



INTERNATIONAL ORGANISATION OF VINE AND WINE

STATE OF THE GLOBAL WINE SECTOR

OIV – Private Sector Strategic Dialogue
Paris (France)

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Digital Transformation Department (OIV)



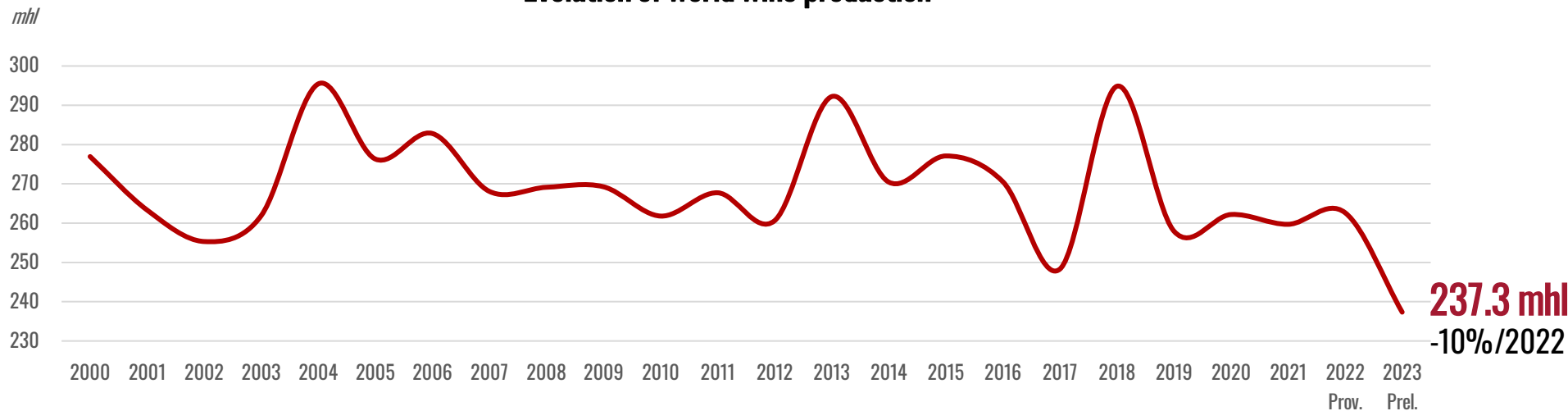
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International Year of Vine and Wine 1924 • 2024



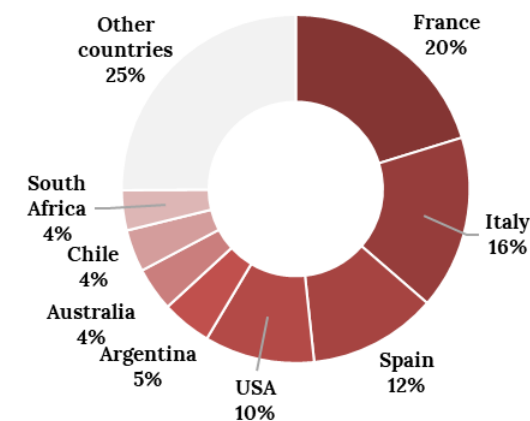
Wine Production

Evolution of world wine production



In 2023, 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**.

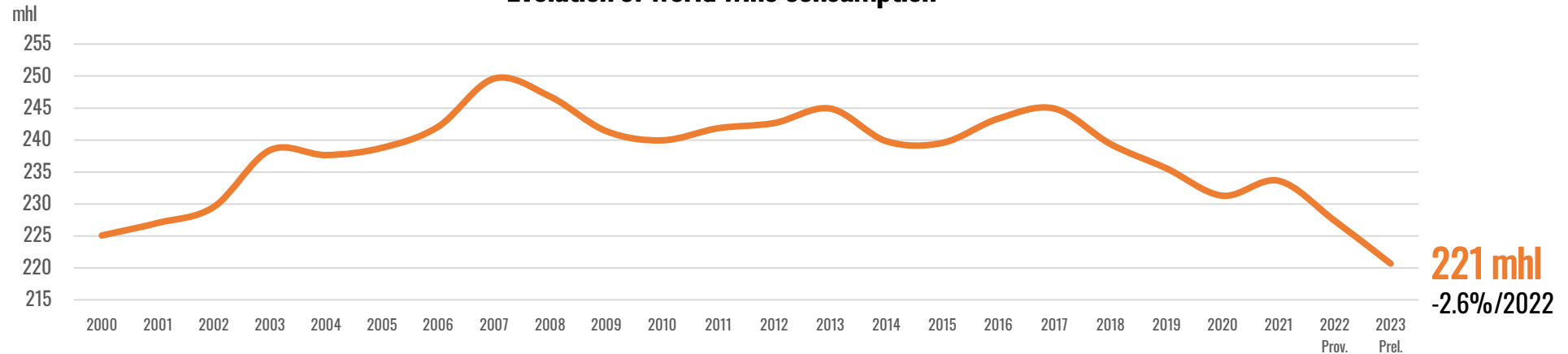
Very low production volumes were recorded in both the EU (145 mhl, -11%/2022) and the Southern Hemisphere (47 mhl, -15%/2022).





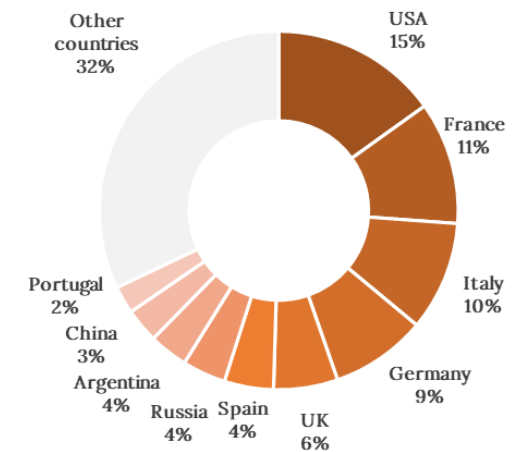
Wine Consumption

Evolution of world wine consumption



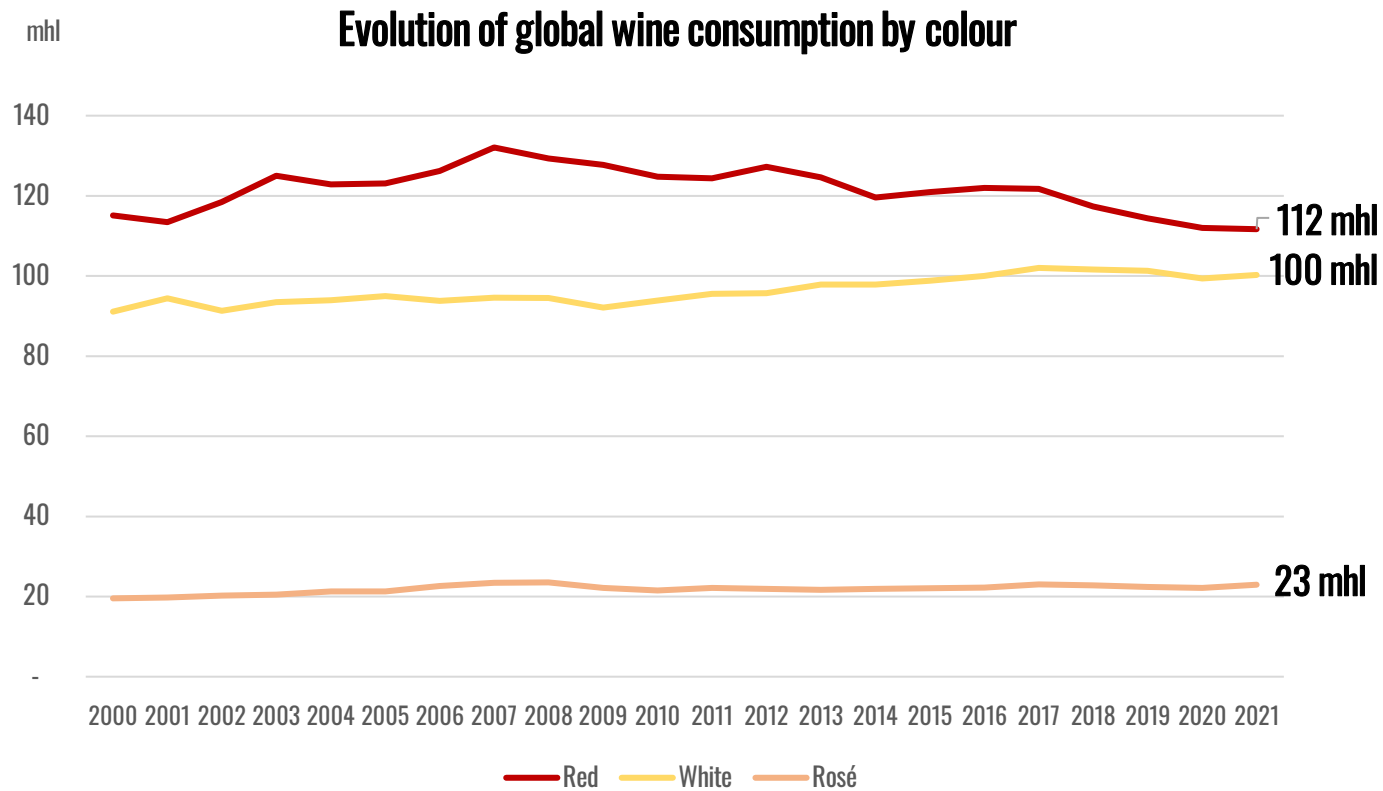
Global wine consumption in 2023 is estimated at **221 million hectolitres**, indicating a decrease of **2.6% compared to 2022's already low figures**. The spike in production and distribution costs, driven by **inflationary pressures**, led to higher wine prices for consumers, who were already dealing 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%.

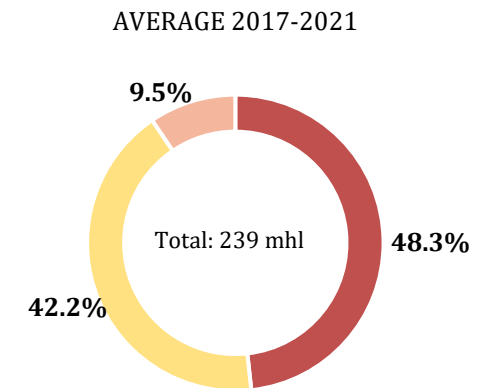
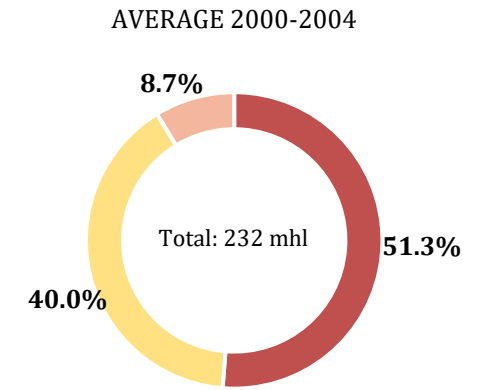




Wine Consumption



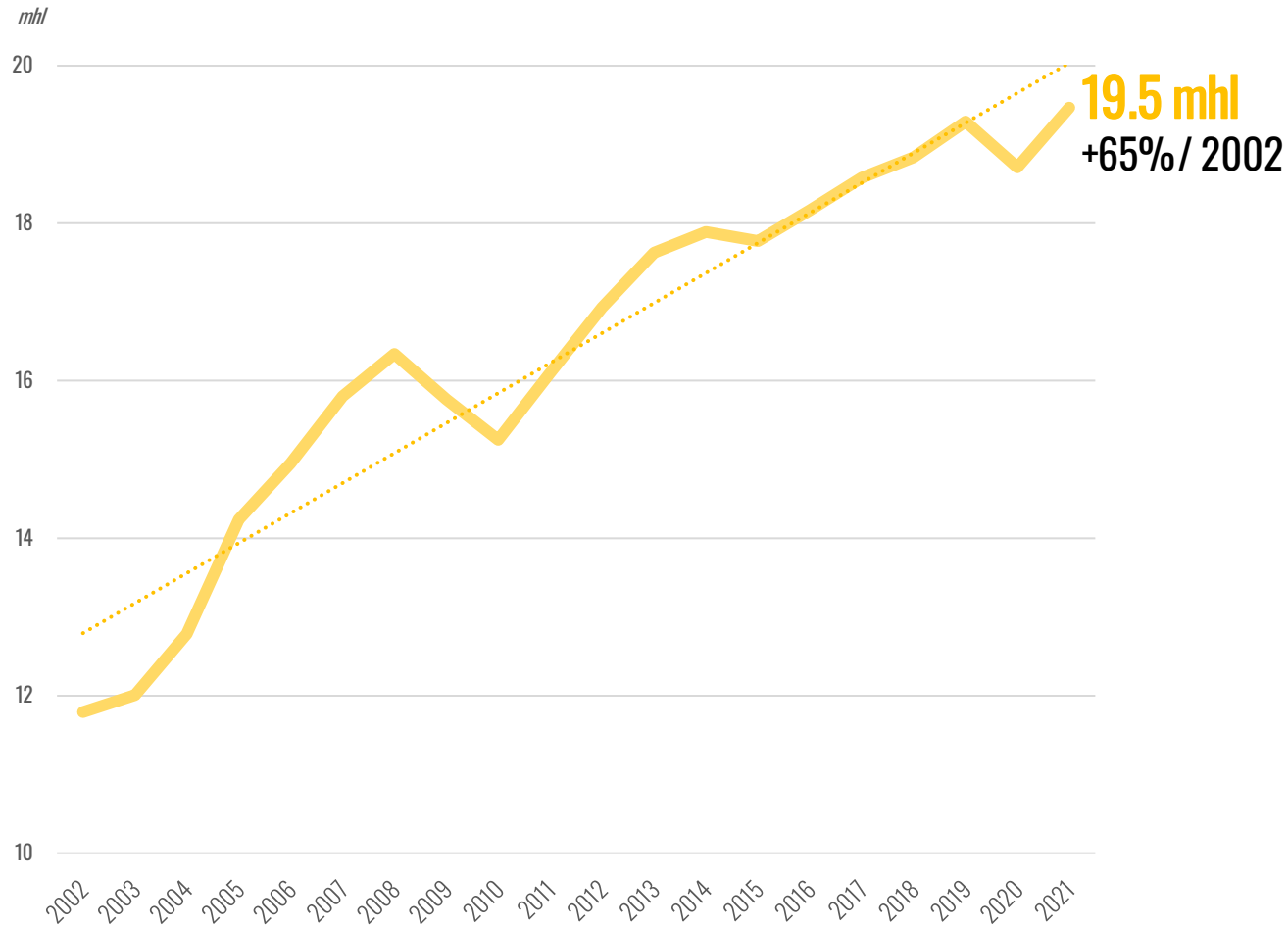
In 2021, world red wine consumption reached 112 mhl (47%), followed by white wine at 100 mhl (43%) and rosé wine at 23 mhl (10%). Unlike production, white wine consumption has not overtaken red wine. This is because most of the wine destined for industrial uses (distillation, production of vinegar, wine-based beverages, etc.) is white





Wine Consumption

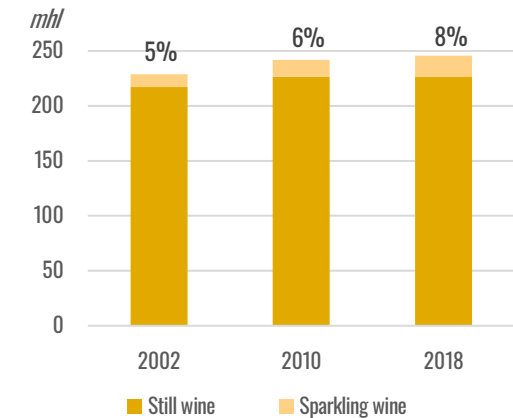
Evolution of world consumption of sparkling wine



In 2021 global sparkling wine consumption reached 19.5 mhl, +65% since 2002.

In terms of the relative weight of sparkling wines in overall wine consumption, while in 2002 it was at 5%, in 2018 sparkling wines represent about 8% of total wine consumption.

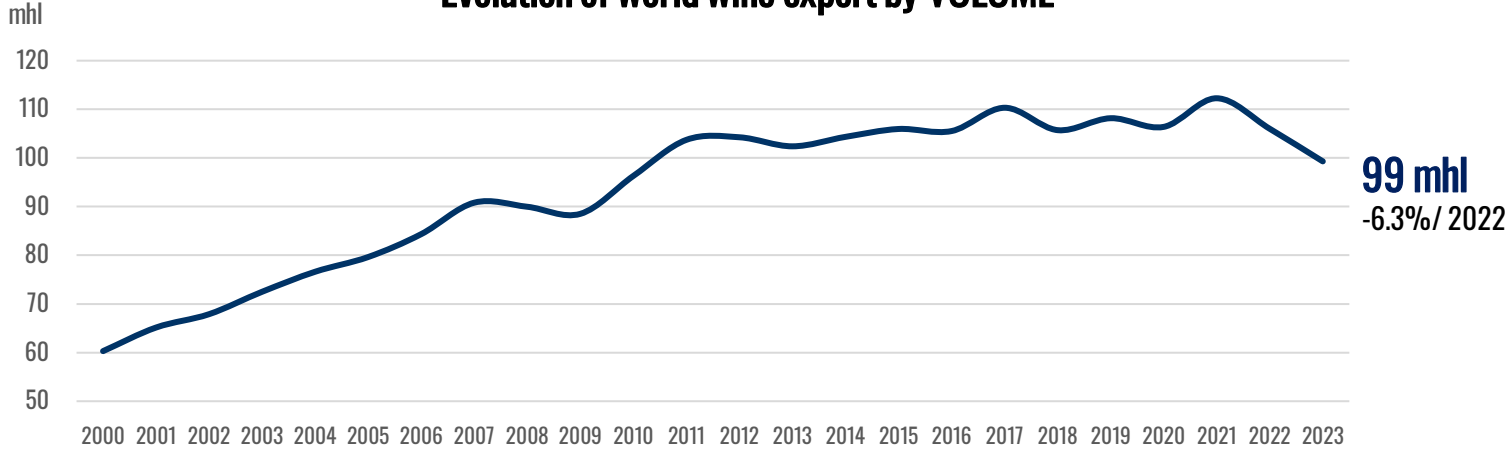
Share of sparkling wine in world wine consumption





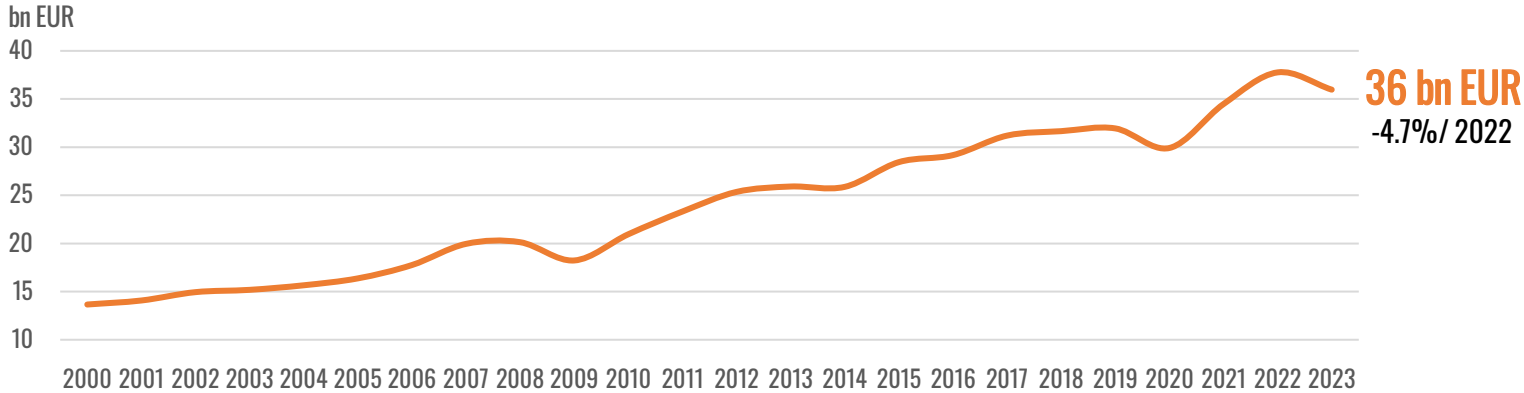
International Trade in Wine

Evolution of world wine export by VOLUME



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

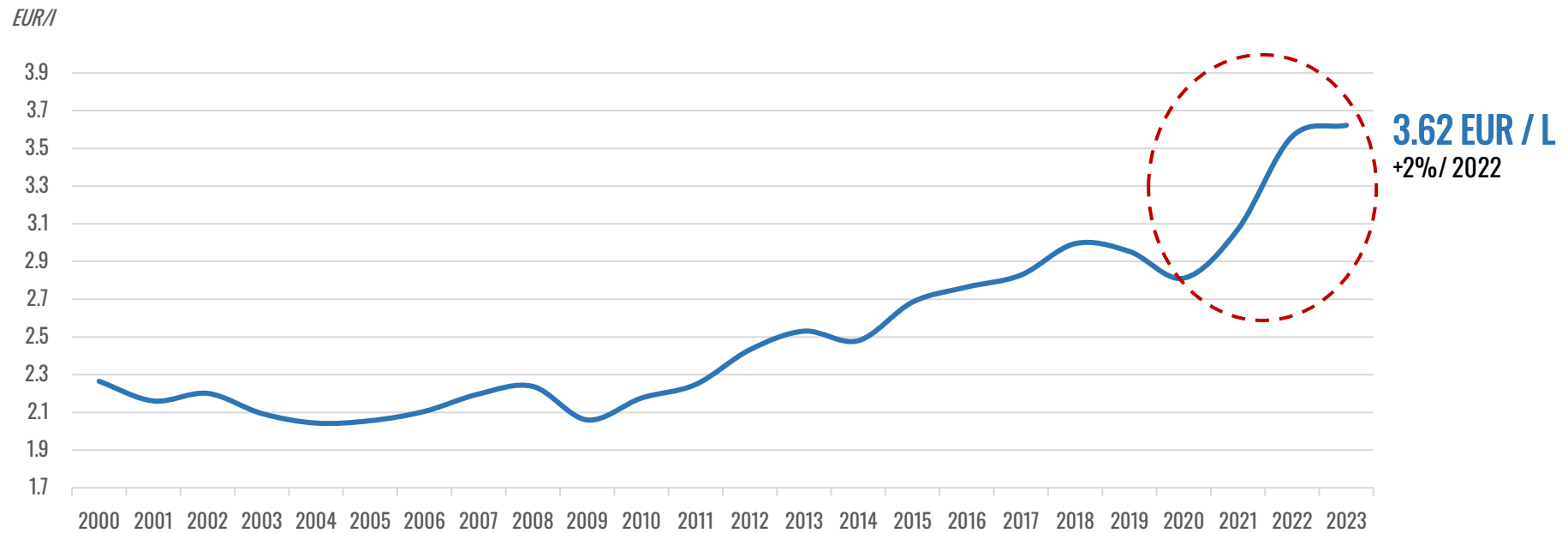


Despite a **4.7% decrease** compared to the record high of 2022, the global wine export value in 2023 reached **36.0 billion EUR**, the **second highest ever recorded**.



International Trade in Wine

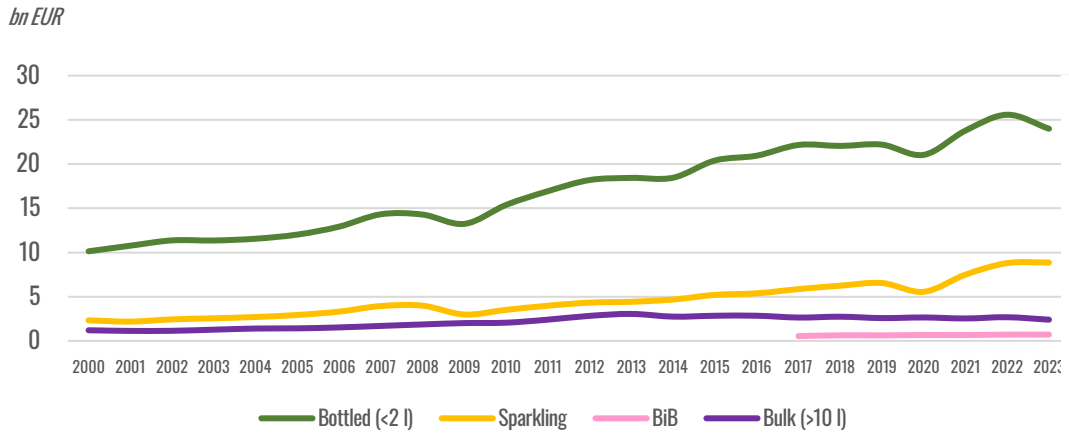
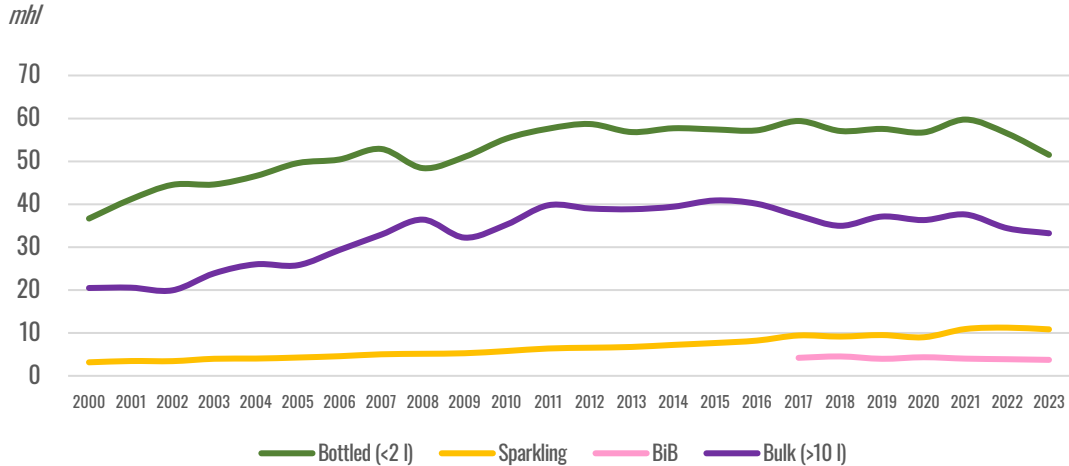
Evolution of world average export price



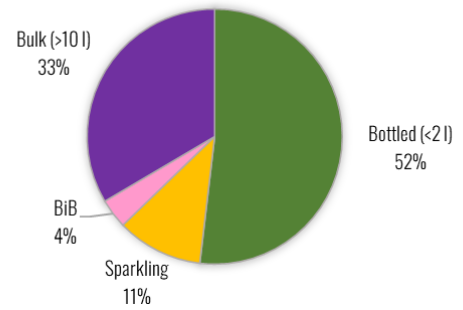
The average world export price of wine in 2023 peaked at 3.62 EUR/L, the **highest ever recorded**. This represents a **significant increase of 29% since 2020**. This rise in prices primarily stems from higher costs incurred by producers, importers, and distributors, a **direct consequence of global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



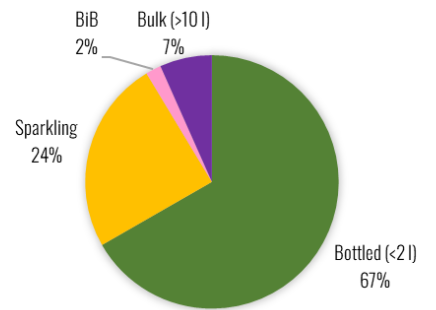
International Trade in Wine



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

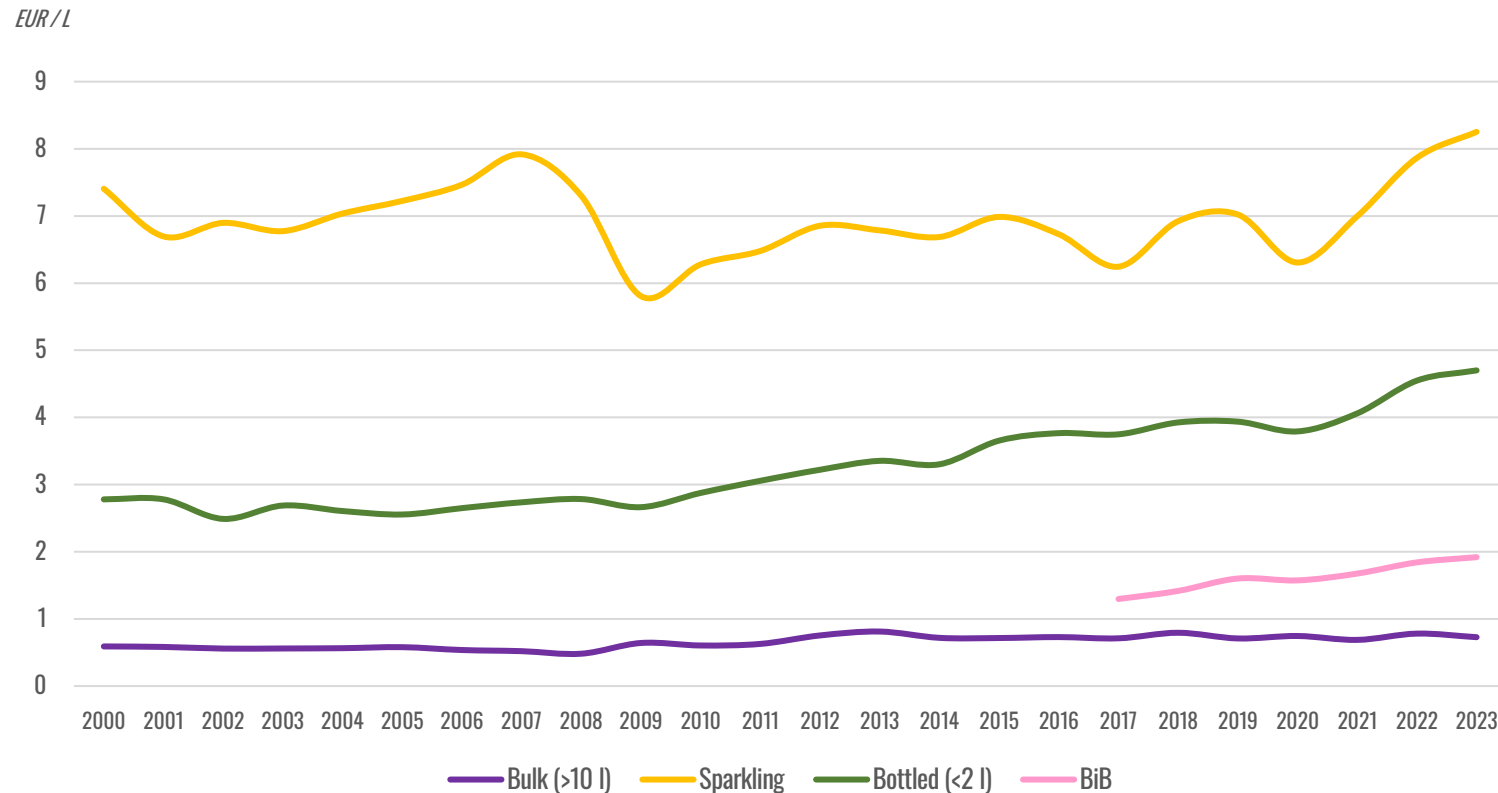
Bag-in-Box (BiB)
 Volume: -4% / 2022
 Value: +0% / 2022

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

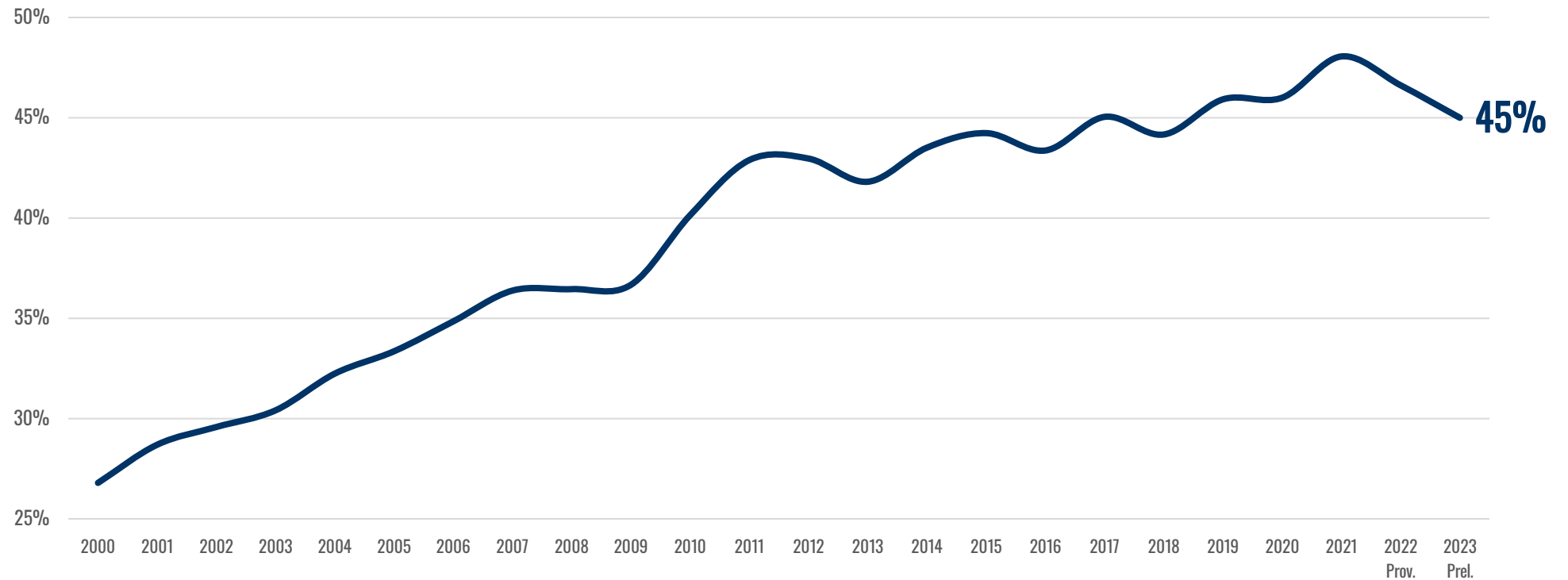
Bulk

-7%/2022

-2%/2020



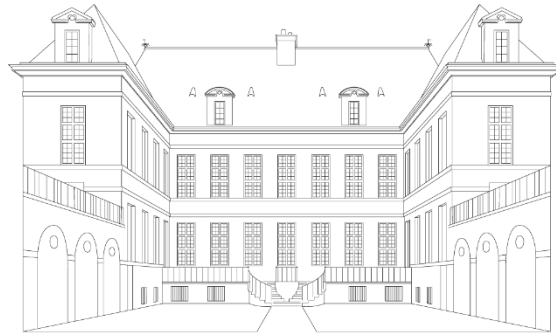
Market Internationalisation Index



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

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THANK YOU FOR YOUR ATTENTION
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