



INTERNATIONAL ORGANISATION OF VINE AND WINE

STATE OF THE VINE AND WINE SECTOR

OIV Press Conference

John Barker, OIV Director General
25 April 2024

OIV



2023 DATA

Vineyard Surface Area

Wine Production

Wine Consumption

International Trade in Wine

2024 First Estimates

Wine Production in Southern Hemisphere

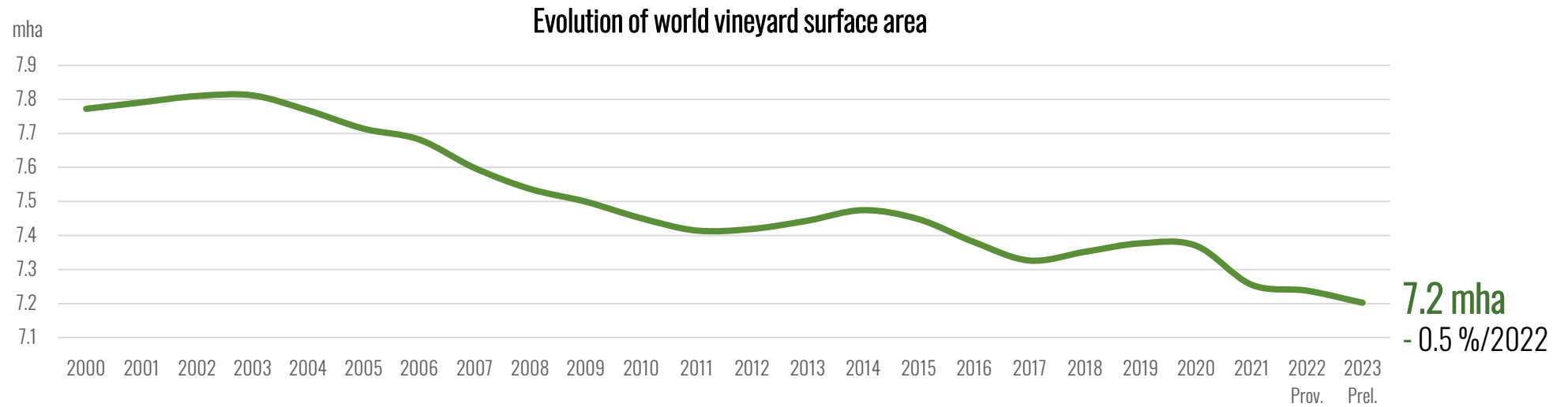
**Challenges & Opportunities:
Looking Ahead**



Vineyard Surface Area

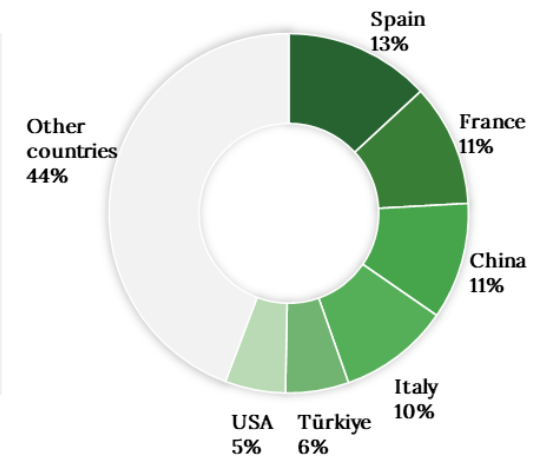


Vineyard Surface Area



The world's vineyard surface area continued its decline, shrinking by 0.5% from 2022 to 7.2 million hectares. This trend, observed for the third consecutive year, was driven by the removal of vineyards in major vine-growing regions (including all types of grapes) across both hemispheres.

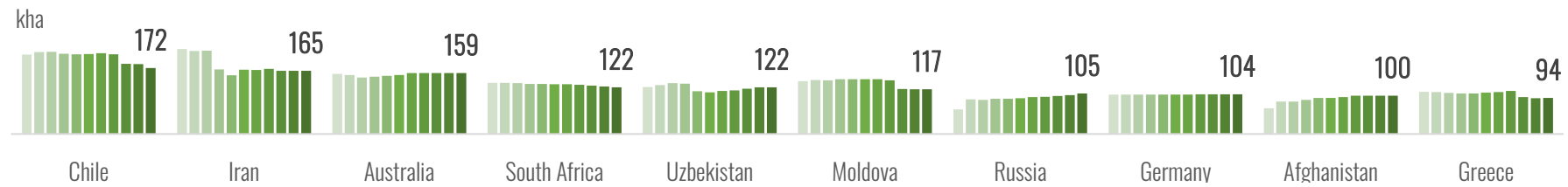
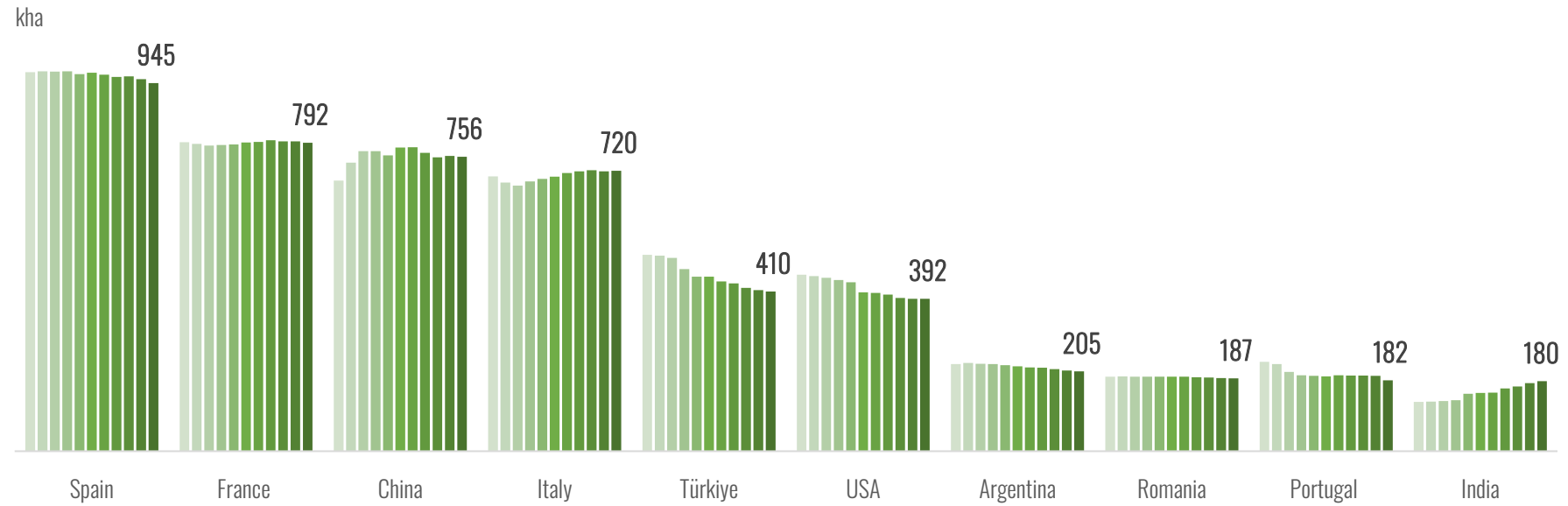
In 2023, the top 6 countries represent 56% of the world total, while the EU and the Southern Hemisphere account for 45% and 12%, respectively.

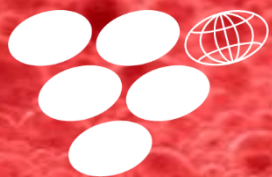




Vineyard Surface Area

Major countries by vineyard surface area, 2014-2023



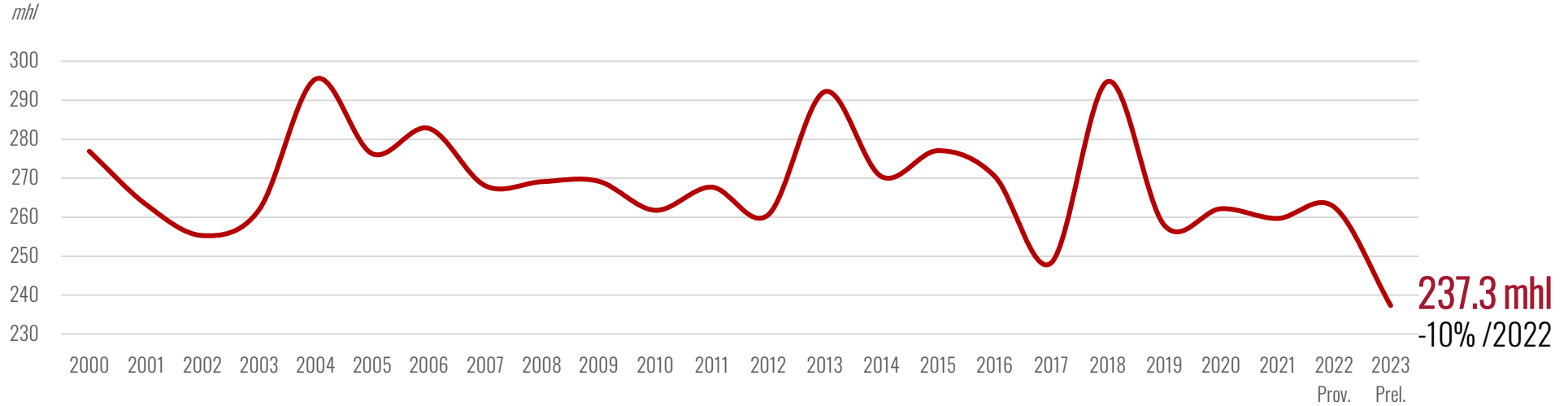


Wine Production



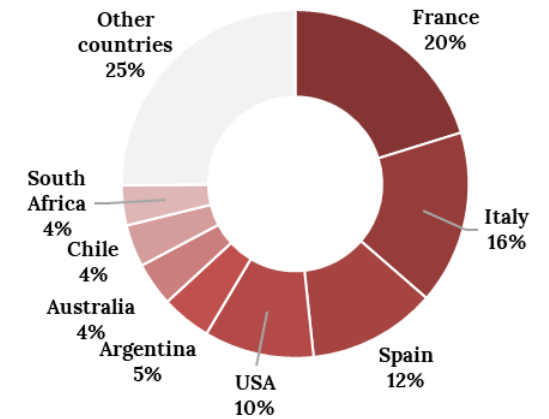
Wine Production

Evolution of world wine production



Extreme climatic conditions and widespread fungal diseases severely impacted many vineyards worldwide, culminating in a **historically low global wine production of 237 million hectolitres**. This marked a **10% drop from 2022** and represented the **lowest output since 1961**.

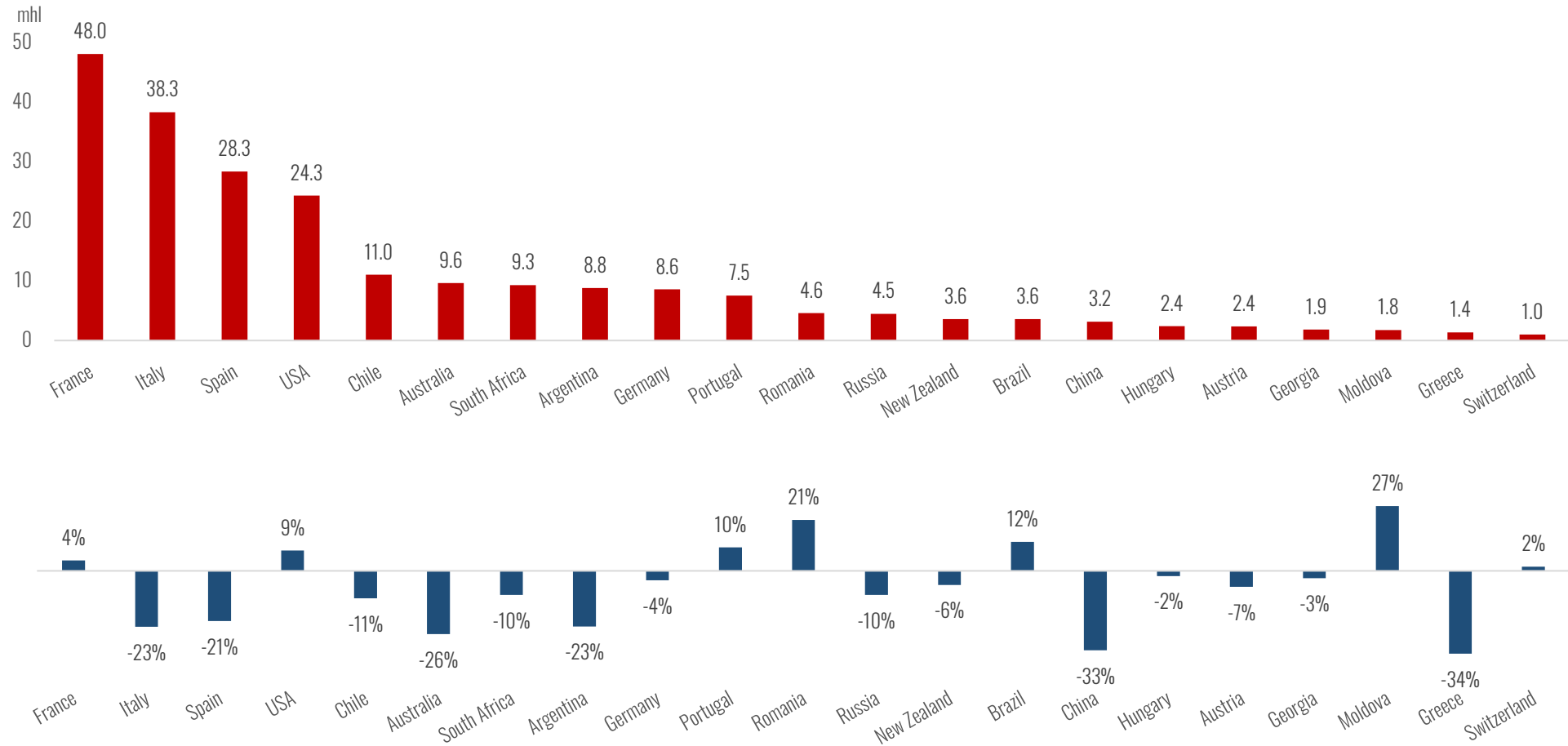
Very low production volumes were recorded in both the **EU (145 mhl, -11%/2022)** and the **Southern Hemisphere (47 mhl, -15%/2022)**.





Wine Production

Major wine producing countries in 2023



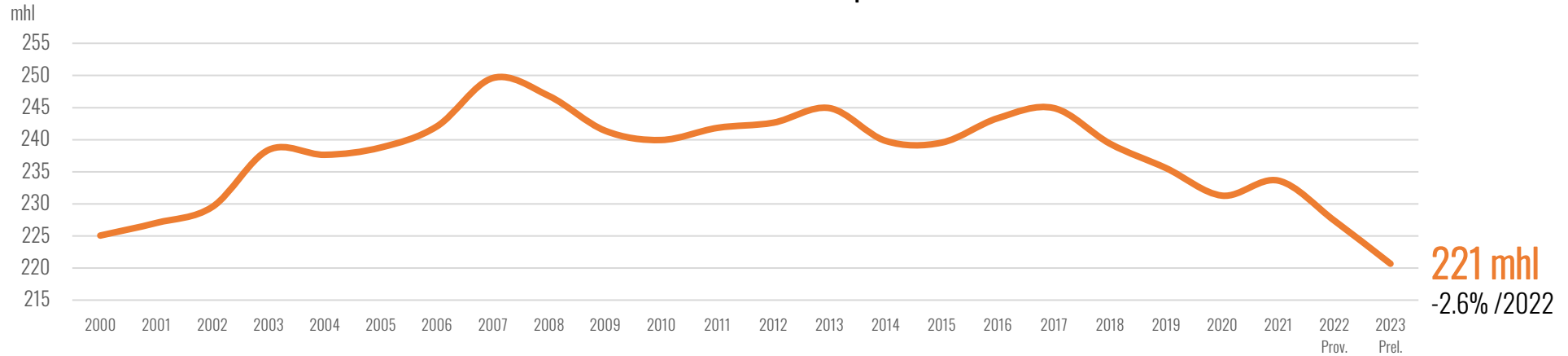


Wine Consumption



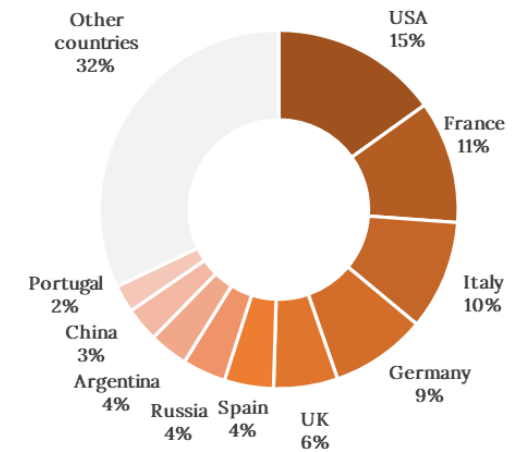
Wine Consumption

Evolution of world wine consumption



Global wine consumption in 2023 is estimated at **221 million hectolitres**, indicating a decrease of **2.6% compared to 2022's already low figures**. The spike in production and distribution costs, driven by **inflationary pressures**, led to higher wine prices for consumers, who were already dealing with diminished purchasing power. Despite these challenges, **a few major markets demonstrated resilience**.

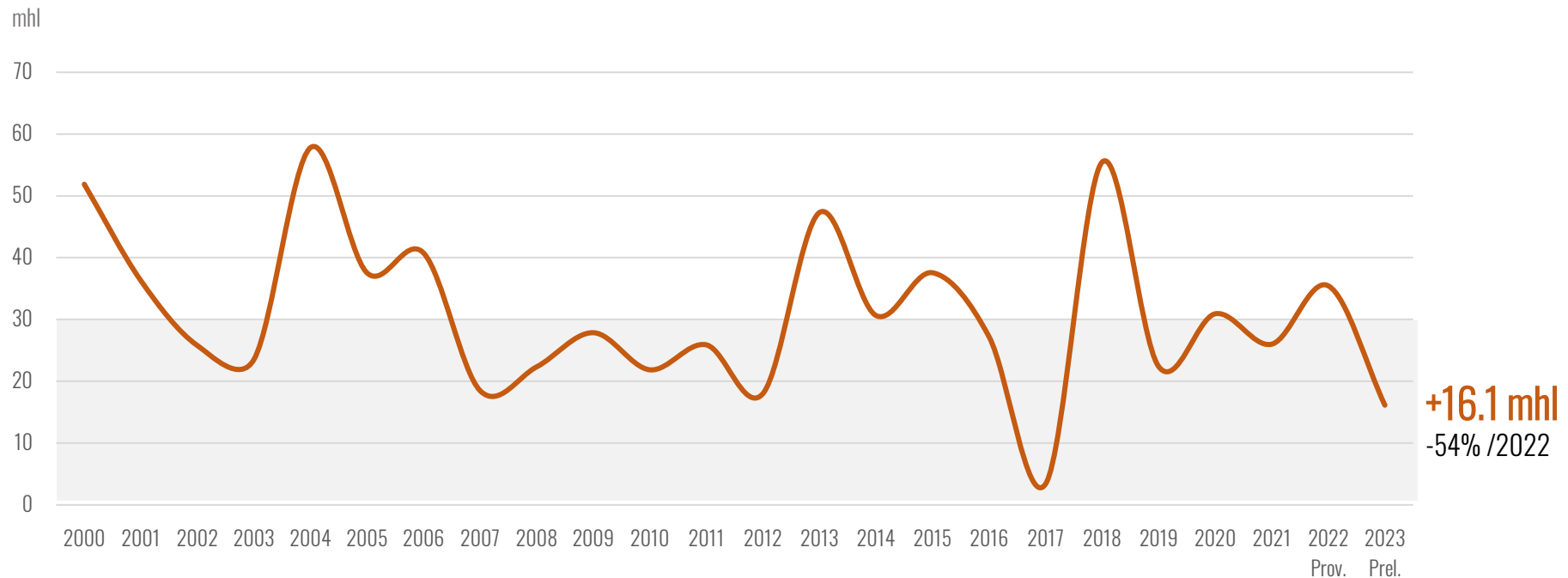
More than two-thirds (68%) of global consumption is concentrated in the top 10 markets, with the top 5 consuming countries representing 51% of the world total. The EU (107 mhl, -2%/2022) accounts for 48%.





Wine Consumption

Evolution of world wine production-consumption gap

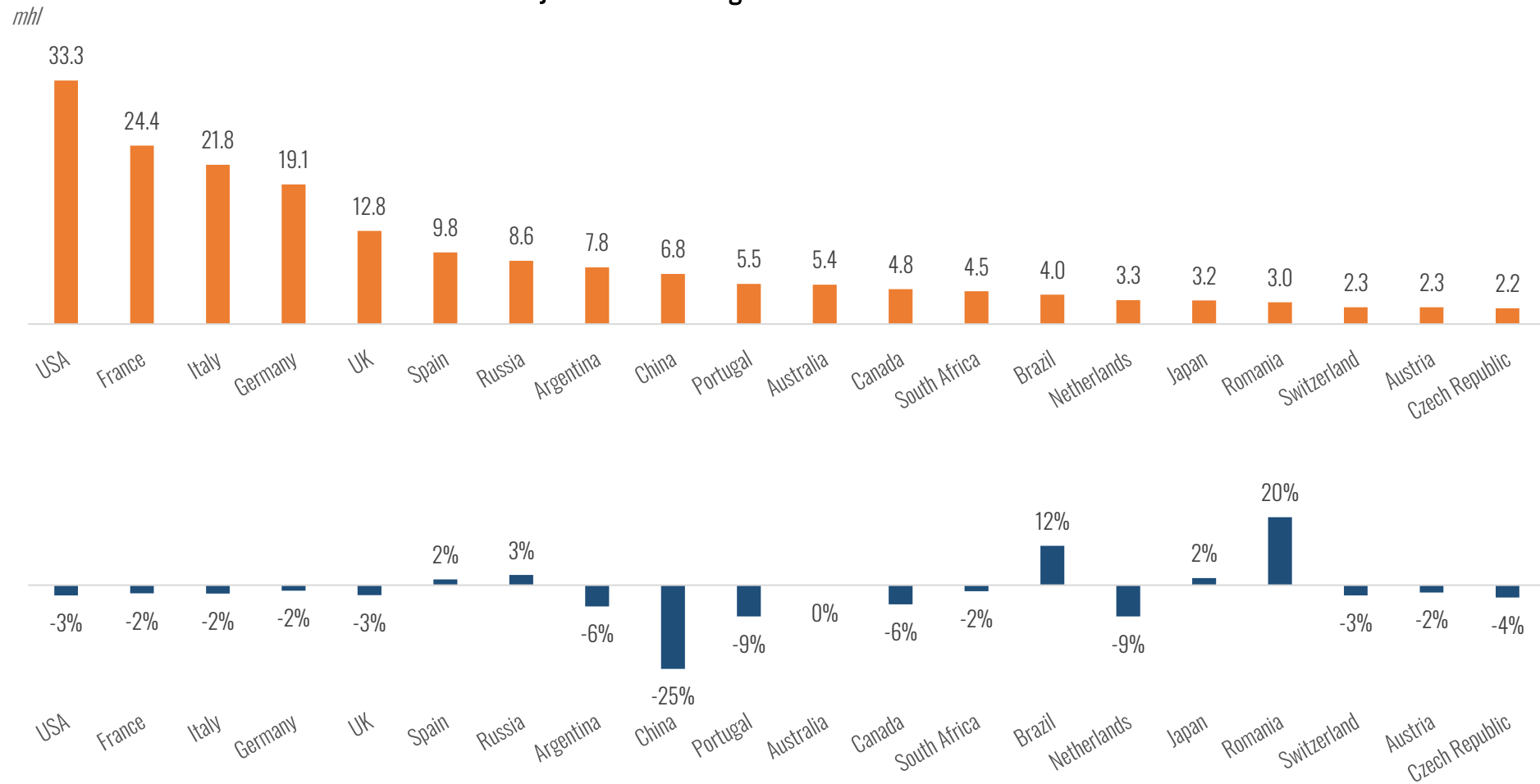


The difference between wine production and wine consumption is estimated at +16.1 mhl (-54% / 2022). Considering that every year between 25 and 35 mhl of the total wine production are destined for industrial uses (i.e. distillation, vinegar, wine-based beverages, etc), the low production volume of 2023 is expected to bring equilibrium to the world market.



Wine Consumption

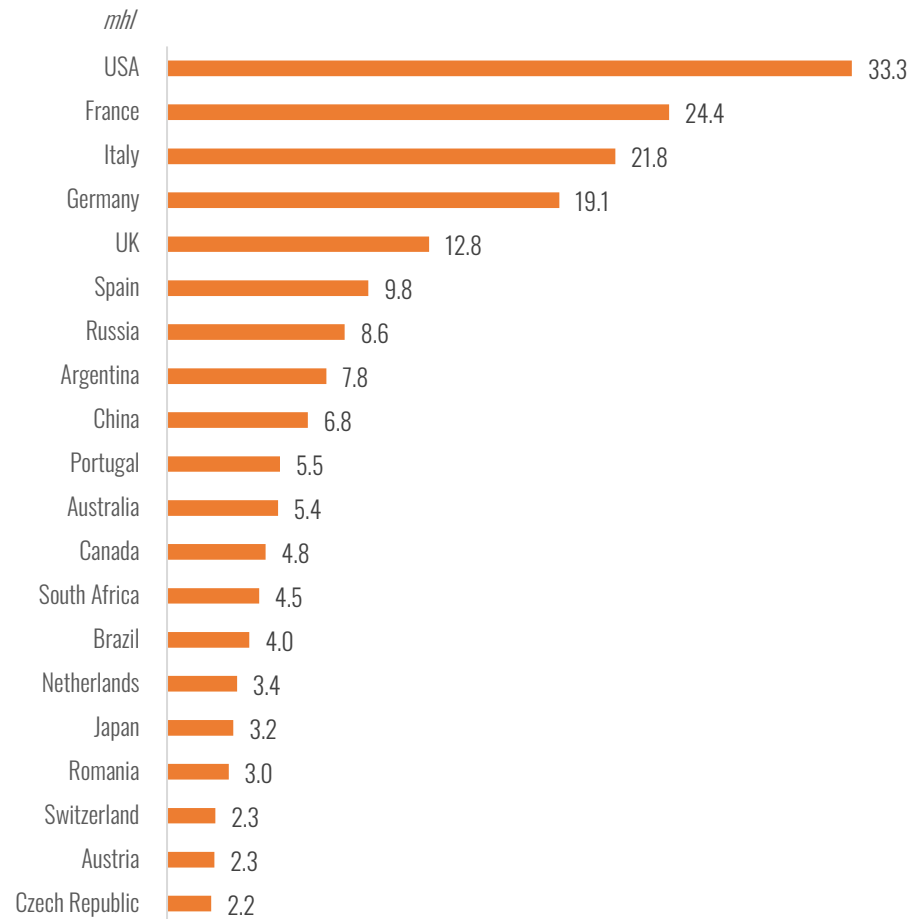
Major wine-consuming countries in 2023



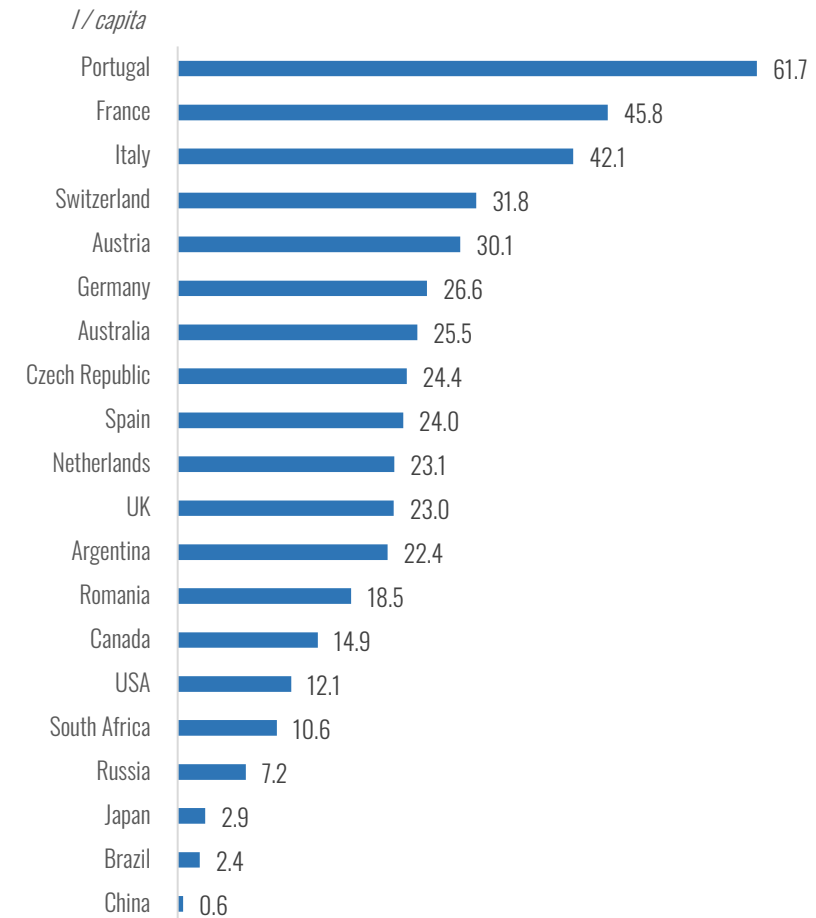


Wine Consumption

Major countries* by total consumption in 2023



Consumption per capita +15 in major consuming countries* in 2023



*Countries with 2023 wine consumption above 2 mhl

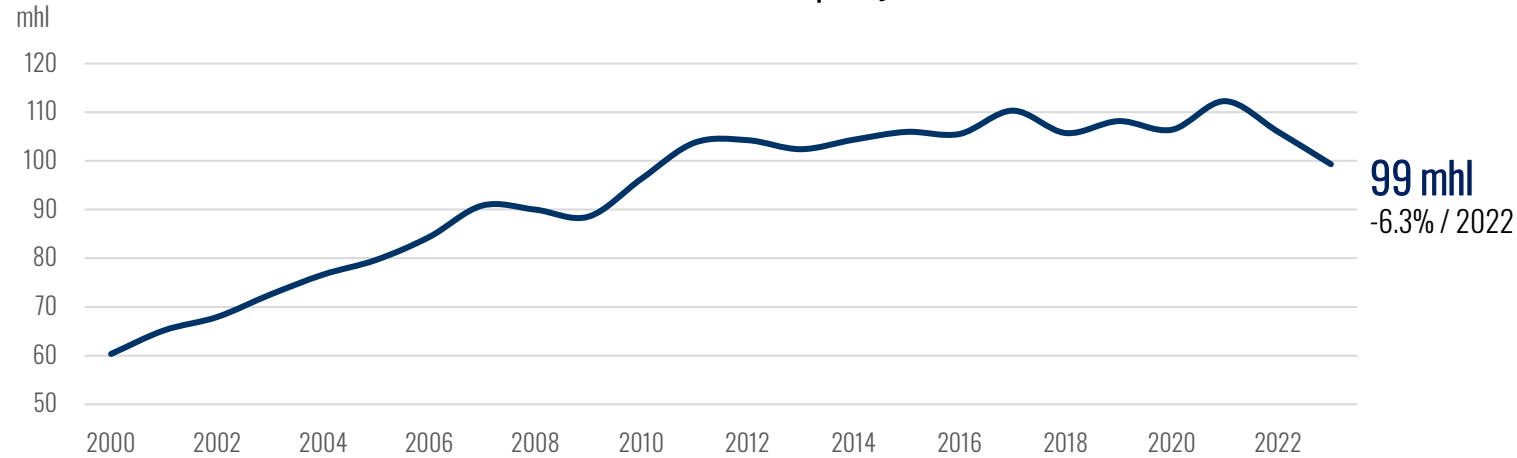


International Trade in Wine



International Trade in Wine

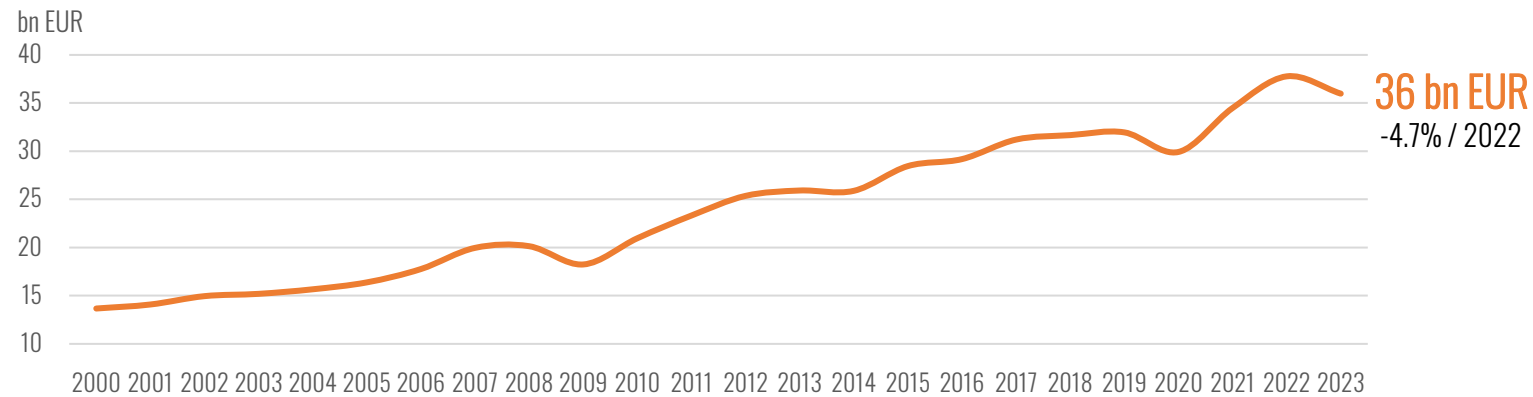
Evolution of world wine export by VOLUME



99 mhl
-6.3% / 2022

World wine exports in 2023 have **decreased by 6.3% in volume** compared to 2022, recording the **lowest volume since 2010**.

Evolution of world wine export by VALUE



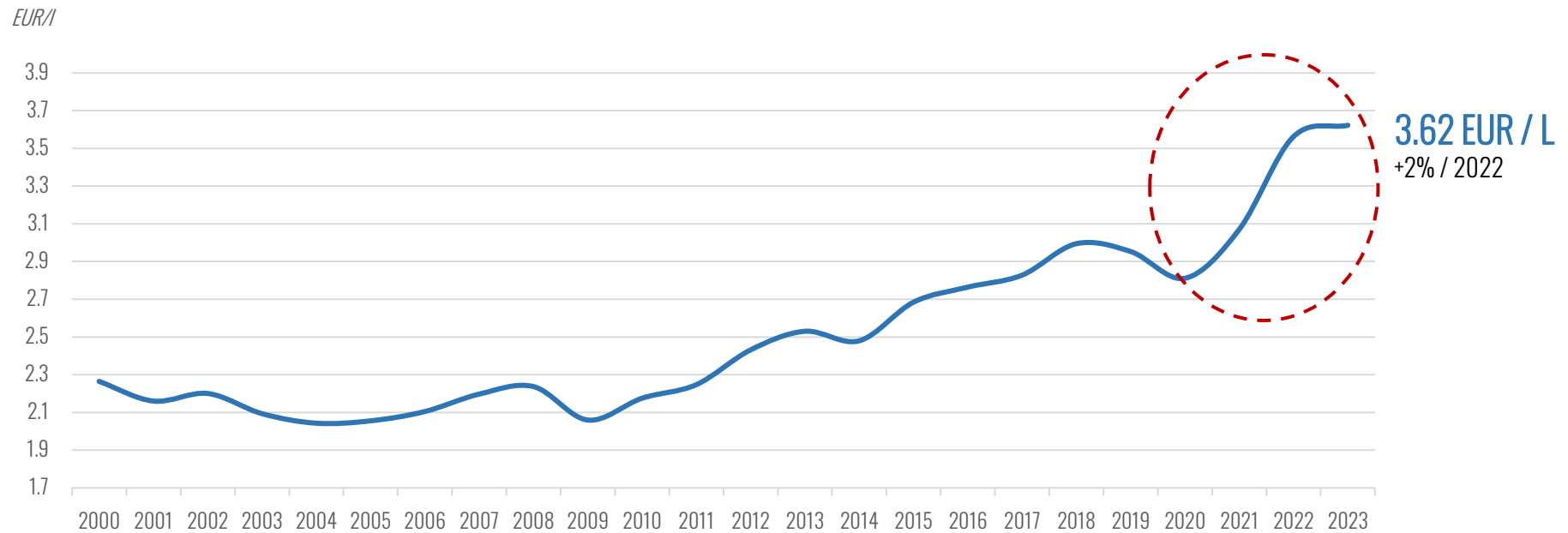
36 bn EUR
-4.7% / 2022

Despite a **4.7% decrease** compared to the record high of 2022, the global wine export value in 2023 reached **36.0 billion EUR**, the **second highest ever recorded**.



International Trade in Wine

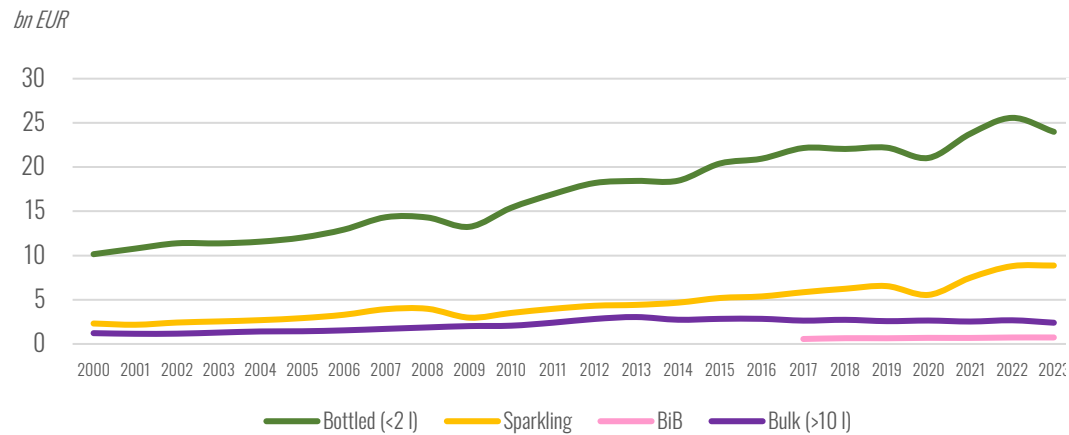
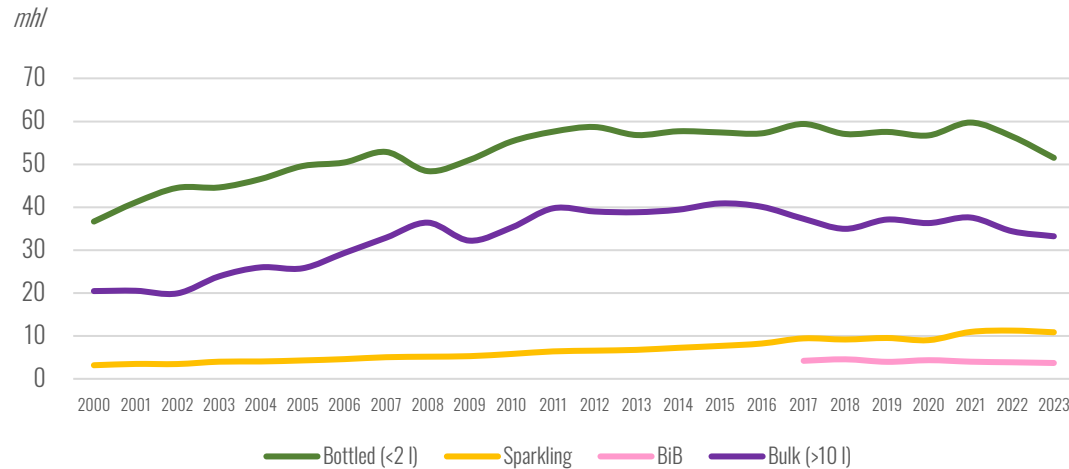
Evolution of world average export price



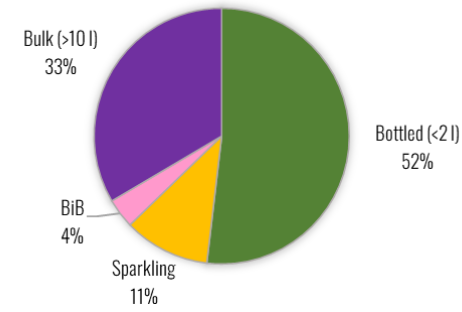
The average world export price of wine in 2023 peaked at **3.62 EUR/L**, the **highest ever recorded**. This represents a **significant increase of 29% since 2020**. This rise in prices primarily stems from higher costs incurred by producers, importers, and distributors, a **direct consequence of global inflationary pressures**.



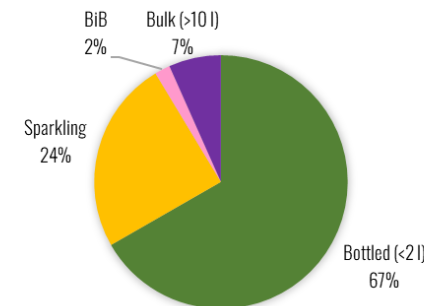
International Trade in Wine



Breakdown of global trade VOLUME in 2023



Breakdown of global trade VALUE in 2023



Bottled

Volume: -9% / 2022

Value: -6% / 2022

Sparkling

Volume: -4% / 2022

Value: +1% / 2022

Bag-in-Box (BiB)

Volume: -4% / 2022

Value: +0% / 2022

Bulk

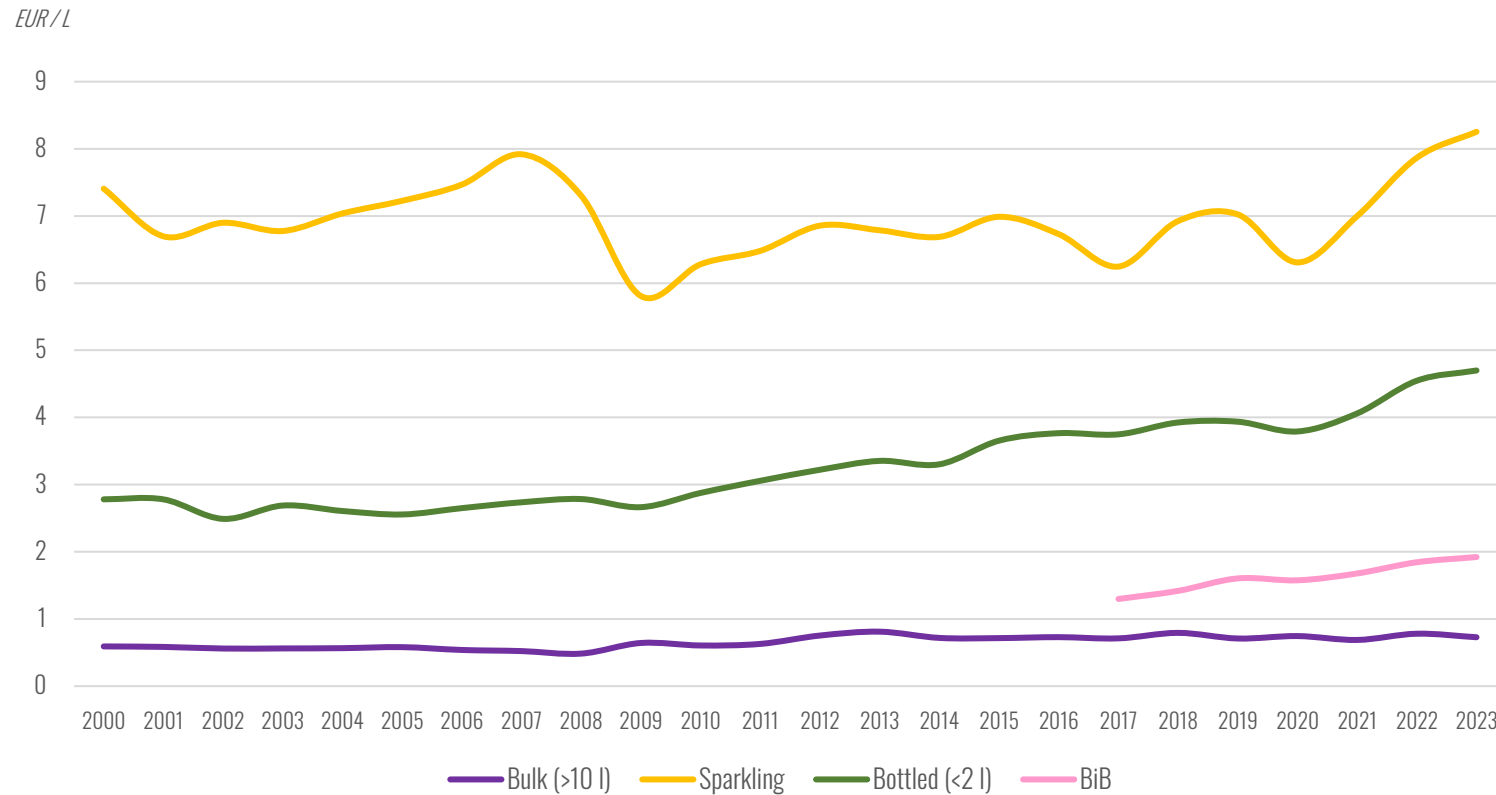
Volume: -4% / 2022

Value: -10% / 2022



International Trade in Wine

Evolution of world average export price by category



Sparkling

+5%/2022

+31%/2020

Bottled

+3%/2022

+24%/2020

Bag-in-Box (BiB)

+4%/2022

+22%/2020

Bulk

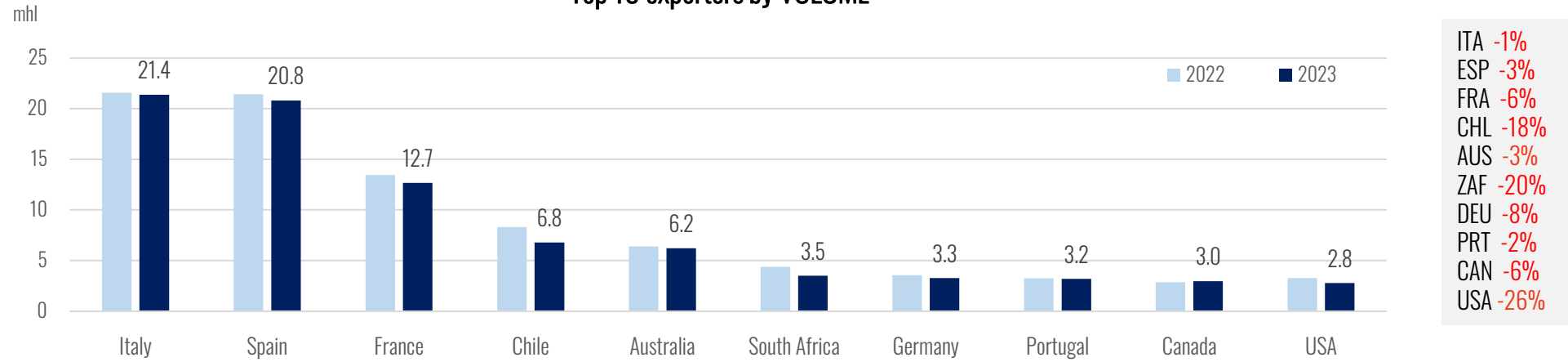
-7%/2022

-2%/2020

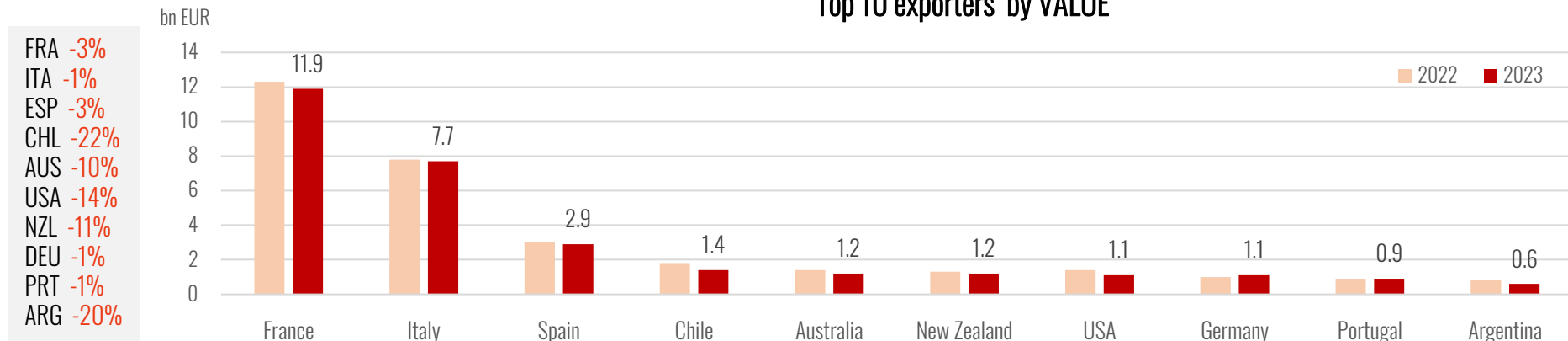


Main Wine Exporters

Top 10 exporters by VOLUME



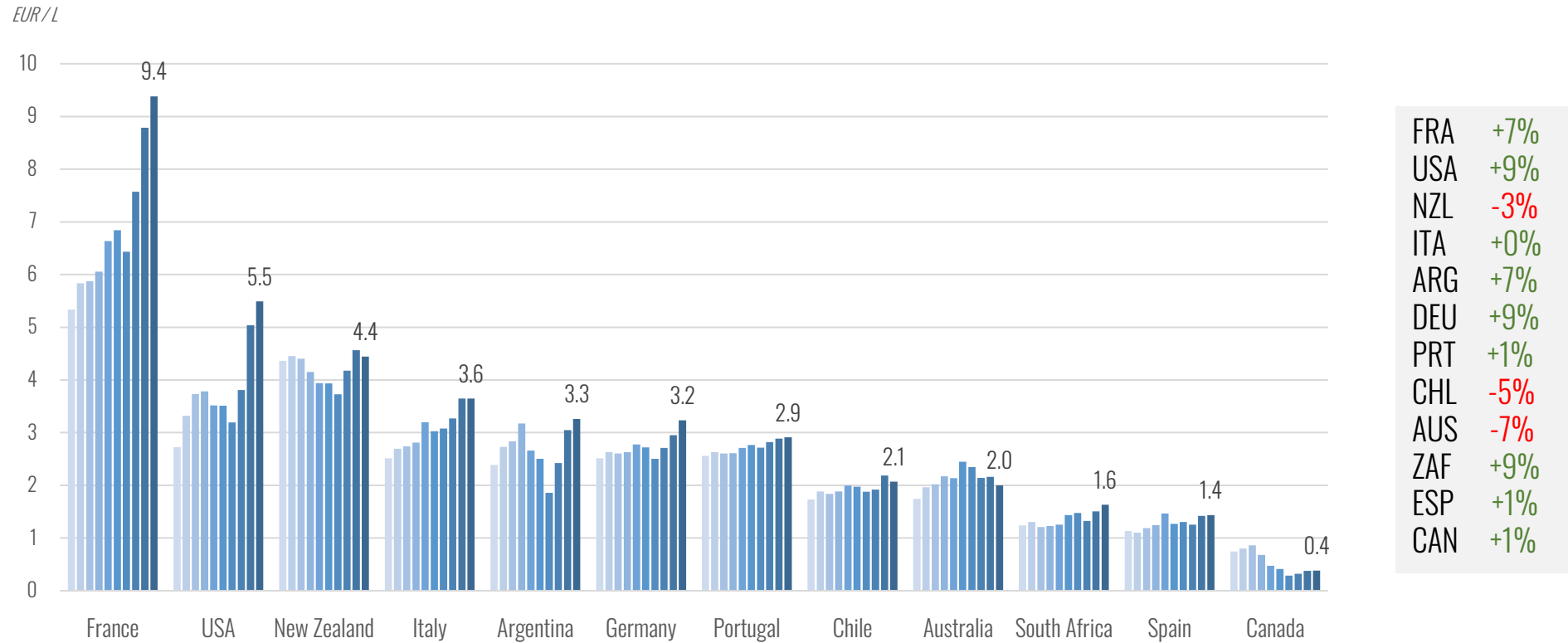
Top 10 exporters by VALUE





Main Wine Exporters

Major Exporters by Average Export Price, 2014-2023

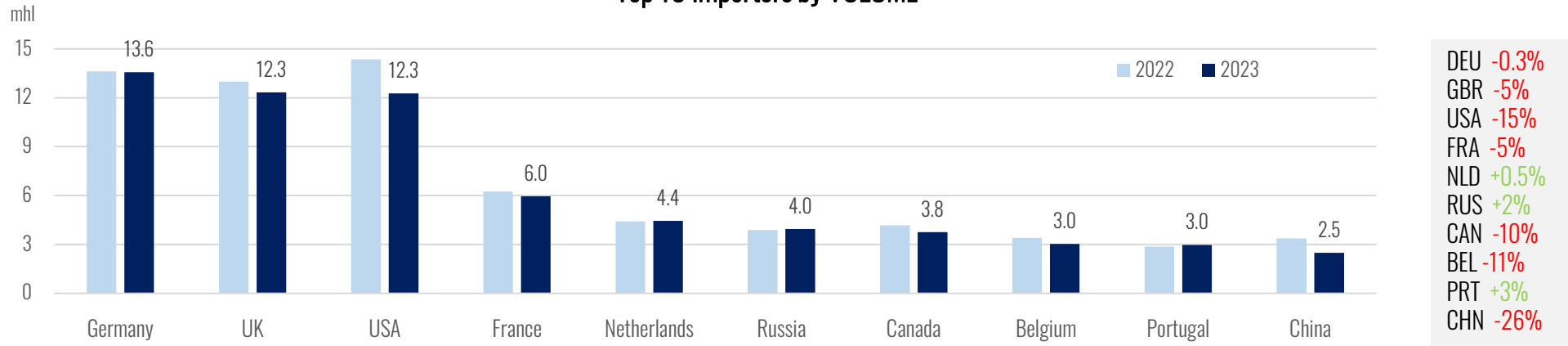


*Countries listed as top 10 exporters, by volume or value in 2023

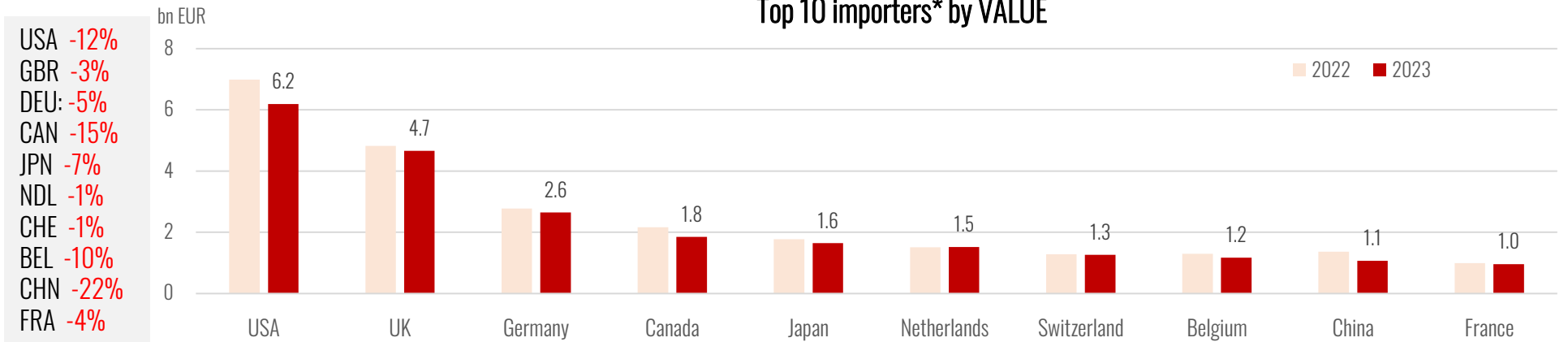


Main Wine Importers

Top 10 importers by VOLUME



Top 10 importers* by VALUE



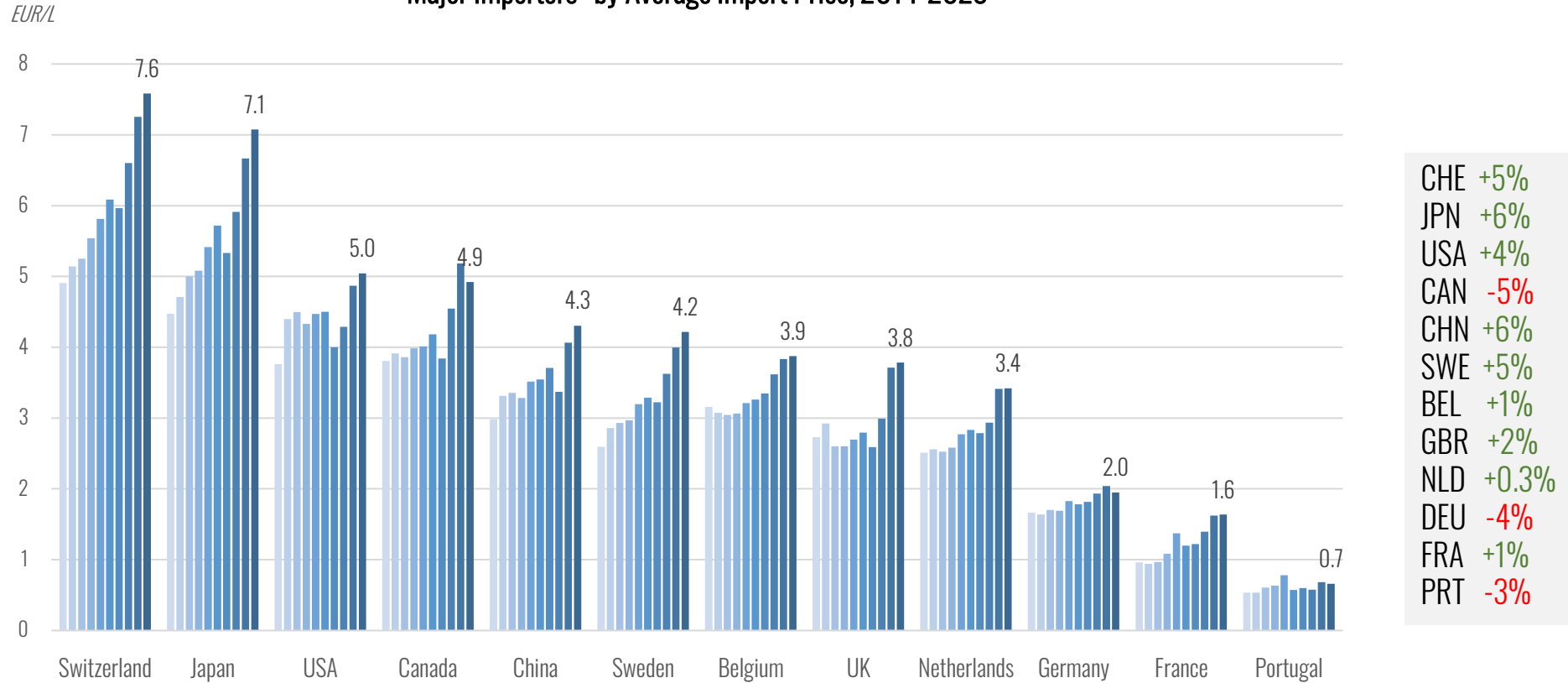
*data on Russia not available





Main Wine Importers

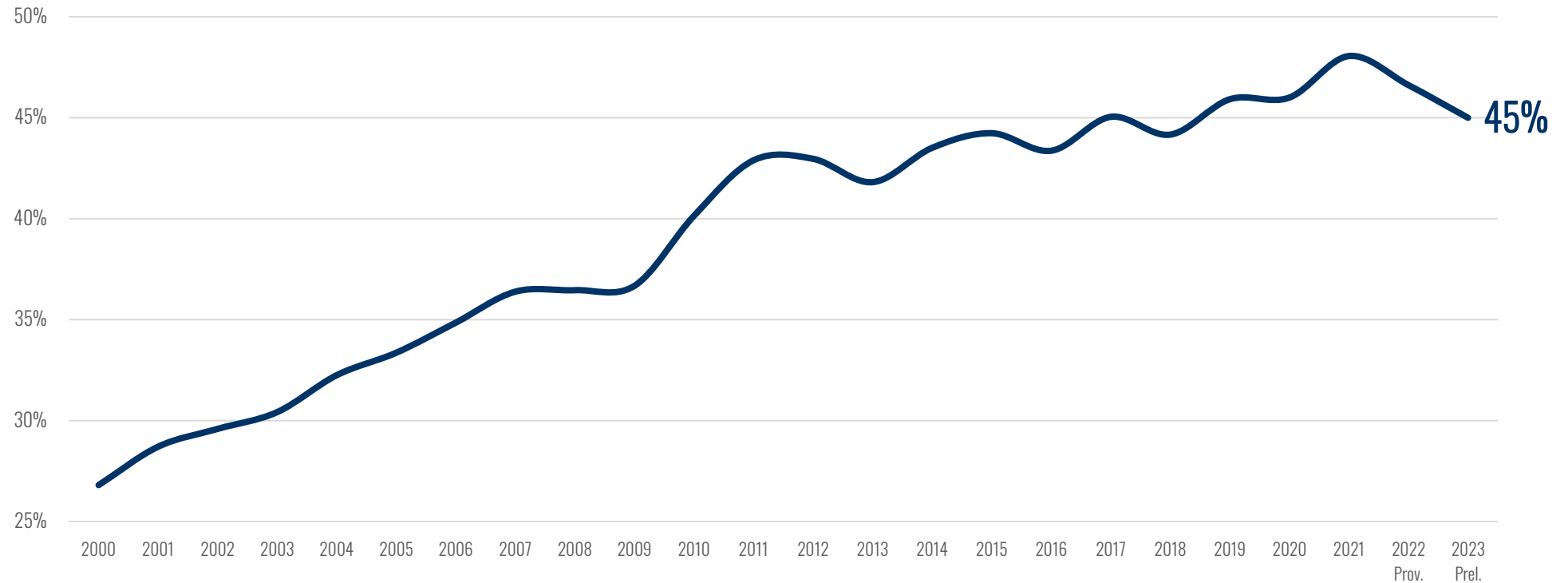
Major Importers* by Average Import Price, 2014-2023



*Countries listed as top 10 importers, by volume or value
*data on Russia not available



Market Internationalisation Index



Wine market internationalisation index = ratio between the volumes of world wine exports and world wine consumption

→ **45% of the wine consumed worldwide in 2023 is imported wine**, a sign that the world wine market is highly globalised

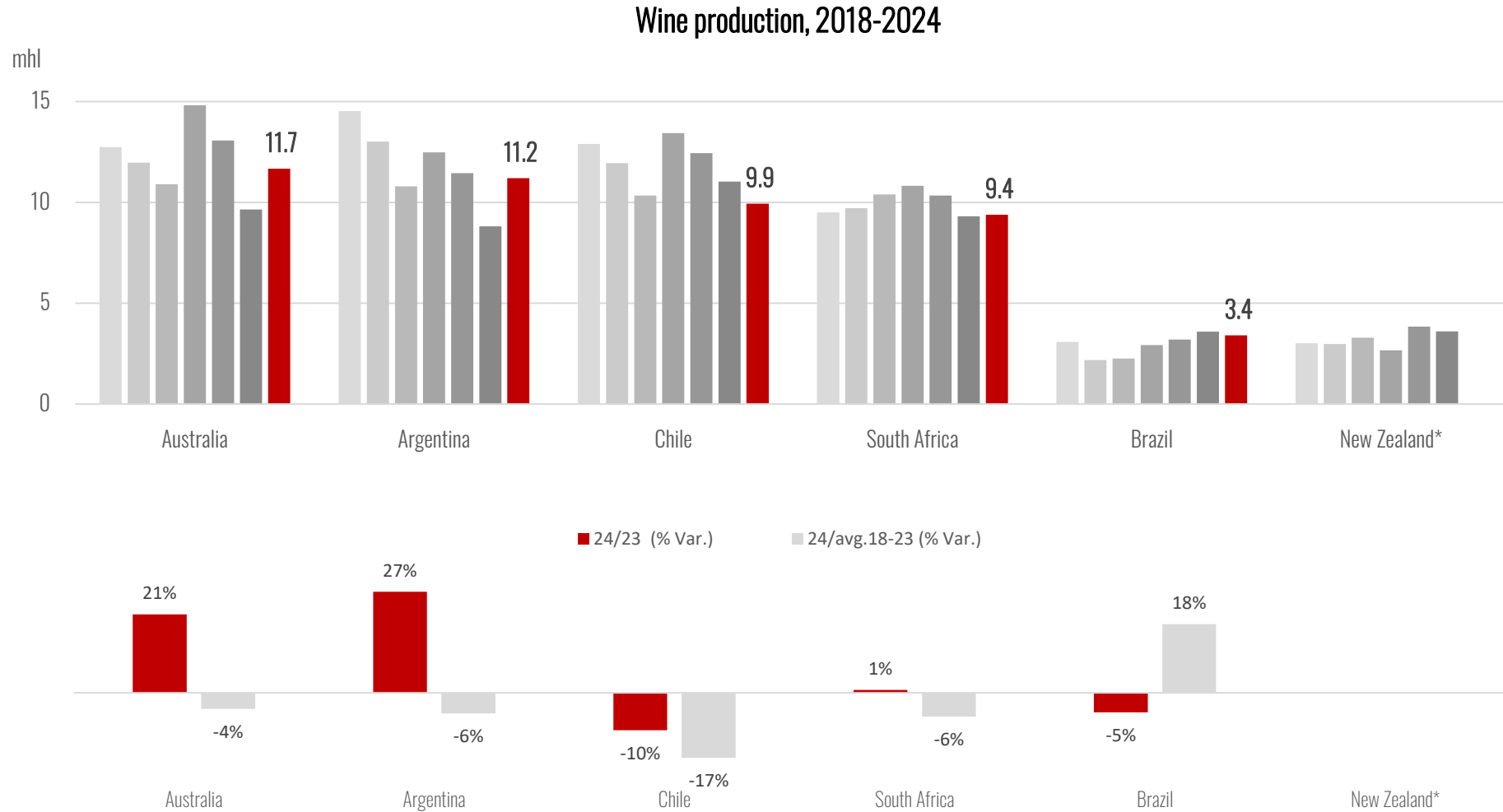


Wine Production in the Southern Hemisphere in 2024

First Preliminary Estimates

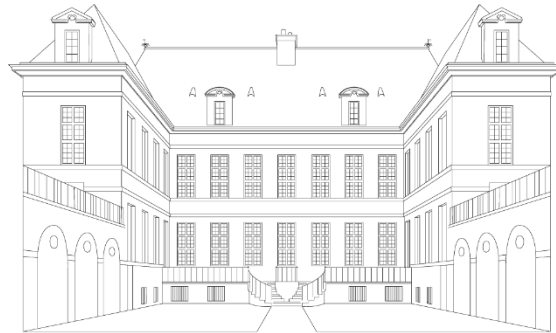


Preliminary Estimates Wine Production 2024



*Data 2024 not available yet

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