



INTERNATIONAL ORGANISATION OF VINE AND WINE

# STATE OF THE VINE AND WINE SECTOR

OIV Press Conference

John Barker, OIV Director General  
25 April 2024

*OIV*



## **2023 DATA**

**Vineyard Surface Area**

**Wine Production**

**Wine Consumption**

**International Trade in Wine**

## **2024 First Estimates**

**Wine Production in Southern Hemisphere**

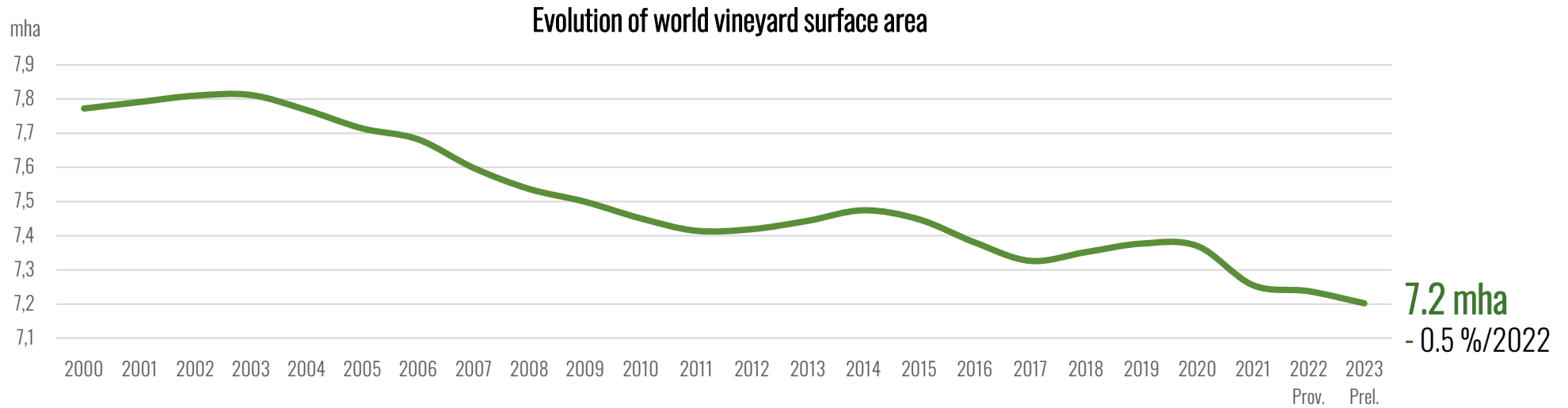
**Challenges & Opportunities:  
Looking Ahead**





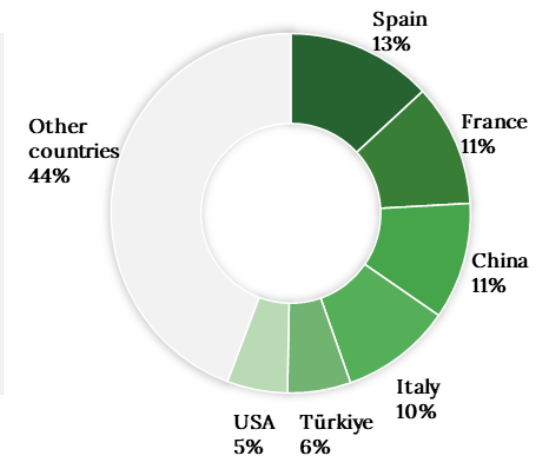
# Vineyard Surface Area

# Vineyard Surface Area



The **world's vineyard surface area continued its decline, shrinking by 0.5% from 2022 to 7.2 million hectares**. This trend, observed for the **third consecutive year**, was driven by the removal of vineyards in major vine-growing regions (including all types of grapes) across both hemispheres.

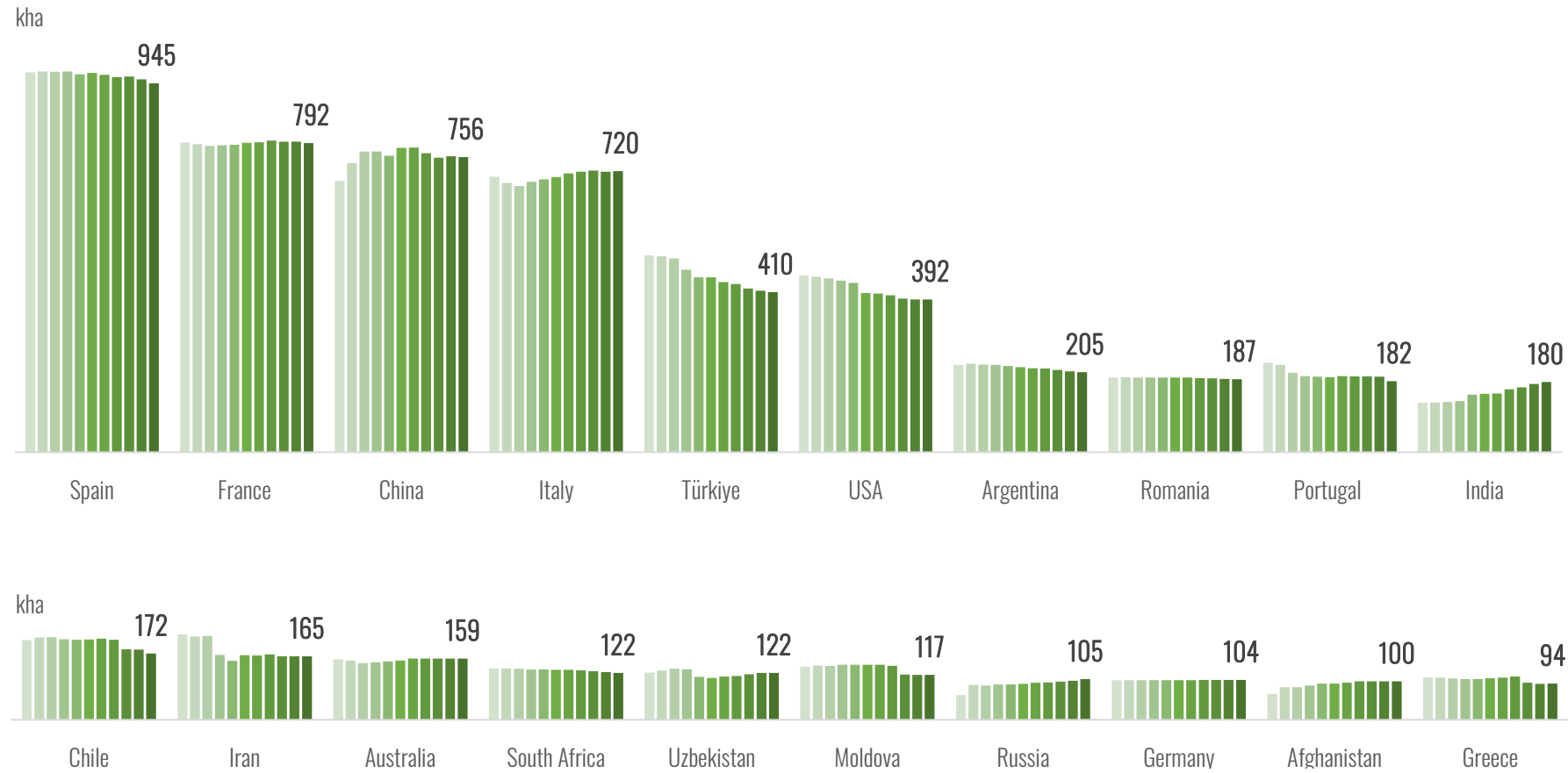
In 2023, the **top 6 countries represent 56% of the world total**, while the **EU and the Southern Hemisphere account for 45% and 12%, respectively**.





# Vineyard Surface Area

Major countries by vineyard surface area, 2014-2023







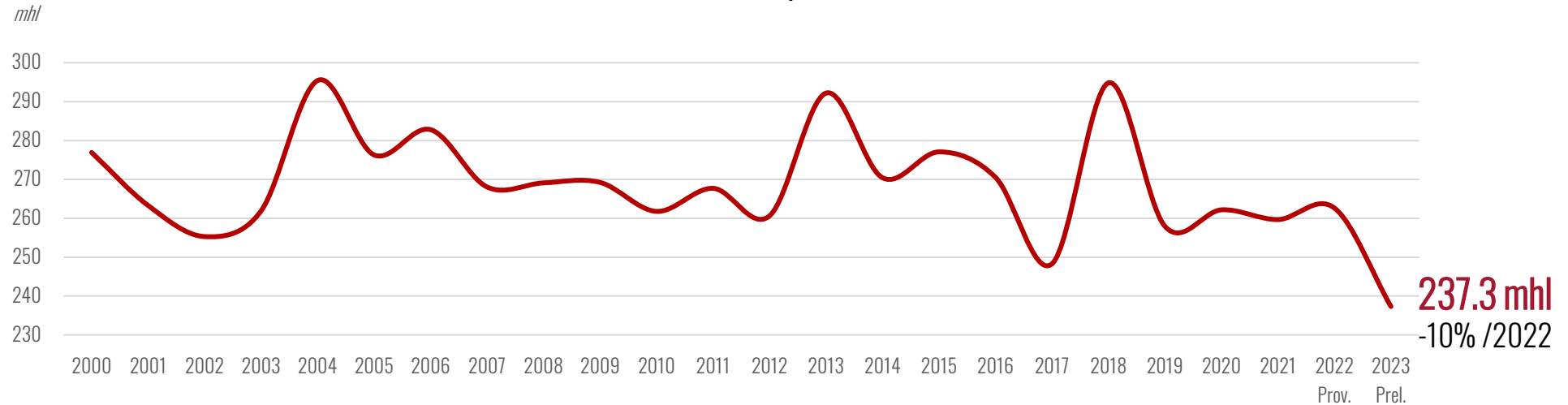
# Wine Production





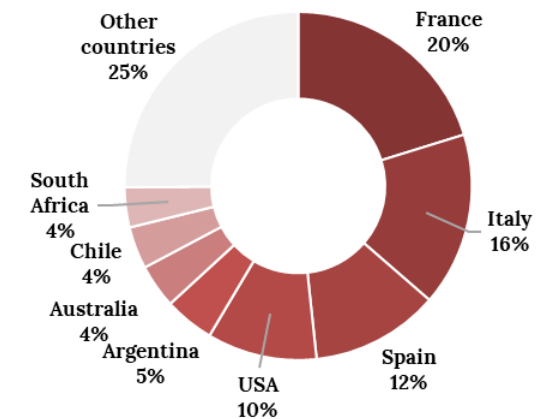
# Wine Production

Evolution of world wine production



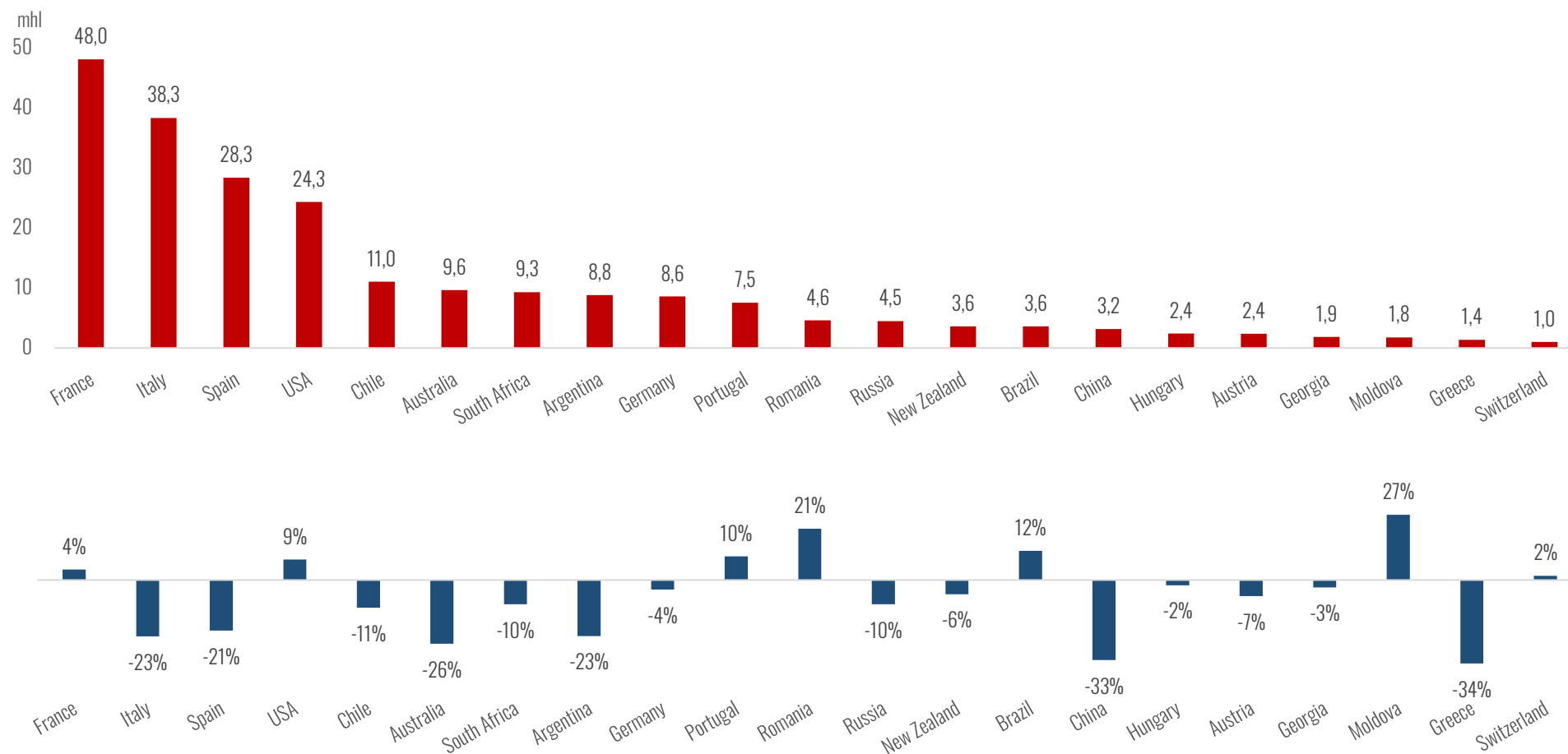
Extreme climatic conditions and widespread fungal diseases severely impacted many vineyards worldwide, culminating in a **historically low global wine production of 237 million hectolitres**. This marked a **10% drop from 2022** and represented the **lowest output since 1961**.

Very low production volumes were recorded in both the **EU (145 mhl, -11%/2022)** and the **Southern Hemisphere (47 mhl, -15%/2022)**.



# Wine Production

Major wine producing countries in 2023

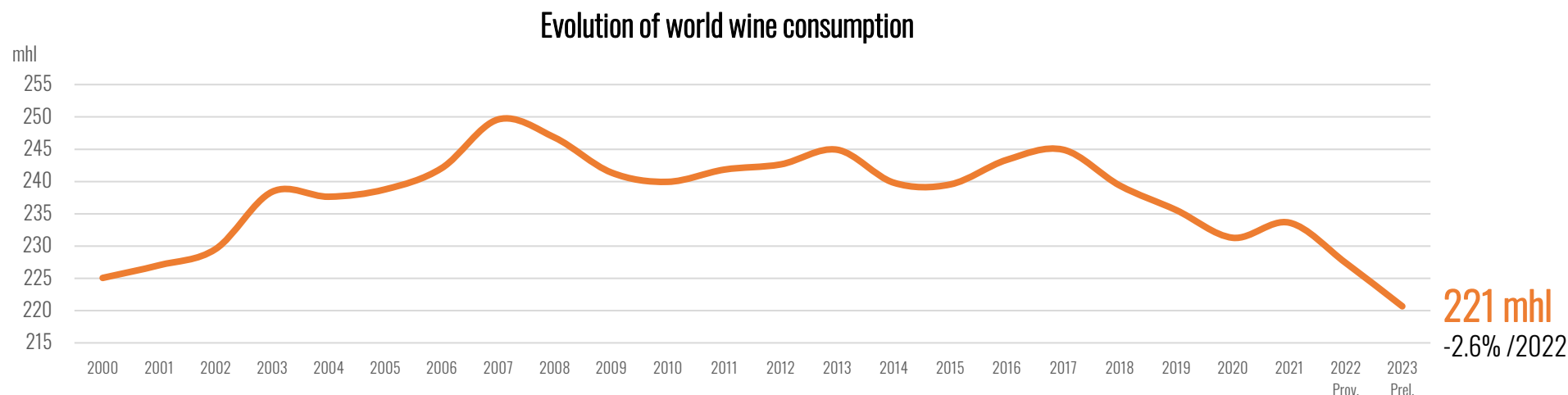






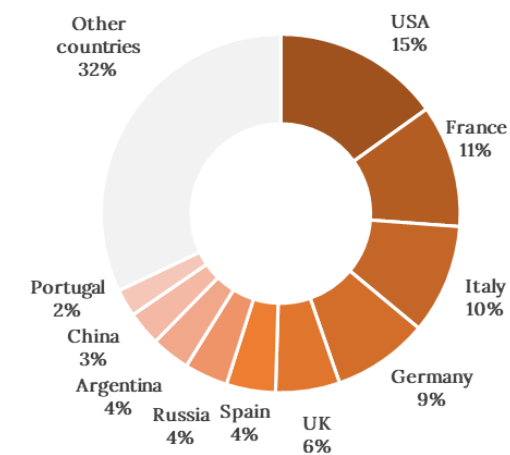
# Wine Consumption

# Wine Consumption



Global wine consumption in 2023 is estimated at **221 million hectolitres**, indicating a decrease of **2.6% compared to 2022's already low figures**. The spike in production and distribution costs, driven by **inflationary pressures**, led to higher wine prices for consumers, who were already dealing with diminished purchasing power. Despite these challenges, **a few major markets demonstrated resilience**.

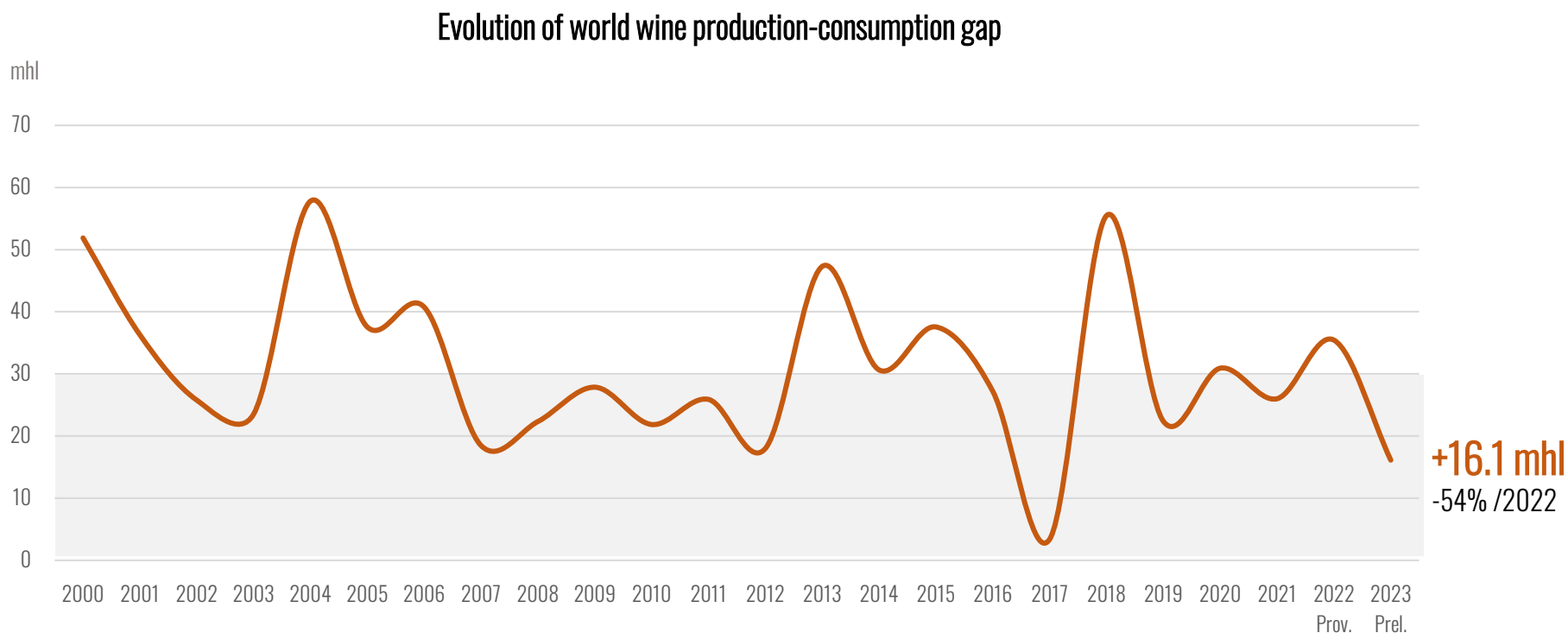
**More than two-thirds (68%) of global consumption is concentrated in the top 10 markets, with the top 5 consuming countries representing 51% of the world total. The EU (107 mhl, -2%/2022) accounts for 48%.**







## Wine Consumption

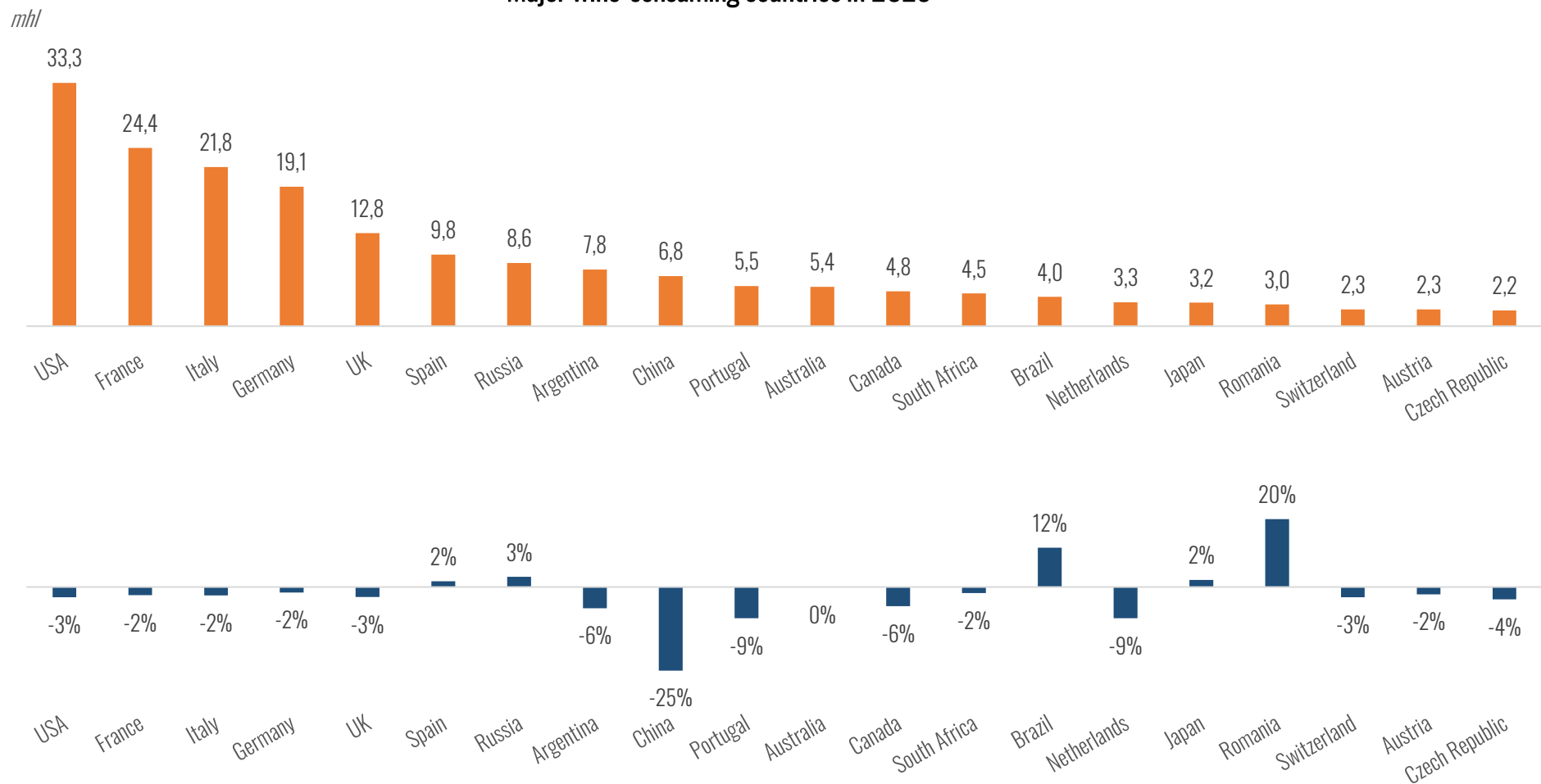


**The difference between wine production and wine consumption is estimated at +16.1 mhl (-54% / 2022). Considering that every year between 25 and 35 mhl of the total wine production are destined for industrial uses (i.e. distillation, vinegar, wine-based beverages, etc), the low production volume of 2023 is expected to bring equilibrium to the world market.**



# Wine Consumption

Major wine-consuming countries in 2023

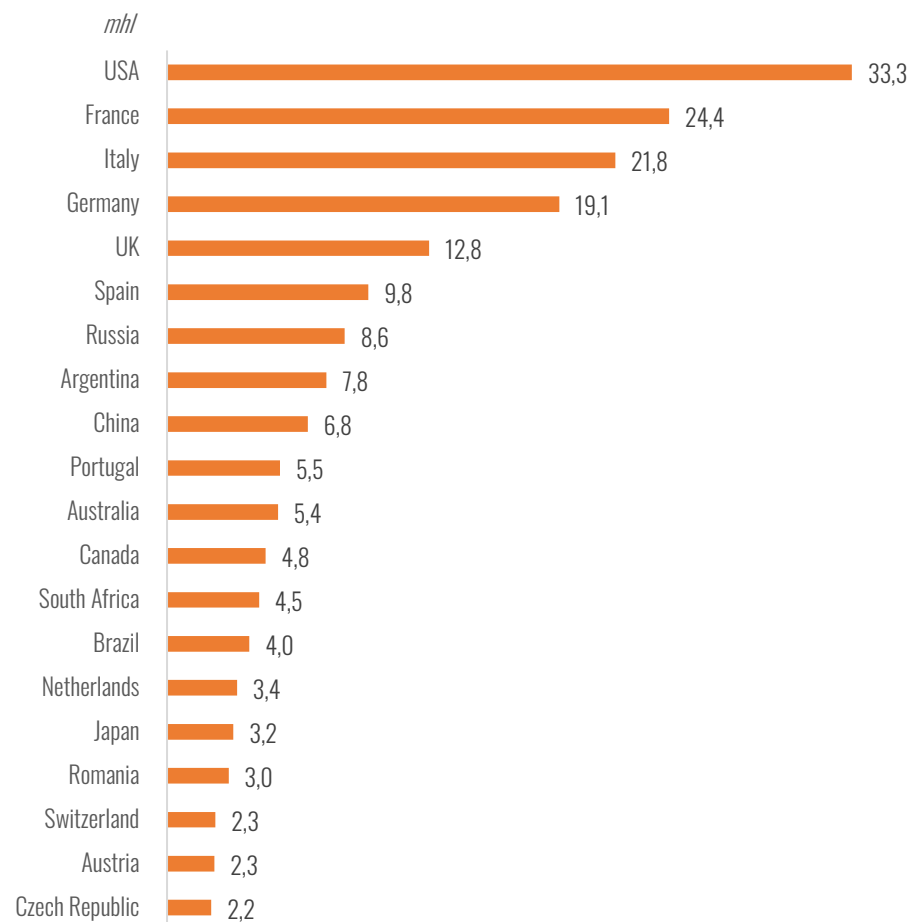






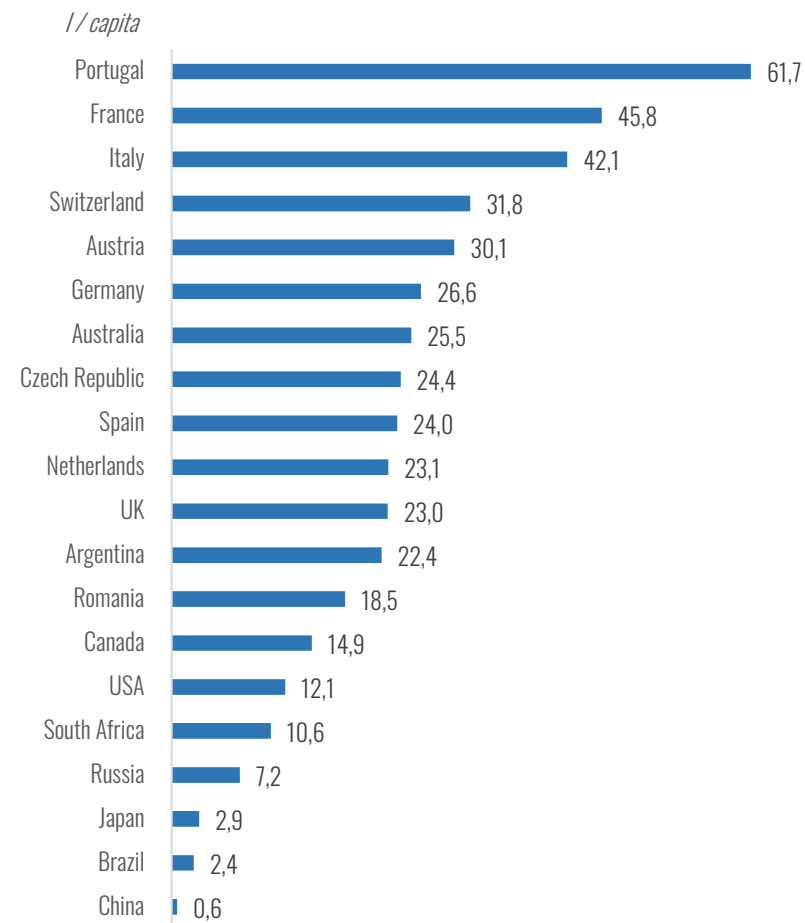
# Wine Consumption

Major countries\* by total consumption in 2023



\*Countries with 2023 wine consumption above 2 mhl

Consumption per capita +15 in major consuming countries\* in 2023





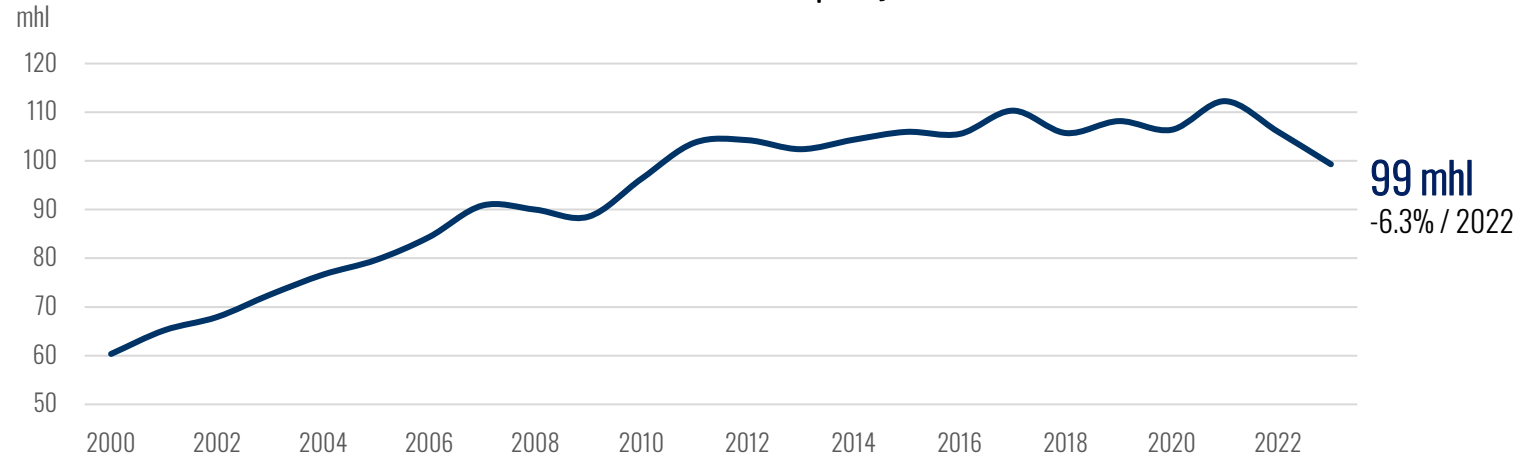
# International Trade in Wine





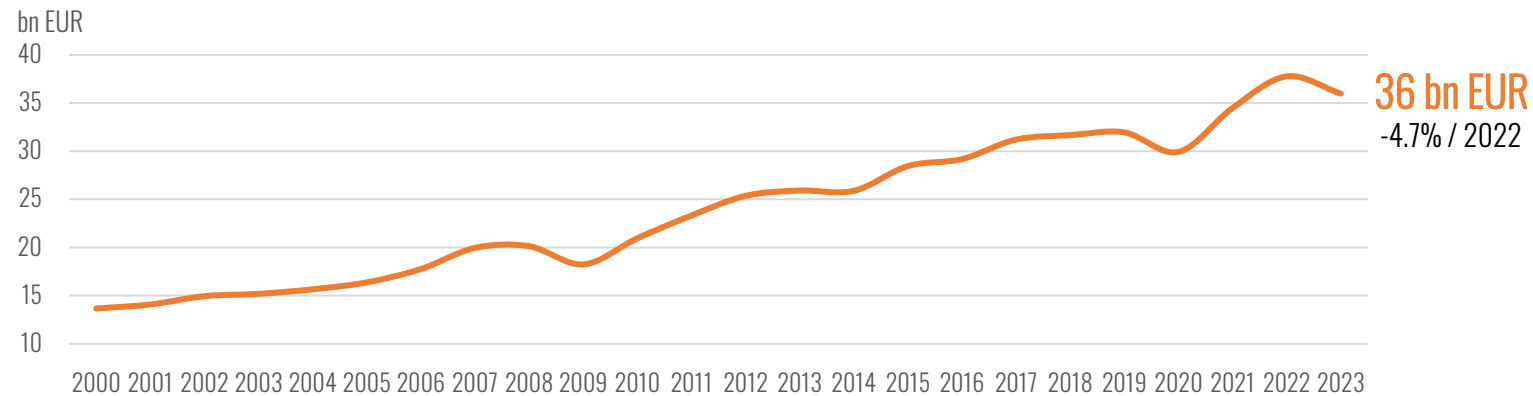
# International Trade in Wine

Evolution of world wine export by VOLUME



World wine exports in 2023 have **decreased by 6.3% in volume** compared to 2022, recording the **lowest volume since 2010**.

Evolution of world wine export by VALUE

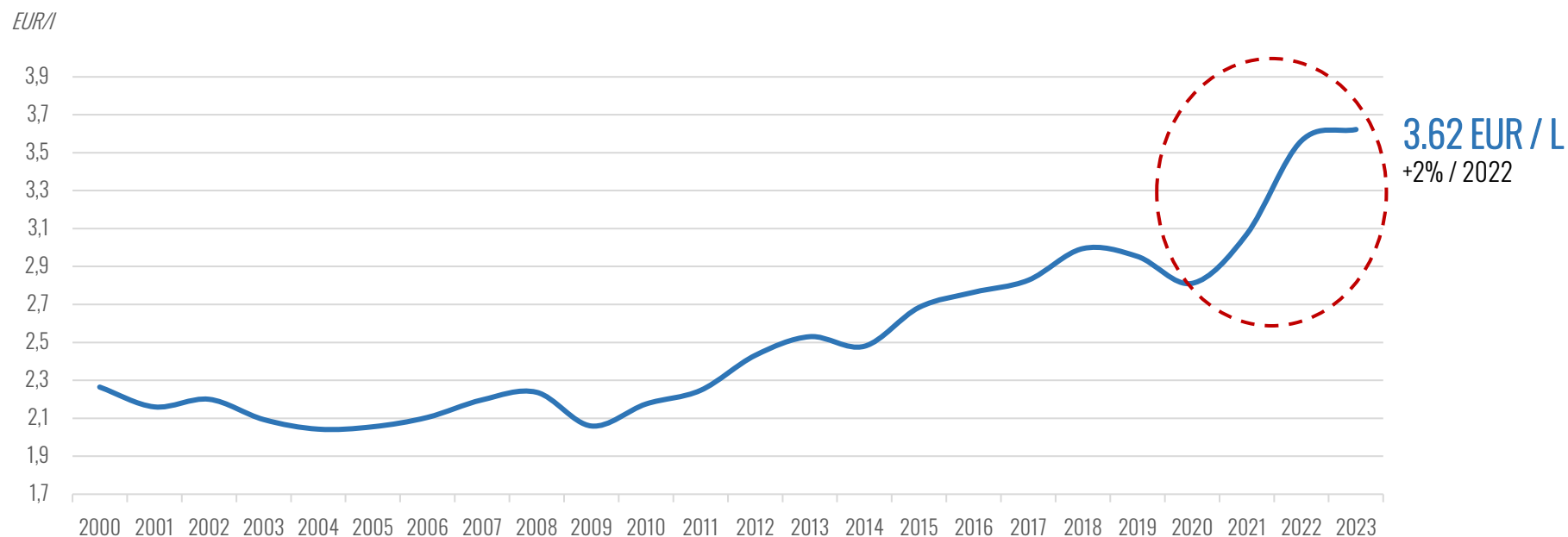


Despite a **4.7% decrease** compared to the record high of 2022, the global wine export value in 2023 reached **36.0 billion EUR**, the **second highest ever recorded**.



# International Trade in Wine

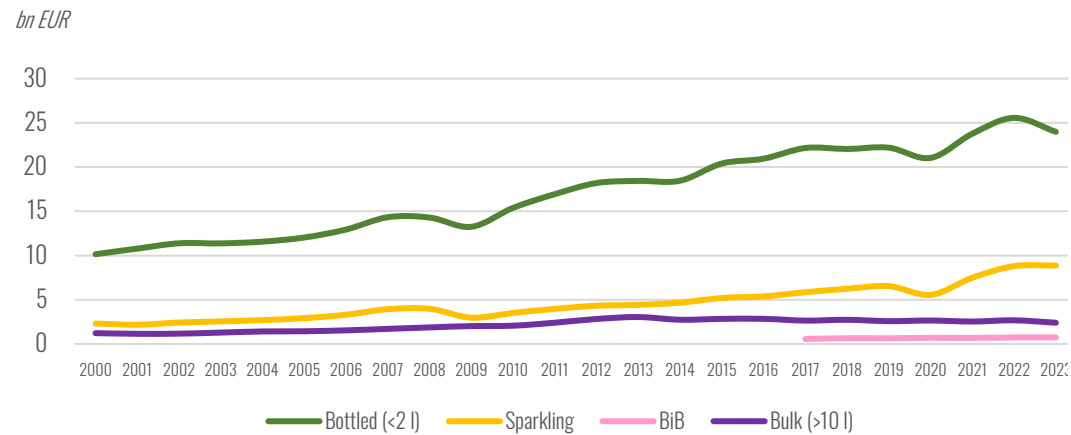
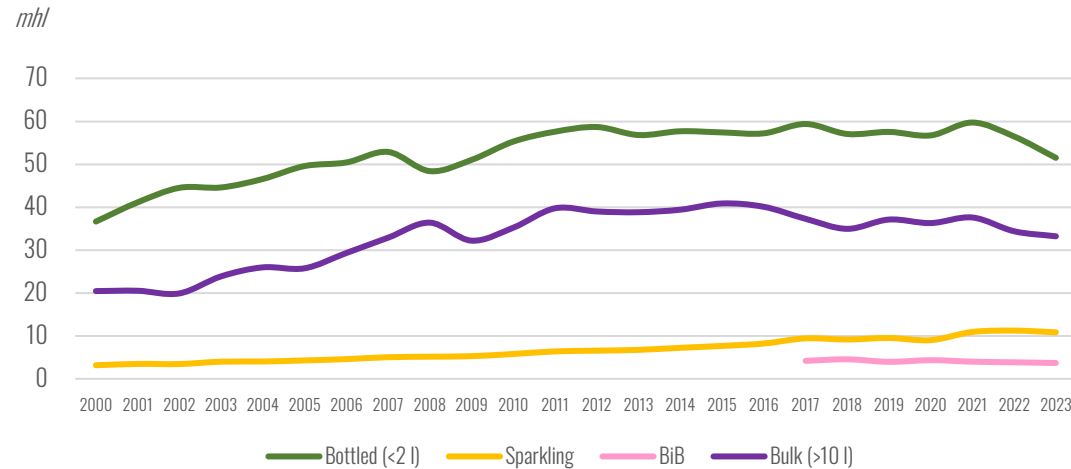
Evolution of world average export price



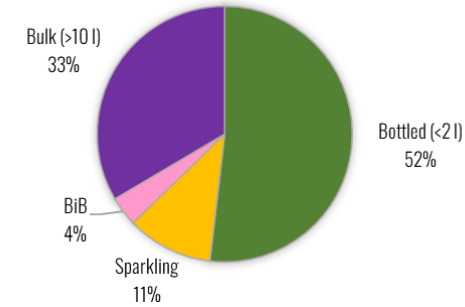
The average world export price of wine in 2023 peaked at **3.62 EUR/L**, the **highest ever recorded**. This represents **a significant increase of 29% since 2020**. This rise in prices primarily stems from higher costs incurred by producers, importers, and distributors, a **direct consequence of global inflationary pressures**.



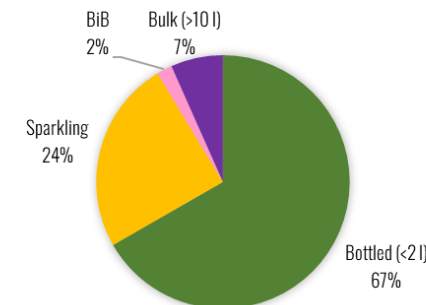
# International Trade in Wine



Breakdown of global trade VOLUME in 2023



Breakdown of global trade VALUE in 2023



## Bottled

Volume: -9% / 2022

Value: -6% / 2022

## Sparkling

Volume: -4% / 2022

Value: +1% / 2022

## Bag-in-Box (BiB)

Volume: -4% / 2022

Value: +0% / 2022

## Bulk

Volume: -4% / 2022

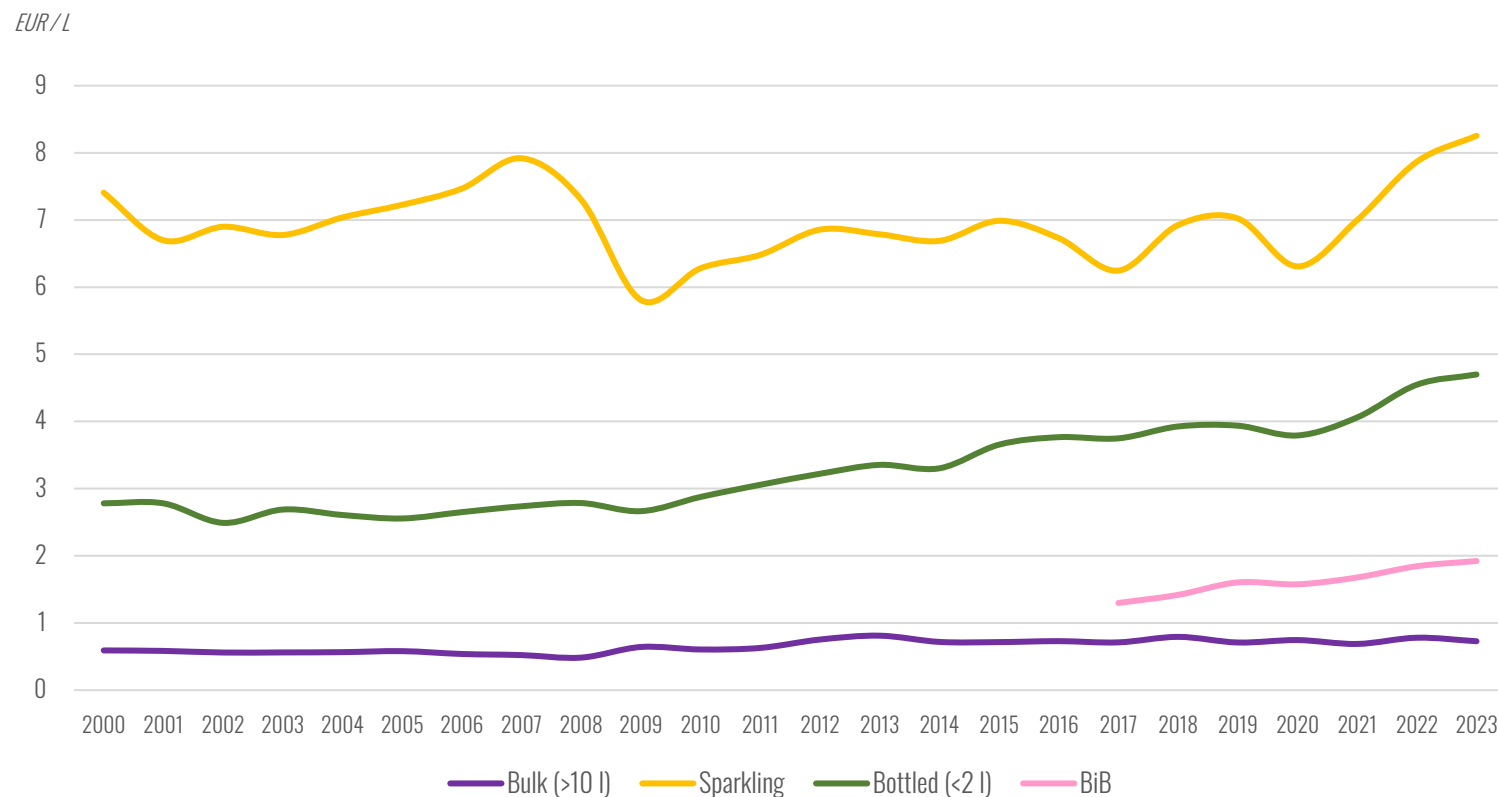
Value: -10% / 2022





# International Trade in Wine

Evolution of world average export price by category



## Sparkling

+5%/2022

+31%/2020

## Bottled

+3%/2022

+24%/2020

## Bag-in-Box (BiB)

+4%/2022

+22%/2020

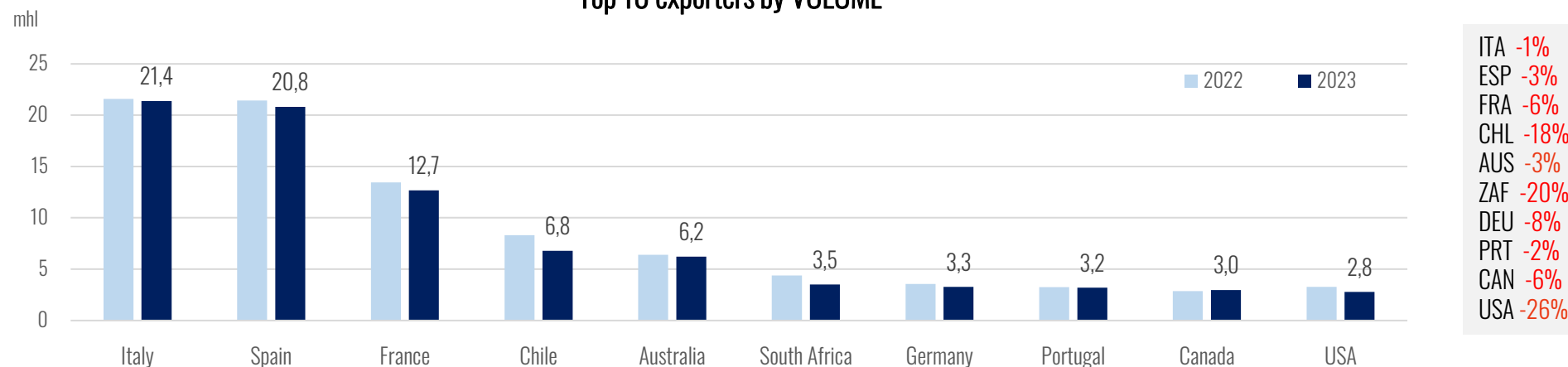
## Bulk

-7%/2022

-2%/2020

# Main Wine Exporters

## Top 10 exporters by VOLUME



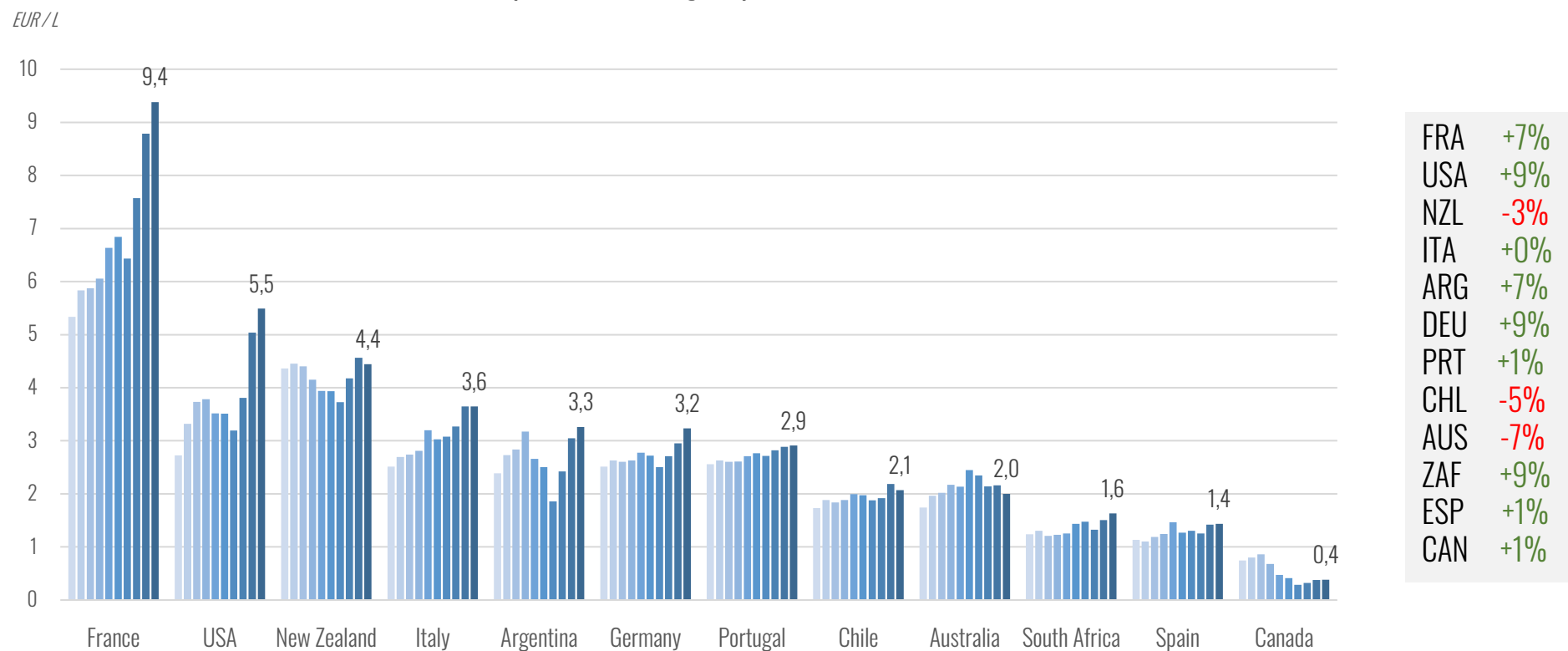
## Top 10 exporters by VALUE





## Main Wine Exporters

Major Exporters by Average Export Price, 2014-2023

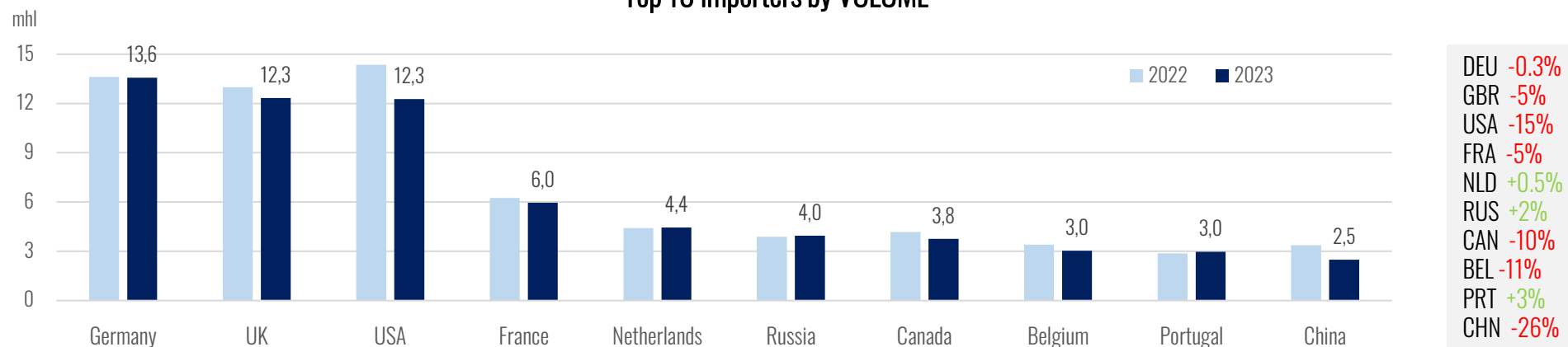


*\*Countries listed as top 10 exporters, by volume or value in 2023*

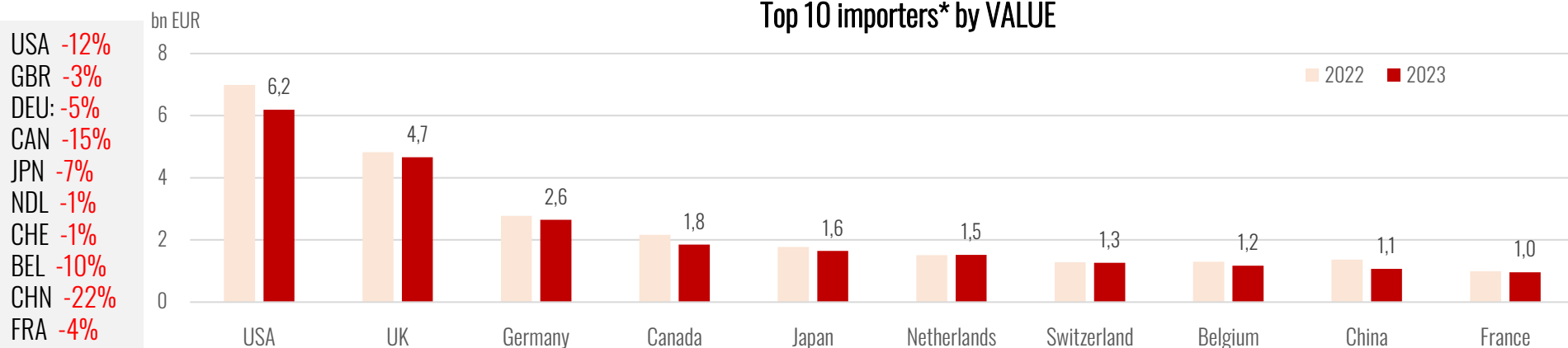


# Main Wine Importers

## Top 10 importers by VOLUME



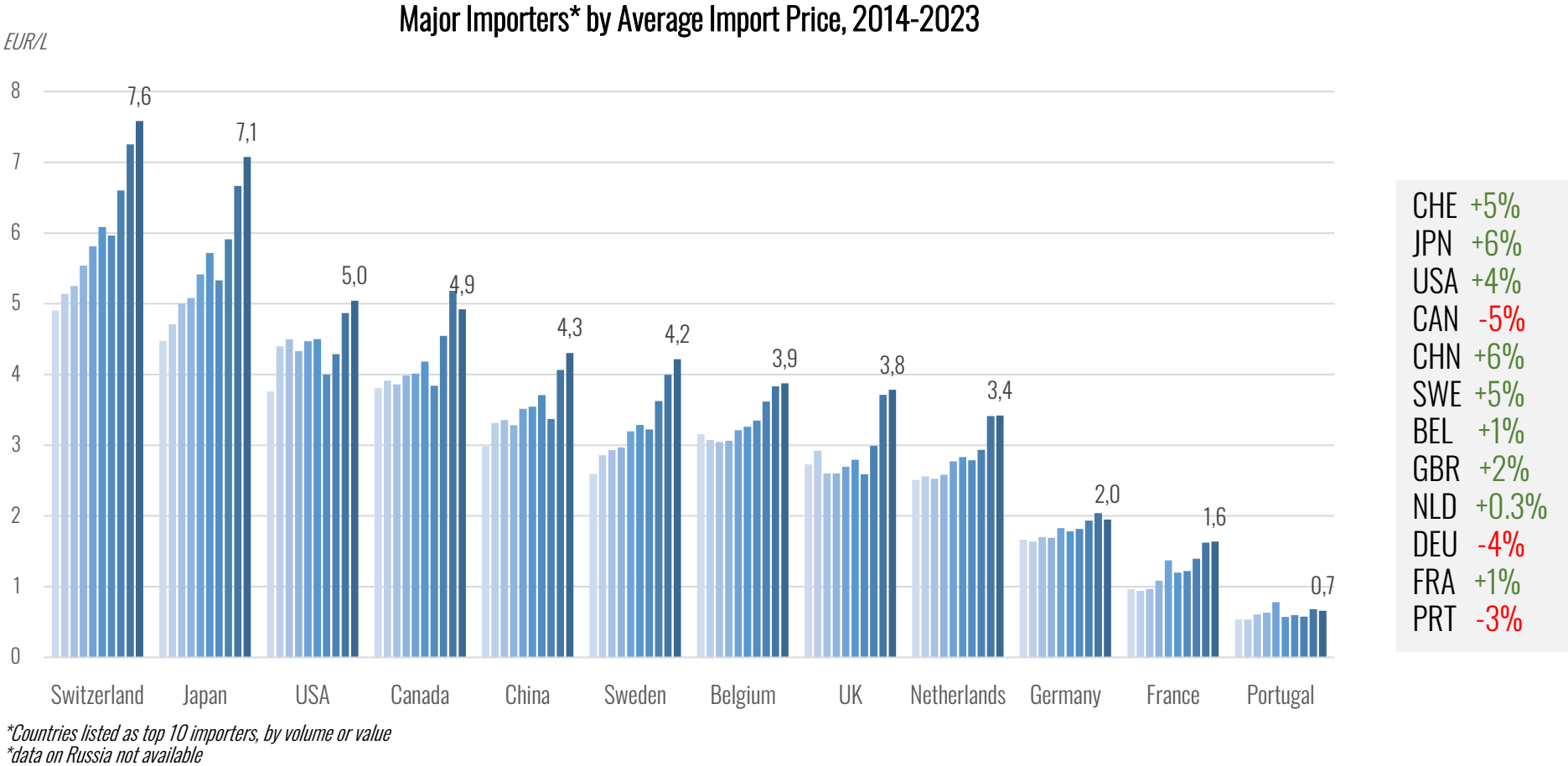
## Top 10 importers\* by VALUE



\*data on Russia not available

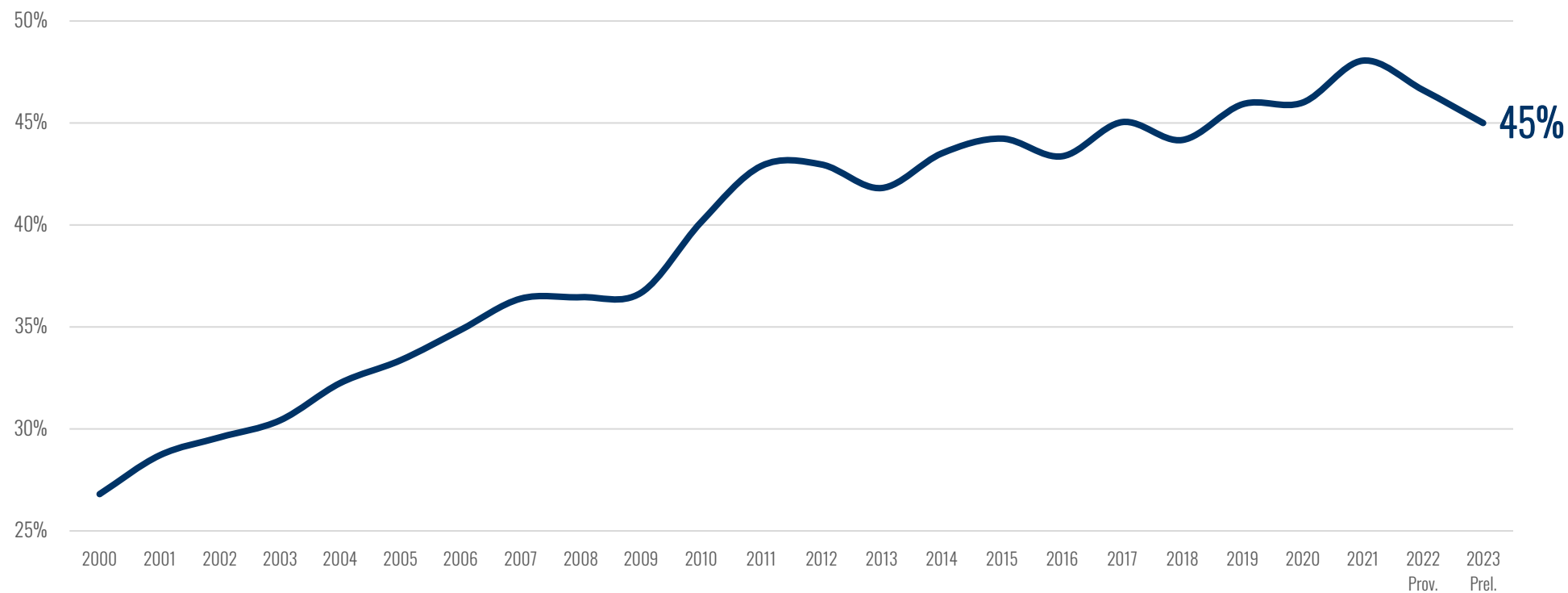


# Main Wine Importers





## Market Internationalisation Index



Wine market internationalisation index = ratio between the volumes of world wine exports and world wine consumption

→ **45% of the wine consumed worldwide in 2023 is imported wine**, a sign that the world wine market is highly globalised



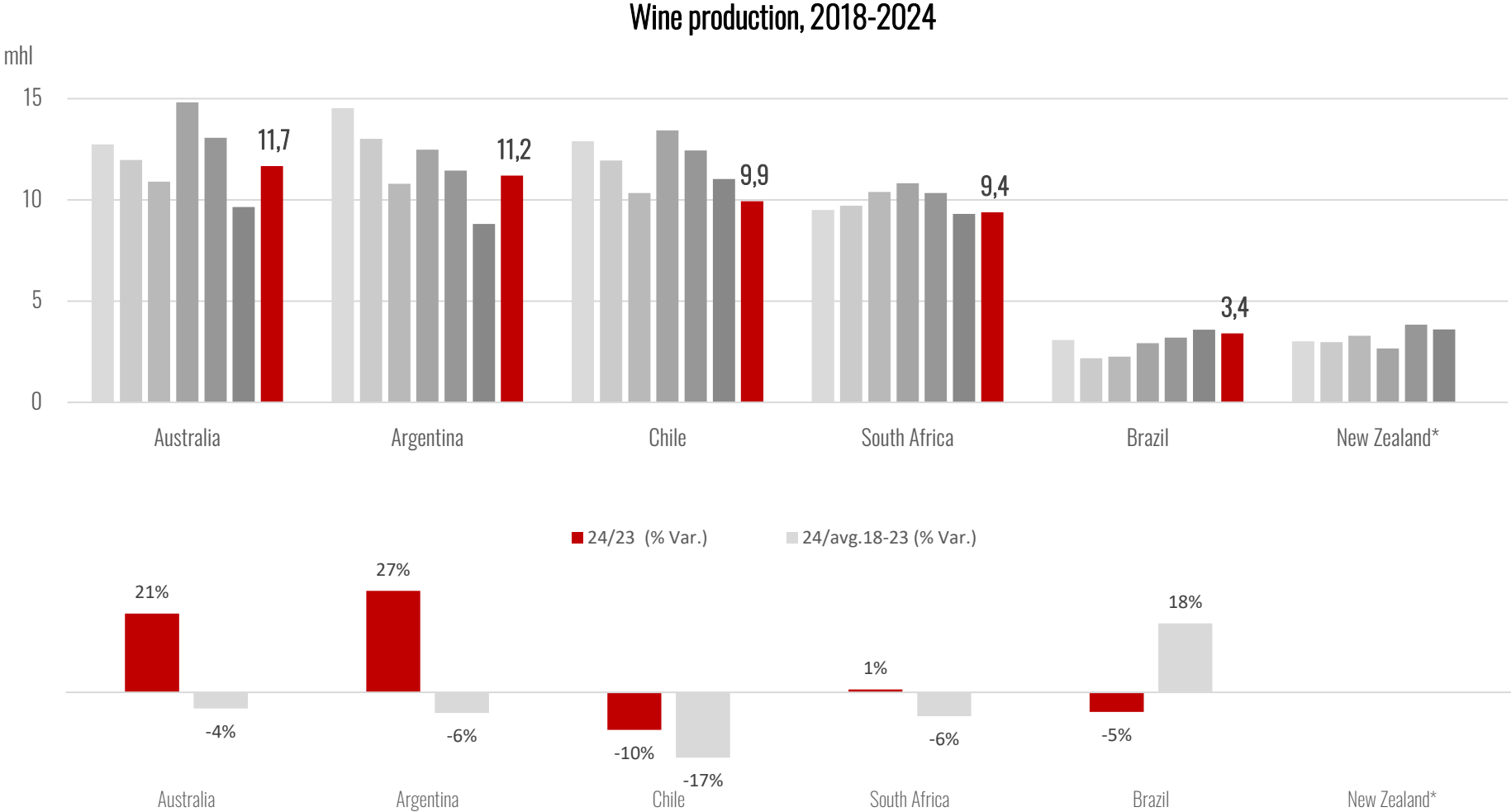


# Wine Production in the Southern Hemisphere in 2024

*First Preliminary Estimates*

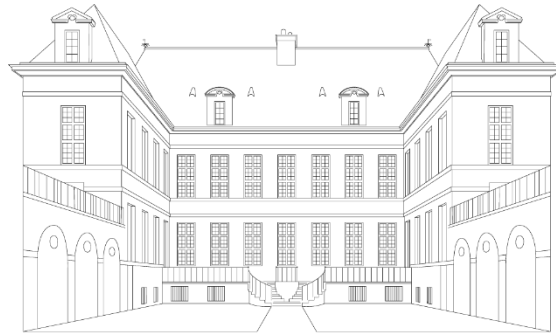


# Preliminary Estimates Wine Production 2024



\*Data 2024 not available yet

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