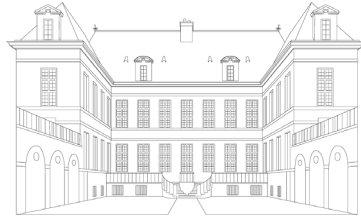




World Wine Production Outlook

OIV First Estimates
29.11.2024



OIV **100**

International Year of Vine and Wine 1924 • 2024



In 2024, world wine production is expected to decline further from the low volume of last year. Climatic challenges across both hemispheres are once again major contributors to the reduced global production volume.

KEY POINTS

Globally, 2024 appears to be a re-run of 2023 with a range of weather events affecting wine production volumes around the globe, exacerbated by economic and market circumstances. There have been relative changes in production between countries compared to the previous year, but the net result is a total production 2% lower than 2023.

Low production volume in the European Union is expected. France has recorded the most significant decrease in production compared to the previous year, largely due to challenging weather conditions across the country. Italy recovered slightly from 2023's very low volume, to become the largest world producer once again. Generally volumes across Europe were below average, with only Portugal and Hungary recording average or above average harvest volumes.

First forecasts from the USA indicate an average production volume for 2024, slightly below 2023 levels. In the Southern Hemisphere, wine production volumes are expected to remain low in 2024, again due mainly to climatic conditions, marking the lowest output in two decades.

Abbreviations:

mhl: millions of hectolitres



1 • World production

Based on comprehensive data from 29 countries representing 85% of global production in 2023, **world wine production for 2024 is estimated between 227 mhl and 235 mhl**, with a mid-range projection of 231 mhl. This forecast signals a 2% decline from the already low 2023 volume, and a drop of 13% reduction against the ten-year average. This positions 2024 production as potentially the smallest global output since 1961 (220 mhl).

In the **Southern Hemisphere**, key wine-producing nations experienced significant drops: Australia, Argentina, Chile, South Africa, and Brazil recorded production volumes between 4% and 21% below their five-year averages. The **European Union** presented an equally challenging landscape, with nearly all countries experiencing below-average harvest volumes.

France, the leading producer in 2023, experienced the largest fall in production, with its low output substantially influencing the worldwide wine supply. Only a small group of regions—notably the United States and several Eastern European countries including Hungary, Georgia, and Moldova—enjoyed more favourable climatic conditions, achieving average or above-average production volumes.

As with 2023, extreme or atypical meteorological events are the key influence on global production, with early frosts, heavy rainfall, and prolonged drought dramatically impacting vineyard productivity.

This underscores the wine industry’s increasing vulnerability to climate variability, highlighting the urgent need for adaptive strategies and resilient viticultural practices in the face of escalating environmental uncertainties.

At the same time, a second consecutive year of reduced production, occurring within a market context of decreasing global consumption and high inventory levels, could contribute to a market equilibrium mitigating the immediate economic impact of reduced production for some regions or producers.

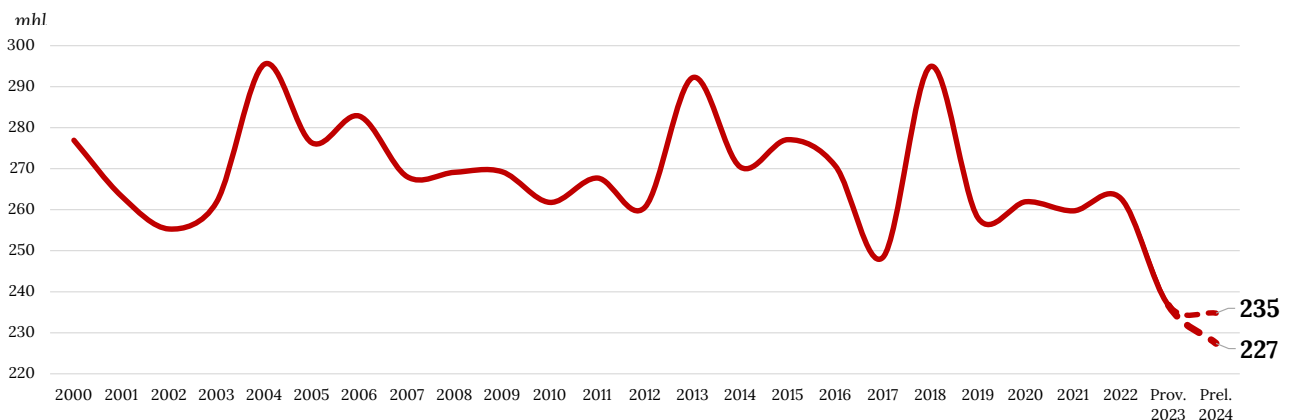
2 • Northern hemisphere

2.1 • European Union (EU)

In the **European Union (EU)**, wine production for 2024 is provisionally estimated at **139 mhl** (excluding juices and musts), representing a decline of 4.8 mhl, compared to 2023. This projection indicates a 3% reduction from 2023, 11% below the five-year average. If confirmed, this would constitute the lowest wine production level recorded since the beginning of the 21st century. At the same time, total EU production represents 60% of the global total – a proportion consistent with the previous decade’s average.

The preliminary estimates reveal a complex landscape of climatic disruptions across EU wine regions due to climate change. Vineyards experienced a diverse array of environmental stressors, ranging from severe drought-induced hydric stress in some areas to unprecedented heavy rainfall and destructive storms in others. These extreme weather events precipitated increased disease pressure, substantial vineyard damage, and difficult grape cultivation conditions. Nevertheless, many regions report good quality outcomes due to careful vineyard management practices.

Figure 1 – World wine production volume (excluding juices and musts), 2000-2024





In 2024, **Italy** is estimated to be the largest wine producer in the EU and the world, with an estimated wine production of **41.0 mhl**, which is an increase of **2.7 mhl (+7%)** from 2023. This reflects a partial recovery from the notably low production in 2023, which saw the smallest production since the historically low harvest in 2017. However, the 2024 volume is still 13% below the five-year average. Adverse weather conditions affected the majority of Italian wine regions, most particularly in the North where a significant part of the vineyard was impacted by hailstorms.

France is expected to produce **36.9 mhl** in 2024, marking a significant drop of **10.9 mhl (-23%)** from 2023, and 16% below its five-year average. This is estimated to be the lowest production since the historically low record in 2017 (36.6 mhl). The significant decline in French wine production for 2024 is again attributable to adverse weather conditions across the country from flowering to harvest, impacting all wine regions, with issues like continuous rain, disease outbreaks, poor flowering, droughts and hailstorms reducing yields. This situation is linked to vineyard abandonments in regions such as Bordeaux, Languedoc-Roussillon, and the Rhône Valley.

Spain maintains its position as the third-largest wine producer in the EU, with an estimated vinified production volume of **33.6 mhl** in 2024. This figure represents an increase of **5.2 mhl (+18%)** relative to 2023, though it remains 4% below the last five-year average. The rise, driven by relatively positive harvests in Castilla-La Mancha and Extremadura, is a partial recovery from the severe droughts of 2023, but ongoing water stress continues to challenge wine production.

Regarding the other major wine-producing countries in the EU, positive growth rate is expected in Greece (1.4 mhl, +1% / 2023), **Slovenia (0.5 mhl, +2% / 2023)**, **Croatia (0.5 mhl, +1% / 2023)**, **Slovakia (0.3 mhl, +24% / 2023)**. These countries have all increased their production with respect to 2023; however, the expected levels are still below their last five-year averages.

Several countries within the EU expect a decrease in production compared to 2023. **Germany (8.1 mhl, -6% / 2023)** is experiencing declines, with figures falling below their five-year averages by -5%. Germany's 2024 wine production faces challenges reminiscent of the low 2017 harvest, with late spring frosts and heavy summer rains severely impacting yields. **Portugal** has an estimated 2024 wine production volume of **6.9 mhl (-8% / 2023)**; this level positions Portugal as one of the few EU countries achieving a harvest volume consistent with its five-year average (+0.2%). **Romania** and **Czechia** both anticipate significant decreases in wine production in 2024 due to droughts and spring frosts. Romania is expected to produce **3.7 mhl (-20% / 2023)** and 10% below its five-year average, while Czechia projects a production volume of **0.3 mhl (-28% / 2023)** and 38% below its five-year average. **Austria (2.2 mhl, -9% / 2023)** and **Bulgaria (0.7 mhl, -3% / 2023)** are projected to be 12% and 17% below their respective five-year averages. **Hungary** with **2.3 mhl** expects a decrease of 7% with respect to 2023, 10% below its last five-year average.

Luxembourg (77 khl, -5% / 2023), **Cyprus (63 khl, +26% / 2023)**, and **Malta (10 khl, -23% / 2023)** are estimated to have production levels below their five-year averages by 13%, 24% and 19% respectively, in line with the trend seen among most **producing** countries in the EU.

Figure 2 - Wine production in the EU27 (excluding juices and musts), 2000-2024

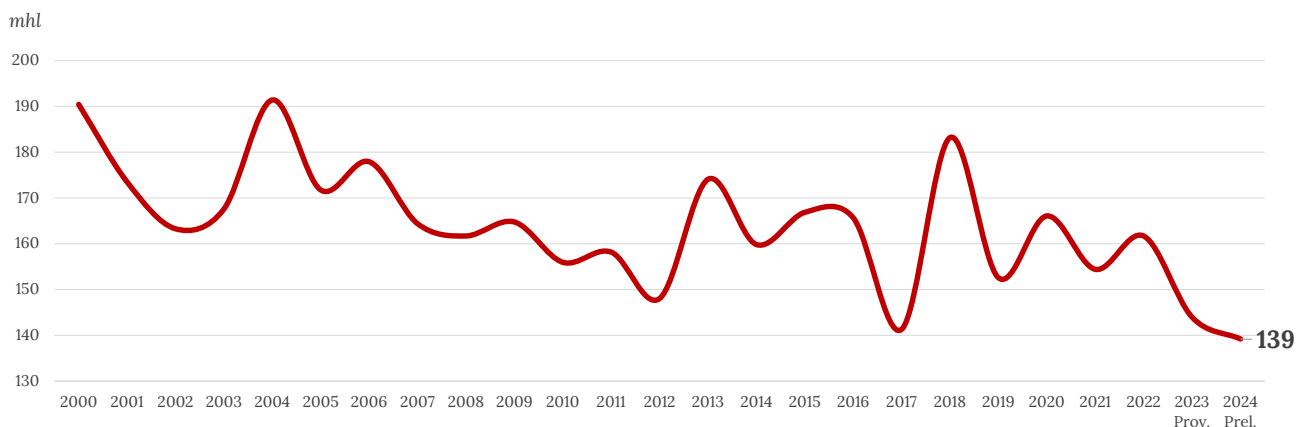




Table 1: Wine production (excluding juices and musts) in EU countries

Unit: mhl	2019	2020	2021	2022	Prov. 2023	Prel. 2024	24/23 Var.	24/23 Var. (%)	5-year Average	24/5-year Var. (%)
Italy	47.5	49.1	50.2	49.8	38.3	41.0	2.7	7%	47.0	-13%
France	42.2	46.7	37.6	46.0	47.9	36.9	-11.0	-23%	44.1	-16%
Spain	33.7	40.9	35.5	36.0	28.4	33.6	5.2	18%	34.9	-4%
Germany	8.2	8.4	8.4	8.9	8.6	8.1	-0.5	-6%	8.5	-5%
Portugal	6.5	6.4	7.4	6.8	7.5	6.9	-0.6	-8%	6.9	0%
Romania	3.8	3.8	4.5	3.8	4.6	3.7	-0.9	-20%	4.1	-10%
Hungary	2.4	2.6	2.6	2.5	2.4	2.3	-0.2	-7%	2.5	-10%
Austria	2.5	2.4	2.5	2.5	2.4	2.2	-0.2	-9%	2.4	-12%
Greece	2.4	2.2	2.4	2.1	1.4	1.4	0.0	1%	2.1	-34%
Bulgaria	0.9	0.9	0.9	0.8	0.7	0.7	-0.0	-3%	0.8	-17%
Slovenia	0.8	0.7	0.6	0.5	0.5	0.5	0.0	2%	0.6	-18%
Croatia	0.5	0.7	0.5	0.6	0.5	0.5	0.0	1%	0.5	-16%
Czechia	0.5	0.6	0.6	0.6	0.5	0.3	-0.1	-28%	0.6	-38%
Slovakia	0.3	0.4	0.3	0.3	0.3	0.3	0.1	24%	0.3	-2%
Luxembourg	0.1	0.1	0.1	0.1	0.1	0.1	-0.0	-5%	0.1	-13%
Cyprus	0.1	0.1	0.1	0.1	0.1	0.1	0.0	26%	0.1	-24%
Malta	0.0	0.0	0.0	0.0	0.0	0.0	-0.0	-23%	0.0	-19%
EU27	152	166	154	162	144	139	-4.8	-3%	156	-11%

2.2 • Northern Hemisphere excl. EU

In the **USA**, the fourth-largest wine producer globally, the preliminary estimate for 2024 wine production is **23.6 mhl**. This figure is 3% lower compared to 2023 and 1% below its five-year average.

Wine production 2024 in **Russia** is estimated at **4.7 mhl**, which is 0.2 mhl higher than the previous year and 4% above its five-year average.

As for **China**, data on wine grape harvest for 2024 remains unavailable. Updated figures for the year will be released in the first semester of 2025.

Georgia's wine production in 2024 is anticipated to reach **2.4 mhl**, marking a 27% increase from 2023 and 20% above its five-year average, representing the highest production level since the start of the century. This growth is attributed to favorable weather conditions across all key wine regions.

Moldova's 2024 forecast stands at **1.5 mhl**, reflecting a 16% decrease from the highly productive year of 2023, yet remaining 6% above its five-year average.

In **Switzerland**, wine production is projected at **0.8 mhl** for 2024, marking a 20% decline compared to 2023 and 9% below the five-year average, mainly impacted by unpredictable weather and downy mildew.

**Table 2: Wine production (excluding juices and musts) in major countries in the Northern Hemisphere excl. EU**

<i>Unit: mhl</i>	2019	2020	2021	2022	Prov. 2023	Prel. 2024	24/23 Var.	24/23 Var. (%)	5-year Average	24/5-year Var. (%)
USA*	25.6	22.8	24.1	22.4	24.3	23.6	-0.7	-3%	23.8	-1%
Russia	4.6	4.4	4.3	5.0	4.5	4.7	0.2	5%	4.6	4%
China**	7.8	6.6	5.9	4.7	3.2	NA	NA	NA	5.6	NA
Georgia	2.1	2.1	1.9	1.9	1.9	2.4	0.5	27%	2.0	20%
Moldova	1.5	0.9	1.4	1.4	1.8	1.5	-0.3	-16%	1.4	6%
Switzerland	1.0	0.8	0.6	1.0	1.0	0.8	-0.2	-20%	0.9	-9%

* OIV estimate based on USDA harvest figures

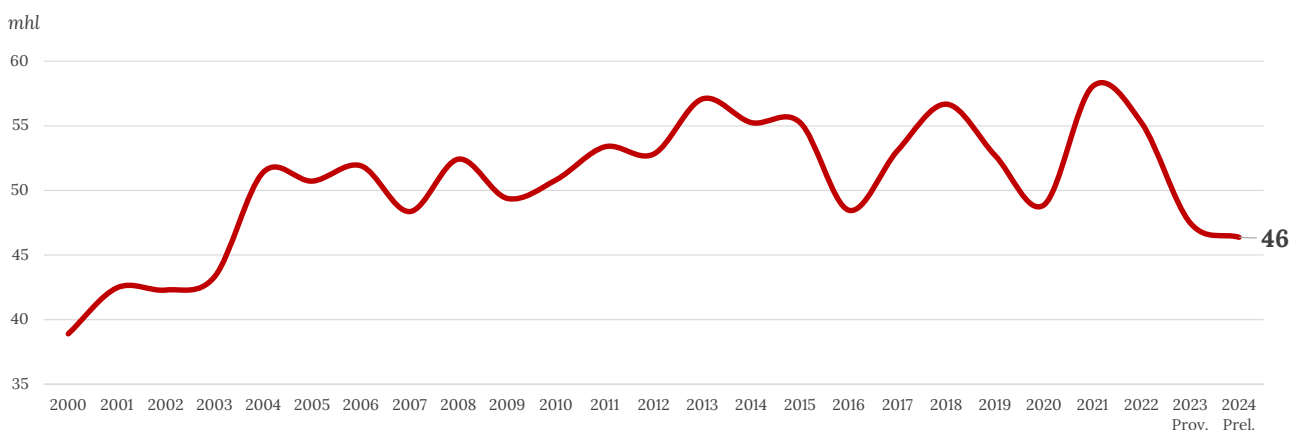
** OIV estimate based on China NBS and FAO

NA: not available

3 • Southern hemisphere

In the **Southern Hemisphere**, where the 2024 wine harvest concludes in the first half of the year, preliminary production estimates reveal a challenging vintage. After a record-high harvest in 2021, wine production has declined for three consecutive years, with the 2024 total estimated at **46 mhl**—a 2% decrease from 2023 and 12% below the five-year average, marking the lowest production since 2004.

This historically low output stems from significant climatic events across major wine-producing regions. Overall, the Southern Hemisphere's 2024 wine production represents 20% of the world total, consistent with the past decade's average.

Figure 3 - Wine production in the Southern Hemisphere (excluding juices and musts), 2000-2024



In South America, **Argentina** is forecasted to produce **10.9 mhl** in 2024, reflecting a significant recovery with a 23% increase from 2023, though still 4% below the five-year average. This increase comes after a challenging 2023 (8.8 mhl), impacted by severe spring frosts and hailstorms, and positions Argentina as the leading producer in the Southern Hemisphere for 2024. **Chile** is expected to produce **9.3 mhl**, showing a significant 15% decrease from 2023 and 21% below the five-year average. This decline is attributed to a late harvest due to an unusually cool spring and to drought conditions in some wine regions. **Brazil's** 2024 wine production is estimated at **2.7 mhl**, marking a substantial 25% drop from 2023 and 5% below the five-year average, driven by excessive spring rainfall.

In **South Africa**, wine production for 2024 is projected at **8.8 mhl**, marking a 5% decline from 2023 and 13% below the five-year average. The harvest faced multiple challenges, including frost, heavy winter rainfall, floods, and high winds. Notably, the extreme flooding in the Western Cape, estimated as a one-in-200-year event, alongside elevated disease pressure in certain areas, contributed significantly to the overall lower volume.

Australia's wine production is estimated at **10.2 mhl** in 2024, representing a slight 5% increase from 2023 but remaining 16% below the five-year average. The country continues to face challenges from excessive rainfall and inventory pressures. **New Zealand's** production is forecasted at **2.8 mhl**, a notable 21% decline from 2023 and 13% below the five-year average, primarily attributable to Marlborough's reduced harvest resulting from frost damage during the critical flowering period.

Table 3: Wine production (excluding juices and musts) in major countries in the Southern Hemisphere

<i>Unit: mhl</i>	2019	2020	2021	2022	Prov. 2023	Prel. 2024	24/23 Var.	24/23 Var. (%)	5-year Average	24/5-year Var. (%)
Argentina	13.0	10.8	12.5	11.5	8.8	10.9	2.1	23%	11.3	-4%
Australia	12.0	10.9	14.8	13.1	9.6	10.2	0.5	5%	12.1	-16%
Chile	11.9	10.3	13.4	12.4	11.0	9.3	-1.7	-15%	11.8	-21%
South Africa	9.7	10.4	10.8	10.3	9.3	8.8	-0.5	-5%	10.1	-13%
New Zealand	3.0	3.3	2.7	3.8	3.6	2.8	-0.8	-21%	3.3	-13%
Brazil	2.2	2.3	2.9	3.2	3.6	2.7	-0.9	-25%	2.8	-5%
Southern Hemisphere	53	49	58	55	47	46	-1.1	-2%	52	-12%



Note for editors:

- The OIV is the intergovernmental organisation of a scientific and technical nature of recognised competence for its work concerning vines, wine, wine-based beverages, table grapes, raisins and other vine-based products. It is composed of 51 Member States.
- In the framework of its competence, the objectives of the OIV are as follows:
 - to inform its members of measures whereby the concerns of producers, consumers and other players in the vine and wine products sector may be taken into consideration;
 - to assist other international organisations, both intergovernmental and non-governmental, especially those that carry out standardisation activities;
 - to contribute to international harmonisation of existing practices and standards and, as necessary, to the preparation of new international standards in order to improve the conditions for producing and marketing vine and wine products, and to help ensure that the interests of consumers are taken into account.

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