World vitiviniculture situation

- Surface area
- Grape
  - Global grape production
- Wine
  - Production
  - Consumption
  - Trade

- 2016 FAO-OIV Focus: Table and Dried Grapes
Global area under vines
Area under vines in the world

Trend, 2000-2015

7.5 mha global area under vines in 2015

Share of countries in world area surface

5 countries represent 50% of world vineyard

Spain 14%
China 11%
France 10%
Italy 9%
Turkey 7%
Rest of the world 50%
Area under vines

Since 2000:

- Area under vine is **decreasing** in Europe, Turkey and Iran
- **Strong increase for China**, which has now the 2\textsuperscript{nd} world largest vineyard.
- **Stabilisation** in the USA and South Hemisphere countries
Grape
Major grapes producers: all use

- **Growth** in grapes production is particularly significant in China, India, USA and Chile.

- **Decrease** in Italy, France, Spain and Iran.
Major grape producers by type of products*

*excluding juices & musts
Wine production
- **2016 world wine production** (excluding juice & musts) **decreased by almost 15 mhl** compared with 2015 production.

- Production it’s among one of the lowest production over the last 20 years.
Wine production in 2016

- France: 41.9 mhl
- Spain: 37.8 mhl
- Germany: 8.4 mhl
- Italy: 48.8 mhl
- China, 11.5 mhl
- Australia: 12.5 mhl
- USA: 22.5 mhl
- Chile: 10.1 mhl
- Argentina: 8.8 mhl

Wine production mhl (excluding juice & musts)
- lower than 1
- from 1 to 6
- from 7 to 9
- from 10 to 25
- from 25 to 50
In Europe

2016 & trends in productions

Annual trends in wine production:

- **2016 production slightly higher** than the average for **Italy, Spain** and **Romania**

- **production lower** than the average in **France, Germany** and **Portugal**

* five-year average excluding minimum and maximum productions during the period
Annual trends in wine production:

- Production **above the average** of the previous years in the USA, Australia, New Zealand

- **Lower production** than the average in Argentina, South Africa and Brazil

* five-year average excluding minimum and maximum productions during the period
## Wine production excluding juice and musts

### Table 1: Wine production (excluding juice and musts) (1)

<table>
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<tr>
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<td>2.7</td>
<td>2.8</td>
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<td>-50%</td>
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<tr>
<td>OIV World Total (3)</td>
<td><strong>267.7</strong></td>
<td><strong>258.1</strong></td>
<td><strong>288.9</strong></td>
<td><strong>270.8</strong></td>
<td><strong>274.4</strong></td>
<td><strong>259.5</strong></td>
<td><strong>-15.0</strong></td>
<td><strong>-5%</strong></td>
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</tr>
</tbody>
</table>

(1): Countries for which information has been provided with a wine production of more than 1 mhl

(3): OIV estimate: mid-range estimate Range for evaluation of 2016 world production: from 255.0 mhl to 264.0 mhl.

* Report for the year 2015, 2016 figures not yet available
Wine Consumption
Since the beginning of the economic and financial crisis of 2008, global consumption seems to have stabilised overall at around 240 mhl.
The 2000-2015 period has been characterized by a shift in the wine consumption patterns:

- Nowadays 39% of the wine is consumed outside of European countries, compared with 31% in 2000.
New consumers also have come in to the scene as incomes have grown, eating habits have changed.

Wine consumption is decreasing in the traditional wine countries of southern Europe.
Wine consumption in the world

5 countries consume half of the wine of the world

USA 13%
France 11%
Germany 9%
Italy 9%
China 7%

During the past 10 years consumption decreased especially in the traditional wine countries

Variation since 2005
- Decrease
- Stable
- Increase

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Wine trade
In 2015 *world wine export* increased by 1.9% in volume (104 mhl) and by 10% in value (28 Billion EUR).
By type of product

Evolution of the exports by type of product in volume

million of hl

The composition of exports:

- **bottled wines** continue to decrease slightly in volume, but increase in value
- **sparkling wines** continue to increase in volume and in value
- **bulk wines** continue to increase in volume
Top world exporters

Export is widely dominated by Spain, Italy and France representing 56% of the volume of the world market.

In value, France and Italy continue to dominate the market with respectively 29% and 19%.
The top 5 importers in value represent more than 50%.
Structure of world wine market

In 2015:
- World production: 274.4 mhl
- Global consumption: 240 mhl
- Total export: 104.3 mhl (43% of global consumption)

- Progressive increase of the “international wine” (wine traded internationally) versus wine consumed domestically
- Wine is less and less consumed in its producing country
FAO-OIV Focus 2016: Table and Dried Grapes
Grapes are one of the world’s largest fruit crops. Given the importance of grape production and the fact that fermented products only represent a partial share of grape consumption, there is a real need to gain a clearer picture of trends and patterns in the international grape economy.

Approximately 44% of unpressed grapes in 2014 were used for wine, while 48% is used for wine.
- **FAO with FAOSTAT**, the world's largest database of food and agricultural information, with more than a million statistics covering five decades and 245 countries and territories

- **OIV** the reference organization on vines, wine, wine-based beverages, table grapes, raisins and other vine-based products
Content:

**Section 1** general considerations of the basics of viticulture, food use of grape crops, and its nutritional aspects.

**Section 2** provides an analyses of the table and dried grape market. It presents the latest data on production, consumption and imports.
Table Grapes

27 million of tons: world production in 2014

- China is a major contributor to the growth of world production. Between 2000 and 2014, table grape production in China has multiplied by 7

3 countries produce 50%
Table grapes production in 2014

- **China**: 9.2 mt (34%)
- **USA**: 1.2 mt (4%)
- **Egypt**: 1.4 mt (5%)
- **Italy**: 1.0 mt (4%)
- **Iran**: 1.1 mt (4%)
- **Brazil**: 0.7 mt (3%)
- **Turkey**: 2 mt (8%)
- **Uzbekistan**: 1 mt (4%)
- **India**: 2.1 mt (8%)
### Table Grapes

**26.2 million tons:** world consumption in 2014

- China is the largest consumer (9 million tons) followed by India and the Turkey (with both a consumption of 1.8 million)

- Grape consumption is not only on the rise in these markets; there is clearly growing interest in this fruit in Southeast Asian markets.

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**Chart:**

- Line graph showing an increase of +73% since 2000.
- Pie chart indicating that 6 countries consume 63% of the world's table grapes.
  - China: 36%
  - USA: 4%
  - India: 7%
  - Egypt: 5%
  - Turkey: 7%
  - Rest of the world: 37%
Table Grapes

4.2 million tons: the world export in 2014

- Table grape export has grown significantly
- Growth was particularly driven by the emergence of new players in table grape trade, such as South Africa and Peru
Dried Grapes

1.5 million tons: world production in 2014

- Turkey and USA dominate global dried grapes production

- +10% since 2000

- 5 countries produce 80%

- Turkey: 28%
- USA: 21%
- Iran: 13%
- China: 12%
- Rest of the world: 21%

- 1.5 million tons: world production in 2014

- Million of tons
Dried grapes production in 2014

- USA: 320 kt
- Mexico: 13 kt
- Chile: 93 kt
- Argentina: 18 kt
- Greece: 56 kt
- Turkey: 429 kt
- Uzbekistan: 50 kt
- Iran: 200 kt
- India: 62 kt
- China: 180 kt
- South Africa: 46 kt
- Australia: 7 kt
Dried Grapes

1.6 million tons: world consumption in 2014

- USA and Turkey are the largest national markets
- followed by China which doubled its consumption since 2000.
Dried Grapes

816 thousand tons world export in 2014

- Turkey is the world’s leading exporter
- the EU is the leading importer market
- India and China are major producers, but not yet major exporters

+33% since 2000
Future actions:

How to improve the data collection of this segment of the sector?

The statistical data currently available on the quantities of grape juice produced and on intermediate unfermented products do not enable us to analyse these segments of the sector in further details.
Thank you for your attention

Vielen Dank für Ihre Aufmerksamkeit

Grazie per la Loro attenzione

Gracias por su atención

Merci de votre attention

Obrigado