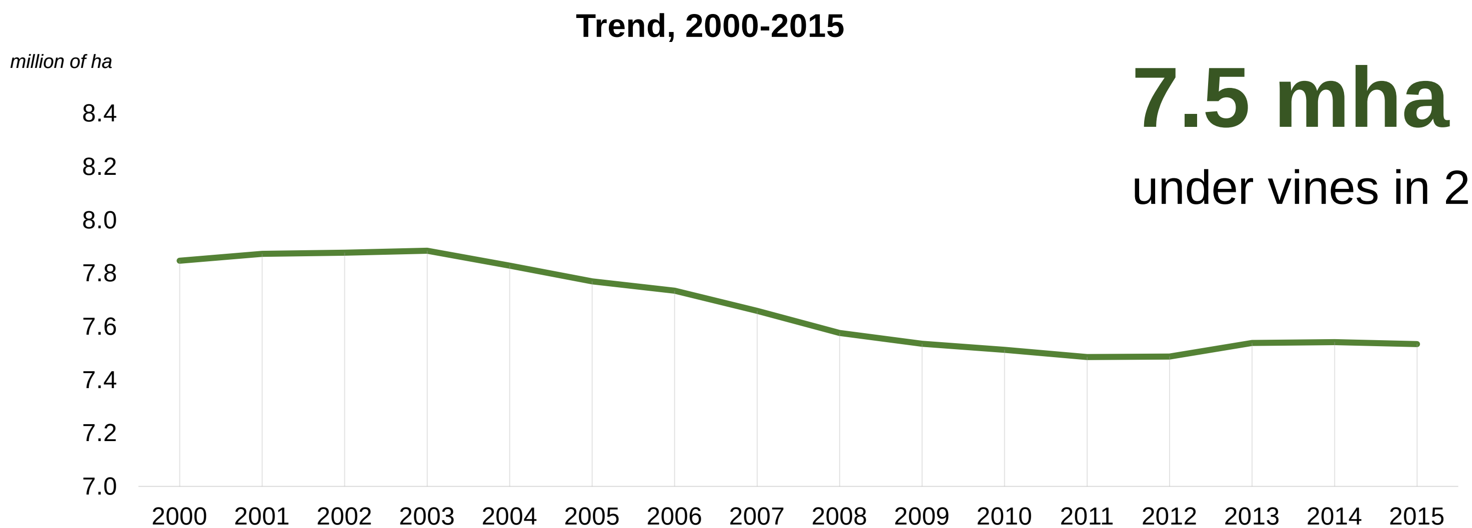
World vitiviniculture situation

- **Surface area**
- **Grape**
  - *Global grape production*
- **Wine**
  - *Production*
  - *Consumption*
  - *Trade*
- **2016 FAO-OIV Focus: Table and Dried Grapes**

Global area under vines

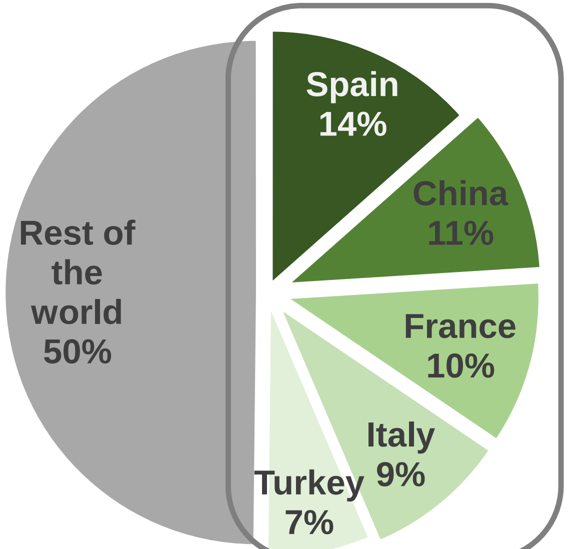
Area under vines in the world



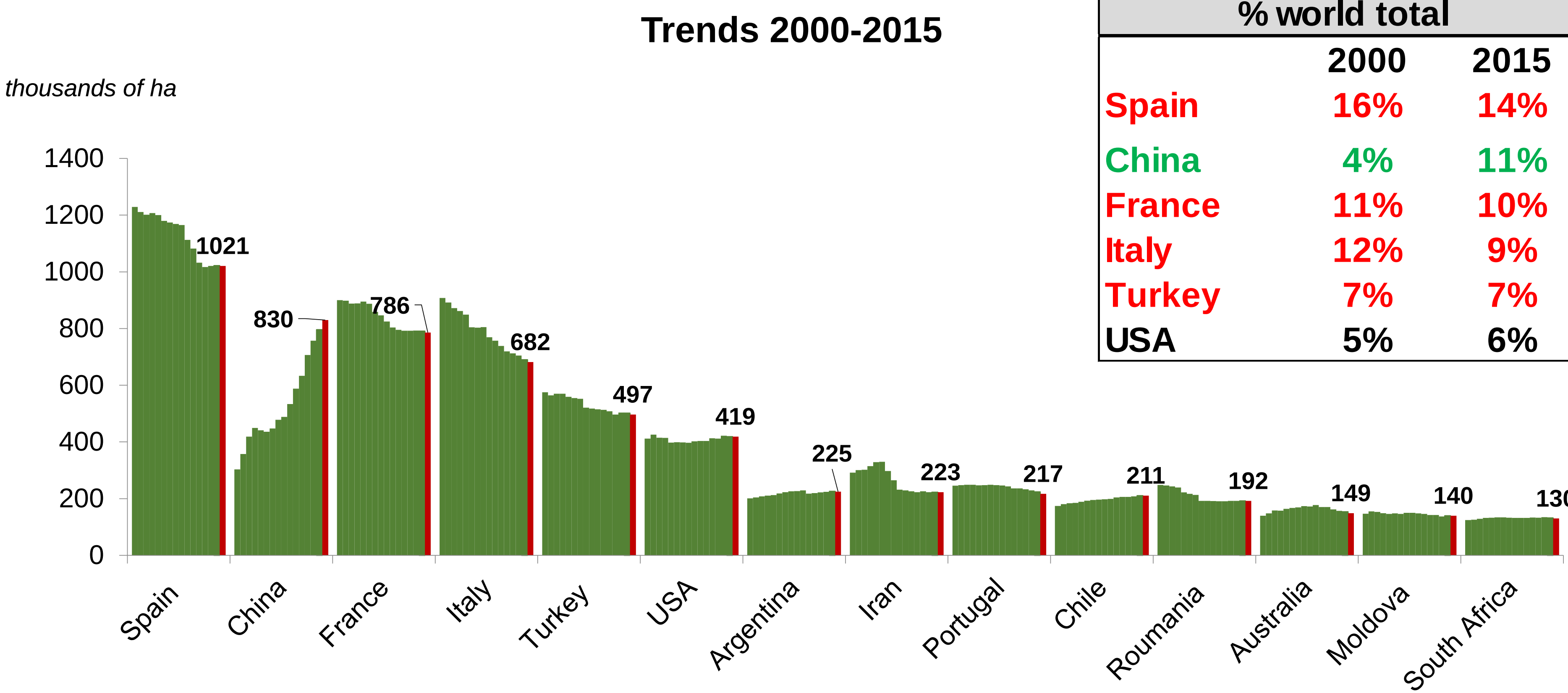
7.5 mha global area under vines in 2015

Share of countries in world area surface

5 countries represent **50%** of world vineyard



Area under vines



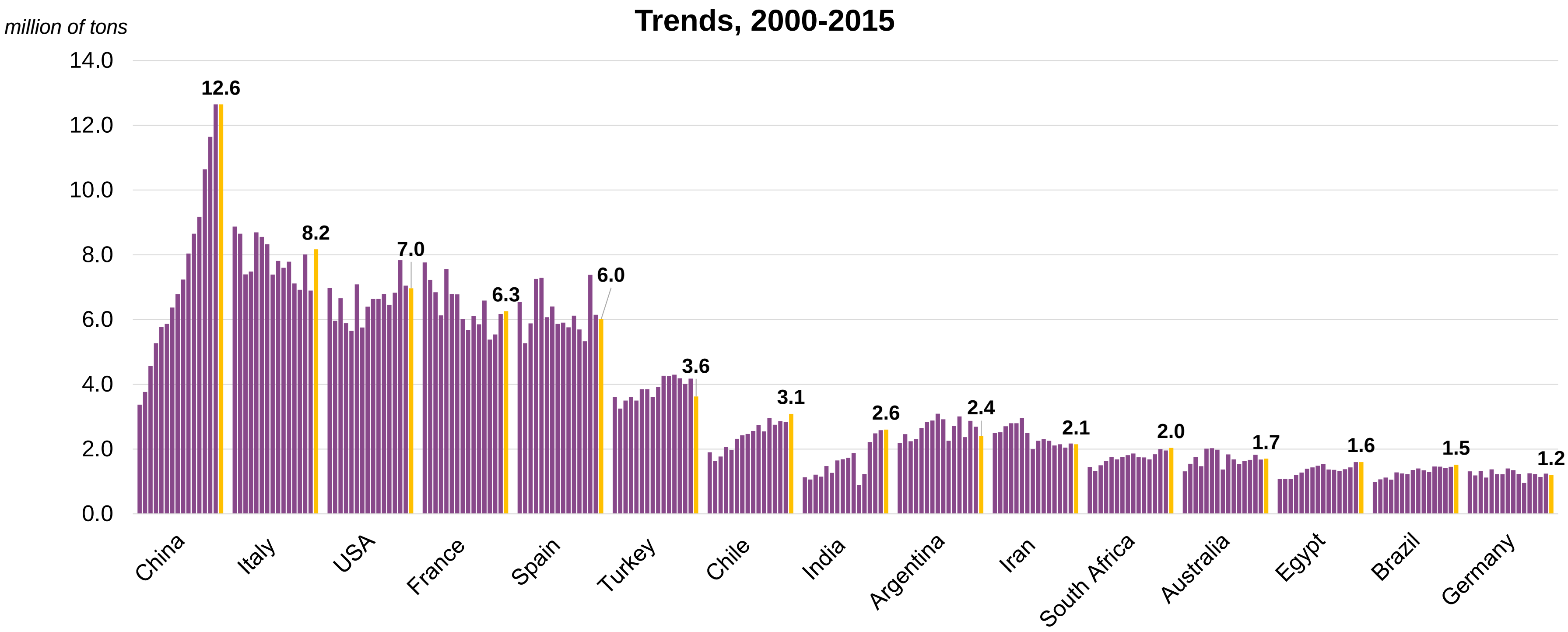
% world total		
	2000	2015
Spain	16%	14%
China	4%	11%
France	11%	10%
Italy	12%	9%
Turkey	7%	7%
USA	5%	6%

Since 2000 :

- Area under vine is **decreasing** in Europe, Turkey and Iran
- **Strong increase for China**, which has now the 2nd world largest vineyard.
- **Stabilisation** in the USA and South Hemisphere countries

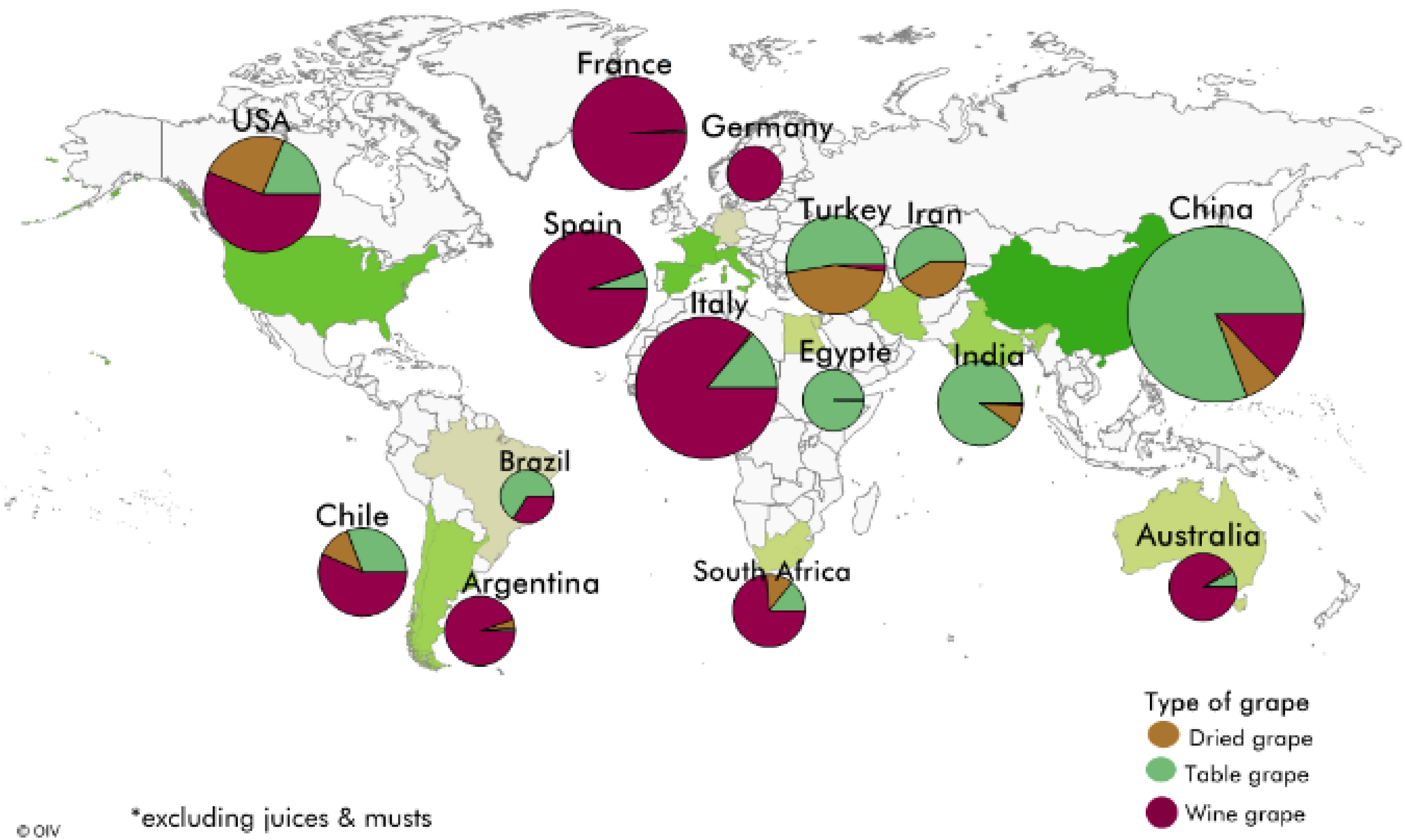
Grape

Major grapes producers: all use



- **Growth** in grapes production is particularly significant in China, India, USA and Chile
- **Decrease** in Italy, France, Spain and Iran.

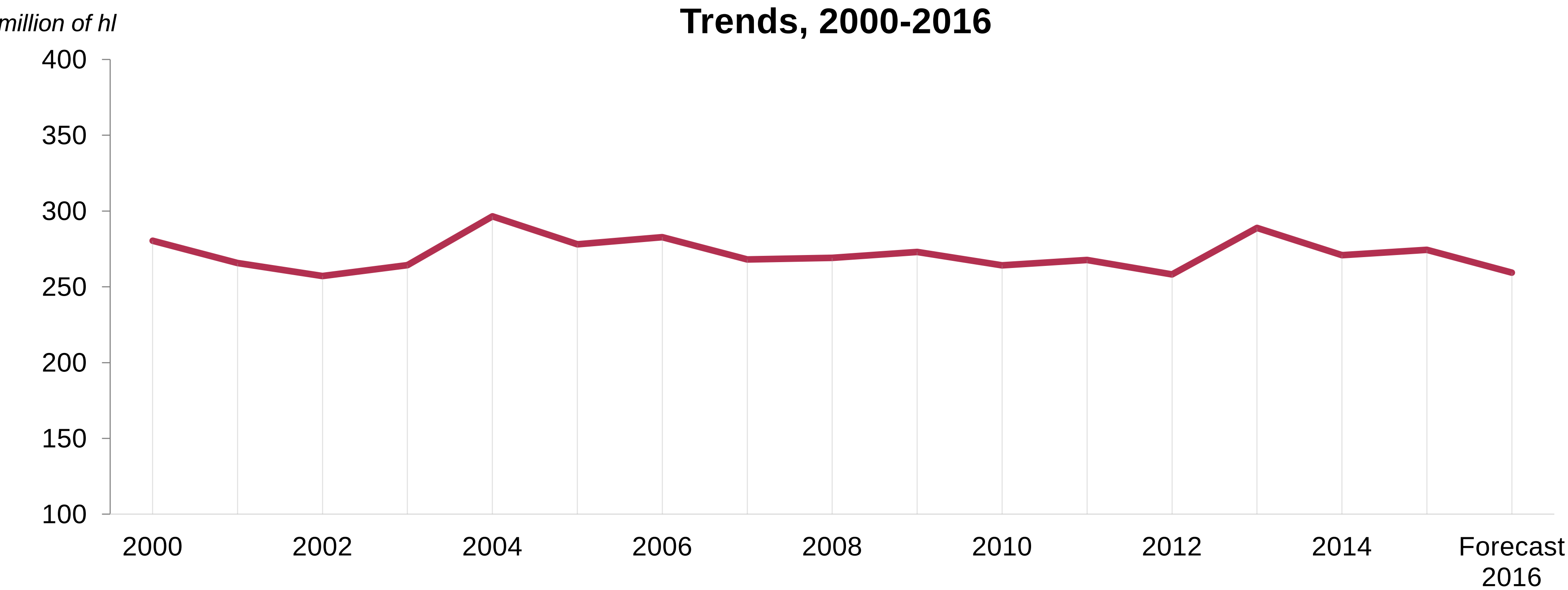
Major grape producers by type of products*



Wine production

World wine production

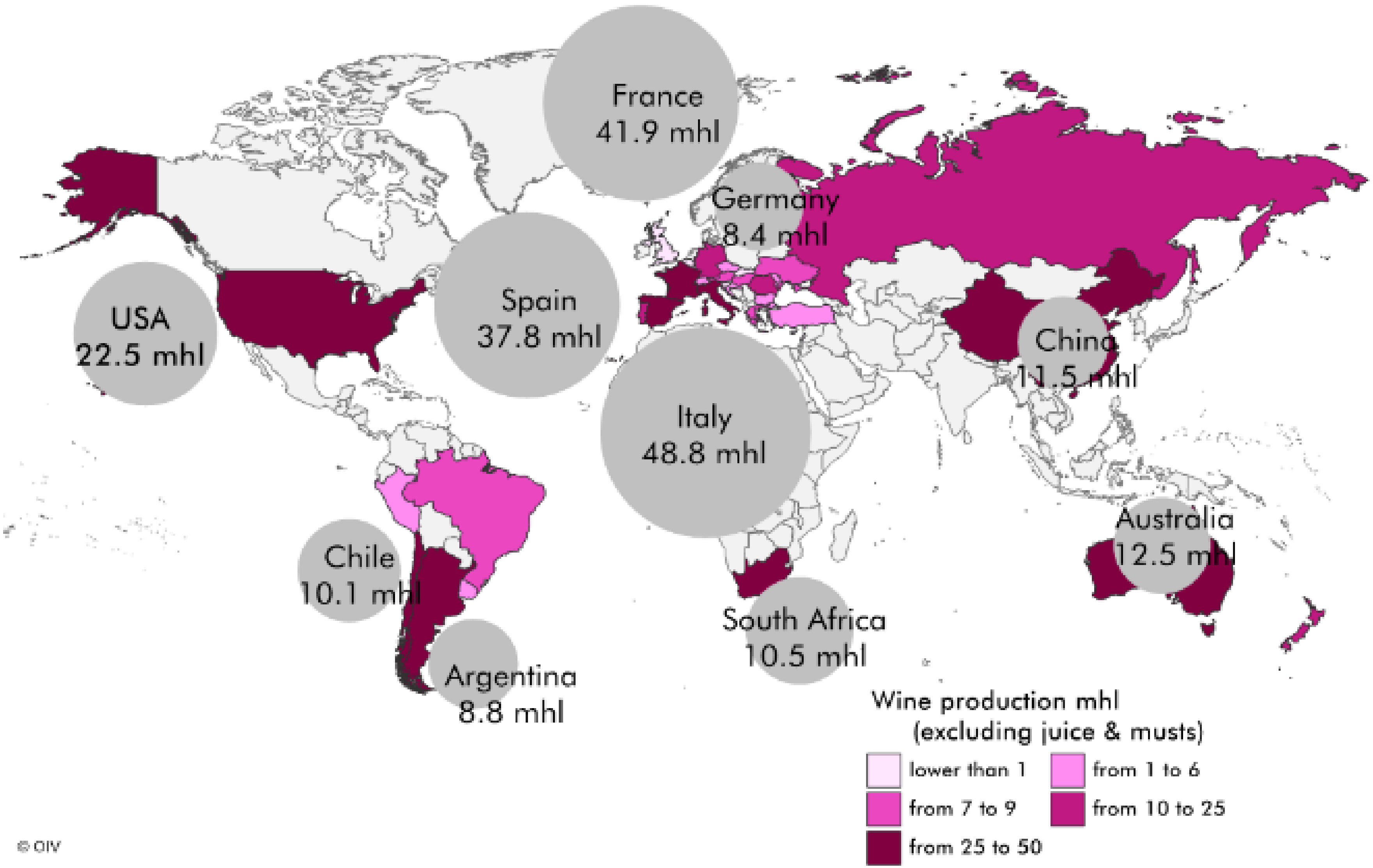
259 mhl global wine production in 2016



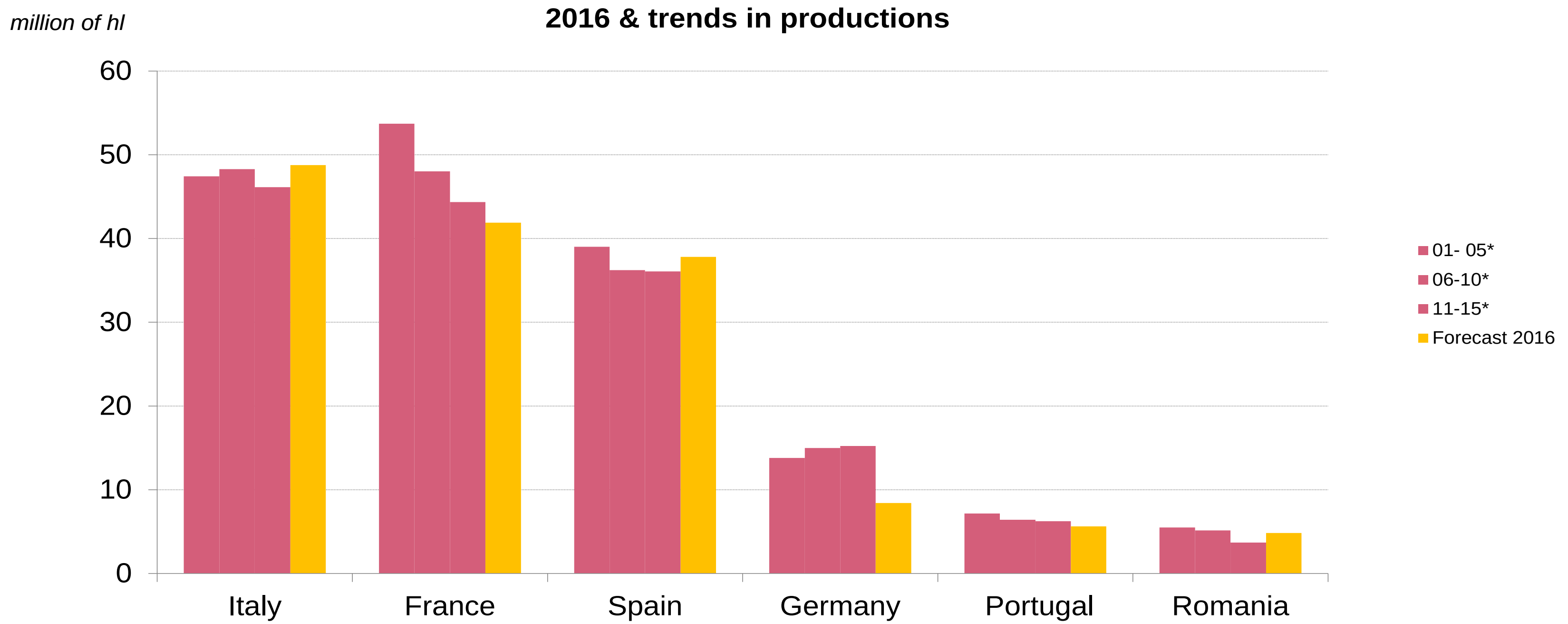
- **2016 world wine production** (excluding juice & musts) **decreased by almost 15 mhl** compared with 2015 production.

- production it's among one of the lowest production over the last 20 years.

Wine production in 2016



In Europe

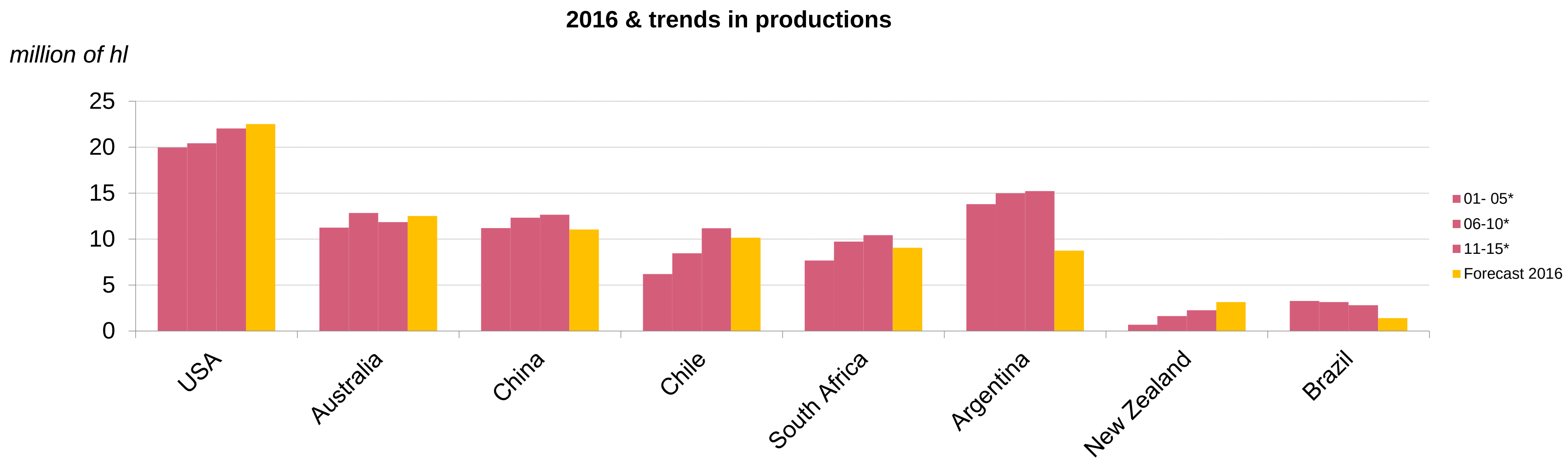


Annual trends in wine production:

- 2016 **production slightly higher** than the average for **Italy, Spain** and **Romania**
- **production lower** than the average in **France, Germany** and **Portugal**

** five-year average excluding minimum and maximum productions during the period*

Outside Europe



Annual trends in wine production:

- Production **above the average** of the previous years in the **USA, Australia, New Zealand**
- **Lower production** than the average in **Argentina**, **South Africa and Brazil**

** five-year average excluding minimum and maximum productions during the period*

Wine production

excluding juice and musts

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

Unit: mhl	2011	2012	2013	2014	2015 Provisional	2016 Forecast	2016/2015 Variation in volume	2016/2015 Variation in %	Ranking
Italy	42.8	45.6	54.0	44.2	50.0	48.8	-1.2	-2%	1
France	50.8	41.5	42.1	46.5	47.4	41.9	-5.7	-12%	2
Spain	33.4	31.1	45.3	39.5	37.3	37.8	0.5	1%	3
United States	19.1	21.7	23.6	23.7	22.1	22.5	0.5	2%	4
Australia	11.2	12.3	12.3	11.9	11.9	12.5	0.6	5%	5
China*	13.2	13.8	11.1	11.1	11.5	11.5	0.0	0%	6
South Africa	9.7	10.6	11.0	11.5	11.2	10.5	-2.2	-7%	7
Chile	10.5	12.6	12.8	10.5	12.9	10.1	-2.7	-21%	8
Argentina	15.5	11.8	15.0	15.2	13.4	8.8	-4.6	-35%	9
Germany	9.1	9.0	8.4	9.2	8.8	8.4	-0.4	-4%	10
Portugal	5.6	6.3	6.2	6.2	7.0	5.6	-1.4	-20%	11
Russia*	7.0	6.2	5.3	4.9	4.9	4.9	0.0	0%	12
Romania	4.1	3.3	5.1	3.7	3.5	4.9	1.3	37%	13
New Zealand	2.4	1.9	2.5	3.2	2.3	3.1	0.8	34%	14
Hungary	2.8	1.8	2.6	2.6	2.9	2.7	-0.2	-6%	15
Greece	2.8	3.1	3.3	2.8	2.5	2.6	0.0	2%	16
Serbia*	2.2	2.2	2.3	2.3	2.3	2.3	0.0	0%	17
Austria	2.8	2.1	2.4	2.0	2.3	1.8	-0.5	-21%	18
Georgia*	1.1	0.8	1.0	1.1	1.7	1.7	0.0	0%	19
Moldova*	1.5	1.5	2.6	1.6	1.7	1.7	0.0	0%	20
Brazil*	3.5	3.0	2.7	2.7	2.8	1.4	-1.4	-50%	21
Bulgaria	1.1	1.3	1.8	0.8	1.3	1.3	0.0	1%	22
OIV World Total(3)	**267.7**	**258.1**	**288.9**	**270.8**	**274.4**	**259.5**	**-15.0**	**-5%**	

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

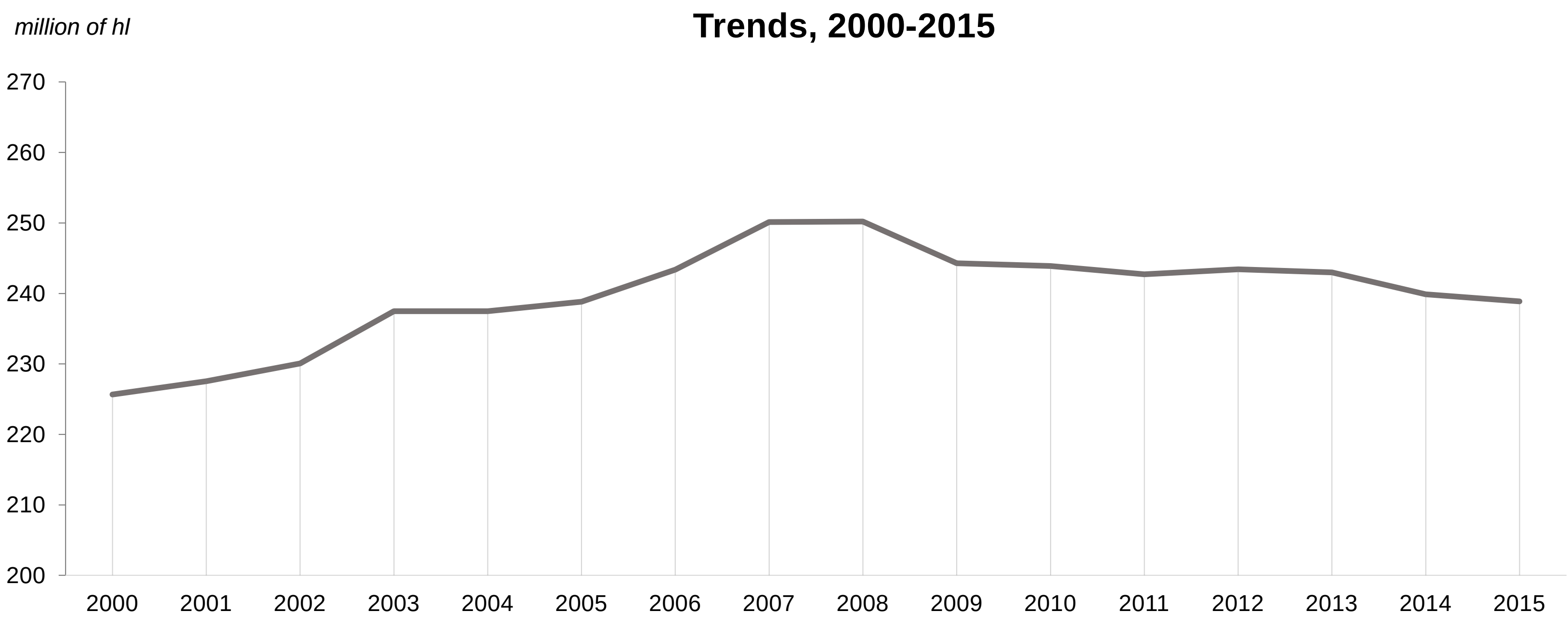
(3): OIV estimate: mid-range estimate Range for evaluation of 2016 world production: from 255.0 mhl to 264.0 mhl.

* Report for the year 2015, 2016 figures not yet available

Wine Consumption

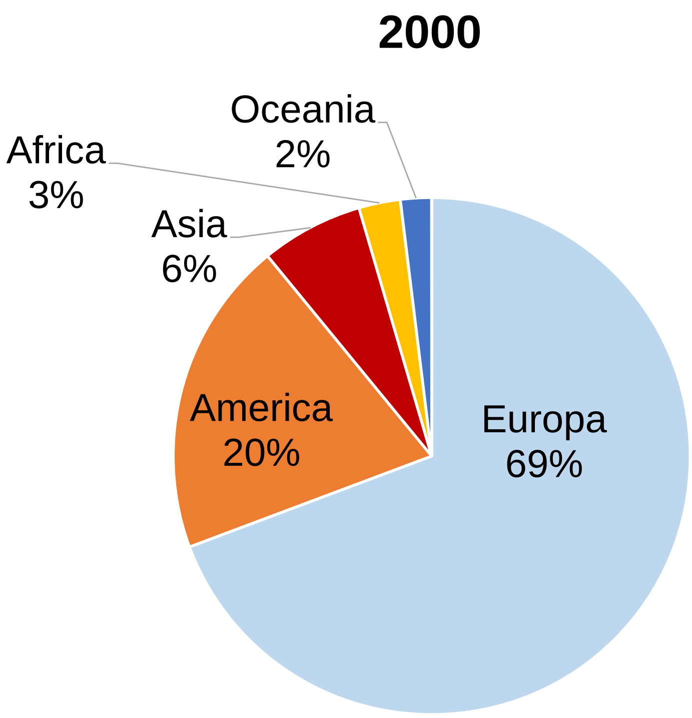
World wine consumption

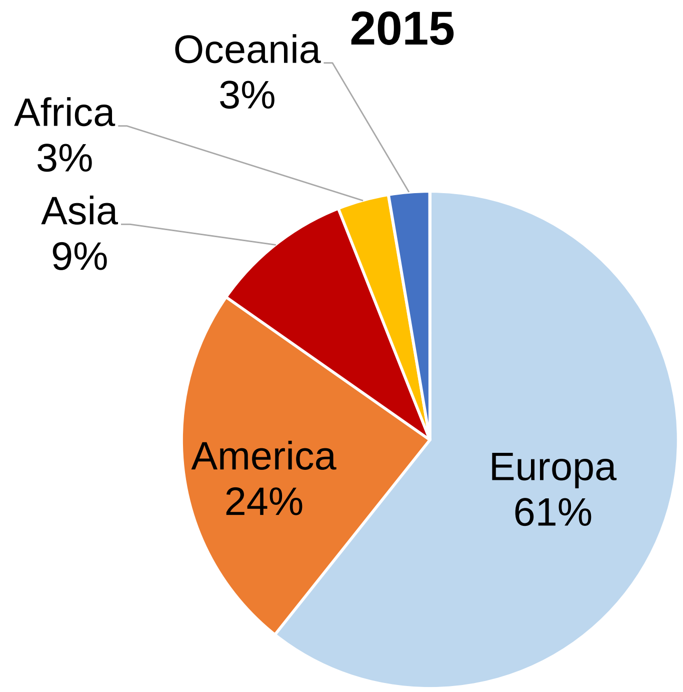
239 mhl world consumption of wine of grapes in 2015



Since the beginning of the economic and financial crisis of 2008, global consumption seems to have stabilised overall at around 240 mhl.

Shift in wine consumption geography

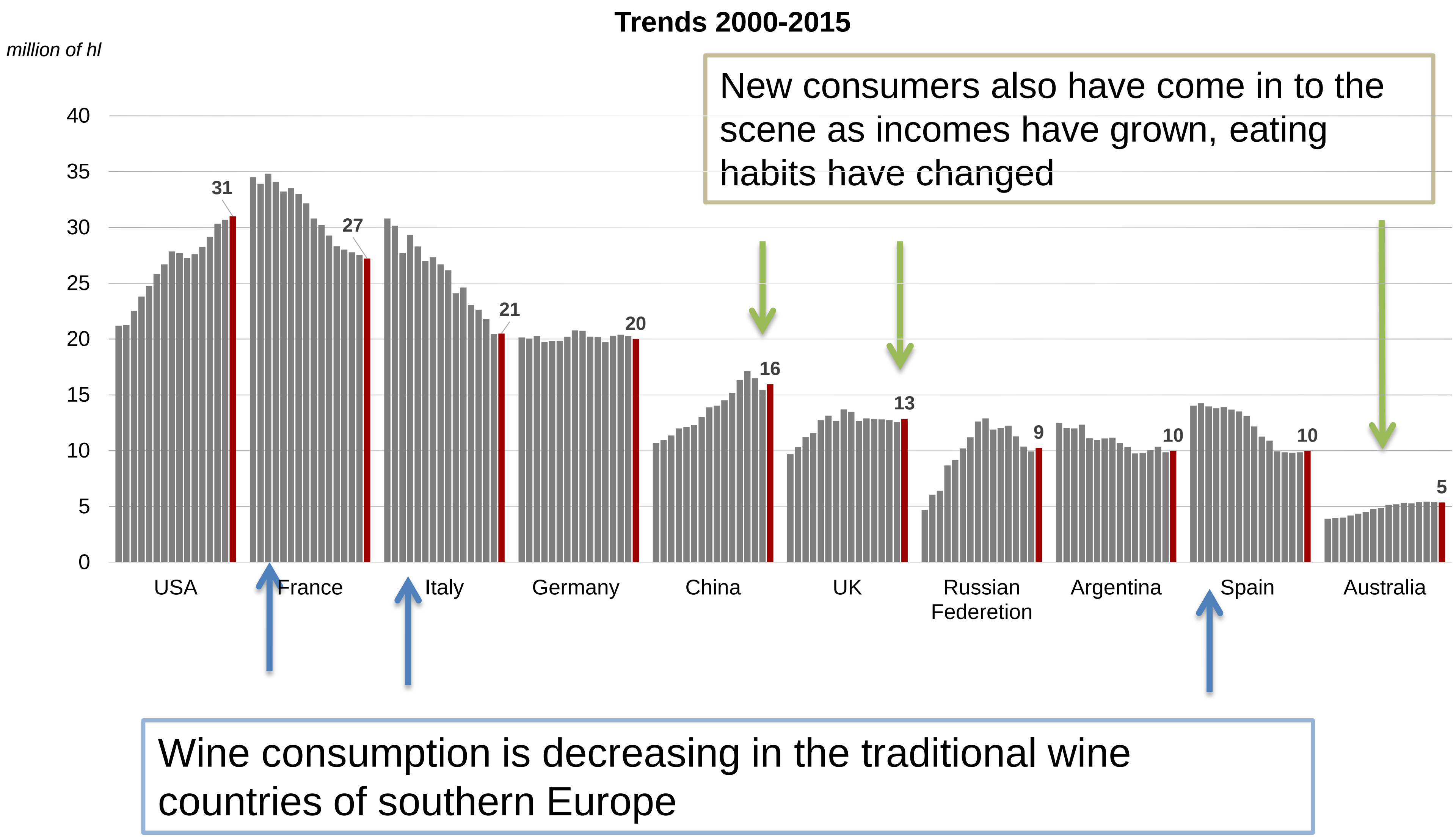




The 2000-2015 period has been characterized by a **shift in the wine consumption patterns**:

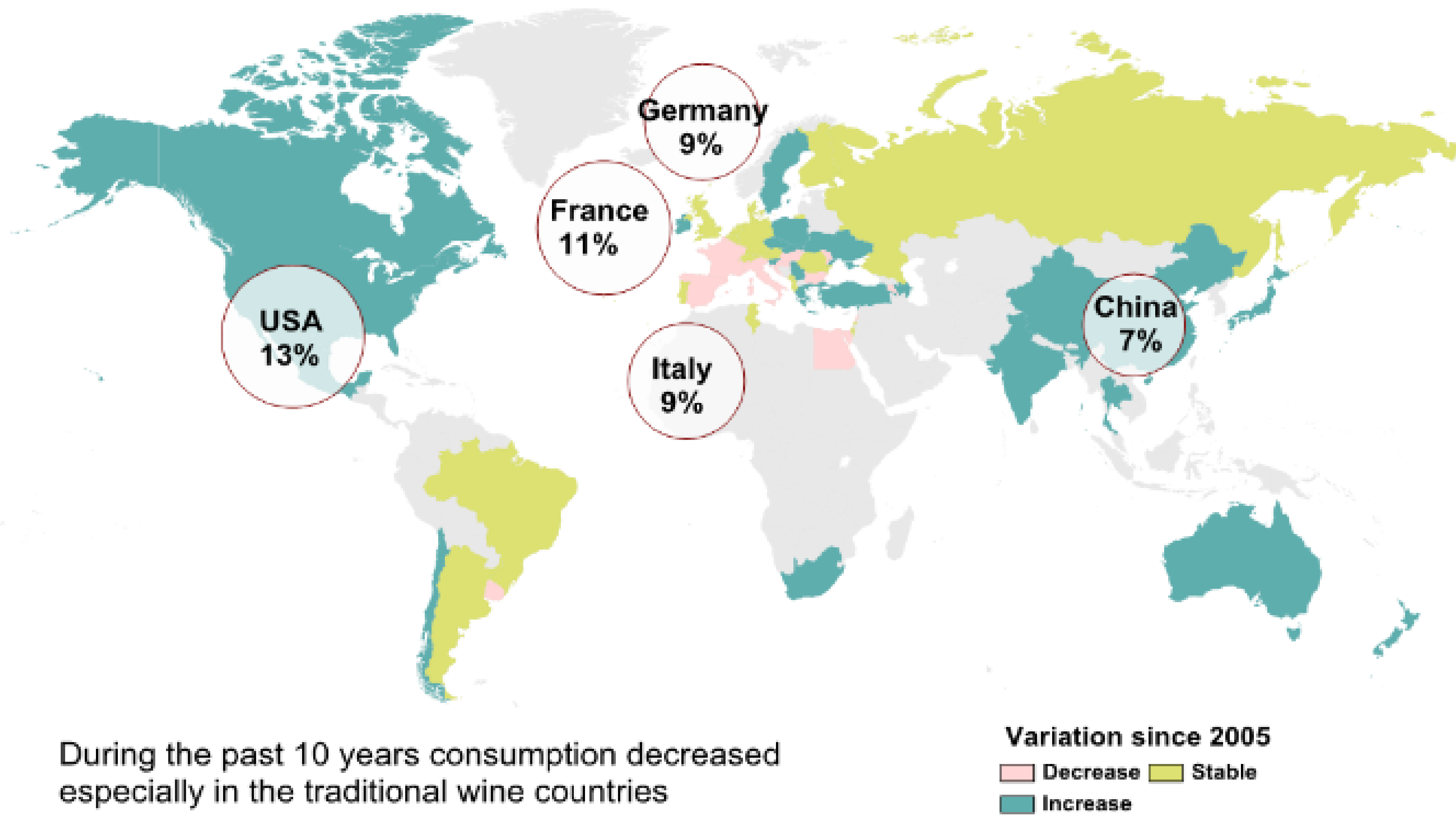
- Nowadays **39% of the wine is consumed outside of European countries**, compared with 31% in 2000.

Wine consumption



Wine consumption in the world

5 countries consume half of the wine of the world



During the past 10 years consumption decreased especially in the traditional wine countries

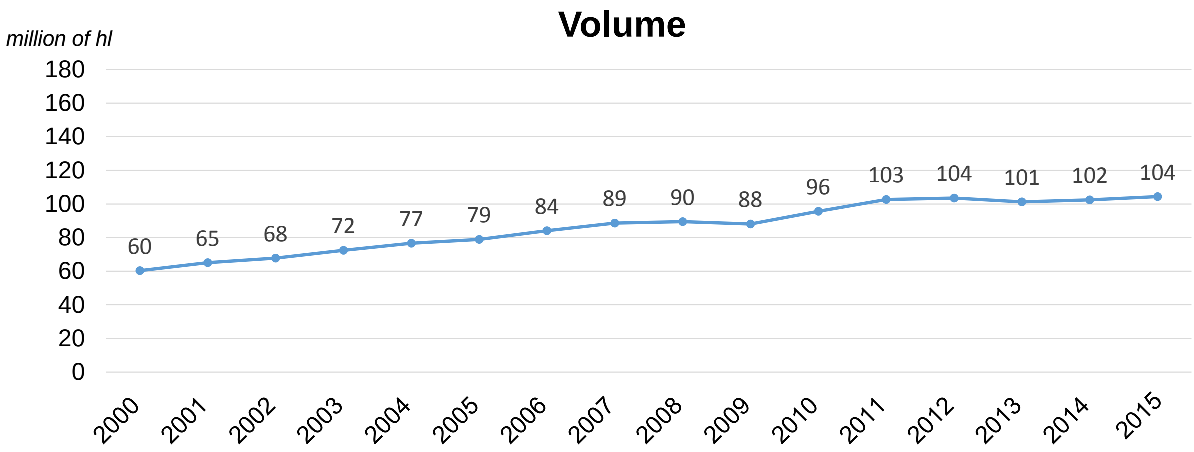
Wine trade

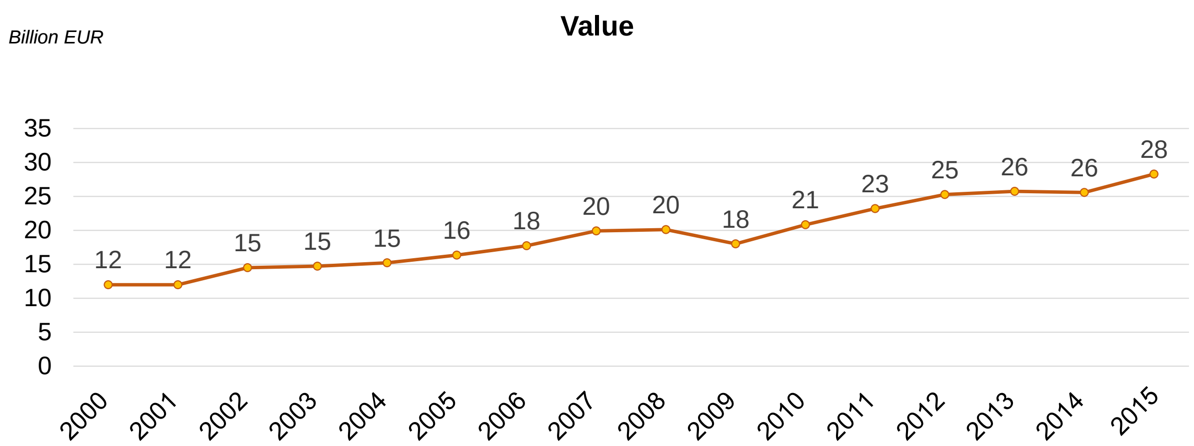
World wine Export

In 2015 **world wine export increased**

by 1.9% in volume **(104 mhl)**

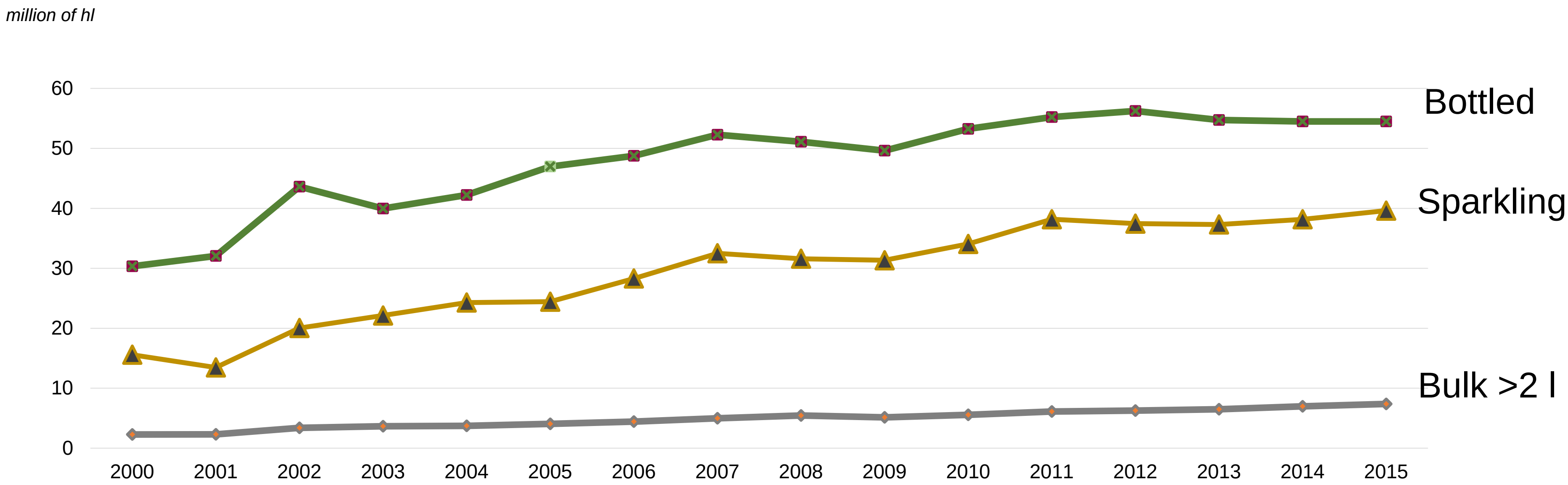
and by 10 % in value **(28 Billion EUR)**



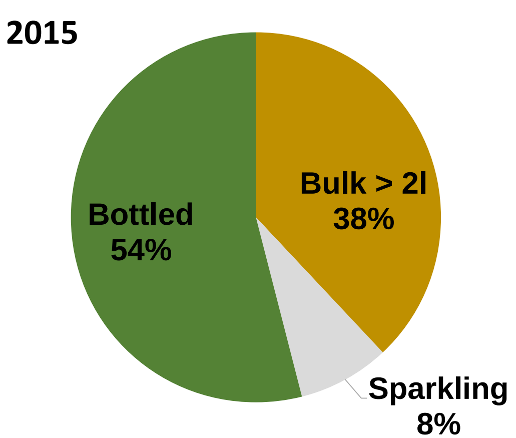


By type of product

Evolution of the exports by type of product in volume



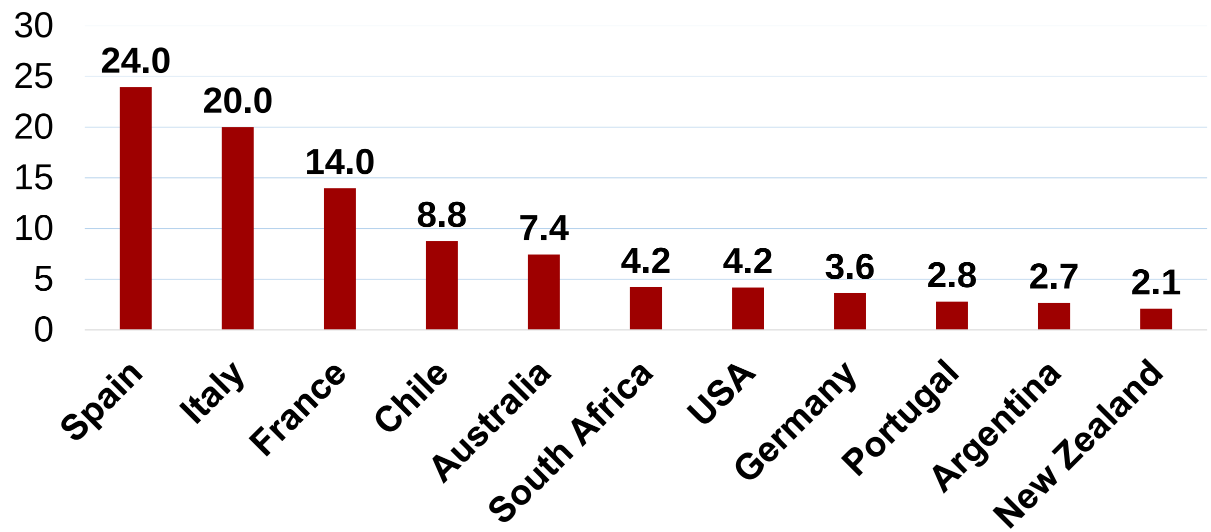
The composition of exports:



- <u>bottled wines</u> continue to decrease slightly in volume, but increase in value
- <u>sparkling wines</u> continue to increase in volume and in value
- <u>bulk wines</u> continue to increase in volume

Top world exporters

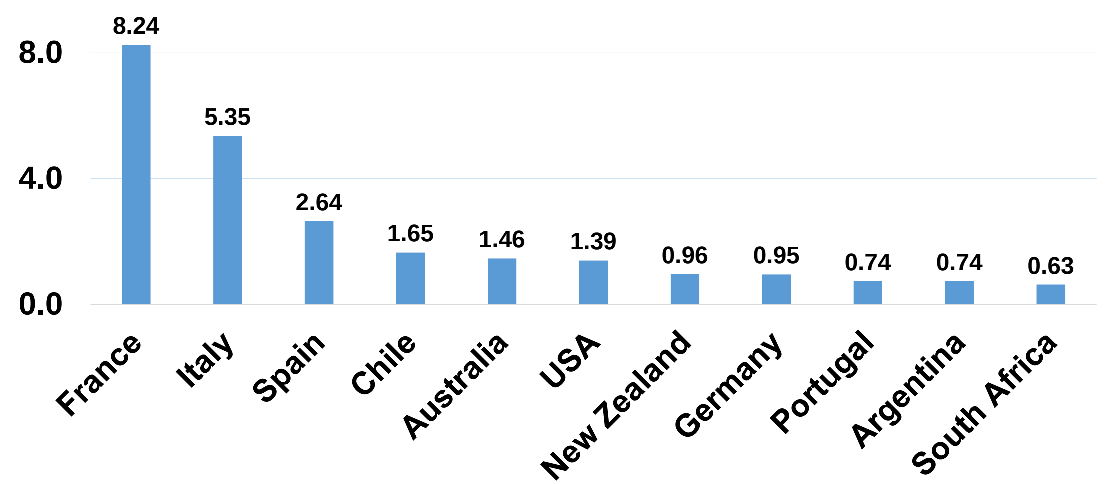
Millions of hectolitres in 2015



Export is widely dominated by Spain, Italy and France representing 56 % of the volume of the world market

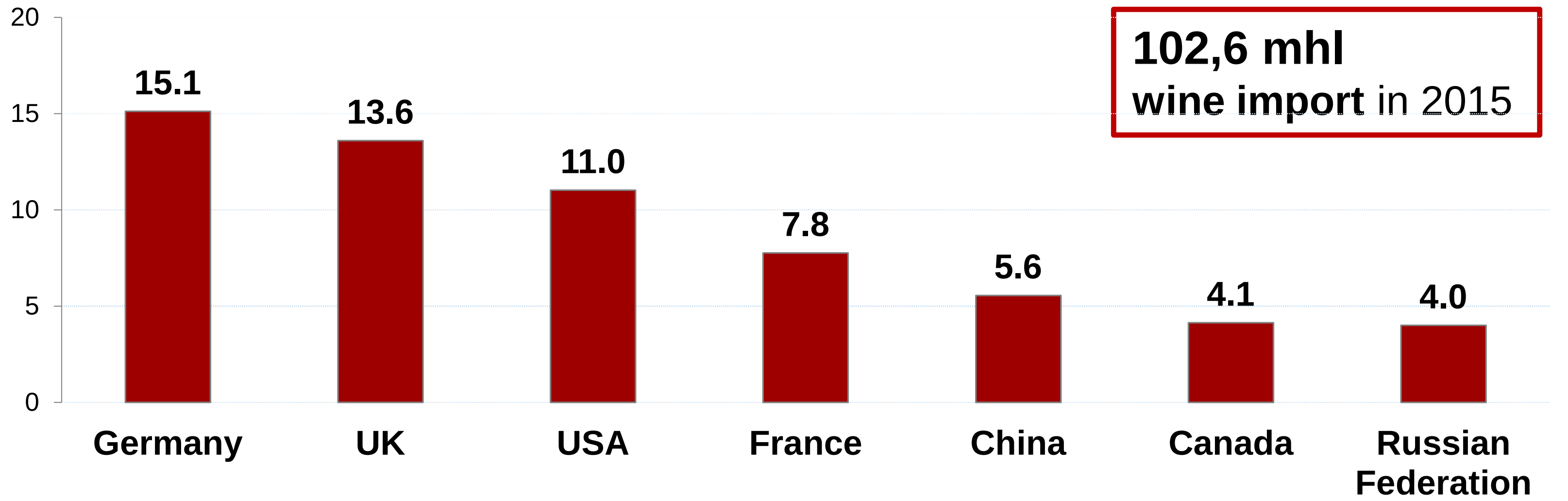
Billion of Euros in 2015

In value, France and Italy continue to dominate the market with respectively 29 % and 19 %



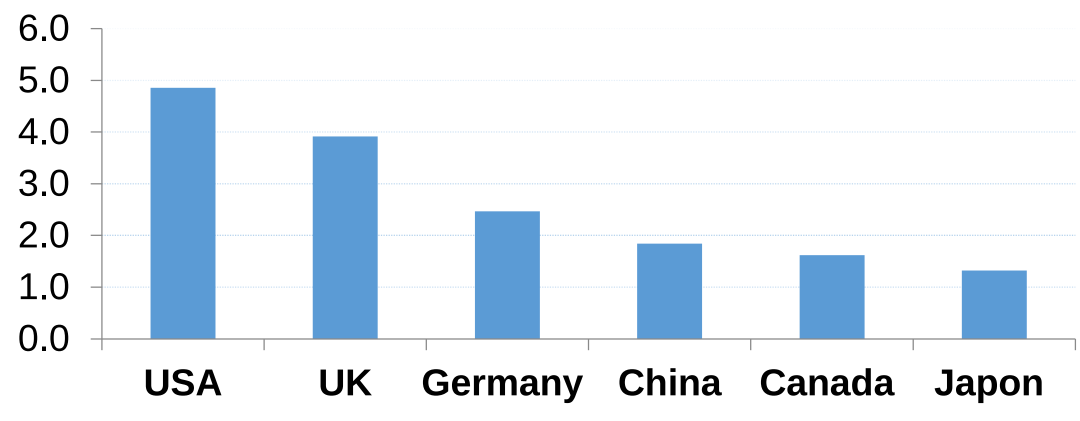
Top world Importers

Millions of hectolitres in 2015



102,6 mhl
wine import in 2015

Billion of Euros in 2015

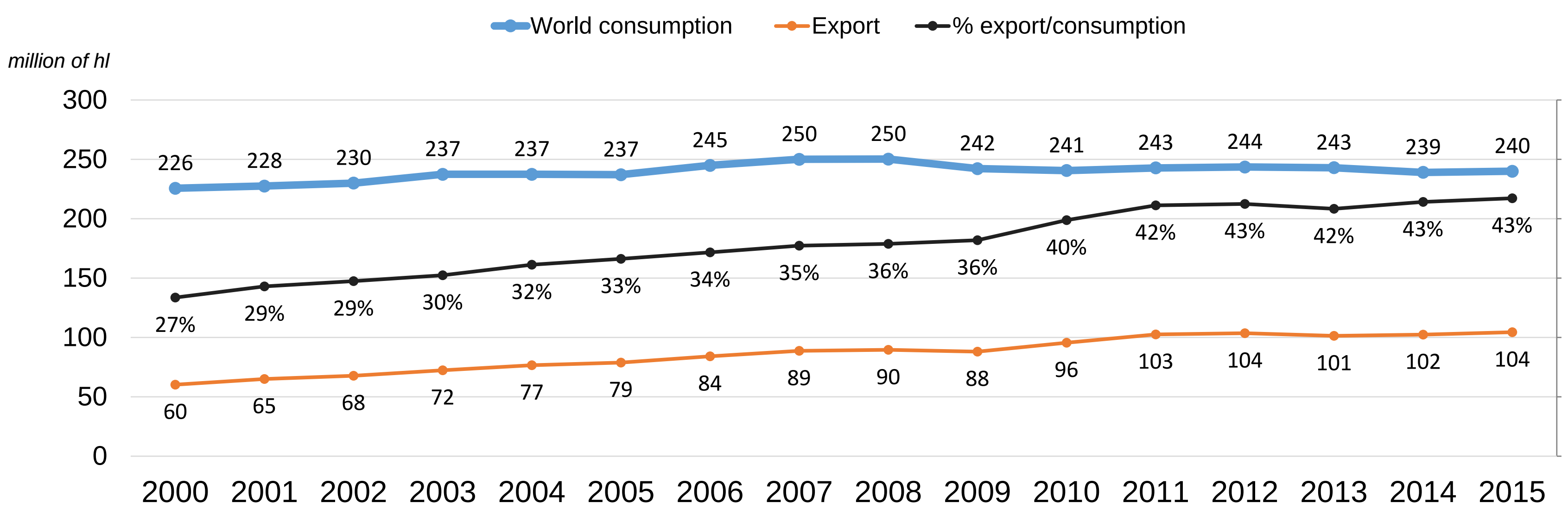


The top 5 importers in value represent more than 50%

Structure of world wine market

In 2015:

- **World production: 274,4 mhl**
- **Global consumption: 240 mhl**
- **Total export**: **104,3 mhl** (43% of global consumption)



- **Progressive increase of the “international wine”** (wine traded internationally) versus wine consumed domestically
- **wine is less and less consumed in its producing country**

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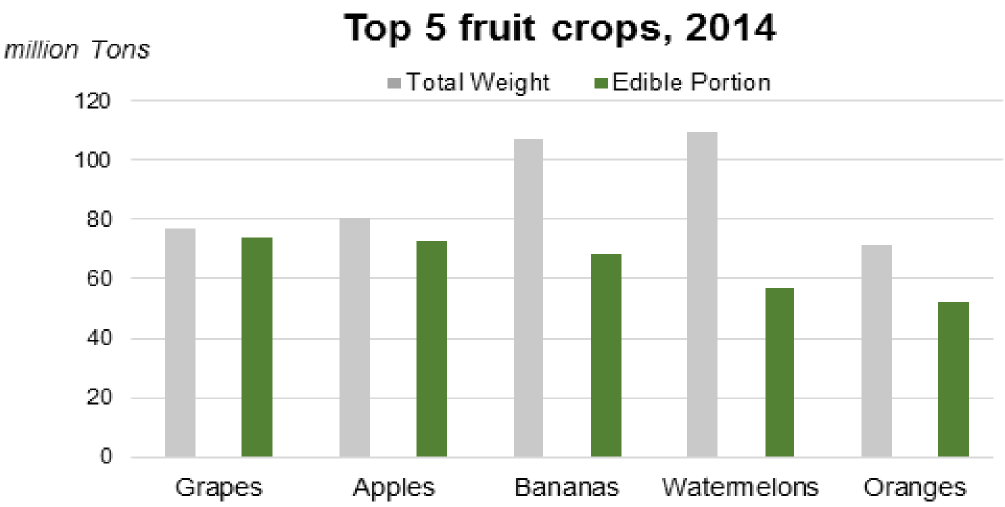
FAO-OIV Focus 2016:

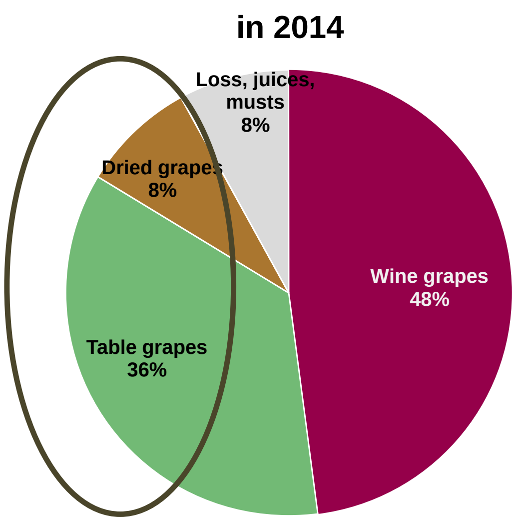
Table and Dried Grapes

Why this report?

Grapes are one the world's largest fruit crops



Approximately **44% of unpressed grapes** while 48% is used for wine



Given the importance of grape production

and the fact that fermented products only represent a partial share of grape consumption, **there is a real need to gain a clearer picture of trends** and patterns in the international grape economy

- **FAO with FAOSTAT**, the world's largest database of food and agricultural information, with more than a million statistics covering five decades and 245 countries and territories

- **OIV** the reference organization on vines, wine, wine-based beverages, table grapes, raisins and other vine-based products

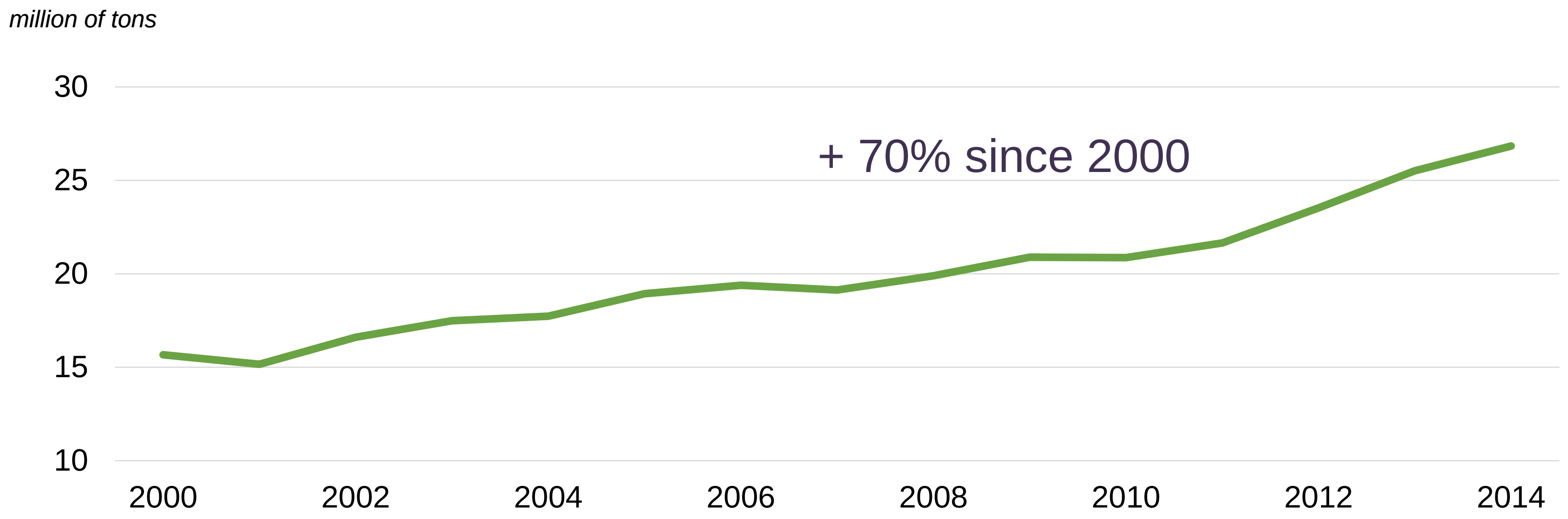
Content :

Section 1 general considerations of the basics of viticulture, food use of grape crops, and its nutritional aspects.

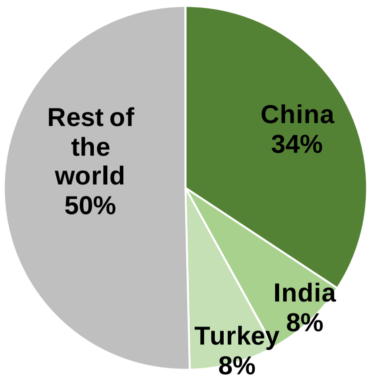
Section 2 provides an analyses of the table and dried grape market. It presents the latest data on production, consumption and imports.

Table Grapes

27 million of tons: world production in 2014



3 countries produce **50%**



- **China is a major contributor to the growth** of world production.
  Between 2000 and 2014, table grape production in China has multiplied by 7

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Table grapes production in 2014

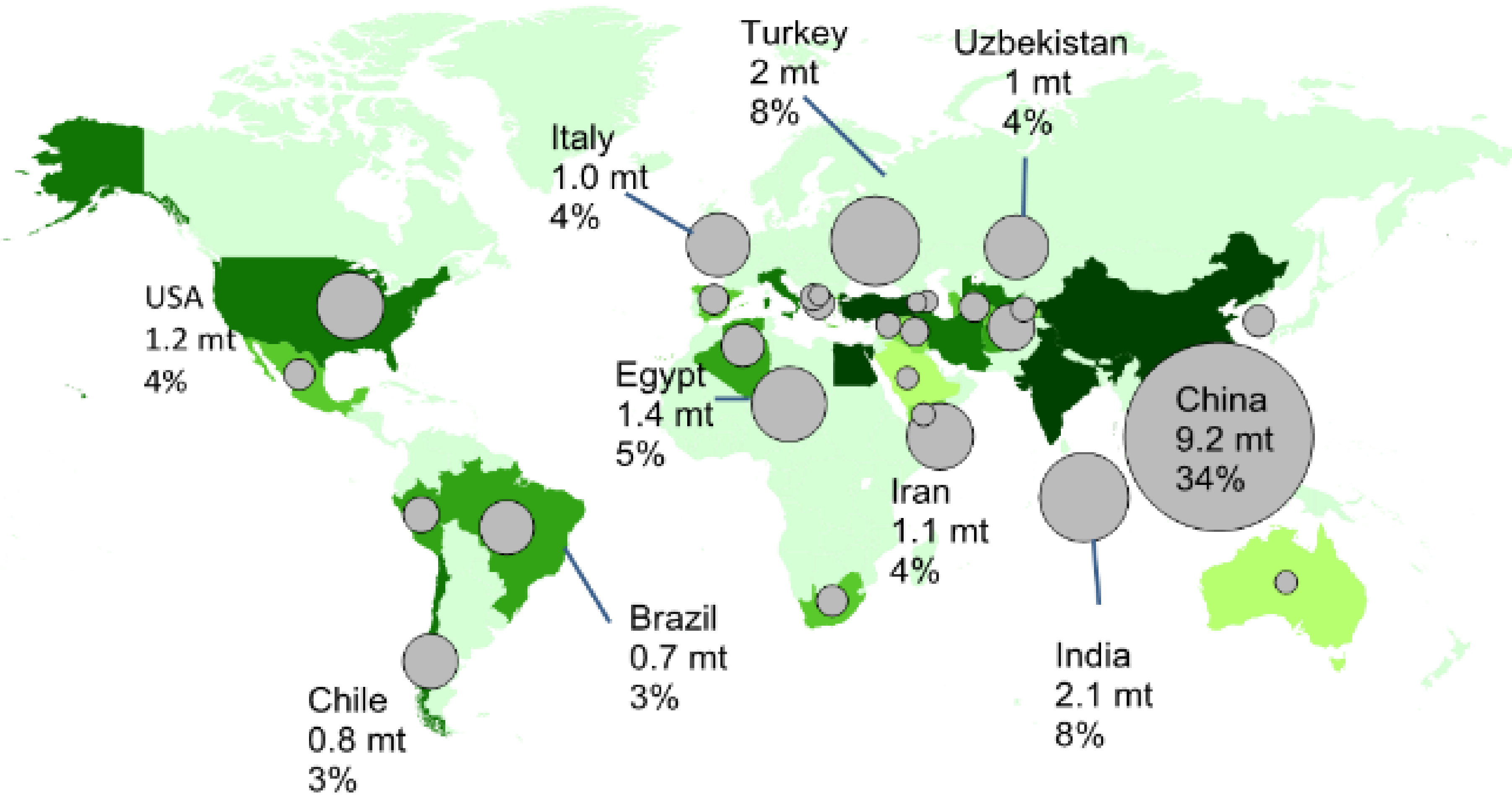
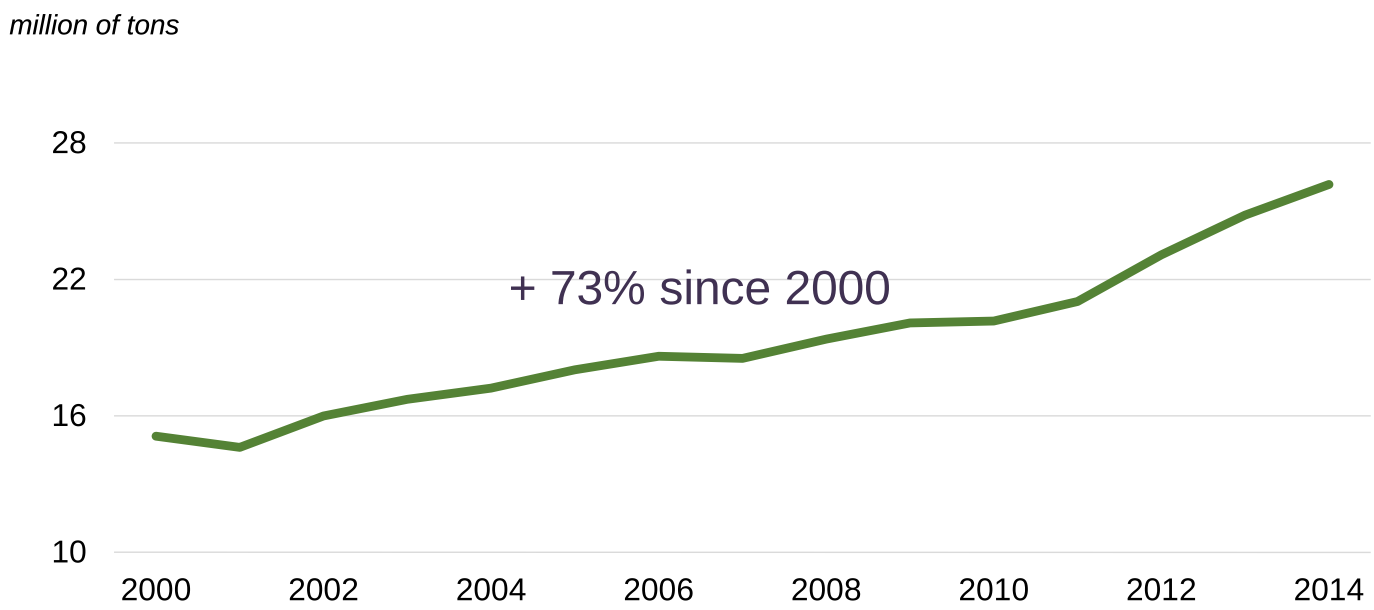
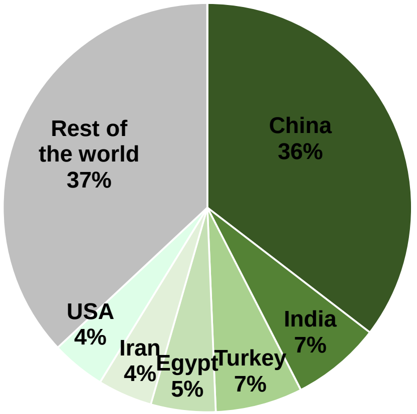


Table Grapes

26.2 million tons: world consumption in 2014



6 consume 63%



- **China** is the largest consumer (9 million tons) followed by India and the Turkey (with both a consumption of 1.8 million)

- **Grape consumption** is not only on the rise in these markets; there is clearly **growing interest** in this fruit **in Southeast Asian markets**.

Table Grapes

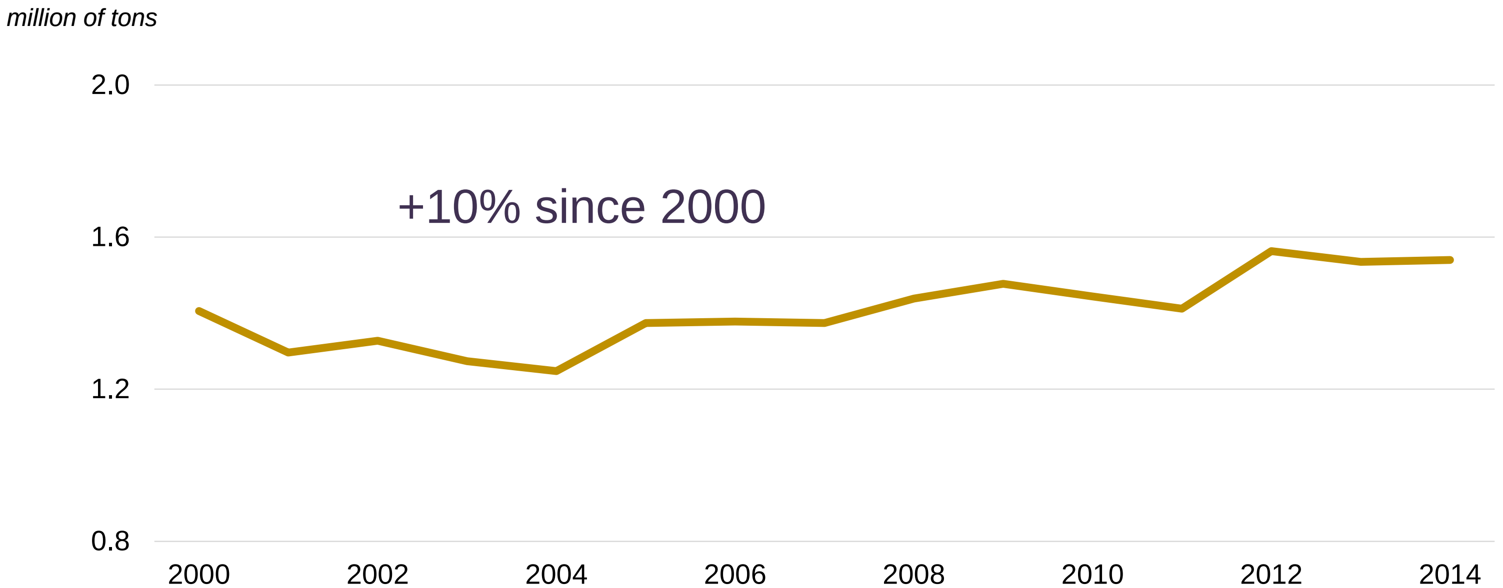
4.2 million tons: the world export in 2014

millions of tons

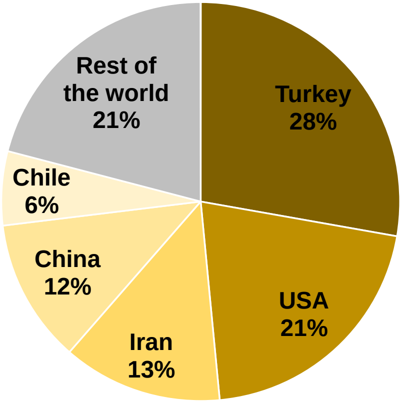
- **Table grape export has grown significantly**
- Growth was particularly driven by the emergence of **new players in table grape trade**, such as **South Africa and Peru**

Dried Grapes

1.5 million tons: world **production** in 2014

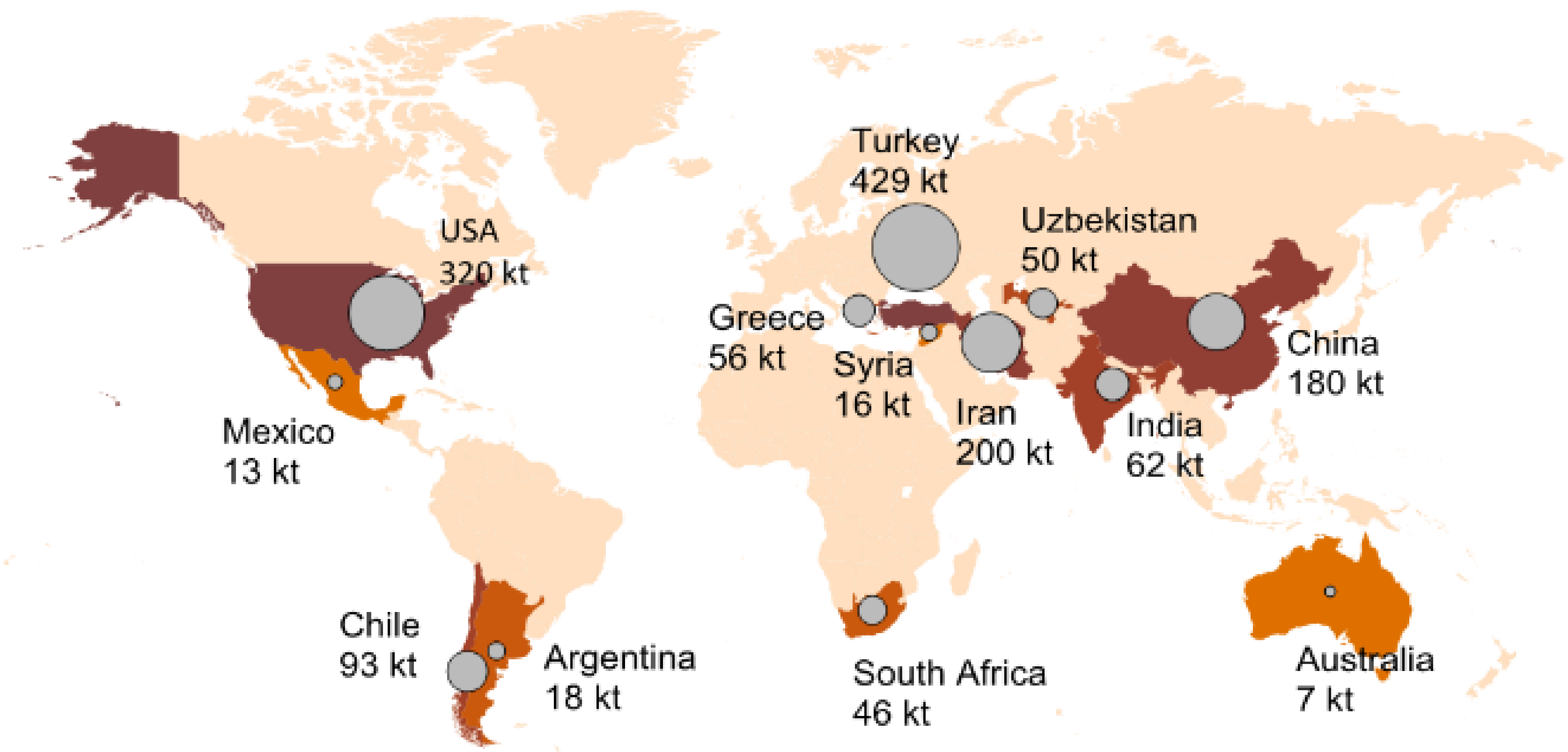


5 countries produce **80%**



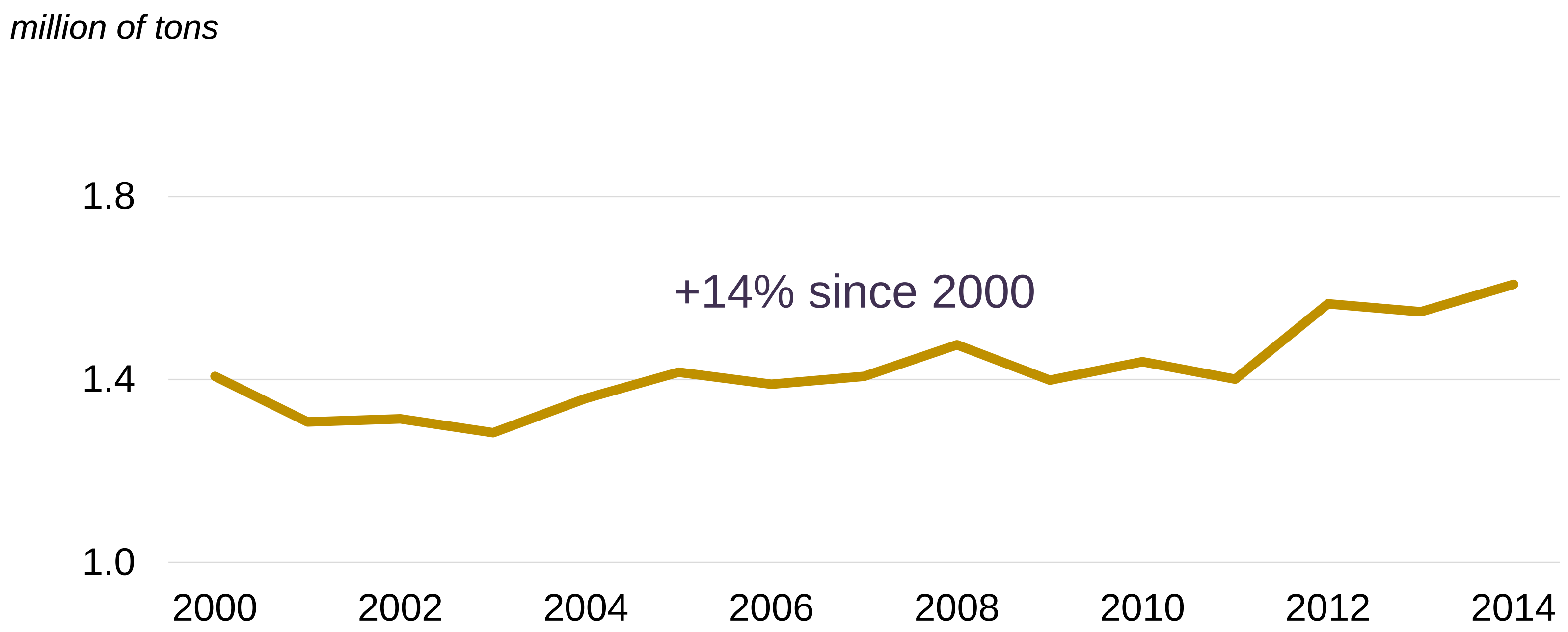
- Turkey and USA dominate global dried grapes production

Dried grapes production in 2014

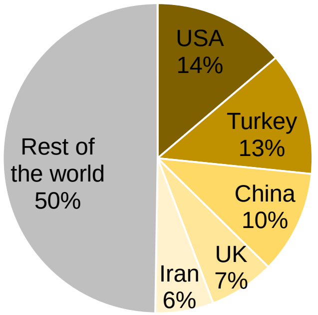


Dried Grapes

1.6 million tons: world **consumption** in 2014



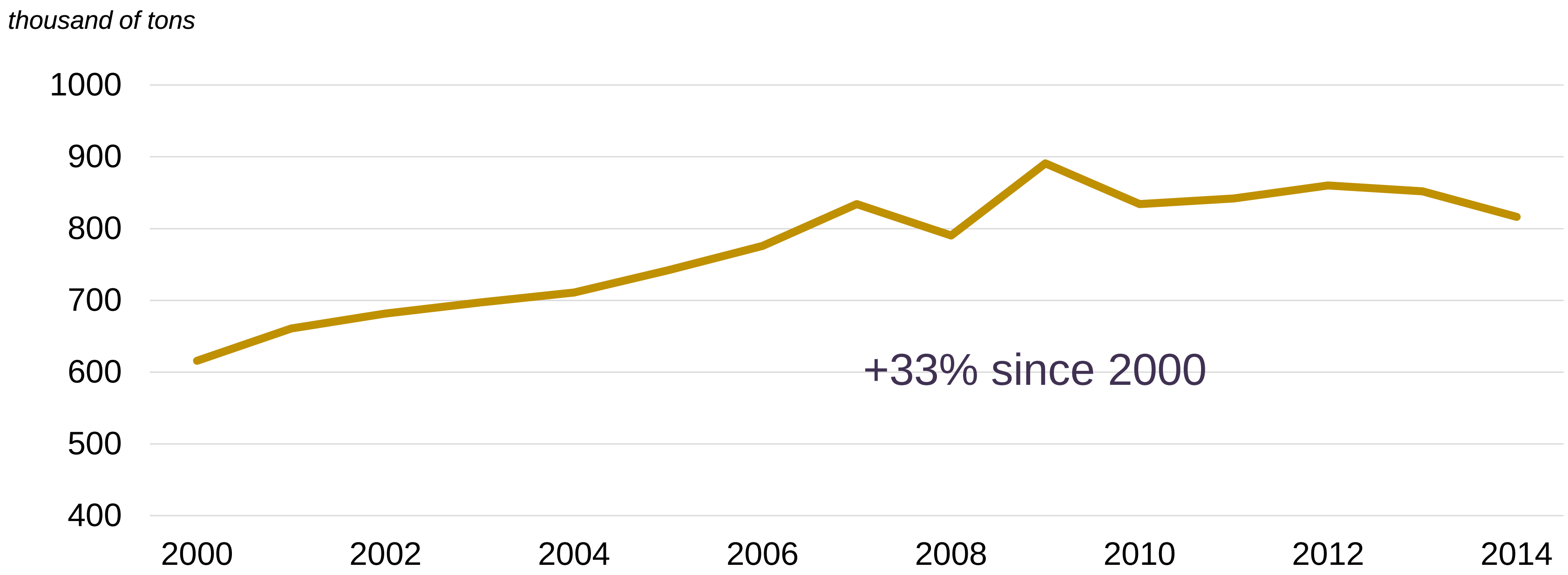
5 countries consume **50%**



- **USA** and **Turkey** are the **largest national markets**
- followed by **China** which **doubled its consumption** since 2000.

Dried Grapes

816 thousand tons world **export** in 2014



- **Turkey** is the **world's leading exporter**
- the **EU** is the **leading importer market**
- **India and China** are major producers, but **not yet major exporters**

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Future actions:

How to improve the data collection of this segment of the sector?

The statistical data currently available on the quantities of grape juice produced and on intermediate unfermented products do not enable us to analyse these segments of the sector in further details

Thank you for your attention

Vielen Dank für Ihre Aufmerksamkeit

Grazie per la Loro attenzione

Gracias por su atención

Merci de votre attention

Obrigado