OIV
Organisation Internationale
de la Vigne et du Vin

2015 GLOBAL ECONOMIC VITIVINICULTURE DATA

2015 World wine production estimated at 275.7 mhl

With a slight rise of 2% compared with the previous year, world wine production in 2015 is at a good average.

- **Italy**, with **48.9 mhl**, has again become the biggest producer in the world, followed by **France (47.4 mhl)**
- **Spain** has returned to **an average level of production (36.6 mhl)**
- The **United States** has recorded a high level of production of **22.1 mhl** for the second year running (+0.5% compared with 2014)
- In South America, **Argentine production has declined (13.4 mhl)**, while **Chile** has seen record production (**12.87 mhl**)
- **Australian** (12 mhl) and **New Zealand** (2.4 mhl) production has remained almost stable for 3 years, excluding the exceptional 2014 production in New Zealand

Contents:

Abbreviations:
khl: thousands of hectolitres
mhl: millions of hectolitres

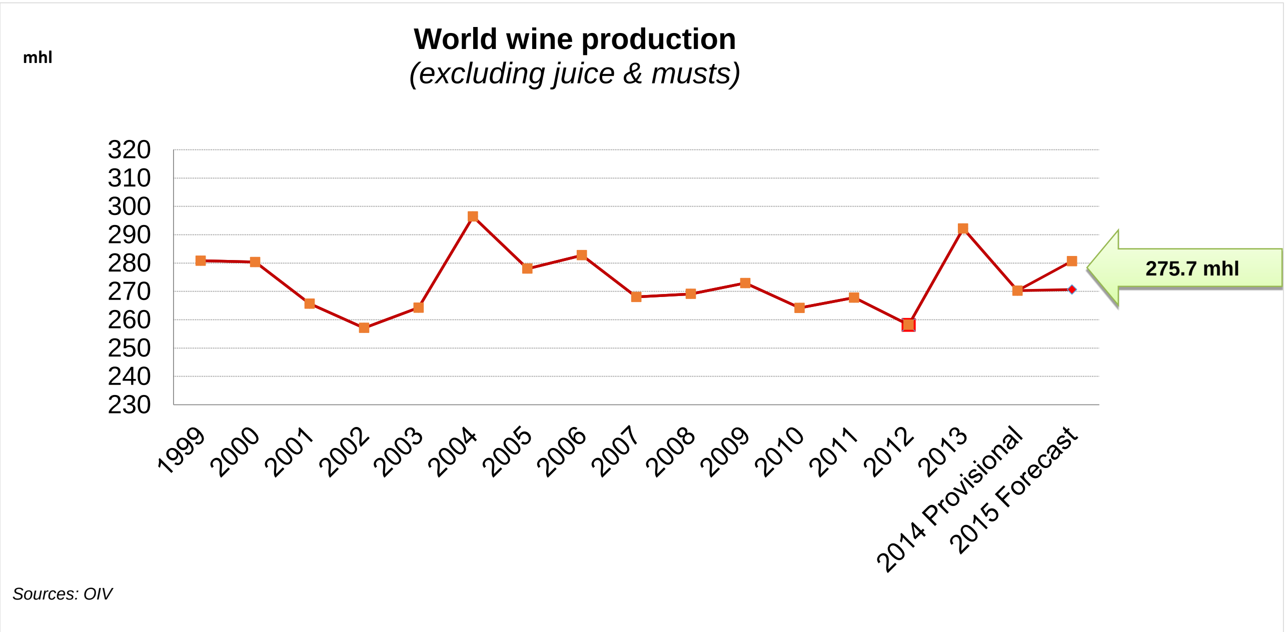
1. 2015 Wine production

Worldwide

To evaluate world wine production at this time in the year, a variability hypothesis of 10% of the 2014 harvest level for countries for which information has not been provided in 2015 is considered here. This information leads to the estimation of 2015 **world wine production, excluding juice and musts,** at between 270.7 and 280.7 mhl (275.7 mhl at the mid-range estimate).

A slightly upward trend in production has been identified, at between +0.2% and +3.9% – up by just over 5 mhl compared with 2014 vinified production (+2%).

Figure 1 – World wine production trends



In the EU

In the European Union (EU), 2015 wine production is evaluated, at the mid-range estimate, at **164.6 mhl** (excluding juice and musts). There has been moderate growth of 5.6 mhl, equivalent to +4% compared with 2014 production (provisional result of 159 mhl).

Subsequent to poor to average levels of production between 2007 and 2012, 2013 production was significant (174 mhl excluding juice and musts). Following this, production in 2014 and 2015 may be considered as average in terms of volume. 2015 wine production has therefore established itself at a slightly higher level than the last five-year average (excluding extreme production values).

Indeed, 2015 forecasts from the three main European producing countries in 2015 (**Italy, France and Spain**) were **48.9, 47.4 and 36.6 mhl** respectively, equating to close to and slightly higher than the average productions for the 2010-2014 period at +6%, +7% and +3%[1] respectively.

Portugal and **Romania**, with forecasts of **6.7 and 4.1 mhl** respectively, fall in line with this trend (+7% and +10%[1]). Meanwhile, **Bulgaria,** with **1.5 mhl,** has returned to a level of production in keeping with its potential after a very poor harvest in 2014.

However, **Germany** (**8.8 mhl**) and **Greece** especially (**2.7 mhl**) have recorded a decline in production in 2015 (-1% and -11%[1]).

It should be mentioned finally that 2015 production forecasts in **Austria** and **Hungary**, with **2.4 and 2.9 mhl** respectively, indicate high growth in relation to 2014 production levels (+18% and +12%).

Outside the EU

In the main producing countries outside the EU, **2015 production** – as for that of 2014 – should see **a decline compared with the significant 2013 production, yet be higher than that recorded between 2010 and 2012.**

Between 2010 and 2012, a fairly stable level of vinified production was recorded. 2013 vinified production had marked a departure from this trend and showed significant growth compared with that of 2012.

The **United States, with 22.1 mhl vinified (+0.5%/2014)**, has recorded a high level of production for the second year running, yet without reaching that of the record production in 2013.

In South America, contrasting developments in Argentina and Chile have offset each other. **Argentina**, which maintained a vinified production in 2014 similar to the high level in 2013 (around 15 mhl), has recorded a subsequent decline in 2015, with 13.4 mhl vinified (-12.1%/2014). At the same time, 2015 production in **Chile** has hit a new record with 12.9 mhl, which is very close to that of 2013 (12.8 mhl) and represents notable growth compared with the vinified production in 2014 (10.5 mhl), equivalent to +22.6%.

South Africa, with a production of 11.3 mhl, has maintained its 2014 level.

In **Oceania**, 2014 production in New Zealand has set a record at nearly 3.2 mhl. Excluding this atypical reference, production in Australia and New Zealand, with 2015 forecasts of 12 mhl and 2.4 mhl respectively, has been fairly stable for 3 years in Australia and similar to 2013 production in New Zealand.

Table 1 shows the quantitative developments for countries for which information has been provided with a wine production of more than 1 mhl.

1 2015 variation compared with the five-year average excluding minimum and maximum productions during the period.

Table 1: Wine production (excluding juice and musts) (1)

Unit: 1000 hl	2010	2011	2012	2013	2014 Provisional	2015 Forecast	2015/2014 Variation in volume	2015/2014 Variation in %	Ranking
Italy	48 525	42 772	45 616	54 029	44 229	48 869	4640	10%	1
France	44 381	50 757	41 548	42 134	46 804	47 373	569	1%	2
Spain	35 353	33 397	31 123	45 308	38 211	36 600	-1611	-4%	3
United States (2)	20 887	19 140	21 650	23 590	22 020	22 140	120	1%	4
Argentina	16 250	15 473	11 778	14 984	15 197	13 358	-1839	-12%	5
Chile	8 844	10 464	12 554	12 820	10 500	12 870	2370	23%	6
Australia	11 420	11 180	12 259	12 310	12 020	12 000	-20	0%	7
South Africa	9 327	9 725	10 569	10 982	11 316	11 310	-6	0%	8
China*	13 000	13 200	13 511	11 780	11 178	*11 178*	0	0%	9
Germany	6 906	9 132	9 012	8 409	9 202	8 788	-414	-4%	10
Portugal	7 148	5 622	6 327	6 231	6 195	6 703	508	8%	11
Russia *	7 640	6 980	6 220	5 290	4 880	*4 880*	0	0%	12
Romania	3 287	4 058	3 311	5 113	3 750	4 069	319	9%	13
Hungary	1 762	2 750	1 818	2 618	2 555	2 873	318	12%	14
Brazil*	2 459	3 460	2 967	2 710	2 732	*2 732*	0	0%	15
Greece	2 950	2 750	3 115	3 343	2 900	2 650	-250	-9%	16
Austria	1 737	2 814	2 125	2 392	1 999	2 350	351	18%	17
New Zealand	1 900	2 350	1 940	2 484	3 204	2 350	-854	-27%	18
Serbia*	2 382	2 244	2 175	2 306	2 332	*2 332*	0	0%	19
Bulgaria	1 224	1 237	1 442	1 755	747	1 538	791	106%	20
Moldava *	840	1 520	1 470	2 570	1 630	*1 630*	0	0%	21
Georgia*	1 034	1 108	830	997	1 134	*1 134*	0	0%	22
OIV World Total(3)	**264 188**	**267 803**	**258 211**	**292 218**	**270 234**	***275 665***	**5431**	**2%**	

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

(2): OIV estimate based on UDSA info

(3): OIV estimate: mid-range estimate. Range for evaluation of 2015 world production: from 270.75 mhl to 280.7 mhl.

* 2015: 2014 data used as provisional figures

2. Asessment of world consumption levels

World consumption levels

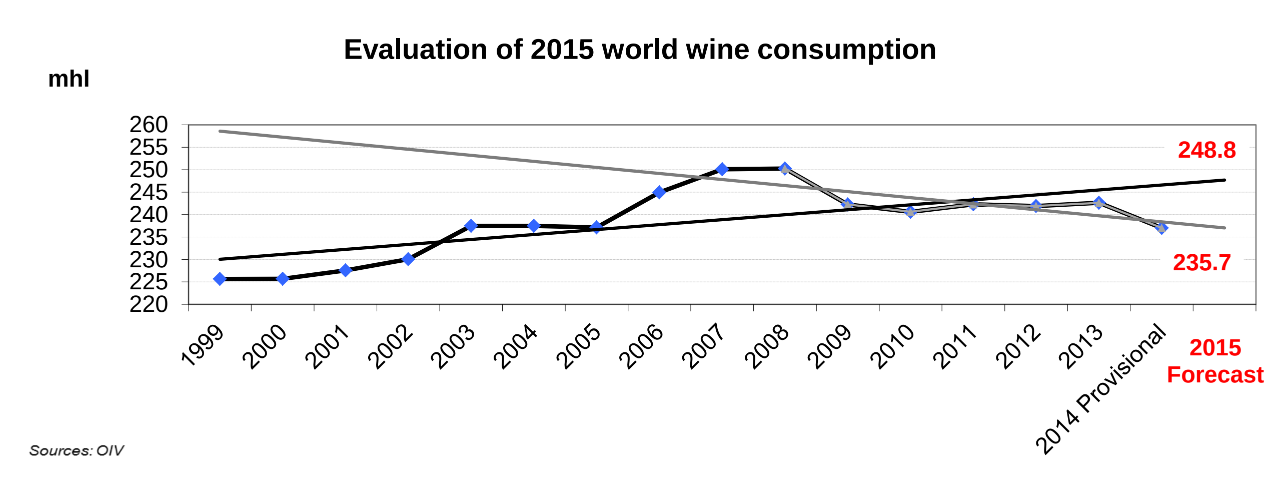
At this time of year, there is not yet any consolidated information on the consumption levels of the different markets.

Here, therefore, we resort to a projected level of world consumption from the start of the century with two scenarios (Figure 2). One of the two scenarios considered is based on the long-term resumption of the positive development of world consumption since the start of the century, while the second is based on the regressive development of this market since the 2008 economic crisis.

These changes have resulted in **2015 global wine consumption levels ranging between 235.7 and 248.8 mhl**.

There is also a continuing internationalisation of markets.

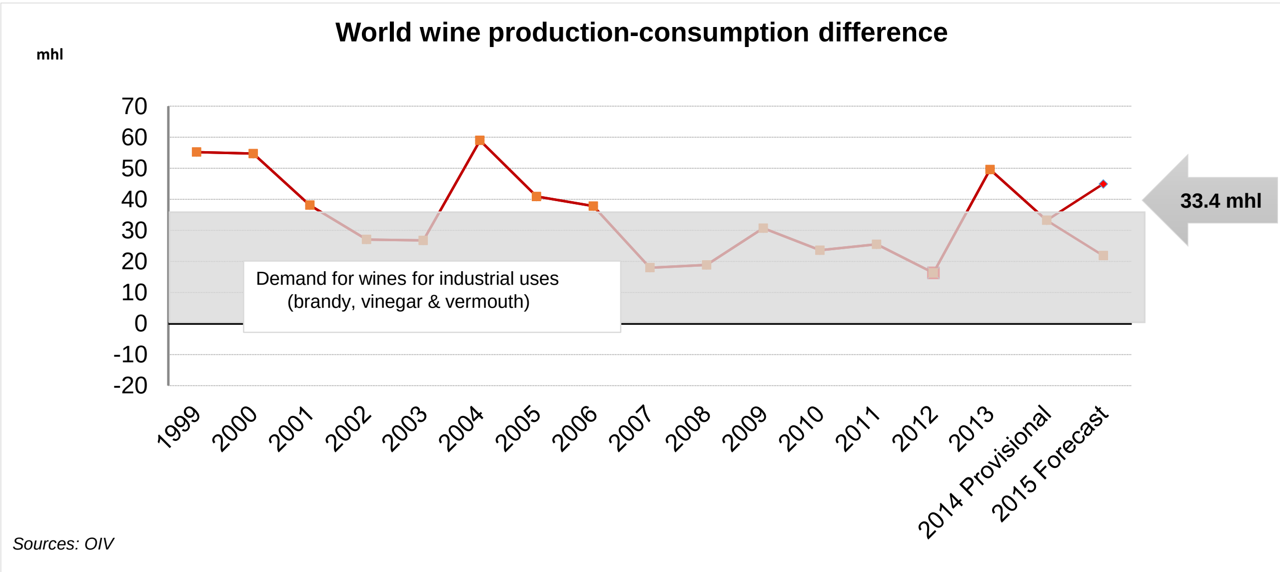
Figure 2 – **World wine consumption trends**



Therefore, if we use an evaluation of 2015 world wine consumption levels of between 235.7 and 248.8 mhl, we can then delimit the magnitude of the "**production-consumption**" **difference**[2].

This year, as for the previous year also, balance was achieved in the market. 2015 production should guarantee that both consumption and the demand for wines for industrial uses (brandy, vinegar and vermouth) are covered.

Figure 3 – **Degree of balance in the wine market**



[2] This difference does not completely amount to a surplus, given industrial needs.