

Germany

Country Profile

July 2009

1. AREA UNDER VINES

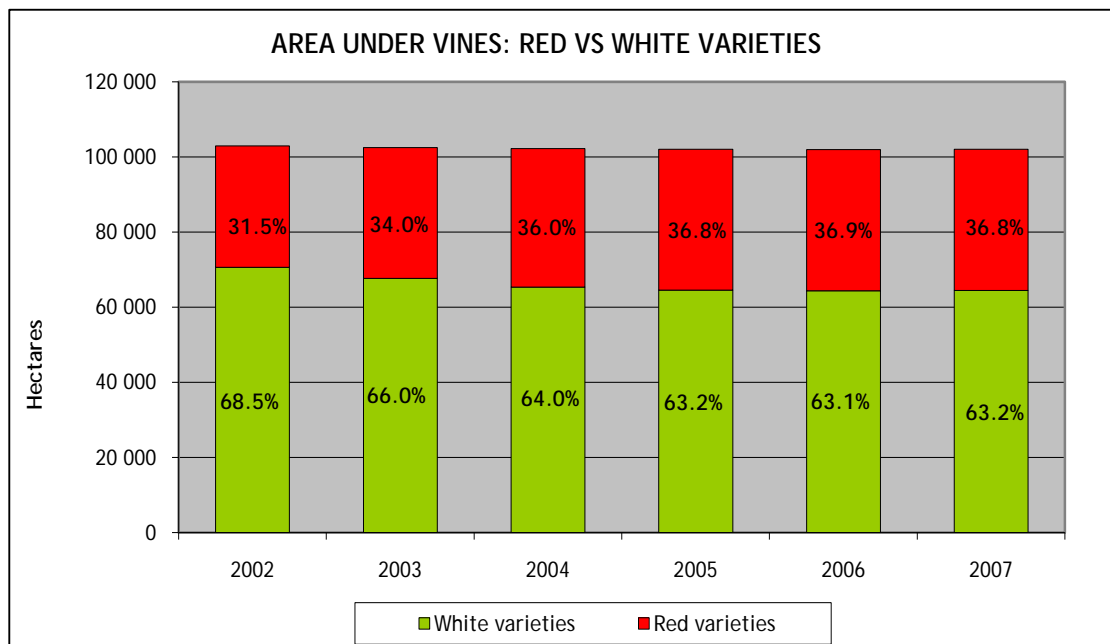
1.1 Total area under vines

Year	Total area (Hectares)
1995	104 000
1996	106 000
1997	104 243
1998	103 927
1999	104 233
2000	104 770
2001	103 605
2002	102 989
2003	102 489
2004	102 241
2005	102 037
2006	101 999
2007	102 026

Source: *Deutscher Wein Statistik*

1.2 Distribution of wine grape varieties

The red wine boom is slowing down. As a result, the overall vineyard area planted with white varieties has increased somewhat, while the percentage of red varieties has decreased. The increasing popularity of Riesling wines is also reflected in the vineyard area devoted to this varietal. With an area equal to 21.3% of Germany's vineyards, Riesling is by far the most important wine grape variety.



Grape variety	2003	2004	2005	2006	2007	% of total vineyard area 2006	% of total vineyard area 2007
	Hectares						
White varieties							
Bacchus	2 516	2 320	2 205	2 113	2 061	2.1%	2.0%
Chardonnay	891	958	1 018	1 087	1 120	1.1%	1.1%
Elbling	712	645	610	583	580	0.6%	0.6%
Faberrebe	972	847	758	689	632	0.7%	0.6%
Grauburgunder	3 433	3 786	4 211	4 382	4 413	4.3%	4.3%
Gutedel	1 144	1 131	1 129	1 123	1 129	1.1%	1.1%
Huxelrebe	876	775	711	677	656	0.7%	0.6%
Kerner	5 053	4 606	4 253	4 004	3 848	3.9%	3.8%
Morio-Muskat	683	618	576	541	517	0.5%	0.5%
Müller-Thurgau	16 078	14 983	14 346	13 988	13 824	13.7%	13.5%
Ortega	805	746	715	686	653	0.7%	0.6%
Riesling	20 770	20 627	20 794	21 197	21 722	20.8%	21.3%
Sauvignon Blanc	165	135	186	260	336	0.3%	0.3%
Scheurebe	2 192	2 003	1 864	1 781	1 702	1.7%	1.7%
Silvaner	5 820	5 578	5 383	5 314	5 261	5.2%	5.2%
Traminer	825	824	826	832	831	0.8%	0.8%
Weissburgunder	3 105	3 192	3 335	3 491	3 589	3.4%	3.5%
Other	1 623	1 615	1 580	1 583	1 592	1.6%	1.6%
Total white	67 663	65 389	64 500	64 331	64 466	63.1%	63.2%
Red varieties							
Cabernet Sauvignon	220	253	267	274	278	0.3%	0.3%
Domina	283	350	381	395	404	0.4%	0.4%
Dornfelder	7 686	8 200	8 259	8 231	8 185	8.1%	8.0%
Dunkelfelder	369	379	379	372	362	0.4%	0.4%
Lemberger	1 438	1 535	1 612	1 664	1 702	1.6%	1.7%
Merlot	312	370	399	416	431	0.4%	0.4%
Pinot Noir (Spätburgunder)	11 022	11 371	11 660	11 807	11 820	11.6%	11.6%
Portugieser	4 931	4 879	4 818	4 683	4 551	4.6%	4.5%
Regent	1 389	2 037	2 158	2 183	2 182	2.1%	2.1%
Saint Laurent	608	652	669	673	675	0.7%	0.7%
Schwarzriesling	2 514	2 491	2 459	2 424	2 397	2.4%	2.3%
Trollinger	2 597	2 578	2 543	2 518	2 504	2.5%	2.5%
Other	1 457	1 757	1 933	2 028	2 069	2.0%	2.0%
Total red	34 826	36 852	37 537	37 668	37 560	36.9%	36.8%
Total red & white	102 489	102 241	102 037	101 999	102 026	100.0%	100.0%

Source: Deutscher Wein Statistik

2. PRODUCTION

The 2007 crop yielded 10,3 million hectolitres of total gross wine, a quantity well above average. The quality of the crop was also high.

Year	Table wine	Quality wine	Q.m.P wine**	Total gross wine
	Litres			
1996	17 989 000	636 415 600	204 779 600	864 188 500
1997	25 414 500	437 626 600	368 037 500	831 078 500
1998	52 878 300	754 709 900	254 454 300	1 062 042 400
1999	138 724 100	735 363 200	338 223 600	1 212 310 800
2000	77 706 500	671 993 100	235 470 300	985 169 800
2001	38 436 400	608 454 500	242 201 700	889 092 600
2002	62 306 100	652 966 900	273 207 900	988 480 900
2003	24 820 000	361 086 800	425 083 100	810 989 900
2004	58 652 600	686 758 000	255 244 600	1 000 655 200
2005	30 705 800	598 717 700	285 852 000	915 275 500
2006	36 287 200	608 868 700	246 443 400	891 599 300
2007	56 549 800	661 277 600	308 227 100	1 026 054 400

** Premium quality wines

Source: Deutscher Wein Statistik

3. CONSUMPTION

Based on statistical data issued by the Nürnberg-based Association for Consumer Research, wine accounted for approximately one third of private household spending on alcoholic beverages during 2007. Particularly positive is the fact that more than half of this amount was spent on domestic wine.

3.1 Total wine consumption

Year	Wine consumption (Litres)
1997	1 897 400 000
1998	1 897 000 000
1999	1 975 100 000
2000	1 956 500 000
2001	2 004 400 000
2002	2 027 200 000
2003	1 973 500 000
2004	1 984 500 000
2005	1 984 800 000
2006*	1 993 800 000
2007*	2 015 200 000

* Provisional

Source: OIV

3.2 Per capita consumption

Year	Total alcoholic beverages	Wine	Beer	Spirits
	Litres			LAA
2000	154.5	19.0	125.6	5.8
2001	151.2	19.8	122.4	5.8
2002	151.8	20.3	121.7	5.9
2003	147.3	19.8	117.8	5.9
2004	145.7	20.1	116.0	5.8
2005	144.8	19.9	115.4	5.7
2006	145.8	20.1	116.1	5.7
2007	141.7	20.6	111.7	5.6

Source: Deutscher Wein Statistik

Please Note: Due to the Copyright and Licence Agreement between SAWIS and Euromonitor, access to the following Euromonitor statistics will only be available by emailing Lizelle Arendse, Information Officer at SAWIS (lizelle@sawis.co.za). Only South African Wine Industry role-players will gain access to these statistics. These statistics will be available in electronic - and hard copy.

4. CONSUMER EXPENDITURE ON ALCOHOLIC DRINKS

5. ALCOHOLIC DRINKS

5.1 Sales of alcoholic drinks by sector - Total volume

5.2 Sales of alcoholic drinks by sector - Total value

5.3 Forecast of alcoholic drinks by sector - Total volume

5.4 Forecast sales of alcoholic drinks by sector - Total value

6. SALES OF WINE BY SUBSECTOR

6.1 Total volume

6.2 Total value

7. FORECAST SALES OF WINE BY SUBSECTOR

7.1 Total volume

7.2 Total value

8. SALES OF WINE BY PRICE SEGMENT

8.1 Red wine

8.2 White wine

8.3 Rosé wine

9. SALES OF WINE BY QUALITY CLASSIFICATION

9.1 Red wine

9.2 White wine

9.3 Rosé wine

10. DISTRIBUTION

10.1 On-trade vs Off-trade sales of wine - Total volume

10.2 On-trade vs Off-trade sales of wine - Total value

10.3 Off-trade sales of wine by distribution format: % analysis

11. INTERNATIONAL TRADE

11.1 Total exports

Some 192 million litres of German wine were exported in 2007.¹

The average price per litre was about two euros, equivalent to an export value of 383 million.

Year	Volume (litres)	Value (‘000 Euro)
1995	239 198 900	323 790
1996	236 020 300	352 472
1997	217 798 800	347 781
1998	213 709 400	359 518
1999	214 513 600	347 300
2000	231 199 800	348 769
2001	221 481 500	348 208
2002	221 457 800	361 799
2003	253 141 000	425 652
2004	254 935 800	431 723
2005	264 502 100	474 674
2006	290 633 500	561 234
2007 ¹	191 900 000	383 000

Source: *Deutscher Wein Statistik*

¹ From 2007 export figures are net figures, i.e. they no longer include the volume and value of wines of foreign origin that are imported and then re-exported by German commercial wineries. Figures published in the past were gross figures. As such, a direct comparison of the current figures with those of previous years is not possible. However, the net figures provide a more accurate picture of the status of German wine exports.

11.2 Exports by destination

Countries	2007 ¹		2006		2005	
	Value ('000 Euro)	Volume (litres)	Value ('000 Euro)	Volume (litres)	Value ('000 Euro)	Volume (Litres)
Austria	5 117	2 079 400	13 155	4 195 100	12 649	3 891 600
Canada	13 996	4 837 400	15 308	5 721 100	10 247	4 066 500
China	4 167	1 024 700	2 879	720 300	1 819	454 900
Denmark	6 241	4 335 900	12 351	9 590 600	11 009	7 618 500
France	10 538	6 376 900	18 542	10 433 400	19 292	10 908 300
Ireland	5 366	2 767 500	9 348	4 659 800	8 636	4 476 400
Italy	1 308	771 000	3 907	1 715 800	3 815	2 450 800
Japan	14 451	3 816 200	22 759	6 239 400	22 409	6 183 700
Netherlands	34 485	24 662 800	69 104	47 652 600	58 716	40 719 300
Norway	14 801	6 086 900	25 602	8 552 900	16 727	7 299 400
Russia	17 618	13 412 900	22 765	16 913 200	10 643	62 033
Sweden	19 051	11 648 000	23 687	17 610 000	22 391	17 982 400
Switzerland	4 835	759 600	13 804	2 156 900	8 187	1 754 600
UK	84 737	55 747 400	128 342	82 512 200	126 827	89 748 700
USA	102 792	30 005 100	100 350	30 164 900	77 809	24 882 600

Source: *Deutscher Wein Statistik*

¹ From 2007 export figures are net figures, i.e. they no longer include the volume and value of wines of foreign origin that are imported and then re-exported by German commercial wineries. Figures published in the past were gross figures. As such, a direct comparison of the current figures with those of previous years is not possible. However, the net figures provide a more accurate picture of the status of German wine exports.

11.3 Total imports by type

	2007		2006		2005	
	Value ('000 Euro)	Volume ('000 Litres)	Value ('000 Euro)	Volume ('000 Litres)	Value ('000 Euro)	Volume ('000 Litres)
White wine	494 000	585 000,0	440 384	532 613,0	439 376	483 774,9
Red wine	993 000	681 800,0	964 889	638 715,8	947 915	646 753,8
Liqueur wine	31 000	11 500,0	28 960	10 756,5	37 216	14 458,2
Aromatised wine	41 000	39 000,0	32 536	54 697,3	27 002	54 090,0
Sparkling wine	364 000	76 700,0	393 909	95 985,9	268 172	64 784,2
Carbonated wine	87 000	63 500,0	69 701	51 573,2	74 808	48 466,0
Total Potable wines	2 009 000	1 457 500,0	1 930 379	1 384 341,7	1 794 489	1 312 327,1
Wine for Distillation	0	0	1	0,3	0	0
Total	2 009 000	1 457 500,0	1 930 380	1 384 342,0	1 794 489	1 312 327,1
Grape juice (partly fermented)	4 000	5 700,0	3 373	7 177,8	2 760	5 689,6

Source: Deutscher Wein Statistik

11.4 Imports by origin

Countries	2007		2006		2005	
	Value (‘000 Euro)	Volume (Litres)	Value (‘000 Euro)	Volume (Litres)	Value (‘000 Euro)	Volume (Litres)
Argentina	9 000	6 300 000	8 983	6 250 400	7 700	6 293 500
Australia	59 000	45 200 000	61 959	39 792 600	68 463	40 251 900
Austria	42 000	35 200 000	34 063	30 676 700	31 222	32 113 700
Bulgaria	3 000	3 000 000	3 667	4 093 200	4 771	6 396 700
Chile	67 000	62 700 000	57 742	45 314 100	74 859	57 393 100
France	587 000	239 900 000	588 357	232 145 600	516 094	225 242 900
Greece	19 000	12 400 000	18 160	12 221 600	22 964	14 886 500
Hungary	14 000	13 900 000	13 314	15 120 200	13 696	14 457 900
Italy	718 000	621 900 000	657 009	632 128 000	616 987	543 881 500
Macedonia	15 000	38 000 000	13 144	34 923 400	13 445	33 992 700
New Zealand	4 000	900 000	3 080	687 200	5 969	1 186 400
Portugal	30 000	15 100 000	26 717	13 669 400	30 221	15 607 700
Romania	5 000	6 700 000	6 360	8 661 600	7 976	12 759 500
South Africa	67 000	57 700 000	56 344	38 550 200	58 684	37 300 900
Spain	290 000	242 800 000	296 455	214 283 300	236 000	202 597 200
Switzerland	4 000	700 000	4 510	989 700	5 598	1 281 400
USA	62 000	46 300 000	66 291	46 516 600	60 384	44 923 700

Source: Deutscher Wein Statistik