



# **EU Wine Market Observatory**

**Friday 10 June 2022 from 9h30 to 12h00**

**Wine Market situation and trade developments**



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

### Key facts:

- Overall **wine + must production 2021/22** would stand at **159 Mio HL**, at + 7% compared to forecasts (148 Mio HL). The fall in overall production is finally half that estimated last October (from -13% in October 21 to -7% in March 22), with a decline of **-7% compared to the production 2020/21** (170 Mio HL in 2020/21 <-> 159 Mio HL in 2021/22 = - 11 Mio HL = -7%).
- With 50.4 Mio HL, IT is once again the largest producer in EU (and in the world) and represents 32% of total production in the Union. IT is followed by ES (39.4 Mio HL) which produces 25% of the volume. For the second consecutive year, FR takes the third place (37.2 Mio HL) with 23% of the volume produced.
- These three MS alone represent 80% of the Union production.
- Two thirds of the wines produced are quality wines (this proportion remains stable: 45% are PDOs and 21% are PGIs,). Over the last decade, there is a trend towards a slight increase in the production of PDOs and varietal wines, a stability of the level of production of PGIs and a downward trend in the production of wines without appellations.
- Some MS clearly favor the production of quality wines: PDOs and PGIs represent 95% of production in CZ, 93% in DE and AT, 87% in PT, 84% in HR and 82% in HU. While in FR and IT, quality wines represent 70% of the production and in ES, only 48%.
- Exports reached record levels in 2020/21, and this trend continues for the first 8 months of the current campaign.



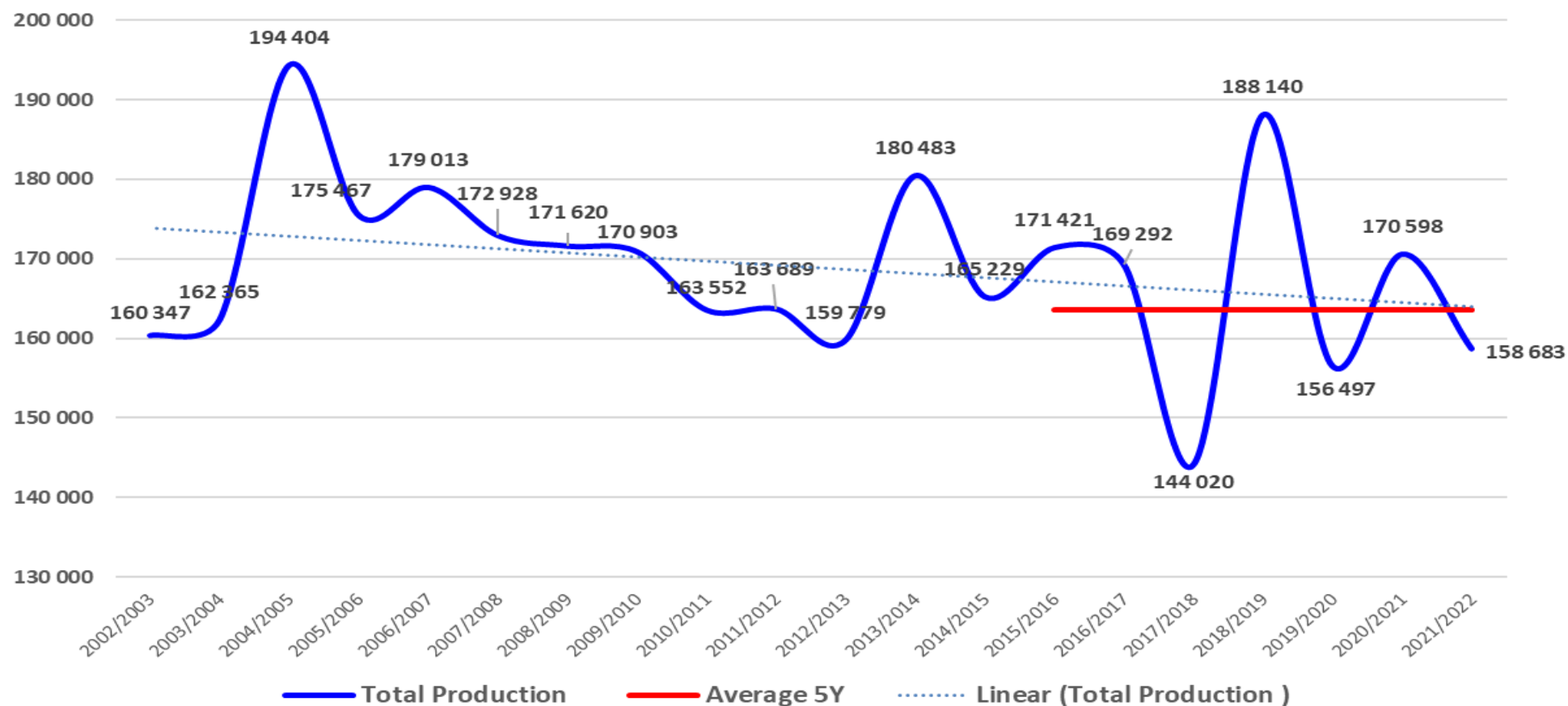
EU Wine and Must - Final production - 2021/2022 - all MS - 1000 HI

26-04-2022

Member State Isamm Order:	Prod 16/17	Prod 17/18	Prod 18/19	Prod 19/20	Prod 20/21	Forecast Wine 21/22	Forecast Must 21/22	Forecast Wine + Must 21/22	Final Wine 21/22	Final Must 21/22	Total final Wine + Must 21/22	Variation Final/Forecast	Variation Final/Forecast %	Variation Prod 20/21	Variation prod / n-1 %	Average 5 years	Variation 5YA	% 5YA
Belgium						0		0										
Bulgaria	1 245	1 157	1 084	917	823	884	0	884	841	52	893	9	1%	70	9%	975	-82	-8%
Czechia	631	645	691	492	603	618	8	626	579	14	592	-33	-5%	-11	-2%	605	-12	-2%
Denmark						0		0			0	0		0		0	0	
Germany	9 013	7 462	10 269	8 218	8 405	8 760	0	8 760	7 965	483	8 448	-312	-4%	43	1%	8 560	-112	-1%
Ireland						0		0			0	0		0		0	0	
Greece	2 581	2 410	2 235	2 425	2 283	1 696	14	1 710	2 416	53	2 469	758	44%	186	8%	2 364	104	4%
Spain	43 360	34 902	49 522	37 289	45 906	35 000	4 000	39 000	35 304	4 070	39 374	374	1%	-6 531	-14%	41 399	-2 024	-5%
France	45 562	36 783	49 571	42 299	45 785	33 327	0	33 327	37 132		37 132	3 805	11%	-8 653	-19%	42 314	-5 182	-12%
Croatia	613	576	733	525	660	569	0	569	526		526	-43	-8%	-134	-20%	604	-78	-13%
Italy	50 920	42 499	54 783	47 546	49 066	44 545	5	44 550	50 232	185	50 416	5 866	13%	1 350	3%	48 862	1 554	3%
Cyprus	81	110	109	100	89	66	0	66	68		68	2	3%	-21	-23%	95	-27	-29%
Latvia						0		0			0	0		0		0	0	
Lithuania						0		0			0	0		0		0	0	
Luxembourg	83	81	134	75	97	110		110	98		98	-12	-11%	2	2%	97	1	1%
Hungary	2 820	2 876	3 699	2 743	2 913	3 116	0	3 116	2 590	492	3 082	-35	-1%	168	6%	3 063	19	1%
Malta	14	15				11	0	11	11		11	1	5%	11		5	6	
Netherlands	8	6				7	0	7	8		8	1		8		3	5	
Austria	1 953	2 487	2 753	2 324	2 398	2 312	1	2 313	2 460		2 460	147	6%	61	3%	2 485	-25	-1%
Poland						20	0	20			0	-20		0		0	0	
Portugal	6 022	6 737	6 061	6 527	6 418	6 472	0	6 472	6 987	371	7 359	887	14%	941	15%	6 620	738	11%
Romania	3 323	4 346	5 189	3 918	4 032	5 257	0	5 257	4 797	26	4 823	-434	-8%	791	20%	4 462	361	8%
Slovenia	739	630	889	758	743	549	0	549	581		581	32	6%	-162	-22%	720	-139	-19%
Slovakia	315	298	389	321	357	347	0	347	338	4	342	-4	-1%	-15	-4%	342	1	0%
Sweden						0		0			0	0		0		0	0	
Others:						0		0			0	0		0		0	0	
Total	169 283	144 020	188 113	156 476	170 578	143 665	4 028	147 693	152 932	5 751	158 683	10 991	7%	-11 895	-7%	163 574	-4 891	-3%
Others:	9		27	21	20			Agriculture and Food								14	-14	
Total	169 292	144 020	188 140	156 497	170 598	143 665	4 028	147 693	152 932	5 751	158 683	10 991	7%	-11 915	-7%	163 588	-4 905	-3%

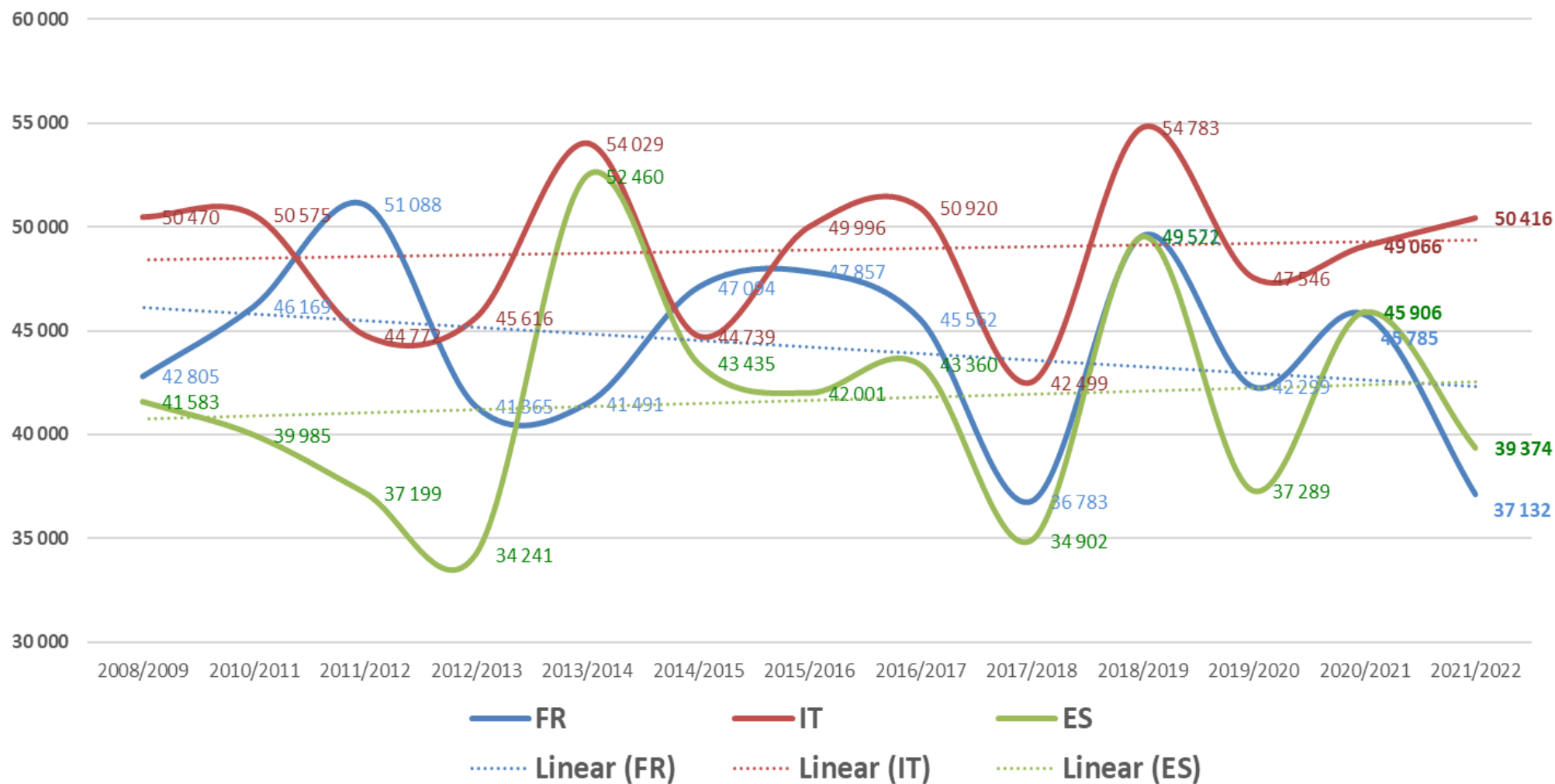
## Evolution EU - 27 Wine and Must Production April 2022 - in 1000 HI

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





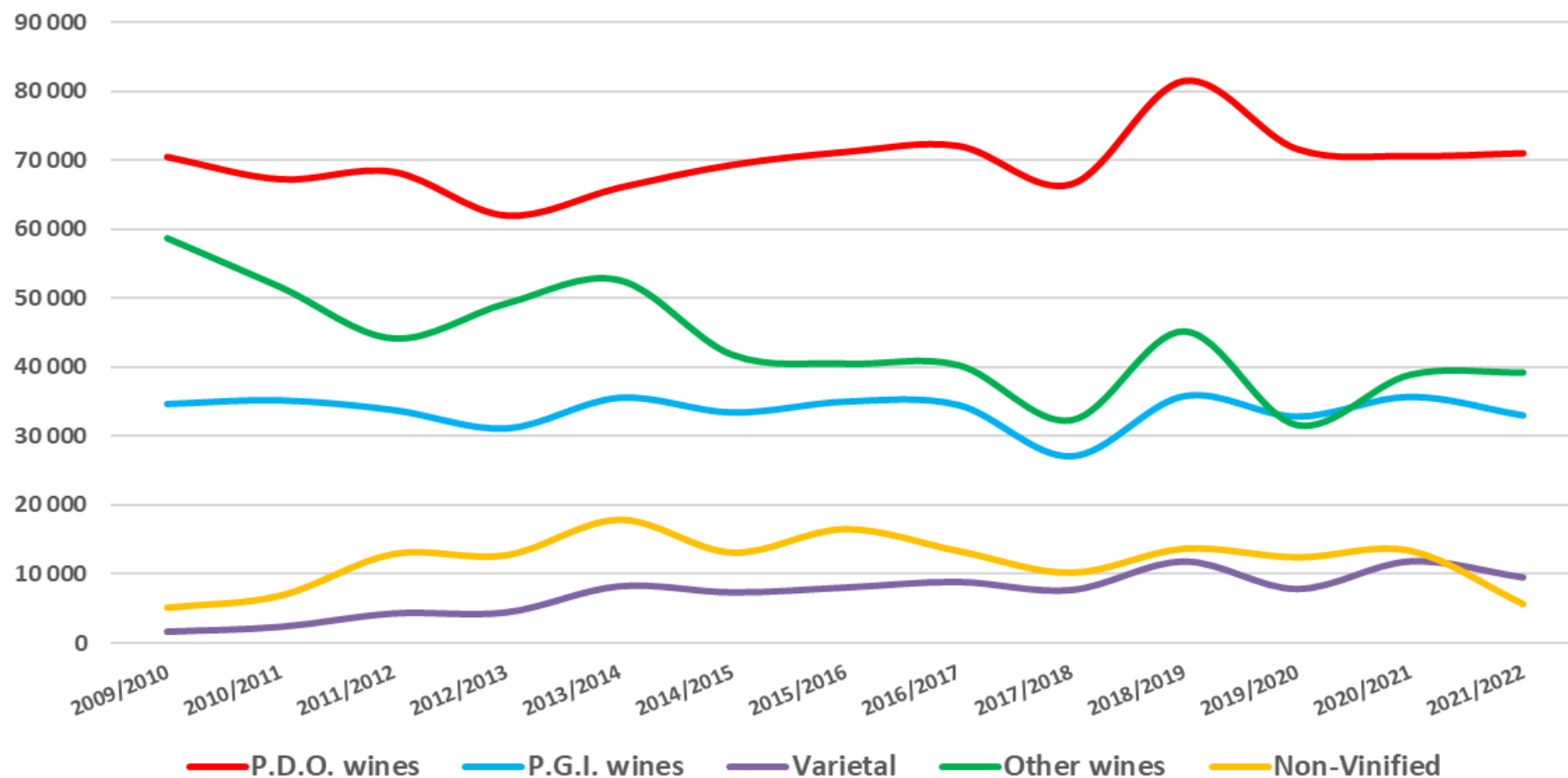
## Total wine and must production evolution - FR, IT and ES (in 1000 HI)





## Evolution EU - 27 Wine and Must Production per category April 2022 - in 1000 HI

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





# Opening Stocks 2021/2022: 175 Mio HI

European Commission | Wine production and opening stocks  
Directorate-General for Agriculture and Rural Development

SELECT VIEW: **Results** ▼ ?

Marketing Year:  Member State:  Category:  Opening Stock:  Total:

App update: 26/04/2022

Reset Selections

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All MS > All Category Groups > All Categories  
Marketing Year: 2021/2022

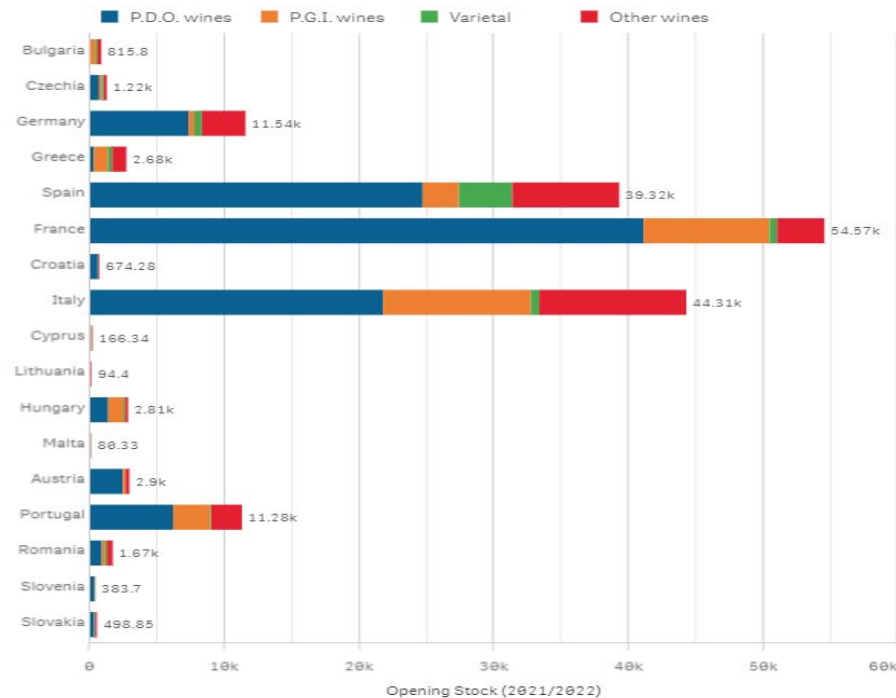
Opening Stock:  Total:

App update: 26/04/2022

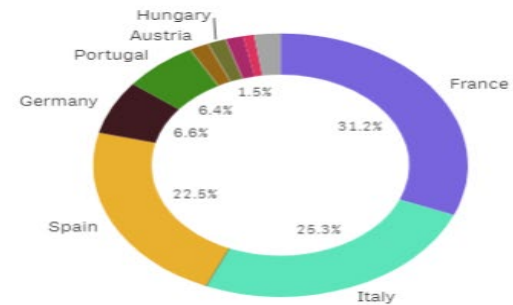
Reset Selections

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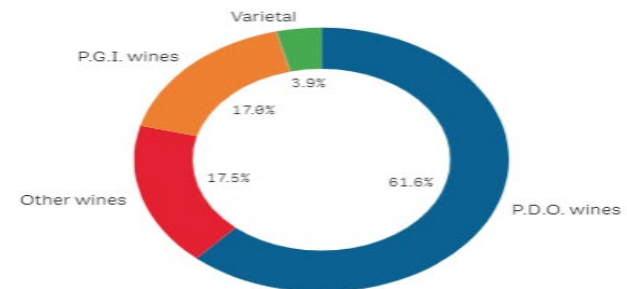
Production by Category and MS



Opening Stock by MS

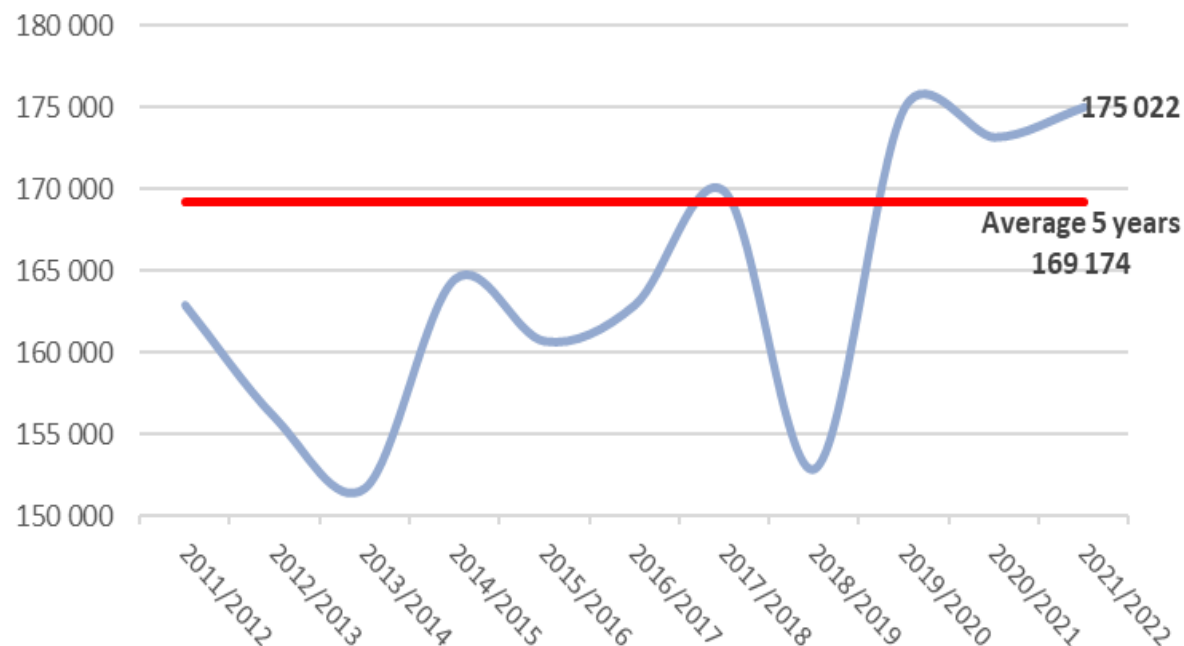


Opening Stock by Category



## Opening Stocks Evolution

Vinified wine - opening stock evolution - in 1000 HI



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>175 022</b>	<b>1%</b>
<b>Average 5 years</b>	<b>169 174</b>	<b>3%</b>

Source: Agri food data portal: <https://agridata.ec.europa.eu/extensions/DashboardWine/WineProduction.html>





# Exports 2020/2021: historical record: 28,8 Mio HI: +29% (+6,4 Mio HI, including 4,1 Mio HI exported to UK => +10% net) Trend 8 months 2021/2022: 20,6 MioHI =>+ 3,8 MioHI => +23% in volume

EU Composition: EU | Flow: EXPORT | Measure: Volume

Latest update: 12/05/2022 17:16:03

Product Category | Product Group | Member State | Partner | Marketing Year | Month | Reset Selections | Download to PDF

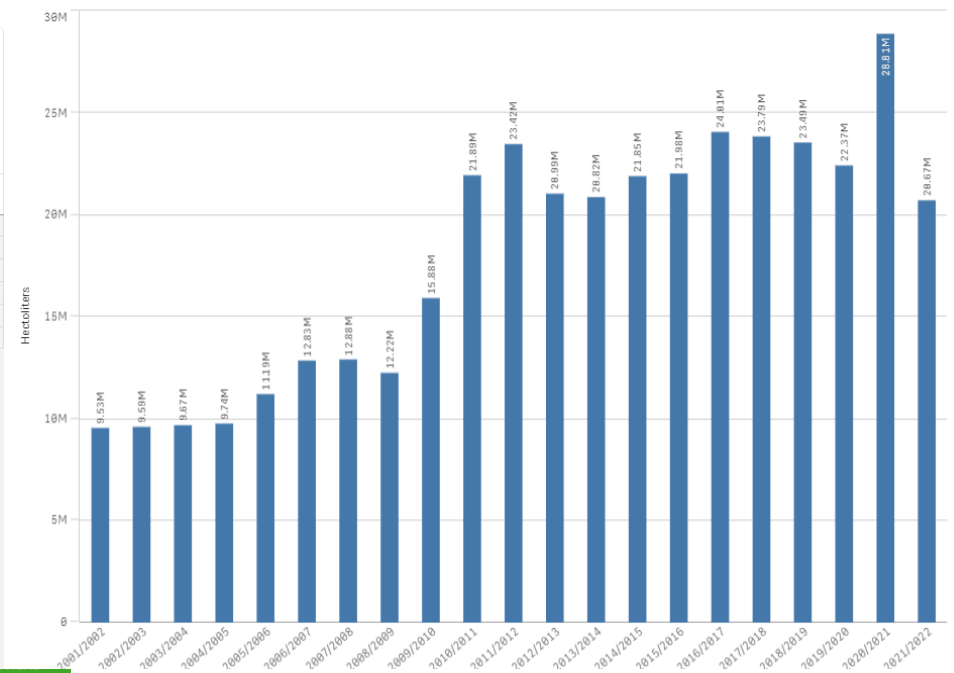
## Annual EU Trade, Quantity in hectoliters

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	20 666 154	28 889 192	22 370 413	23 491 668	23 787 822	24 009 705	21 975 520
• PDO Wines	11 307 692	15 440 374	11 475 546	11 776 955	11 602 798	10 941 249	10 022 471
• Other Wines	3 997 122	5 702 891	5 126 689	5 750 246	5 775 213	6 719 982	6 143 671
• PGI Wines	3 710 258	5 544 393	4 413 336	4 559 660	5 126 620	5 160 476	4 800 324
• Varietal Wines	1 507 259	1 828 926	1 100 144	1 159 895	1 084 441	983 789	815 268
• Wine Must	143 823	292 608	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) Trend 8 months 2021/2022: 10,7 Bio€ => +2,6 Bio€ => +32% in value

EU Composition: EU | Flow: EXPORT | Measure: Value

Latest update: 12/05/2022 17:16:03

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

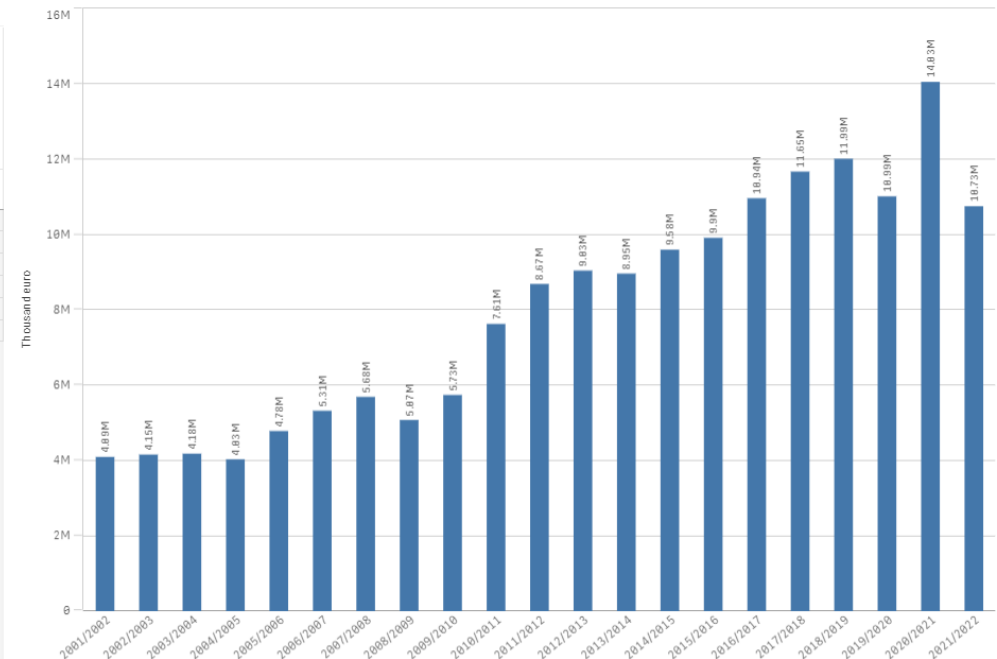
## Annual EU Trade, Value in thousand euro

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	10 731 638	14 025 981	10 993 618	11 988 929	11 649 558	10 943 650	9 895 623
• PDO Wines	8 458 765	10 862 062	8 390 768	9 252 227	8 824 707	8 194 649	7 391 153
• PGI Wines	1 215 462	1 758 135	1 460 678	1 495 819	1 599 221	1 604 028	1 486 706
• Other Wines	694 759	938 159	828 176	902 343	893 420	863 603	775 830
• Varietal Wines	328 782	402 886	263 873	281 121	274 424	230 433	199 281
• Wine Must	33 871	64 738	50 122	57 419	57 785	50 937	42 653

## Annual EU Trade, Value in thousand euro

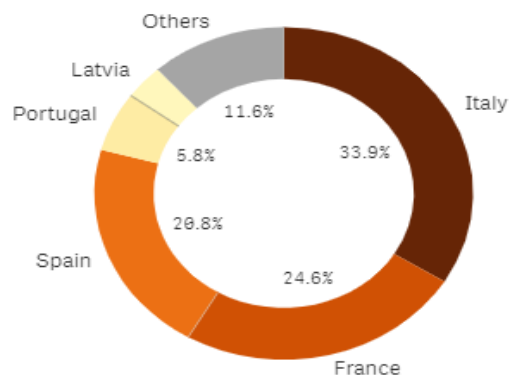
EU, flow: EXPORT, all product categories, all product groups, all partners, all Marketing Years, all months



## Exports 2020/2021 – per MS and partners

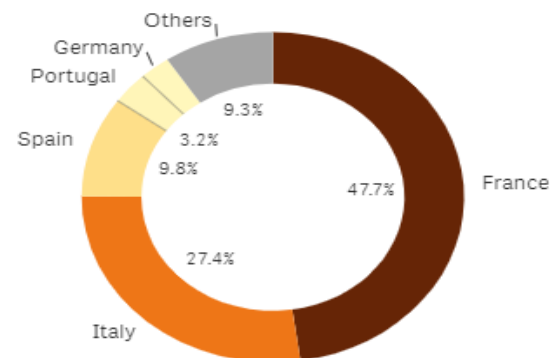
### EU Trade by Member States, Quantity in hectoliters

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



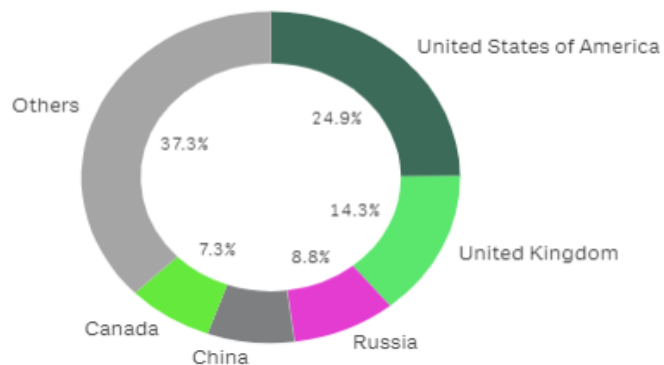
### EU Trade by Member States, Value in thousand euro

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



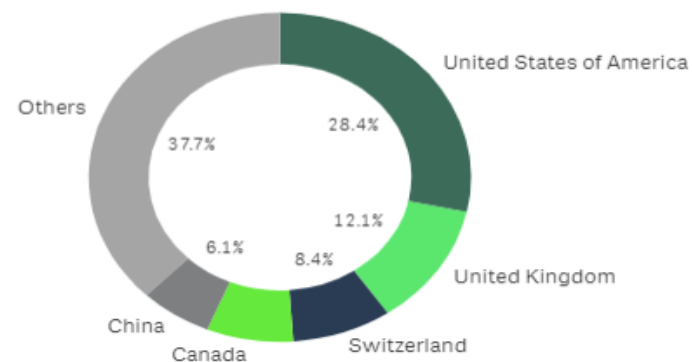
### EU Trade by Partners, Quantity in hectoliters

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 HI: -30% (-3 Mio HI, mainly UK share) Trend 8 months 2021/2022: 4,4 MioHI => -200 000HI => -5% in volume



## Wine trade

Directorate-General for Agriculture and Rural Development

SELECT VIEW: **Annual Trade Data**

EU Composition:  Flow:  Measure:

Latest update: 12/05/2022 17:16:03

Product Category:  Product Group:  Member State:  Partner:  Marketing Year:  Month:

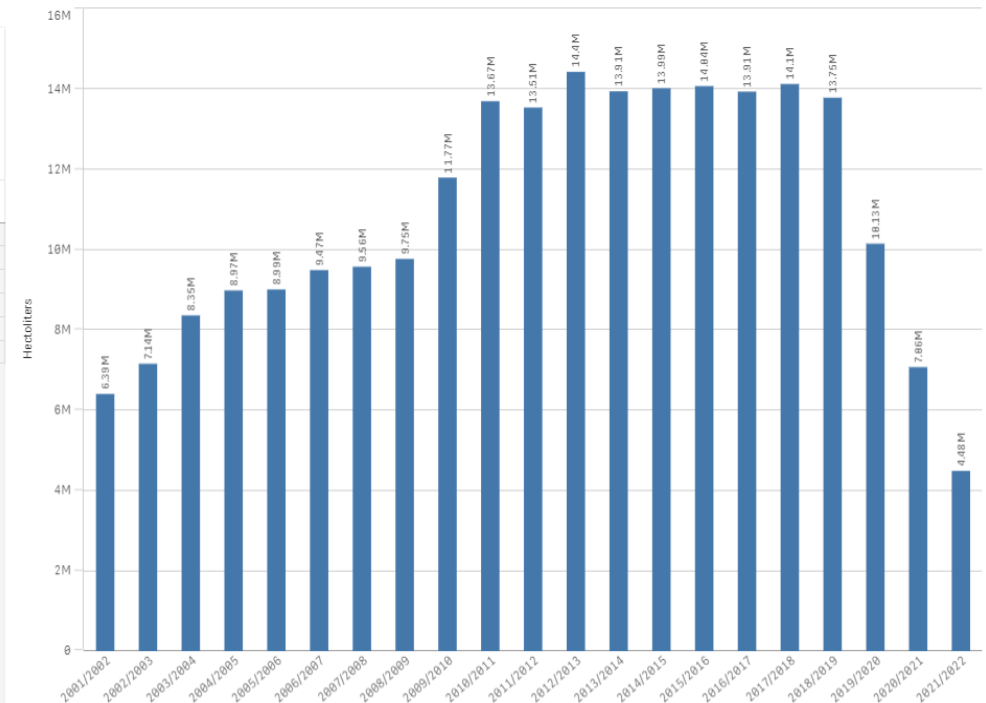
### Annual EU Trade, Quantity in hectoliters

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
Total Product Categories	4 482 824	7 060 721	10 126 836	13 754 426	14 095 377	13 905 779	14 043 428
• Varietal Wines	2 577 416	4 200 159	4 647 466	4 395 209	4 480 397	4 303 251	4 336 413
• Other Wines	1 581 502	2 293 572	4 892 574	8 358 300	8 534 994	8 150 416	8 267 838
• PGI Wines	211 739	376 983	401 608	683 634	740 133	1 004 559	990 253
• PDO Wines	111 722	189 710	182 719	311 060	331 963	444 893	438 628
• Wine Must	445	297	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 UK share) Trend 8 months 2021/2022: 1,2 Bio€ => +108 Mio€ => +10% in value



Wine trade

Directorate-General for Agriculture and Rural Development

SELECT VIEW: **Annual Trade Data** ▼ ⋮

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

Latest update: **12/05/2022 17:16:03**

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

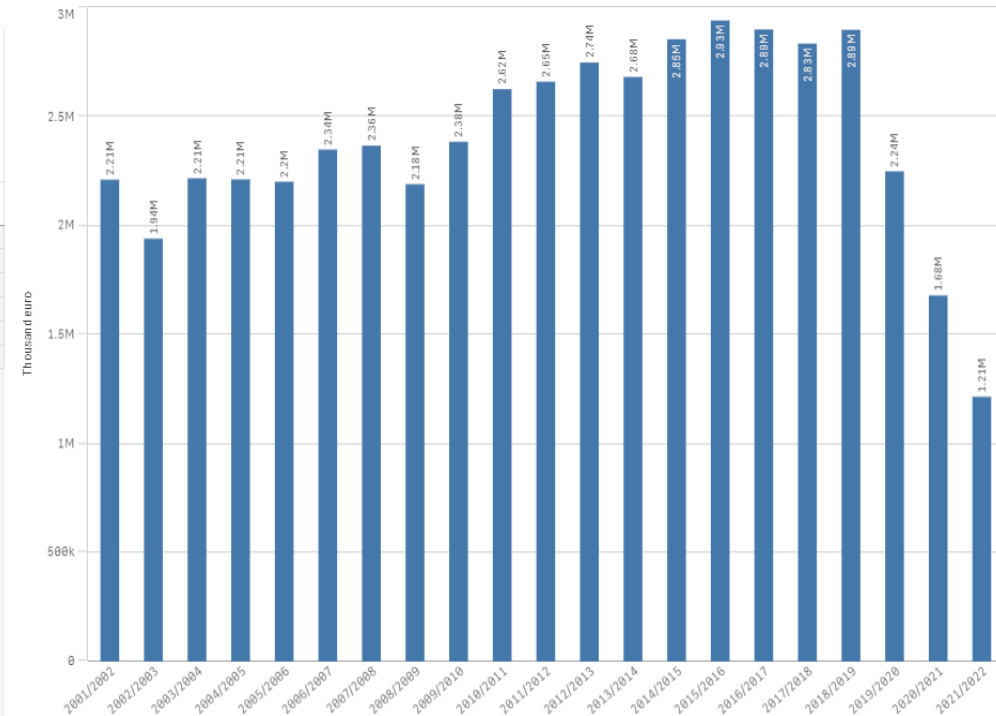
## Annual EU Trade, Value in thousand euro

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.

	Marketing Year							
	2021/2022	2020/2021	2019/2020	2018/2019	2017/2018	2016/2017	2015/2016	2014/2015
Total Product Categories	<b>1 212 384</b>	<b>1 675 696</b>	<b>2 243 190</b>	<b>2 890 857</b>	<b>2 827 636</b>	<b>2 892 513</b>	<b>2 933 601</b>	<b>2 847 653</b>
• Varietal Wines	542 064	803 733	933 640	911 605	857 729	833 383	846 649	811 437
• Other Wines	324 822	429 630	874 433	1 486 028	1 479 720	1 463 482	1 543 678	1 501 430
• PDO Wines	226 212	270 525	252 940	296 708	284 994	329 542	305 628	296 348
• PGI Wines	119 152	171 680	181 419	194 783	204 593	265 627	236 557	238 120
• Wine Must	134	129	758	1 733	600	480	1 089	317

## Annual EU Trade, Value in thousand euro

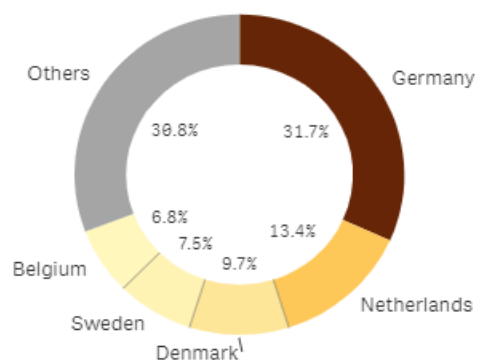
EU, flow: IMPORT, all product categories, all product groups, all partners, all Marketing Years, all months



# Imports 2020/2021 – per MS and partners

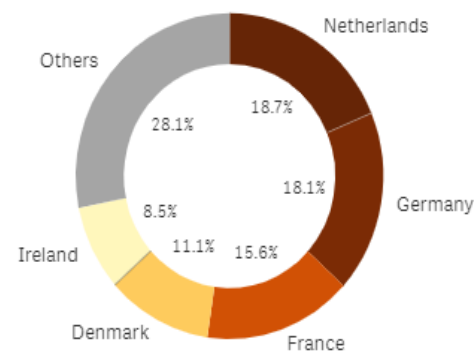
## EU Trade by Member States, Quantity in hectoliters

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



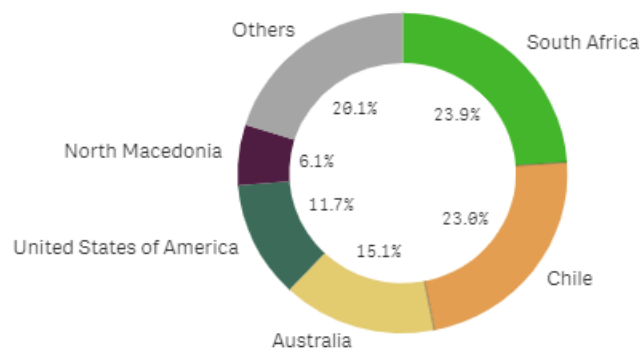
## EU Trade by Member States, Value in thousand euro

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



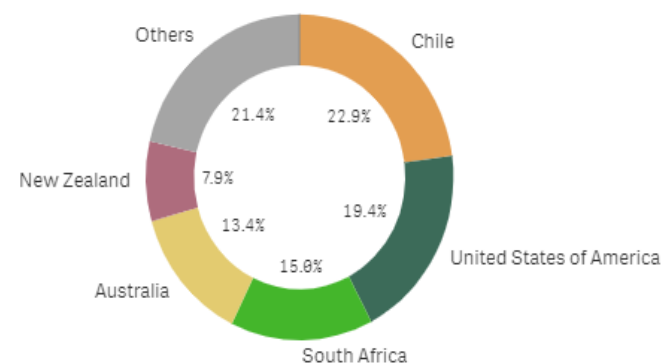
## EU Trade by Partners, Quantity in hectoliters

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 !***

## **Wine**

Market data on national and European agriculture provided by the European Commission's agricultural and rural development department. Browse visualisations about imports, exports, prices and production.

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

## **Wine market observatory meeting reports**

List of economic board meetings, agendas and reports.

**[https://ec.europa.eu/info/food-farming-fisheries/farming/facts-and-figures/markets/overviews/market-observatories/wine/wmo-meeting-reports\\_en](https://ec.europa.eu/info/food-farming-fisheries/farming/facts-and-figures/markets/overviews/market-observatories/wine/wmo-meeting-reports_en)**