MINISTERO DELL'AGRICOLTURA DELLA SOVRANITÀ ALIMENTARE E DELLE FORESTE

OIV International Organisation of Vine and Wine Intergovernmental Organisation

ISMEA

WINE MINISTERIAL MEETING

BRESCIA | VERONA

April 11-13 2024









Note on the data used in this report

The information in this report is the result of ISMEA's processing of OIV and UN Comtrade data.

The percentage changes are calculated on the basis of five-year averages, all of them between 2000–2004 and 2019–2023.

The figures for 2023 are provisional.

Data on vineyard surface areas refer to both wine grapes and table grapes.

Introduction

The world's vineyard area has decreased over the last decade, but there is a great deal of variation in the evolution from one country to another. Looking at the change between 2004 and 2023, the main European countries (Italy, France, Spain and Portugal) together lost about 503,000 hectares of vines (-16%), while the main "New World" countries (the United States, Chile, Argentina, Australia and South Africa) maintained or slightly increased their areas. China, a traditionally non-wine-producing country, doubled its area under vines and now ranks just behind Spain (950 000 ha) and France (800 000 ha) and ahead of Italy (715 000 ha) in the world rankings of areas under vines; however, in the case of China, much of its area under vines is devoted to table grapes and not specifically to wine production.

World wine production fell by an average of 14.7 million hectolitres between the five-year period 2000–2004 and the five-year period 2019–2023, i.e. -5.4% in volume terms, due to sharp falls in production in France (-17.6%), Spain (-18.2%) and, to a lesser extent, Italy (-5.4%). In contrast, production increased in the United States (+19.4%), Australia (+6.4%) and, in particular, in South Africa (+30.1%) and Chile (+88.7%). World production over the last five years is estimated at 256 million hectolitres, about half of which comes from the top three producers, Italy, France and Spain. These three countries also share trends, European wine policies and traditions in the production and consumption of wine, although in terms of consumption France and Italy, together with the United States, occupy the top positions in the world rankings, while Spain remains in a more distant position.

On the demand side, the main European wine-producing countries generally share common characteristics, with a decline in domestic consumption and a significant improvement in exports. Over the last five years, the highest average wine consumption has been in the United States, followed by France and Italy, while Spain remains in eighth place with only 10 million hectolitres, compared to 33.7 million in the US and 24.6 million in France, all within the estimated average world wine consumption of 232 million litres between 2019 and 2023*. Despite ups and downs and fluctuations in production or vineyard area, world consumption has been particularly stable in recent years. This stability is due to the increase in wine consumption in non-producing or non-European producing countries, such as the United States, the United Kingdom, China, Russia and Australia, which compensates for lower consumption in traditional producing countries. These same countries are also among the world's largest importers of wine, with a sharp increase in the quantities purchased abroad between 2019 and 2023 compared to the five-year period 2000–2004.

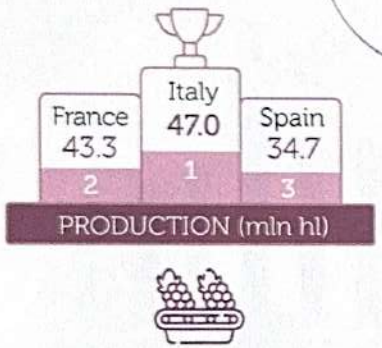
Faced with declining domestic wine consumption, the world's leading producers have for some time been turning to the international market to meet and satisfy growing foreign demand. In the five-year period 2019–2023, the average exports of Italy, Spain and France accounted for more than half of world exports by volume; compared to the five-year period 2000–2004, Italy and Spain recorded a significant increase in hectolitres shipped abroad (+39% for the former and +94% for the latter), while French wine volumes fell by 8%. Over the same period, exports from "New World" countries such as Chile, South Africa, New Zealand and Canada "exploded", although volumes are still low. However, in 2020, the closure of the world's horeca channels as a measure to contain the spread of Covid-19 led to an immediate collapse in international wine trade, a shock for the entire sector. In 2021, there is a rapid recovery in trade, and in 2022, thanks mainly to higher international prices, there is an increase in the value of wine exports, but the volumes traded are shrinking for many countries. This negative trend in exports is exacerbated in 2023.



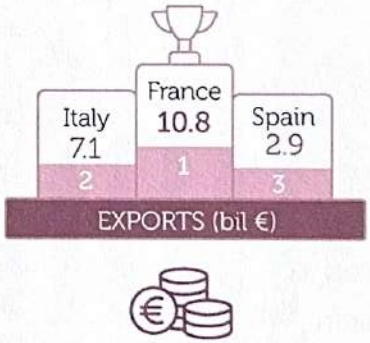
Vineyard Landscape of Piedmont:
Langhe-Roero and Monferrato
UNESCO Heritage site

World records in the wine industry

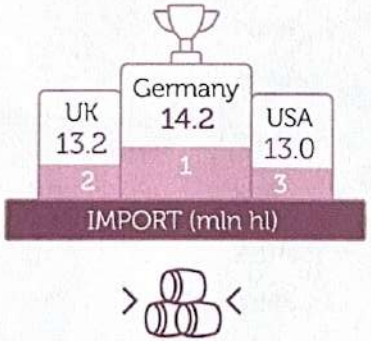
Average 2019–2023

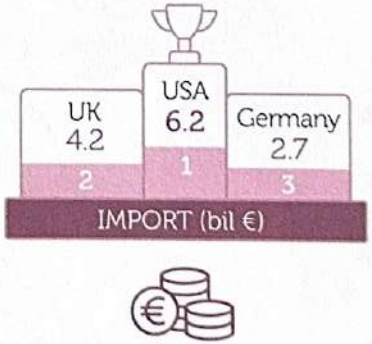




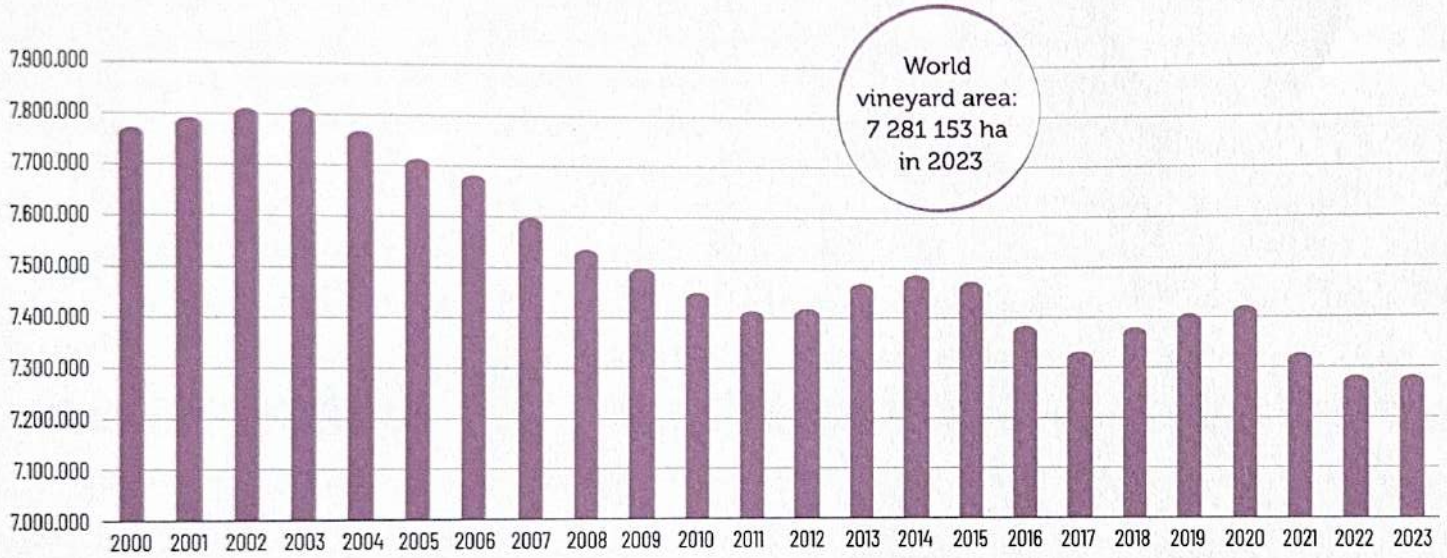








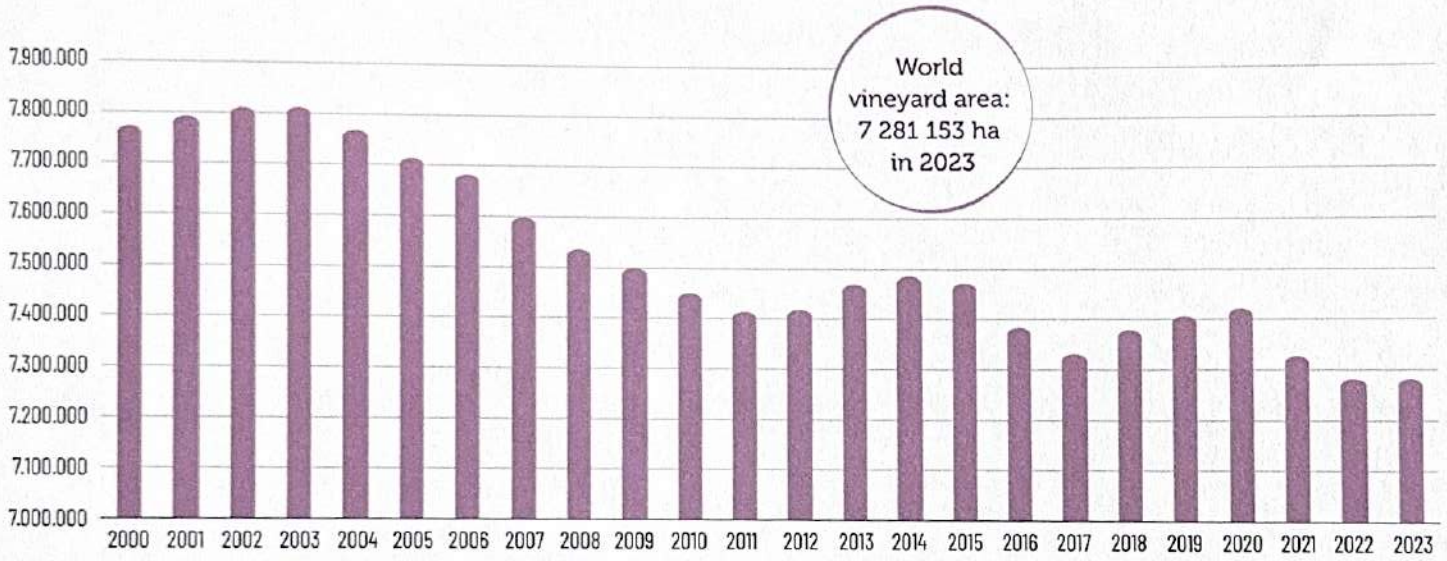
Evolution of vineyard surface area (ha)



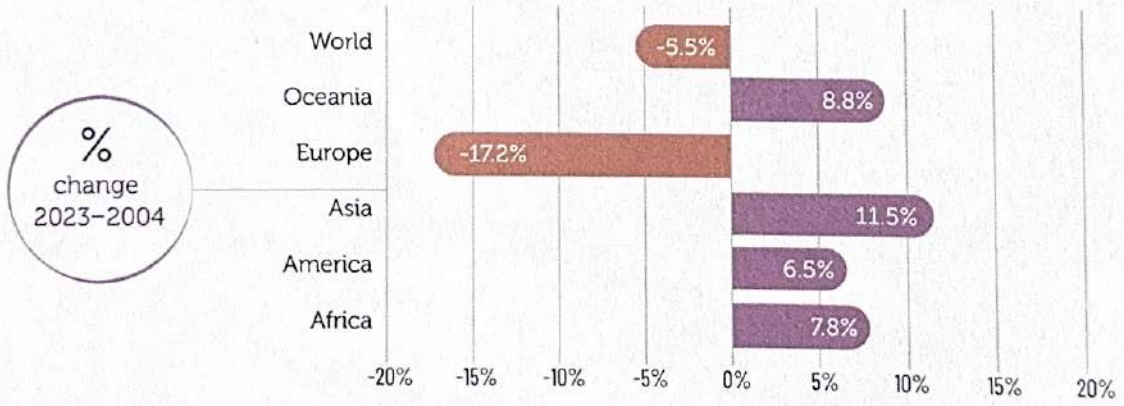




Evolution of vineyard surface area (ha)







World vineyard surface area



7 281 153
hectares
in 2023



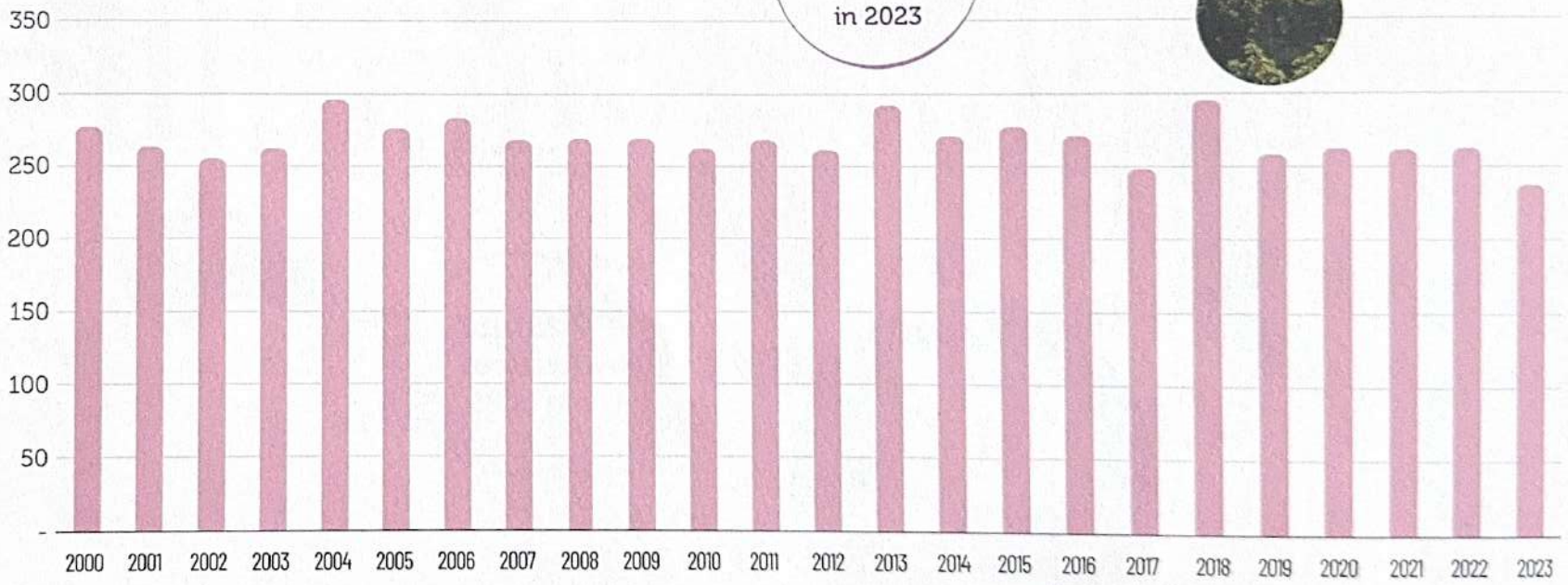
The slow decline in world wine production





Evolution of wine world production (1 000 hl)

World production: 237 mln hl in 2023

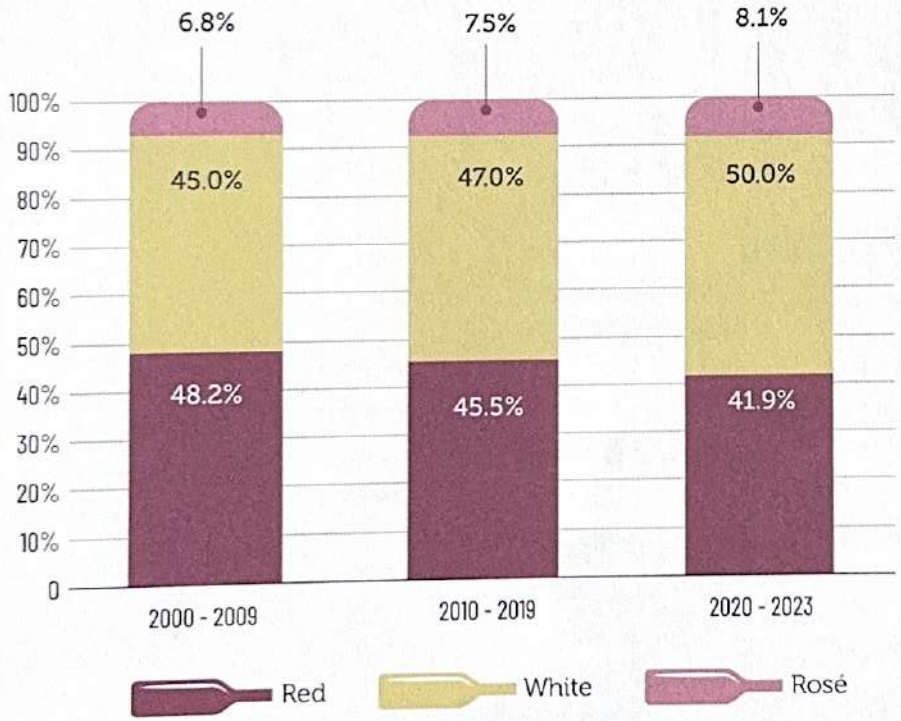




Global wine production by country

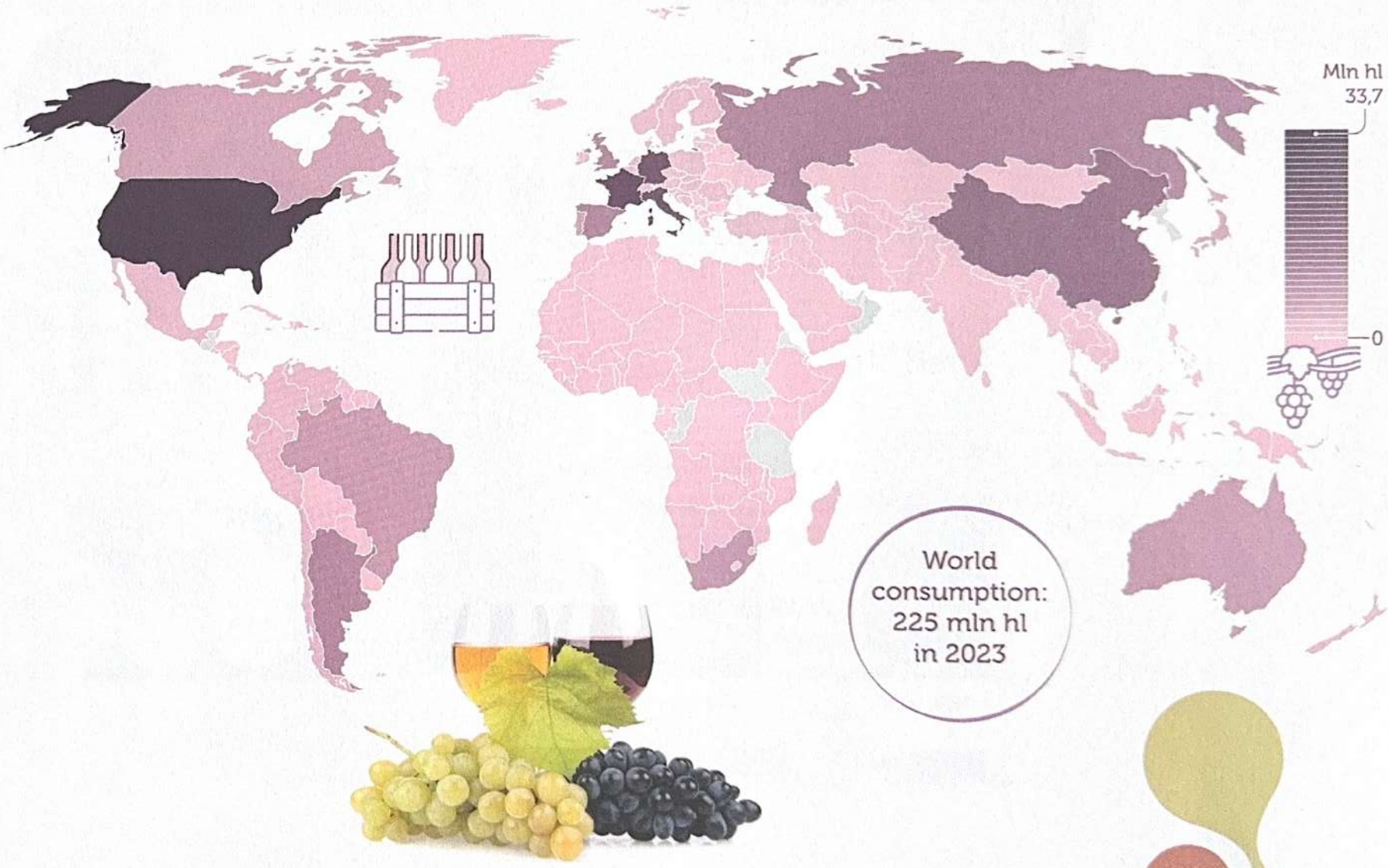
	Country	Average 2019–2023 1 000 hl	share %	% change 2023–2004
1	Italy	46 964	18%	-5.4%
2	France	43 344	17%	-18.2%
3	Spain	34 740	14%	-17.4%
4	USA	24 020	9%	19.4%
5	Australia	12 020	5%	6.4%
6	Chile	11 600	5%	88.7%
7	Argentina	11 320	4%	-18.9%
8	South Africa	10 080	4%	30.1%
9	China	5 740	2%	-48.6%
10	Germany	5 260	2%	-43.8%
11	Russia	4 623	2%	14.5%
12	Portugal	4 312	2%	-40.1%
13	New Zealand	3 280	1%	335.5%
14	Brasil	2 562	1%	-21.7%
15	Hungary	2 514	1%	-43.4%
	Other countries	33 504	13%	26.9%
	World	**255 883**	**100%**	-5.4%

Share of wine production by colour in world wine production

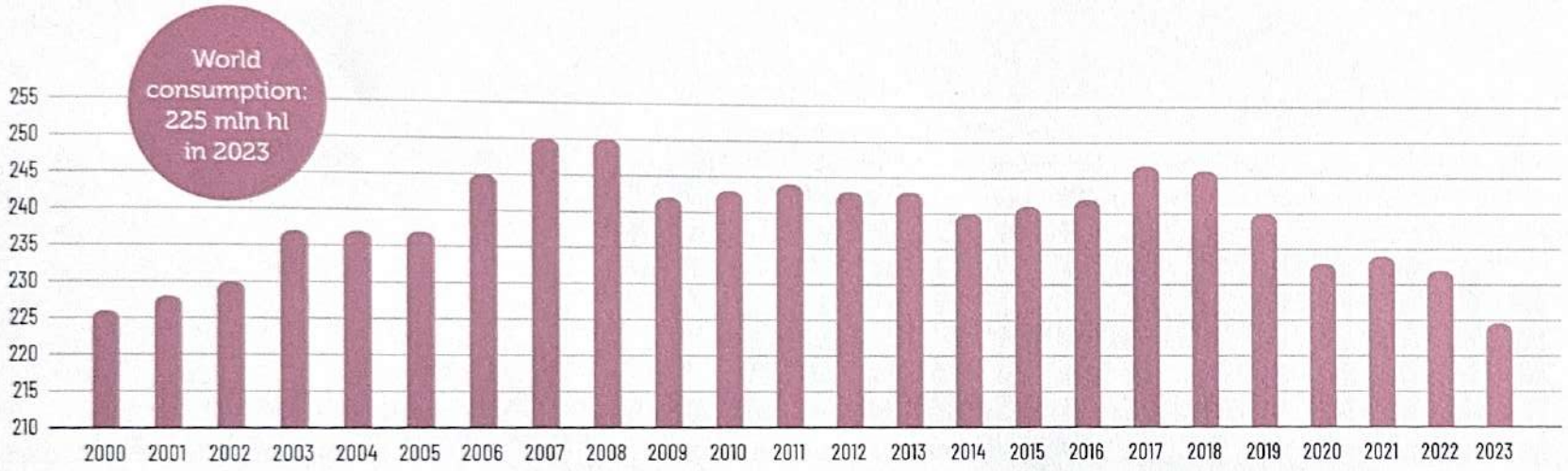




Wine consumption in the world

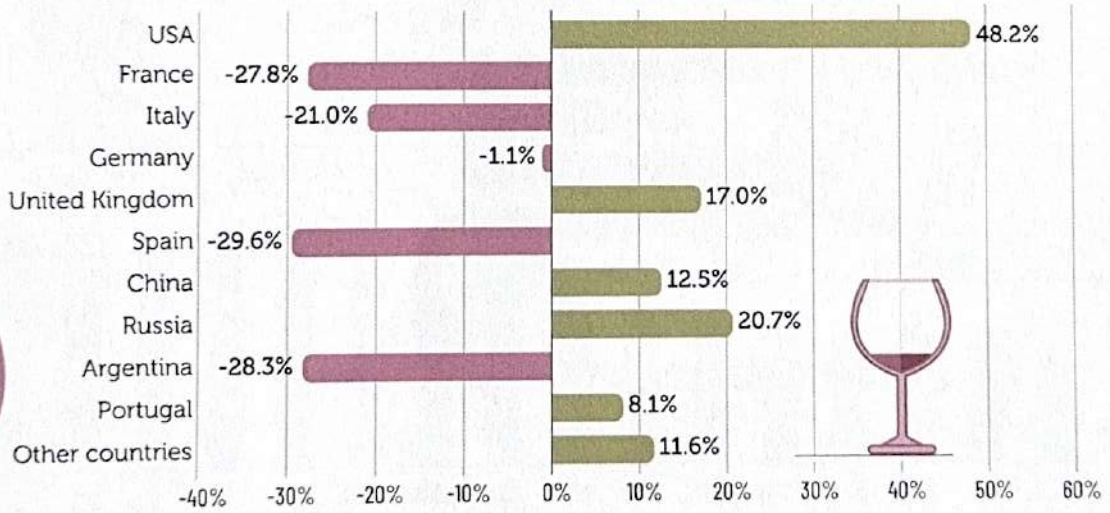


The fast decline in wine consumption



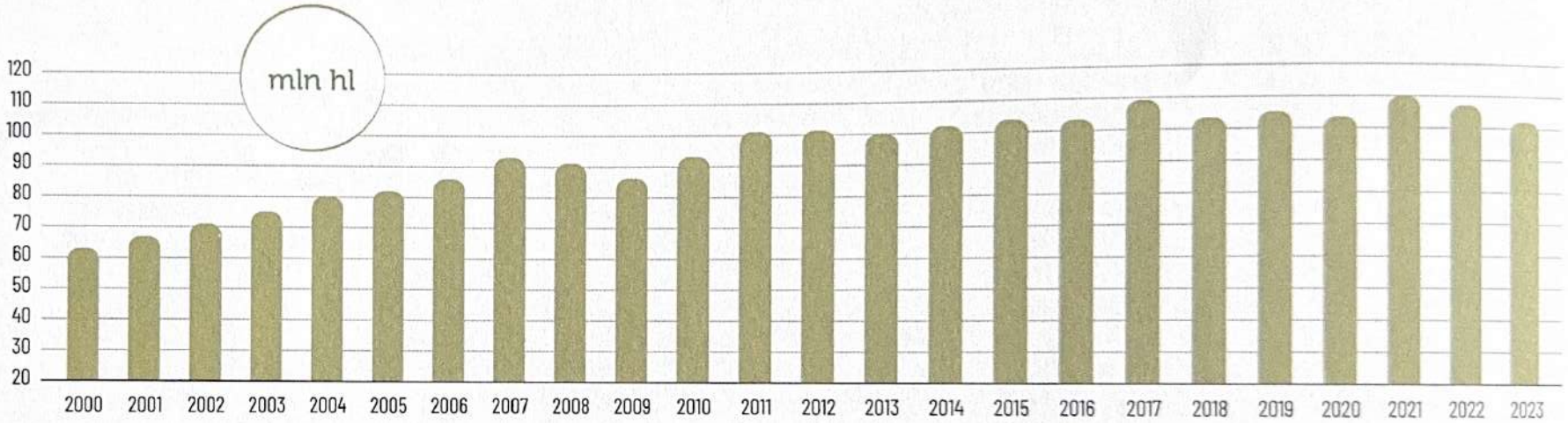


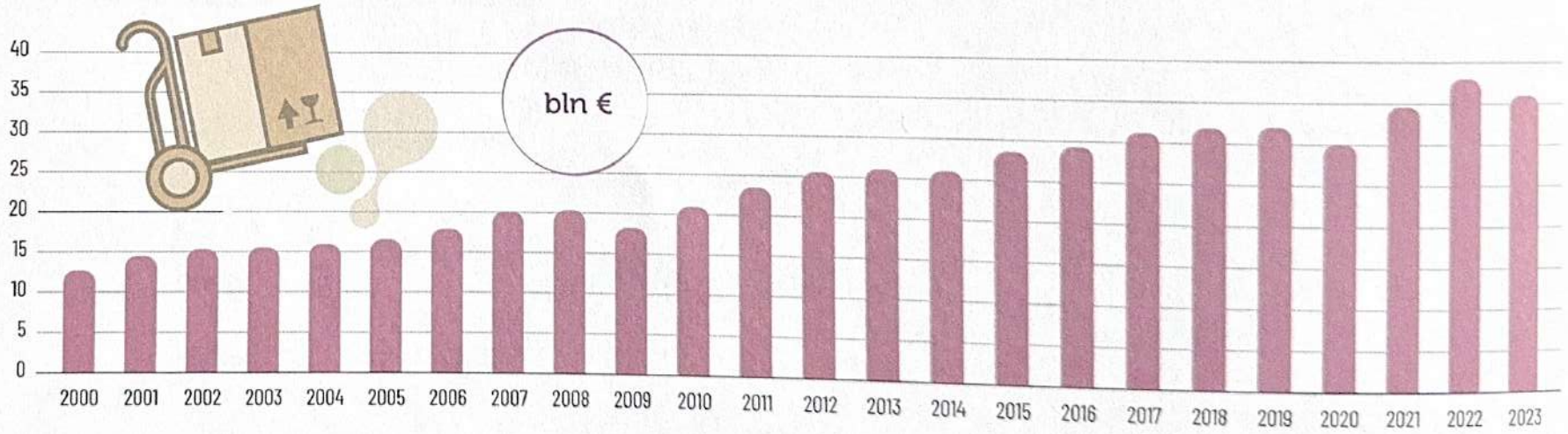
Wine consumption trends of top ten countries
% change 2023–2004



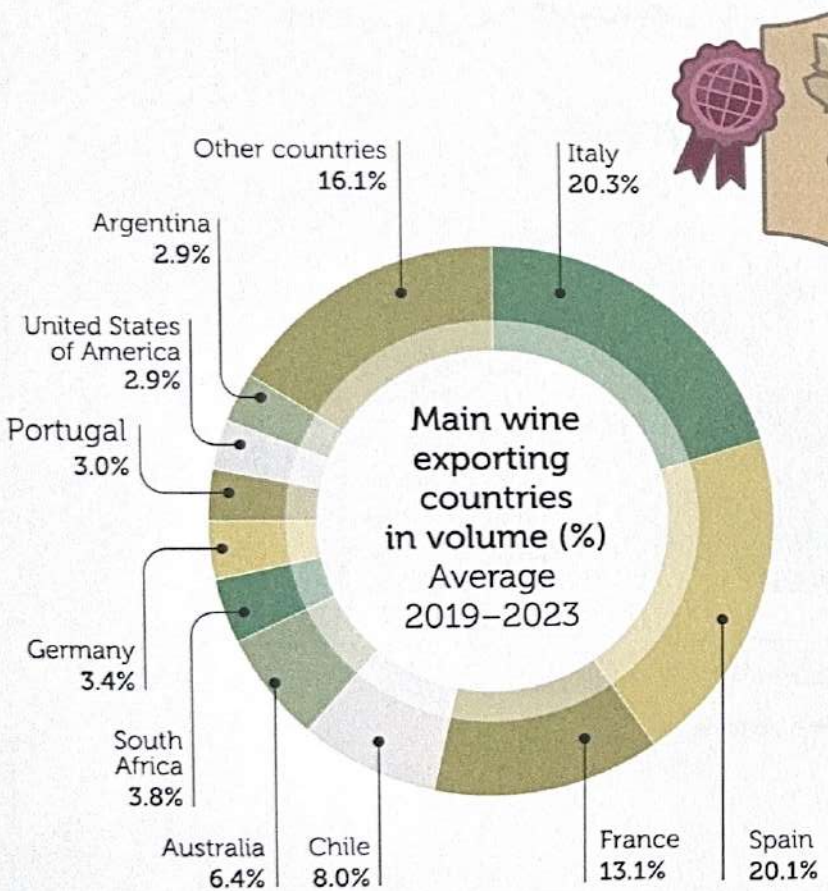
Covid-19 imprints negative mark on wine exports

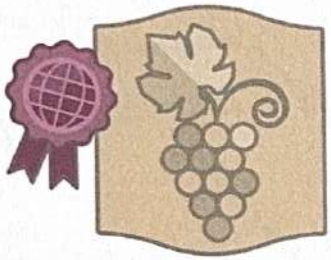
Evolution of world wine export

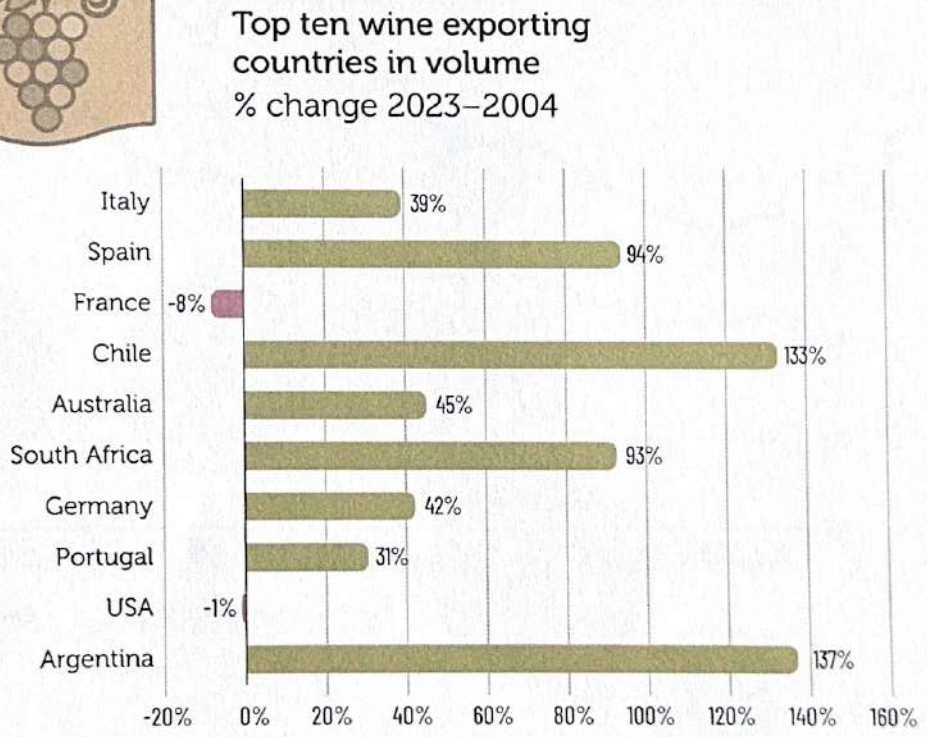




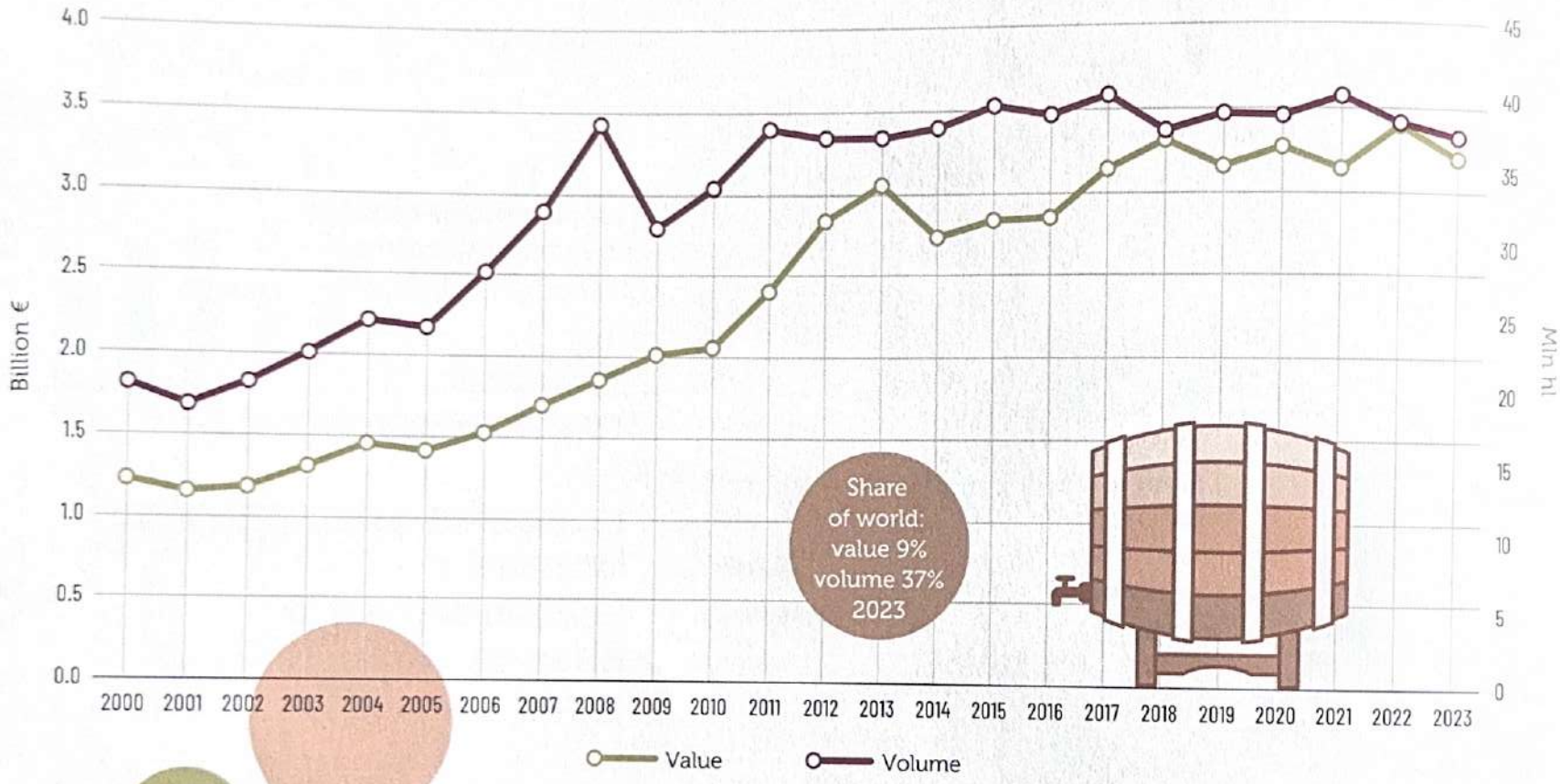
The wine trade is a game with relatively few players on the export side





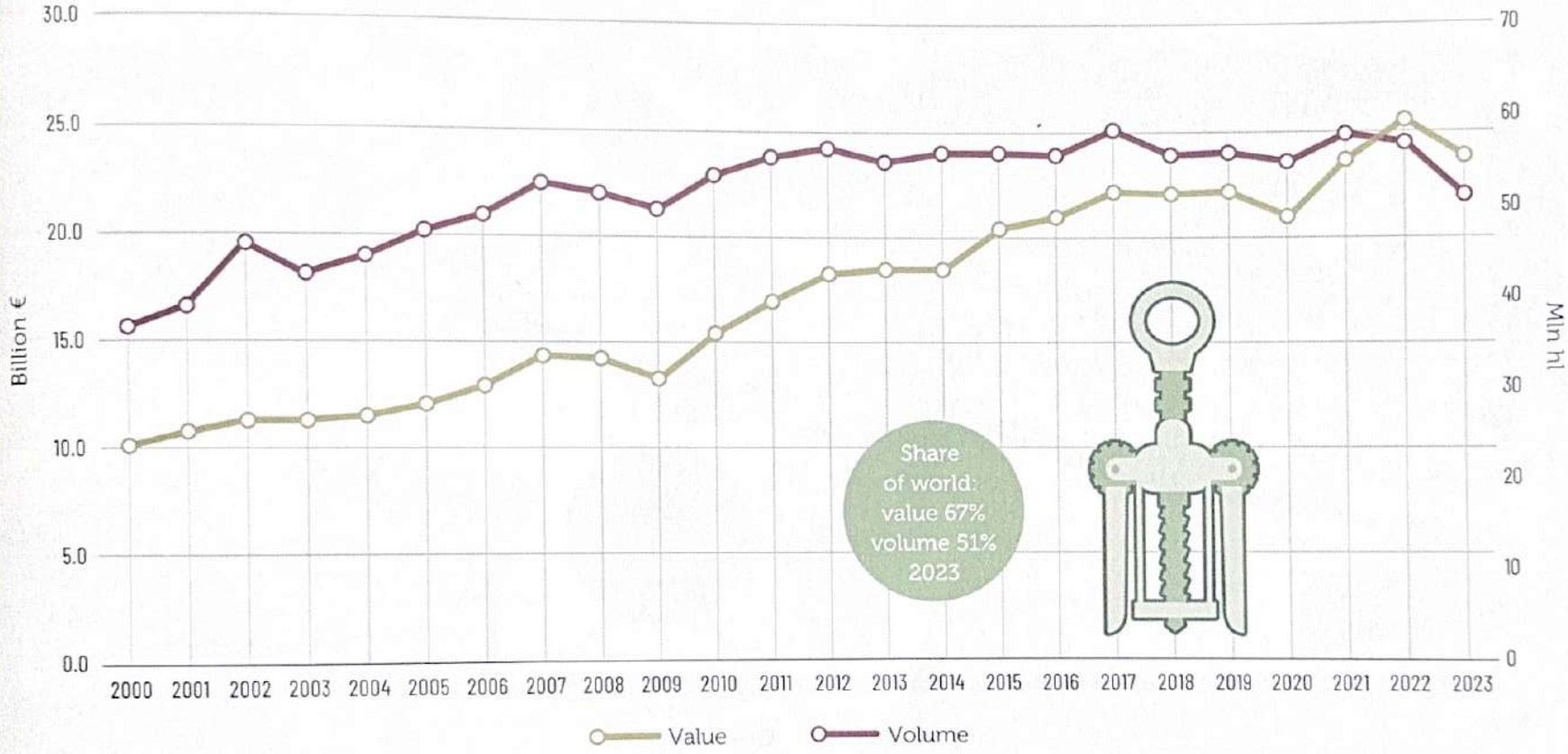


Bulk and BiB wine world exports





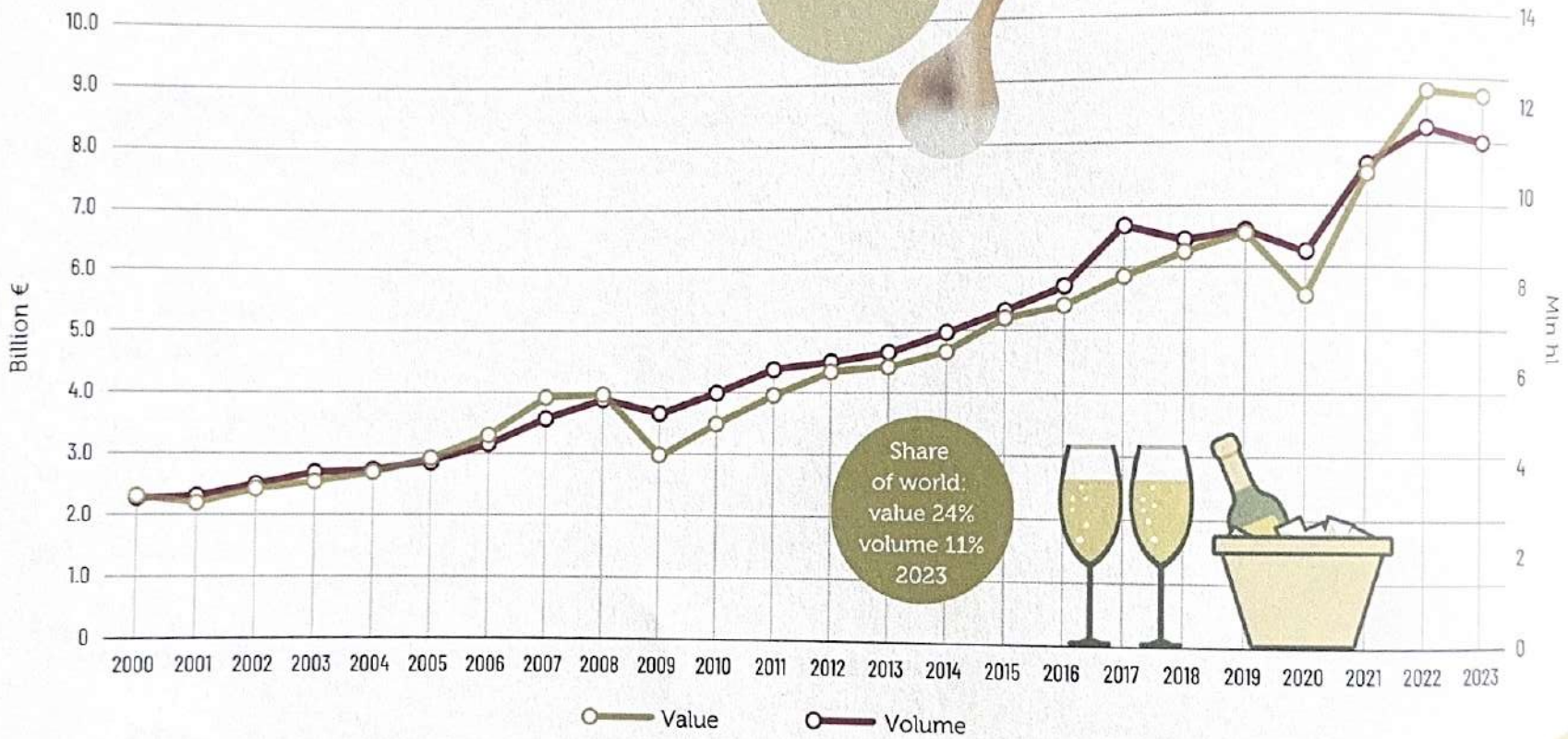
Bottled wine world exports



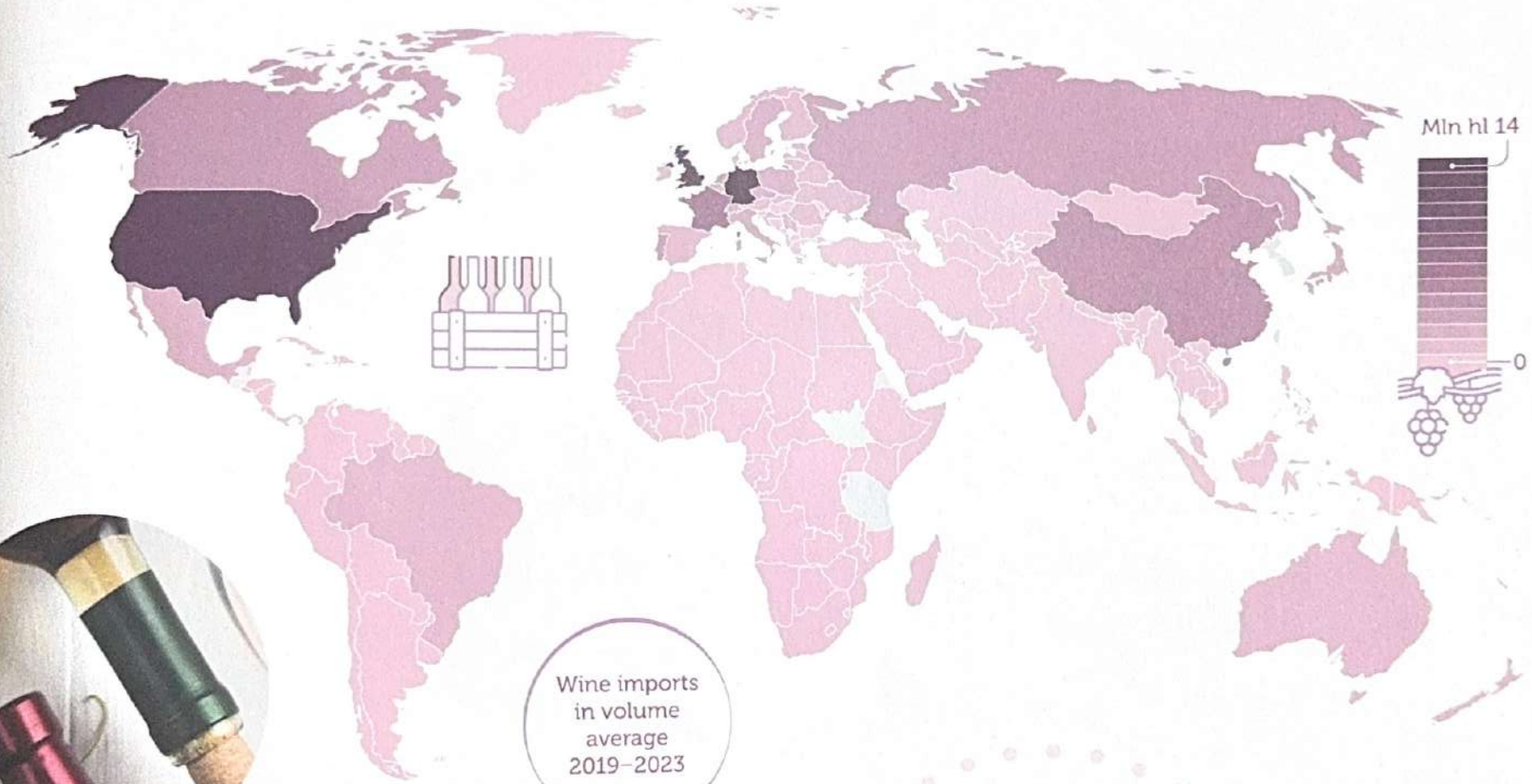


Sparkling wine world exports





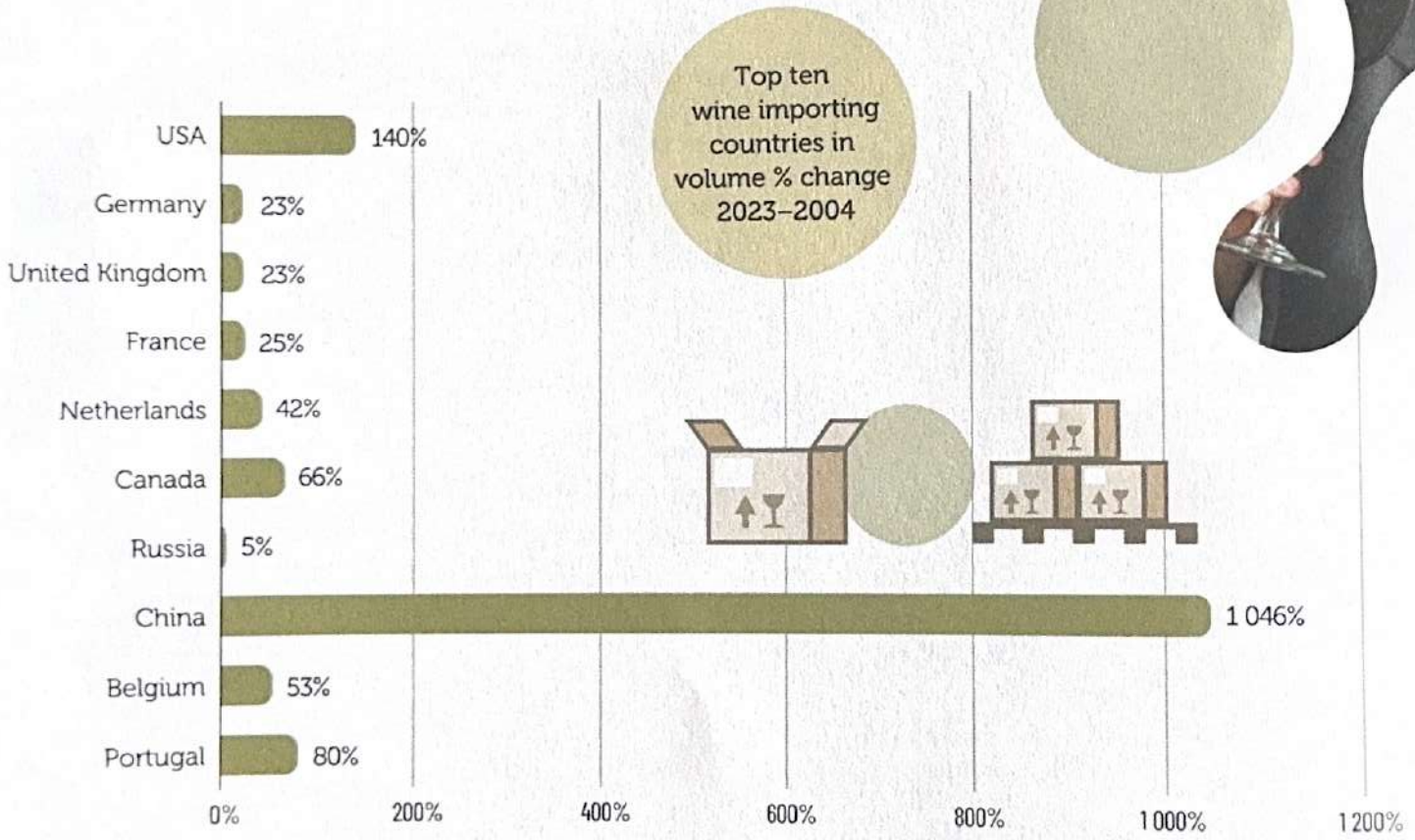
Wine importing countries in volume





Evolution of top ten wine importing countries






Colline del Prosecco di Conegliano e Valdobbiadene
UNESCO Heritage site



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