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Global Trends - Wine Industry Key Elements

Wine Intelligence Reports Shop - Global Wine Brand Power Index 2018

Wine Intelligence’s first Global Wine Brand Power Index puts Yellow Tail and Casillero del Diablo as the world’s strongest wine brands from a consumer point of view.

Building on consumer data from 16,000 wine drinker interviews across 15 markets, representative of over 380 million wine drinkers, the Wine Intelligence Global Wine Brand Power Index 2018 has been compiled to celebrate the company’s 15th anniversary.

Rather than being based on volume of sales, the Global Wine Brand Power Index is compiled based on how much of a connection a brand has with consumers. The Index used six input measures from consumers: awareness, recalled purchase in the past three months, conversion rate of awareness into purchase, future purchase consideration, and the brand connection measures of affinity and recommendation. The scores were compiled at a market level and were then weighted to reflect the relative size of each of the 15 markets included.

The most powerful brands, at a global level, are driven by two factors: success in the US market as the largest market for wine globally, and consistently strong rankings across a number of important global markets. Yellow Tail scores well on both counts and is the #1 most powerful brand in both the USA and Canada, as well as top 10 showings in Australia, China, Ireland, Japan, South Korea and the UK. The #2 brand, Casillero del Diablo, holds top five positions in a diverse set of markets including China, UK, South Korea, Sweden, as well as #1 rankings in Ireland, Brazil and its domestic Chilean market. Constellation’s Woodbridge and Robert Mondavi brands take 3rd and 4th spot in the global ranking, based on their strong showing in the US market.

In general, Australian and Chilean brands perform strongly across all markets and measures by virtue of the typically extensive international footprint they exhibit. The two countries’ brands account for 7 out of the top 15 in the Global Wine Brand Power Index, despite the two countries collectively accounting for just 9% of world wine production.

The Global Wine Brand Power Index 2018 report includes:
• The key findings from the Global Wine Brand Power Index 2018 along with the top 15 most powerful brands globally from a consumer perspective.
• Wine Brand Power 2018 by market, 15 markets in total, which includes the top 15 most powerful
brands in that market as well as key findings from that market.
• The key principles of delivering brand power and an explanation of the Wine Brand Power Index calculation.
Click here to read more

OIV Report: Distribution of the world’s grapevine varieties

Summary
This focus report on the distribution of the world’s grapevine varieties in 2015 has been produced by the International Organisation of Vine and Wine (OIV). It provides an overview of the distribution of the world's grapevine varieties and examines current changes in trends. This document focuses on all varieties, regardless of how the grapes are used (wine, table, drying or otherwise), encompassing 75% of the world's area under vines. It examines the data available on 44 countries since 2000, and focuses on those with a vineyard area above 65 000 ha and their 10 main varieties1. Note that the study is more representative of wine grapes than of other varieties given the nature of the data held by the OIV.

Of the world’s 10 000 known grapevine varieties, 13 cover more than one-third of the world's vineyard area and 33 varieties cover 50%.

Some grapevine varieties are planted in numerous countries and thus are called “international varieties”. The most obvious example is Cabernet Sauvignon, which is now one of the most cultivated varieties in the world (5% of the total world area under vines). Conversely, other varieties may be widely cultivated but only in a small number of countries, such as Kyoho, which is mainly grown in China.

1. Kyoho’s surface area has been increasing steadily, reaching 365 000 ha. It is the world’s most cultivated variety but the majority of its vines are in China (more than 90%).
2. Cabernet Sauvignon is widely distributed across the world. Covering an area of 341,000 ha, or 4% of the world’s vineyards, Cabernet Sauvignon was the second most-planted vine variety. It is mainly grown in China, France, Chile, the United States, Australia, Spain, Argentina, Italy and South Africa.
3. Covering an area of approximately 273 000 ha, Sultanina is the world’s most commonly used variety for table grapes and dried grapes. It is mainly grown in the Middle East (Turkey, Iran, Iraq, Afghanistan, Pakistan) and Central Asia (Uzbekistan, Turkmenistan, Tajikistan), where it is known as Kishmish.
4. Present in 37 countries, Merlot covered 266 000 ha, or 3 % of the total world area under vines.
5. Tempranillo is not widely grown outside of Spain; it may be present in 17 countries but 88% of its cultivated area is in Spain covering an area of 231 000 ha.
6. Accounting for 22% of Spanish vineyards, Airen is almost exclusively planted in its home country, where it is the top vine variety in terms of surface area with 218 000 ha.
7. Chardonnay’s vineyard area was 210 000 ha across 41 countries. This variety is grown in France, Italy and Spain, but the United States, Australia and Chile are also among its main producers.
8. Syrah has been widely exported to New World vine-growing countries (Australia, Argentina, South Africa, the United States, Chile), and has earned the reputation of being one of the most international grape varieties. Its vineyard area was 190 000 ha and it was grown in 31 countries.
9. With a surface area of 165 000 ha, Red Globe is the world’s second most cultivated table grape variety. A total of 91% of this variety's vineyard area is in China, but it is also grown in the United States, Spain, Portugal, Italy, Turkey, Chile, Argentina and South Africa.
10. Garnacha Tinta or Grenache Noir (163 000 ha) is predominantly grown in France and Spain (these two countries account for 87% of its world vineyard area).
11. Sauvignon blanc, very much an international variety (123 000 ha), is grown in all major wine-producing countries of the world. It is New Zealand's most cultivated vine variety, with almost 20 500 ha of vineyards.
12. Pinot Noir (Blauer Burgunder) (112 000 ha) is widely grown in Europe (Germany, Italy, Switzerland, Romania, Hungary, Spain), but also in the vineyards of the New World (United States, New Zealand, Australia, Chile, Argentina, South Africa).
13. Trebbiano Toscano, Ugni Blanc in France, (111 000 ha) is predominantly grown in Italy, France and Portugal.
<table>
<thead>
<tr>
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<th>Colour</th>
<th>Destination</th>
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<td>Table, drying and wine</td>
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<td>↑</td>
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</table>

*OIV estimates

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**OIV Variety Trends**

[OIV en-distribution-of-the-worlds-grapevine-varieties]