STATE OF THE WORLD VINE AND WINE SECTOR IN 2022

OIV

Abbreviations
ha: hectares
kha: thousands of hectares
mha: millions of hectares
l: litres
khl: thousands of hectolitres
mhl: millions of hectolitres
m: million
bn: billion
EUR: euros
Prov.: provisional
Prel.: preliminary

THE YEAR 2022 IN A NUTSHELL

The year 2022 was marked by high inflation, the energy crisis caused by the conflict in Ukraine, and global supply chain disruptions. In such context, many markets saw significant increases in wine prices which lead to a slight decrease in volumes consumed worldwide. Overall value of global wine exports is the highest ever recorded.

Highlights

• The world vineyard surface area is estimated to be 7.3 mha in 2022, only marginally lower compared to 2021 (-0.4%). The surface area of the world vineyard seems to have stabilised since 2017. The current stabilisation, however, hides heterogeneous evolutions in the main vine growing countries.

• World wine production in 2022 is estimated at 258 mhl, marking a slight decrease of 1% compared to 2021. This is due to higher-than-expected harvest volume in Europe, despite the drought and heat waves during spring and summer, and average production level recorded in the Southern Hemisphere.

• World wine consumption in 2022 is estimated at 232 mhl, marking a decrease of 2 mhl compared to 2021. The war in Ukraine and the associated energy crisis, together with the global supply chain disruptions, lead to a spike in costs in production and distribution. This resulted in significant increases in wine prices for the consumers. In such a context, wine consumption behaviours at country level have been quite heterogenous across geographical regions.

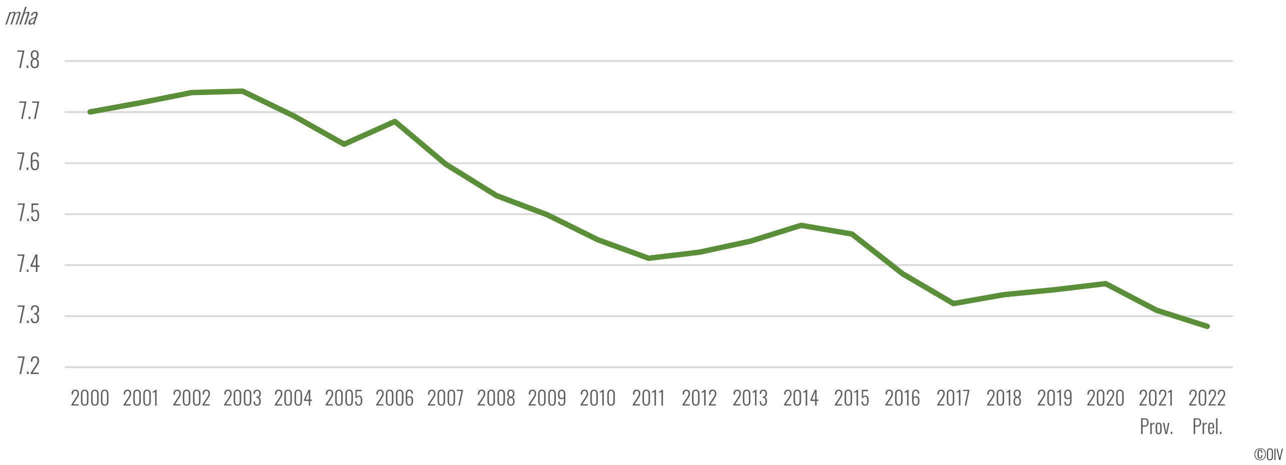
• Wine exports in 2022 were severely impacted by high inflation and global supply chain disruptions that led to significant slowdown of sea freight. This combination of events resulted in an overall lower volume of wine exported at a much higher average price (+15% compared to 2021), with global wine exports value estimated at 37.6 bn EUR, the highest figure ever recorded.

1 • VINEYARD SURFACE AREA

The world vineyard surface area is estimated to be 7.3 mha in 2022, only marginally lower compared to 2021 (-0.4%).
The world area under vines refers to the total surface area planted with vines for all purposes (wine and juices, table grapes, and dried grapes), including young vines that are not yet productive. As figure 1 below depicts, the surface area of the world vineyard seems to have stabilised since 2017. The current stabilisation, however, hides heterogeneous evolutions in the main vine growing countries.

In particular, in 2022 contrasting trends are seen in three main blocks of countries. On one side, countries like Moldova, Türkiye, Spain, Argentina and the USA are driving the world vineyard surfaces downward. On the contrary, France along with other major vineyards like India, Russia and Brazil, have experienced an increase in their vineyard surface areas. The other major vine-growing countries, such as China, Italy, Chile and Australia recorded stable surface areas, without significant changes with respect to 2021. These different trends tend to balance out their effects at the world-level.

Figure 1 • Evolution of the world vineyard surface area



Trends in the main vine-growing countries

The vineyards in the **European Union (EU)** seem to have overall stabilised in the recent years and stand at **3.3 mha**. This stability can be attributed to the management of viticultural production potential[1], which since 2016 has enabled EU Member States to authorise planting of up to an annual growth of 1% of the vineyard already planted.

Looking at the EU Member States, **Spain**, the largest vineyard in the world, accounts for **955 kha** in 2022, and has decreased by 0.8% compared to 2021. In contrast, **France**, with the second largest area under vines, has increased the size of its vineyard (+ 0.8%) compared to 2021 and stands at **812 kha**. **Italy** has **718 kha** of surface area under vines, stabilising after the expansion recorded between 2016 and 2020.

Most of the other major vineyards in the EU have remained stable compared to 2021: it is the case of **Portugal (193 kha**, -0.5% / 2021), **Romania (188 kha**, -0.3% / 2021), and **Germany (103 kha**, 0.0% / 2021).

Outside the EU, **Moldova** continues the downward trend that began in 2018, with a significant drop in vineyard surface area to **122 kha** in 2022 (-11.6% / 2021). This decline can be explained by the effects of a restructuring program of the wine sector. **Russian vineyard** on the other hand, has increased its size for the fifth year in a row, reaching **99 kha** in 2022 (+1.4% / 2021).

Türkiye has an estimated vineyard surface area of **410 kha** in 2022. Türkiye remains the fifth largest vineyard in the world in 2022, even though vineyard surface area has continued to decline since 2000.

[1]Regulation (EU) No. 1308/2013 introduced in 2016, a tool for the management of viticultural production potential, based on a system of new planting authorisations, replacing the former planting-rights system.

After a long period of significant expansion from 2000 to 2015, the growth of the **Chinese vineyard** (third in the world) in the recent years is slowing down and in 2022, is estimated to be in line with 2021, at **785 kha**.

In the **USA**, the vineyard has been consistently decreasing since 2014, and in 2022 its surface area is estimated to be **390 kha**, which is slightly below than the previous year. Among other factors, this reduction in size has been called for in the recent years to overcome a grapes oversupply issue in California.

In South America, **Argentina's** vineyard surface has been on a decline since 2015 and reaches **207 kha** in 2022. It records a reduction of 4 kha, that is -2% compared to 2021. Argentina's reduction in its vineyard surfaces can be explained by climatic factors such as water scarcity, rising temperatures, and drought-like conditions.

The size of the vineyard in **Chile** in 2022 remained almost unchanged compared to 2021, reaching **196 kha** in 2022. After eight years in a row of continuous decline, **Brazil**, increases the size of its vineyard in 2022 by 0.8%, reaching **81 kha**.

In 2022, the size of the vineyard in **South Africa** is estimated at **124 kha**, a fall of 1% compared to 2021. This is the eighth year in a row that South Africa sees the reduction in size as consequence of a severe drought that took place between 2015 and 2017.

In Oceania, the largest vineyard is **Australia** and in 2022 it is estimated to remain at a level in line with the average observed in the last five years, at **146 kha**.

Figure 2 • Vineyard surface area of major vine-growing countries[2]

kha	2018	2019	2020	2021 Prov.	2022 Prel.	22/21 % Var.	2022 % world
Spain	972	966	961	963	955	-0.8%	13.1%
France	792	794	799	805	812	0.8%	11.2%
China	779	781	783	785	785	0.0%	10.8%
Italy	705	714	719	718	718	0.0%	9.9%
Türkiye	448	436	431	419	*410*	-2.3%	5.6%
USA	408	407	402	393	*390*	-0.8%	5.4%
Argentina	218	215	215	211	207	-1.9%	2.8%
Chile	208	210	207	196	196	0.0%	2.7%
Portugal	192	195	195	194	193	-0.5%	2.7%
Romania	191	191	190	189	188	-0.3%	2.6%
India	149	151	161	167	*170*	2.0%	2.3%
Iran	167	167	170	158	*158*	0.0%	2.2%
Australia	146	146	146	146	146	0.0%	2.0%
South Africa	130	129	128	126	124	-1.2%	1.7%
Moldova	143	143	140	138	122	-11.6%	1.7%
Uzbekistan	108	112	114	118	*118*	0.0%	1.6%
Afghanistan	94	96	100	104	*104*	0.0%	1.4%
Germany	103	103	103	103	103	0.0%	1.4%
Russia	94	96	97	98	99	1.4%	1.4%
Greece	108	109	112	96	*96*	0.0%	1.3%
Egypt	80	78	85	92	*92*	0.0%	1.3%
Brazil	82	81	80	81	81	0.8%	1.1%
Algeria	75	74	75	68	*68*	0.0%	0.9%
Bulgaria	67	67	66	65	65	0.1%	0.9%
Hungary	69	68	65	64	*64*	0.0%	0.9%
Other countries	814	821	821	814	814	0.0%	11.2%
World total	**7342**	**7352**	**7364**	**7312**	**7280**	**-0.4%**	**100.0%**

Figure in Italics: OIV estimate
Sources: OIV, FAO. National Statistical Offices

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[2] This table refers to total surface area planted with vines for all purposes (wine and juices, table grapes and raisins), including young vines not yet in production; it includes all countries with vineyards larger than 50 kha in 2022.

2 • WINE PRODUCTION

World wine production, excluding juices and musts, in 2022[3] is estimated at 258 mhl, marking a decrease of almost 3 mhl (-1%) compared to 2021. This is due to higher-than-expected harvest volume in Europe and the USA (despite the drought and heat waves during spring and summer) and average production level recorded in the Southern Hemisphere. Overall, in 2022 the dry and hot conditions observed across different regions of the world have led to early harvests and average volumes. As shown in figure 3, world wine production is stable around 260 mhl for the fourth consecutive year, only slightly below its 20-year average.

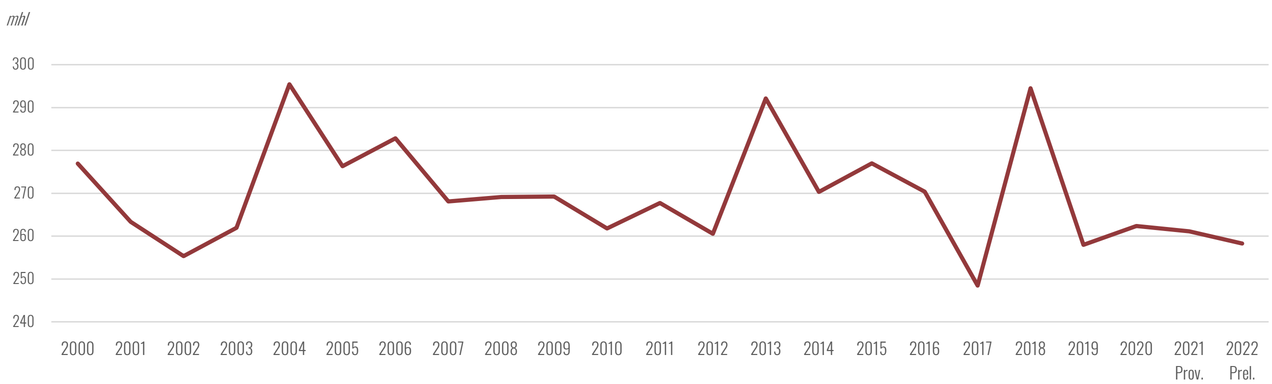
Trends in the main wine-producing countries in the Northern Hemisphere

Vinified production in the **EU** in 2022 is **161.1 mhl**, which represents an increase of 4% compared to 2021 and is in line with its last five-year average. A series of adverse weather events - spring frost, hail, excess heat, and drought - have been observed all along the 2022 growing season. Spring and summer heatwaves across Europe have resulted in early ripening. At the beginning of the season, there was widespread concern that yields were expected to be lower due to extreme heat and lack of rainfall in many areas. However, in the end, the absence of major grape diseases and late summer rains made up for it, resulting in higher yields than initially expected in several regions and countries.

Italy (49.8 mhl), France (45.6 mhl), and Spain (35.7 mhl), together account for 51% of the world wine production in 2022. Among these top three wine producers, Italy is relatively stable in terms of wine production, with -1% compared to 2021 and +2% with respect to its last five-year average. France on the other hand records an increase in wine production not only compared to the low volume of 2021 (+21%) but also with respect to its last five-year average (+7%). Notwithstanding drought and limited access to water in many regions, Spain's 2022 wine production levells off at +1% compared to 2021, but it is 5% below its last five-year average.

Among the other major EU countries, **Germany** is the only country that has witnessed a rise in wine production level in 2022. Recording a level of **8.9 mhl**, Germany's wine production is 6% higher than 2021, due to the dry and hot growing season which has been beneficial for vineyards. All the other main wine producing countries in the EU have recorded negative variations in their 2022 production levels: **6.8 mhl** in **Portugal** (-8% / 2021), **3.9 mhl** in **Romania** (-19% / 2021), **2.9 mhl** in **Hungary** (-6% / 2021), **2.3 mhl** in **Austria** (-5% / 2021), and **2.1 mhl** in **Greece** (-14% / 2021). It is noteworthy to mention that in 2022 the Greek wine production volume is one of the lowest level recorded in the last decades.

Figure 3 • Evolution of world wine production (juices and musts excluded)



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[3] This is the production resulting from wine grapes harvested at the start of 2022 in the Southern Hemisphere and at the end of 2022 in the Northern Hemisphere.

Concerning countries outside the EU, **Russia** (**4.7 mhl**) increases its 2022 wine production by 4% compared to 2021. Wine production in **Georgia** in 2022 is estimated to be at **2.1 mhl**, an increase of 2% compared to the already large production of 2021. This volume is due to favourable weather conditions that lead to high grape yields and a governmental subsidy program that has pushed production to record levels. **Moldova's** vinified production is estimated at **1.4 mhl**. This level is 2% lower than the wine production in 2021. **Switzerland** records a production of **1.0 mhl**, which is not only 63% higher than the extremely low volume of 2021, but also 15% higher than the average observed over the last five years. The heat waves experienced across Europe were beneficial for Swiss vineyards, which are at relatively high altitudes.

In Asia, **China's** wine production level in 2022 is estimated to reach a level of **4.2 mhl**, marking a reduction of 29% compared to 2021. Chinese wine production has been declining for the last decade[4].

In North America, attributing to early frost damages, drought-like conditions in summer and consequent lack of water supply in certain wine regions, wine production in the **USA** in 2022 is estimated to be at **22.4 mhl**, a level 7% lower than 2021 and 9% lower than its five-year average.

Trends in the main wine-producing countries in the Southern Hemisphere

The majority of South American wine-producing countries have registered a fall in production with respect to 2021. **Chile** is the largest producer in South America in 2022, with wine production peaking at **12.4 mhl**, 7% below last year's exceptionally high production (but 7% above its last five-year average). In 2022, due to extremely variable weather conditions (frost, heavy rainfalls, etc.), **Argentina**, records a decrease in its wine production, reaching **11.5 mhl**. This represents a decline of 8% compared to 2021 and 9% in comparison to its last five-year average. Lastly, **Brazil** experiences an increase in its wine production in 2022, with a level of **3.2 mhl** (+9% / 2021 and +14% / five-year average). This exceptionally high volume is due to La Niña meteorological events.

South Africa's 2022 wine production is **10.2 mhl**, a decrease of 6% compared to its 2021 level. The 2022 volume is back to the average production levels recorded before the beginning of the drought that, starting from 2015, heavily impacted the country's wine production for several years in a row.

In Oceania, **Australia** in 2022 produces **12.7 mhl** (-14% / 2021). After a very low production in 2020 due to dry conditions, fires, and smoke damage in some wine regions, and a rebound in 2021, 2022 is in line with its last five-year average. **New Zealand** produces a level of **3.8 mhl** in 2022 (+44% / 2021). While in 2021 New Zealand was the only major Southern Hemisphere country to have a below-average wine grape harvest, in 2022 it sees a record-high wine production level. A mix of excellent climatic conditions and high international demand has certainly contributed to this historically high harvest volume.

[4] The decline of wine production in China is the consequence, among other factors, of a reduction in internal demand, as well as certain structural problems such as difficult climate conditions, technological constraints, and an overall low productivity of the sector.

Figure 4 • Wine production (juices and musts excluded) in major countries[5]

mhl	2018	2019	2020	2021 Prov.	2022 Prel.	22/21 % Var..	2022 % world
Italy	54.8	47.5	49.1	50.2	49.8	-1%	19.3%
France	49.2	42.2	46.7	37.6	45.6	21%	17.7%
Spain	44.9	33.7	40.9	35.5	35.7	1%	13.8%
USA	*26.1*	*25.6*	*22.8*	*24.1*	*22.4*	-7%	8.7%
Australia	12.7	12.0	10.9	14.8	12.7	-14%	4.9%
Chile	12.9	11.9	10.3	13.4	12.4	-7%	4.8%
Argentina	14.5	13.0	10.8	12.5	11.5	-8%	4.4%
South Africa	9.5	9.7	10.4	10.8	10.2	-6%	3.9%
Germany	10.3	8.2	8.4	8.4	8.9	6%	3.5%
Portugal	6.1	6.5	6.4	7.4	6.8	-8%	2.6%
Russia	4.3	4.6	4.4	4.5	4.7	4%	1.8%
China	*9.3*	*7.8*	*6.6*	*5.9*	*4.2*	-29%	1.6%
Romania	5.1	3.8	4.0	4.8	3.9	-19%	1.5%
New Zealand	3.0	3.0	3.3	2.7	3.8	44%	1.5%
Brazil	3.1	2.2	2.3	2.9	3.2	9%	1.2%
Hungary	3.7	2.7	2.9	3.1	2.9	-6%	1.1%
Austria	2.8	2.5	2.4	2.5	2.3	-5%	0.9%
Georgia	1.7	1.8	1.8	2.1	2.1	2%	0.8%
Greece	2.2	2.4	2.3	2.5	2.1	-14%	0.8%
Moldova	1.9	1.5	0.9	1.4	1.4	-2%	0.5%
Switzerland	1.1	1.0	0.8	0.6	1.0	63%	0.4%
Other countries	15.3	14.4	14.0	13.4	10.6	-21%	4.1%
World total	**294**	**258**	**262**	**261**	**258**	**-1%**	**100%**

Figure in italic: estimate OIV
Sources: OIV, EC DG AGRI, FAO, National Statistical Offices, Specialised Press

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[5] Countries with a wine production equal to or above 1 mhl in 2022.

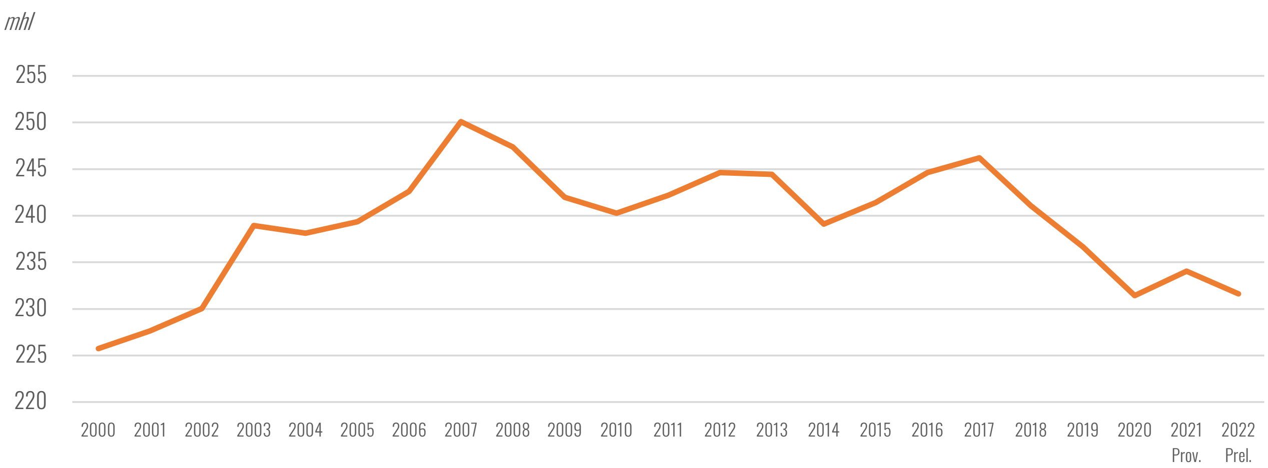
3 • WINE CONSUMPTION

World wine consumption in 2022 is estimated at 232 mhl, marking a decrease of 2 mhl (-1%) compared to 2021.

Starting in 2018, global wine consumption has decreased at a regular rate. This negative trend can be mainly attributed to the decline in China's consumption, which has lost on average 2 mhl per year since 2018. This downward trend was accentuated in 2020 by the Covid-19 pandemic, which brought a depressing effect on many large wine markets.

Consumption was hit by lockdown measures, the disruption of the HoReCa channel, and an overall lack of tourism. In 2021, the uplifting of restrictions pertaining to movement of people and goods, reopening of HoReCa channel and the revival of social gatherings and celebrations have, as anticipated, contributed to an increase in consumption in most countries around the world. In 2022, however, the war in Ukraine and the associated energy crisis, together with the global supply chain disruptions, lead to a spike in costs in production and distribution. This resulted in significant increases in wine prices for the consumers. In such a context, wine consumption behaviours at country level have been quite heterogenous across geographical regions.

Figure 5 • Evolution of world wine consumption



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Trends in the main wine consuming countries

Estimates of national wine consumption levels presented in this chapter should be interpreted cautiously, given the intrinsic limitations of the "apparent consumption" methodology[6], especially for the numerous countries where data on stock variations, losses, or industrial uses of wine, are not fully known or assessed.

In 2022, the **EU**, with a wine consumption estimate of **111 mhl**, accounts for 48% of the world consumption. This figure is 2% lower than the level estimated in 2021 and brings the EU wine consumption slightly below its last ten-year average. In terms of relative weight over the world wine consumption, the EU share has significantly decreased since 2000, when it was estimated at 59%. This is the combined effect of the rise of new markets in the world and an overall reduction of wine consumption in traditional producing countries within the EU, which today in total consume about 20 mhl less than in 2000 (-15%).

Within the EU, **France** with an estimate of **25.3 mhl** in 2022, is the largest consuming country (and the second largest in the world). This is the second consecutive year of positive growth after the fall of consumption caused by the Covid-19 sanitary crisis. **Italy**, second largest market in the EU and third at world level, has an estimated wine consumption of **23.0 mhl** in 2022, down 5% on 2021, but in line with its five-year average. Maintaining its position of third largest consumer within the EU (and fourth at world level), **Germany** records a consumption volume of **19.4 mhl** in 2022 (-3% / 2021). **Spain** remains stable at **10.3 mhl** in 2022 (-0.1% / 2021), a level in line with its pre-pandemic level. **Portugal** with **6.0 mhl** shows an increase in its wine consumption level in 2022, not only compared to 2021 (+14% / 2021) but also to its last five-year average (+19%). **Romania** (**3.7 mhl**, -0.2% / 2021) remains stable. **Netherlands** (**3.6 mhl**, -3% / 2021) experiences a negative trend compared to 2021 but settles close to the five-year average. **Austria** (**2.4 mhl**, -0.4% / 2021) shows a stable consumption trend over the last years. Similarly, **Czech Republic** (**2.2 mhl**, +0.3% / 2021) remains flat from 2021 but up 6% compared to the five-year average. **Belgium** (**2.0 mhl**, -15% / 2021) and **Sweden** (**2.0 mhl**, -6% / 2021) decline in their wine consumption levels in 2022, both year-over-year and on their last five-year averages.

In Europe, but outside the EU, the **UK** - the fifth largest wine consuming country in the world - shows a slight decrease in wine consumption in 2022, estimated at **12.8 mhl** (-2% / 2021). **Russia's** wine consumption is estimated at **10.8 mhl**, with a rise of 3% compared to 2021, continuing its growth path since 2018. **Switzerland's** wine consumption is on a rise for the second year in a row, reaching **2.6 mhl** (+3% / 2021).

The **USA**, in 2022, continues to remain the largest wine consuming country in the world. With a volume estimated at **34.0 mhl**, its consumption has increased by almost 3% compared to 2021, and now it is back to its pre-pandemic levels.

Moving to Asian markets, **China's** 2022 wine consumption is estimated at **8.8 mhl**[7] , accounting for a 16% drop with respect to 2021. This is due to overall decline in internal demand, which has had a significant impact on the fall in global consumption, as mentioned above. The second highest consuming country in Asia is **Japan**, which is estimated to have a wine consumption level in 2022 of **3.4 mhl** (+2% / 2021), but 3% below its last five-year average.

In South America, the largest consuming country in 2022 is **Argentina** with **8.3 mhl**, which is lower by 1.3% with respect to 2021. This confirms the decreasing trend started at the beginning of this century. **Brazil**, second largest market in South America, with a level of **3.6 mhl** in 2022, has decreased its consumption by 12.9% with respect to the record-high volumes registered in 2020 and 2021.

In **South Africa**, estimated consumption in 2022 is **4.6 mhl**, an increase of 16% compared to 2021. This level is the highest consumption level ever recorded.

In **Australia**, 2022 wine consumption is estimated at **5.5 mhl** (-3% / 2021), down for the second year in a row and 2% below the average of the previous five years.

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[6] Apparent wine consumption is a proxy measure for consumption defined as production plus imports minus exports adjusting for changes in inventories.
[7] This apparent consumption should be interpreted carefully because low production levels - like the ones recorded in 2019-2022 and the large data revisions made by the National Bureau of Statistics (NBS) In China regularly, can strongly impact the estimation of 2022 wine consumption volume.

Figure 6 • Wine consumption in major countries[8]

mhl	2018	2019	2020	2021 Prov.	2022 Prel.	22/21 % Var	2022 % world
USA	*33.7*	*34.3*	*32.9*	*33.1*	*34.0*	2.8%	15%
France	26.0	24.7	*23.2*	*24.9*	*25.3*	1.5%	11%
Italy	22.4	22.6	24.2	24.2	23.0	-5.0%	10%
Germany	20.0	19.8	19.8	19.9	*19.4*	-2.5%	8%
UK	12.9	13.0	13.2	*13.1*	*12.8*	-2.2%	6%
Russia	*9.9*	*10.0*	*10.3*	*10.5*	*10.8*	3.3%	5%
Spain	10.7	10.2	9.2	10.3	10.3	-0.1%	4%
China	*17.6*	*15.0*	*12.4*	*10.5*	*8.8*	-16.0%	4%
Argentina	8.4	8.9	9.4	8.4	8.3	-1.3%	4%
Portugal	5.1	5.4	4.4	5.3	6.0	14.3%	3%
Australia	5.3	5.8	6.0	5.7	*5.5*	-3.2%	2%
South Africa	4.2	3.9	3.1	3.9	4.6	15.8%	2%
Canada	*4.9*	*4.7*	*4.4*	*4.2*	*4.2*	-0.4%	2%
Romania	3.9	3.7	3.2	3.7	3.7	-0.2%	2%
Netherlands	*3.6*	*3.5*	*3.7*	*3.7*	*3.6*	-3.4%	2%
Brazil	3.3	3.6	4.1	4.1	3.6	-12.9%	2%
Japan	*3.5*	*3.5*	*3.5*	*3.3*	*3.4*	1.7%	1%
Switzerland	2.4	2.6	2.5	2.6	*2.6*	2.6%	1%
Austria	2.4	2.3	2.3	2.4	2.4	-0.4%	1%
Czech Republic	2.0	2.2	2.1	2.2	2.2	0.3%	1%
Belgium	*2.7*	*2.7*	*2.7*	*2.4*	*2.0*	-14.5%	1%
Sweden	*2.1*	*2.0*	*2.1*	*2.1*	*2.0*	-5.9%	1%
Other countries	34.2	32.4	32.8	33.6	33.1	-1.4%	14%
World total	**241**	**237**	**231**	**234**	**232**	**-1.0%**	**100%**

Figure in italics: OIV estimates
Sources: OIV, FAO, National Statistical Offices, Specialised Press

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[8] Countries with wine consumption equal to or above 2 mhl in 2022.

4 • INTERNATIONAL TRADE OF WINE

After the global trade disruptions in 2020 due to the restrictions related to the Covid-19 pandemic, followed by a record-high year that seemed to put the world wine export market on its path to reconciliation, 2022 wine exports were severely impacted by the war in Ukraine and the energy crisis that generated a strong inflationary pressure on all major economies. At the same time, the year 2022 was marked by global supply chain disruptions that led to significant slowdown of sea freight. This combination of events resulted in an overall lower volume of wine exported at a much higher average price (+15% compared to 2021), with global wine exports value estimated at 37.6 bn EUR, the highest figure ever recorded. However, it should be noted that this sharp rise in prices is mostly driven by the higher costs bored by producers, importers, distributors and retailers.

World trade volume

In 2022, global wine exports amount to 107 mhl, a 5% decrease compared to the historically high 2021. Italy is the largest exporter in 2022 with 21.9 mhl, accounting for 20% of the global exports. Developments in exported volumes at country level in 2022 have mostly recorded negative growths, with only a few exceptions. The largest contributors to this decline in world trade volume are Spain (-2.4 mhl / 2021), Argentina (-0.7 mhl / 2021), France (-0.7 mhl / 2021), the USA (-0.5 mhl / 2021), and South Africa (-0.4 mhl / 2021). Among top exporting countries, only Australia and Canada have not recorded a decline compared to their 2021 export volumes.

World trade value

Notwithstanding the decrease in volume, **2022 global wine export value is at a record-high 37.6 bn EUR, 9% higher than 2021**. This is the consequence of a sharp rise in average export prices in all major wine exporting countries. In terms of value, France confirms its position as the first world exporter in 2022, with wine exports worth 12.3 bn EUR, accounting for almost one third of global exports value. The countries that contributed the most to this significant rise in value at world level are France (+1.2 bn EUR / 2021), Italy (+717 m EUR / 2021), Chile (+154 m EUR / 2021) and the USA (+148 m EUR / 2021).

Figure 7 • Evolution of the average price of world wine exports

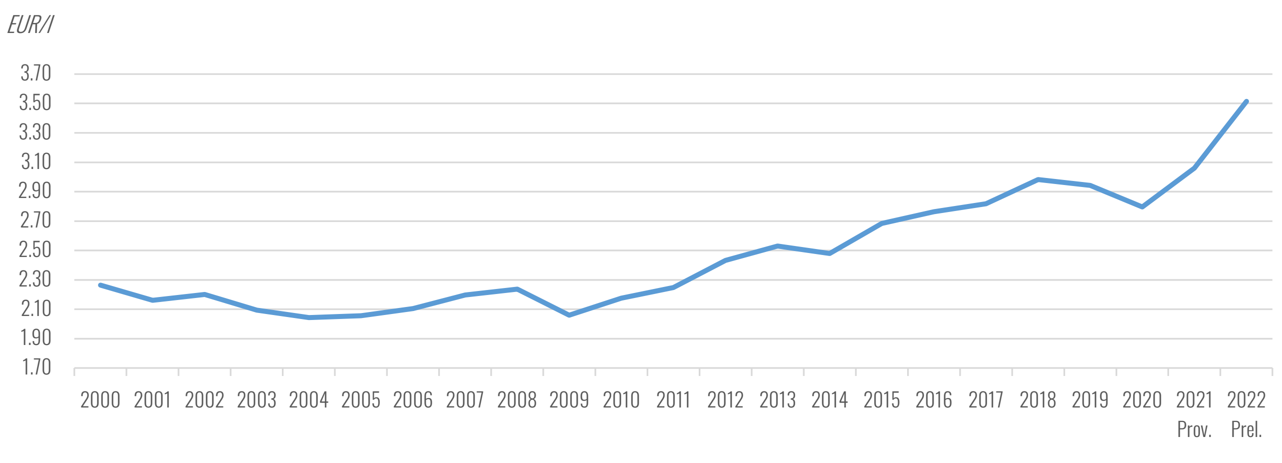

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Figure 8 • Evolution of international trade of wine by volume

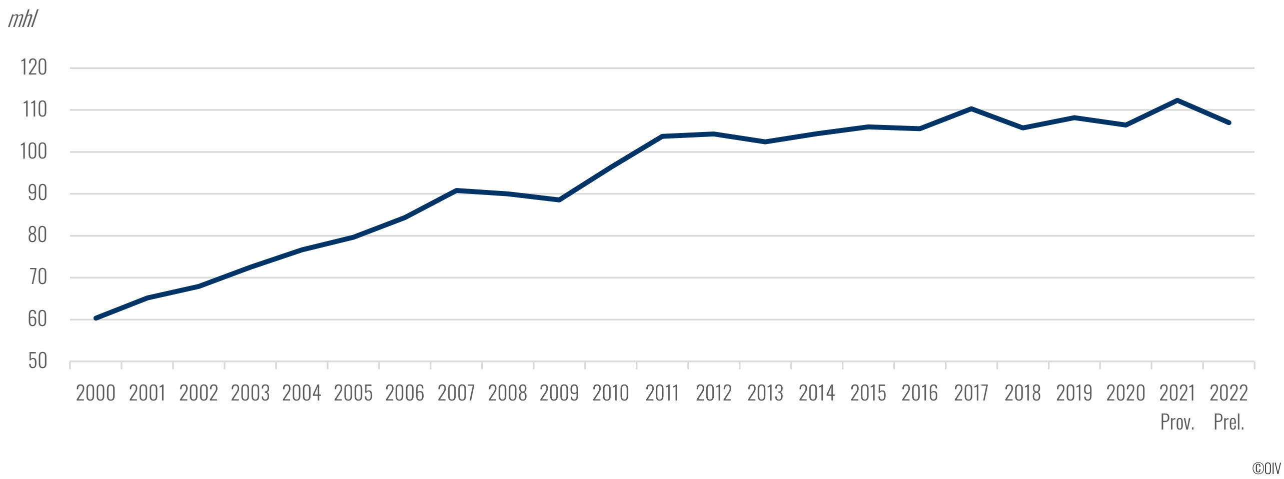
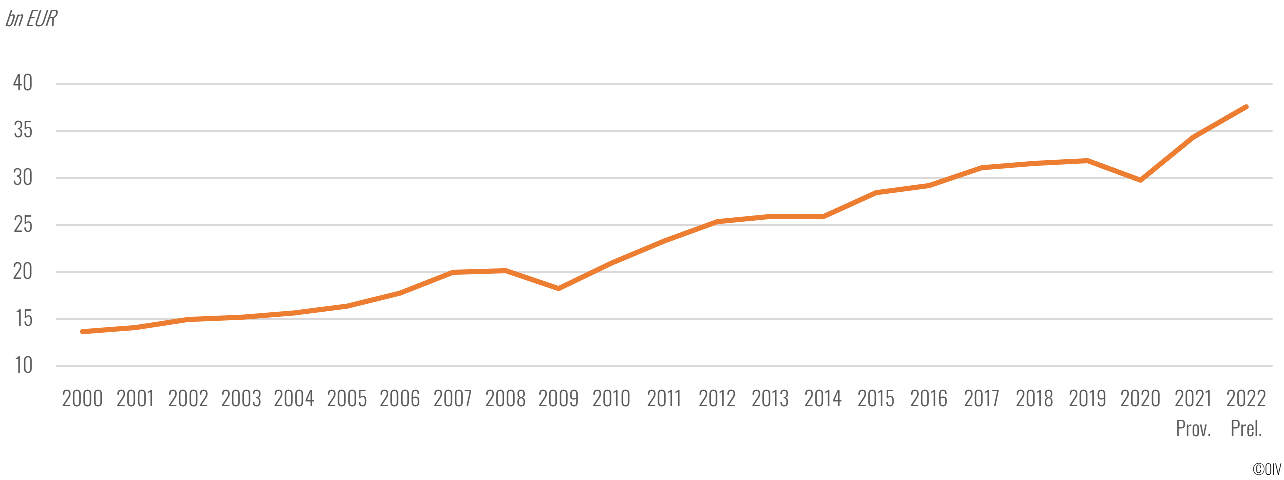


Figure 9 • Evolution of international trade of wine by value



World trade by product type

Bottled wine (< 2 litres) represents 53% of trade volumes globally in 2022, a share in line with that recorded in the last 10 years. In terms of value, this category constitutes 68% of the total value of wines exported in 2022 throughout the world. Overall bottled wine export has decreased by 4% in volume but increased by 7% in value as compared to 2021. The average export price observed for this category in 2022 is 4.5 EUR/l.

Sparkling wine has seen a very positive performance in 2022, as it is the only category that saw an increase both in terms of volume and value. Sparkling wine represents only 11% of the global volume exported but accounts for 23% in global world exports value, making it the second largest category in terms of value after still bottled wine. Sparkling wine has increased by 5% in volume and by 18% in value compared to 2021. France, Italy, and Spain – whose sparkling wine exports represent 17%, 24% and 8% of their total export volumes and 38%, 28%, and 17% of their total 2022 wine exports value respectively – confirm to be the top exporters of sparkling wine. The average export price observed in 2022 is 7.7 EUR/l.

Bag-in-Box® (BiB) refers to the trade of wines in containers holding more than 2 litres but less than 10 litres. In 2022, BiB represents a share of 4% in volume and 2% in value of the total world exports. With respect to 2021, this category has declined by 4% in volume and increased by 6% in value in 2022. Average export price was at 1.8 EUR/l.

Bulk wine (> 10 litres) exports, the second largest category in volume, decreased in terms of volume by 7% compared to 2021 but saw a +5% increase in export value. While bulk wine represents 32% of total world wine volume exports, it only comprises 7% of the total value of wine exports. This category recorded an average export price of 0.8 EUR/l in 2022.

Figure 10 • Breakdown of international trade of wine by product type

Global Wine Trade

Volume (mhl)		Value (bn EUR)		Type	Vertical Structure in 2022		Var. 22/21	
2021	2022	2021	2022		volume	value	volume	value
112.3	107.0	34.4	37.6	Bottled (< 2 l)	53%	68%	-4%	7%
				Sparkling	11%	23%	5%	18%
				BiB	4%	2%	-4%	6%
variation of -4.7%		variation of 9.4%		Bulk (> 10 l)	32%	7%	-7%	5%

Sources: OIV, GTA

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Main wine exporters

The international trade of wine is dominated by three EU countries - Italy, Spain, and France - which together exported 57 mhl in 2022, accounting for 53% of the world wine exports.

In terms of volume, these three countries have all declined with respect to 2021, although with different degrees: **Italy** exported **21.9 mhl** (only -0.6% compared to 2021), **Spain** with **21.2 mhl** exported saw the largest decrease with respect to 2021 (-10%), and **France** with **14.0 mhl**, recorded -5% with respect to 2021.

In terms of value, **France** remains the first exporter at world level in 2022 with **12.3 bn EUR** (+10.9% / 2021), followed by **Italy** (**7.8 bn EUR**, +10.1% / 2021) and **Spain** (**3.0 bn EUR**, +3.1% / 2021). These 3 countries account for 61% of the global exports in value.

The category of wine that performed relatively better on average in terms of value is sparkling wine, with +19% with respect to 2021 in both France and Italy. Bottled and bulk wine saw positive but limited growth, with the exception of French bulk wine exports that declined by 29% in volume and 17% in value.

Among the other large exporting countries of the EU, **Germany** (sixth exporter worldwide) saw a decrease of its exports in volume (**3.5 mhl**, -6% / 2021), but an increase of 4% in value, reaching **1.0 bn EUR**. **Portugal** (seventh world exporter) shows a more stable situation in 2022 with a -0.4% in volume (**3.3 mhl**) and +1.3% in value (**940 m EUR**). In both countries, sparkling and bulk wine export value had very high growth rates in 2022.

In South America, **Chile** (fourth exporter in the world) has experienced a decrease of 4% in volume of wine exported compared to 2021 (**8.3 mhl**) and a 9% increase in value (**1.8 bn EUR**).

Among the largest exporters, the country that marked the largest decrease in volume in relative terms is by far **Argentina**: total wine exports went from 3.3 mhl in 2021 to **2.7 mhl** in 2022, recording a -21% decline. This negative growth can be mostly attributed to the negative performances of bottled wine (-7%) and bulk wine (-35%). However, the value of its exports is **752 m EUR** (+7.4% /2021), driven by the rise in average prices of bottled and sparkling wine.

In **Australia**, after a difficult year 2021 owing to the significant rise in Chinese tariffs that lead to a -17% in volume and -24% in value, wine trade has slightly increased in 2022 in both volume (**6.4 mhl**, +1.3% / 2021) and value (**1.4 bn EUR**, +2% / 2021).

Compared to 2021, **New Zealand** registers in 2022 a larger exported volume with **3.0 mhl** (+3.8%) and a sharp rise in value that reached **1.3 bn EUR** (+16% / 2021). In this very positive year New Zealand records a rise in exports in all categories in both volume and value.

South African wine export volume in 2022 has decreased compared to 2021 by 8.7% reaching **4.4 mhl** and increased in value by 4% at **660 m EUR**. All categories saw an increase in value except BiB that lost 1% with respect to the previous year.

In 2022 the **USA** have exported **2.8 mhl**, a decrease of 14.7% compared to 2021, while export value (**1.4 bn EUR**) has increased by 11.8%. The rise in value was mainly driven by a rise in prices of bottled wine (which alone represents 52% of USA wine exports). It is also worth noting the sharp decline in bulk wine exports that record -27% in volume and -14% in value. The neighbouring country of the USA, **Canada**, is the 12th larger exporter in the world by volume in 2022 with **2.1 mhl** (+2.4% / 2021). It should be noted that 99% of its exports are bulk wine, which explains the relatively low value of its exports that in 2022 reached **81 m EUR** (+21% / 2021).

Figure 11 • Main wine exporters[9]

	Volume (mhl)		Value (mEUR)		Type	Vertical Structure in 2022		Variation 2022/2021	
	2021	2022	2021	2022		volume	value	volume	value
Italy	22.0	21.9	7 116	7 834	Bottled (< 2 l)	57%	67%	-3%	7%
					Sparkling	24%	28%	6%	19%
					BiB	2%	1%	-3%	6%
	variation of -0.6%		variation of 10.1%		Bulk (> 10 l)	17%	4%	0%	13%
Spain	23.6	21.2	2 895	2 984	Bottled (< 2 l)	34%	63%	-10%	0%
					Sparkling	8%	17%	2%	5%
					BiB	3%	2%	10%	13%
	variation of -10.2%		variation of 3.1%		Bulk (> 10 l)	55%	18%	-11%	11%
France	14.6	14.0	11 074	12 279	Bottled (< 2 l)	72%	60%	-2%	8%
					Sparkling	17%	38%	5%	19%
					BiB	3%	1%	-11%	1%
	variation of -4.5%		variation of 10.9%		Bulk (> 10 l)	8%	2%	-29%	-17%
Chile	8.7	8.3	1 664	1 818	Bottled (< 2 l)	58%	82%	-1%	10%
					Sparkling	0%	1%	9%	21%
					BiB	2%	2%	-12%	-8%
	variation of -4.0%		variation of 9.3%		Bulk (> 10 l)	39%	16%	-8%	8%
Australia	6.3	6.4	1 352	1 381	Bottled (< 2 l)	35%	72%	-8%	2%
					Sparkling	2%	4%	5%	20%
					BiB	5%	2%	14%	12%
	variation of 1.3%		variation of 2.2%		Bulk (> 10 l)	58%	22%	7%	-2%
South Africa	4.8	4.4	634	660	Bottled (< 2 l)	36%	67%	-17%	4%
					Sparkling	1%	4%	-22%	4%
					BiB	7%	6%	-8%	-1%
	variation of -8.7%		variation of 4.0%		Bulk (> 10 l)	56%	23%	-2%	4%
Germany	3.7	3.5	1 000	1 036	Bottled (< 2 l)	73%	78%	-7%	3%
					Sparkling	10%	13%	2%	13%
					BiB	13%	7%	-19%	-11%
	variation of -5.9%		variation of 3.6%		Bulk (> 10 l)	5%	2%	74%	46%
Portugal	3.3	3.3	927	940	Bottled (< 2 l)	76%	90%	-5%	-1%
					Sparkling	1%	1%	15%	20%
					BiB	11%	8%	2%	8%
	variation of -0.4%		variation of 1.3%		Bulk (> 10 l)	12%	4%	32%	53%
USA	3.3	2.8	1 245	1392	Bottled (< 2 l)	52%	84%	-2%	16%
					Sparkling	1%	2%	-13%	-10%
					BiB	3%	3%	-3%	65%
	variation of -14.7%		variation of 11.8%		Bulk (> 10 l)	43%	11%	-27%	-14%
New Zealand	2.8	3.0	1 165	1 349	Bottled (< 2 l)	57%	73%	5%	14%
					Sparkling	1%	1%	43%	38%
					BiB	1%	1%	51%	73%
	variation of 3.8%		variation of 15.8%		Bulk (> 10 l)	41%	25%	7%	20%
Argentina	3.3	2.7	700	752	Bottled (< 2 l)	76%	92%	-7%	8%
					Sparkling	1%	2%	15%	43%
					BiB	0%	0%	-47%	-29%
	variation of -20.5%		variation of 7.4%		Bulk (> 10 l)	23%	6%	-35%	-10%
Canada	2.1	2.1	67	81	Bottled (< 2 l)	0%	30%	14%	28%
					Sparkling	0%	2%	-1%	18%
					BiB	0%	1%	3%	10%
	variation of 2.4%		variation of 21.0%		Bulk (> 10 l)	99%	67%	2%	19%

Sources: OIV, GTA

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[9] Countries with wine exports equal to or above 2 mhl in 2022.

Main wine importers

In 2022, the USA, Germany and the UK maintained the top three positions in terms of volumes of wine imported. With 41 mhl, together they account for 38% of the world total. In terms of value this is equivalent to 13.1 bn EUR, representing 39% of the world total.

The largest importer by volume in 2022 is the **USA** with **14.4 mhl** (+3% compared to 2021). The USA ranks first also in terms of value, with 2022 wine imports worth **7.0 bn EUR** (+17% / 2021). This growth in value is driven by all categories with the only exception of BiB; sparkling wine is the imported product that increased the most its value from 2021, with a 20% rise. In terms of volume, it is bulk wine that increased the most, with a +10% compared to 2021.

The second largest importer, **Germany**, has decreased its wine imports in both volume and value in 2022. With a decline of 9.3% in volume, Germany's wine imports amount to **13.4 mhl**, which are worth **2.7 bn EUR** (-4% / 2021). This decline is mainly driven by imports of bottled wine that decreased both in volume (-8%) and in value (-9%) with respect to 2021.

The **UK**, with a volume of **13.0 mhl**, stands at the 3rd position in 2022 (-2% / 2021). In terms of value, UK imports have significantly increased by 22.1% reaching **4.8 bn EUR**. This exceptional growth comes from all categories, but it is worth noting the increase in value of sparkling wine that recorded a +41% over 2021.

Looking at other major importers within the EU, **France**, with **6.1 mhl**, has increased by 3.4% in import volumes between 2022 and 2021, while in value it has increased by a remarkable +20%, reaching **988 m EUR**. Bulk wine, which represents the largest share (75%) of the volumes imported in 2022, has increased by 4% in volume and 30% in value.

Netherlands, with a decrease of 6% in its import volume compared to 2021, reaches **4.6 mhl** in 2022, while it has seen a shoot up of 5% in value, at **1.5 bn EUR**. Both bottled and sparkling wine, which together represent 96% of the total value of Dutch wine imports, increased by 5% over 2022.

The fifth largest importer in volume is **Canada**. In 2022 Canadian imports are at **4.2 mhl** (-0.3% / 2021) in volume, and increased by 14% in value, reaching **2.2 bn EUR**. Sparkling wine had the highest growth rate in 2022, with +11% in volume and +21% in value, followed by bottled wine (+2% in volume and +14% in value).

Russia has imported **3.9 mhl** in volume in 2022, accounting for an increase of 5% with respect to 2021, while data on values and breakdown of volume and value by product type have not been published yet.

Belgium, at **3.3 mhl** in volume worth **1.3 bn EUR**, has seen in 2022 a decrease in volume (-4%) and an increase in value (+3%). A similar behaviour has been observed across all categories with the exception of BiB that did not increase in value with respect to 2021.

In 2022, **Portugal** imported a volume of **2.8 mhl** of wine (-4% / 2021), with a valuation of **188 m EUR** (+12% / 2021). Bulk wine represented 74% of the total 2022 imports.

Among the main wine importing countries, **Italy**, with **2.2 mhl** is the country that recorded the largest decrease in volume (-29% / 2021), mainly caused by a fall in the demand of bulk wine (-28%) that represents 85% of Italian wine imports. In terms of value, however, the spike in sparkling wine imports value (+36%) lead to an overall increase of total imports value by 23% compared to 2021, reaching **500 m EUR**.

Sweden has slightly increased its wine imports in 2022 (+0.5%), recording a level of **2.1 mhl** in volume and **778 m EUR** in value (+4% / 2021). Sweden is one of the largest importers of BiB in the world: it accounts for 27% of total imported volume and 14% of value.

Largest Asian wine importers are China and Japan. In 2022, **China** imports **3.4 mhl** (-21% / 2021) worth **1.4 bn EUR** (-4% / 2021). A decrease in volumes imported was recorded in the two main categories of wine imported in China: bulk wine (-12%) and bottled wine (-24%), which together account for 97% of volumes and 93% of value in 2022.

Japan increases its wine imports in 2022 both in volume (**2.7 mhl**, +9% / 2021) and in value (**1.8 bn EUR**, +23% / 2021). Sparkling wine, which represents 39% of Japan's import value, has increased by 15% in volume and 26% in value in 2022.

Figure 12 • Main wine importers[10]

	Volume (mhl)		Value (mEUR)		Type	Vertical Structure in 2022		Variation 2022/2021	
	2021	2022	2021	2022		volume	value	volume	value
USA	13.9	14.4	5 975	6 996	Bottled (< 2 l)	51%	67%	-1%	16%
					Sparkling	14%	27%	5%	20%
					BiB	1%	0%	-19%	-3%
	variation of 3.3%		variation of 17.1%		Bulk (> 10 l)	34%	6%	10%	19%
Germany	14.8	13.4	2 859	2 745	Bottled (< 2 l)	39%	63%	-8%	-9%
					Sparkling	5%	18%	-7%	6%
					BiB	2%	2%	36%	23%
	variation of -9.3%		variation of -4.0%		Bulk (> 10 l)	54%	17%	-10%	3%
UK	13.2	13.0	3 950	4 821	Bottled (< 2 l)	49%	61%	-6%	17%
					Sparkling	13%	25%	0%	41%
					BiB	2%	1%	157%	92%
	variation of -1.6%		variation of 22.1%		Bulk (> 10 l)	37%	13%	2%	12%
France	5.9	6.1	822	988	Bottled (< 2 l)	16%	59%	0%	18%
					Sparkling	6%	13%	5%	15%
					BiB	2%	2%	1%	12%
	variation of 3.4%		variation of 20.2%		Bulk (> 10 l)	75%	26%	4%	30%
Netherlands	4.9	4.6	1 441	1 507	Bottled (< 2 l)	n/a	84%	n/a	5%
					Sparkling	n/a	12%	n/a	5%
					BiB	n/a	2%	n/a	32%
	variation of -6.2%		variation of 4.6%		Bulk (> 10 l)	n/a	1%	n/a	-38%
Canada	4.2	4.2	1 905	2 167	Bottled (< 2 l)	67%	84%	2%	14%
					Sparkling	6%	11%	11%	21%
					BiB	2%	1%	-18%	-6%
	variation of -0.3%		variation of 13.7%		Bulk (> 10 l)	25%	3%	-6%	4%
Russia	3.7	3.9	-	-	Bottled (< 2 l)	n/a	n/a	n/a	n/a
					Sparkling	n/a	n/a	n/a	n/a
					BiB	n/a	n/a	n/a	n/a
	variation of 4.8%				Bulk (> 10 l)	n/a	n/a	n/a	n/a
China	4.2	3.4	1 431	1 369	Bottled (< 2 l)	65%	85%	-24%	-5%
					Sparkling	2%	6%	-27%	-14%
					BiB	1%	1%	-23%	1%
	variation of -20.6%		variation of -4.3%		Bulk (> 10 l)	32%	8%	-12%	19%
Belgium	3.5	3.3	1 258	1 291	Bottled (< 2 l)	59%	64%	-1%	2%
					Sparkling	19%	29%	-5%	5%
					BiB	7%	3%	-13%	-8%
	variation of -4.4%		variation of 2.6%		Bulk (> 10 l)	15%	6%	-11%	3%
Portugal	3.0	2.8	169	188	Bottled (< 2 l)	21%	30%	-6%	8%
					Sparkling	2%	17%	5%	22%
					BiB	3%	2%	36%	61%
	variation of -4.4%		variation of 11.7%		Bulk (> 10 l)	74%	51%	-6%	10%
Japan	2.4	2.7	1 441	1 770	Bottled (< 2 l)	62%	57%	6%	20%
					Sparkling	17%	39%	15%	26%
					BiB	6%	2%	20%	30%
	variation of 8.9%		variation of 22.9%		Bulk (> 10 l)	15%	2%	11%	22%
Italy	3.1	2.2	408	500	Bottled (< 2 l)	9%	20%	-18%	9%
					Sparkling	6%	63%	0%	36%
					BiB	1%	0%	137%	44%
	variation of -28.8%		variation of 22.6%		Bulk (> 10 l)	85%	17%	-28%	1%
Sweden	2.1	2.1	750	778	Bottled (< 2 l)	48%	59%	2%	6%
					Sparkling	13%	21%	0%	0%
					BiB	27%	14%	3%	8%
	variation of 0.5%		variation of 3.7%		Bulk (> 10 l)	12%	6%	-11%	0%

Sources: OIV, GTA

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[10] Countries with wine imports equal to or above 2 mhl in 2022.

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