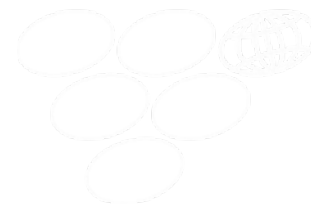




INTERNATIONAL ORGANISATION OF VINE AND WINE

# STATE OF THE WORLD VINE AND WINE SECTOR

Pau Roca  
Director General of the OIV  
OIV Press Conference  
20 April 2023



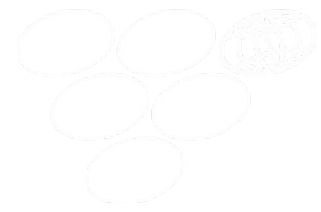
# Topics

State of the world vine and wine sector in 2022

- Vineyard Surface Area
- Wine Production
- Wine Consumption
- International Trade of Wine

First Estimates Southern Hemisphere Wine Production in 2023

Main Wine Sector Challenges: Looking Ahead

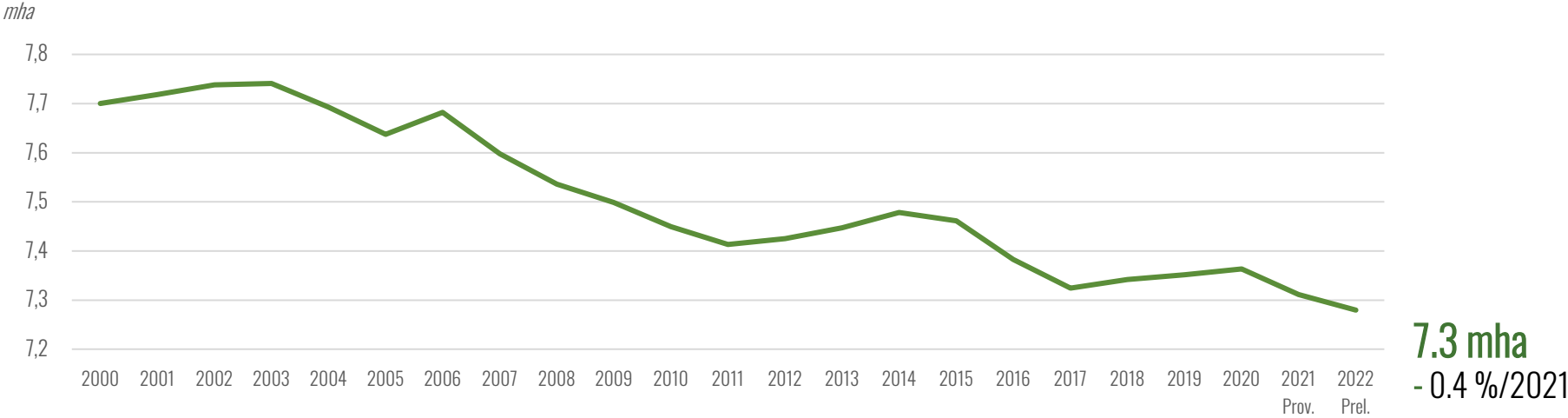


# Vineyard Surface Area



# Vineyard Surface Area

Evolution of world vineyard surface area



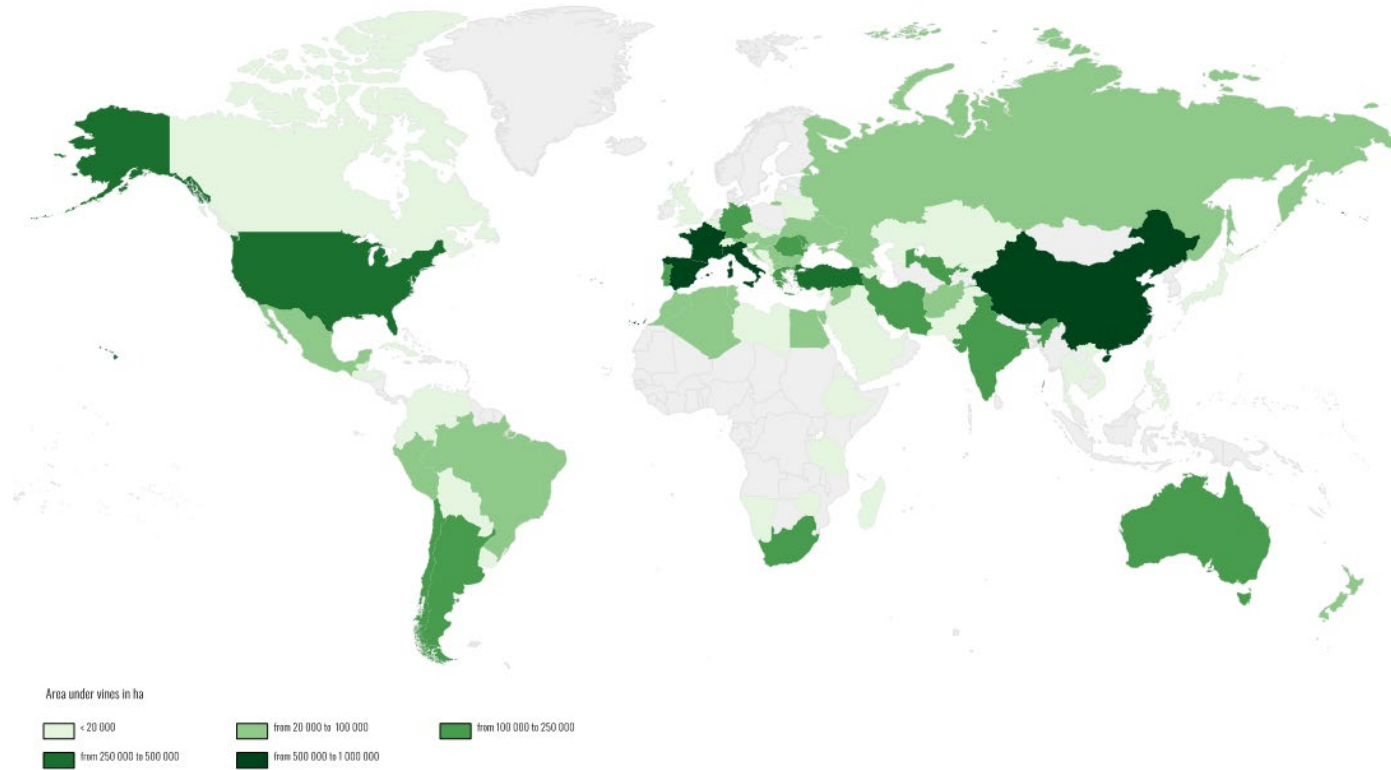
**The world area under vines**, corresponding to the total surface area planted with vines for all purposes (wine, table grapes and raisins), including young vines not yet in production, **is estimated at 7.3 mha in 2022**.

The world vineyard has **stabilised since 2017**, mainly due to the slow down of the Chinese vineyard’s growth and the implementation of the system of new planting authorisation in the **EU**, which stands for the eight consecutive year at **3.3 mha**. The current stabilisation, however, hides **heterogeneous evolutions in different regions of the world**.



# Vineyard Surface Area

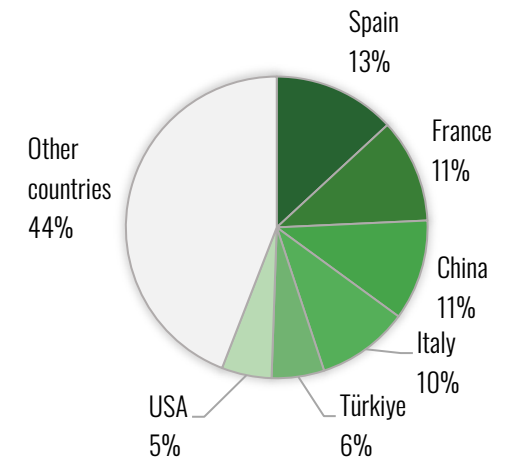
World vineyard distribution in 2022



© OIV

In 2022 there are **93 vine growing countries** at world level. **Top 6 countries** represent **56 %** of the world vineyard surface area.

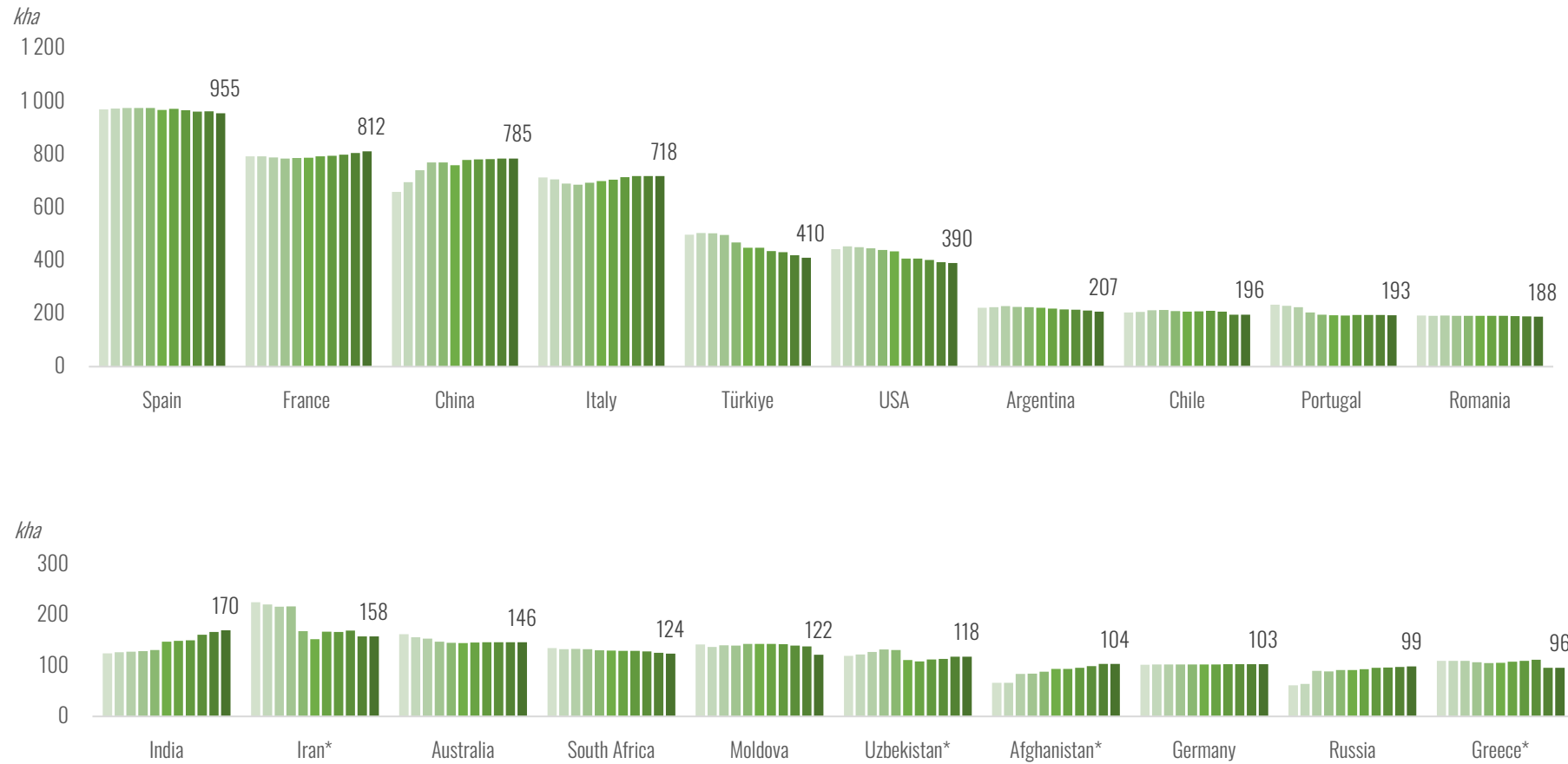
Breakdown of vineyard surface area in 2022



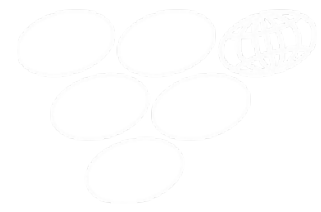


# Vineyard Surface Area

Major vine-growing countries by surface area, 2012-2022



\*Carried over from latest available data

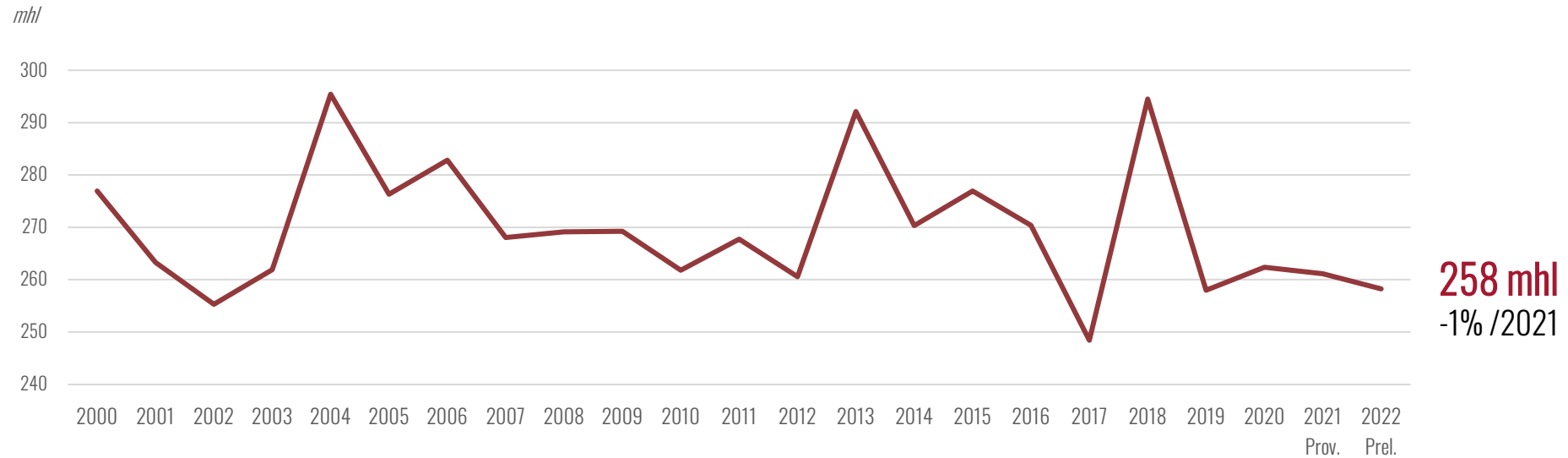


# Wine production



# Wine Production

Evolution of world wine production



**In 2022 world wine production**, excluding juices and musts, is estimated at **258 mhl**, marking a decrease of almost 3 mhl (-1%), compared to 2021. This is due to **higher-than-expected harvest volume in Europe** despite the drought and heat waves during spring and summer, and **average production level recorded in the Southern Hemisphere**.

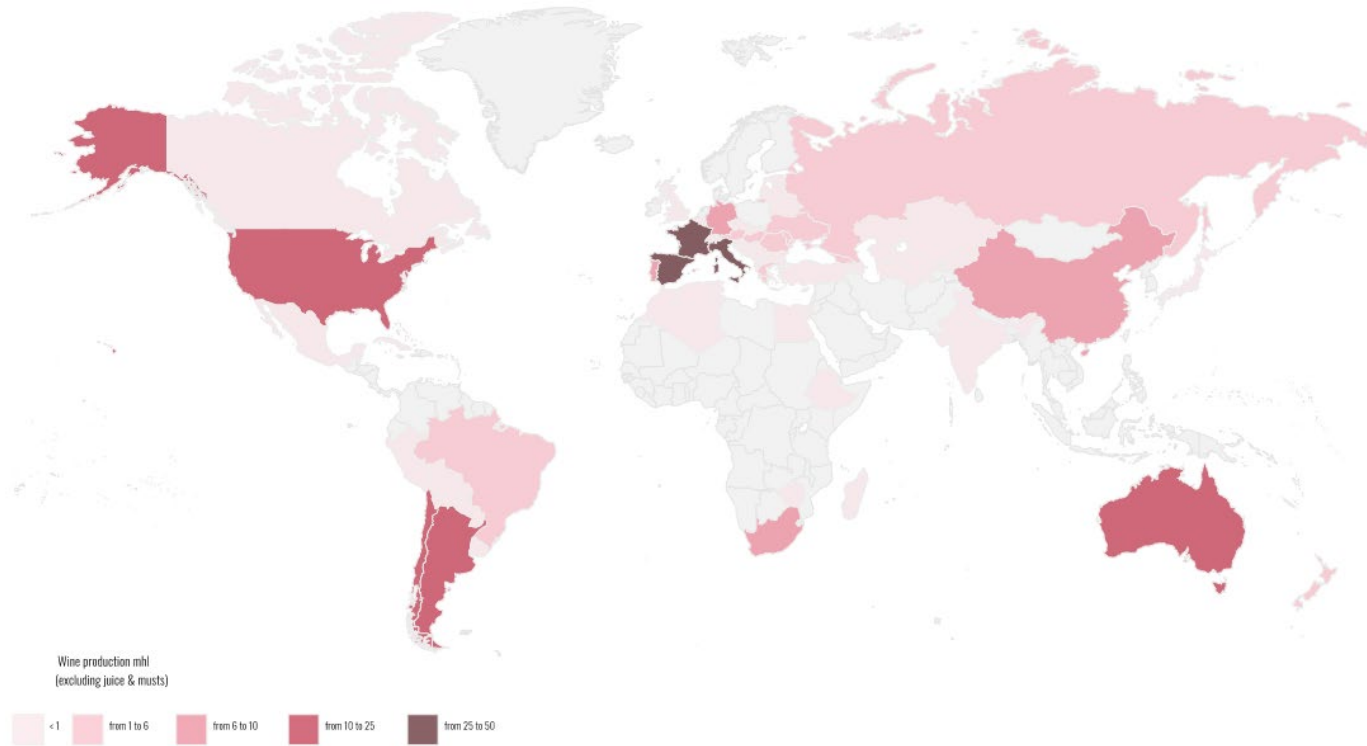
Overall, the 2022 global wine production volume can be considered, for the fourth consecutive year, **slightly below its 20-year average**





# Wine Production

World wine production distribution in 2022



© OIV

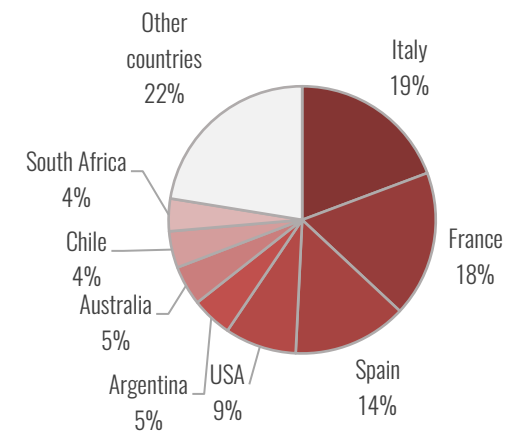
In 2022, there are **85 wine-producing countries** in the world.

Three countries - **Italy, France and Spain** - account for **more than half of the world production**.

**Top 8** wine producing countries account for **78% of the total wine produced** in 2021.

**EU: 161 mhl in 2022 (+4%/2021)**, accounting for 62% of the world total

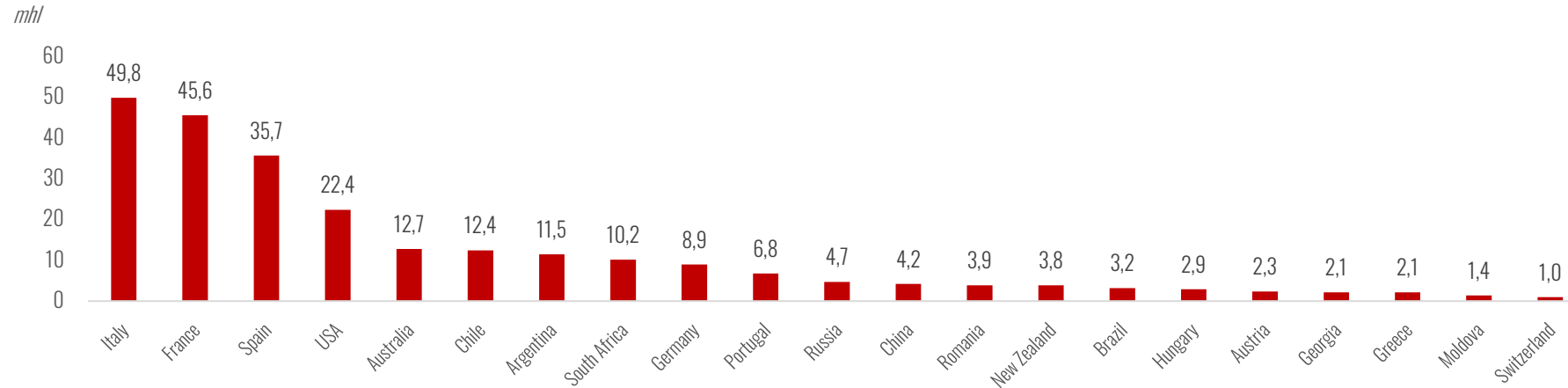
Breakdown of wine production in 2022



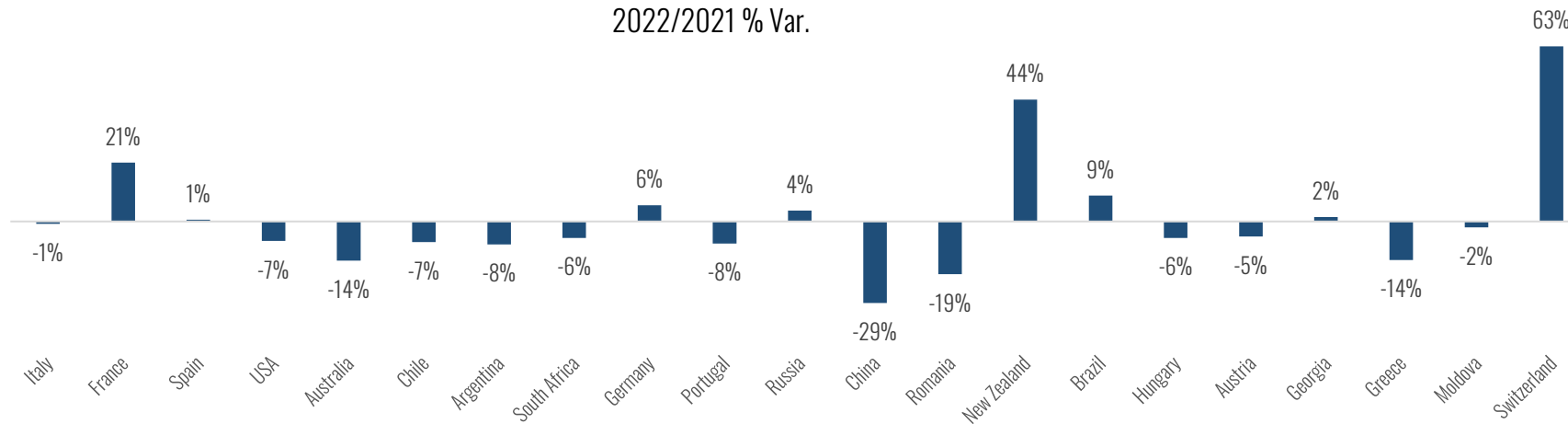


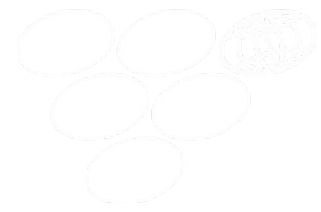
# Wine Production

### Main wine producing countries in 2022



### 2022/2021 % Var.

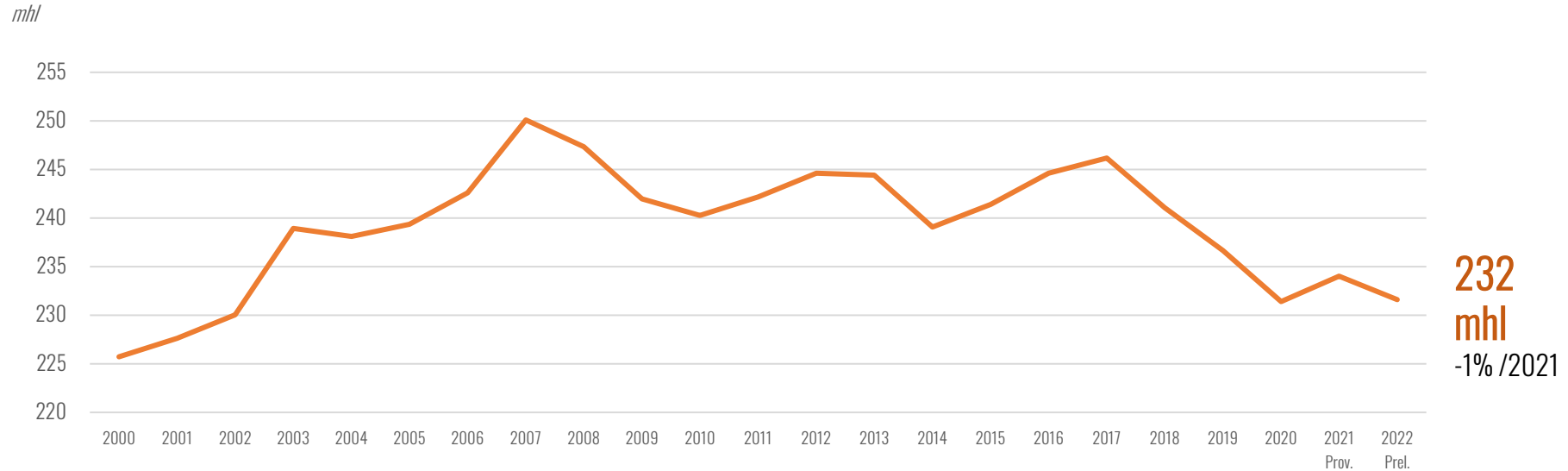




# Wine Consumption



## Evolution of world wine consumption



**World wine consumption in 2022 is estimated at 232 mhl, marking a decrease of 1% compared to 2021.**

The negative trend started in 2018 can be mainly attributed to the **decline in China's consumption**, which has lost on average 2 mhl per year since 2018.

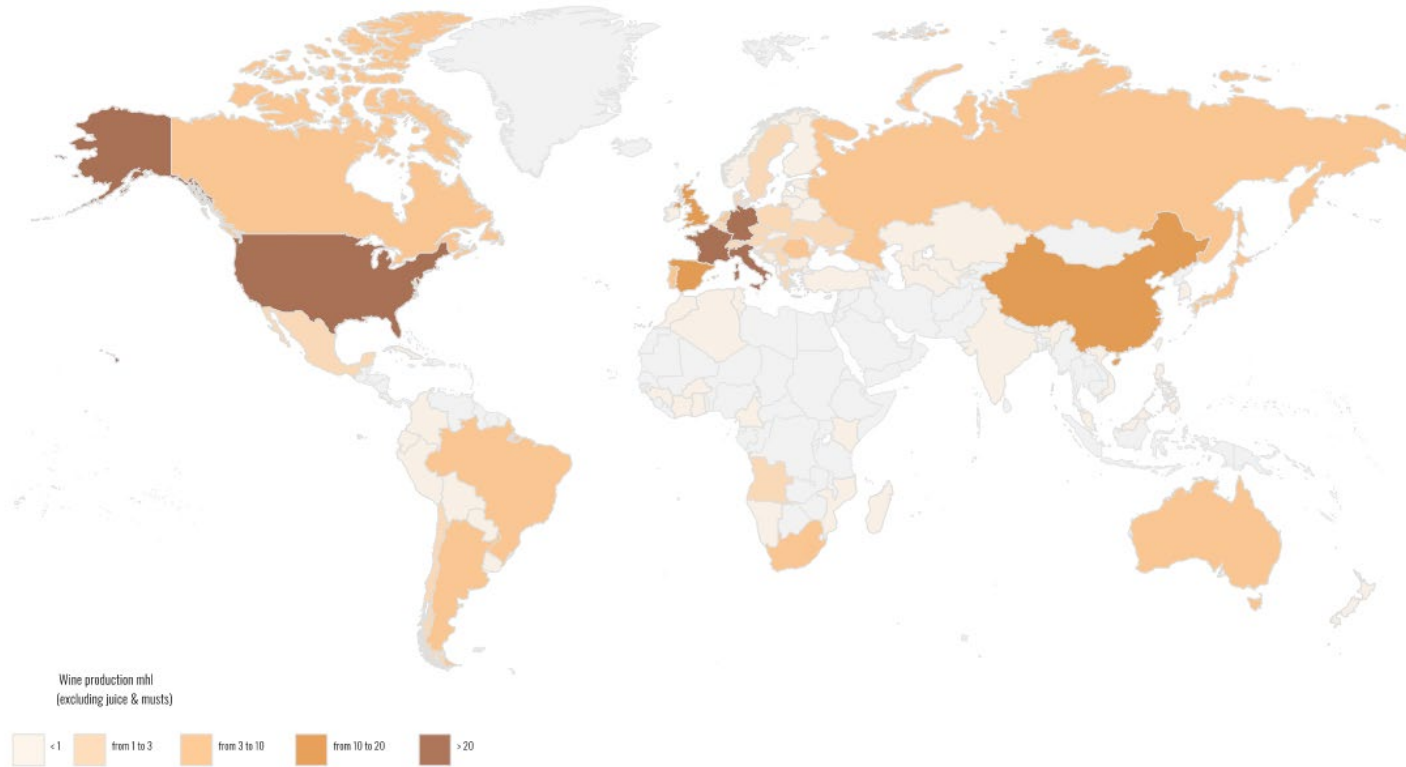
This downward trend was accentuated in 2020 by the **Covid-19 pandemic**, which brought a **depressing effect on many large wine markets**.

In 2022, the **energy crisis** and **disruptions in global supply chains** led to higher production and distribution costs, which resulted in **higher wine prices**, and high levels of **inflation hit the purchasing power of consumers**. In this context, **wine consumption behaviours at country level are quite heterogenous** across geographical regions.



# Wine Consumption

World wine consumption distribution in 2022



© OIV

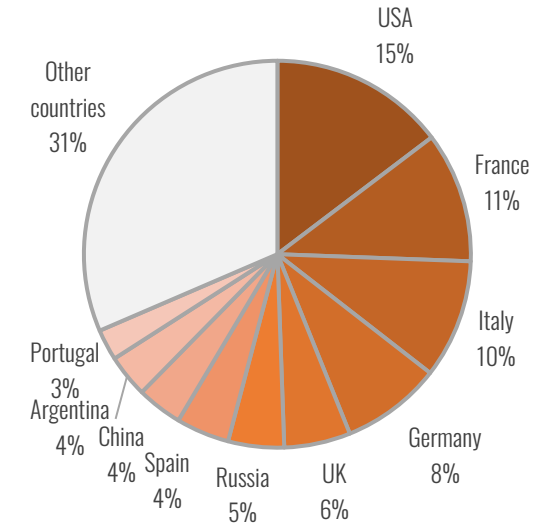
In 2022, there are **200 wine-consuming countries** in the world.

**Top 5 countries** account for **half of the world wine consumption**.

**Top 10 countries** represent **more than two thirds**.

**EU: 111 mhl** of wine consumed in 2022 (-2% / 2021), representing **48%** of the world consumption.

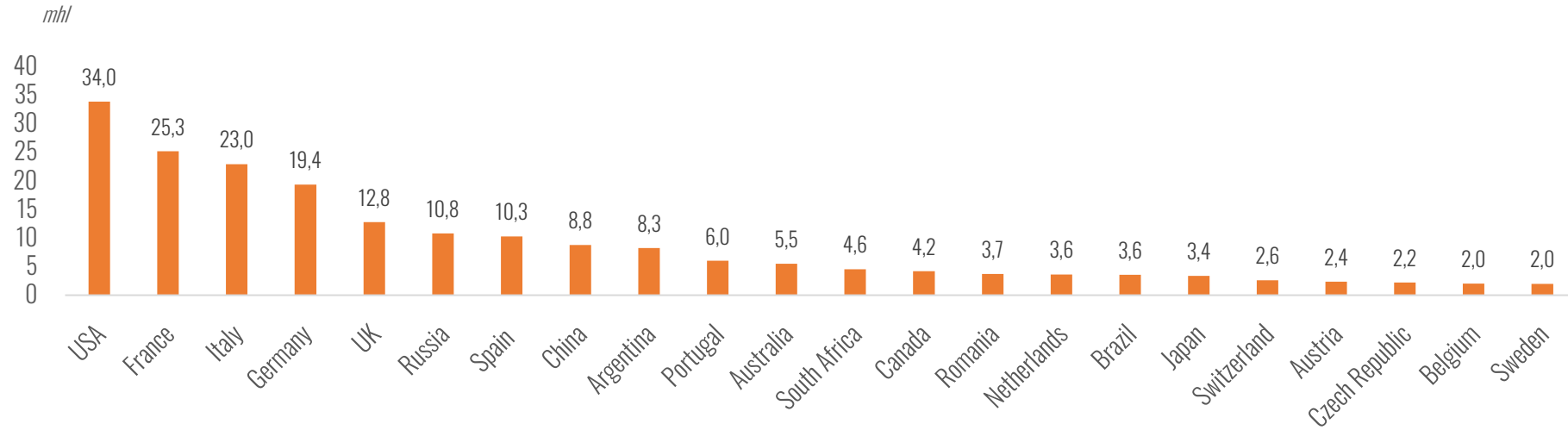
Breakdown of wine consumption in 2022



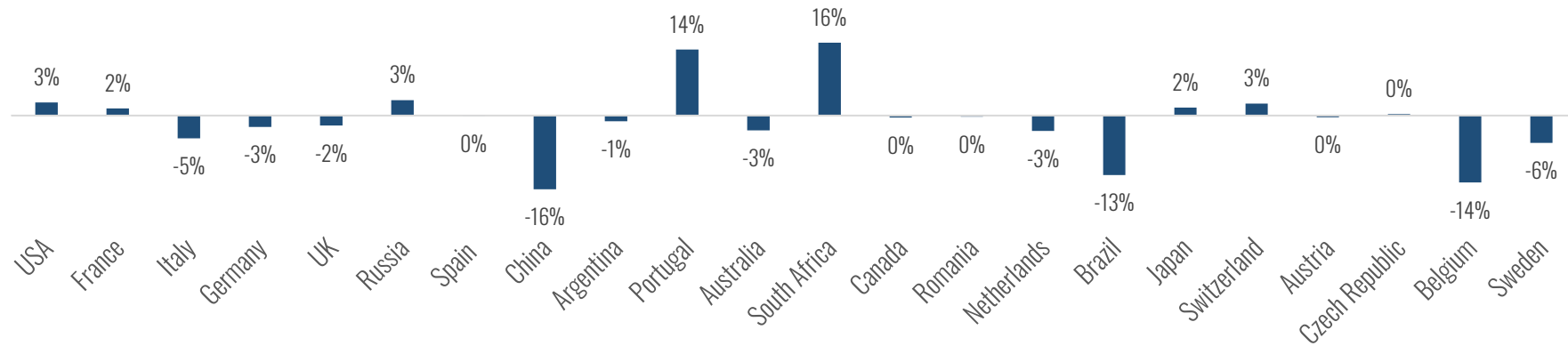


# Wine Consumption

### Main wine consuming countries in 2022



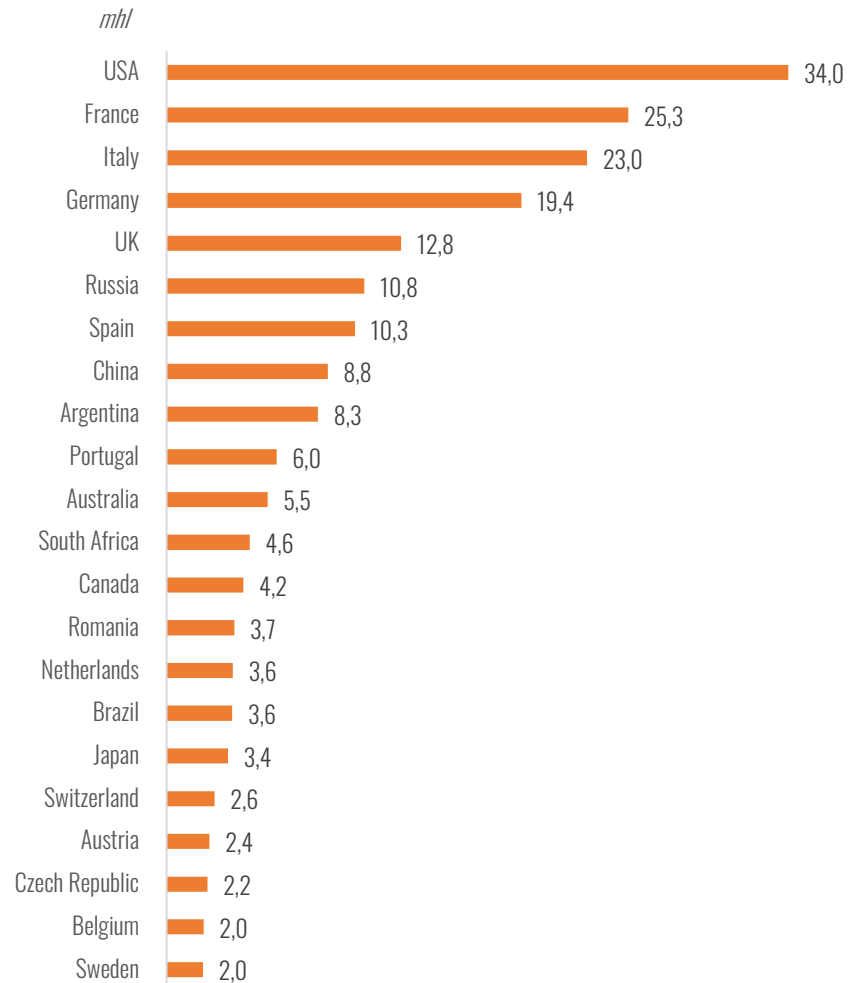
### 2022/2021 % Var.





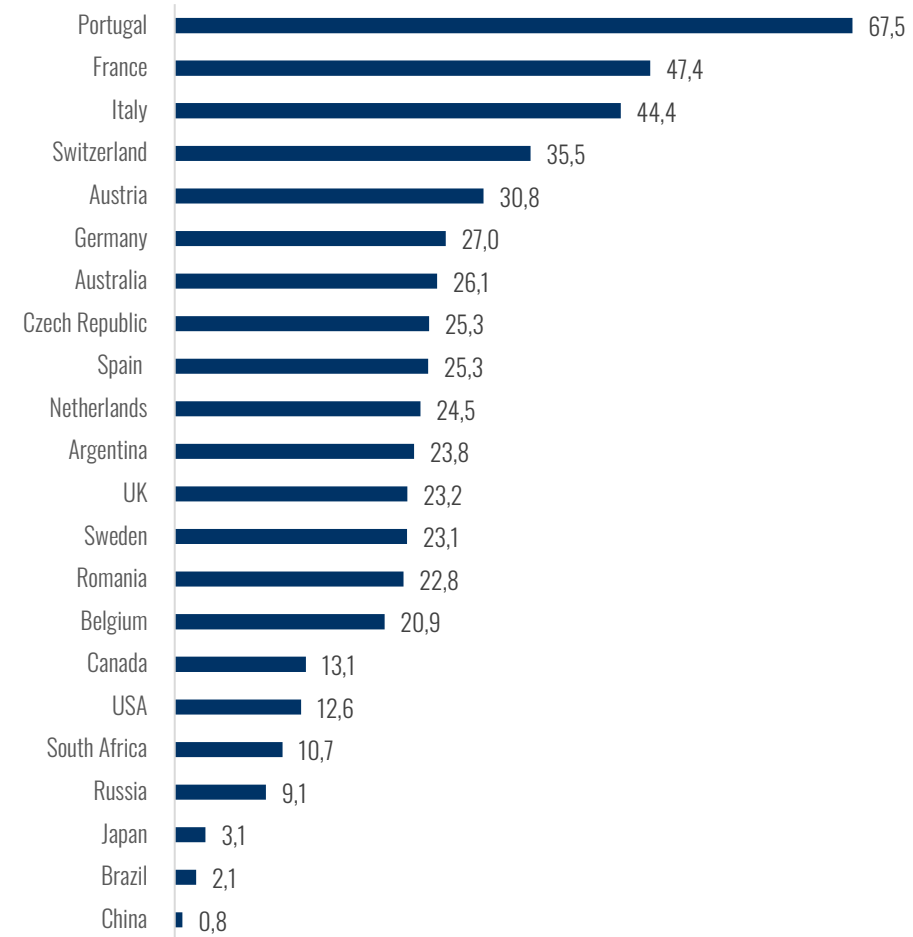
# Wine Consumption

## Top countries\* by total consumption in 2022

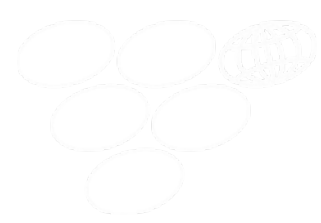


## Consumption per capita +15 in top consuming\* countries in 2022

*l/capita*



\*Countries with 2022 wine consumption above 2 mhl

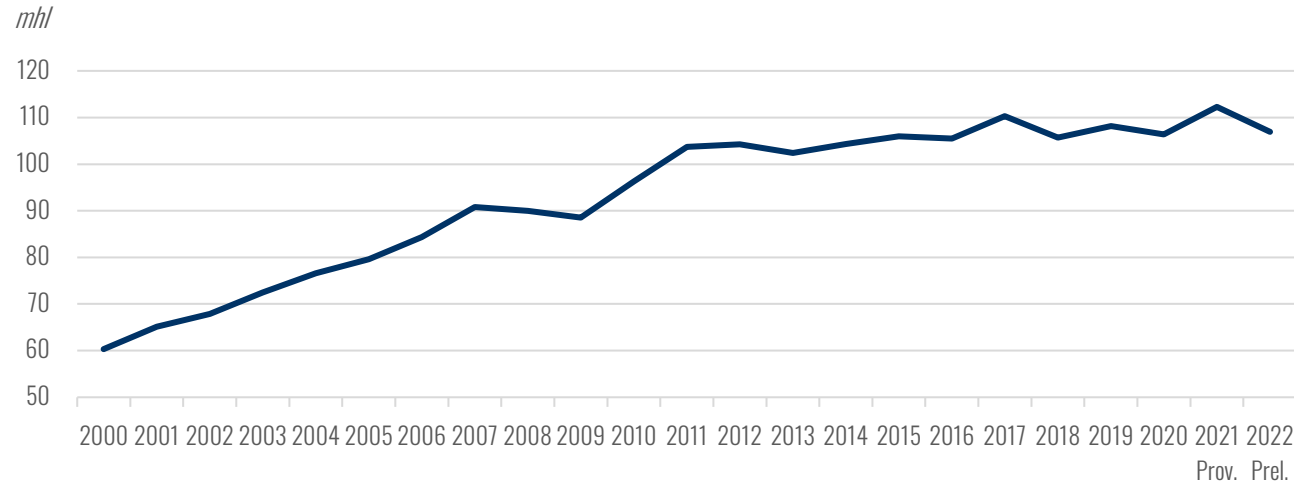


# International Trade of Wine





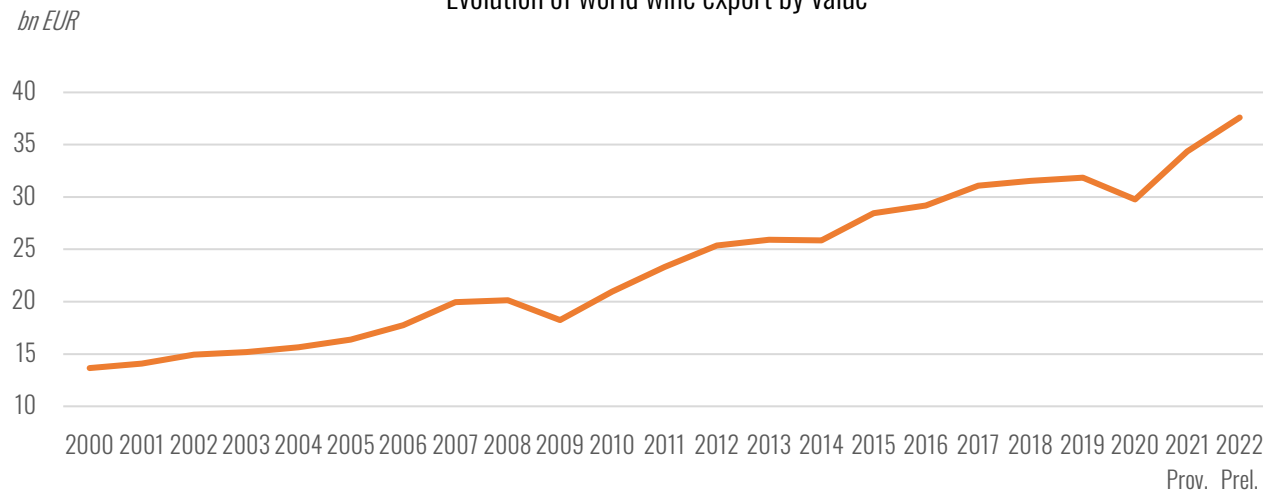
### Evolution of world wine export by volume



**107 mhl**  
-5% / 2021

With a volume of **107 mhl**, world wine exports in 2022 have **decreased by 5%** compared to 2021, which was record-high volume ever

### Evolution of world wine export by value

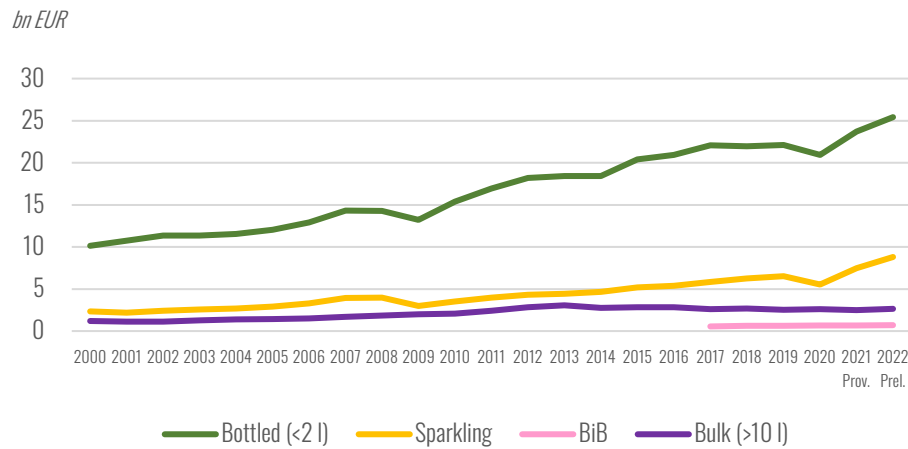
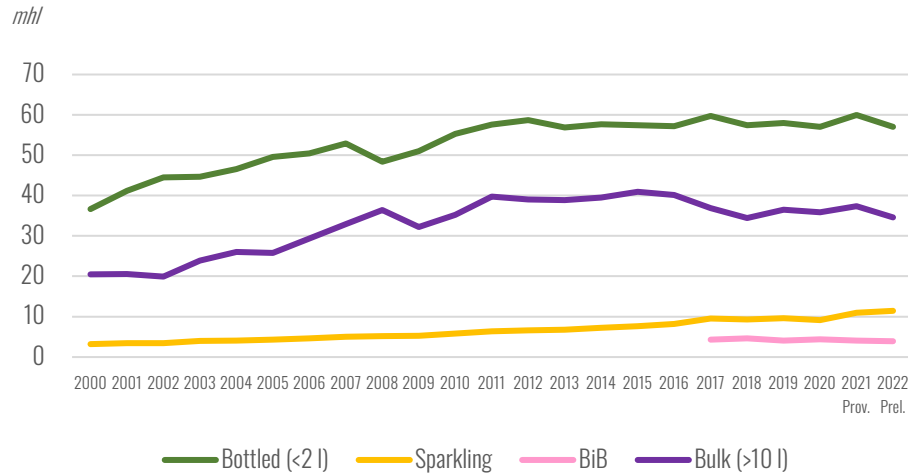


**37.6 bn EUR**  
+9% / 2021

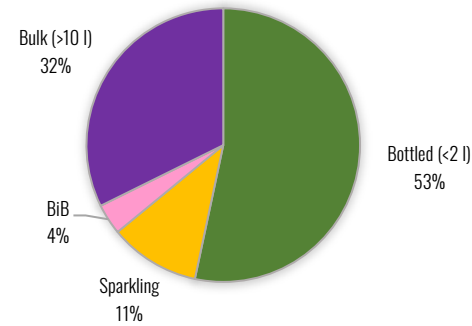
World wine exports in 2022 is **record-high** and **increased by 9%** compared to 2021 due to a **sharp rise in average export prices** in all major wine exporting countries



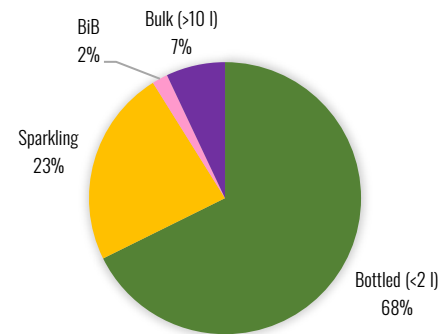
# International Trade of Wine



Breakdown of global trade volume in 2022



Breakdown of global trade value in 2022



**Bottled wine:**

Volume: -4% / 2021

Value: +7% / 2021

**Sparkling wine:**

Volume: +5% / 2021

Value: +18% / 2021

**Bag-in-Box (BiB):**

Volume: -4% / 2021

Value: +6% / 2021

**Bulk wine:**

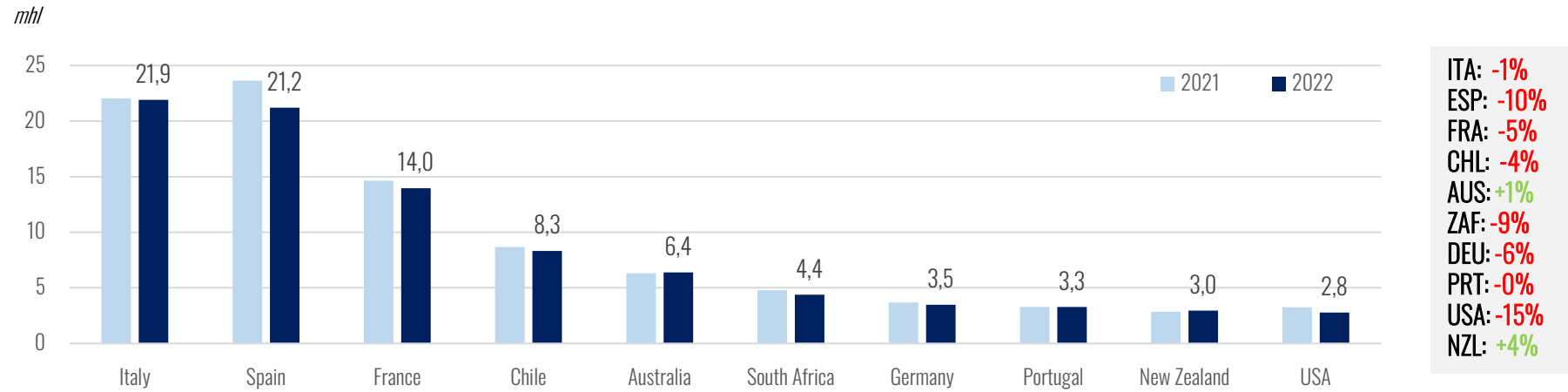
Volume: -7% / 2021

Value: +5% / 2021

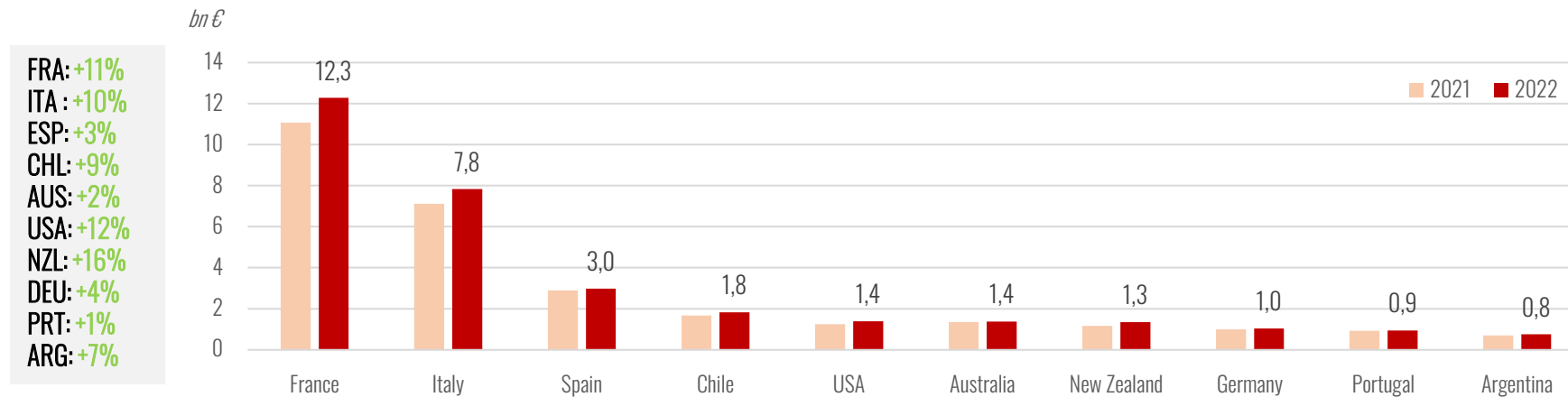


# Main Wine Exporters

### Top 10 by volume



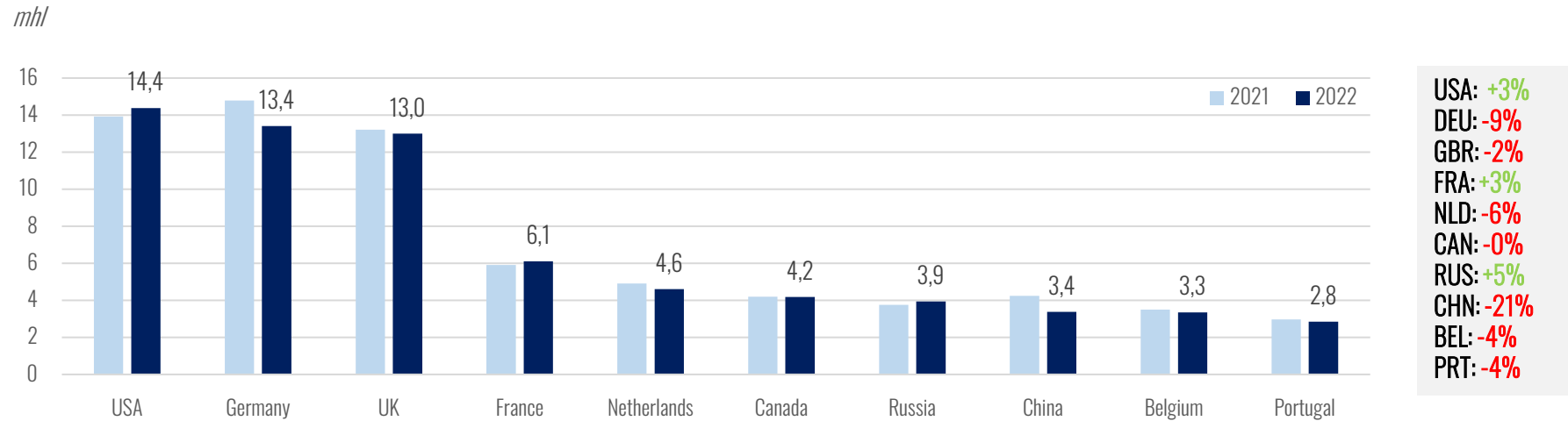
### Top 10 by value



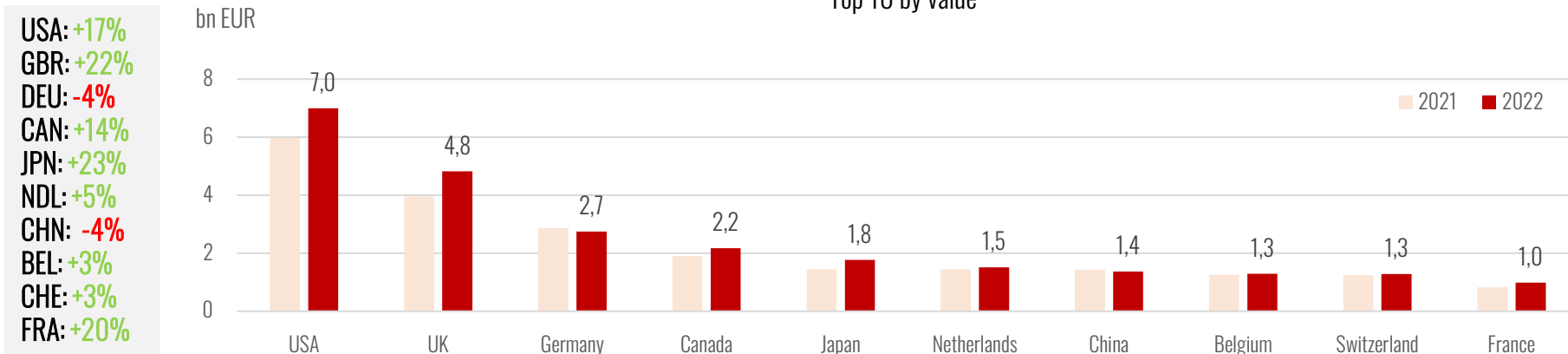


# Main Wine Importers

### Top 10 by volume

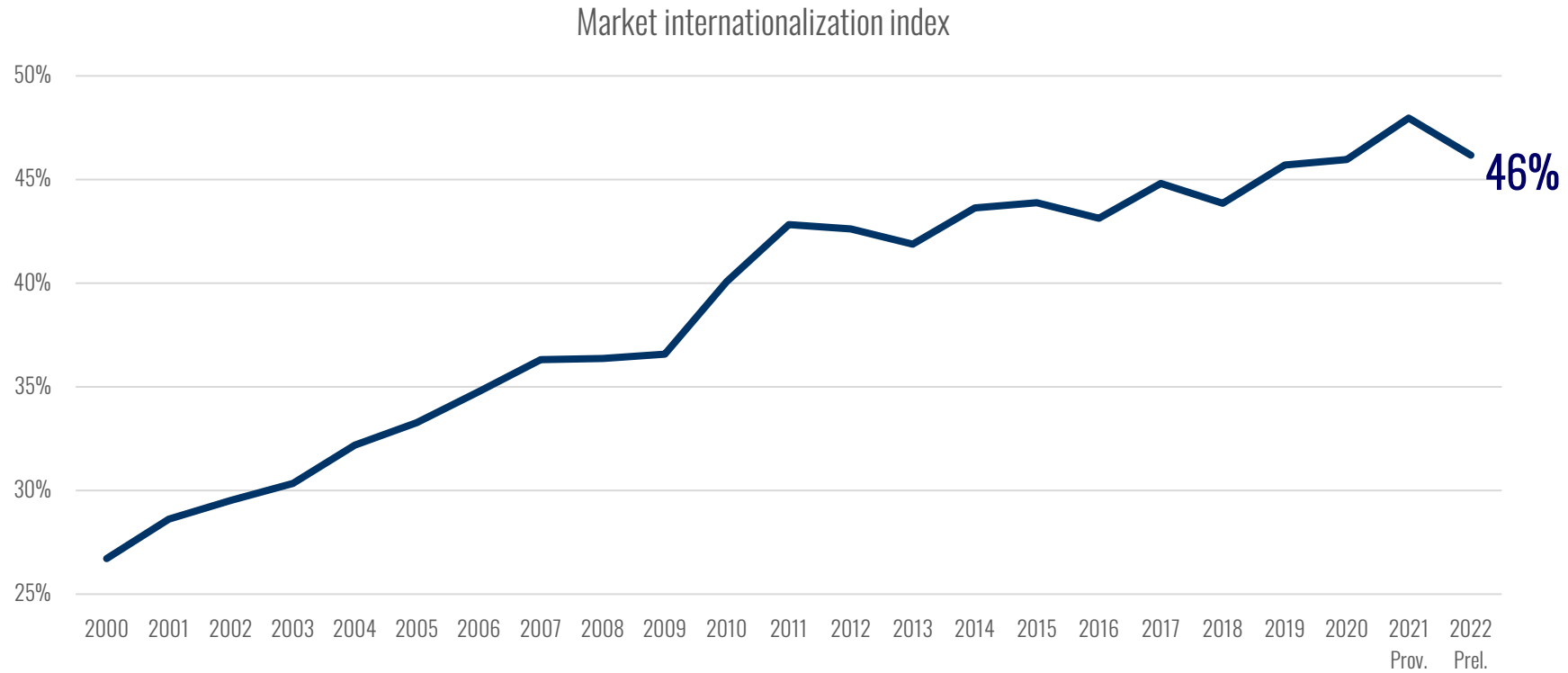


### Top 10 by value



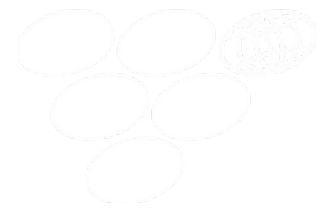


# Market Internationalisation Index



The wine **market internationalisation index** is constructed as the ratio between the volumes of world wine exports and world wine consumption.

In 2022, the wine market internationalisation index is at 46%, meaning that on average in 2022, of every 2 bottles of wine consumed in the world about 1 has crossed (at least) one border, that is **46% of the wine consumed in the world is imported wine.**



# Wine Production in the Southern Hemisphere in 2023

*First Estimates*



## Southern Hemisphere Wine Production 2023

	Prov. 2022	Prel. 2023	Trend 2023	% Var. 23-22	Trend 2000-2023
Argentina	11 451	<i>9 046</i>		-21.0%	
Australia	12 745	<i>11 077</i>		-13.1%	
Brazil	3 200	<i>2 250</i>		-29.7%	
Chile	12 444	<i>12 605</i>		1.3%	
New Zealand	3 830	<i>2 980</i>		-22.2%	
South Africa	10 155	<i>9 546</i>		-6.0%	



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**THANK YOU FOR  
YOUR ATTENTION**