



# **Wine Market Observatory**

**Tuesday 9 November 2021**

## **3. Wine market situation - update**



## EU wine and must production - forecast 2021/2022:

### Key facts:

- EU wine production (wine and must) in 2021 (2021/2022 marketing year) would be **147 Mio HI, i.e. -23 Mio HI (-13 %)** compared to the production 2020,
- With an estimated production of 44,5 million HI (-9 %), Italy would remain at the top, followed by Spain (39 million HI -15 %) and France (33,3 million HI -27 %),
- Germany and Portugal would increase their production by + 4 % and + 1 % respectively in 2021,
- Some Member States in Eastern Europe (Czech Republic, Hungary, Romania, Slovakia), although producing smaller volumes, show an upward trend,
- With a relatively small volume, the 2021 harvest would be -11 % lower than the average of the last 5 years, but still higher than the 2017 harvest, the lowest in the last 20 years (2017, with 144 Mio HI, had been a historically low harvest).

EU Wine and Must production - forecast 2021/2022 - all MS - 1000 HI

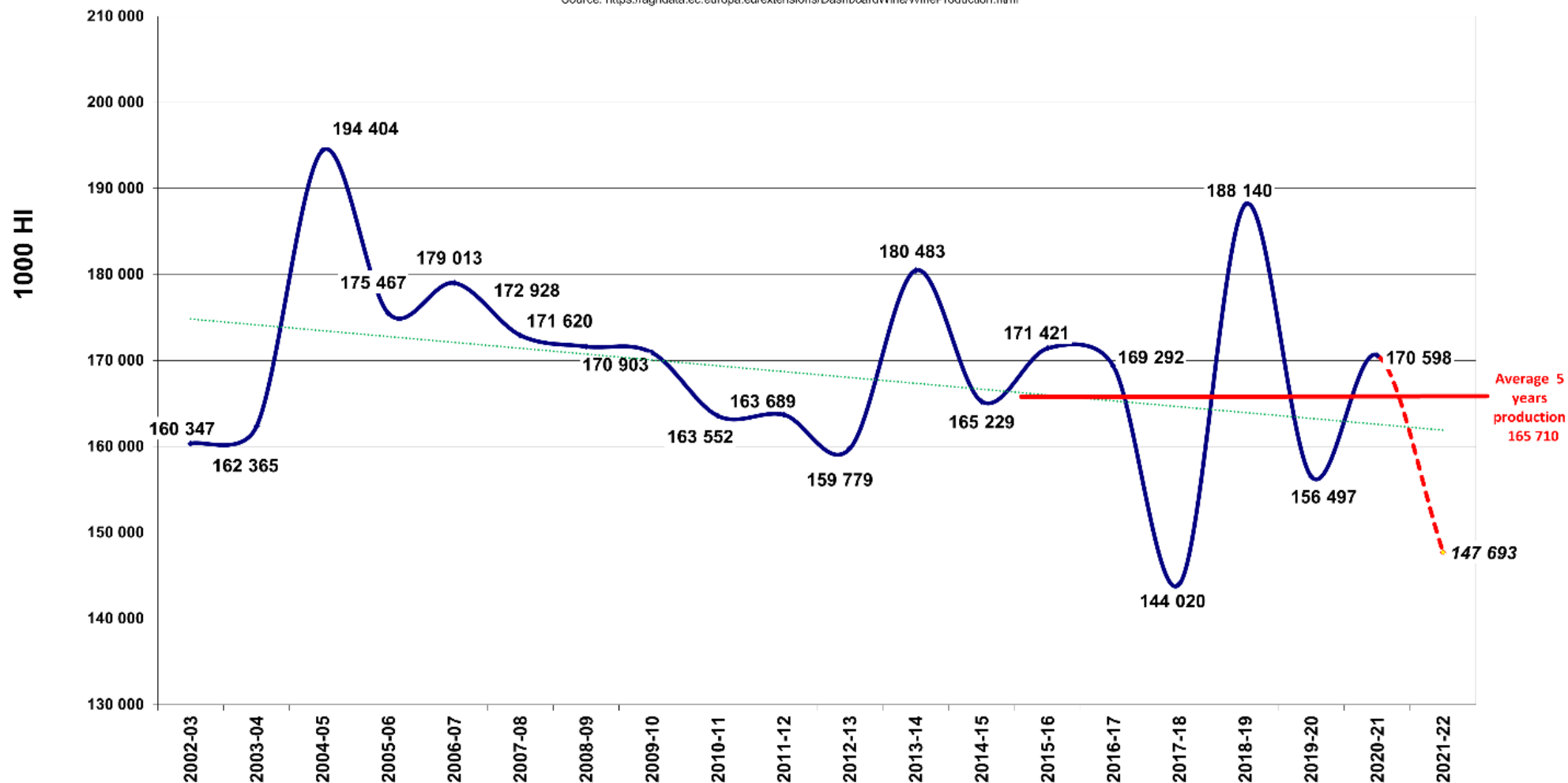
07-10-2021

Member State Isamm Order:	Prod 16/17	Prod 17/18	Prod 18/19	Prod 19/20	Prod 20/21	Forecast 21/22					Forecast Wine 21/22	Forecast Must 21/22	Forecast Wine + Must 21/22	Variation n- 1	% n-1	Average 5 years	Variation 5YA	% 5YA
						P.D.O. wines	P.G.I. wines	Varietal wines without	Wines without PDO/PGI	Other wines								
Belgium											0		0					
Bulgaria	1 245	1 157	1 084	917	823	4	353	245	272	10	884	0	884	61	7%	1 045	-161	-15%
Czechia	631	645	691	492	603	551	39	17	10	1	618	8	626	23	4%	613	13	2%
Denmark											0		0					
Germany	9 013	7 462	10 269	8 218	8 405	8 760	0	0	0	0	8 760	0	8 760	355	4%	8 673	87	1%
Ireland											0		0					
Greece	2 581	2 410	2 235	2 425	2 283	162	400	148	986	0	1 696	14	1 710	-573	-25%	2 387	-676	-28%
Spain	43 360	34 902	49 522	37 289	45 906	13 800	4 400	7 600	9 200	0	35 000	4 000	39 000	-6 906	-15%	42 196	-3 196	-8%
France	45 562	36 783	49 571	42 299	45 785	13 992	8 896	0	1 980	8 459	33 327	0	33 327	-12 458	-27%	44 000	-10 673	-24%
Croatia	613	576	733	525	660	478	0	29	60	2	569	0	569	-91	-14%	621	-53	-8%
Italy	50 920	42 499	54 783	47 546	49 066	19 600	11 582	445	12 918	0	44 545	5	44 550	-4 516	-9%	48 963	-4 413	-9%
Cyprus	81	110	109	100	89	2	21	9	32	1	66	0	66	-23	-26%	98	-32	-33%
Latvia											0		0					
Lithuania											0		0					
Luxembourg	83	81	134	75	97	110	0	0	0	0	110		110	13	14%	94	16	17%
Hungary	2 820	2 876	3 699	2 743	2 913	2 569	542	0	6	0	3 116	0	3 116	203	7%	3 010	106	4%
Malta	14	15				6	4	0	0	0	11	0	11	11		15		
Netherlands	8	6				2	5	0	1	0	7	0	7	7		7		
Austria	1 953	2 487	2 753	2 324	2 398	2 150	40	2	90	30	2 312	1	2 313	-85	-4%	2 383	-70	-3%
Poland						0	0	14	4	2	20	0	20	20				
Portugal	6 022	6 737	6 061	6 527	6 418	3 457	2 380	28	606	0	6 472	0	6 472	53	1%	6 353	119	2%
Romania	3 323	4 346	5 189	3 918	4 032	1 337	407	20	3 493	0	5 257	0	5 257	1 226	30%	4 162	1 096	26%
Slovenia	739	630	889	758	743	389	103	21	36	0	549	0	549	-194	-26%	752	-203	-27%
Slovakia	315	298	389	321	357	295	2	15	32	3	347	0	347	-11	-3%	336	10	3%
Sweden											0		0					
Others:											0		0					
Total	169 283	144 020	188 113	156 476	170 578	67 664	29 172	8 594	29 727	8 509	143 665	4 028	147 693	-22 886	-13%	165 694	-18 002	-11%
Others:	9		27	21	20			Agriculture and Forest										
Total	169 292	144 020	188 140	156 497	170 598	67 664	29 172	8 594	29 727	8 509	143 665	4 028	147 693	-22 886	-13%	165 710	-18 017	-11%

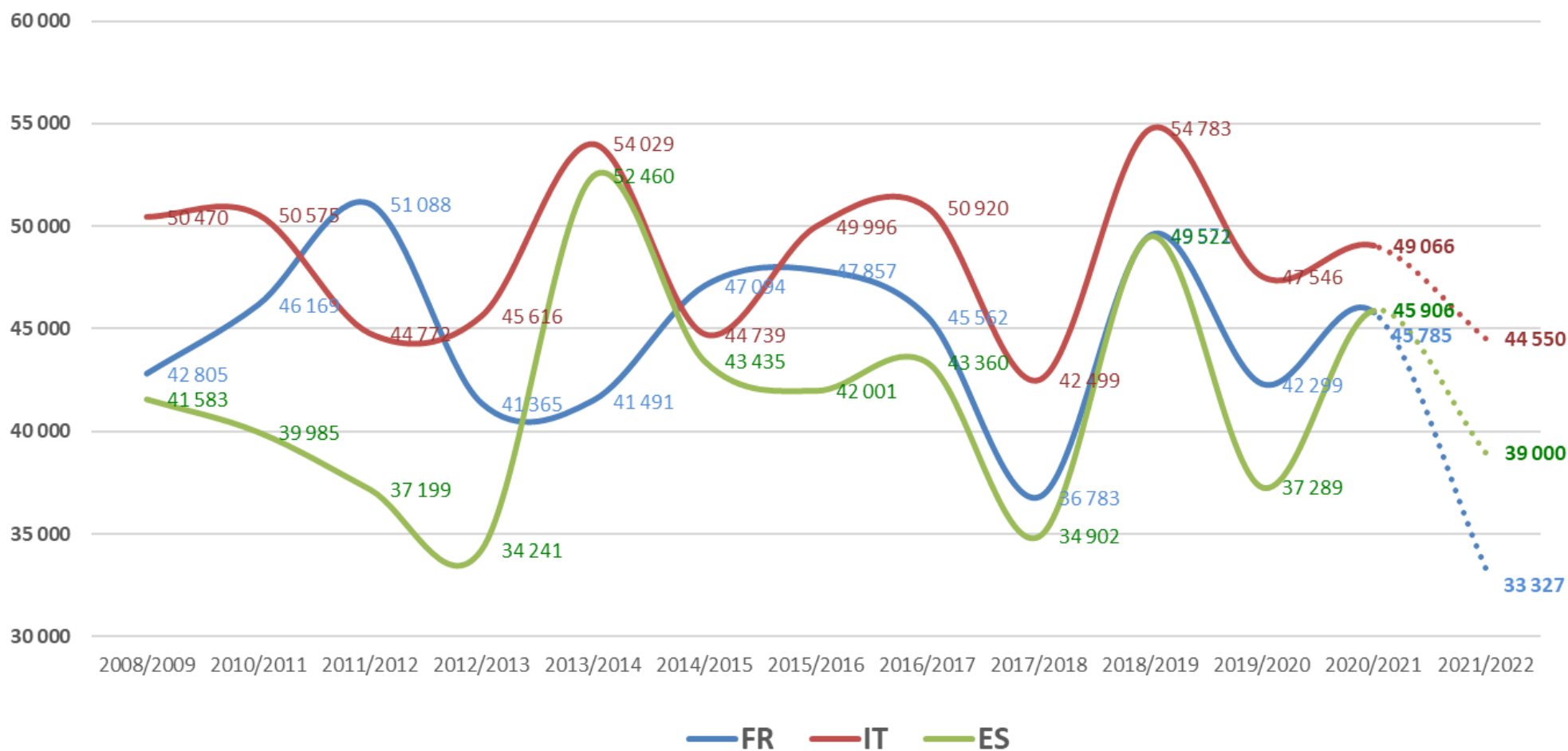
## Evolution EU - 27 Wine and Must Production

Estimation October 2021 - in 1000 HI

Source: <https://agridata.ec.europa.eu/extensions/DashboardWine/WineProduction.html>



## Total wine and must production evolution - FR, IT and ES (in 1000 HI)



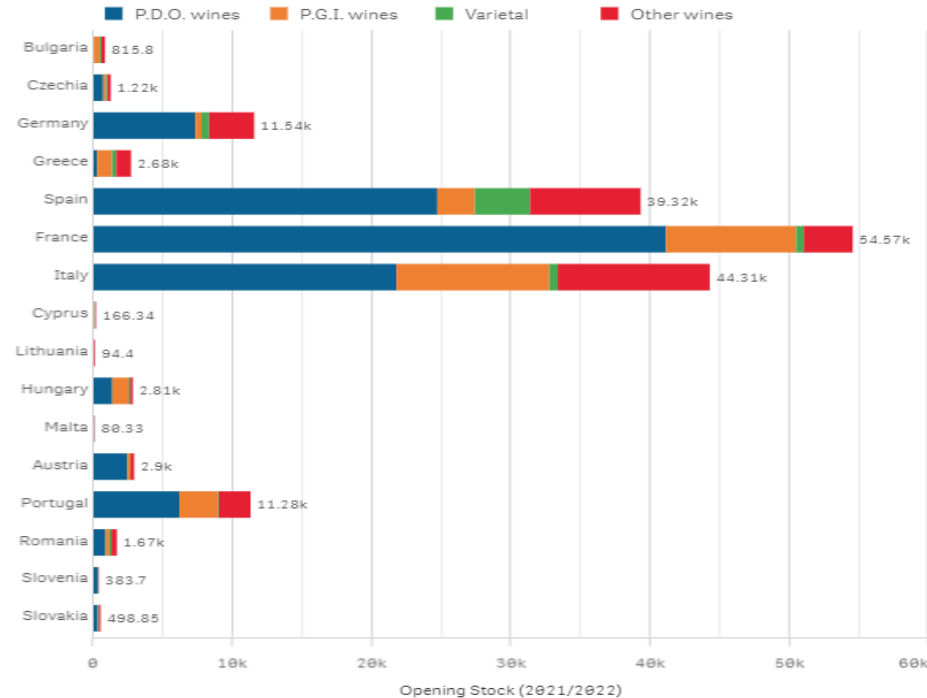
# Opening Stocks 2021/2022: 174 Mio HI

DG AGRI - Wine Production & Opening Stocks
 Results
Area Results
Evolution
Area Evolution
Comparison
Area Comparison
Long Term Evolution
Area Long

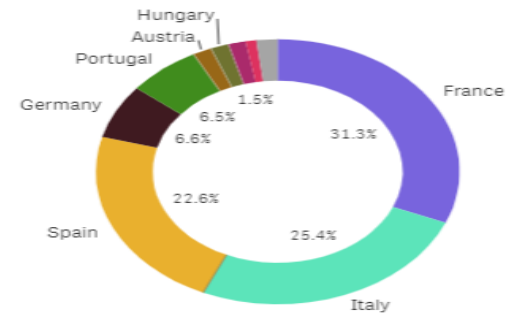
Marketing Year: 
 Member State: 
 Category: 
 Opening Stock: 
 Total: 
 App update: 05/11/2021
 Reset Selections

AI HI
 
 Opening Stock: 
 Total: 
 App update: 05/11/2021
 Reset Selections
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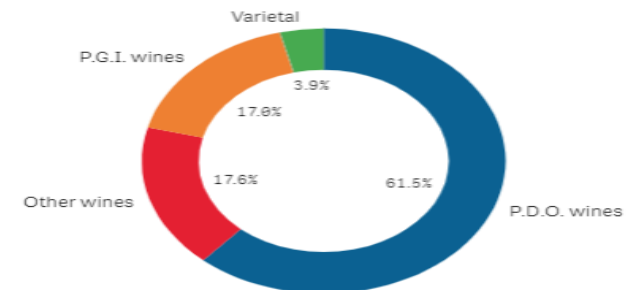
Production by Category and MS



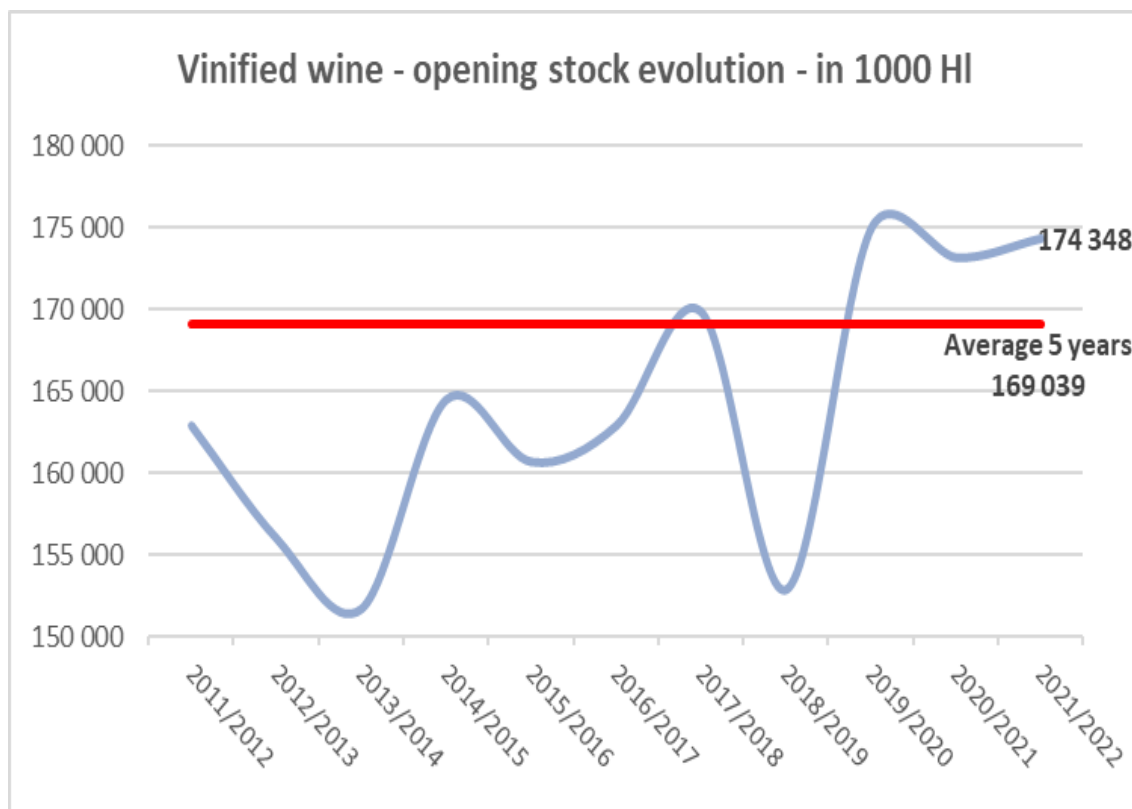
Opening Stock by MS



Opening Stock by Category



## Opening Stocks Evolution



Marketing Year	Total Opening Stock	Variation n-1
2011/2012	162 900	
2012/2013	155 998	-4%
2013/2014	151 678	-3%
2014/2015	164 488	8%
2015/2016	160 676	-2%
2016/2017	162 889	1%
2017/2018	169 849	4%
2018/2019	152 851	-10%
2019/2020	174 971	14%
2020/2021	173 178	-1%
<b>2021/2022</b>	<b>174 348</b>	<b>1%</b>
<b>Average 5 years</b>	<b>169 039</b>	<b>3%</b>



# Exports 2020/2021: historical record: 28,8 Mio Hl: +29% (+6,4 Mio Hl, including 4,1 Mio Hl exported to UK => +10% net)



## Wine Trade Data

[Monthly Trade Data](#)[Annual Trade Data](#)[Trade Flows](#)[Trade Data by Member State](#)[Data Explorer](#)[Commodity Definitions](#)

EU Composition:  Flow:  Measure:

Latest update: 13/10/2021 11:57:24

Product Category:  Product Group:  Member State:  Partner:  Marketing Year:  Month:  [Reset Selections](#) [Download to PDF](#)

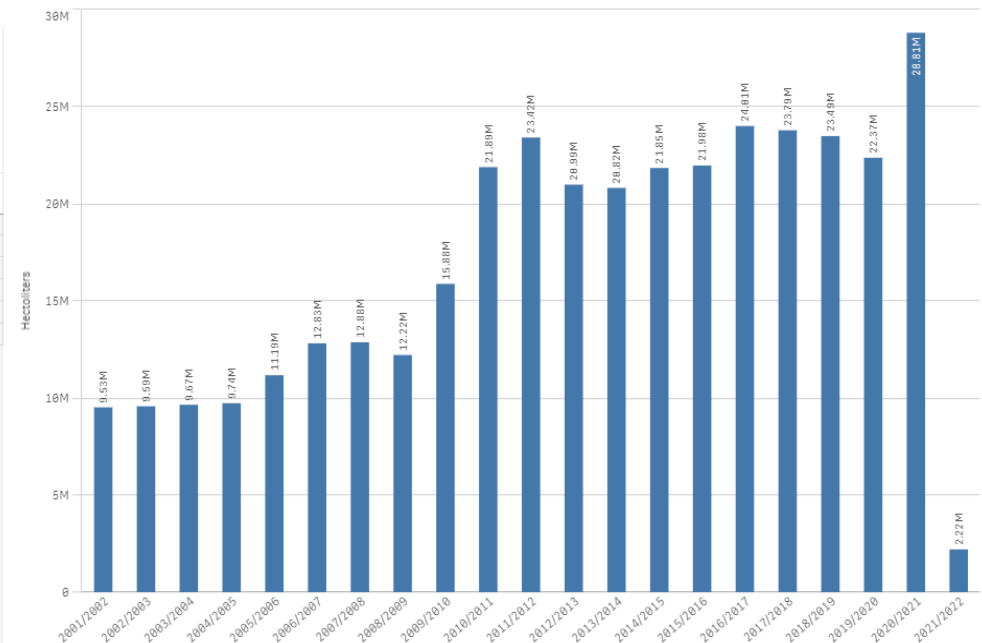
### Annual EU Trade, Quantity in hectoliters

EU, flow: EXPORT, all product categories, all product groups, all partners, all Marketing Years, all months. Rearrange the order of the dimensions (Product Group, Member State, Partner) to change the view.

	2021/2022	2020/2021	2019/2020	2018/2019	2017/2018	2016/2017	2015/2016
Total Product Categories	2 221 273	28 887 045	22 374 745	23 491 767	23 787 843	24 009 785	21 975 520
• PDO Wines	1 165 776	15 439 876	11 476 850	11 776 962	11 602 805	10 941 249	10 022 471
• Other Wines	483 890	5 701 976	5 128 672	5 750 246	5 775 214	6 719 982	6 143 671
• PGI Wines	370 513	5 545 169	4 415 453	4 559 660	5 126 622	5 160 476	4 800 324
• Varietal Wines	181 941	1 827 479	1 099 072	1 159 987	1 084 452	983 789	815 268
• Wine Must	19 153	292 545	254 698	244 912	198 750	204 210	193 786

### Annual EU Trade, Quantity in hectoliters

EU, flow: EXPORT, all product categories, all product groups, all partners, all Marketing Years, all months







# Exports 2020/2021: historical record: 14 Bio€: +28% (+3 Bio€, including 1,7 Bio€ exported to UK => +12% net)



## Wine Trade Data

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EU Composition:  Flow:  Measure:

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Product Category:  Product Group:  Member State:  Partner:  Marketing Year:  Month:  [Reset Selections](#) [Download to PDF](#)

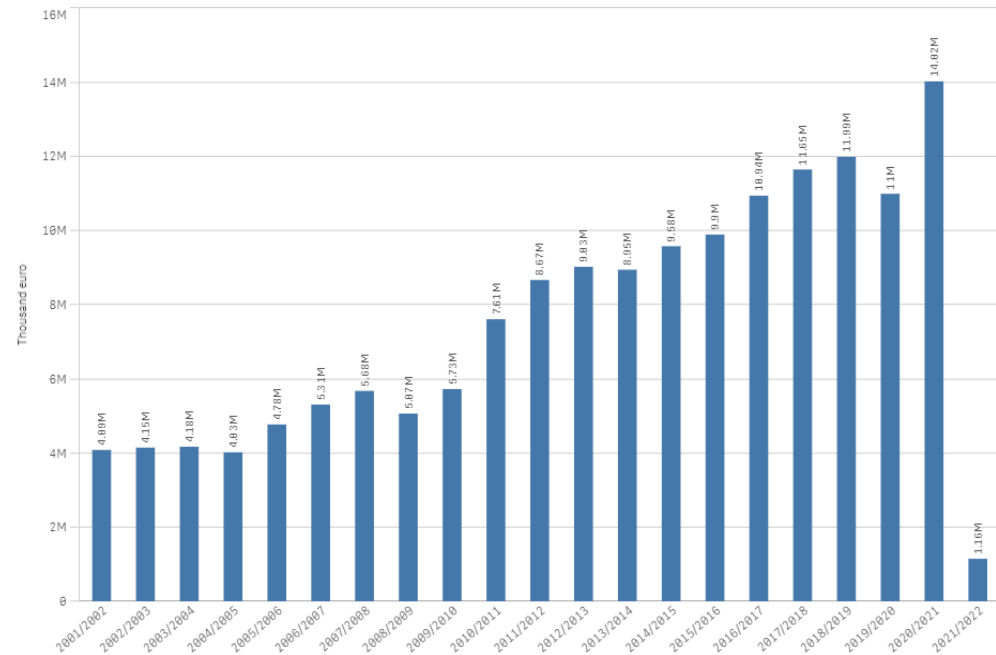
### Annual EU Trade, Value in thousand euro

EU, flow: EXPORT, all product categories, all product groups, all partners, all Marketing Years, all months. Rearrange the order of the dimensions (Product Group, Member State, Partner) to change the view.

	2021/2022	2020/2021	2019/2020	2018/2019	2017/2018	2016/2017	2015/2016
Total Product Categories	1 156 563	14 024 795	10 995 323	11 988 945	11 649 582	10 943 650	9 895 623
• PDO Wines	914 722	10 861 264	8 391 459	9 252 188	8 824 719	8 194 649	7 391 153
• PGI Wines	125 139	1 758 221	1 461 217	1 495 819	1 599 225	1 604 028	1 486 706
• Other Wines	75 809	937 938	828 706	902 315	893 422	863 603	775 830
• Varietal Wines	35 759	402 678	263 818	281 204	274 431	230 433	199 281
• Wine Must	5 135	64 693	50 122	57 419	57 785	50 937	42 653

### Annual EU Trade, Value in thousand euro

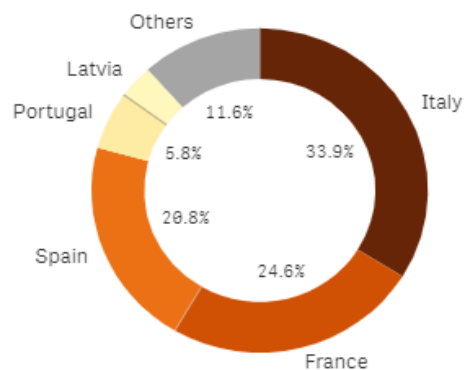
EU, flow: EXPORT, all product categories, all product groups, all partners, all Marketing Years, all months



## Exports 2020/2021 – per MS and partners

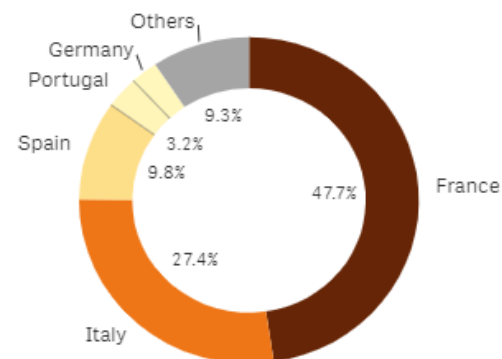
### EU Trade by Member States, Quantity in hectoliters

EU, flow: EXPORT, all product categories, all product groups, all partners, Marketing Year: 2020/2021, all months



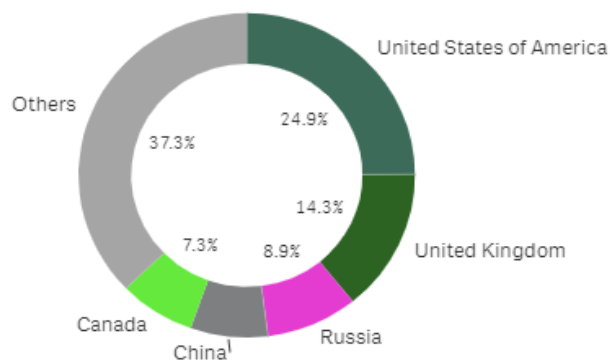
### EU Trade by Member States, Value in thousand euro

EU, flow: EXPORT, all product categories, all product groups, all partners, Marketing Year: 2020/2021, all months



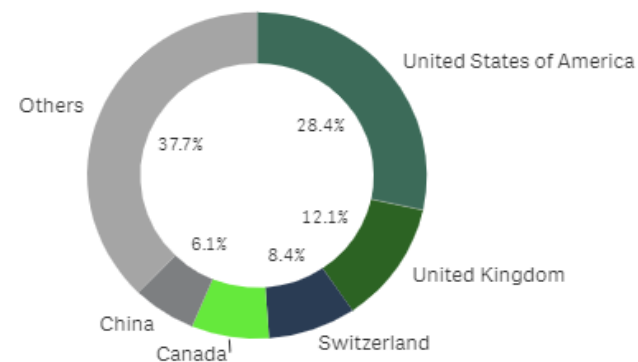
### EU Trade by Partners, Quantity in hectoliters

EU, flow: EXPORT, all product categories, all product groups, all partners, Marketing Year: 2020/2021, all months



### EU Trade by Partners, Value in thousand euro

EU, flow: EXPORT, all product categories, all product groups, all partners, Marketing Year: 2020/2021, all months





# Imports 2020/2021: 7 Mio Hl: -30% (-3 Mio Hl, mainly corresponding to UK share)

EU Composition: 
 Flow: 
 Measure:

Latest update: 13/10/2021 11:57:24

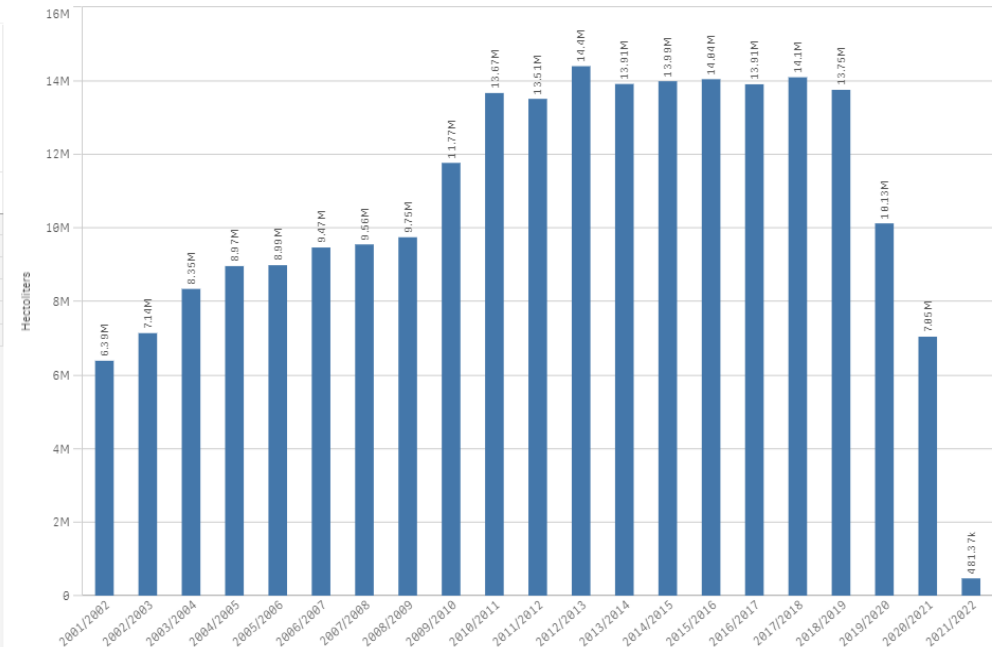
## Annual EU Trade, Quantity in hectoliters

EU, flow: IMPORT, all product categories, all product groups, all partners, all Marketing Years, all months. Rearrange the order of the dimensions (Product Group, Member State, Partner) to change the view.

	2021/2022	2020/2021	2019/2020	2018/2019	2017/2018	2016/2017	2015/2016
<b>Total Product Categories</b>	<b>481 374</b>	<b>7 047 807</b>	<b>10 126 761</b>	<b>13 754 428</b>	<b>14 095 378</b>	<b>13 905 779</b>	<b>14 043 428</b>
• Varietal Wines	264 662	4 199 579	4 647 334	4 395 210	4 480 398	4 303 251	4 336 413
• Other Wines	191 549	2 284 529	4 892 655	8 358 301	8 534 994	8 150 416	8 267 838
• PGI Wines	15 890	374 759	401 593	683 634	740 133	1 004 559	990 253
• PDO Wines	9 223	188 575	182 712	311 060	331 963	444 893	438 628
• Wine Must	50	366	2 468	6 223	7 890	2 659	10 297

## Annual EU Trade, Quantity in hectoliters

EU, flow: IMPORT, all product categories, all product groups, all partners, all Marketing Years, all months





# Imports 2020/2021: 1,7 Bio€: -25% (-578 Mio€, mainly corresponding to UK share)

## Wine Trade Data

[Monthly Trade Data](#)[Annual Trade Data](#)[Trade Flows](#)[Trade Data by Member State](#)[Data Explorer](#)[Commodity Definitions](#)

EU Composition: EU | Flow: **IMPORT** | Measure: **Value**

Latest update: 13/10/2021 11:57:24

Product Category | Product Group | Member State | Partner | Marketing Year | Month | [Reset Selections](#) | [Download to PDF](#)

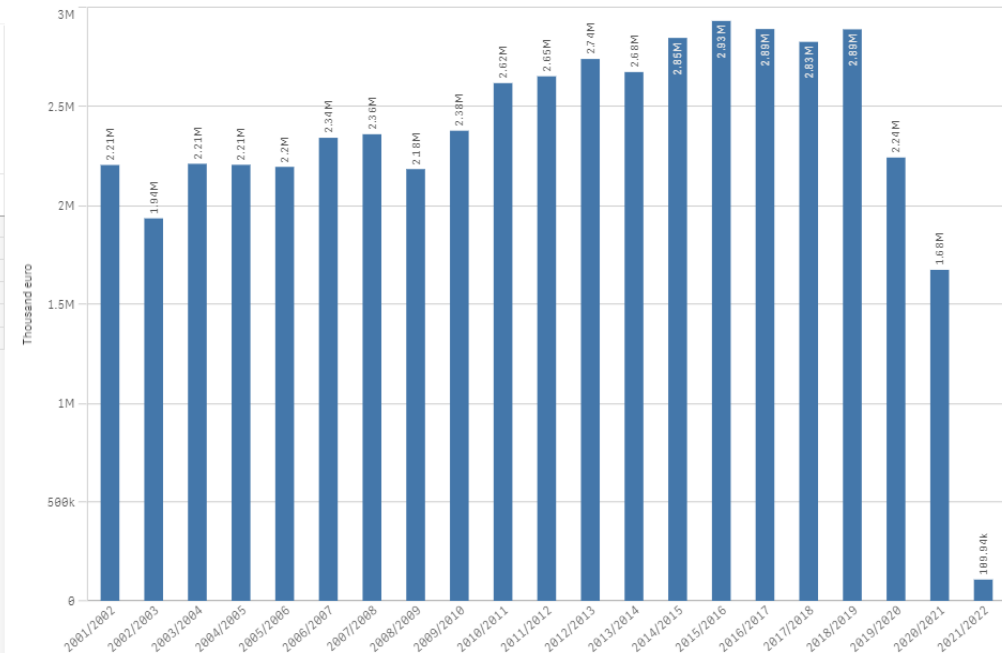
### Annual EU Trade, Value in thousand euro

EU, flow: IMPORT, all product categories, all product groups, all partners, all Marketing Years, all months. Rearrange the order of the dimensions (Product Group, Member State, Partner) to change the view.

	2021/2022	2020/2021	2019/2020	2018/2019	2017/2018	2016/2017	2015/2016	2014/2015
Total Product Categories	109 935	1 675 377	2 243 102	2 890 878	2 827 636	2 892 513	2 933 601	2 847 653
• Varietal Wines	56 770	804 106	933 631	911 610	857 729	833 383	846 649	811 437
• Other Wines	36 093	429 248	874 500	1 486 044	1 479 720	1 463 482	1 543 678	1 501 430
• PDO Wines	10 944	270 256	252 847	296 708	284 994	329 542	305 628	296 348
• PGI Wines	6 119	171 638	181 365	194 783	204 593	265 627	236 557	238 120
• Wine Must	9	130	758	1 733	600	400	1 089	317

### Annual EU Trade, Value in thousand euro

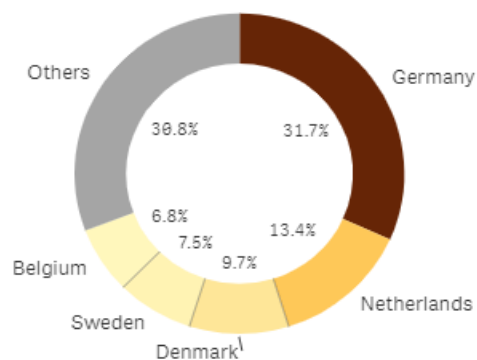
EU, flow: IMPORT, all product categories, all product groups, all partners, all Marketing Years, all months



# Imports 2020/2021 – per MS and partners

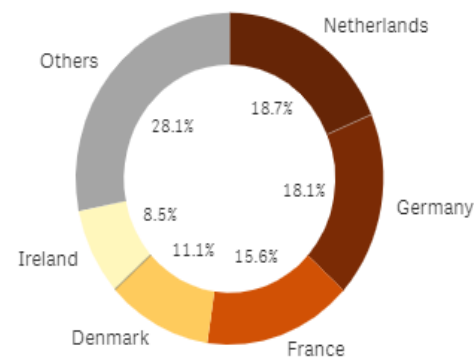
## EU Trade by Member States, Quantity in hectoliters

EU, flow: IMPORT, all product categories, all product groups, all partners, Marketing Year: 2020/2021, all months



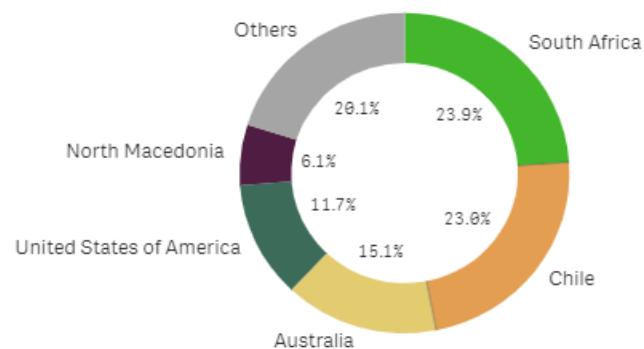
## EU Trade by Member States, Value in thousand euro

EU, flow: IMPORT, all product categories, all product groups, all partners, Marketing Year: 2020/2021, all months



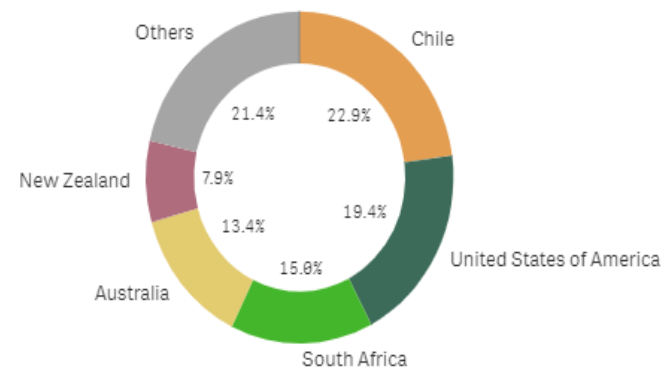
## EU Trade by Partners, Quantity in hectoliters

EU, flow: IMPORT, all product categories, all product groups, all partners, Marketing Year: 2020/2021, all months



## EU Trade by Partners, Value in thousand euro

EU, flow: IMPORT, all product categories, all product groups, all partners, Marketing Year: 2020/2021, all months





***Thank you for your attention !***

**<https://agridata.ec.europa.eu/extensions/DashboardWine/WineTrade.html>**

**<https://agridata.ec.europa.eu/extensions/DataPortal/wine.html>**