



INTERNATIONAL ORGANISATION
OF VINE AND WINE

STATE OF THE GLOBAL VINE AND WINE SECTOR

OIV Press Conference

John Barker, OIV Director General
15 April 2025

OIV



2024 DATA

Vineyard Surface Area

Wine Production

Wine Consumption

International Trade in Wine

2025 First Estimates

Wine Production in Southern Hemisphere

Main Challenges for
the Global Wine Sector:
Looking Ahead



Vineyard Surface Area



Grape for all uses



9% drop since 2000



EU = 46%
SH = 12%

Vineyard Surface Area

Vineyards destined for the production of all types of grapes, including both bearing and non-bearing areas

Evolution of world vineyard surface area

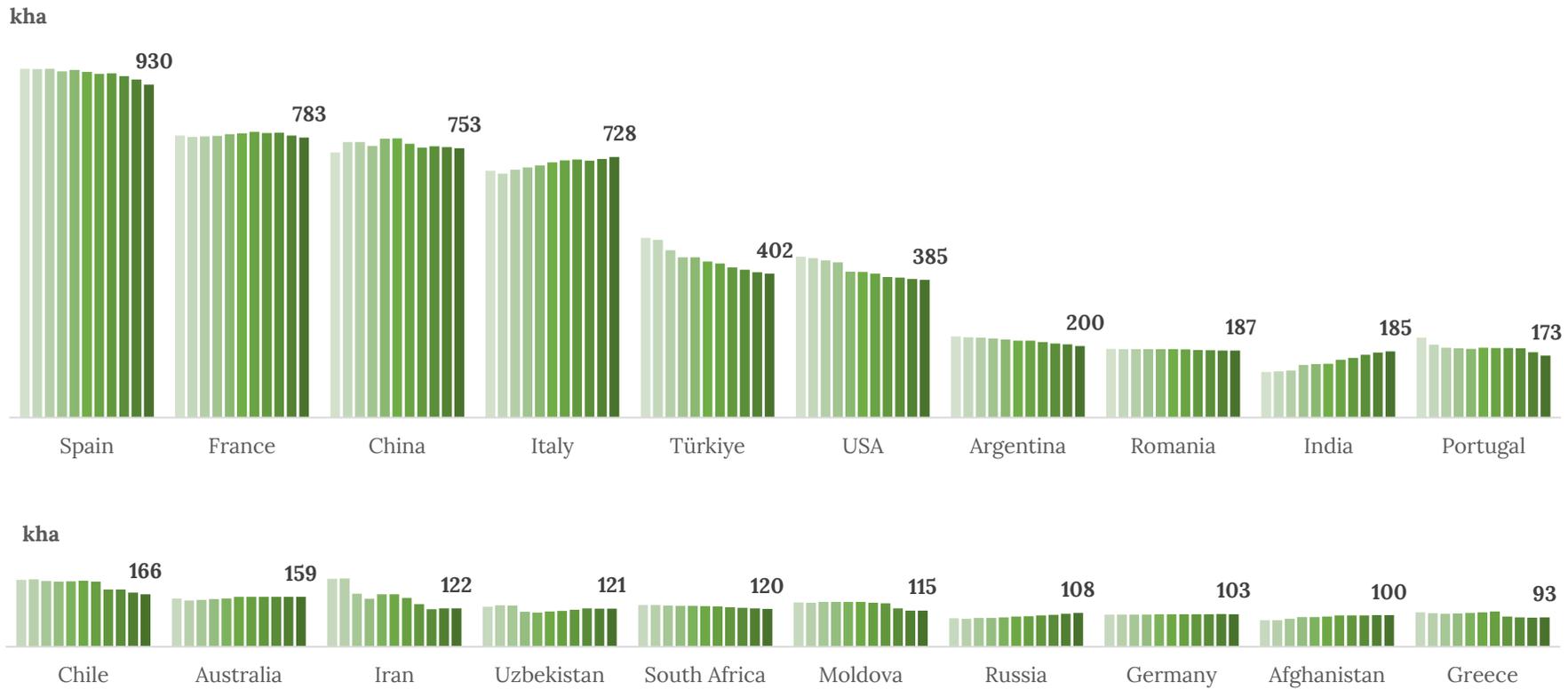




Vineyard Surface Area

Vineyards destined for the production of all types of grapes, including both bearing and non-bearing areas

Major countries by vineyard surface area, 2015-2024





Wine Production



Lowest since 1961



Atypical meteorological events

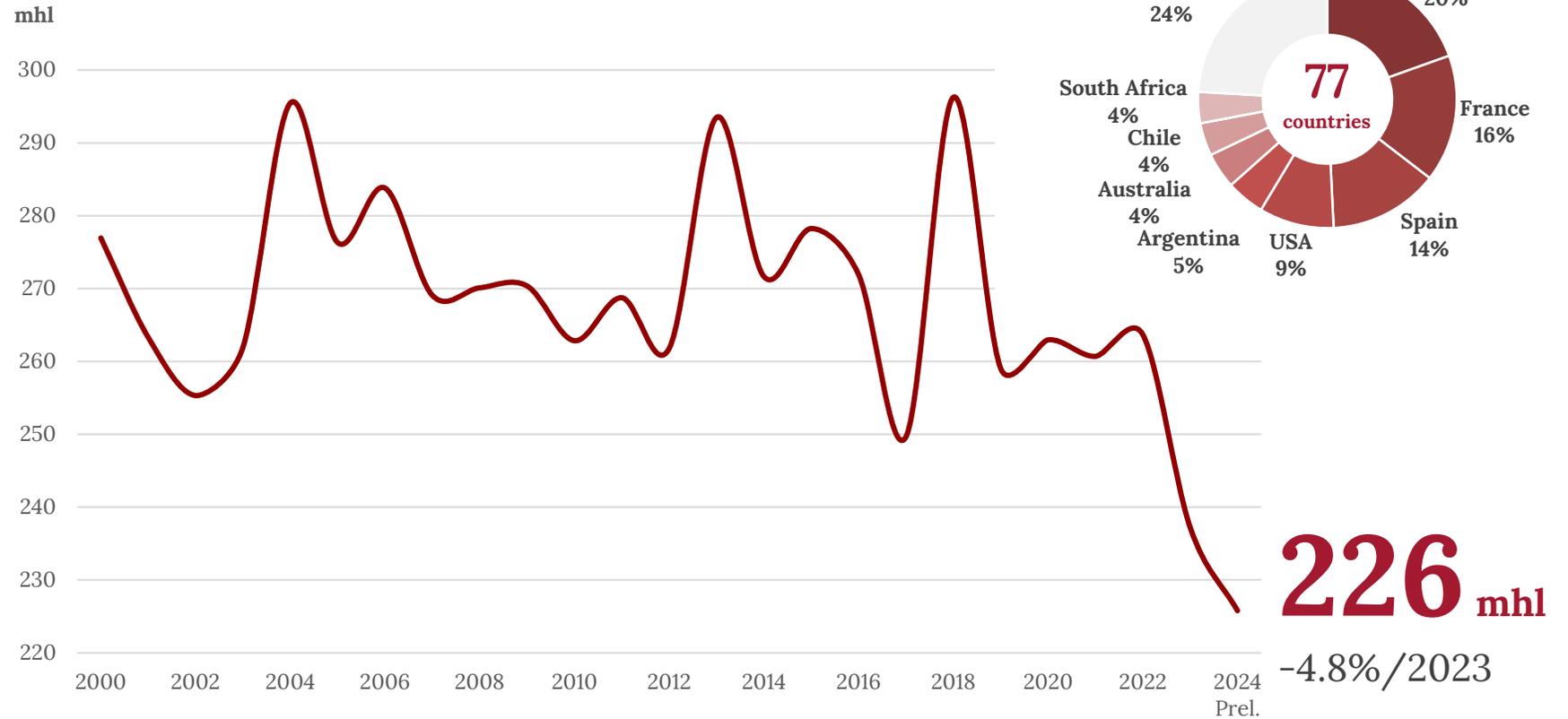


EU = 61%
SH = 20%

Wine Production

Wine production refers to the production of wine excluding musts and juices

Evolution of world wine production





Continuous Fluctuation



Tech Development

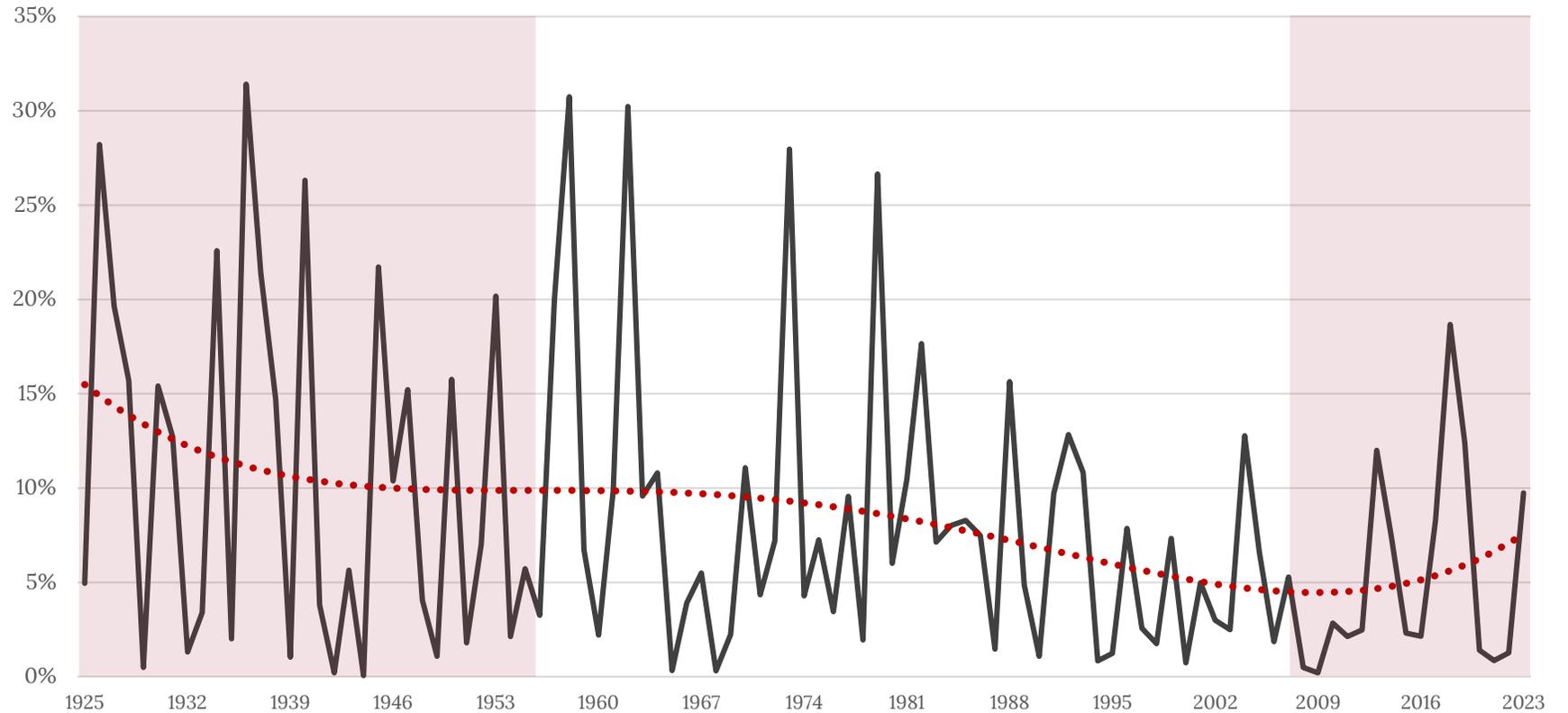


Climate change

Wine Production

Wine production refers to the production of wine excluding musts and juices

Volatility Indicator (y-o-y variation)

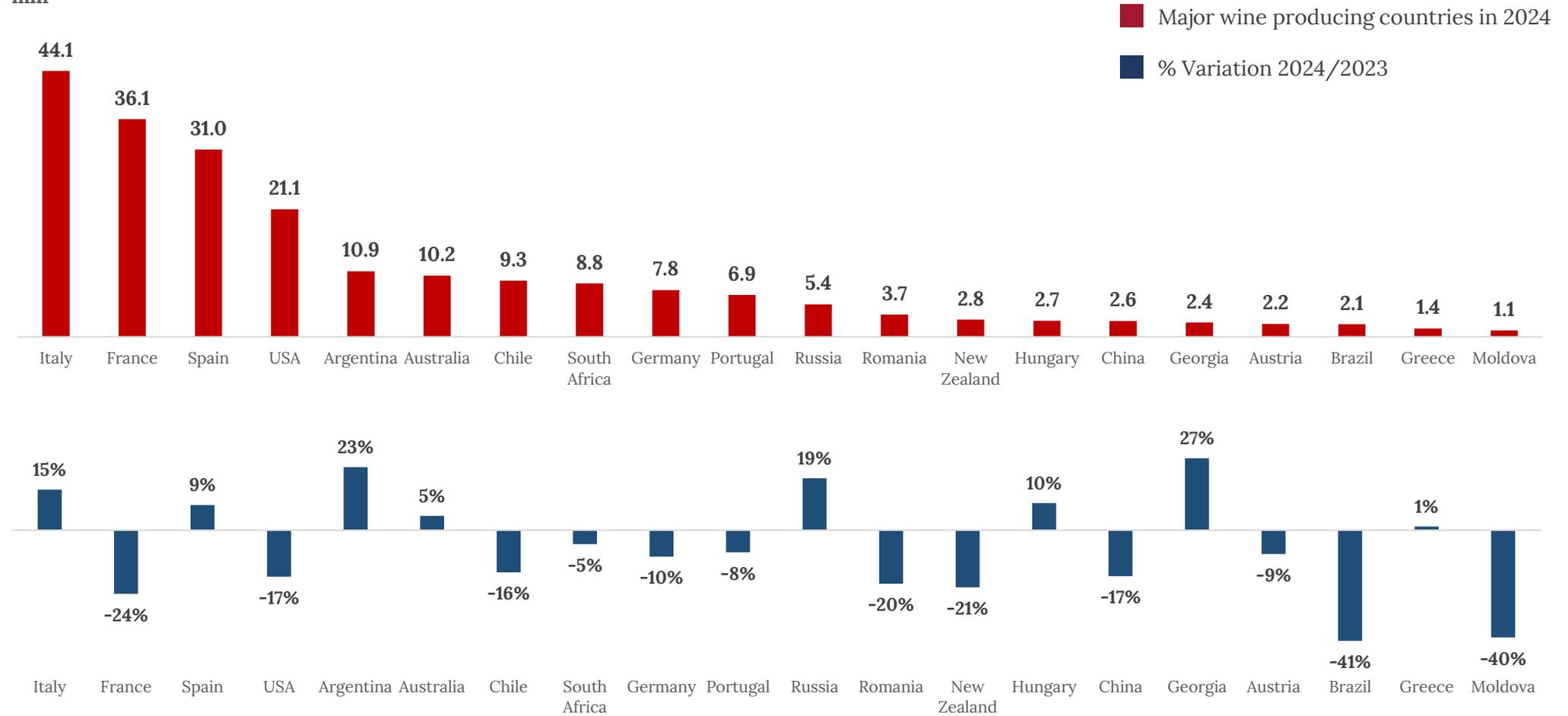




Wine Production

Wine production refers to the production of wine excluding musts and juices

mhl

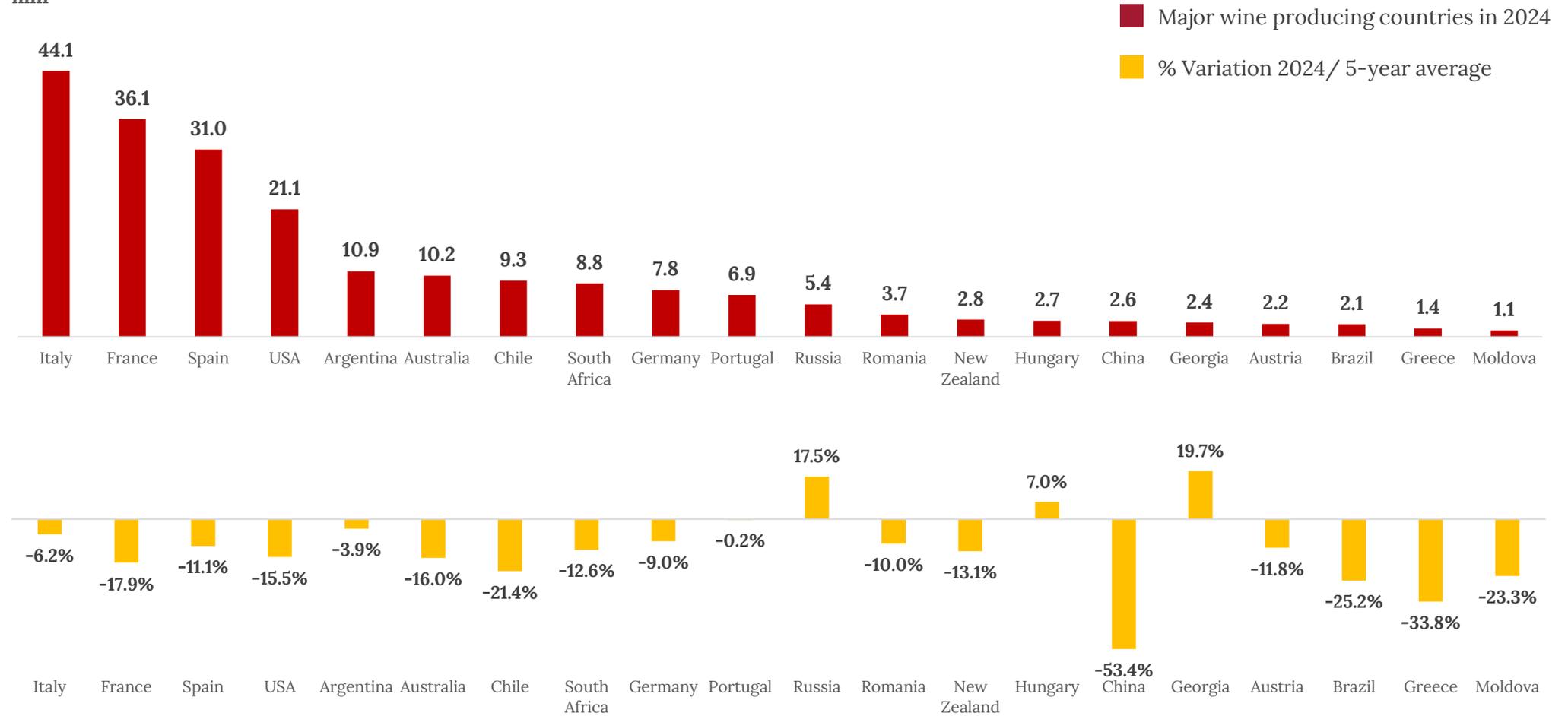




Wine Production

Wine production refers to the production of wine excluding musts and juices

mhl





Wine Consumption



Lowest since 1961



Inflationary pressures

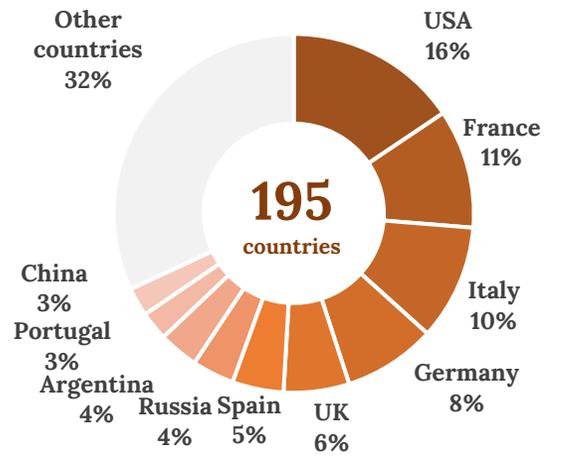
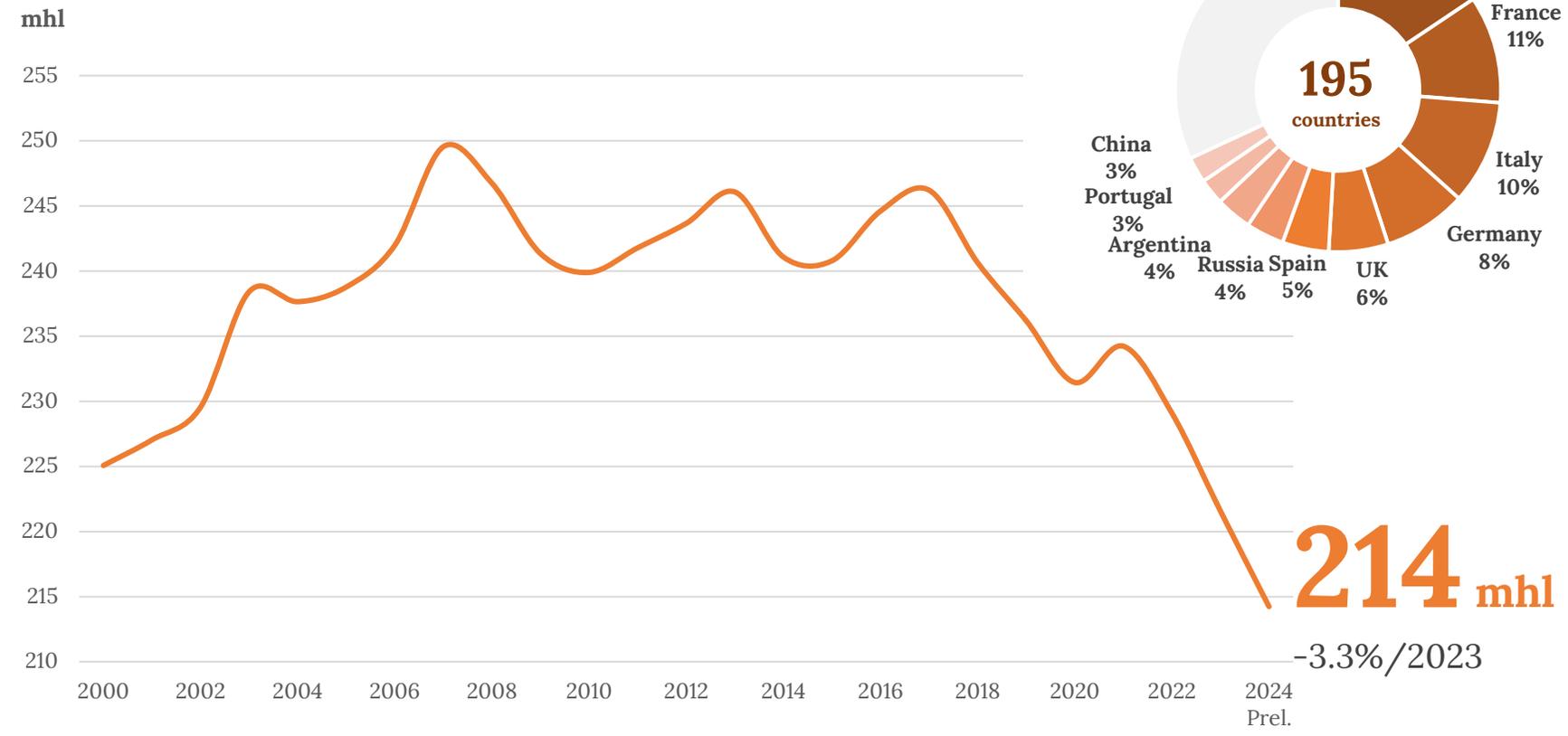


EU = 48%

Wine Consumption

Wine consumption refers to the consumption of wine, including still, sparkling, and special wines

Evolution of world wine consumption





Industrial uses



Market rebalancing

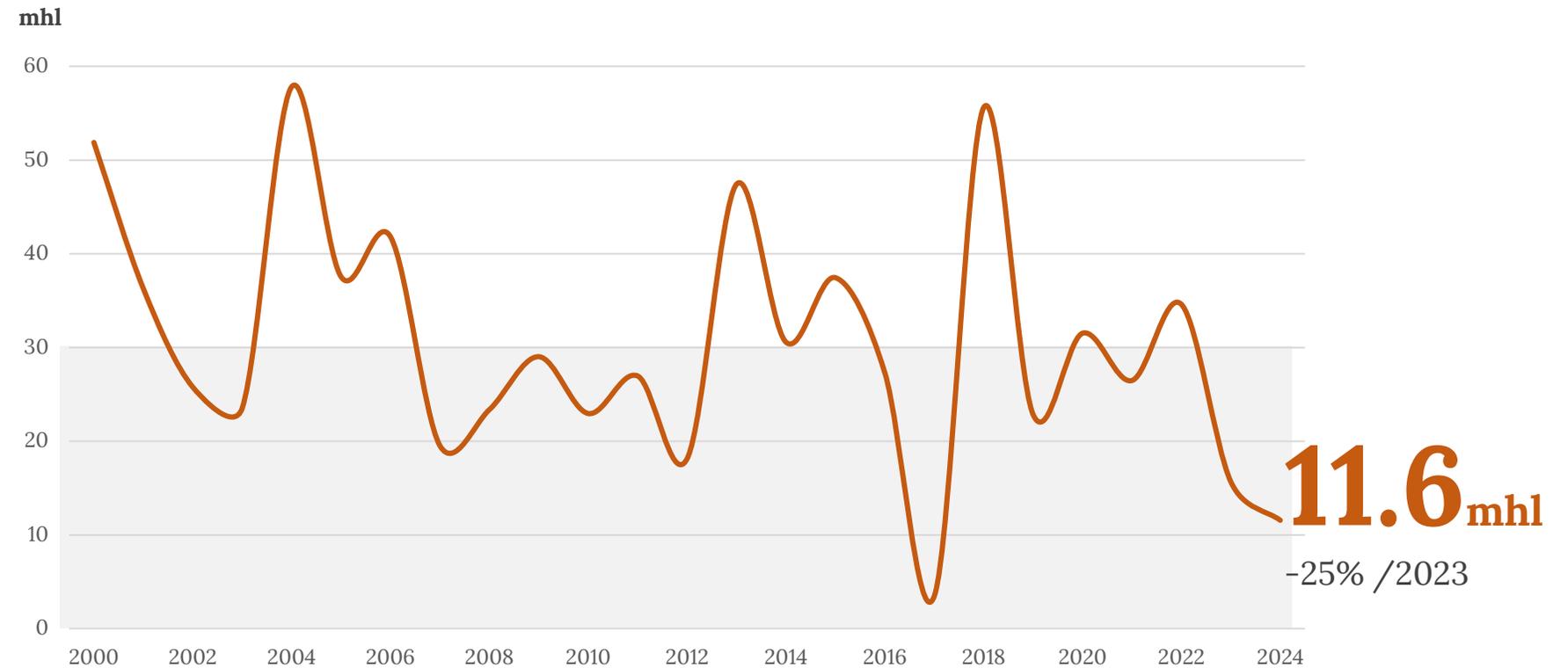


Large fluctuations

Wine Consumption

Wine consumption refers to the consumption of wine, including still, sparkling, and special wines

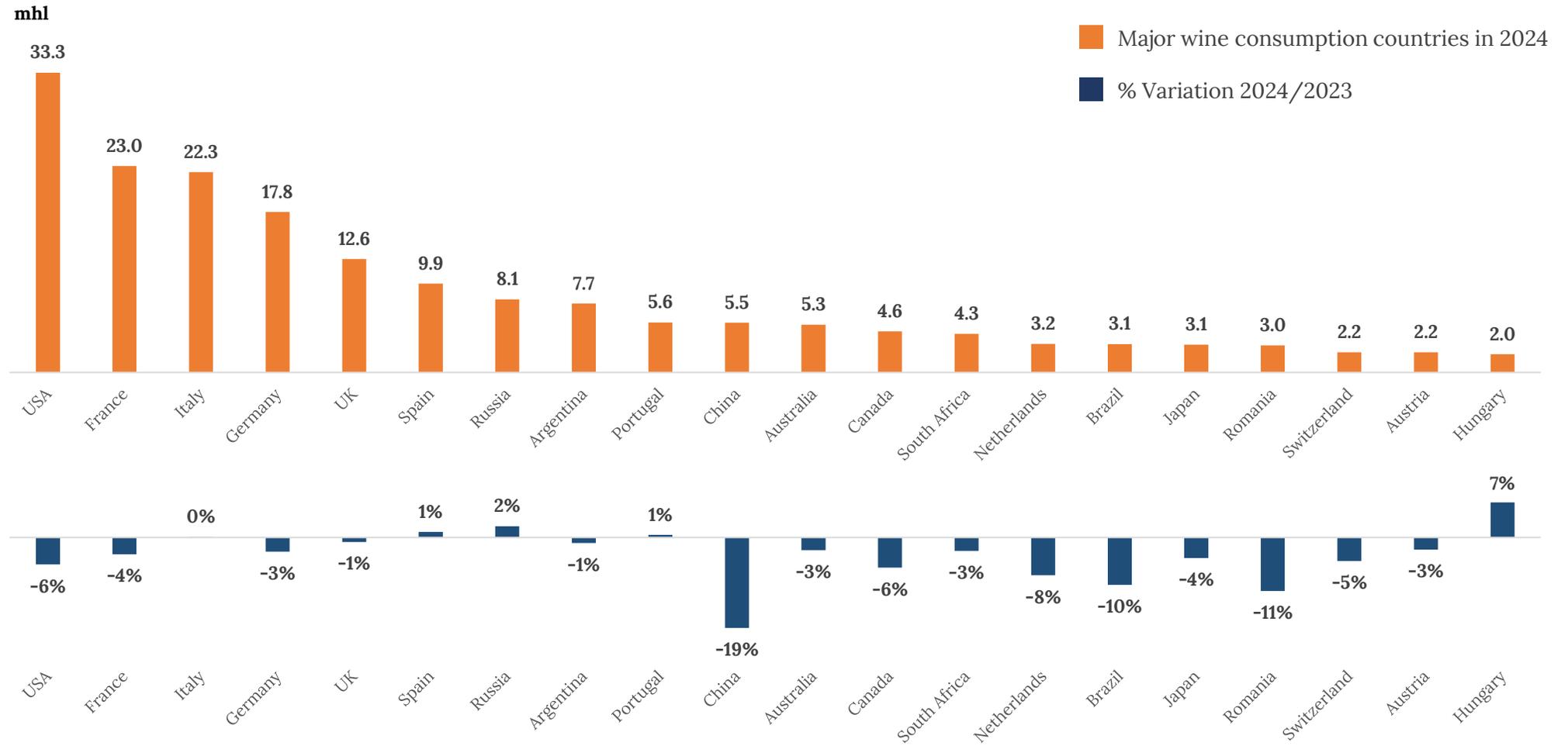
Evolution of world wine production-consumption gap





Wine Consumption

Wine consumption refers to the consumption of wine, including still, sparkling, and special wines



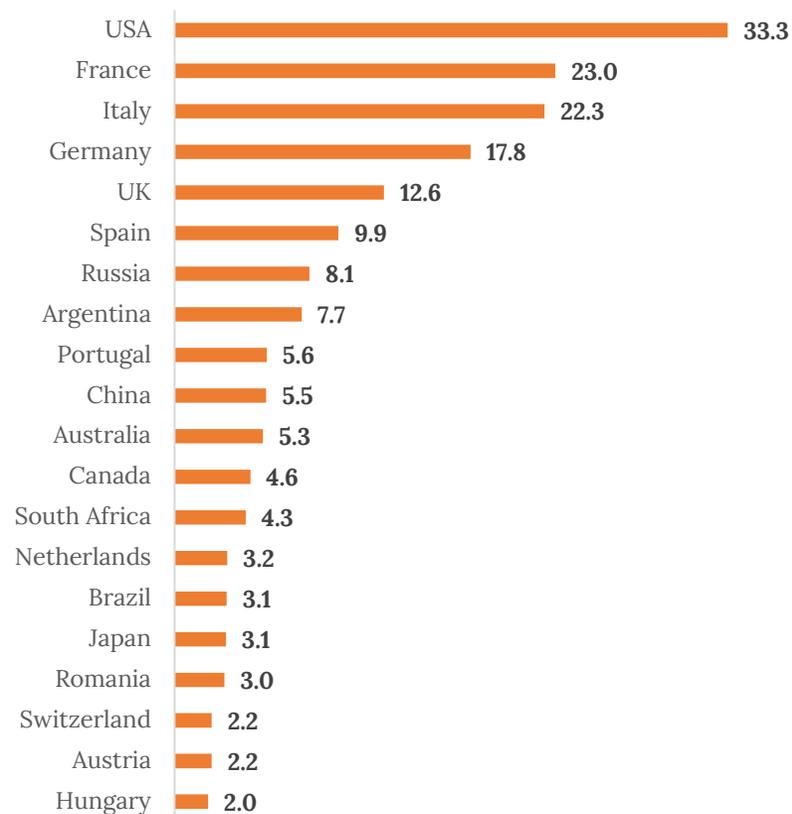


Wine Consumption

Wine consumption refers to the consumption of wine, including still, sparkling, and special wines

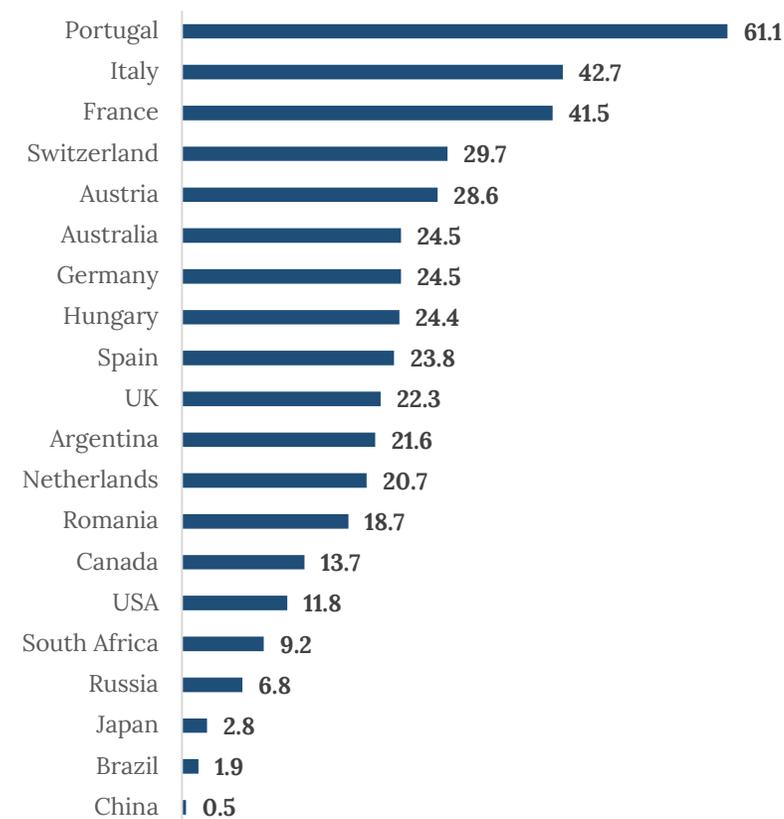
Major countries* by total consumption in 2024

mhl



Consumption per capita 15+ in major consuming countries* in 2024

l/ capita



*Countries with 2024 wine consumption above 2 mhl



International Trade in Wine



Value:
3rd highest recorded



Premiumisation



Geopolitical uncertainty

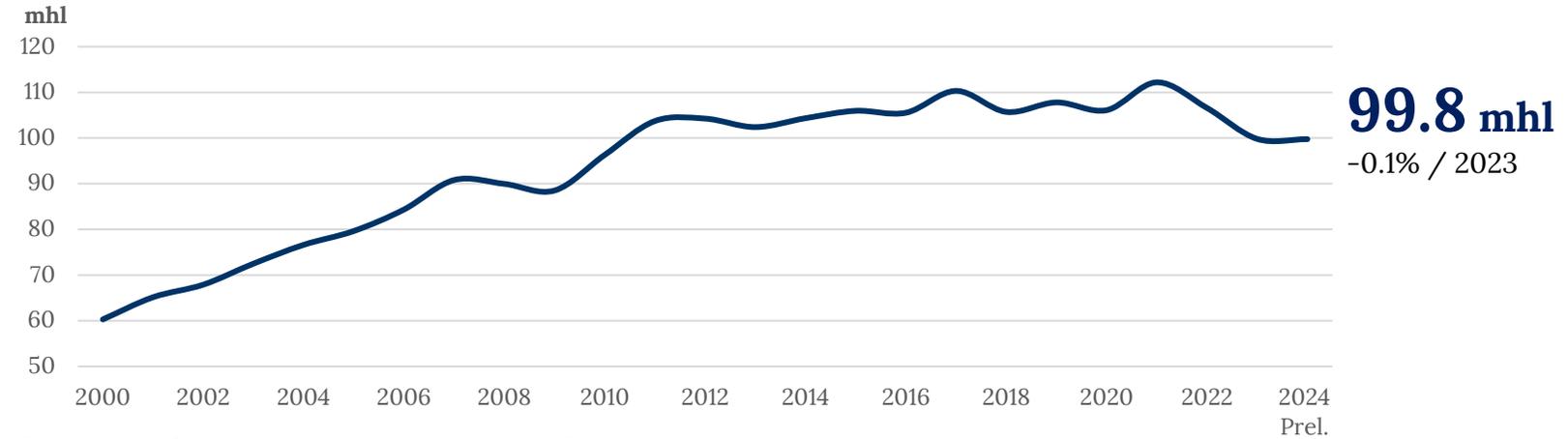


Low production

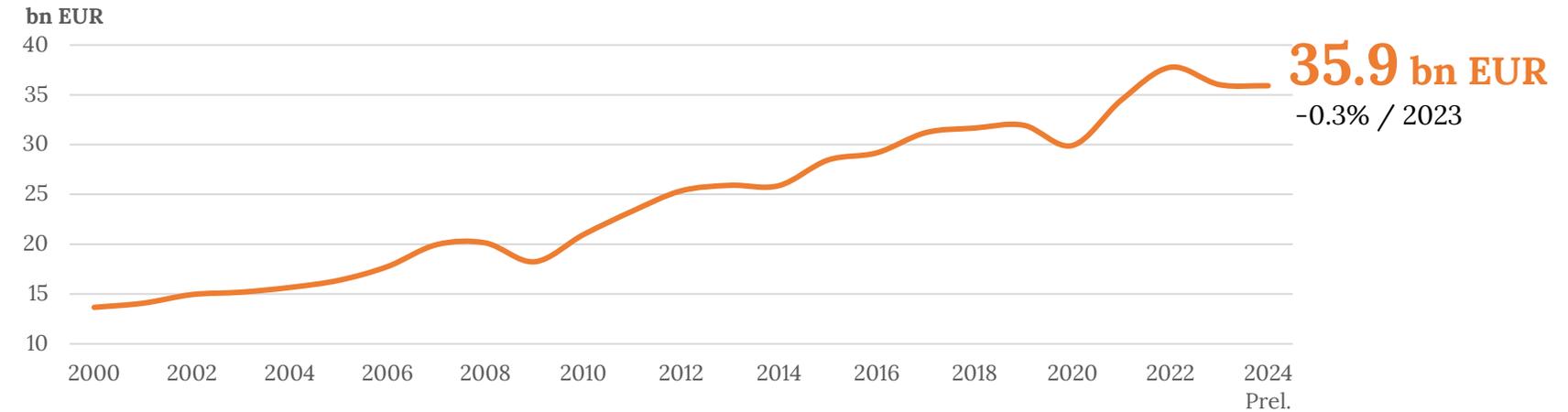
International Trade in Wine

International trade of wine refers to import/export of wine(HS code 2204)

Evolution of world wine export by VOLUME



Evolution of world wine export by VALUE





2nd highest recorded



Inflationary pressures

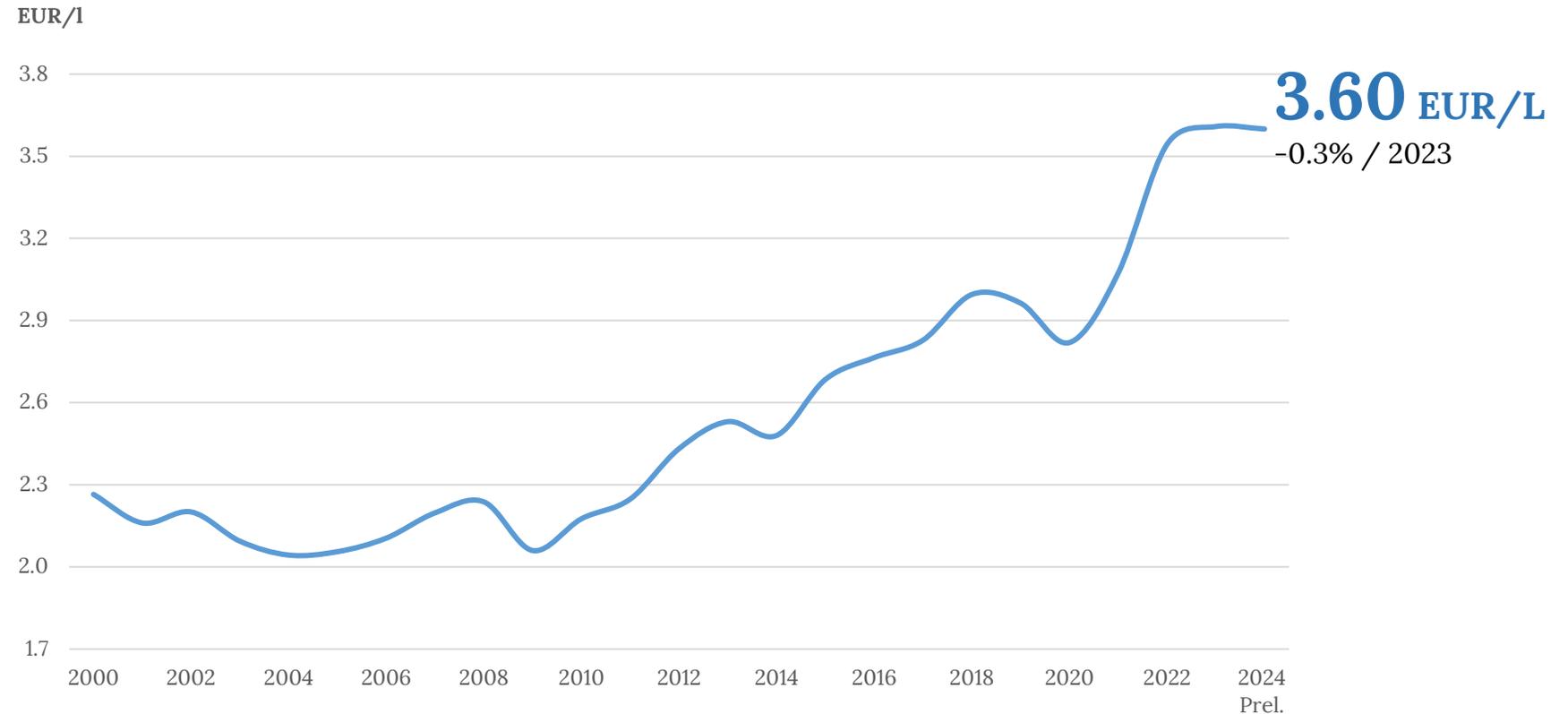


+30% / 2020

International Trade in Wine

International trade of wine refers to import/export of wine(HS code 2204)

Evolution of world average export price





Bottled



51 mhl -1.8%
24 bn EUR -0.1%

Sparkling



11 mhl -0.3%
9 bn EUR -3.7%

Bag-in-Box

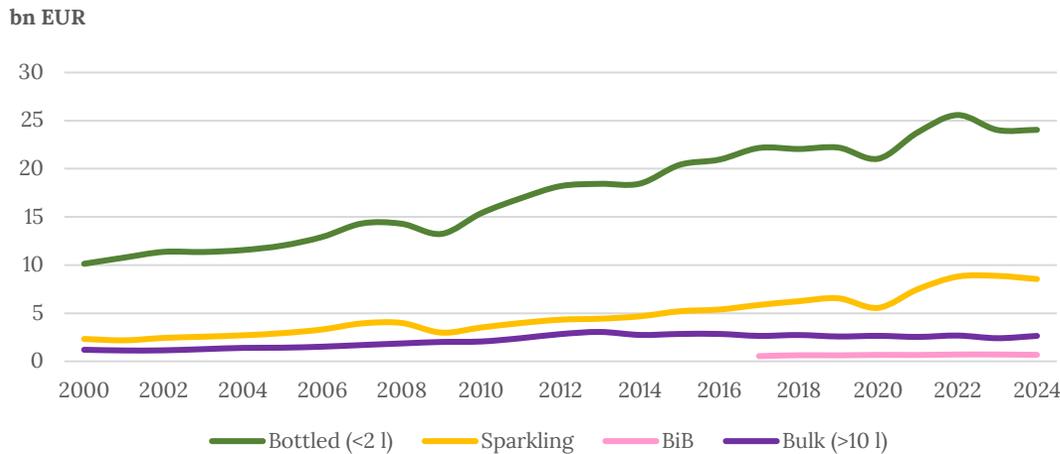
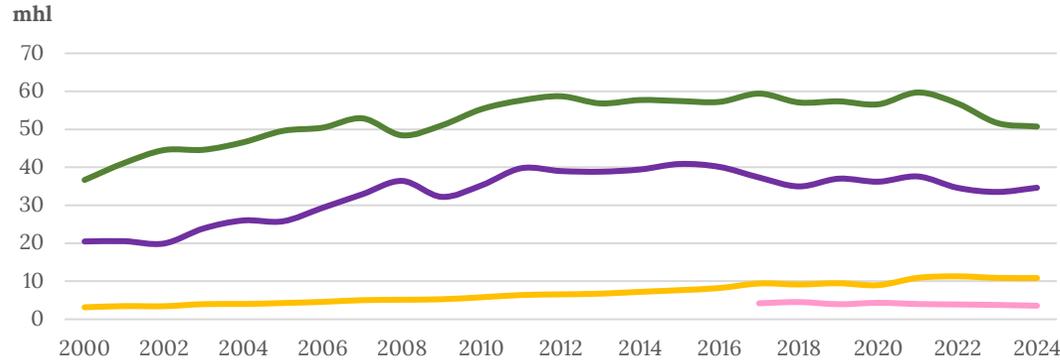


4 mhl -5.0%
1 bn EUR -4.8%

Bulk

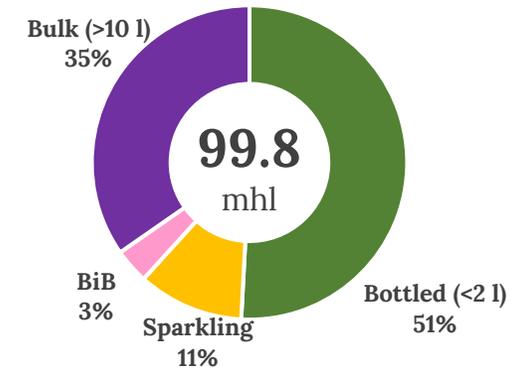


35 mhl +3.3%
3 bn EUR +9.8%

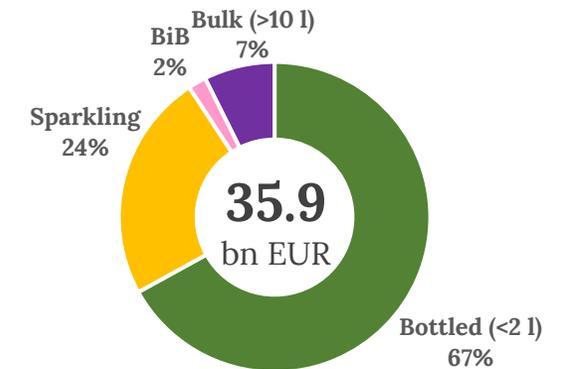


International Trade in Wine

Breakdown of global trade VOLUME in 2024



Breakdown of global trade VALUE in 2024





International Trade in Wine

Sparkling



7.9 € / l -3.4%

Bottled



4.7 € / l +1.9%

Bag-in-Box



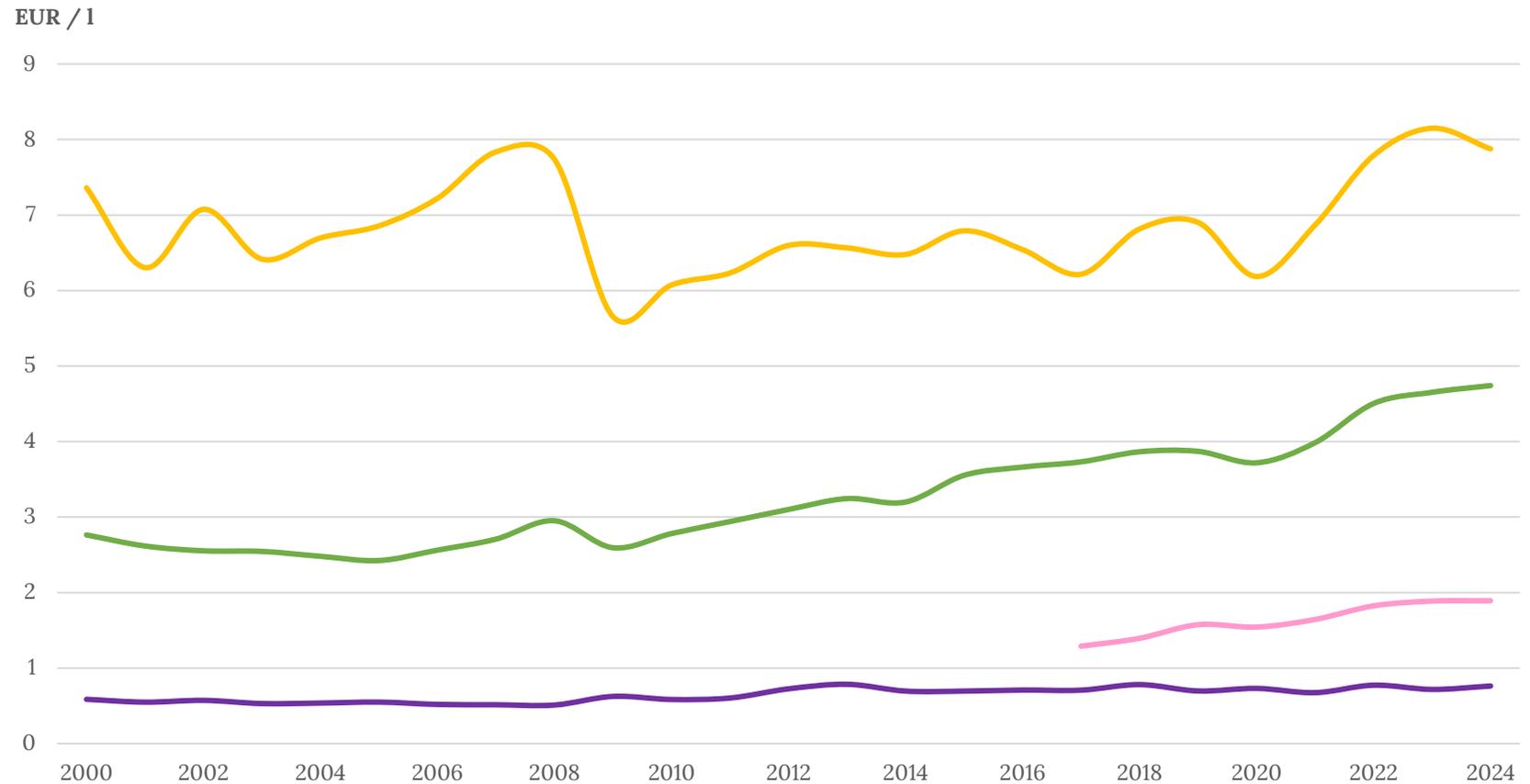
1.9 € / l +0.2%

Bulk



0.8 € / l +6.3%

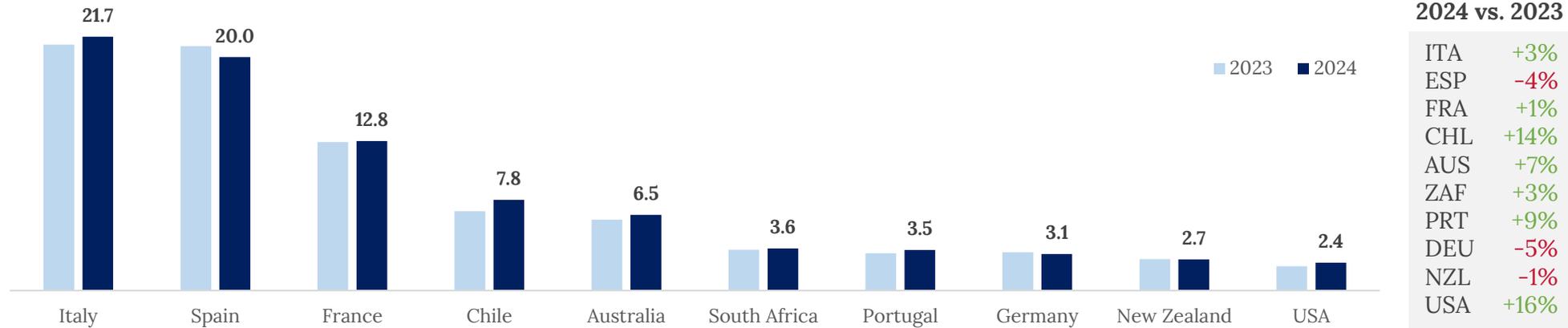
Evolution of world average export price by category





Main Wine Exporters

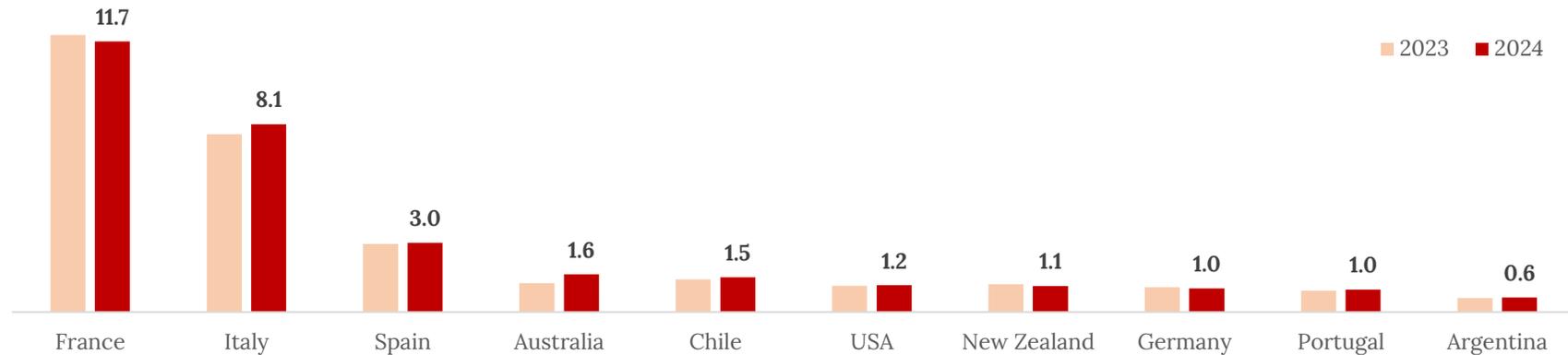
Top 10 exporters by VOLUME (mhl)



Top 10 exporters by VALUE (bn EUR)

2024 vs. 2023

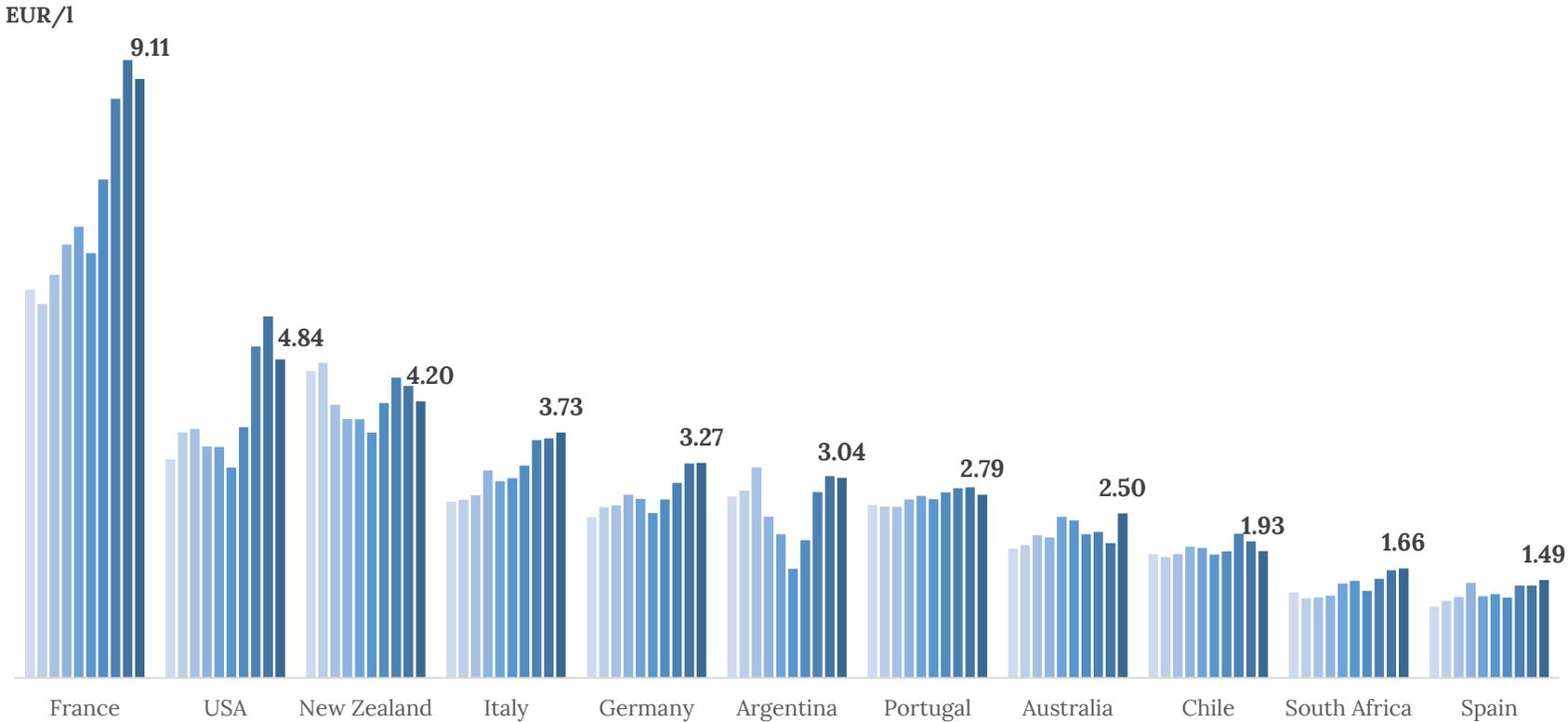
FRA	-2%
ITA	+6%
ESP	+1%
AUS	+31%
CHL	+6%
USA	+2%
NZL	-6%
DEU	-4%
PRT	+4%
ARG	+4%





Main Wine Exporters

Major Exporters by Average Export Price, 2015-2024



2024 vs. 2023

FRA	-3%
USA	-12%
NZL	-5%
ITA	+2%
DEU	+0.3%
ARG	-1%
PRT	-4%
AUS	+22%
CHL	-7%
ZAF	+2%
ESP	+6%

*Countries listed as top 10 exporters, by volume or value in 2024



Export Intensity Index

% Exports / Prod (avg. 2020-2024)

1

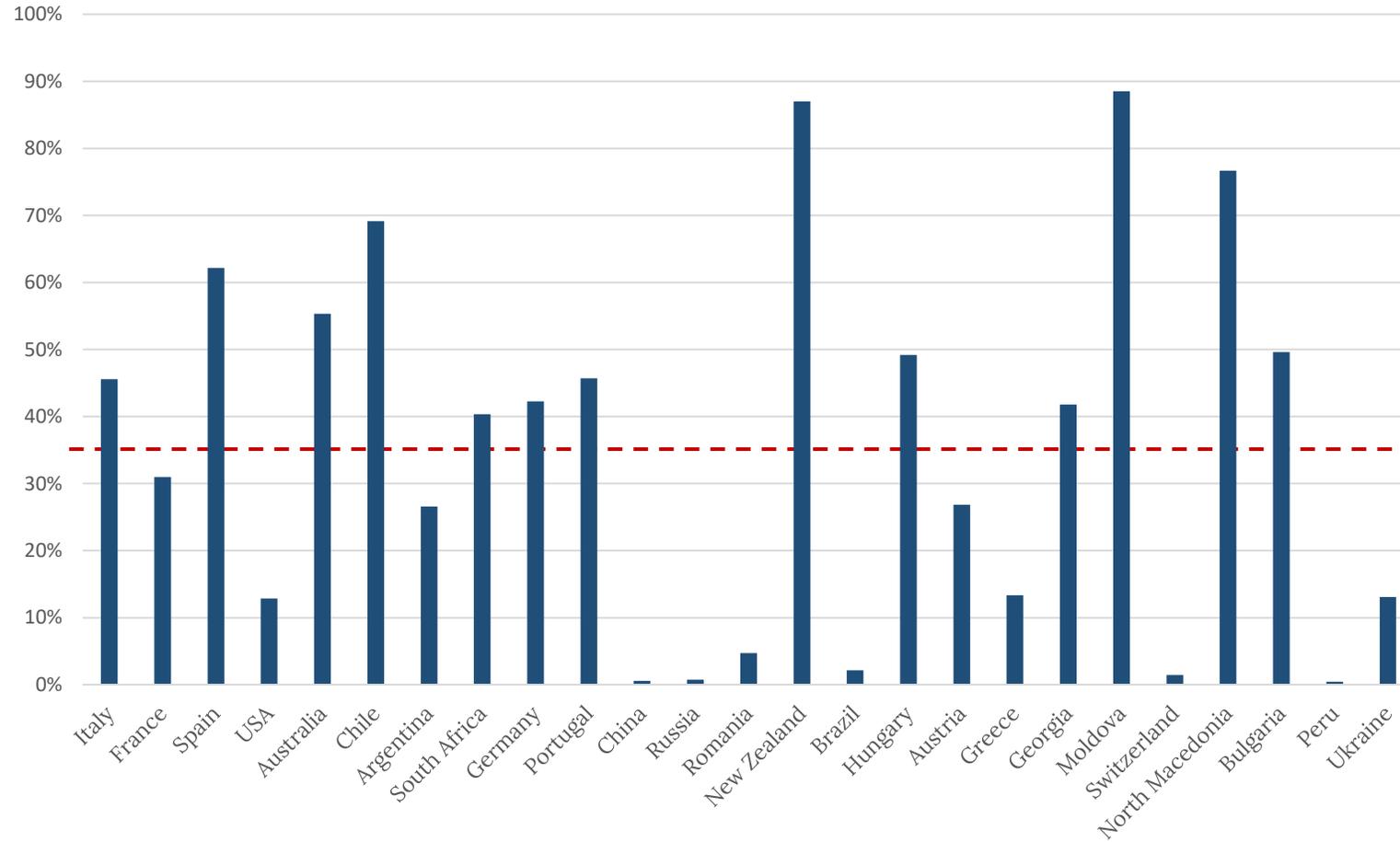
Low intensity
<20%

2

Balanced
20% - 50%

3

High intensity
>50%

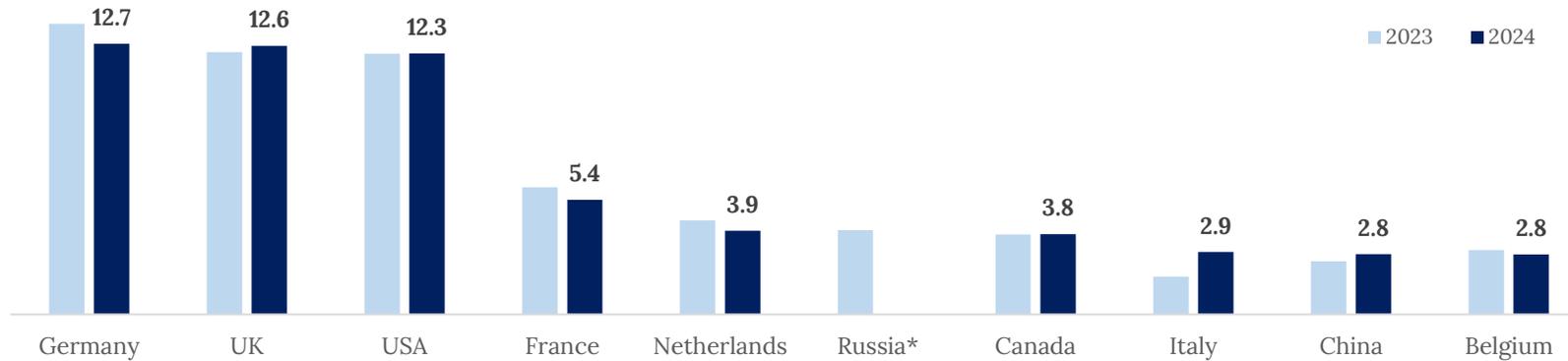


Avg.
35%



Main Wine Importers

Top 10 importers by VOLUME (mhl)



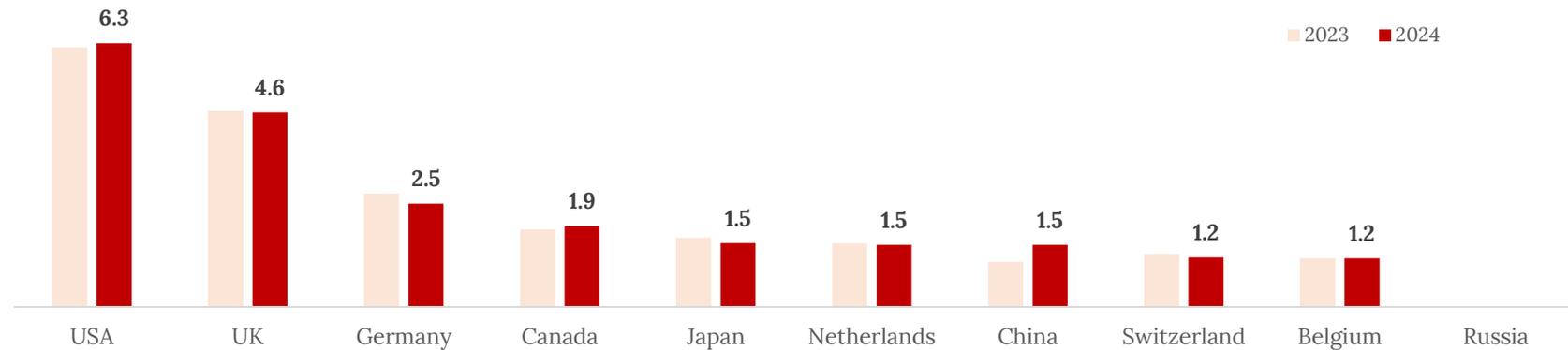
2024 vs. 2023

DEU	-7%
GBR	+2%
USA	+0.1%
FRA	-10%
NLD	-11%
RUS	-
CAN	+1%
ITA	+66%
CHN	+14%
BEL	-4%

2024 vs. 2023

USA	+2%
GBR	-1%
DEU	-9%
CAN	+4%
JPN	-8%
NLD	-2%
CHN	+38%
CHE	-7%
BEL	-0.2%
RUS	-

Top 10 importers by VALUE

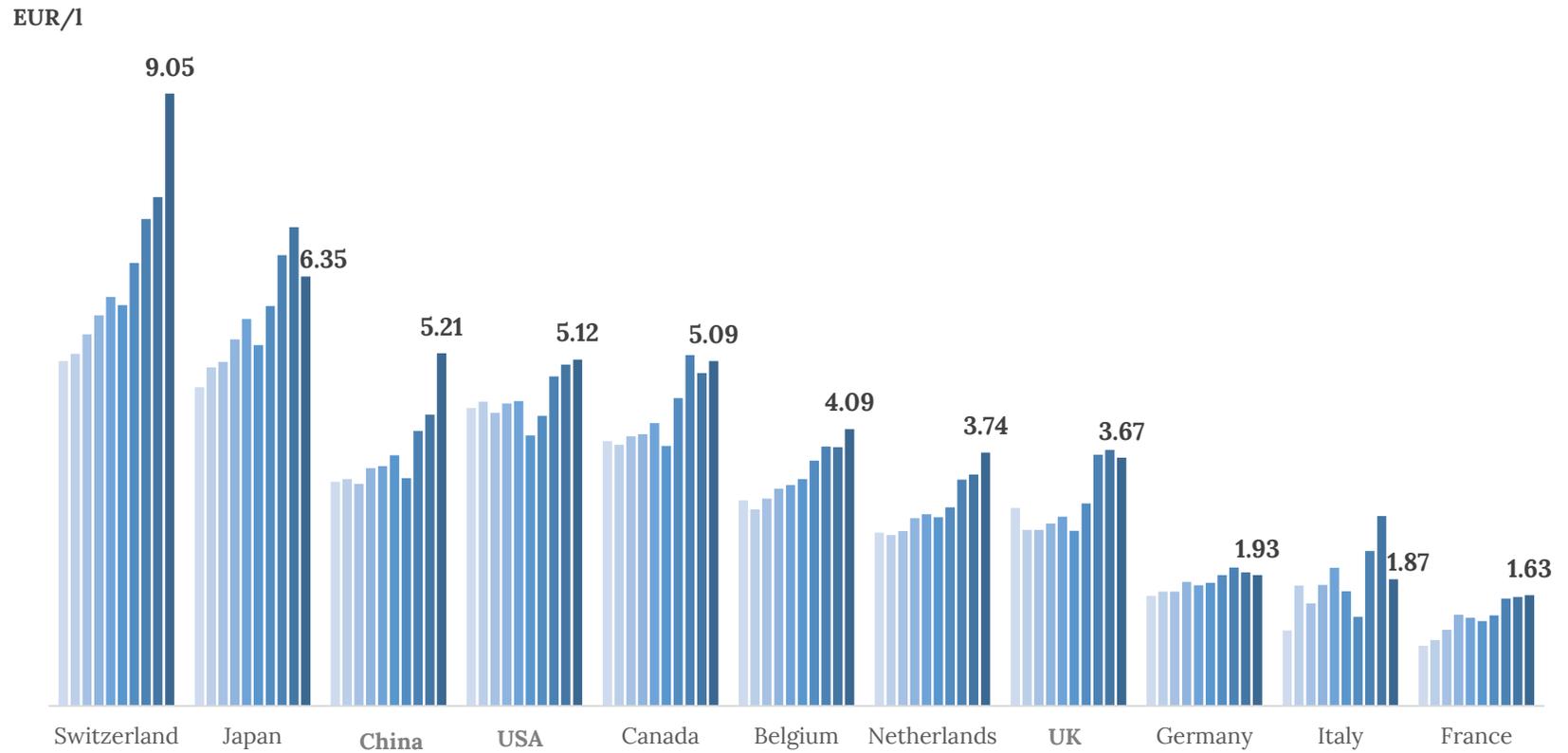


*2024 data on Russia not available



Main Wine Importers

Major Importers* by Average Import Price, 2015-2024



2024 vs. 2023

CHE	+20%
JPN	-10%
CHN	+21%
USA	+2%
CAN	+4%
BEL	+7%
NLD	+10%
GBR	-3%
DEU	-2%
ITA	-33%
FRA	+1%

*Countries listed as top 10 importers, by volume or value in 2024 (data on Russia not available)



1

Low intensity
<20%

2

Balanced
20% - 50%

3

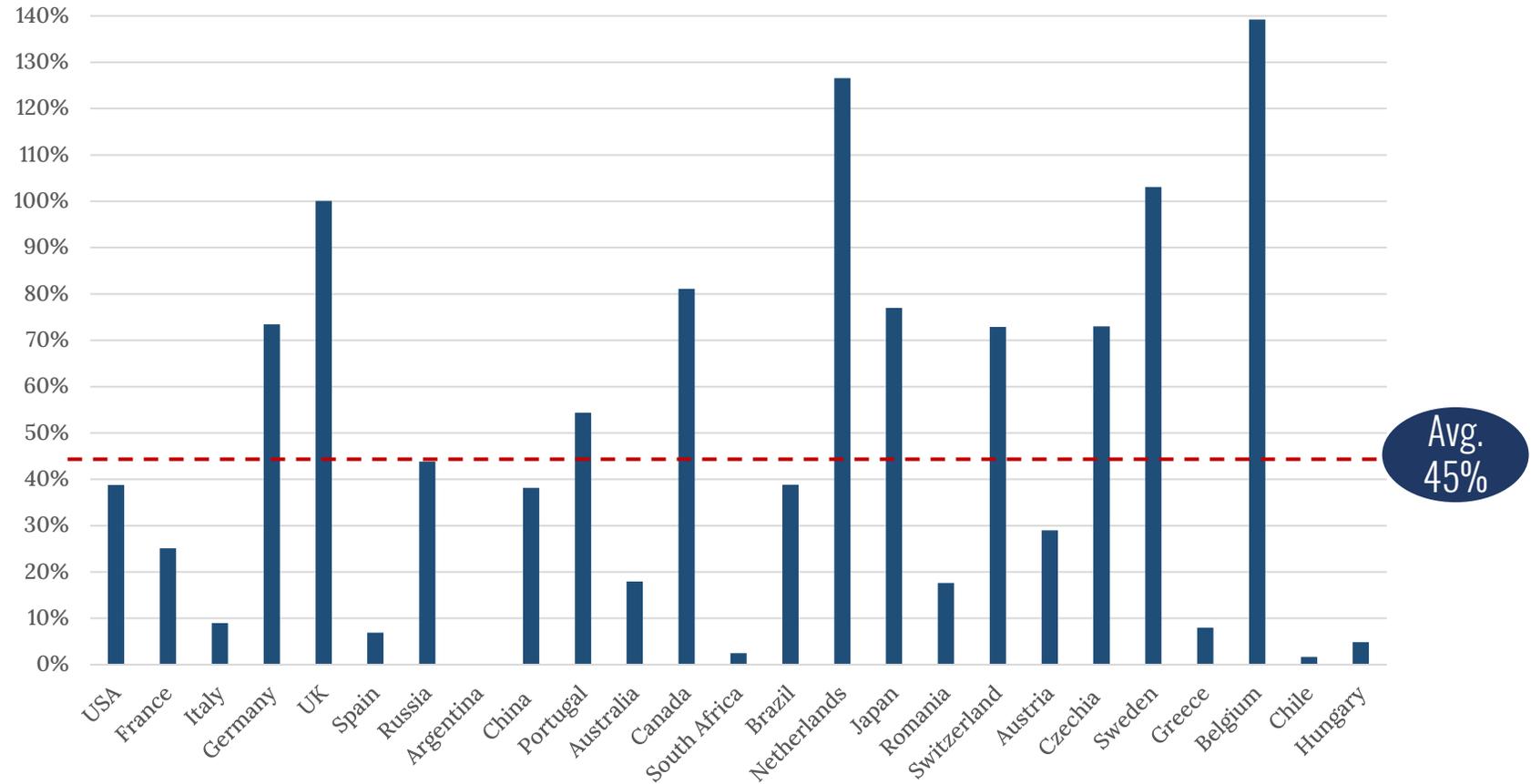
High intensity
>50%

4

Re-exporters
>100%

Import Intensity Index

% Imports / Prod (avg. 2020-2024)



Global re-exports of wine

Publication
May 2025

Key Figures
(avg. 2018-2023)

Volume
14 mhl

13.3%

Value
€4.6 bn

13.5%

Av. price:
3.3 €/l



+ 30% pts since 1990



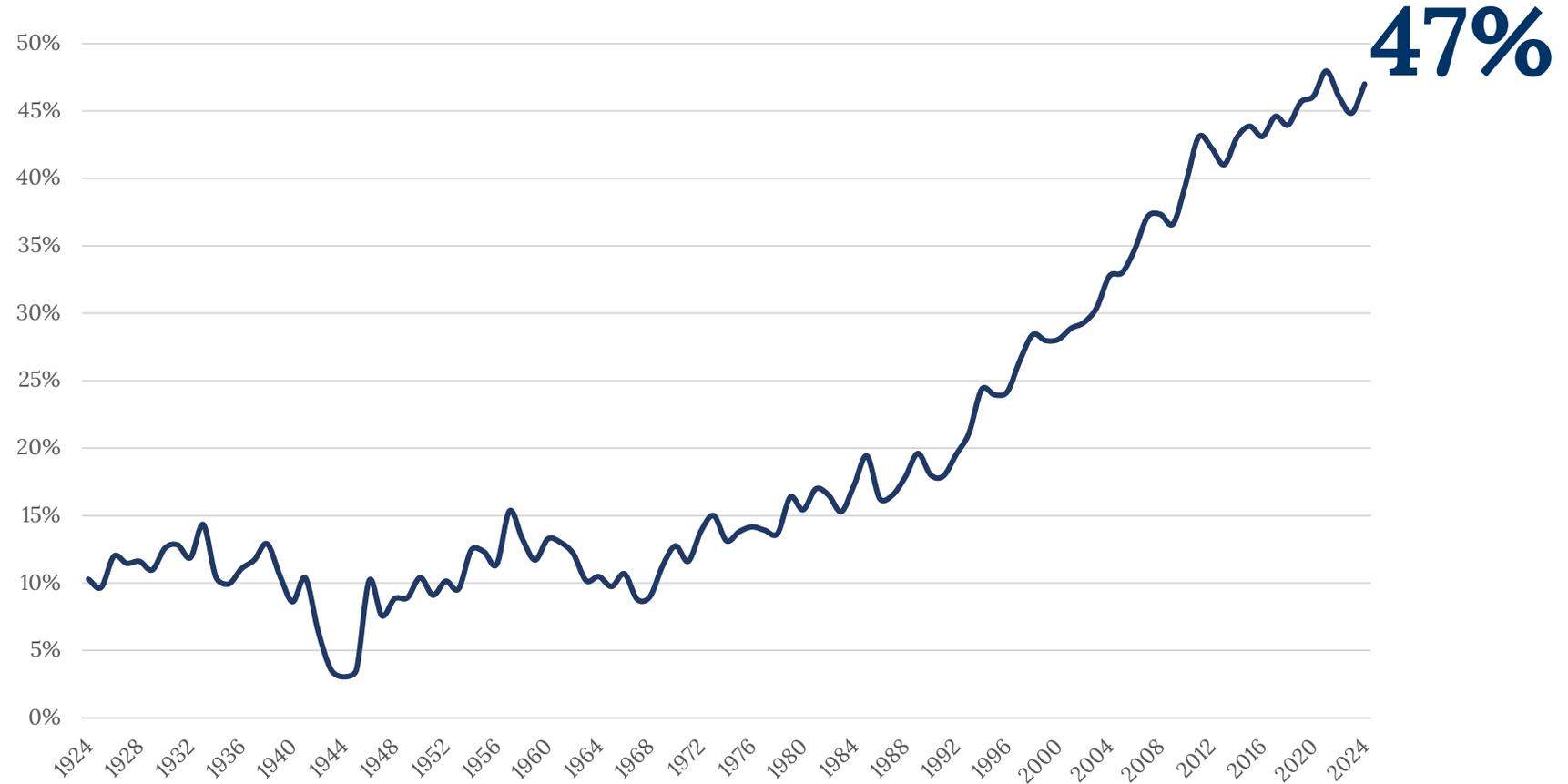
47% of wine consumed is imported



Highly globalised sector

Market Internationalisation Index

the percentage of wine consumption that comes from imports





Wine Production in the Southern Hemisphere in 2025

First Preliminary Estimates



First Estimates Wine Production 2025

2025 vs. 2024

Argentina

Chile

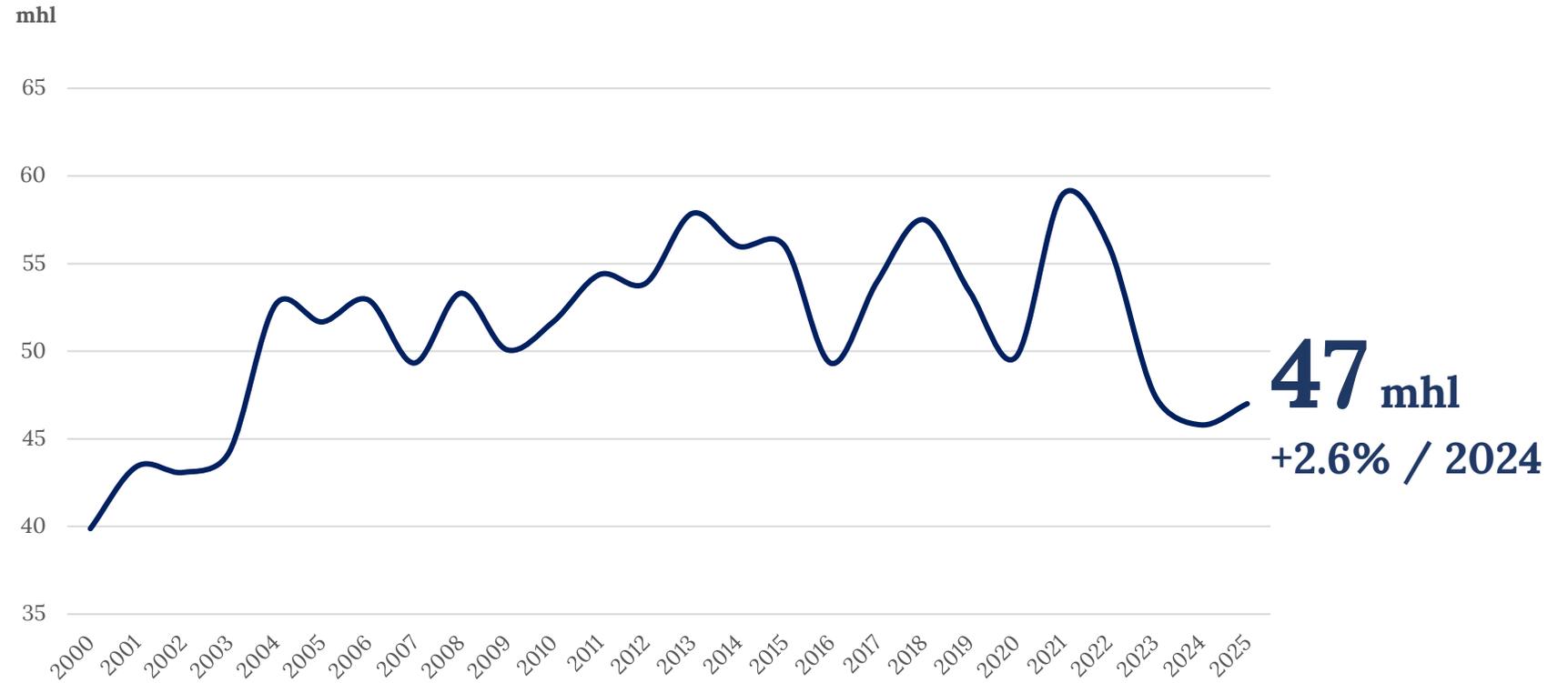
Brazil

South Africa

Australia

New Zealand

Evolution of Southern Hemisphere Wine Production





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