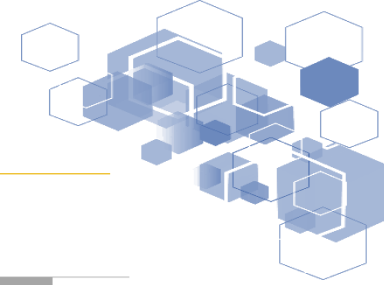
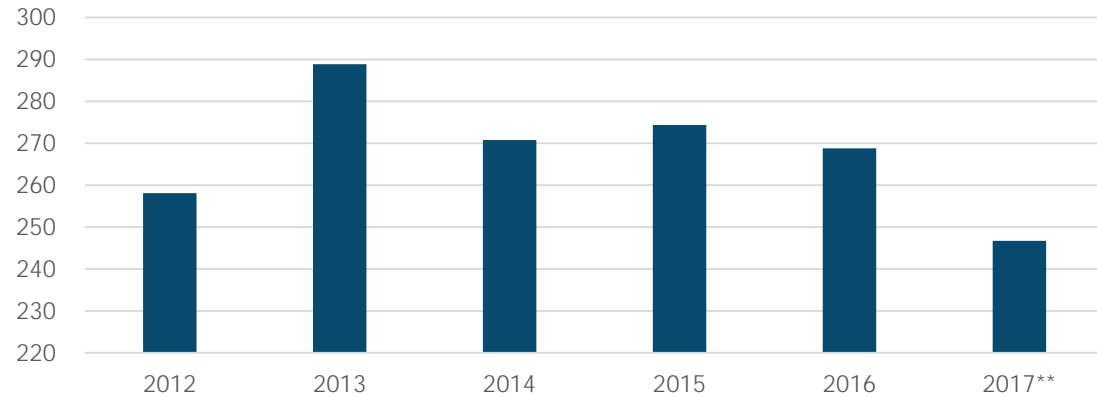


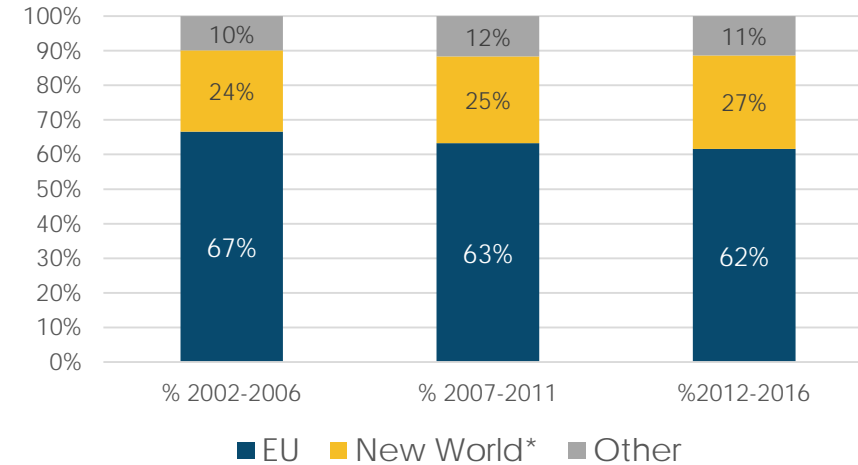
# GLOBAL WINE PRODUCTION



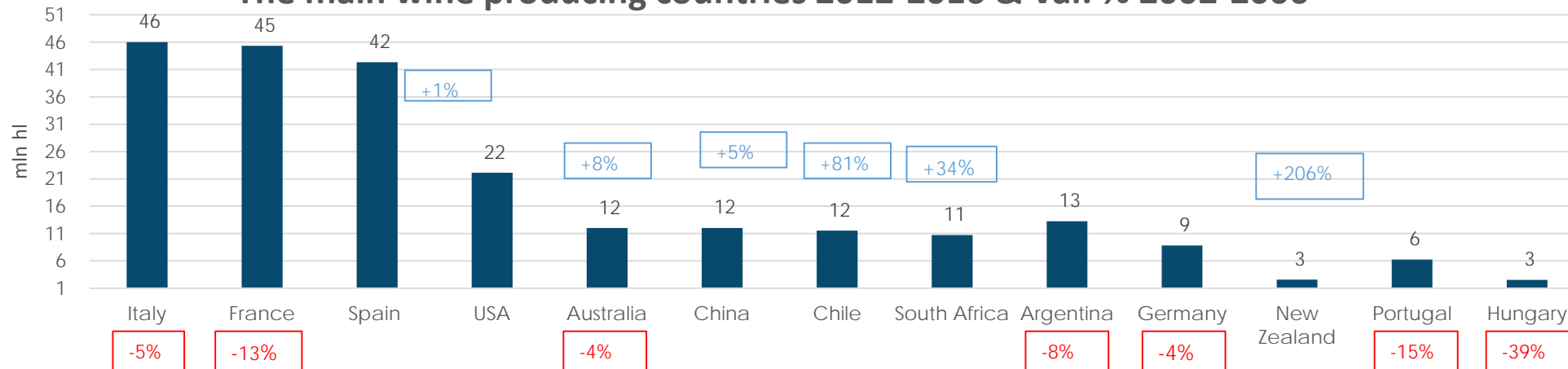
The world's wine production (millions hl)



Share of the global production

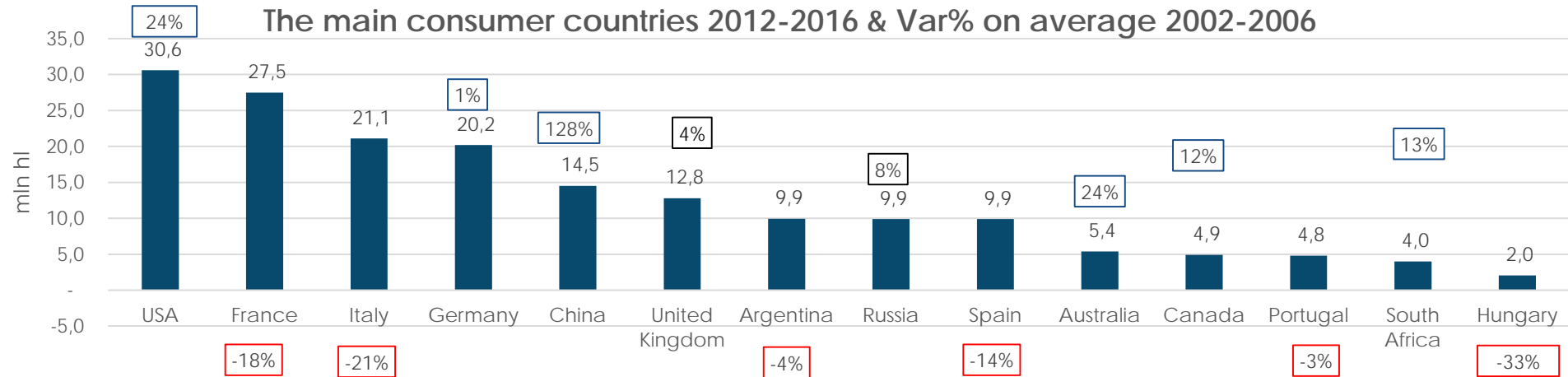
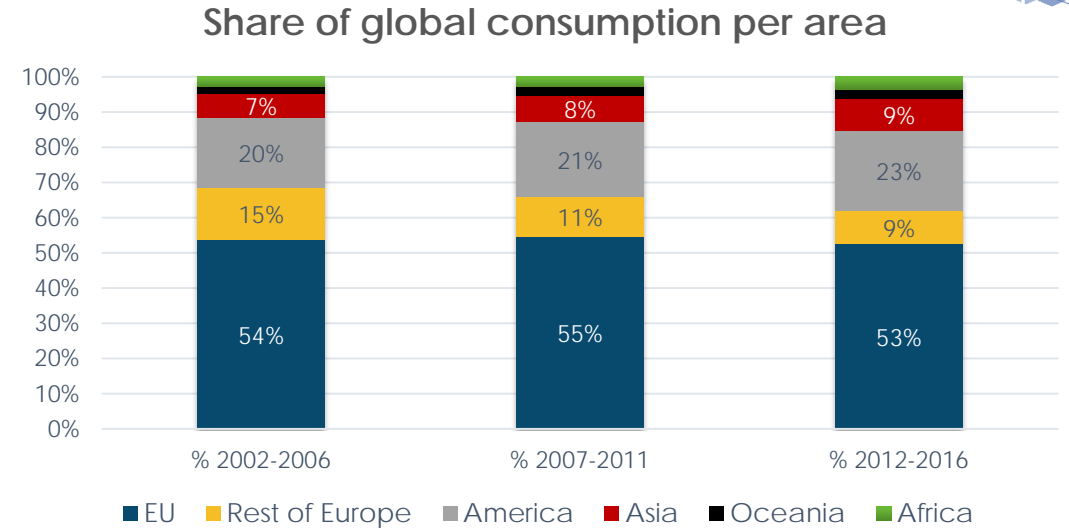
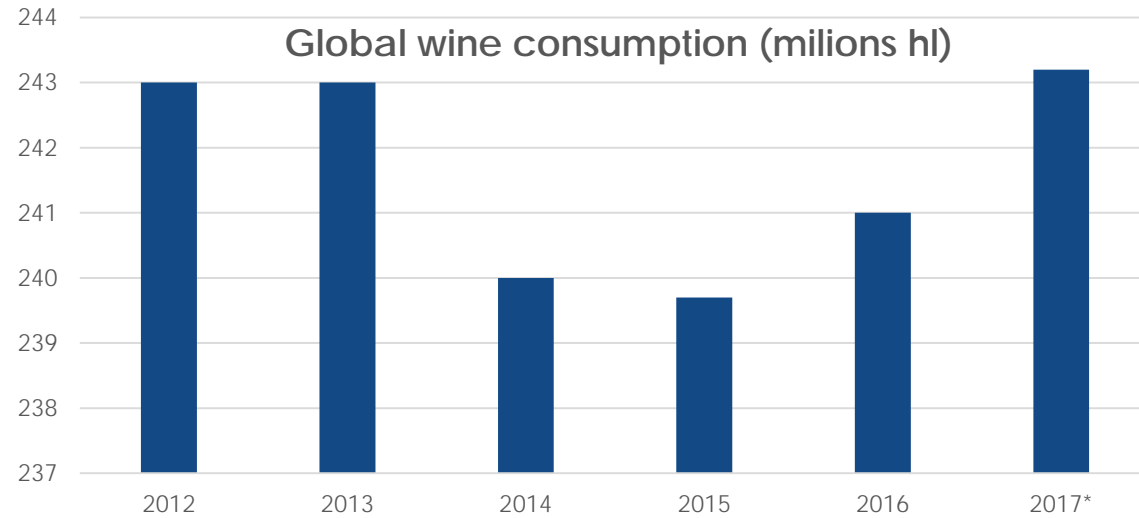


The main wine producing countries 2012-2016 & Var. % 2002-2006



Source: ISMEA based on OIV; \*United States, Argentina, Australia, Chile, South Africa, New Zealand; \*\*Estimate October 2017

# GLOBAL WINE CONSUMPTION

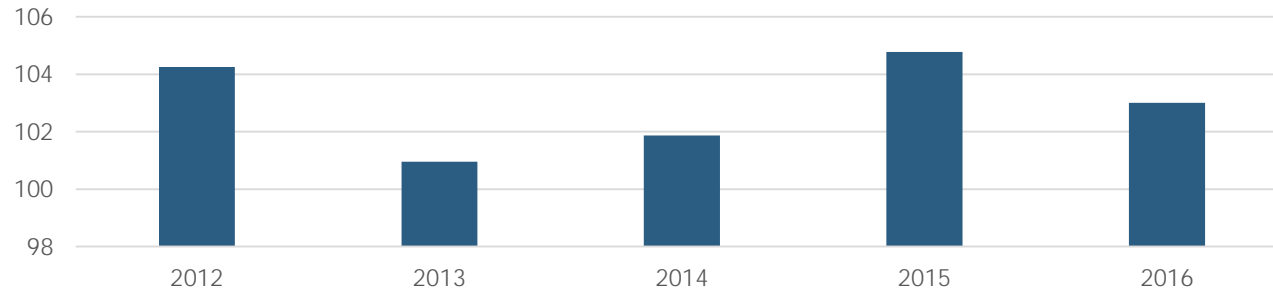


Source: ISMEA based on OIV; \*Estimate October 2017

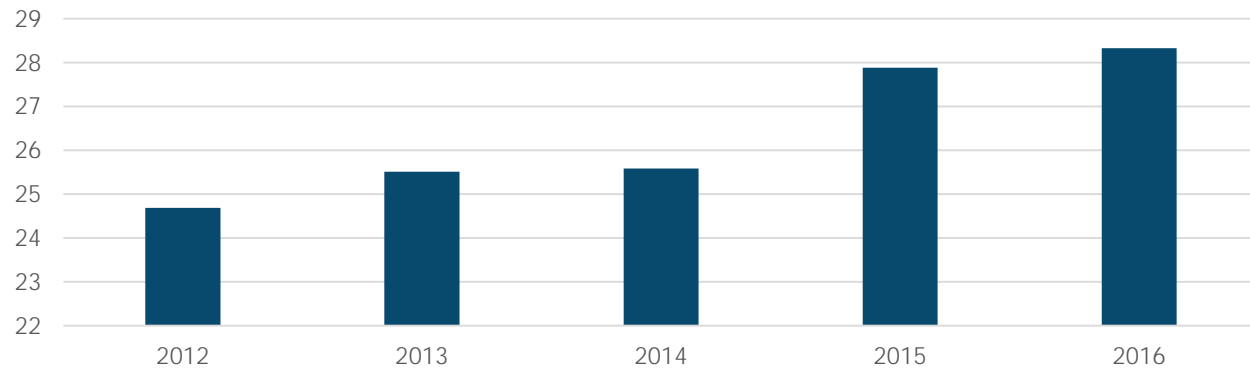
# GLOBAL TRADE PATTERNS



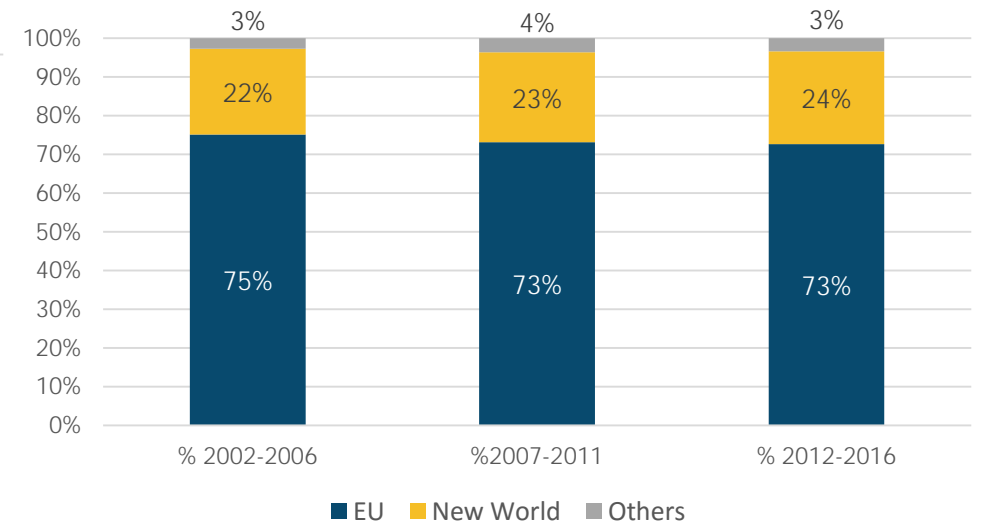
Global wine exports (milions hl)



Global wine exports (billions €)



Share of exports value

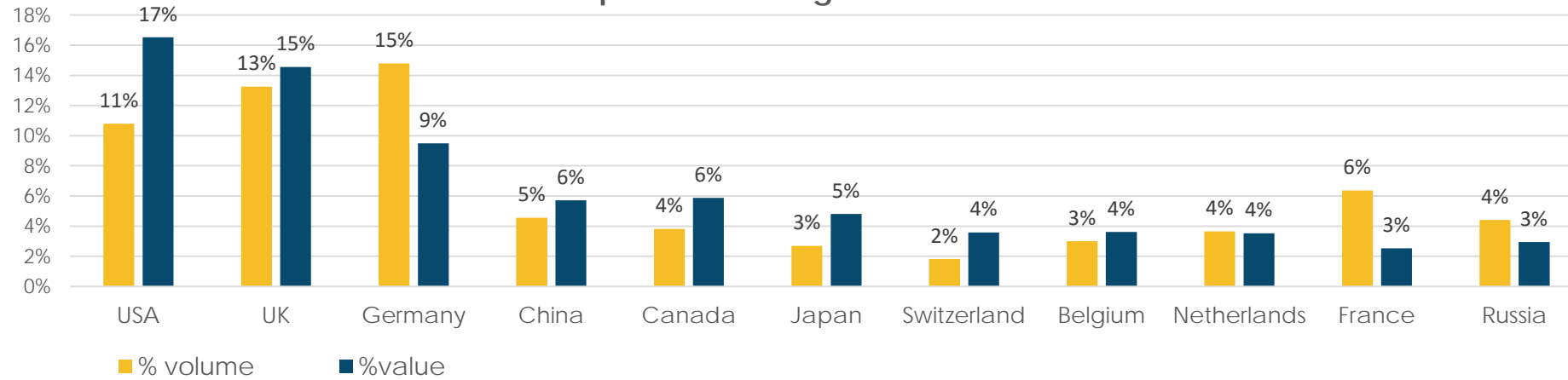


Source: ISMEA based on IHS-GTA

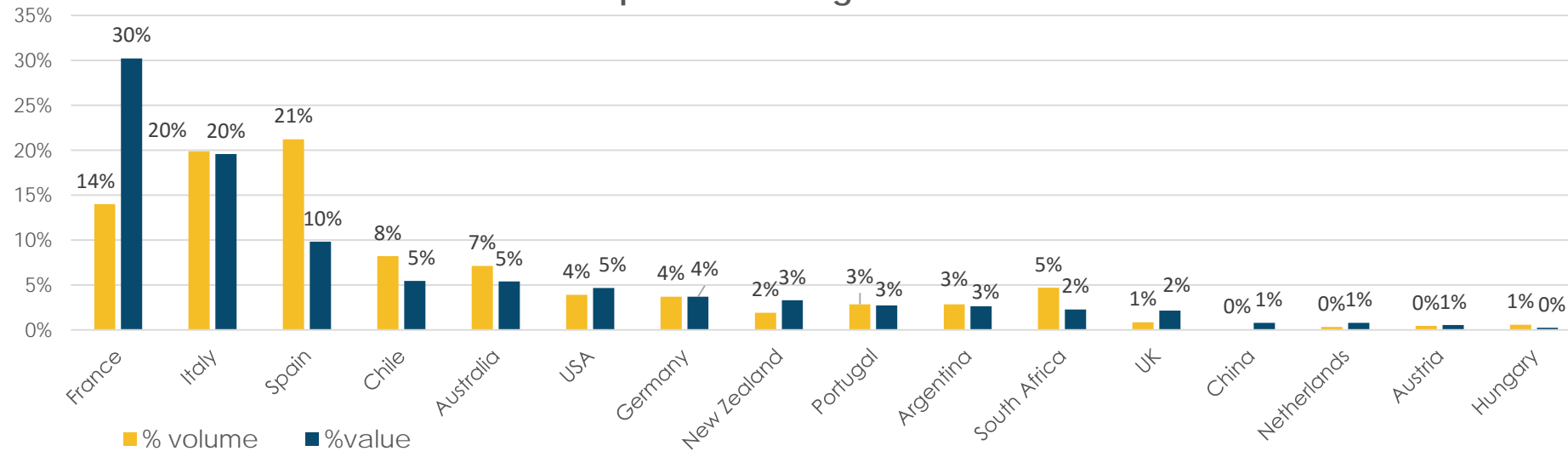
# LEADING COUNTRIES IN THE WINE TRADE



Importers: average 2012-2016



Exporters: average 2012-2016



Source: ISMEA based on dati IHS-GTA

## EXPORT PRICES



Price (euro/liter)	Average price 2011-2013	Average price 2014-2016	Var. %
France	5,22	5,68	9,0%
Italy	2,20	2,64	20,0%
Spain	1,19	1,13	-5,0%
Chile	1,77	1,82	3,0%
Argentina	1,98	2,65	33,8%
South Africa	1,31	1,25	-4,3%
Portugal	2,20	2,60	18,4%
Germany	2,46	2,58	4,9%
Hungary	1,11	1,15	3,9%
Australia	1,98	1,91	-3,5%
<i>EU as a whole</i>	<i>2,61</i>	<i>2,79</i>	<i>6,9%</i>

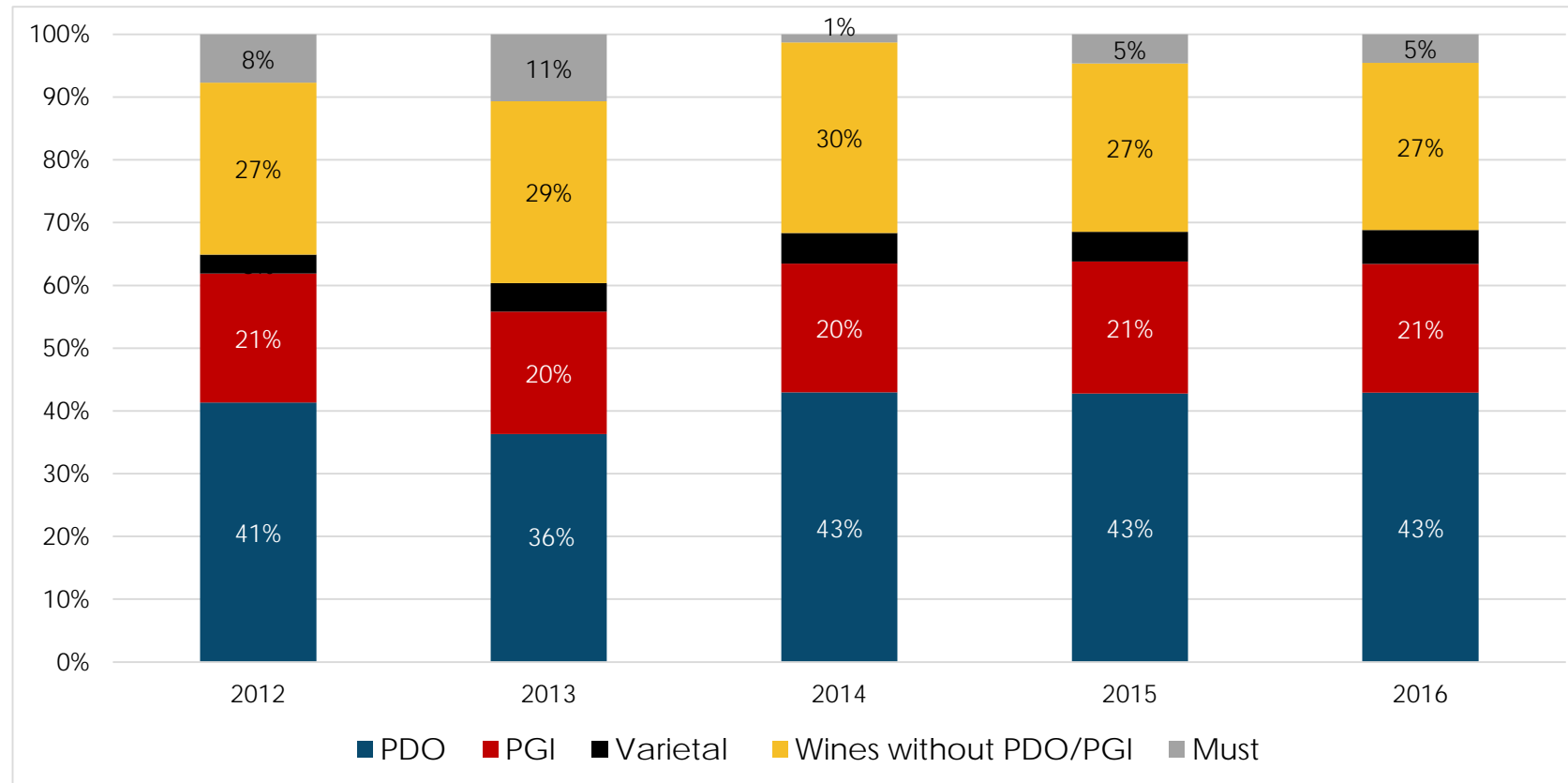
Source: ISMEA based on IHS-GTA



# WINE PRODUCTION PER CATEGORY



Evolution on the weight of GI wines in the total EU-28 production (%)



Source: ISMEA based on European Commission

# WEIGHT OF PDO & PGI PRODUCTION IN THE MAIN EU COUNTRIES



% weight of PDO and PGI production potential in total wine in 2016

	<i>Share % PDO</i>	<i>Share % PGI</i>	<i>Tot. share % GI</i>	<i>Share % other wines</i>	<i>Total</i>
France	48,4%	28,3%	76,6%	23,4%	100,0%
Italy	36,3%	27,0%	63,3%	36,7%	100,0%
Germany	90,7%	0,0%	90,7%	9,3%	100,0%
Spain	35,9%	9,6%	45,5%	54,5%	100,0%
Portugal	50,3%	25,7%	76,0%	24,0%	100,0%
Hungary	24,3%	31,9%	56,2%	43,8%	100,0%
<b>EU-28</b>	<b>42,9%</b>	<b>20,5%</b>	<b>63,4%</b>	<b>36,6%</b>	<b>100,0%</b>

Fonte: ISMEA su dati COMMISSIONE UE- Dichiarazioni di produzione

# PERFORMANCE OF THE WINE SECTOR IN THE EU AGRI-FOOD SECTOR: BASIC PRICE



## Basic price EU-28

EU 28	Share % 2011	Share % 2012	Share % 2015	Millions € 2015	AAGR* 2011/2015
<b>TOTAL AGRICULTURE</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>414.044</b>	<b>-0,5%</b>
- CROPS	52,8%	51,9%	51,7%	214.098	-0,9%
Wine (includes PGI, table and varietals wines)	4,6%	4,5%	5,4%	22.364	3,7%
<b>PDO wine*</b>	<b>3,5%</b>	<b>3,3%</b>	<b>4,3%</b>	<b>17.853</b>	<b>5,3%</b>
Fruits, vegetables and potatoes	14,5%	14,1%	15,9%	65.994	2,1%
Sugar beet	1,0%	4,7%	0,8%	3.160	-8,1%
- LIVESTOCK	39,2%	40,1%	39,7%	164.365	-0,4%
Meat	23,2%	24,2%	24,1%	99.747	0,2%
Livestock products	16,0%	15,9%	15,6%	64.617	-1,4%
Milk	13,4%	12,6%	12,6%	52.196	-2,2%

\* average annual growth rate

Source: ISMEA based on EUROSTAT; \*the indicator «production at basic price» considers only PDO wines & does not distinguish PGI wines from table wines



# PERFORMANCE OF THE WINE SECTOR IN THE EU AGRI-FOOD SECTOR: EXPORTS



## EU-28 wine exports to third countries in value

EU 28	Share % 2012	Share % 2015	Share % 2016	Milions € 2016	AAGR* 2012/2016
<b>Total agri-food</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>130.243</b>	<b>5,1%</b>
Beverages & alcoholic beverages	22,4%	21,7%	21,4%	27.899	4,4%
- Wine (includes table and varietal wines)	8,0%	7,7%	7,8%	10.113	4,1%
<b>- - GI wine</b>	<b>7,0%</b>	<b>6,9%</b>	<b>6,9%</b>	<b>8.987</b>	<b>4,2%</b>
Meat	7,4%	6,7%	7,8%	10.170	4,0%
Milk and milk products	7,8%	7,3%	7,0%	9.092	2,3%
Fresh and processed vegetables	4,8%	4,7%	5,0%	6.528	5,0%
Fresh and processed fruit	4,8%	4,2%	4,1%	5.288	1,8%
Sugar & sugar confectionary	2,2%	1,7%	1,8%	2.409	1,7%

\* average annual growth rate

Source: ISMEA based on IHS-GTA

# PERFORMANCE OF THE WINE SECTOR IN THE EU AGRI-FOOD SECTOR: IMPORTS



## EU-28 Imports in value from third countries

EU 28	Share % 2012	Share % 2015	Share % 2016	Millions € 2016	AAGR* 2012/2016
<b>Total agri-food</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>132.724</b>	<b>3,6%</b>
Beverages & alcoholic beverages	4,4%	4,6%	4,7%	5.916	3,6%
- Wine (includes table and varietal wines)	2,1%	2,1%	2,1%	2.641	2,5%
- - <b>GI wine</b>	<b>0,1%</b>	<b>0,1%</b>	<b>0,1%</b>	<b>69</b>	<b>-8,5%</b>
Meat	3,5%	3,2%	3,1%	3.940	1,6%
Milk and milk products	0,6%	0,5%	0,6%	583	-2,2%
Fresh and processed vegetables	4,3%	4,1%	4,3%	6.033	4,8%
Fresh and processed fruit	15,1%	15,1%	16,1%	24.055	8,6%
Sugar & sugar confectionary	2,7%	2,4%	2,6%	2.236	-7,1%

\* average annual growth rate

Source: ISMEA based on IHS-GTA

# PERFORMANCE OF THE WINE SECTOR IN THE EU AGRI-FOOD SECTOR: TRADE BALANCE



## EU-28 trade balance with third countries

EU 28	Milions € 2012	Milions € 2016	AAGR* 2012/2016
<b>Total agri-food</b>	<b>-5.567</b>	<b>- 2.481</b>	<b>↑ -20,6%</b>
Beverages & alcoholic beverages	19.624	21.982	<b>↑ 4,6%</b>
- Wine (includes table and varietal wines)	<b>6.368</b>	<b>7.472</b>	<b>↑ 4,7%</b>
- - <i>GI wine</i>	<b>7.735</b>	<b>8.918</b>	<b>↑ 4,4%</b>
Meat	4.548	6.230	<b>↑ 6,0%</b>
Milk and milk products	8.078	8.510	<b>↑ 2,7%</b>
Fresh and processed vegetables	566	495	<b>↓ 7,3%</b>
Fresh and processed fruit	<b>- 12.290</b>	<b>-18.767</b>	<b>↓ 10,9%</b>
Sugar & sugar confectionary	<b>- 383</b>	173	<b>↑</b>

\* average annual growth rate

Source: ISMEA based on IHS-GTA

