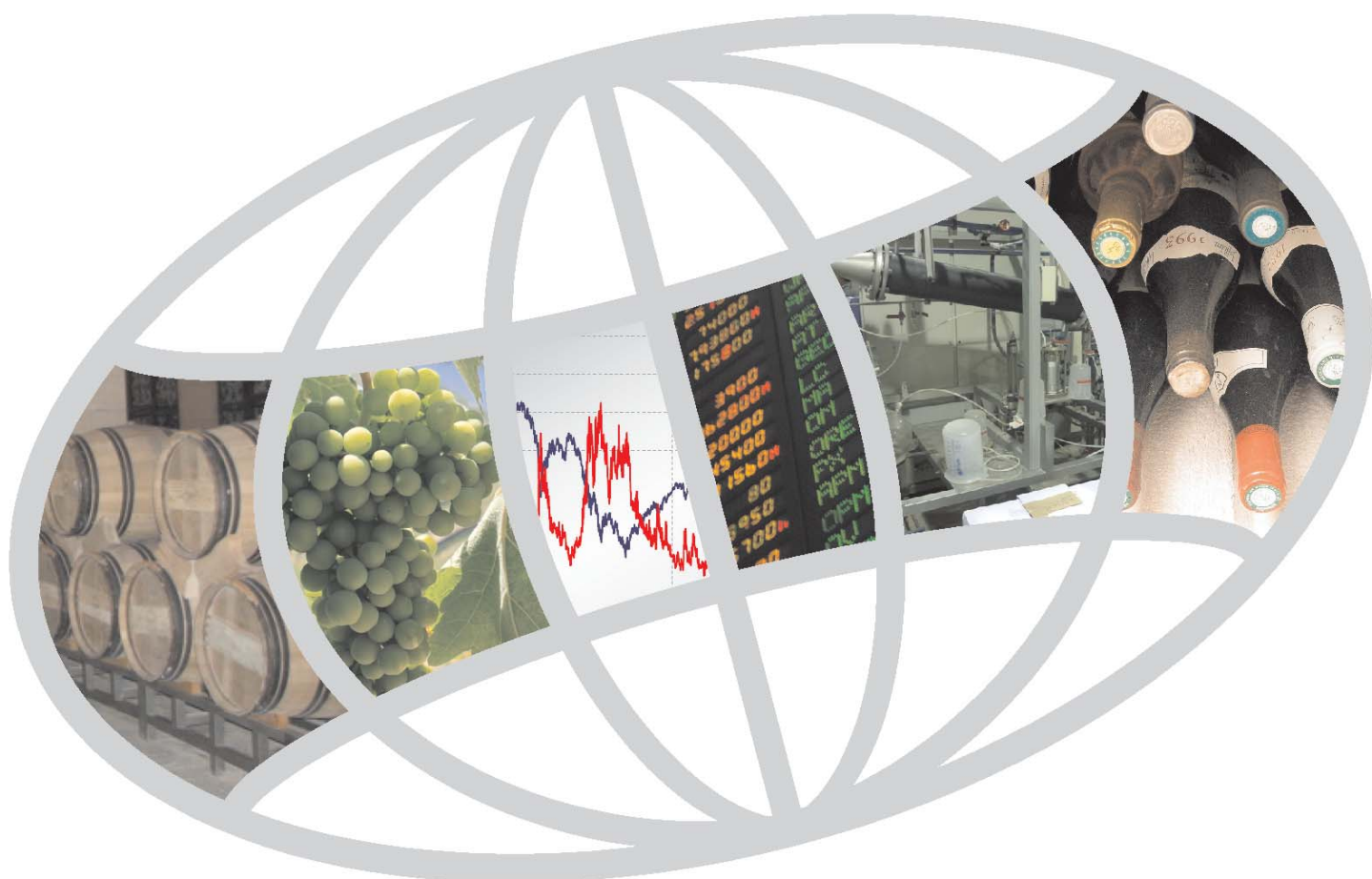




**International Organisation  
of Vine and Wine**  
Intergovernmental Organisation



# **Statistical report on world vitiviniculture 2013**



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  - Evolution of major wine exporters
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# Disclaimer

This report has been prepared by the Statistics department of the International Organisation of Vine and Wine (OIV) under the supervision of Director General Federico Castellucci.

The report deals with topics such as world areas under vines, an overall vitiviniculture production.

A special focus on the value of wine exports and imports has been made in collaboration with the Observatorio Español del Mercado del Vino (OeMV).

Readers are welcome to use the information provided in the following pages, but are requested to cite OIV as the source.

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# Reader's guide

## **Data collection:**

The data published in this report have been harmonized with those available to the United Nations Food and Agriculture Organisation (FAO). We have derived these data from a variety of sources. These sources are:

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

N.B This report builds on data from OIV countries questionnaires received by 15 May 2013.

## **Abbreviations used:**

mha: thousands of hectares

Mha: millions of hectares

mql: thousands of quintals (100 kg)

Mql: millions of quintals (100 kg)

mhl: thousands of hectolitres

Mhl: millions of hectolitres

MI: millions of litres

l/hbt: litres per habitant

M€: millions of euros

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# Foreword



The annual statistics report aim is to provide numerical facts and information to a worldwide growing vitiviniculture market. Each year, the report analyzes the cases of growth in the vine and wine sectors. This annual statistics reports provides data on the world's vitiviniculture situation in the year 2012. It aims at bringing a better approach to provide a general and extensive knowledge about the vitiviniculture sector. 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 2012 report includes sections on:

- I. Potential Wine production: the area under vines
- II. Global grape production
- III. Wine production
- IV. Wine consumption
- V. Focus on wine trade

## **Main trend:**

This report shows a decrease in the total worldwide area under vines in 2012. **World vineyards reached** a total area surface (including areas not yet in production or harvested) of **7,528 mha**. Although there may be a decline in area surface between 2011 and 2012, it is nonetheless at a slower rate of decline than during the previous years.

**Wine production** in 2012 was relatively low compared to that of 2011. It declined by 10% reaching the **252 Mhl** of wine produced.

2012 estimates of **wine consumption (243 Mhl)** show a somewhat stable level although there is significant decrease in consumption levels in some countries.

Lower supply and higher prices for wine affect more intensively the cheapest product.

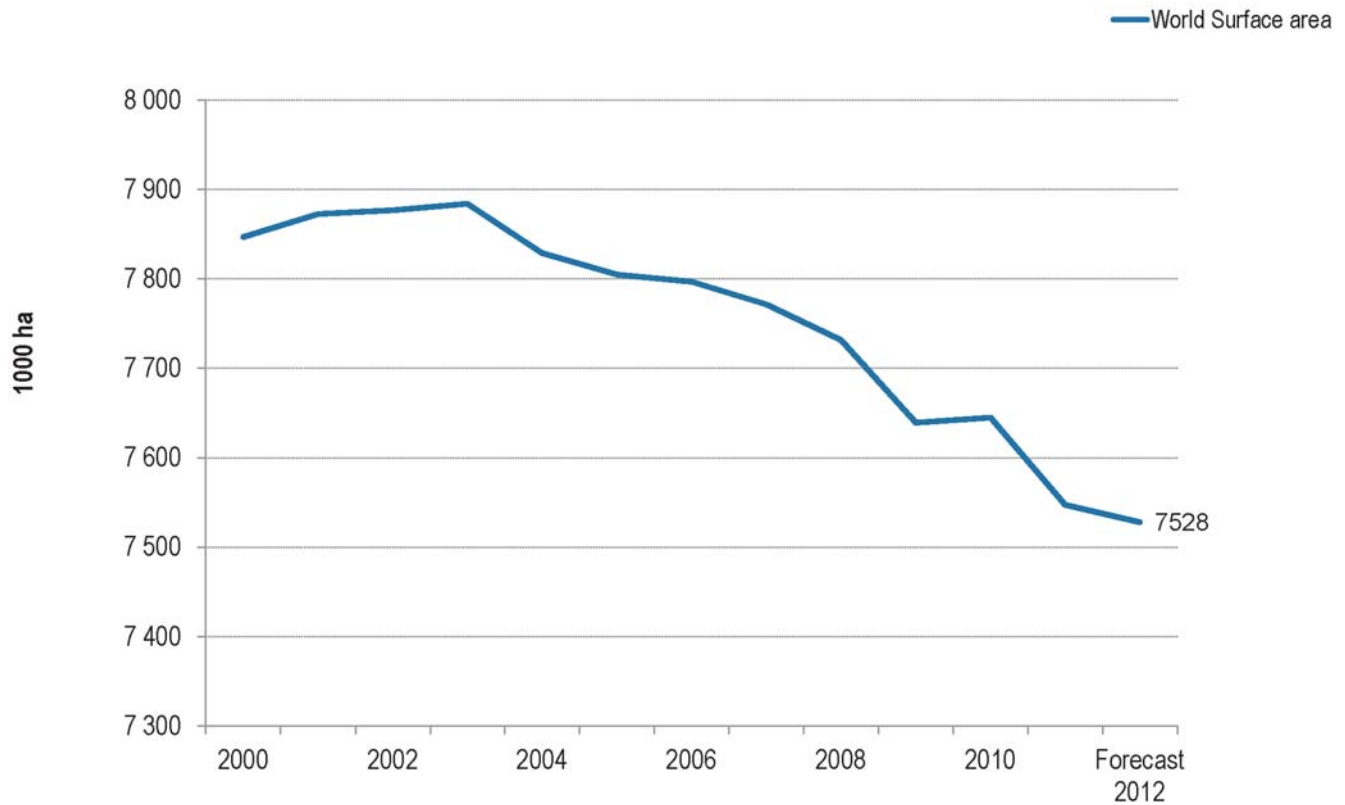


# I. Surface

- Surface area of world vineyards
- European vineyards
- Asian vineyards
- Southern Hemisphere and USA vineyards
- Surface under vines in 2012

# World vineyards

## Trends 2000-2012



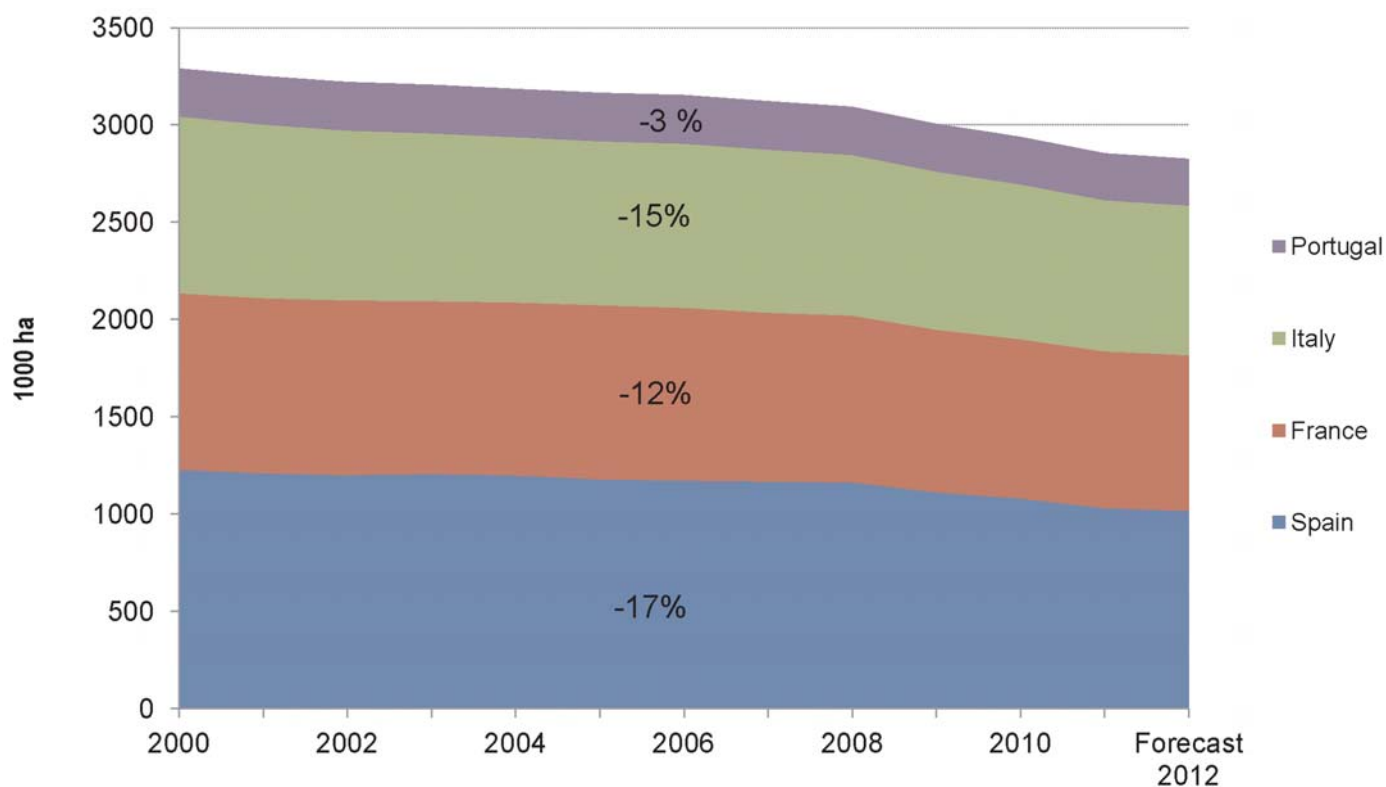
Year	1000 ha
2012*	7528
2011	7547
2010	7645
2009	7639
2008	7732
2007	7772
2006	7797
2005	7805
2004	7829
2003	7884
2002	7877
2001	7873
2000	7847

Source: OIV 

\* Forecast

# European vineyards

Trends 2000-2012



mha	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012*
Spain	1229	1211	1202	1207	1200	1180	1174	1169	1165	1113	1082	1032	1018
France	907	900	898	888	889	895	888	867	857	836	818	806	800
Italy	908	892	872	862	849	842	843	838	825	812	795	776	769
Portugal	246	248	249	249	247	248	249	248	246	244	243	240	239
<b>TOTAL</b>	<b>3290</b>	<b>3251</b>	<b>3221</b>	<b>3206</b>	<b>3185</b>	<b>3165</b>	<b>3154</b>	<b>3122</b>	<b>3093</b>	<b>3005</b>	<b>2938</b>	<b>2854</b>	<b>2826</b>

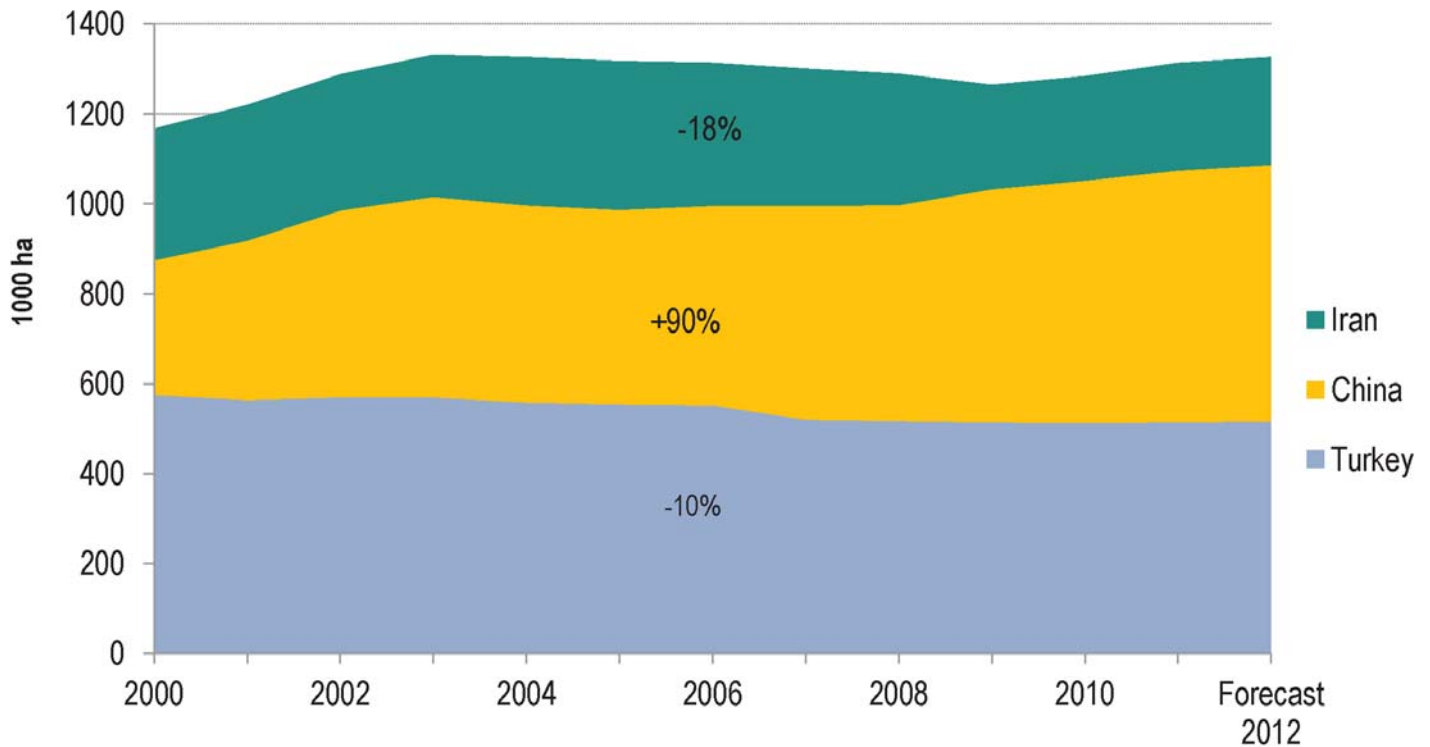
\* Forecast

Source: OIV 




# Asian vineyards

## Trends 2000-2012



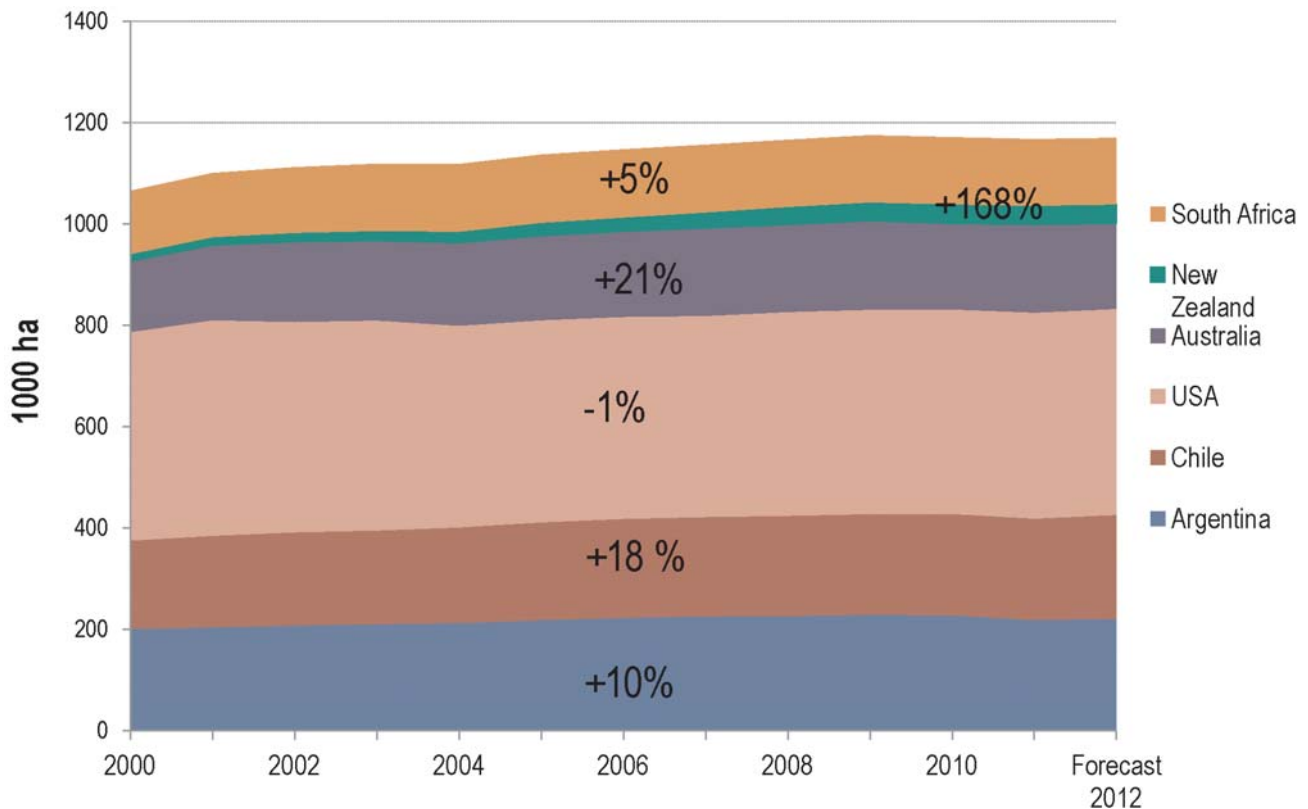
mha	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012*
Turkey	575	564	570	570	559	555	552	521	518	515	514	515	517
China	300	354	416	446	438	433	444	475	480	518	539	560	570
Iran	292	301	302	315	329	330	318	305	292	232	232	239	239
<b>TOTAL</b>	<b>1167</b>	<b>1220</b>	<b>1288</b>	<b>1331</b>	<b>1326</b>	<b>1318</b>	<b>1314</b>	<b>1301</b>	<b>1289</b>	<b>1265</b>	<b>1284</b>	<b>1314</b>	<b>1326</b>

\* Forecast

Source: OIV 

# Southern Hemisphere and USA

Trends 2000-2012



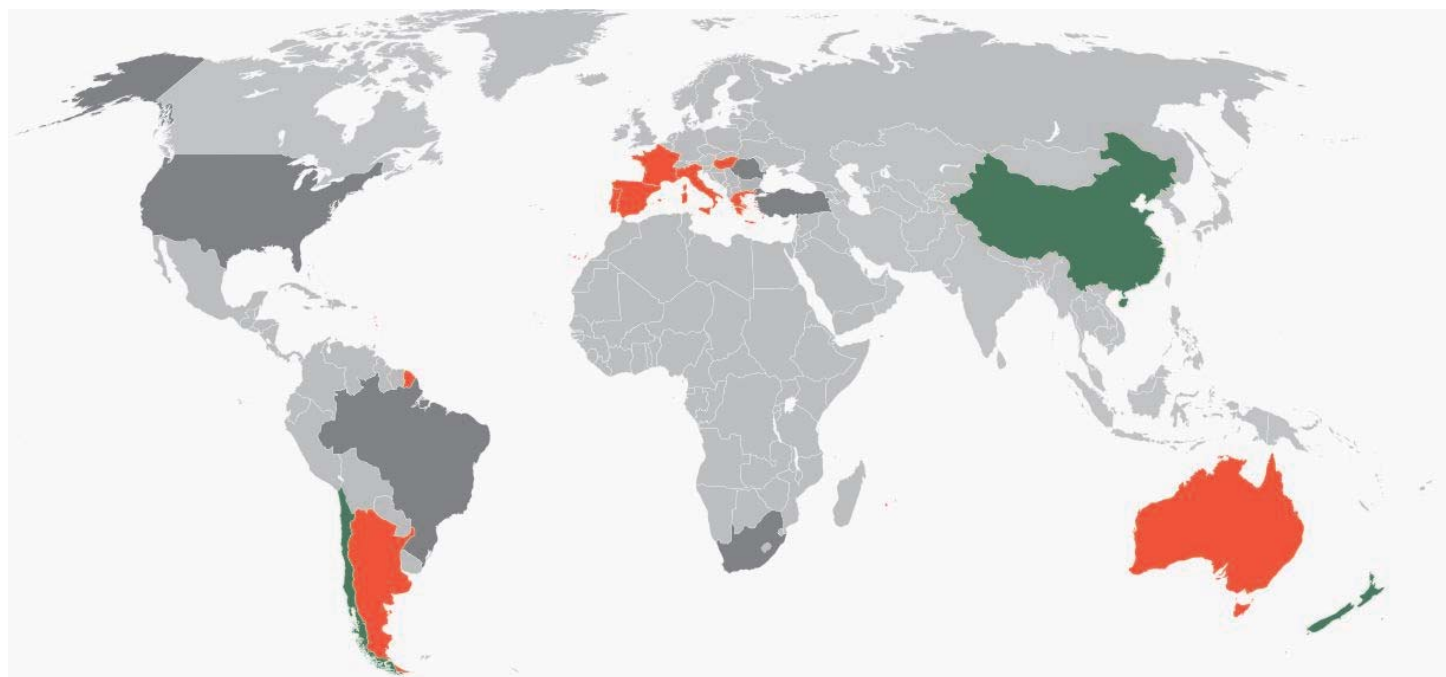
mha	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012*
Argentine	201	204	208	211	213	219	223	226	226	229	228	218	221
Chile	174	181	184	185	189	193	195	196	198	199	200	200	205
USA	412	426	415	415	398	399	399	397	402	403	404	407	407
Australie	140	148	159	157	164	167	169	174	173	176	170	174	169
New Zeland	14	15	17	19	21	25	27	30	35	36	37	37	37
South Africa	124	126	129	132	133	134	134	133	132	132	132	131	131
<b>TOTAL</b>	<b>1065</b>	<b>1100</b>	<b>1112</b>	<b>1119</b>	<b>1118</b>	<b>1137</b>	<b>1147</b>	<b>1156</b>	<b>1166</b>	<b>1175</b>	<b>1171</b>	<b>1168</b>	<b>1170</b>

\* Forecast

Source: OIV 

# Surface under vines in 2012

Evolution 2008/2012



	Country	mha	Growth rate 2008/2012
■ Increase	Argentina	221	-2%
■ Stable	Australia	169	-2%
■ Decrease	Brazil	91	-1%
	Chile	205	4%
	China	570	19%
	France	800	-7%
	Greece	110	-4%
	Hungary	64	-11%
	Italy	769	-7%
	New Zealand	37	7%
	Portugal	239	-3%
	Romania	205	-1%
	South Africa	131	-1%
	Spain	1018	-13%
	Turkey	517	1%
	USA	407	1%

Source: OIV 



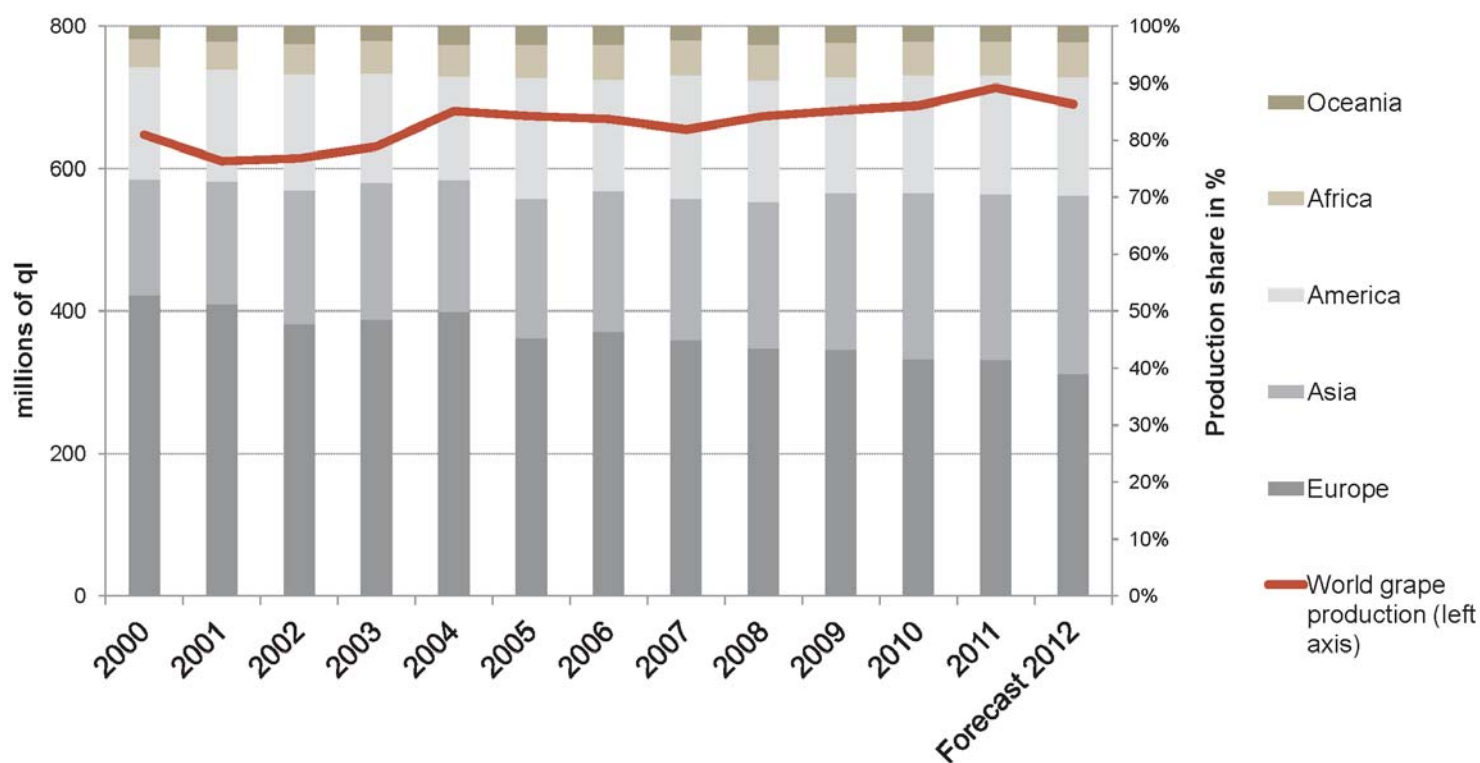
## II. Grape

- Global grapes production & yield

- Development of total grapes production
- Yield

# Development of total grapes production

## World production



Year	Mqj
2012*	691
2011	714
2010	688
2009	682
2008	674
2007	655
2006	670
2005	674
2004	681
2003	631
2002	615
2001	611
2000	648

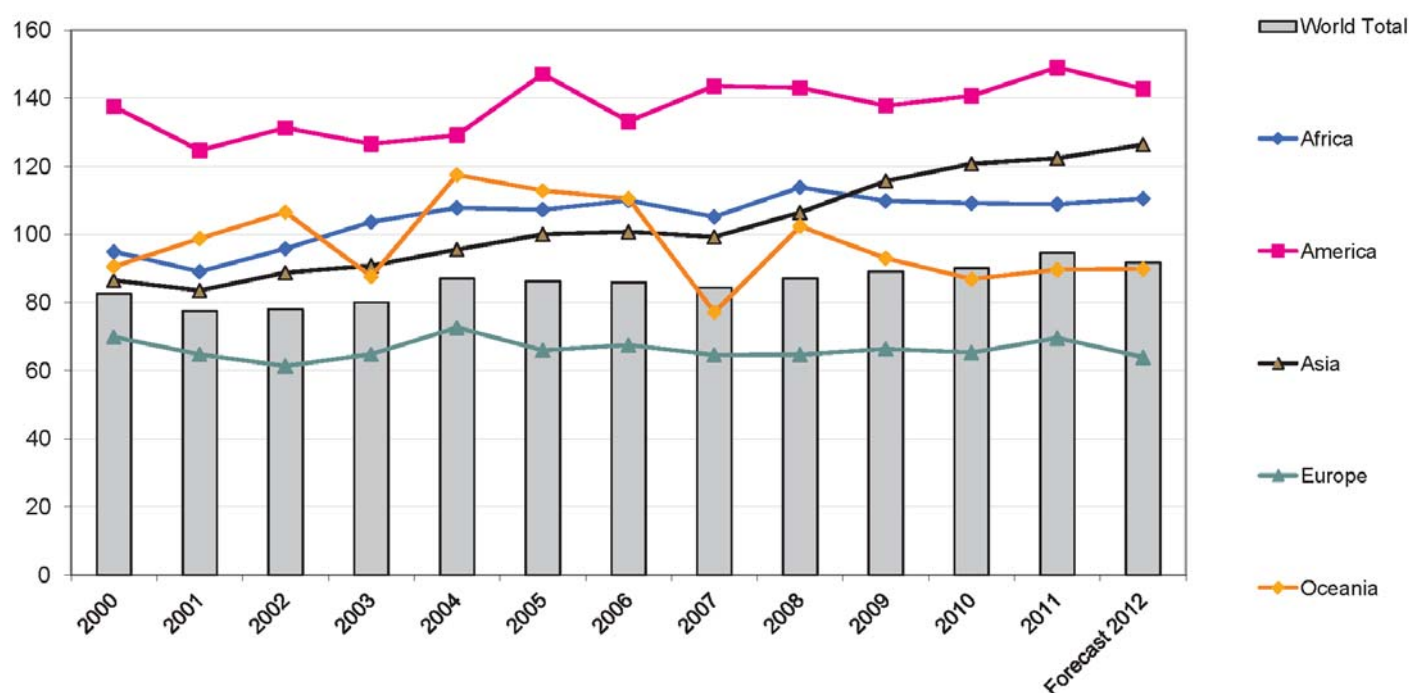
\* Forecast

Source: OIV 

# Yield evolution

Total grapes/total area including vines not in production yet

q/ha



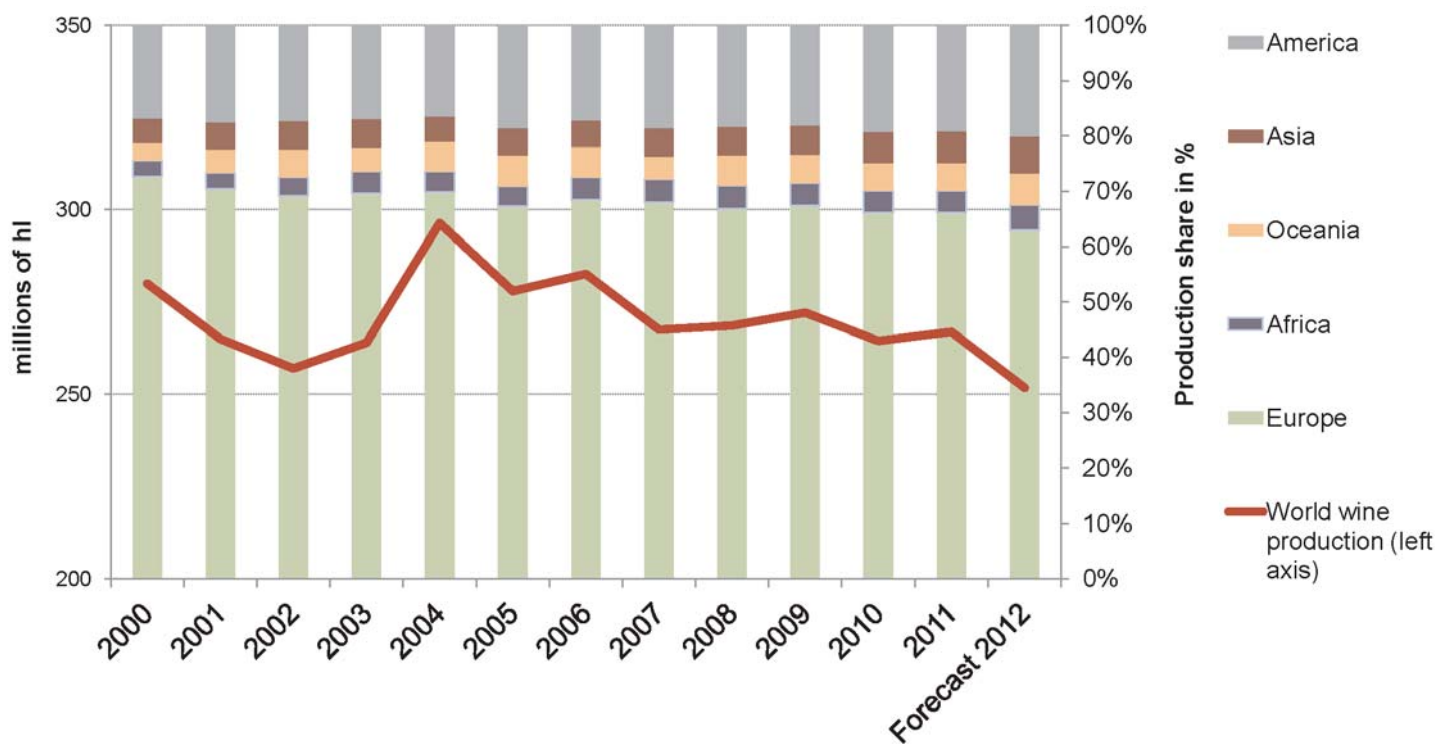
Source: OIV 



## III. Wine

- Global wine production
- Major wine producers
- Global wine consumption
- Major wine consumers
- Individual human consumption of wine per year

# Global wine production



Year	Mhl
2012*	252
2011	267
2010	264
2009	272
2008	269
2007	268
2006	283
2005	278
2004	296
2003	264
2002	257
2001	265
2000	280

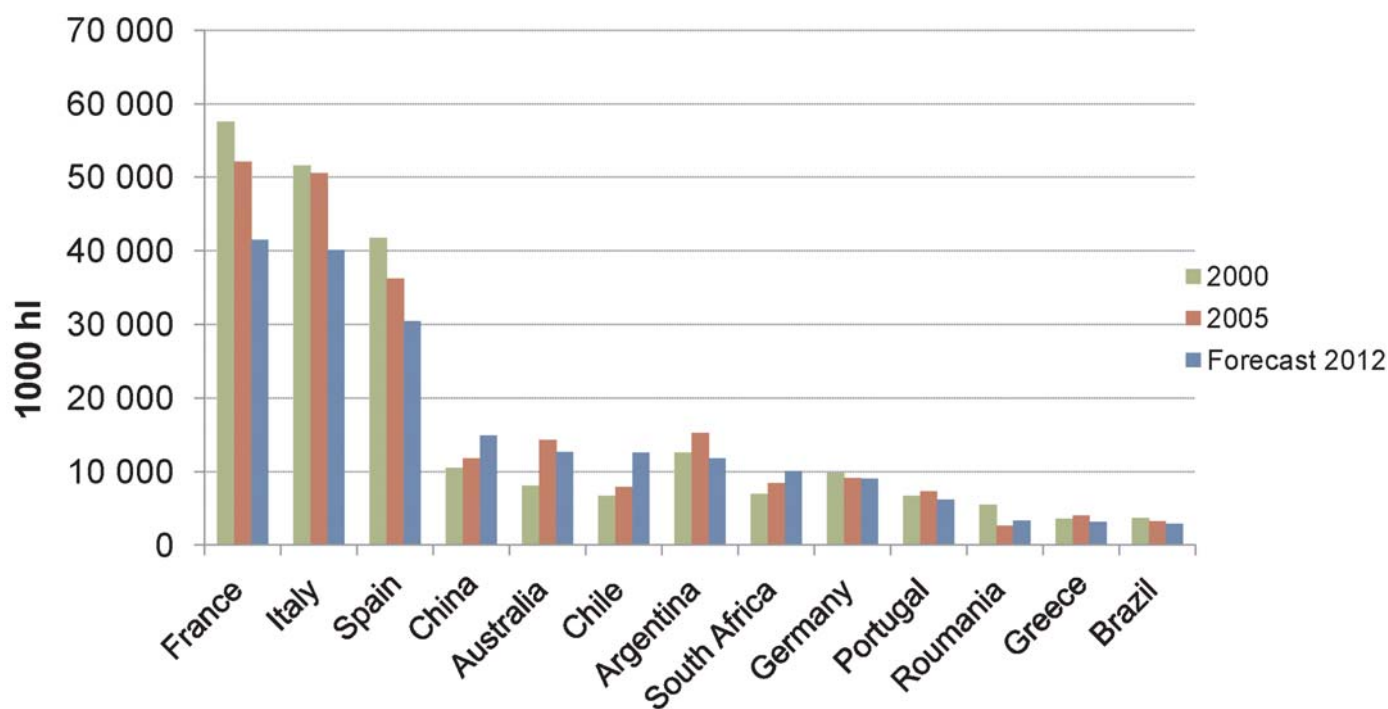
\* Forecast

Source: OIV 



# Major wine producers

Trends 2000-2012



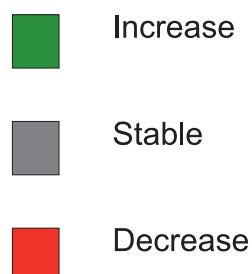
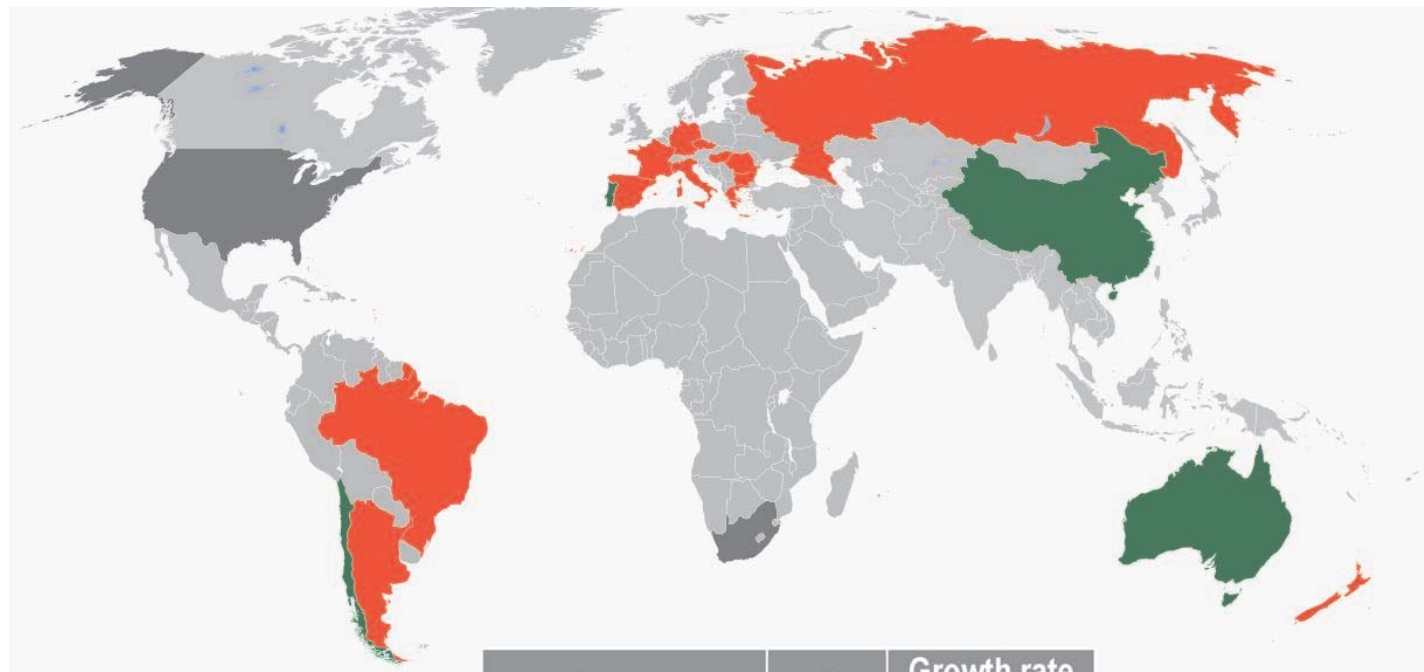
mhl	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012*	Change in % 2000-2012
France	57 541	53 389	50 353	46 360	57 386	52 105	52 127	45 672	42 654	46 269	44 322	50 757	41 422	-28%
Italy	51 620	49 865	42 507	41 807	49 935	50 566	52 036	45 981	46 970	47 314	48 525	42 772	40 060	-22%
Spain	41 692	30 500	33 478	41 843	42 988	36 158	38 273	36 408	35 913	36 093	35 353	33 397	30 392	-27%
China	10 500	10 800	11 200	11 600	11 700	11 800	11 900	12 500	12 600	12 800	13 000	13 200	14 880	42%
Australia	8 064	10 731	12 168	10 835	14 679	14 301	14 263	9 620	12 448	11 784	11 420	11 180	12 660	57%
Chile	6 674	5 452	5 623	6 682	6 301	7 885	8 448	8 227	8 683	10 093	8 844	10 464	12 554	88%
Argentina	12 537	15 835	12 695	13 225	15 464	15 222	15 396	15 046	14 676	12 135	16 250	15 473	11 778	-6%
South Africa	6 949	6 471	7 189	8 853	9 279	8 406	9 398	9 783	10 165	9 986	9 327	9 324	10 037	44%
Germany	9 852	8 891	9 885	8 191	10 007	9 153	8 916	10 261	9 991	9 228	6 906	9 132	9 012	-9%
Portugal	6 710	7 789	6 677	7 340	7 481	7 266	7 542	6 074	5 689	5 868	7 133	5 610	6 141	-8%
Romania	5 456	5 090	5 461	5 555	6 166	2 602	5 014	5 289	5 159	6 703	3 287	4 058	3 311	-39%
Greece	3 558	3 477	3 085	3 799	4 248	4 027	3 938	3 511	3 869	3 366	2 950	2 750	3 150	-11%
Brazil	3 638	2 968	3 212	2 620	3 925	3 199	2 372	3 502	3 683	2 720	2 459	3 394	2 917	-20%
World Total	280	266	257	264	296	278	283	268	269	272	264	267	252	-10%

\* Forecast

Source: OIV 

# Wine production in 2012

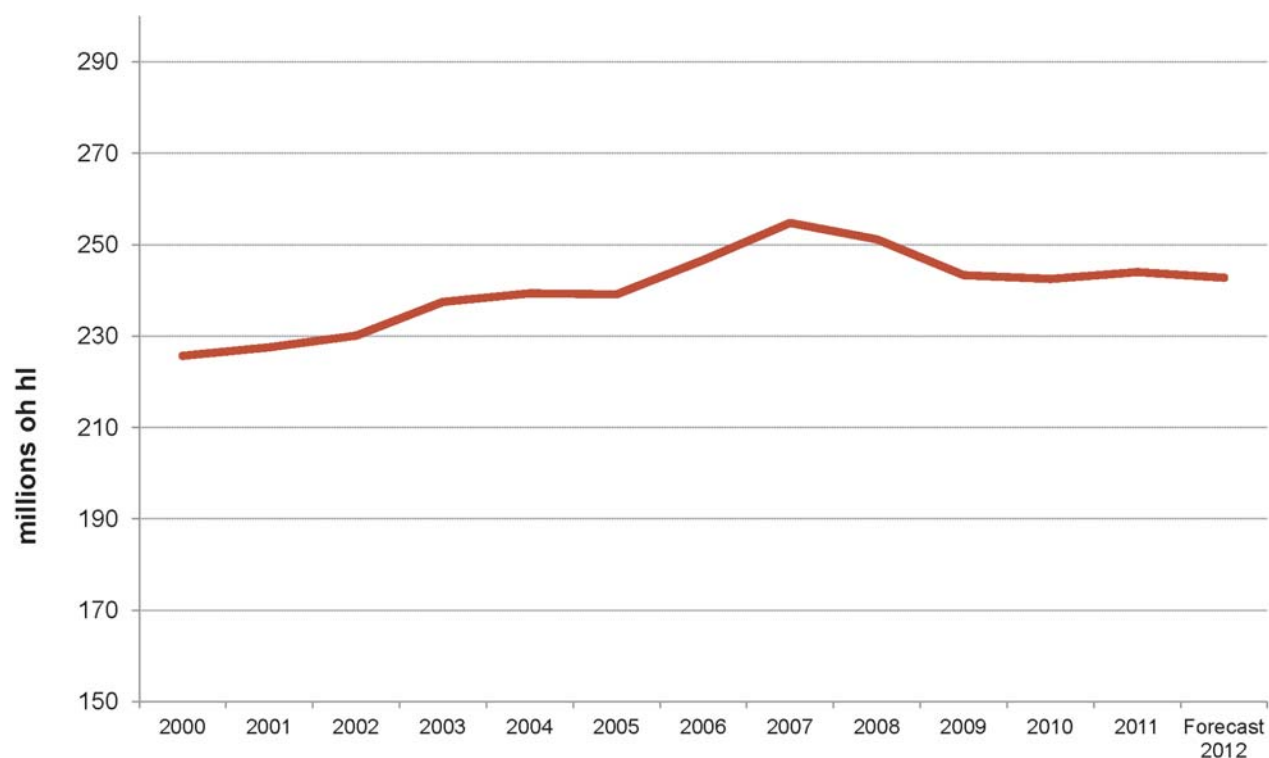
Evolution 2008/2012



Country	mhl	Growth rate 2008/2012
Argentina	11778	-20%
Australia	12660	2%
Brazil	2917	-21%
Bulgaria	1337	-17%
Chile	12554	45%
China	14880	18%
Czech Rep.	470	-44%
France	41422	-3%
Germany	9012	-10%
Greece	3150	-19%
Hungary	1874	-46%
Italy	40060	-15%
New Zealand	1940	-5%
Portugal	6141	8%
Romania	3311	-36%
Russian Feder.	6400	-10%
Spain	30392	-15%
South Africa	10037	-1%
USA	515	-1%

Source: OIV 

# Global wine consumption



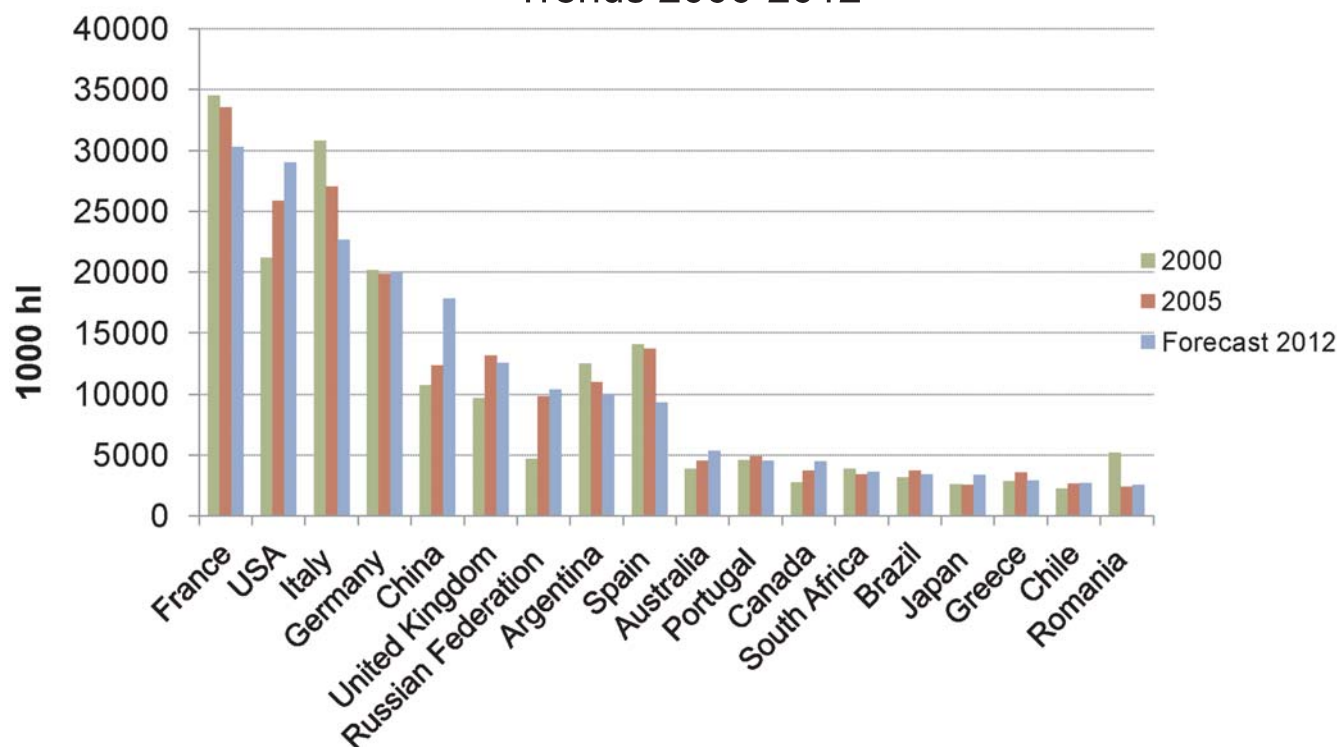
Year	Mhl
2012*	243
2011	244
2010	242
2009	243
2008	251
2007	255
2006	247
2005	239
2004	239
2003	237
2002	230
2001	228
2000	226

\* Forecast

Source: OIV 

# Major wine consumers

## Trends 2000-2012



mhl	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012*	Change in % 2000-2012
France	34 500	33 919	34 820	34 081	33 218	33 530	33 003	32 169	30 800	30 215	29 272	29 322	30 269	-12%
USA	21 200	21 250	22 538	23 801	24 750	25 850	26 700	27 850	27 700	27 250	27 600	28 425	29 000	37%
Italy	30 800	30 150	27 709	29 343	28 300	27 016	27 332	26 700	26 166	24 100	24 624	23 052	22 633	-27%
Germany	20 150	20 044	20 272	19 735	19 845	19 848	20 210	20 782	20 747	20 224	20 200	19 707	20 000	-1%
China	10 695	10 952	11 364	11 993	12 120	12 306	13 012	13 884	14 046	14 514	15 180	16 339	17 817	67%
UK	9 696	10 336	11 222	11 584	12 742	13 143	12 672	13 702	13 483	12 680	12 900	12 860	12 533	29%
Russian Fed.	4 699	6 067	6 404	8 682	9 159	9 809	11 251	12 690	11 840	10 368	12 197	11 276	10 394	121%
Argentina	12 491	12 036	11 988	12 338	11 113	10 972	11 103	11 166	10 677	10 342	9 753	9 809	10 051	-20%
Spain	14 046	14 238	13 960	13 798	13 898	13 686	13 514	13 100	12 168	11 271	10 896	9 894	9 300	-34%
Australia	3 899	3 976	4 007	4 196	4 361	4 523	4 567	4 903	4 932	5 120	5 351	5 325	5 375	38%
Portugal	4 595	4 697	4 651	5 315	4 913	4 900	4 793	4 523	4 539	4 515	4 690	4 550	4 550	-1%
Canada	2 756	2 800	2 884	3 440	3 607	3 719	3 957	4 018	4 044	4 121	4 339	4 255	4 476	62%
South Africa	3 892	3 903	3 879	3 461	3 478	3 401	3 407	3 557	3 558	3 384	3 463	3 527	3 616	-7%
Brazil	3 177	3 079	3 178	3 077	3 177	3 710	3 466	3 254	3 265	3 508	3 686	3 805	3 399	7%
Japan	2 626	2 788	2 784	2 544	2 523	2 532	2 557	2 293	2 374	2 533	2 687	2 870	3 360	28%
Greece	2 861	2 947	2 466	3 072	3 300	3 586	3 200	3 300	3 200	3 029	3 248	2 852	2 923	2%
Chile	2 271	2 250	2 297	2 552	2 547	2 644	2 380	2 980	2 339	3 118	3 237	3 008	2 707	19%
Romania	5 215	4 705	4 964	5 050	5 800	2 379	5 546	5 529	5 404	4 035	1 626	3 516	2 582	-50%
World Total	226	228	230	237	239	239	247	255	251	243	242	244	243	8%

Source: OIV 

\* Forecast

# Individual human consumption

l per capita per year*	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012*
Luxembourg	62,1	58,2	64,0	56,7	58,3	55,6	55,2	50,6	54,6	51,8	53,5	49,8	50,7
France	58,4	57,1	58,3	56,6	54,8	55,0	53,8	52,1	49,6	48,4	46,6	46,4	47,7
Portugal	44,5	45,3	44,6	50,8	46,8	46,5	45,3	42,6	42,7	42,4	43,9	42,6	42,5
Italy	54,0	52,7	48,2	50,7	48,6	46,0	46,3	44,9	43,7	40,0	40,7	37,9	37,1
Croatie	40,2	42,3	45,6	39,2	37,0	29,4	30,1	33,7	31,5	34,1	35,4	34,5	34,4
Slovenia	34,4	30,2	23,2	33,0	25,4	32,0	26,8	34,1	39,6	37,1	37,5	37,3	33,1
Denmark	33,7	34,5	33,5	33,8	31,7	31,9	31,6	32,9	33,8	34,2	34,1	33,0	32,6
Austria	30,9	28,5	29,7	29,3	29,3	29,2	29,6	29,5	28,8	28,7	28,6	30,3	29,7
Belgium	24,4	23,5	26,6	25,4	26,5	26,8	27,7	27,5	28,2	26,7	25,8	27,1	27,8
Greece	26,0	26,7	22,3	27,6	29,6	32,1	28,5	29,3	28,3	26,7	28,6	25,0	25,6
Argentina	33,8	32,3	31,8	32,5	29,0	28,4	28,5	28,4	26,9	25,8	24,1	24,1	24,4
Germany	24,5	24,3	24,6	23,9	24,0	24,0	24,5	25,2	25,2	24,5	24,5	24,0	24,4
Australia	20,3	20,5	20,4	21,1	21,7	22,2	22,0	23,2	22,9	23,4	24,0	23,6	23,5
Netherland	19,5	20,9	20,8	22,1	20,6	21,3	21,4	22,2	22,4	22,0	23,1	22,7	22,8
Hungary	30,9	31,4	34,0	30,8	30,5	26,2	28,7	28,1	30,2	26,1	18,1	21,9	21,1
Sweden	13,3	14,9	16,5	16,8	14,7	17,0	16,1	19,3	21,7	21,6	21,4	21,2	21,1
Spain	34,9	34,9	33,7	32,8	32,5	31,5	30,7	29,4	27,0	24,7	23,6	21,3	19,9
UK	16,4	17,4	18,8	19,4	21,2	21,7	20,9	22,4	21,9	20,5	20,7	20,5	19,9
Ireland	11,0	12,2	12,6	14,5	13,8	16,4	16,8	17,1	17,3	15,3	16,2	17,1	17,5
Czech Republic	6,6	8,8	10,6	11,5	8,0	10,8	12,7	17,2	19,0	19,2	19,1	19,0	17,4
Chile	14,7	14,4	14,6	16,0	15,8	16,2	14,5	17,9	13,9	18,4	18,9	17,4	15,5
USA	7,5	7,4	7,8	8,2	8,4	8,7	8,9	9,2	9,1	8,9	8,9	9,1	9,2
Russian Fed.	3,2	4,2	4,4	6,0	6,3	6,8	7,8	8,9	8,3	7,2	8,5	7,9	7,3

\* Base total world population

Source: OIV 

## IV. Focus on wine trade\*

- Past and recent evolution of wine trade, in volume and value
- Structure and evolution of wine trade by major categories of wine
- Evolution of major wine exporters
- Evolution of major wine importers

\*In collaboration with the Spanish Observatory of Wine Markets (OeMV).

# Evolution of wine trade in volume and value

World wine trade in Euros and Litres



Source: GTA, OIV, OeMv

# Structure and evolution of wine trade by major categories of wine

World wine trade by type of product  
Estimations of the 11 major exporters

Million €	2011	2012	Variation (M€)	Variation %
Sparkling	3 521.7	3 761.0	239.3	6.8%
Bottled	15 114.2	16 230.0	1 115.8	7.4%
Bulk	2 146.7	2 537.4	390.7	18.2%
Must	90.6	85.5	-5.1	-5.6%
<b>Total wine</b>	<b>20 873.2</b>	<b>22 613.9</b>	<b>1 740.7</b>	<b>8.3%</b>

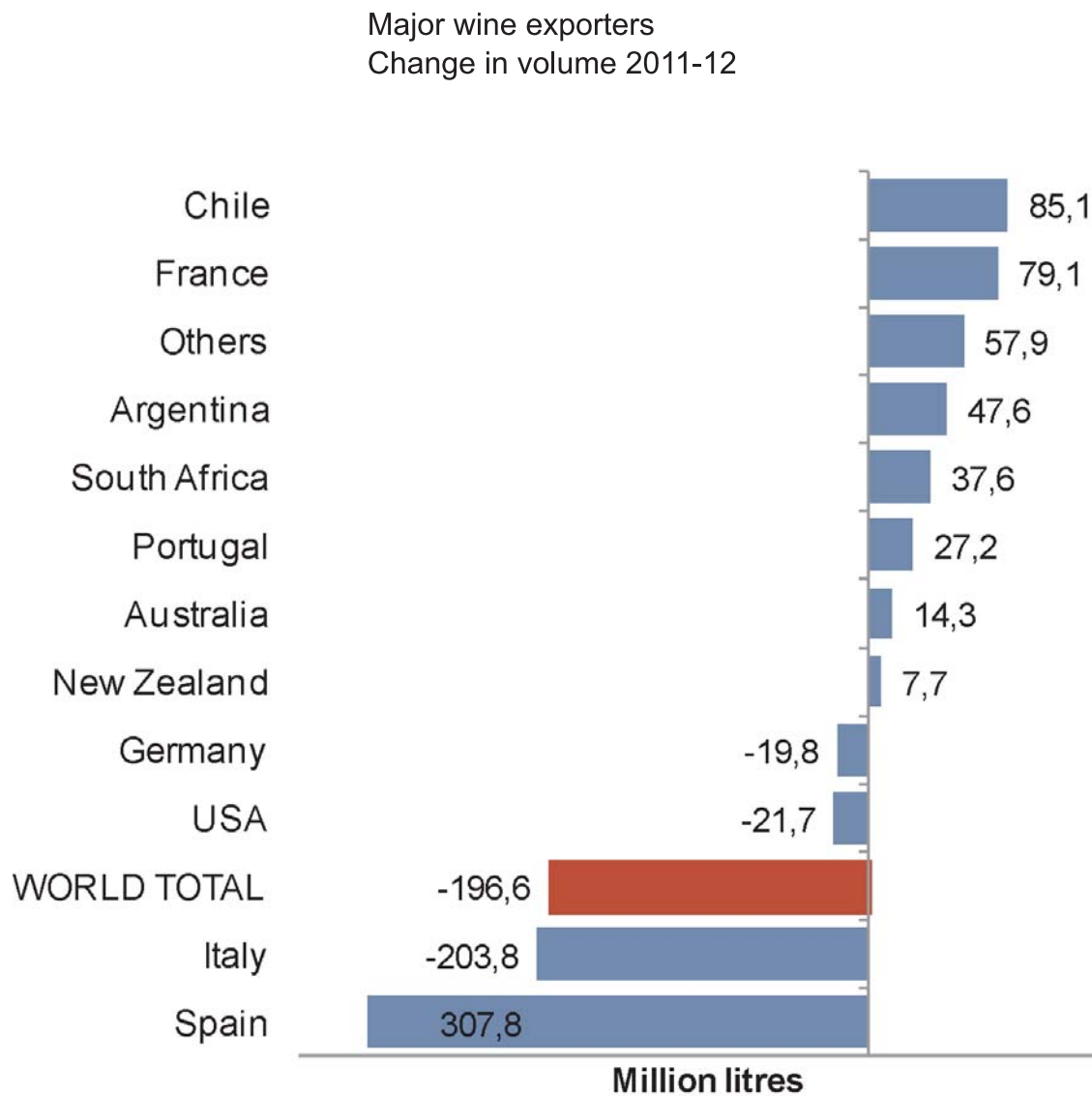
Million l.	2011	2012	Variation (MI.)	Variation %
Sparkling	565.3	571.1	5.8	1.0%
Bottled	5 101.8	5 038.5	-63.3	-1.2%
Bulk	3 610.1	3 458.4	-151.7	-4.2%
Must	114.4	74.9	-39.5	-34.5%
<b>Total wine</b>	<b>9 391.6</b>	<b>9 142.9</b>	<b>-248.7</b>	<b>-2.6%</b>

€/l.	2011	2012	Variation (€)	Variation %
Sparkling	6.23	6.59	0.36	5.7%
Bottled	2.96	3.22	0.26	8.7%
Bulk	0.59	0.73	0.14	23.4%
Must	0.79	1.14	0.35	44.1%
<b>Total wine</b>	<b>2.22</b>	<b>2.47</b>	<b>0.3</b>	<b>11.3%</b>

Source: GTA; elaborated by OeMv

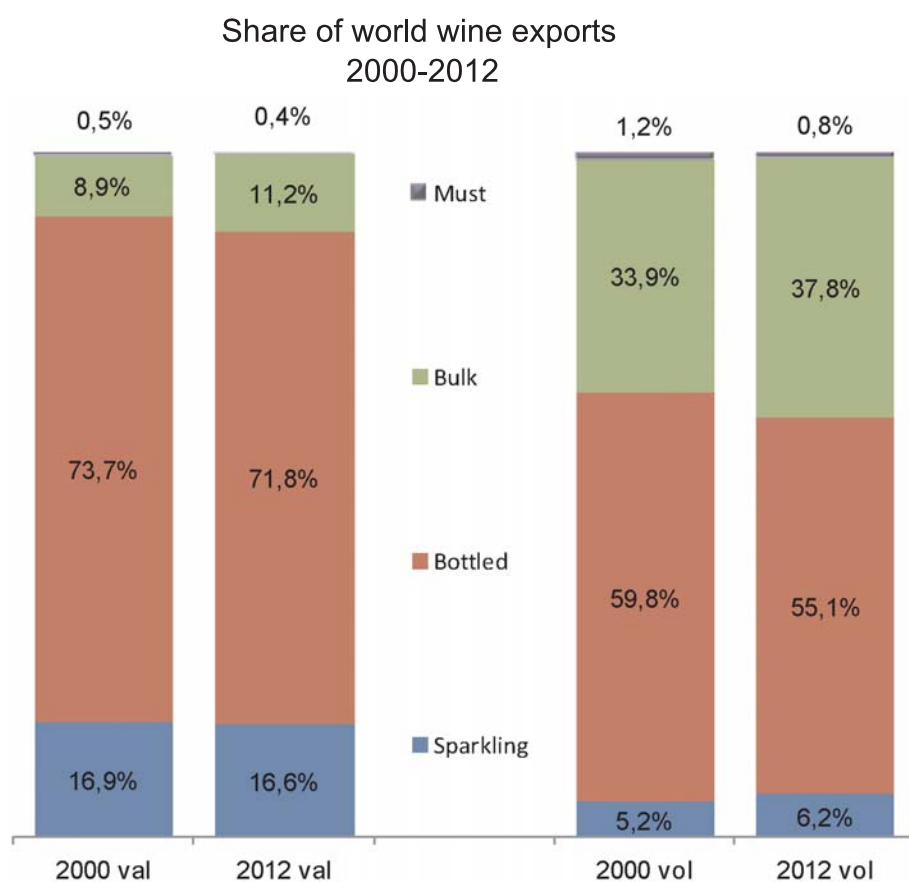


# Evolution of major wine exporters



Source: GTA, OIV, OeMv

## Major evolutions in wine exports since 2000



## Exports of top wine producers - Exports of wine &amp; must

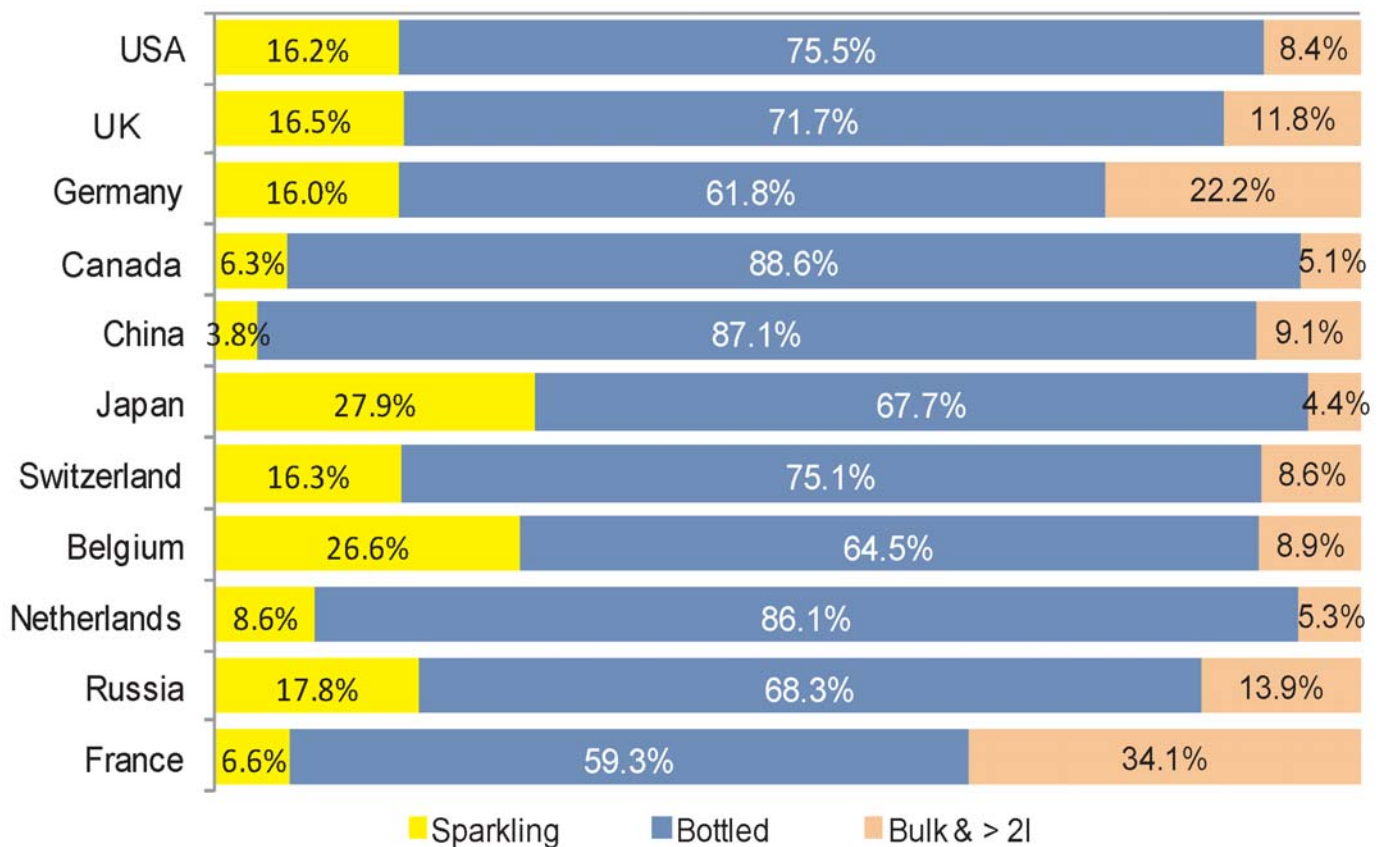
Million €	2000	2012	2000	2012	Variation M€	Variation %
France	5 494.2	7 838.6	10 123	16 568	6 445.1	4.2%
Italy	2 471.8	4 690.6				
Spain	1 256.0	2 359.9				
Germany	394.2	972.0				
Portugal	506.7	706.9				
Australia	976.2	1 523.7	2 725	6 046	3 321.1	6.9%
Chile	633.9	1 399.5				
USA	580.3	1 077.4				
New Zealand	97.1	768.0				
South Africa	264.2	566.1				
Argentina	173.2	711.3				
<b>Top producers</b>	<b>12 847.8</b>	<b>22 614.0</b>	<b>12 848</b>	<b>22 614</b>	<b>9 766.2</b>	<b>4.8%</b>

Source: GTA, OIV, OeMv

# Evolution of major wine imports

## Top wine importers in 2012

Top importers - by type of wine in **value** terms 2012



Source: GTA, OIV, OeMv



**International Organisation  
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