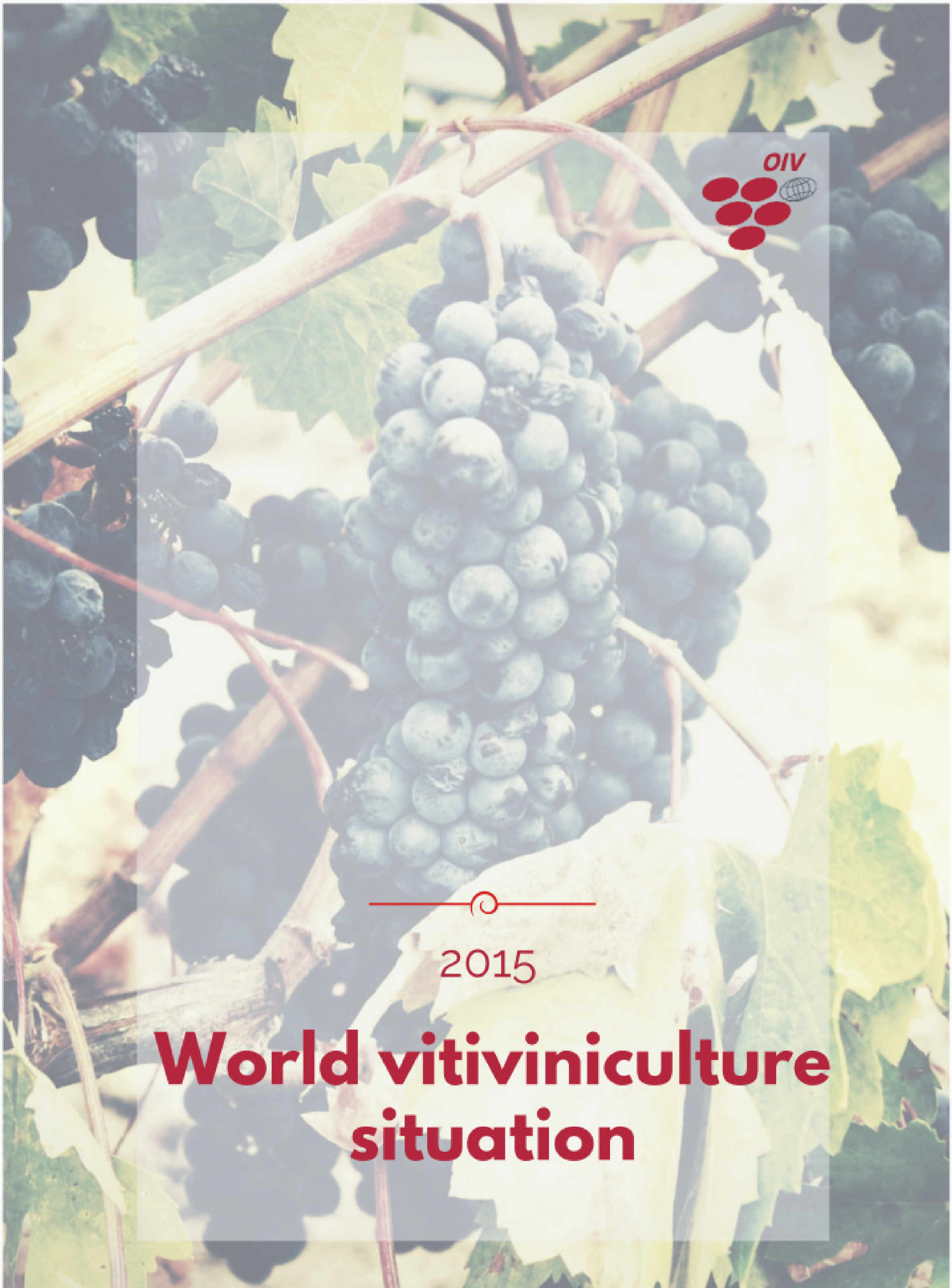


OIV

2015

World vitiviniculture situation

Introduction

The different sections in this report are notably focused on presenting the rate of production and consumption, as well as the degree of balance between these sectors in the wine market.
This annual statistics reports provides data on the world's vitiviniculture situation in the year 2014. It presents an overview on the global, regional and country information on vines, grapes, dried grape and wine.

The different sections in this report are notably focused on presenting the rate of production and consumption, as well as the degree of balance between these sectors in the wine market.
These data collected annually confirm the OIV's commitment to providing timely and accurate information towards the improvement of the vitiviniculture sector.

This 2015 report includes sections on:

I. Surface Area
II. Global grape production
III. Wine production
IV. Consumption
V. International wine trade

The data published in this report have been harmonized with those available to the United Nations Food and Agriculture Organization (FAO).

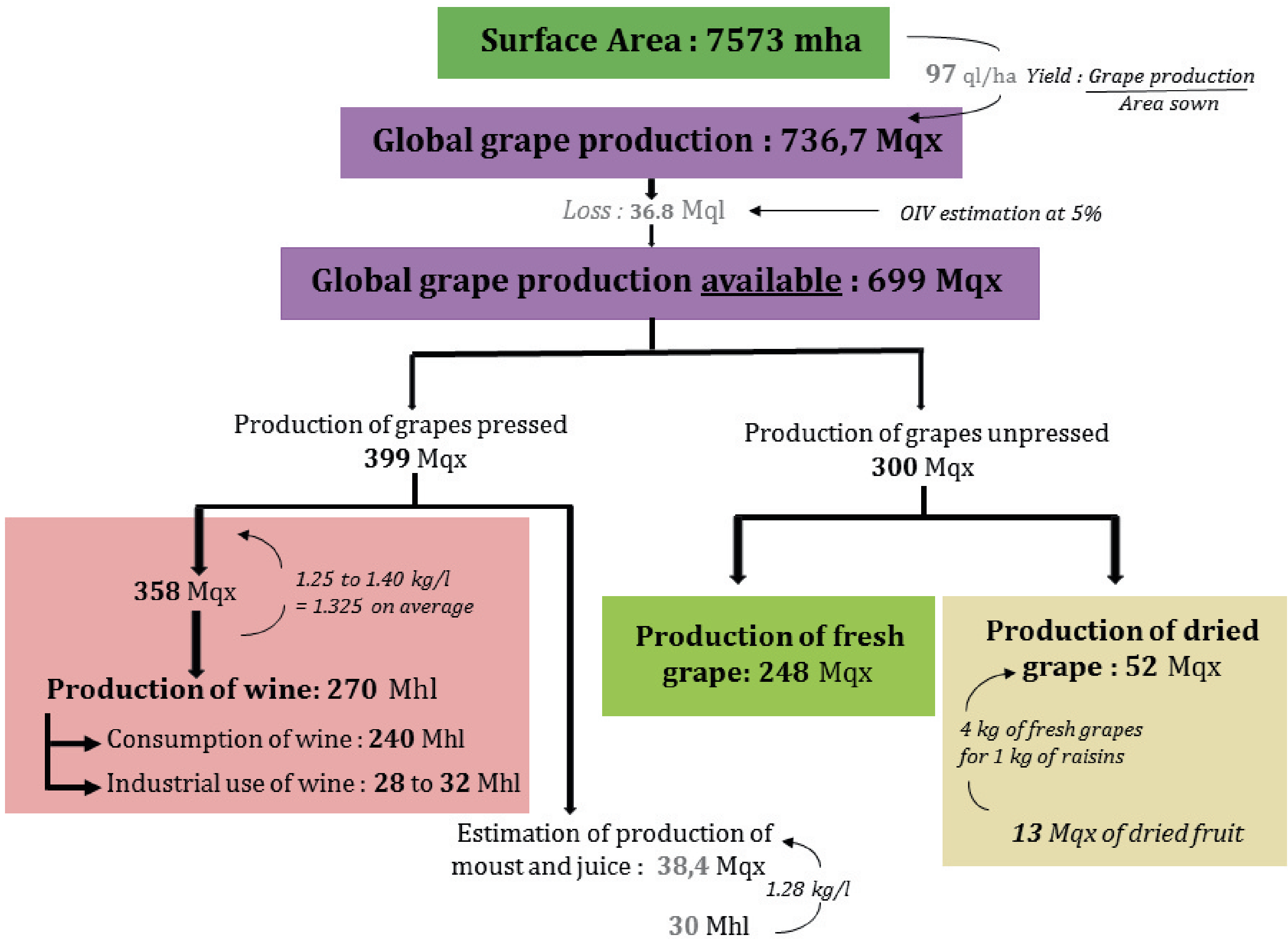
We have derived these data from a variety of sources. In hierarchical order of importance these sources are:

- data obtained from a questionnaire completed by Member States
- data from public sources, such as national statistical agencies
- data from the European Commission

Readers are welcome to use the information provided in the following pages, but are requested to cite OIV as the source.
For technical inquiries please contact stats@oiv.int
For media inquiries please contact press@oiv.int
N.B : this report builds on data from OIV countries questionnaires received by May 2015.

Abbreviations used:
kha: thousands of hectares
Mha: millions of hectares
kqx: thousands of quintals (100 kg)
Mqx: millions of quintals (100 kg)
khl: thousands of hectoliters
Mhl: millions of hectoliters

World Vitiviniculture data framework: 2014

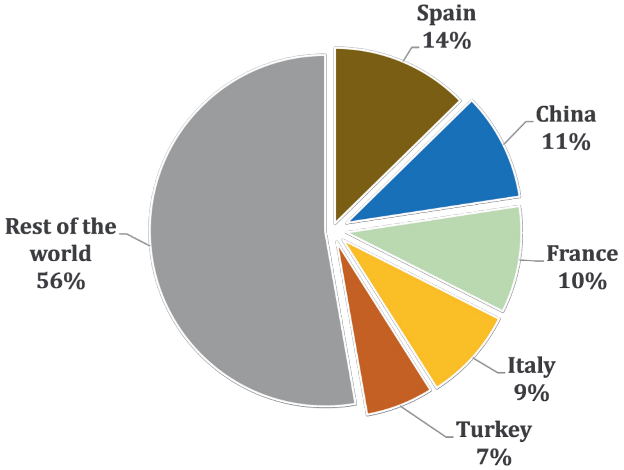


The part of the total production of unpressed grape is 45% and, within these products, that of the production destined for the consumption of fresh grape reached 83%.
Considering that 1.325 kg of fresh grape are necessary to obtain 1 hl of wine, we can approach with calculation the part of the world production of grape that is pressed but not fermented (estimated at 10%).

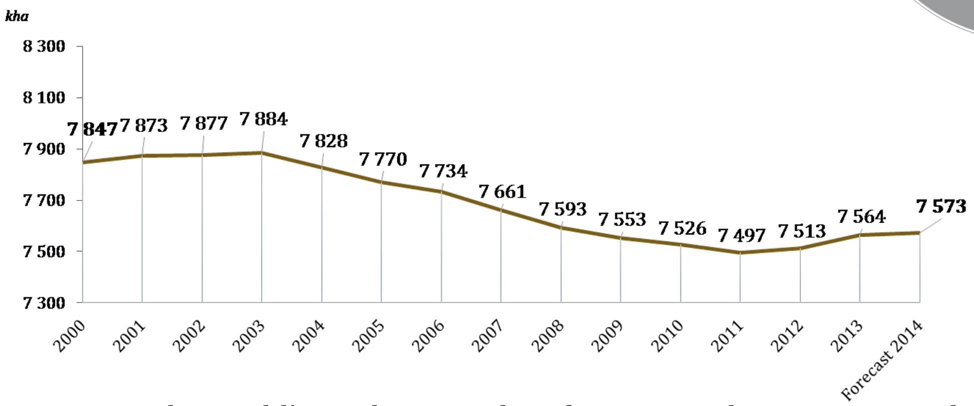
Surface Area

Including the area not yet in production, whether harvested or not, and regardless of the grapes' final destination

7573 kha is the global area under vines in 2014
5 countries represent
50% of the world vineyard



Evolution of world area under vines



Since 2000 the world's total vineyard surface area is decreasing, mainly due to the reduction of European vineyards.

Area under vine[1]

kha	2010	2011	2012	2013	2014 Forecast
Spain	1 082	1 032	1 033	1 037	1 038
China	588	633	709	760	799
France	804	796	792	793	792
Italy	739	720	713	705	690
Turkey	514	508	497	504	502
USA	404	413	412	424	425
Argentina	218	219	222	224	228
Portugal	236	236	233	229	224
Chile	204	206	206	208	211
Romania	191	191	192	192	192
Australia	171	170	162	157	154
South Africa	132	133	135	133	132
Greece	112	110	110	110	110
Germany	102	102	102	102	102
Brazil	92	90	91	90	89
World Total	**7526**	**7 497**	**7 513**	**7 564**	**7 573**

(1) Include data/comments received by May 2015

Since 2000 area under vine has **fallen considerably** in Spain, France and Italy. This is mainly influenced by the EU grubbing-up programme endend in 2011.
This reduction has been partially offset by the increase in the planted surface areas in the rest of the world. In recent years: very strong increasing of the Chinese vineyards, and a slight increase in Argentina and Chile.
This reduction has been partially offset by the increase in the planted surface areas in the rest of the world. In recent years: **very strong increasing of the Chinese vineyards**, and a slight **increase** in Argentina and Chile.

Grape production

Grapes intended for all use

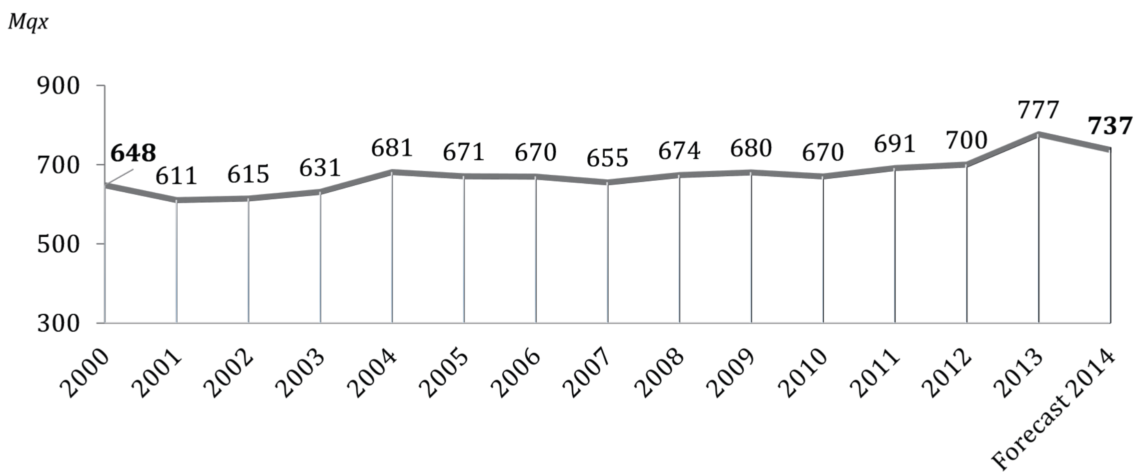
737 Mqx is the world production of grapes in 2014

41% of total world grape is produced in **Europe**

29 % in **Asia** and

21% in **America**

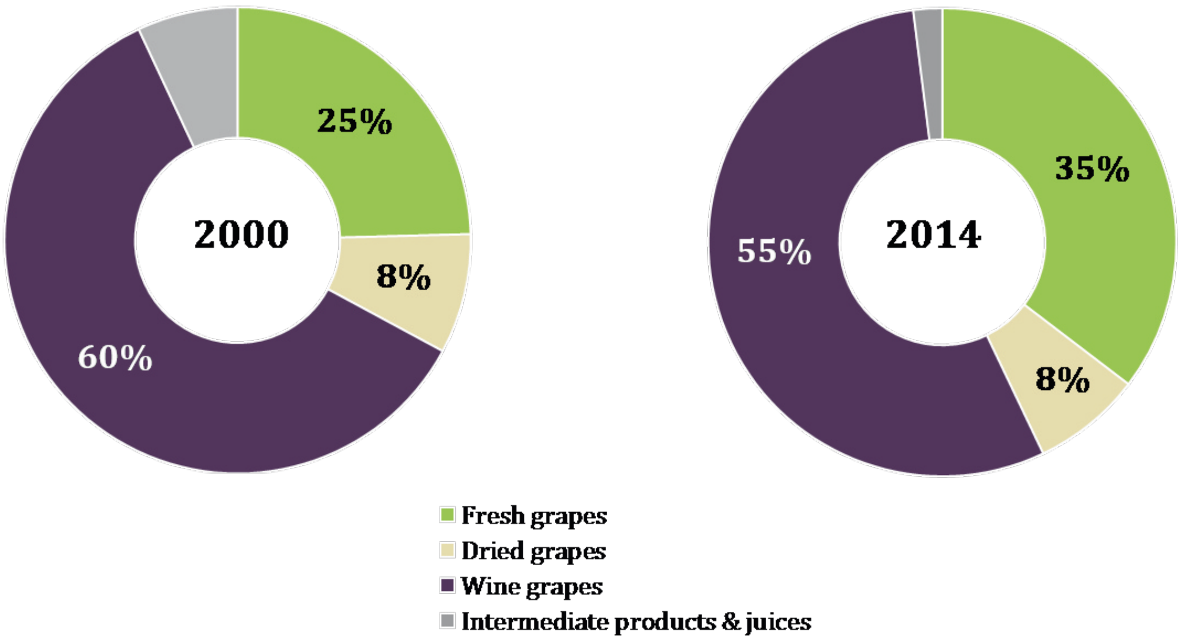
Evolution of global grape production



An increased trend in grape production, with an average annual growth rate since 2000 of **+1.1 %**. While the area under vine **decreases**, grape production has been **increasing** since 2000: **this is partly due to an increase in yields** but also to the more favorable average climate conditions as well as to a partial redistribution of the vineyard.

Grape production

Share of total world grape production by type of product



There is an upward trend in part of total production of unpressed fresh grape.

Grape production

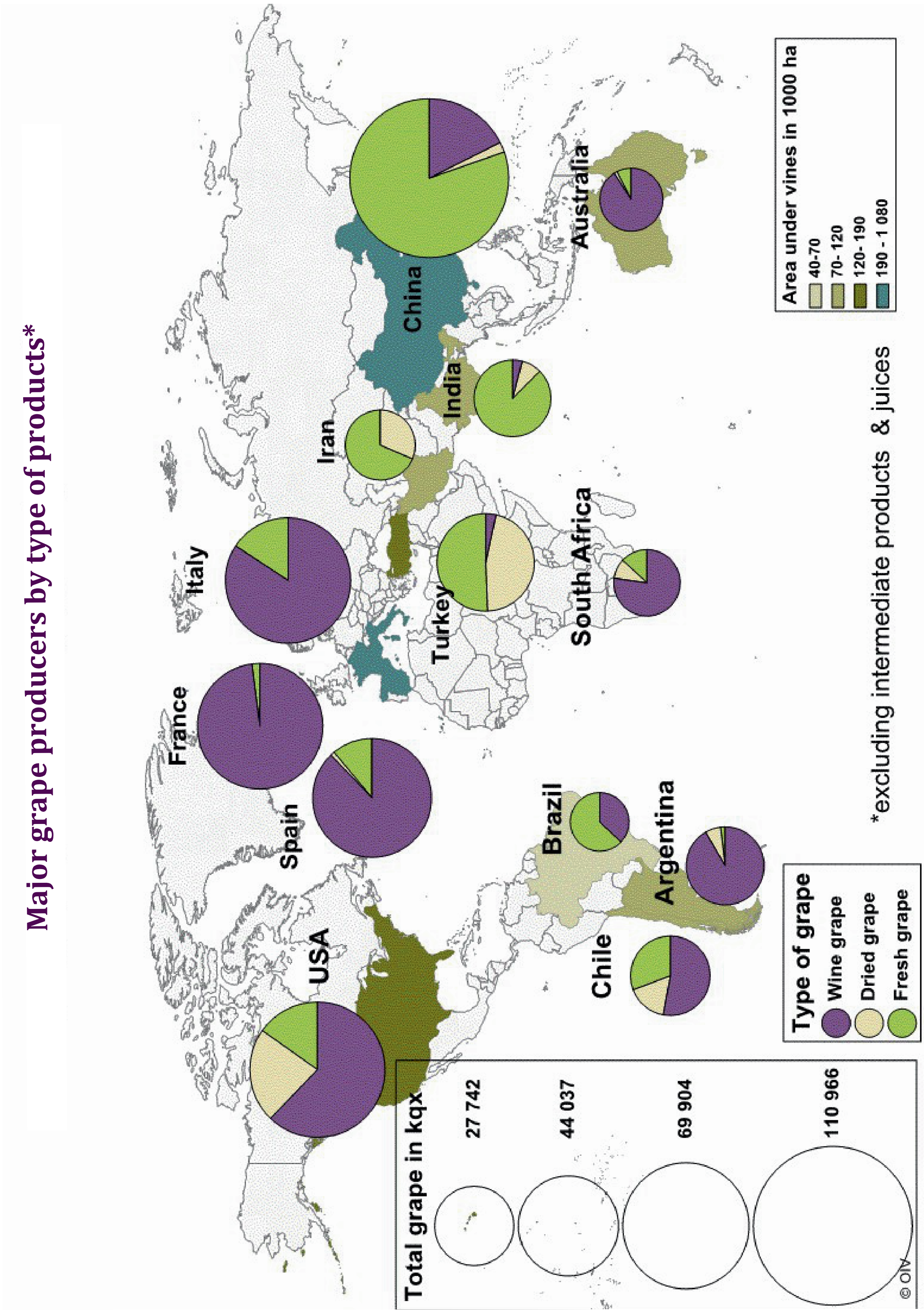
Global grape production						By type of products in 2014[1]		
in kqx	2010	2011	2012	2013	2014 Forecast	Fresh grape	Dried grape	Wine grape[2]
China	86 517	91 748	106 425	116 500	111 015	84 677	420	14 811
USA	67 918	64 558	68 305	78 343	70 471	7 209	3 200	29 548
France	58 555	65 889	53 371	54 847	69 433	441	...	61 875
Italy	77 878	71 155	69 180	80 103	68 944	10 377	..	59 279
Spain	61 193	56 952	53 313	76 460	62 312	2 886	4	50 630
Turkey	42 550	42 964	41 851	40 116	41 754	18 906	4 295	816
Chile	25 445	29 537	32 000	33 616	27 907	7 757	930	13 913
Argentina	27 167	30 075	23 660	28 717	26 893	125	180	20 137
India	8 807	12 350	24 854	25 853	26 020	21 949	336	229
Iran	22 557	21 127	21 500	20 464	21 740	13 561	1 600	...
World Total	**670 016**	**691 325**	**700 284**	**776 777**	**736 732**	**247 675**	**13 056**	**357 750**

...: Not available data

1: Excluding intermediate products and juices

*2: OIV conversion factor used: production of wine *1,325 kg of fresh grape, average quantity necessary to obtain 1hl of wine*

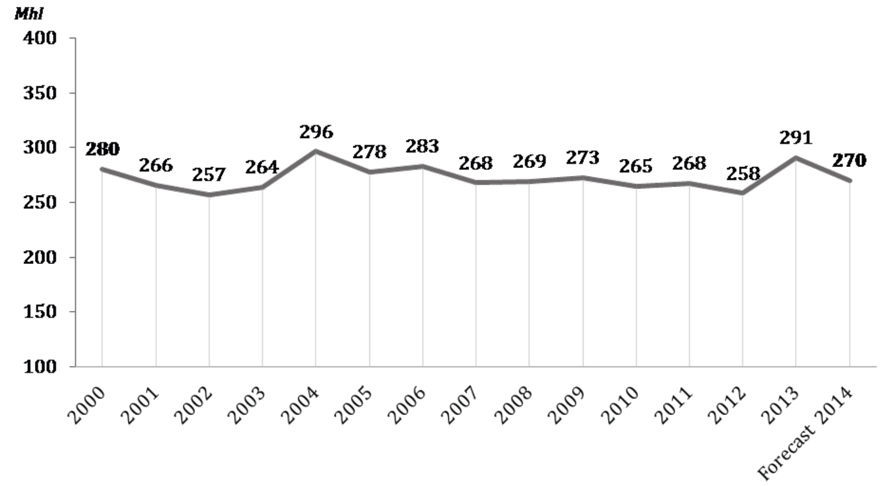
Grape production



Wine Production

270 Mhl is the global wine production in 2014

Trends in world wine production



2014 world wine production (excluding juice & musts) decreased by 21 Mhl compared with high 2013 production. This global wine production may therefore be described as a fairly high average.

In 2014, France is the big wine producing country. Italy, Spain and the USA record a decline in production, in comparison with the very high production levels in 2013.

Wine production (1)

Mhl	2010	2011	2012	2013	2014 Forecast (2)	2014/2013 Variation in volume	2014/2013 Variation in %
France	44,4	50,8	41,5	42	46,7	4,7	11%
Italy	48,5	42,8	45,6	54	44,7	-9,3	-17%
Spain	35,4	33,4	31,1	45,3	38,2	-7,1	-16%
USA	20,9	19,1	21,7	23,6	22,3	-1,3	-5%
Argentina	16,3	15,5	11,8	15	15,2	0,2	1%
Australia	11,4	11,2	12,3	12,3	12	-0,3	-2%
South Africa	9,3	9,7	10,6	11	11,3	0,3	3%
China	13	13,2	13,5	11,8	11,2	-0,6	-5%
Chile	8,8	10,5	12,6	12,8	10,5	-2,3	-18%
Germany	6,9	9,1	9,0	8,4	9,2	0,8	9%
Portugal	7,1	5,6	6,3	6,3	6,2	-0,1	-2%
Romania	3,3	4,1	3,3	5,1	3,7	-1,4	-27%
New Zealand	1,9	2,4	1,9	2,5	3,2	0,7	29%
Greece	3,0	2,8	3,1	3,3	2,9	-0,4	-13%
Brazil	2,5	3,5	3,0	2,7	2,7	0,0	1%
Hungary	1,8	2,8	1,8	2,7	2,6	-0,1	-4%
Austria	1,7	2,8	2,1	2,4	2	-0,4	-16%
OIV World Total	**265**	**268**	**258**	**291**	**270**	**-21**	**-7%**

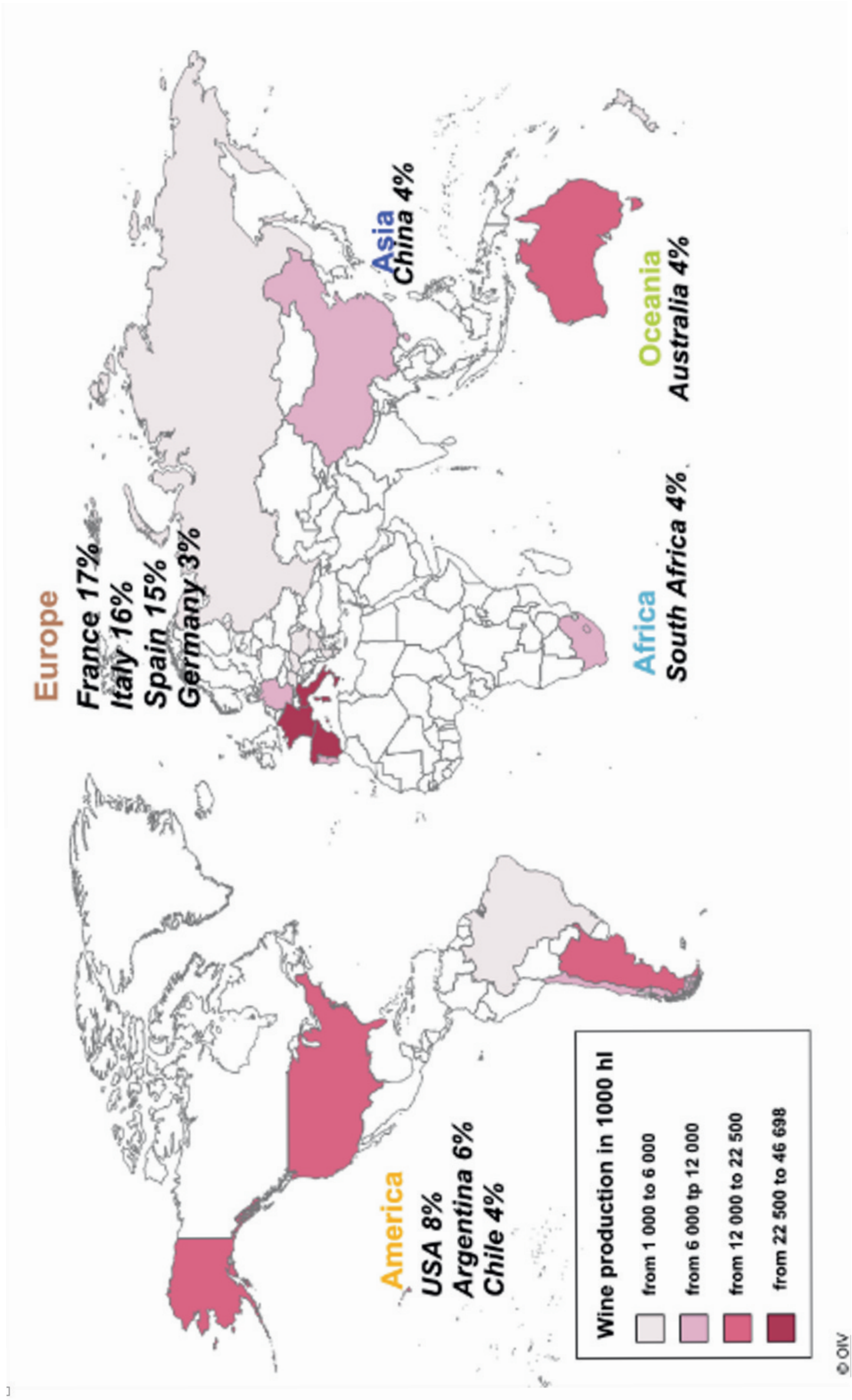
(1): Countries for which information has been provided with a wine production of more than 1Mhl

(2): Include data/comments received by May 2015

Wine Production

2014 World Wine Production: 270 Millions of hectoliters

80% of the world's wine is produced by ten countries

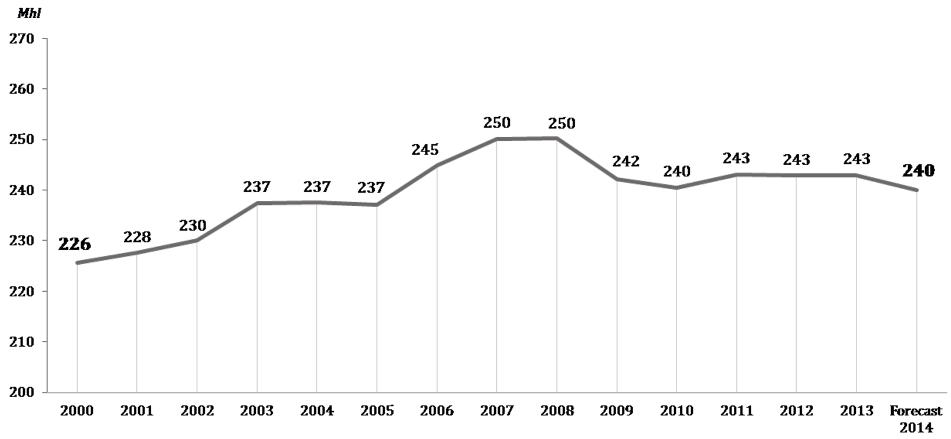


Wine Consumption

Including sparkling and special wines

240 Mhl is the world consumption of wine of grapes in 2014

Evolution of world wine consumption



Wine consumption (1)

Mhl	2010	2011	2012	2013	2014 forecast (2)	2014/2013 Variation in %
USA	28	28	29	30	31	1,1%
France	29	29	29	29	28	-3,1%
Italy	25	23	23	22	20	-6,3%
Germany	20	20	20	20	20	-0,6%
China	16	17	18	17	16	-7,3%
United Kingdom	13	13	13	13	13	-1,4%
Russian Federation	12	12	11	10	10	-7,3%
Argentina	10	10	10	10	10	-4,0%
Spain	11	10	10	10	10	2,0%
Australia	5	5	5	5	5	-0,3%
Canada	5	5	5	5	5	-3,5%
Portugal	5	5	5	4	4	2,4%
South Africa	3	4	3	3	4	7,1%
World Total	**240**	**243**	**243**	**243**	**240**	**-1,2%**

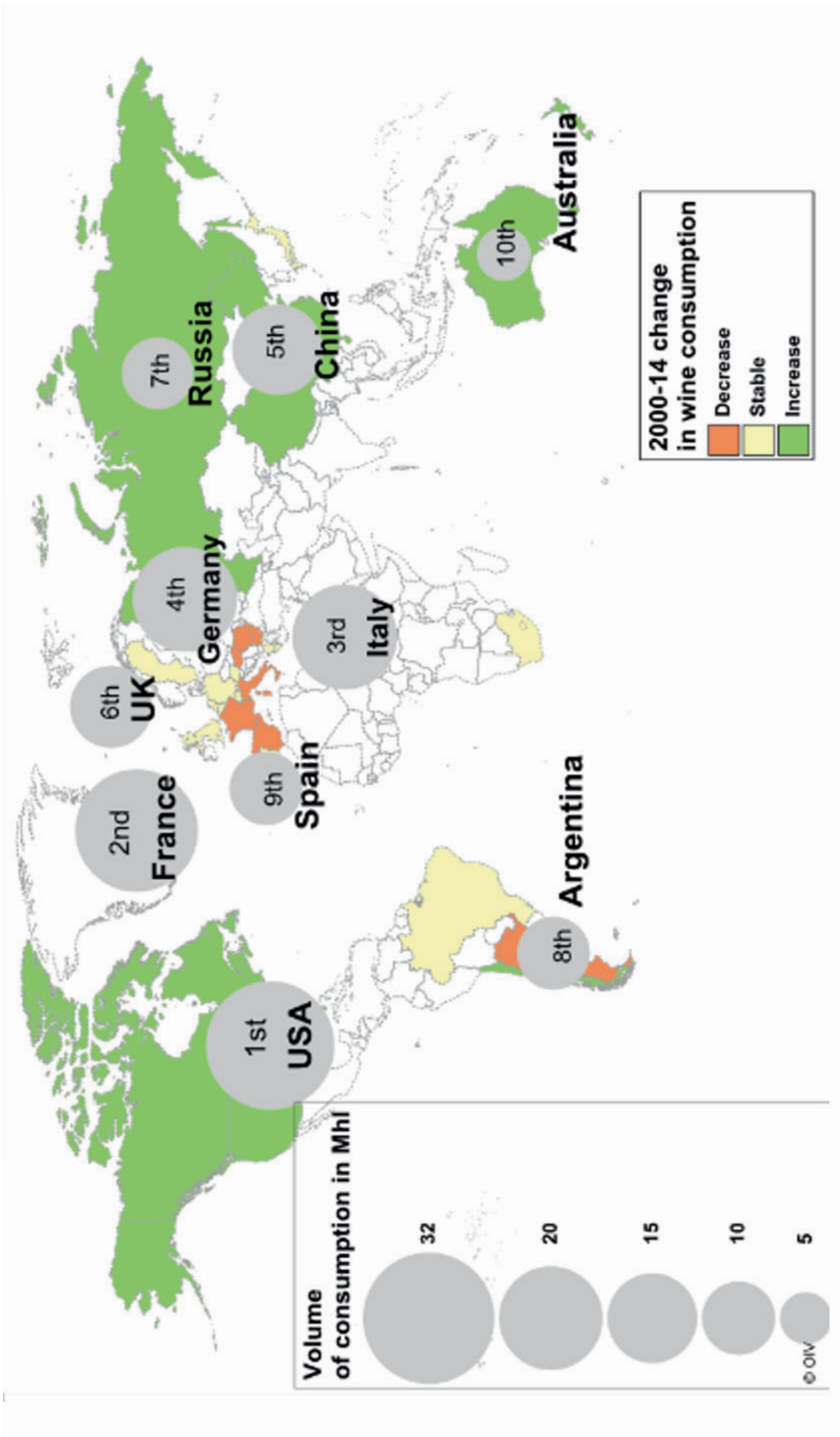
(1): Countries for which information has been provided with a wine consumption of more than 4 Mhl

(2): Include data/comments received by May 2015

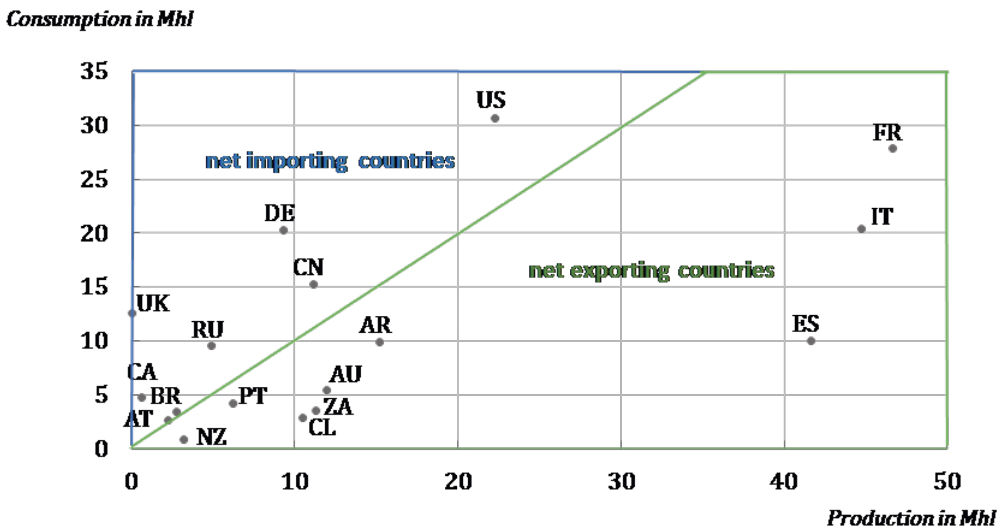
Changes in the consumption market shares also demonstrate that **the growing markets are countries in North America and Asia**. At the same time, **the traditional wine consumer countries recorded a reduction in their share** of the global market.

Wine Consumption

Top 10 wine consumers



Internal market coverage ratio



Measured as the gap between the production and the consumption of wine, we can classify 3 groups of countries:

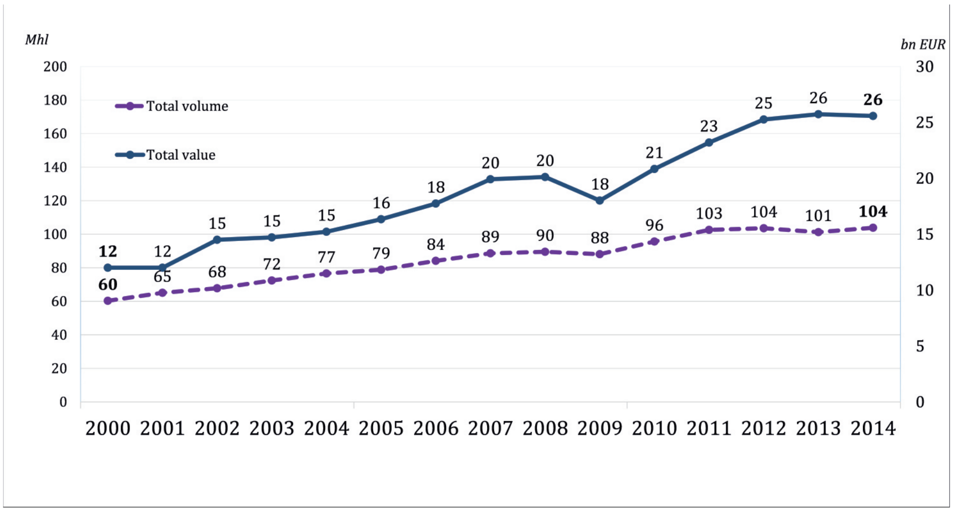
— **Net importing countries** (consumption over production ratio is lower than 100%) This group includes the USA, China, Germany, United Kingdom and Russia, countries with an important domestic market. However, they are very different in terms of openness to international trade.

— **Net exporting countries** (consumption over production ratio is above than 100%). In this group we can identify countries such as France, Argentina, Portugal and Italy, whose domestic market remains a major outlet, and countries with a clear focus on exporting (Spain, Australia, New Zealand).

International Wine Trade

The world trade is considered here as the sum of exports from all countries

Evolution of wine trade in volume and value



In 2014, world trade of wine **increased by 2.5%** in terms of volume, however, in terms of value **remained at the same** as in 2013.

Wine trade in 2014 is largely dominated by Spain, Italy and France, which together represented more than half of the exports in terms of value and 56% of the world market in terms of volume.

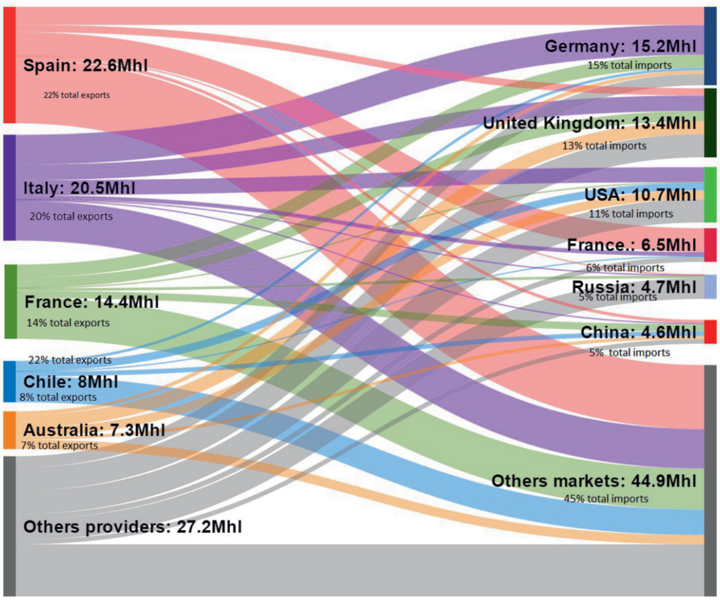
World trade by type of product

Million EUR	2013	2014	Variation (MEUR)	Variation %
Sparkling	4 418	4 657	238	5%
Bottled	18 292	18 191	-101	-1%
Bulk	3 024	2 699	-325	-11%
Total Wine	**25 735**	**25 582**	**-153**	**-1%**

Million hl	2013	2014	Variation (Mhl.)	Variation %
Sparkling	648	693	46	7%
Bottled	5 442	5 494	52	1%
Bulk	3 726	3 773	47	1%
Total Wine	**1 013**	**1 033**	**20**	**2%**

Trade flows in volume in 2014

Presentation of the 5 largest exporters and importers



OIV

18 rue d'Aguesseau
75008 Paris

http://www.oiv.int
+33 1 44 94 80 80

Follow us