

World Overview

August 2009

1. AREA UNDER VINES (including table grapes)

After sustained growth until 1980, worldwide areas planted under vines decreased under the effect of European Union measures encouraging vine uprooting and extensive vine uprooting carried out in the former USSR. This reduction continued at a fairly slow rate until 1998. As such, at that time, with 7 721 000 ha, world vineyards hit its lowest level since 1950. This situation was followed by an adjustment in 1998, further accentuated in 1999. In 2003 vineyards worldwide accounted for a total area under plantation of 7 942 000 ha, a decrease of 0.2% on 2002. This signalled the end of the high-speed growth rate recorded since between 1999 and 2002. During this period the world vineyard overall had grown by 232 000 ha, while from 2002 to 2005 vineyard area decreased by 26 000 ha. These variations in the development of the world vineyard reflect the highly diversified situations between continents and countries:

- By reaching 395 000 ha in 2005, Africa continues to show growth in vineyards, reflecting the influence of continued growth of South Africa and Egypt but also the taking off again of vineyards in Algeria which have reached levels such as at the beginning of the 1990s.
- America, with 967 000 ha in 2005, after marking a pause between the high-speed development registered in 2001 and 2002, especially noticeable since 1996, has shown an increase of 14 000 ha in 2005 over 2004. Growth of 6 000 ha was experienced in Argentina. In Chile, Brazil and the USA total area under vines increased by 4 000 ha, 3 000 ha and 1 000 ha respectively.
- Asia, with 1 727 000 ha, is the main growth pole for world vineyards (+22 000 ha in 2005, after +10 000 ha between 2003 and 2004). A significant part of these vineyards is intended for the production of non-vinified products, particularly in Iran, Turkey and Syria. Vineyard area have increased in Iran and Syria and decreased in Turkey. China was the primary contributor to the growth in Asian vineyards, showing an increase of 25 000 ha.
- Europe saw its area under vines stabilise between 1999 and 2000 at a total area under vines of 4 900 000 ha under the influence of growth in the area under vines of the EU-15 (+50 000 ha between 1998 and 2000), after the opening-up of national quotas for new plantations. In 2005, the continent once again registered a drop of 21 000 ha (-0.4% from 2004).
- Oceania, with 192 000 ha (+6 000 ha from 2004) in 2005, has once again shown substantial growth after experiencing a pause between 2002 and 2003, in the high speed development sustained since 1995. Following a 7 000 ha increase in 2004, Australia experienced growth of 3 000 ha between 2004 and 2005.

The 2006, 2007 and 2008 data are only available for selected countries, as a result the rankings are based on 2005 data (the latest complete data set).

hectares

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007*	2008**
Argentina	210 000	208 000	201 000	205 000	208 000	211 000	213 000	219 000	223 000	226 000	225 000
Australia	98 000	122 915	139 861	148 275	159 000	157 000	164 000	167 000	169 000	174 000	173 000
Brazil	60 000	61 000	63 000	66 000	69 000	73 000	76 000	79 000	94 000	97 000	100 000
Canada	7 000	8 000	8 000	11 000	11 000	11 000	11 000	11 000	n/a	n/a	n/a
Chile	144 000	158 000	174 000	181 000	184 000	185 000	189 000	193 000	195 000	196 000	198 000
China	194 000	240 000	308 000	363 000	421 000	455 000	460 000	485 000	490 000	500 000	500 000
France	913 000	914 000	907 000	900 000	898 000	888 000	889 000	894 000	887 000	867 000	852 000
Germany	106 000	104 000	105 000	104 000	102 000	102 000	102 000	102 000	102 000	102 000	102 000
Greece	129 000	128 000	131 000	116 000	116 000	111 000	112 000	113 000	112 000	117 000	116 000
Hungary	106 000	127 000	113 000	93 000	93 000	93 000	87 000	83 000	78 000	75 000	72 000
Iran	270 000	288 000	277 000	283 000	302 000	300 000	329 000	338 000	n/a	n/a	n/a
Italy	899 000	909 000	908 000	892 000	872 000	862 000	849 000	842 000	843 000	842 000	840 000
Japan	22 000	22 000	22 000	21 000	21 000	21 000	21 000	20 000	n/a	n/a	n/a
Luxembourg	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	n/a	n/a	n/a
Moldavia	159 000	119 000	147 000	155 000	153 000	149 000	146 000	147 000	n/a	n/a	n/a
New Zealand	7 580	9 000	14 000	15 000	17 000	19 000	21 000	25 000	27 000	30 000	35 000
Portugal	260 000	261 000	246 000	248 000	251 000	249 000	247 000	248 000	249 000	248 000	250 000
Romania	253 000	253 000	248 000	247 000	243 000	239 000	222 000	218 000	213 000	205 000	201 000
Spain	1 171 000	1 180 000	1 229 000	1 221 000	1 202 000	1 207 000	1 200 000	1 180 000	1 174 000	1 169 000	1 165 000
South Africa	111 000	115 000	124 000	126 000	129 000	132 000	133 000	134 000	134 000	133 000	132 000
South Korea	30 000	33 000	31 000	29 000	28 000	27 000	25 000	24 000	n/a	n/a	n/a
Taiwan	3 000	3 000	3 000	3 000	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Turkey	582 000	575 000	575 000	564 000	570 000	570 000	559 000	555 000	527 000	510 000	500 000
UK	1 000	1 000	2 000	2 000	1 000	1 000	1 000	1 000	n/a	n/a	n/a
USA	372 000	384 000	412 000	426 000	415 000	415 000	398 000	399 000	406 000	409 000	411 000
Uzbekistan	132 000	132 000	104 000	105 000	106 000	103 000	104 000	107 000	n/a	n/a	n/a
WORLD TOTAL	7 721 000	7 732 000	7 868 000	7 923 000	7 955 000	7 942 000	7 904 000	7 929 000	7 902 000	7 889 000	7 861 000

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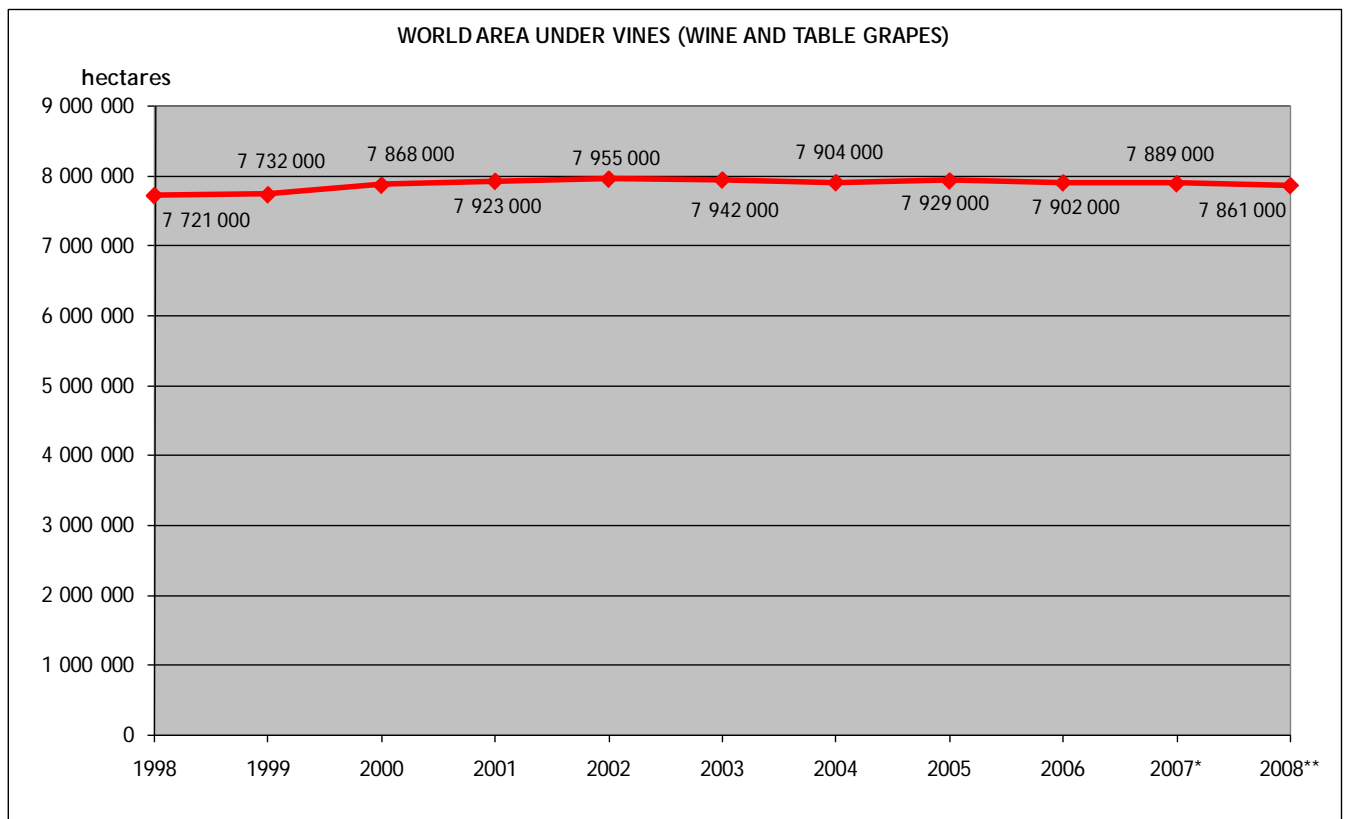
*Provisional

**Forecast

Source: OIV

The 2006, 2007 and 2008 data are only available for selected countries, as a result the rankings are based on 2005 data (the latest complete data set).

TOP 15 COUNTRIES IN 2005 - AREA UNDER VINES (HA)		
Rank	Country	Hectares
1	Spain	1 180 000
2	France	894 000
3	Italy	842 000
4	Turkey	555 000
5	China	485 000
6	USA	399 000
7	Iran	338 000
8	Portugal	248 000
9	Argentina	219 000
10	Romania	217 000
11	Chile	193 000
12	Australia	167 000
13	Moldavia	147 000
14	South Africa	134 000
15	Greece	113 000

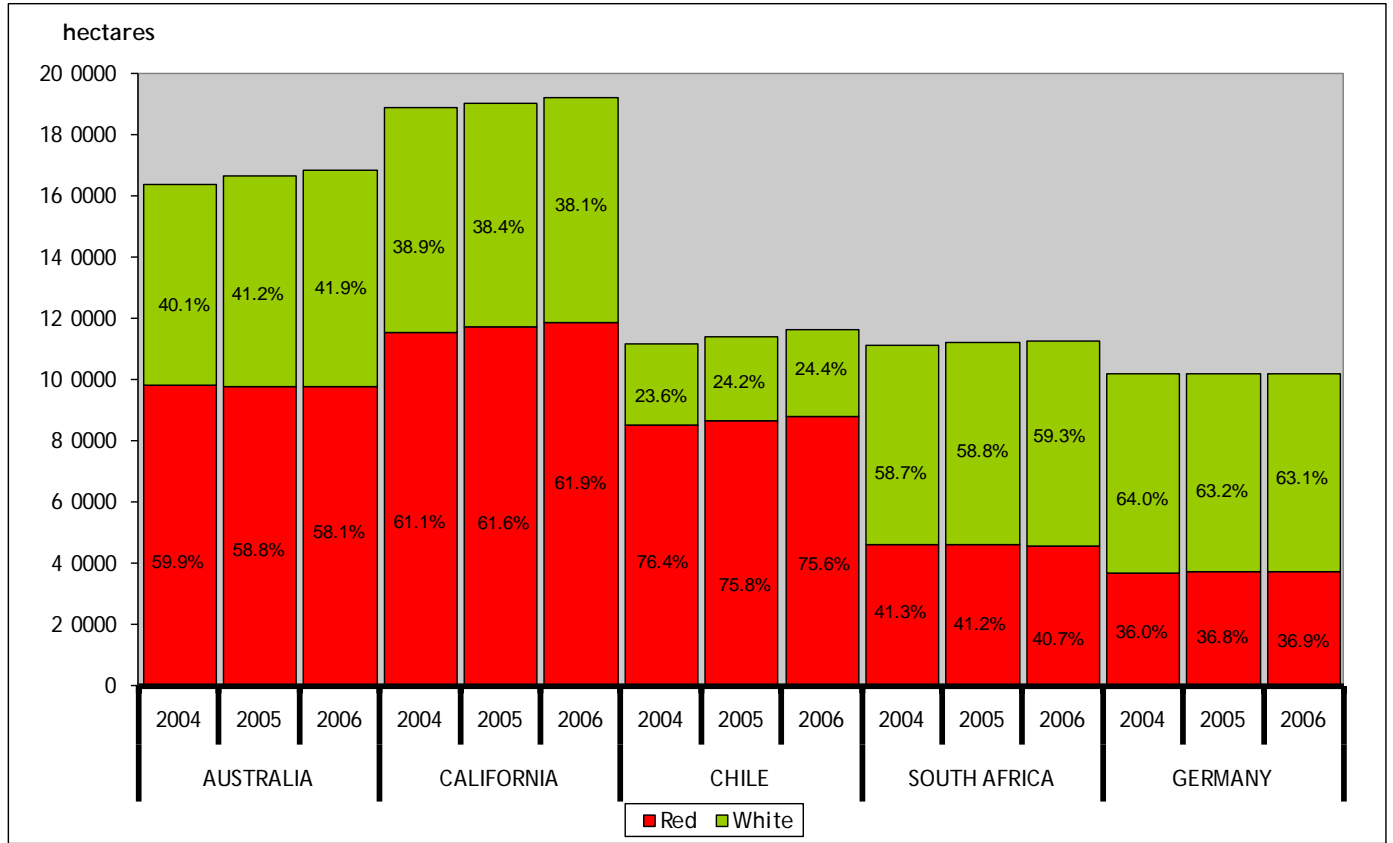


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**Forecast

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1.1 Area under vines (wine grapes) - Selected countries



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2. PRODUCTION (not including juice and must)

The 1986-1990 period was characterised by a sharp drop in world viticultural production compared to the beginning of the 1980s. Annual average production fell from 33 300 million litres to 30 400 million litres, or by 9%. With annual average production of 26 309 million litres, during the following five-year period this trend continued and even accelerated as the drop increased to 13.5%. Since 1995, there has been a reversal. Despite occasionally unfavourable climatic conditions, such as in 1998 (El Niño), world wine production has never dropped under the level recorded in 1998. World wine production amounted to 28 228 million litres in 2005.

- In 2005, Africa posted a total production of 1 006 million litres, down 87 million litres compared to 2004 (-7.9%). This is mainly attributed to a similar drop in South African production, which reached 841 million litres.
- America reached 5 228 million litres, an increase of 6.4%. Despite a drop in wine production in Brazil (-18.5%), Argentina (-1.6%), Uruguay (-20.8%), Peru (-5.0%) and Canada (-3.4%), the production level for the continent has exceeded the 1996 to 2000 average.
- Total wine production in Asia reached 1 360 million litres in 2005, an increase of 0.8%. This growth is mainly attributed to a 2.6% increase in production in China offsetting a drop in production in both Cyprus (-51.2%) and Turkey (-7.1%).
- Europe's total production amounted to 19 102 million litres in 2005. The EU 15, along with the former USSR countries and Central and Eastern Europe all recorded a drop in production, which has led to an overall decrease of 9.3% in European production.
- Oceania, with 1 532 million litres, registered a 3.5% decrease compared to a 39.4% increase between 2003 and 2004, but production levels still remain above the 2001 level.

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'000 litres

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007*	2008**
Argentina	1 267 300	1 588 800	1 253 700	1 583 500	1 269 500	1 322 500	1 546 400	1 522 200	1 539 600	1 504 600	1 467 700
Australia	741 500	851 100	859 200	1 075 600	1 150 900	1 083 500	1 467 900	1 430 100	1 426 300	955 000	1 236 500
Austria	n/a	280 300	233 800	253 100	259 900	252 600	273 500	226 400	225 600	262 800	292 200
Belgium	100	200	200	200	200	200	200	100	n/a	n/a	n/a
Brazil	278 200	311 600	363 800	296 800	321 200	262 000	392 500	319 900	237 200	350 200	350 000
Bulgaria	n/a	171 500	330 500	226 000	198 200	231 400	194 900	170 800	175 700	179 600	180 000
Canada	37 100	51 200	42 800	44 500	46 900	35 900	52 200	50 400	n/a	n/a	n/a
Chile	547 500	480 700	667 400	565 800	562 300	668 200	630 100	788 600	844 800	822 700	868 300
China	958 100	1 026 100	1 050 000	1 080 000	1 120 000	1 160 000	1 170 000	1 200 000	n/a	n/a	n/a
France	5 267 100	6 043 500	5 754 000	5 533 900	5 035 300	4 636 000	5 738 600	5 210 500	5 212 700	4 600 000	4 142 900
Germany	1 083 400	1 212 300	985 200	889 100	988 500	819 100	1 000 700	915 300	891 600	1 026 300	1 040 000
Greece	382 600	368 000	355 800	347 700	308 500	379 900	424 800	402 700	393 800	351 100	380 000
Hungary	n/a	333 900	429 900	551 400	333 300	388 000	434 000	356 700	327 100	322 200	350 000
Italy	5 418 800	5 645 400	5 162 000	5 229 300	4 460 400	4 484 800	5 318 100	5 402 100	5 203 600	4 590 000	4 863 300
Japan	130 100	132 800	115 400	110 000	111 000	93 800	86 200	90 000	n/a	n/a	n/a
Luxembourg	16 000	18 400	13 200	13 500	15 400	12 300	15 600	13 500	n/a	n/a	n/a
New Zealand	60 600	60 200	60 100	53 300	89 000	55 000	119 200	102 000	133 200	147 600	205 200
Portugal	375 000	785 900	671 000	778 900	667 700	734 000	748 100	726 600	754 300	604 200	559 600
Romania	500 200	605 400	545 600	509 000	546 100	555 500	616 600	260 200	501 400	528 900	678 900
Russia	n/a	256 000	305 000	343 000	406 000	453 000	512 000	503 500	628 000	728 000	711 000
Spain	3 117 200	3 372 300	4 169 200	3 050 000	3 347 800	4 184 300	4 298 800	3 615 800	3 813 700	3 678 100	3 463 000
South Africa	815 600	914 100	837 200	746 500	718 900	885 300	927 900	840 600	939 800	978 300	1 016 500
Switzerland	n/a	n/a	n/a	117 300	111 200	96 700	115 900	100 100	101 000	104 000	107 300
Turkey	34 500	26 000	23 300	28 200	26 200	22 500	30 900	28 700	n/a	n/a	n/a
UK	1 200	1 300	1 400	1 500	1 000	1 500	1 700	1 700	n/a	n/a	n/a
USA	2 030 600	2 069 100	2 555 100	1 920 000	2 030 000	1 950 000	2 010 900	2 288 800	1 944 000	1 991 000	1 920 000
WORLD TOTAL	25 636 600	28 103 900	28 041 500	26 664 100	25 786 400	26 681 700	30 002 100	28 227 600	28 480 000	26 840 000	26 940 000

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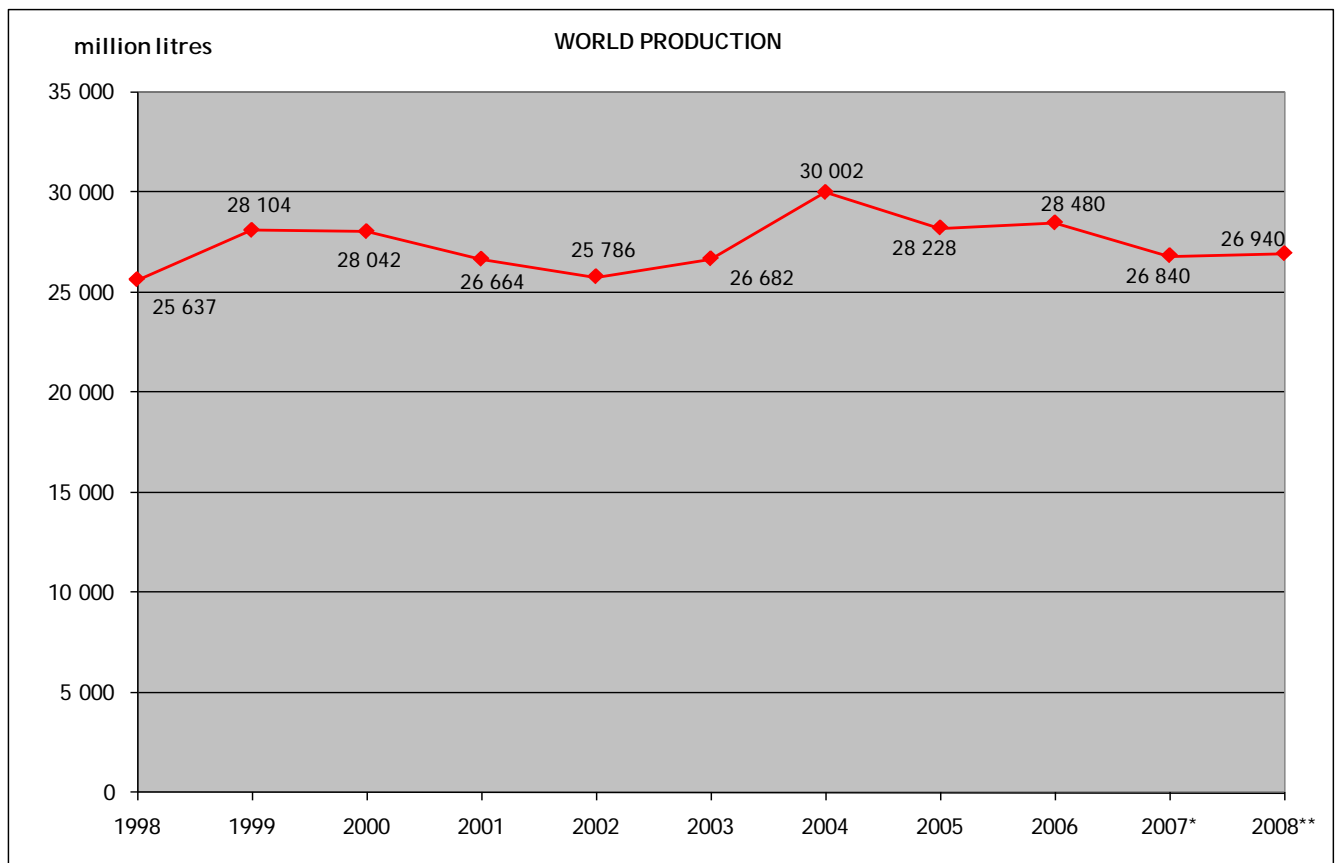
*Provisional

**Forecast

Source: OIV

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TOP 10 COUNTRIES IN 2005 - WINE PRODUCTION (LITRES)		
Rank	Country	Volume
1	Italy	5 402 100 000
2	France	5 210 500 000
3	Spain	3 615 800 000
4	USA	2 288 800 000
5	Argentina	1 522 200 000
6	Australia	1 430 100 000
7	China	1 200 000 000
8	Germany	915 300 000
9	South Africa	840 600 000
10	Chile	788 600 000

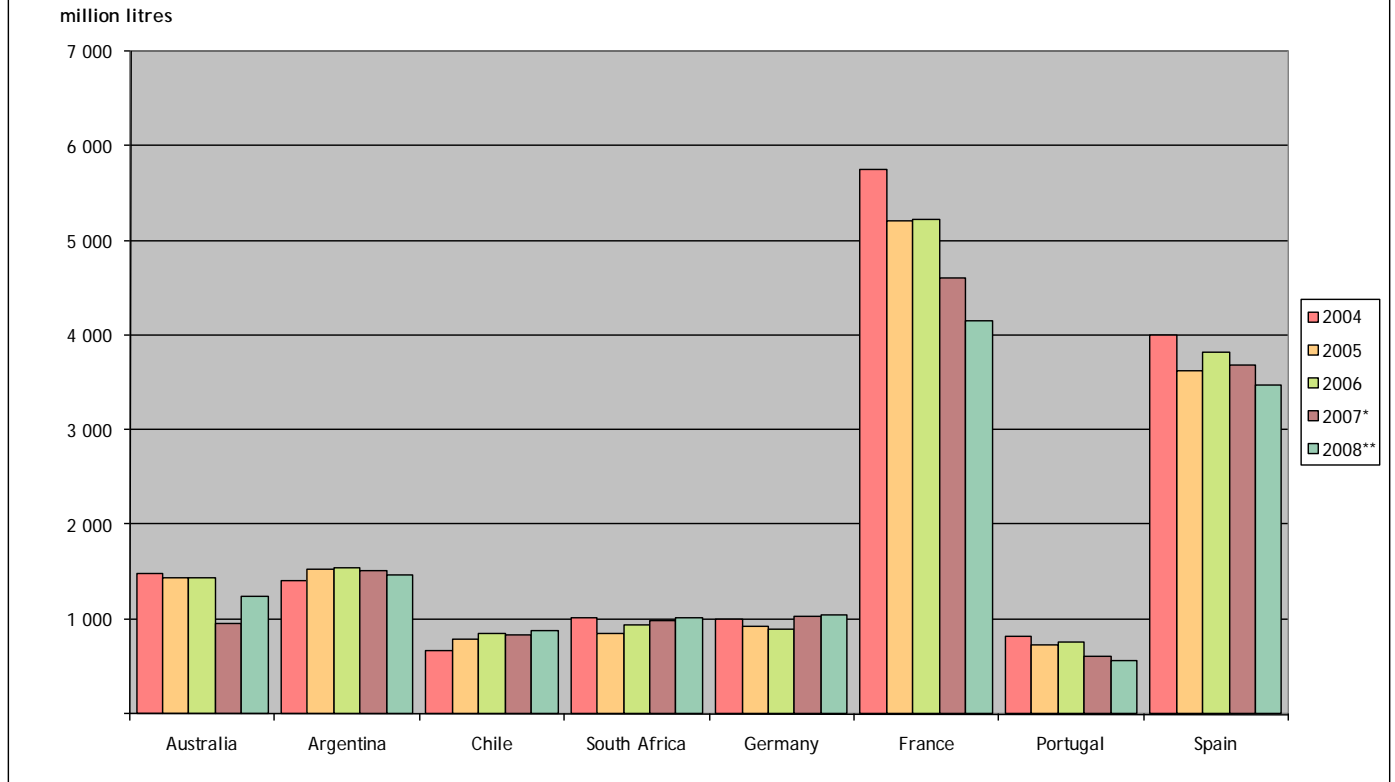


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WINE PRODUCTION - SELECTED COUNTRIES



*Provisional

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3. CONSUMPTION

During the 1980s there was a drop in world wine consumption. The 1990s was characterised by a relatively unstable consumption level, alternately increasing and decreasing up until the year 2000 when consumption amounted to 22 656 million litres. 2001 saw the start of the prevalent increasing trend. Most notable was the 3.2% increase in 2003, when the consumption level reached 23 589 million litres. In 2005 wine consumption reached a peak at 23 767 million litres.

As far as average annual consumption per capita is concerned:

- France has become the leader with 55.4 litres per capita in 2005;
- Per capita consumption in Luxembourg fell to 54.6 litres (-4.7%), hence it was surpassed by France and occupies the second place in 2005;
- Despite a 2.5% decrease, Portugal has moved into third place with 46.7 litres per capita.
- Italy, with 46.5 litres, experienced a considerable drop (-5.7%) in per capita consumption and fell to fourth position;
- Greece showed a significant 8.4% increase in per capita consumption and was ranked number nine in 2005;
- Spain's per capita consumption continues to decline, in 2005 it amounted to 31.8 litres;
- Argentina recorded per capita consumption of 28.3 litres in 2005;
- Chile, with 16.2 litres per capita, where the individual level of consumption has increased by 2.5% in 2005.

Most countries which are traditionally high-level producers and consumers of wine, as well as of other alcoholic drinks in significant proportions, have either seen stabilisation or a decrease in their individual consumption.

In the new producer countries, having recently increased their production potential, the development observed is slow, except for New Zealand where individual consumption continues to grow at a substantial rate. In this regard, China is having difficulties in pursuing the sharp rises registered until 1998 and reached 1.0 litres per capita in 2005. In the USA and Canada, consumption increased to reach 8.4 and 11.5 litres per capita, respectively. In Australia individual consumption growth seems to have taken off again since 2004 and reached 22.4 litres per capita in 2005. Individual consumption in South Africa has once again decreased to reach 7.3 litres in 2005.

In countries that are not wine producers or only at a modest level, in general, there is a growth trend in individual consumption, as in the United Kingdom, Ireland, Norway and Finland (20.0, 16.4, 13.2 and 9.4 litres per capita respectively, in 2005). Sweden also experienced a phenomenal increase of 15.6% in individual consumption, reaching 17.0 litres per capita in 2005. However, a downturn in individual consumption can be observed in Denmark (28.7 litres per capita compared to 29.8 litres per capita in 2004) and Iceland (10.2 litres per capita compared to 10.3 litres per capita in 2004).

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3.1 Total wine consumption

	'000 litres										
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007*	2008**
Argentina	1 268 300	1 256 700	1 244 300	1 203 600	1 198 800	1 233 800	1 111 300	1 097 200	1 110 300	1 116 600	1 067 200
Australia	364 400	372 600	388 900	397 620	400 700	419 600	436 100	452 300	458 300	476 900	491 200
Austria	250 000	250 500	251 700	229 100	240 300	238 300	240 000	240 000	245 000	245 000	240 000
Brazil	255 200	296 300	240 000	307 900	317 800	307 700	317 700	371 000	346 600	325 400	320 000
Canada	235 500	268 800	275 600	280 000	288 400	344 000	360 700	371 900	n/a	n/a	n/a
Chile	271 300	285 300	227 100	225 000	229 700	255 200	254 700	264 400	238 000	298 000	290 000
China	977 200	1 054 600	1 069 500	1 105 400	1 147 000	1 158 600	1 328 600	1 350 000	n/a	n/a	n/a
Denmark	156 400	156 200	155 000	177 200	170 900	170 600	161 200	156 000	160 600	178 000	176 000
Finland	31 200	33 500	35 200	38 200	41 600	45 300	47 300	49 400	52 400	55 900	52 000
France	3 633 000	3 540 000	3 450 000	3 391 600	3 482 000	3 408 100	3 314 100	3 300 000	3 300 300	3 216 900	3 175 000
Germany	1 897 000	1 975 100	2 015 000	2 004 400	2 027 200	1 973 500	1 984 500	1 984 800	1 993 800	2 015 200	2 000 000
Greece	292 700	305 900	274 700	294 000	242 000	307 200	330 000	358 600	320 000	330 000	315 000
Ireland	32 500	37 300	42 000	47 000	49 500	58 000	56 200	68 200	70 800	73 400	65 000
Italy	3 184 000	3 156 300	3 080 000	3 015 000	2 770 900	2 934 300	2 830 000	2 701 600	2 733 200	2 670 000	2 600 000
Japan	320 000	321 000	280 600	278 800	278 400	254 400	252 300	256 100	n/a	n/a	n/a
Netherlands	220 000	251 800	310 000	333 000	333 000	356 300	334 000	347 400	351 100	355 500	360 000
New Zealand	38 200	38 400	41 300	60 600	65 600	74 500	77 000	81 700	86 000	91 800	87 400
Norway	43 000	44 200	46 200	50 000	55 000	56 200	57 800	61 000	63 300	65 800	67 000
Portugal	505 500	505 400	459 500	469 700	465 000	531 500	491 300	490 000	479 300	480 500	480 000
Romania	443 000	582 300	521 500	470 500	496 400	505 000	580 000	237 900	n/a	n/a	n/a
Russia	550 000	430 000	469 900	606 700	640 400	868 200	1 015 900	1 050 000	n/a	n/a	n/a
Spain	1 479 300	1 424 900	1 404 600	1 423 800	1 396 000	1 379 800	1 389 800	1 368 600	1 351 400	1 327 100	1 279 000
South Africa	384 641	390 948	389 238	390 284	388 400	348 700	350 900	345 000	340 700	355 700	356 100
Sweden	110 100	120 200	119 300	132 000	147 300	150 200	132 400	153 500	146 200	176 800	179 400
Switzerland	291 400	294 600	308 800	307 700	301 100	296 700	293 300	284 900	280 600	292 000	289 000
UK	829 000	836 900	914 600	979 400	991 600	1 062 200	1 072 900	1 200 000	1 170 000	1 370 200	1 348 300
USA	2 074 800	2 085 800	2 120 000	2 125 000	2 253 800	2 380 100	2 430 800	2 511 000	2 590 000	2 650 000	2 725 000
WORLD TOTAL	21 994 600	22 723 000	22 656 400	22 686 300	22 856 700	23 588 600	23 739 300	23 767 400	24 270 000	24 490 000	24 290 000

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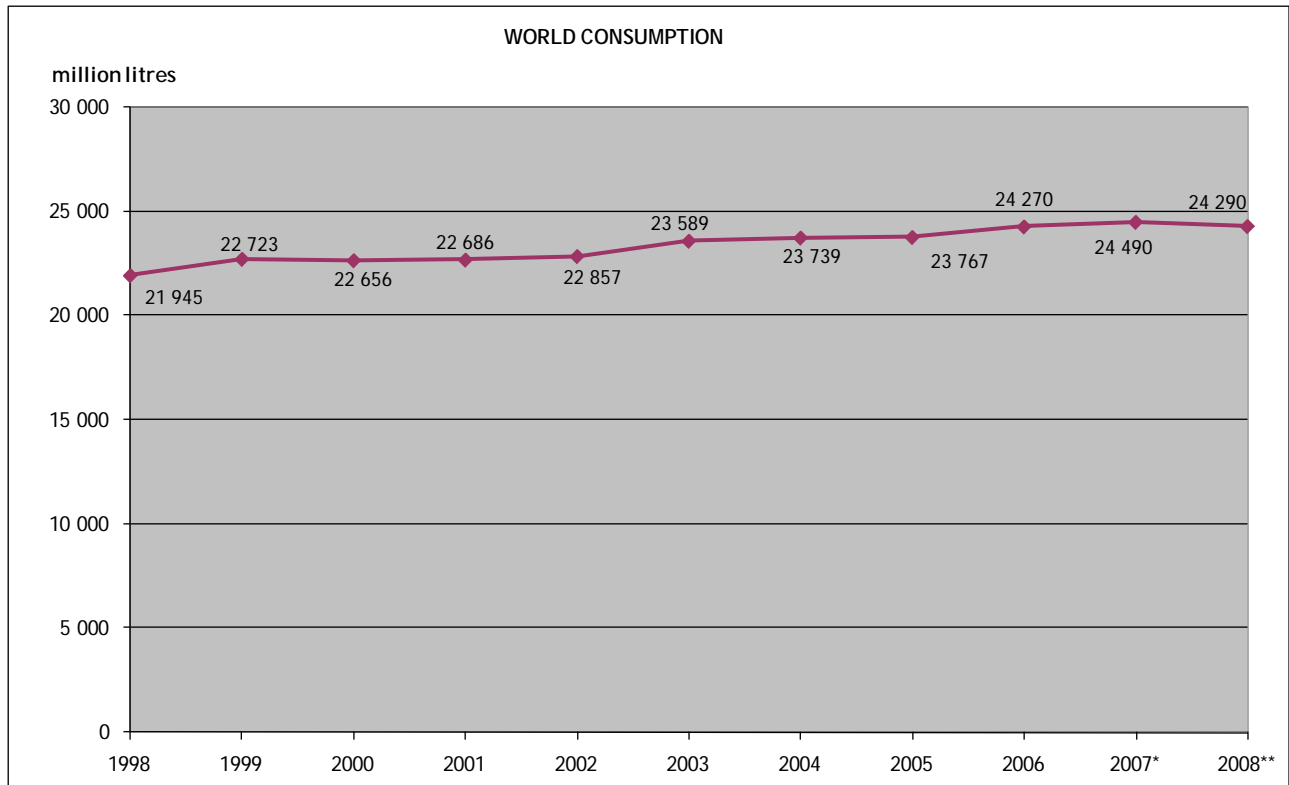
*Provisional

**Forecast

Source: OIV

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TOP 20 COUNTRIES IN 2005 - WINE CONSUMPTION (LITRES)		
Rank	Country	Volume
1	France	3 353 000 000
2	Italy	2 701 600 000
3	USA	2 511 000 000
4	Germany	1 984 800 000
5	Spain	1 368 600 000
6	China	1 350 000 000
7	UK	1 200 000 000
8	Argentina	1 097 200 000
9	Russia	1 050 000 000
10	Romania	580 000 000
11	Australia	452 300 000
12	Canada	371 900 000
13	Brazil	371 000 000
14	Greece	358 600 000
15	Hungary	350 000 000
16	Netherlands	347 400 000
17	South Africa	345 000 000
18	Switzerland	284 900 000
19	Chile	264 400 000
20	Japan	256 100 000

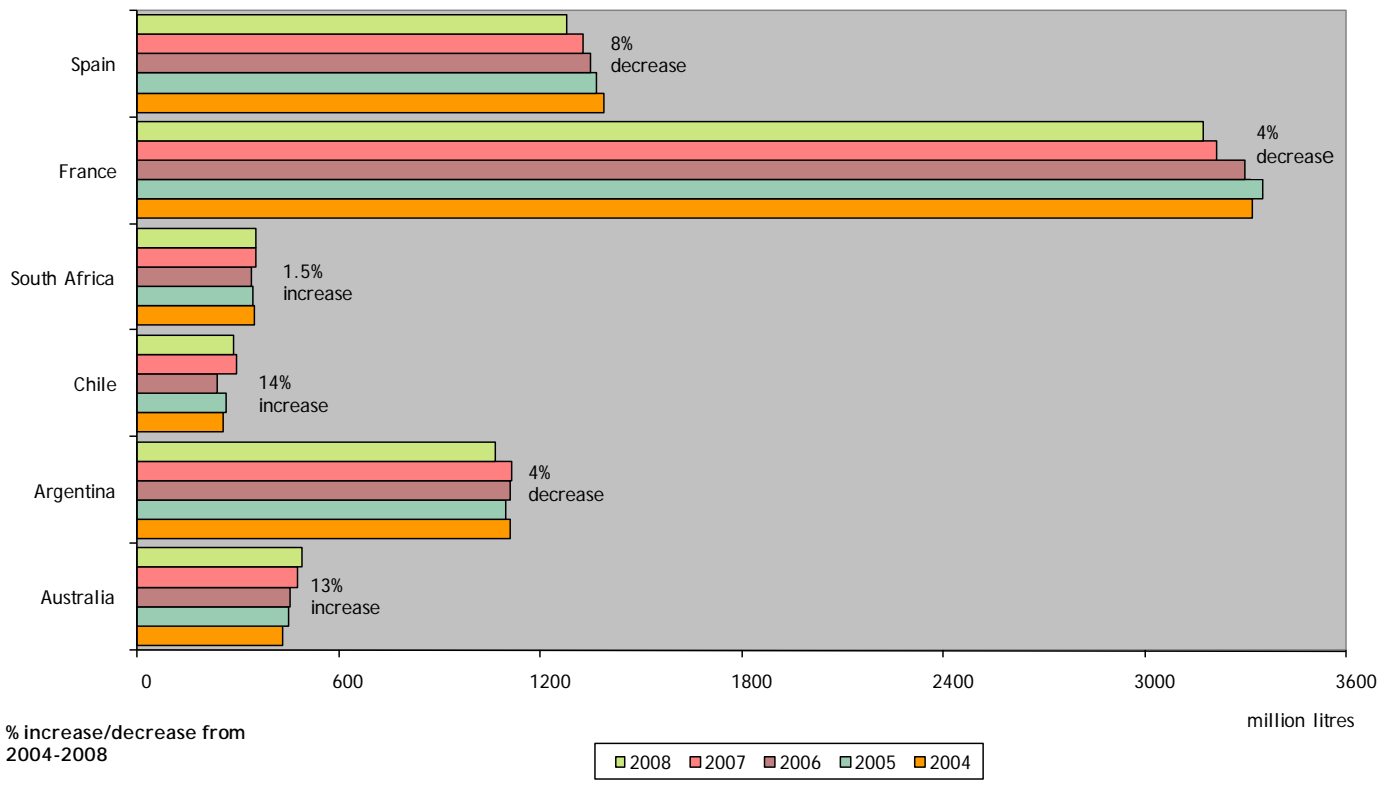


*Provisional

**Forecast

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WINE CONSUMPTION - SELECTED COUNTRIES



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3.2 Per captia consumption

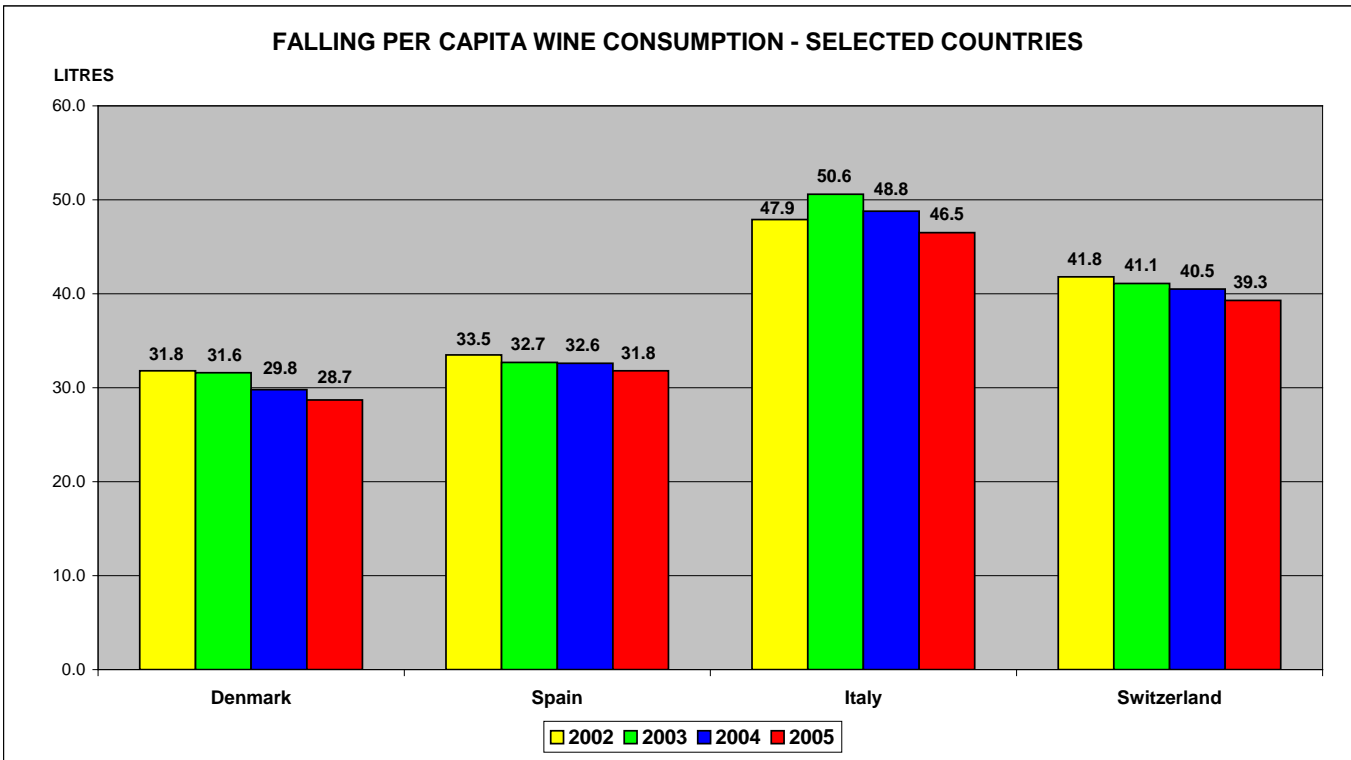
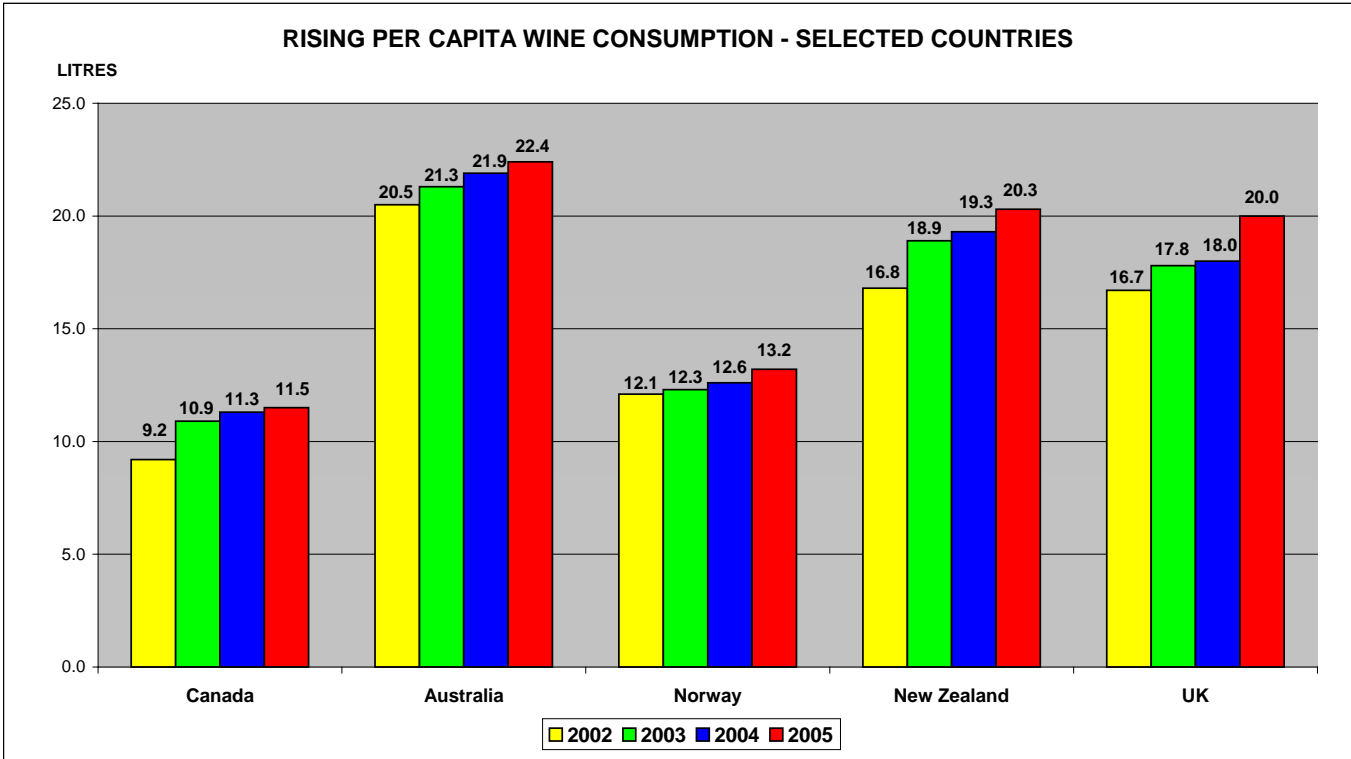
	litres										
	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Argentina	42.3	42.3	37.5	35.1	34.3	33.7	32.1	31.6	32.1	28.6	28.3
Australia	18.4	18.2	18.7	19.4	19.7	20.4	20.5	20.5	21.3	21.9	22.4
Austria	32	31.5	30.9	30.6	30.9	30.6	28.3	29.6	29.4	29.6	29.3
Belgium	25	25	25	19.4	20	24.3	23.4	26.5	25.3	26.5	26.8
Brazil	1.9	1.9	1.6	1.5	1.7	1.8	1.8	1.8	1.7	1.8	2.0
Canada	8	7.9	7.0	8.0	8.8	9.0	9.0	9.2	10.9	11.4	11.5
Chile	21.7	15.8	13.1	18.3	19.0	14.9	14.6	14.7	16.1	15.9	16.2
China	0.2	0.2	0.7	0.9	0.8	0.8	0.9	0.9	0.9	1.0	1.0
Denmark	27.6	28.3	30.2	30.1	29.5	30.5	33.2	31.9	31.8	30.0	28.7
Finland	8.2	7.6	5.0	6.1	6.5	6.8	7.4	8.0	8.7	9.1	9.4
France	63	60	60.6	61.8	59.9	58.2	56.9	58.2	56.7	54.8	55.4
Germany	22.2	22.8	22.9	23.1	24.0	24.5	24.3	24.6	23.9	23.7	24.0
Greece	34.5	34	25.2	27.2	28.2	26.2	26.9	22.1	22.3	29.8	32.2
Hungary	26.6	30.3	29.0	29.2	31.6	31.5	32.1	34.8	31.6	31.3	34.7
Ireland	16.1	15	7.8	8.7	9.9	11.0	12.2	12.7	14.7	14.1	16.4
Italy	53.2	55	53.7	55.4	54.9	53.5	52.4	48.2	51.1	49.3	46.5
Japan	1.3	1	1.9	3.1	2.6	2.1	2.2	2.2	2.0	2.0	2.0
Luxembourg	58.2	58	52	70	67.2	62.1	58.0	63.4	55.8	57.3	54.6
Netherlands	16.6	17.1	15.3	14.0	15.9	19.5	20.8	20.7	22.1	20.6	21.3
New Zealand	16.8	16.6	10.5	10.3	10.2	10.9	15.9	17.1	19.2	19.7	20.3
Norway	7.1	7.6	9.5	9.7	10.6	10.4	11.1	12.2	12.4	12.7	13.2
Portugal	58.4	60.6	52.5	50.7	50.6	45.9	46.8	46.3	52.6	47.9	46.7
Romania	28.8	31.5	28.8	24.0	25.9	23.2	21.0	22.2	22.6	26.0	11.0
Spain	30.6	30.3	36.2	36.6	35.1	34.5	34.8	34.1	33.6	33.8	31.8
South Africa	9.6	9.3	9.5	9.0	9.1	8.9	8.9	8.7	7.7	7.8	7.3
Sweden	12.6	13.3	11.9	12.4	13.6	13.4	14.9	16.6	16.9	14.9	17.0
Switzerland	43.6	43.3	40.5	40.6	41.1	43.1	42.9	42.0	41.4	40.9	39.3
UK	12.8	13.1	14.0	14.2	14.3	15.4	16.6	16.7	17.9	18.0	20.0
Uruguay	29.8	30.1	33.1	34.4	32.8	28.3	29.2	24.0	22.1	24.7	25.1
USA	6.8	7.3	7.5	7.4	7.4	7.4	7.4	7.7	8.1	8.2	8.4

Source: OIV

The 2006, 2007 and 2008 data are only available for selected countries, as a result the rankings are based on 2005 data (the latest complete data set).

TOP 20 COUNTRIES IN 2005 - PER CAPITA WINE CONSUMPTION (LITRES)		
Rank	Country	Litres
1	France	55.4
2	Luxembourg	54.6
3	Portugal	46.7
4	Italy	46.5
5	Slovenia	44.7
6	Croatia	40.8
7	Switzerland	39.3
8	Hungary	34.7
9	Greece	32.2
10	Spain	31.8
11	Austria	29.3
12	Denmark	28.7
13	Argentina	28.3
14	Belgium	26.8
15	Uruguay	25.1
16	Germany	24.0
17	Australia	22.4
18	Netherlands	21.3
19	New Zealand	20.3
20	UK	20.0

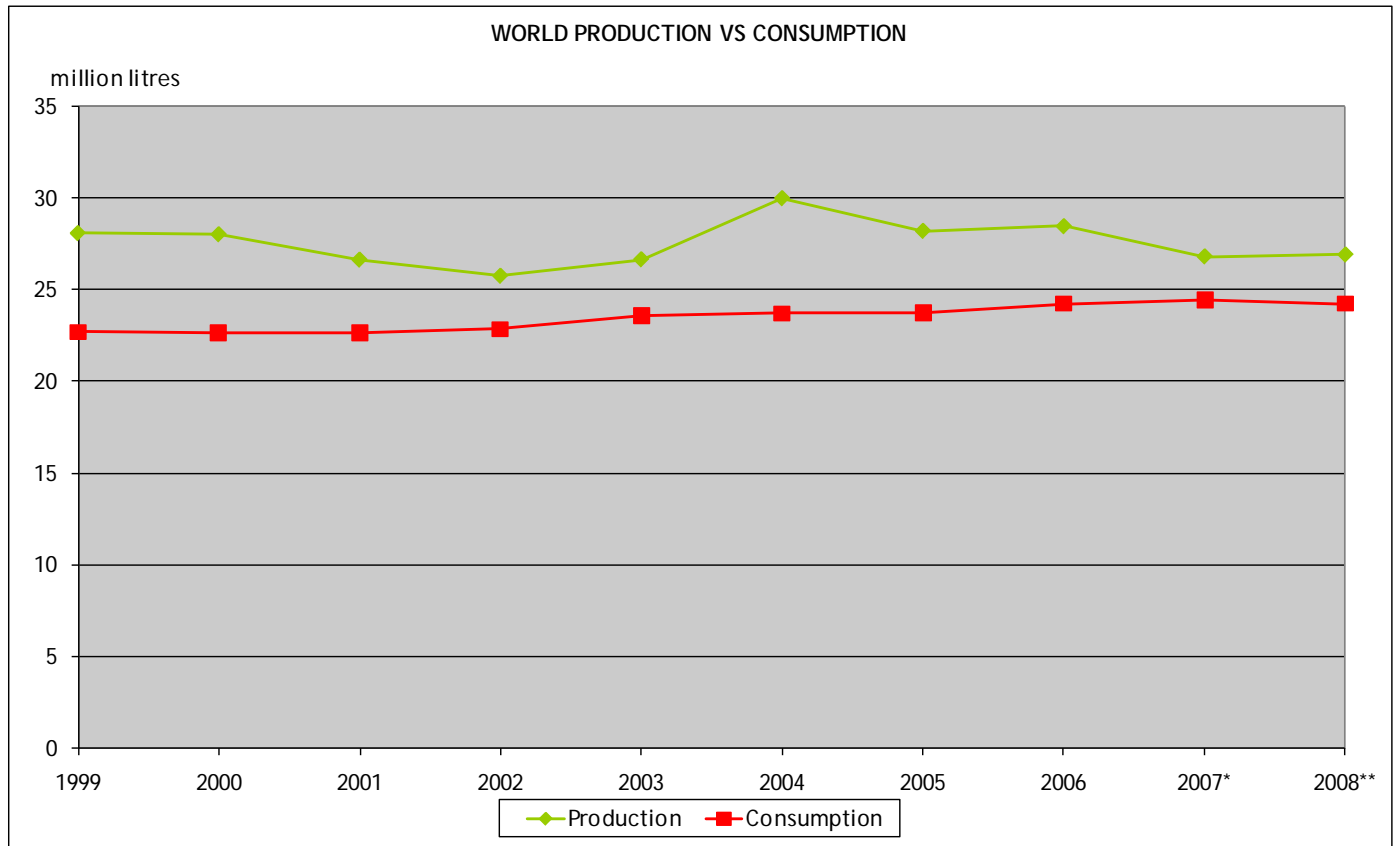
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4. COMPARISON BETWEEN PRODUCTION AND CONSUMPTION

	PRODUCTION	%	CONSUMPTION	%	DIFFERENCE
	Million Litres	CHANGE	Million Litres	CHANGE	Million Litres
1999	28 103.9		22 723.0		5 380.9
2000	28 041.5	-0.2	22 656.4	-0.3	5 385.1
2001	26 664.1	-4.9	22 686.3	0.1	3 977.8
2002	25 786.4	-3.3	22 856.7	0.8	2 929.7
2003	26 681.7	3.5	23 588.6	3.2	3 093.1
2004	30 002.1	12.4	23 739.3	0.6	6 262.8
2005	28 227.6	-5.9	23 767.4	0.1	4 460.2
2006	28 480.0	0.9	24 270.0	2.1	4 210.0
2007*	26 840.0	-5.8	24 490.0	0.9	2 350.0
2008**	26 940.0	0.4	24 290.0	-0.8	2 650.0



*Provisional

**Forecast

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5. INTERNATIONAL TRADE

5.1 Exports

In 2005, Africa and America were the only continents to experience a decrease in exports.

- Except for South Africa, who recorded a 5% increase, all the other African countries experienced a decrease in exports. As a result Africa exports dropped by 0.9% to reach 323 million litres in 2005;
- America saw the total volume of its exports decline by 3.4% from 1 027 to 992 million litres essentially influenced by a drop in exports from the USA, Chile and Canada;
- Overall European exports increased by 4.4% reaching 5 872 million litres, exceeding the level in 1999. Growth was experienced in all parts of Europe. The former USSR countries grew substantially to 360 million litres (+18.6% from 2004) with the continued increase of Moldavian and Georgian exports. Most of the EU countries experienced an increase in exports, with Italy, Spain and Germany acting as the biggest contributors to the growth in EU exports;
- Oceania once again improved its export performance by exceeding the 753 million litre mark in 2005, +10.3% from 2004. This evolution signifies a noteworthy trend of this continent towards world markets.

'000 litres

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007*	2008**
Argentina	108 904	88 050	84 302	88 162	123 400	185 200	155 300	214 800	293 400	359 800	414 100
Australia	192 404	258 342	310 491	375 096	471 500	536 500	642 600	701 900	759 500	785 000	698 500
Belgium	24 500	25 600	24 200	20 600	19 200	17 900	16 900	20 200	n/a	n/a	n/a
Brazil	7 800	7 500	7 100	5 600	2 300	1 500	3 000	3 600	n/a	n/a	n/a
Canada	1 400	1 500	2 500	2 900	1 800	3 100	2 500	1 900	n/a	n/a	n/a
Chile	229 801	229 800	264 700	308 900	355 300	402 900	474 000	420 900	474 000	610 000	588 500
China	3 300	4 500	4 200	3 000	2 300	2 100	2 000	4 900	n/a	n/a	n/a
Denmark	11 900	11 100	17 100	25 700	29 900	34 400	39 500	36 700	n/a	n/a	n/a
Finland	200	100	100	300	200	300	800	900	n/a	n/a	n/a
France	1 642 000	1 610 500	1 503 900	1 512 600	1 554 100	1 514 800	1 421 000	1 407 700	1 470 000	1 515 100	1 370 300
Germany	213 709	233 400	247 500	237 200	237 500	277 300	270 900	297 000	310 000	344 500	358 000
Greece	59 300	49 300	70 000	55 300	29 100	36 400	35 100	28 900	n/a	n/a	n/a
Ireland	3 100	400	300	400	600	600	200	600	n/a	n/a	n/a
Italy	1 557 000	1 832 000	1 467 500	1 537 100	1 518 700	1 328 300	1 412 300	1 572 100	1 800 000	1 880 000	1 720 000
Japan	400	400	500	800	600	700	400	400	n/a	n/a	n/a
Luxembourg	9 400	9 300	10 100	7 100	8 000	6 700	7 000	8 400	n/a	n/a	n/a
New Zealand	15 153	16 618	19 170	19 245	24 300	26 500	40 400	51 400	64 600	83 800	91 500
Norway	300	800	500	800	800	1 300	1 700	1 500	n/a	n/a	n/a
Portugal	229 800	196 900	194 100	160 600	214 100	316 200	322 900	262 000	290 000	350 000	310 000
Spain	1 024 900	930 800	865 100	994 600	959 400	1 235 900	1 404 200	1 443 900	1 430 000	1 528 300	1 647 500
South Africa	118 408	129 141	140 957	177 313	217 700	238 500	267 700	281 100	271 700	313 200	411 800
Sweden	2 000	1 200	900	1 500	2 300	5 900	7 500	5 400	n/a	n/a	n/a
UK	34 300	17 500	21 700	18 800	27 900	24 400	26 300	37 600	n/a	n/a	n/a
USA	272 300	290 600	294 200	284 400	266 200	329 300	387 400	345 900	380 000	420 000	463 800
WORLD TOTAL	6 559 900	6 452 300	6 099 200	6 457 700	6 730 700	7 252 300	7 685 500	7 973 800	8 460 000	8 980 000	8 910 000

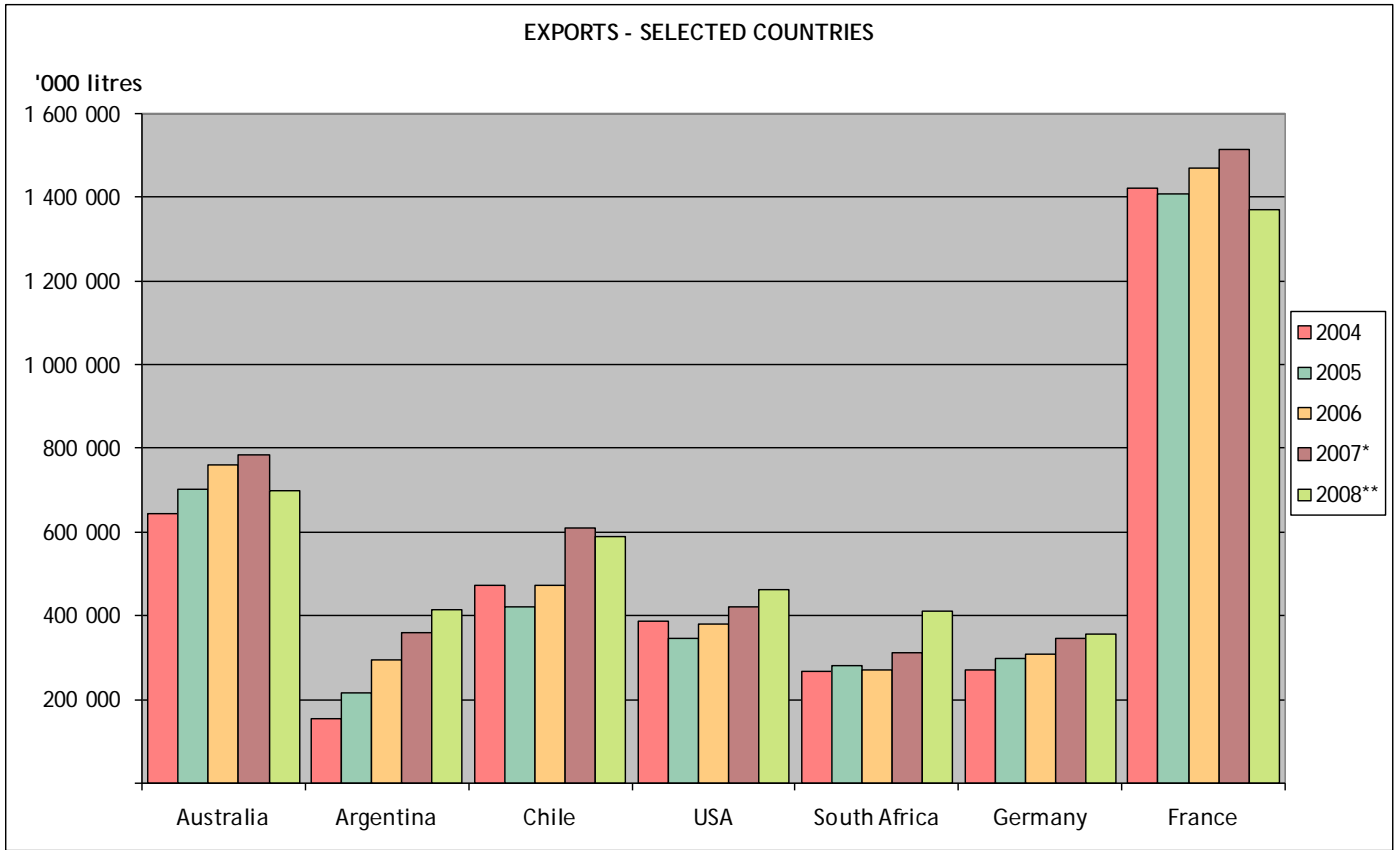
n/a - not available

*Provisional

**Forecast

Source: OIV

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5.2 Imports

- In 2005, African imports increased to 214 million litres (+18.9% from 2004). Angola remains the main importer and recorded a significant 29.7% increase in 2005;
- America increased its imports in relation to 2004 to reach 1 165 million litres (+9.1%). The USA, with 705 million litres imported in 2005, remain the 3rd world importer of wine. Canadian imports were at 281 million litres in 2005 (+5.3% from 2004);
- Asia, after the leap in Japanese imports in 1998, is moving back slowly with imports reaching 342 million litres (+6.7% from 2004) in 2005;
- Europe saw its total volume of imports increase and reach 5 936 million litres in 2005 (+3.9% from 2004), notably under the influence of the explosion of Russia's imports which reached 623 million litres (+23.3% from 2004). Germany remains the leading world importer with 1 326 million litres. Dutch imports continues to grow, reaching 380 million litres (+17.7% from 2004);
- In 2005, the level of imports to Oceania decreased by 14.4%. Despite a 20.2% decrease, New Zealand remains the leading import market.

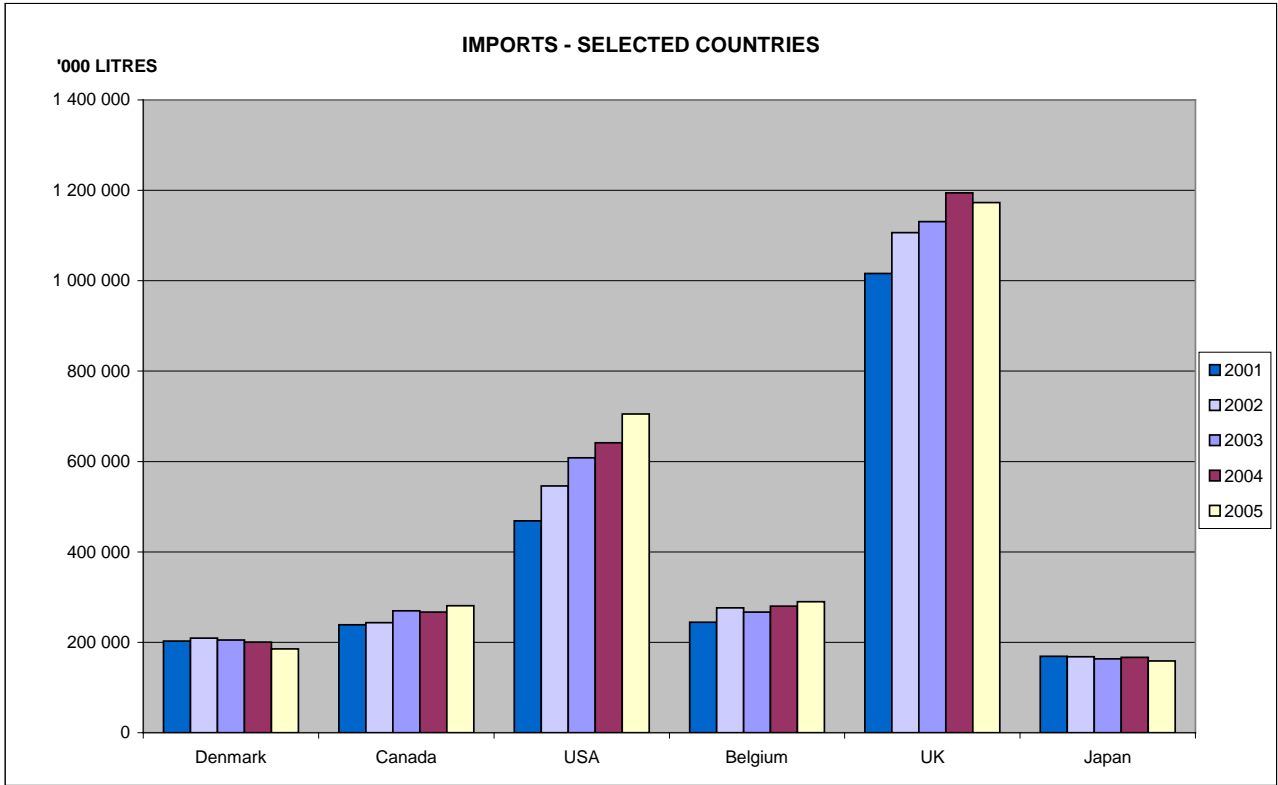
'000 litres

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Argentina	5 062	4 393	7 526	8 462	9 646	5 953	6 514	200	200	200	300
Australia	14 059	20 201	13 590	25 622	24 255	19 607	12 500	15 900	22 200	25 800	22 100
Belgium	229 900	227 900	227 900	238 700	223 600	255 200	244 600	276 300	267 000	280 100	289 700
Brazil	27 900	23 400	25 300	24 100	24 100	31 100	29 900	26 600	29 300	39 200	40 900
Canada	147 700	169 800	178 400	203 000	219 500	235 800	238 800	243 700	269 700	266 800	280 900
Chile	200	400	500	2 400	4 700	5 800	700	2 300	600	300	4 400
China	400	9 700	62 400	61 800	43 700	34 600	29 200	30 200	41 400	44 100	54 000
Denmark	129 800	152 500	167 900	174 500	167 700	179 400	202 900	209 400	205 100	200 600	185 200
Finland	28 200	26 400	26 800	30 800	32 700	35 200	38 200	41 700	47 600	47 700	49 300
France	612 700	530 600	582 600	554 900	574 800	550 200	513 600	458 800	479 900	551 400	549 500
Germany	877 000	1 161 600	1 218 090	1 299 620	1 288 800	1 215 300	1 126 800	1 171 000	1 190 600	1 304 300	1 326 200
Greece	4 000	2 400	6 300	6 600	7 000	6 000	7 200	10 700	31 100	24 400	12 900
Ireland	16 200	26 600	29 200	31 600	41 300	43 500	48 200	52 100	55 700	62 900	58 500
Italy	17 800	17 000	64 400	86 300	45 600	56 500	68 000	82 200	144 700	162 500	183 300
Japan	107 700	107 400	162 398	343 404	188 600	165 700	169 100	167 900	163 200	166 500	158 500
Luxembourg	22 900	n/a	n/a	n/a	n/a	n/a	19 200	20 900	19 700	19 700	23 200
New Zealand	25 515	21 318	22 409	28 231	27 853	28 556	40 200	40 200	47 200	45 000	35 900
Norway	32 000	36 600	42 000	43 300	48 000	46 800	62 300	61 000	68 500	72 800	76 100
Portugal	75 600	51 200	41 600	160 987	240 800	198 500	170 300	136 500	137 900	158 200	142 000
Spain	235 600	114 300	14 800	92 300	136 700	59 700	19 800	22 100	26 900	30 200	33 400
South Africa	494	16 565	14 363	8 373	15 445	7 944	2 719	5 300	6 800	1 300	18 200
Sweden	87 400	114 400	106 000	112 100	121 400	119 200	136 400	151 600	156 000	152 800	158 800
UK	639 400	834 800	884 500	928 000	950 900	924 100	1 016 100	1 106 600	1 130 700	1 194 500	1 172 700
USA	275 300	359 300	421 200	415 300	428 600	440 166	468 800	546 000	608 200	641 500	705 200
WORLD TOTAL	4 977 400	5 232 000	5 816 800	6 305 900	6 176 300	6 117 600	6 118 200	6 504 000	6 885 900	7 363 600	7 728 600

n/a - not available

Source: OIV

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