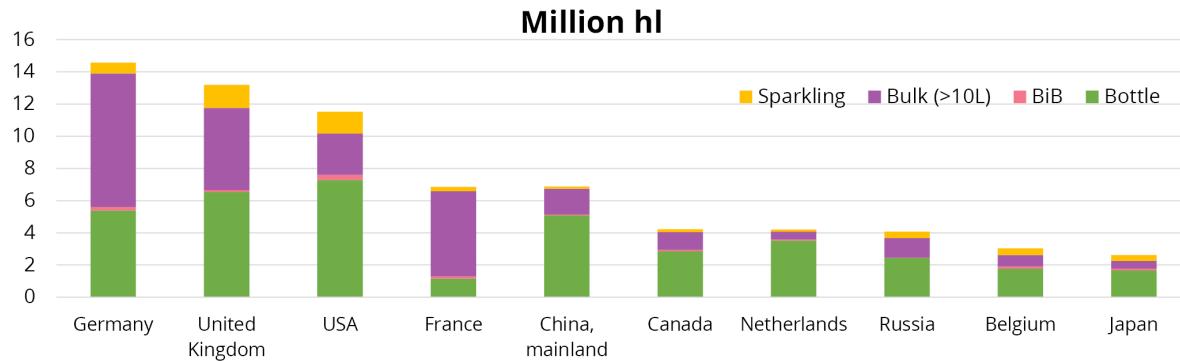
Wine exports are dominated by Spain, Italy and France that combined represent about 50% of the world market by volume



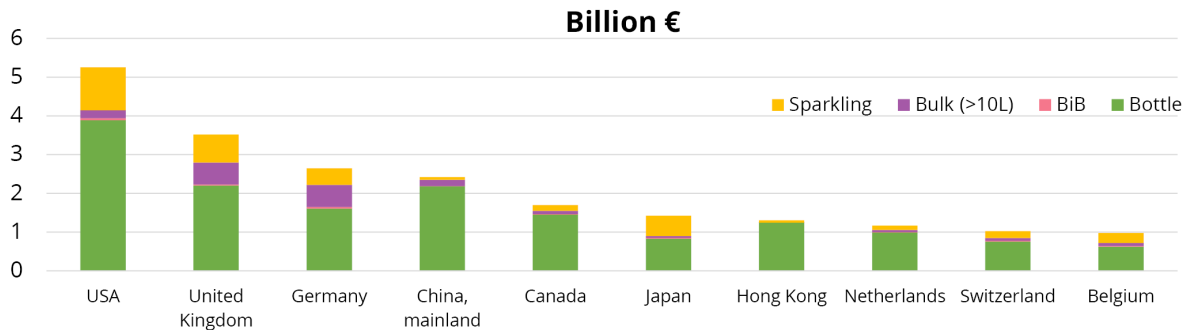
France and Italy represent 30% and 20% respectively of the global wine exports value



MAIN WINE IMPORTERS IN 2018



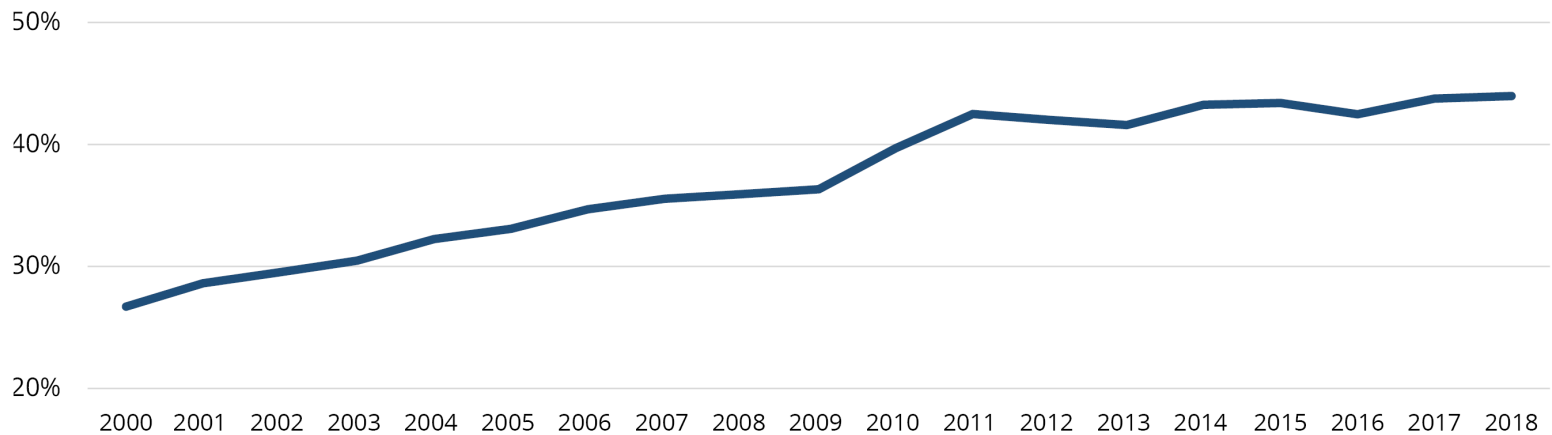
Germany, the UK and the USA represent 37% of the world imports volume



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



WINE TRADED INTERNATIONALLY / GLOBAL WINE CONSUMPTION



Towards an increasingly internationalized sector: in 2000 27% of the wine consumed was imported, in 2018 this share reached 44%



THANK YOU FOR YOUR ATTENTION

WISHING YOU A GREAT CONGRESS!

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