



# **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 HI**, at + 7% compared to forecasts (148 Mio HI). 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 HI in 2020/21 <-> 159 Mio HI in 2021/22 = - 11 Mio HI = -7%).
- With 50.4 Mio HI, 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 HI) which produces 25% of the volume. For the second consecutive year, FR takes the third place (37.2 Mio HI) 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

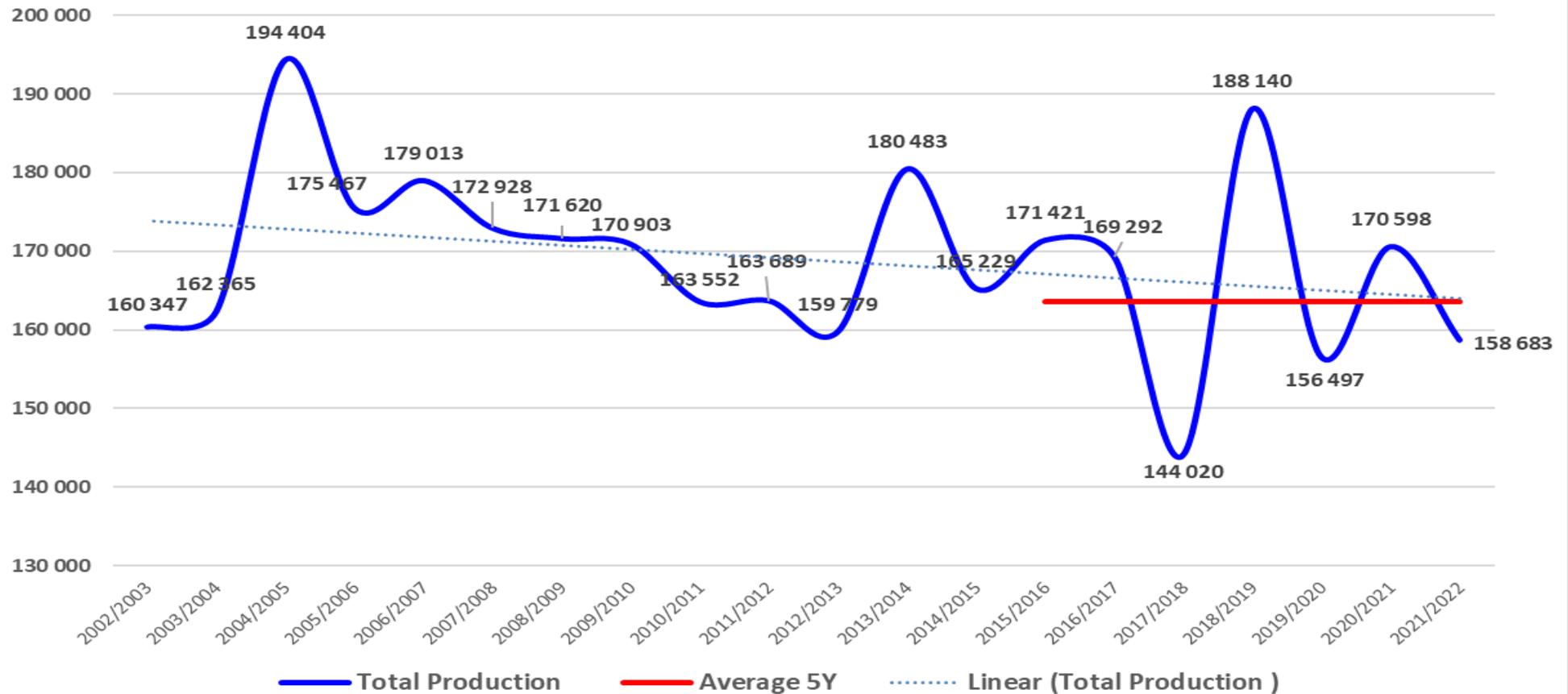
26-04-2022

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		
<b>Total</b>	<b>169 283</b>	<b>144 020</b>	<b>188 113</b>	<b>156 476</b>	<b>170 578</b>	<b>143 665</b>	<b>4 028</b>	<b>147 693</b>	<b>152 932</b>	<b>5 751</b>	<b>158 683</b>	<b>10 991</b>	<b>7%</b>	<b>-11 895</b>	<b>-7%</b>	<b>163 574</b>	<b>-4 891</b>	<b>-3%</b>	
Others:	9		27	21	20			Agriculture and Food								14	-14		
<b>Total</b>	<b>169 292</b>	<b>144 020</b>	<b>188 140</b>	<b>156 497</b>	<b>170 598</b>	<b>143 665</b>	<b>4 028</b>	<b>147 693</b>	<b>152 932</b>	<b>5 751</b>	<b>158 683</b>	<b>10 991</b>	<b>7%</b>	<b>-11 915</b>	<b>-7%</b>	<b>163 588</b>	<b>-4 905</b>	<b>-3%</b>	



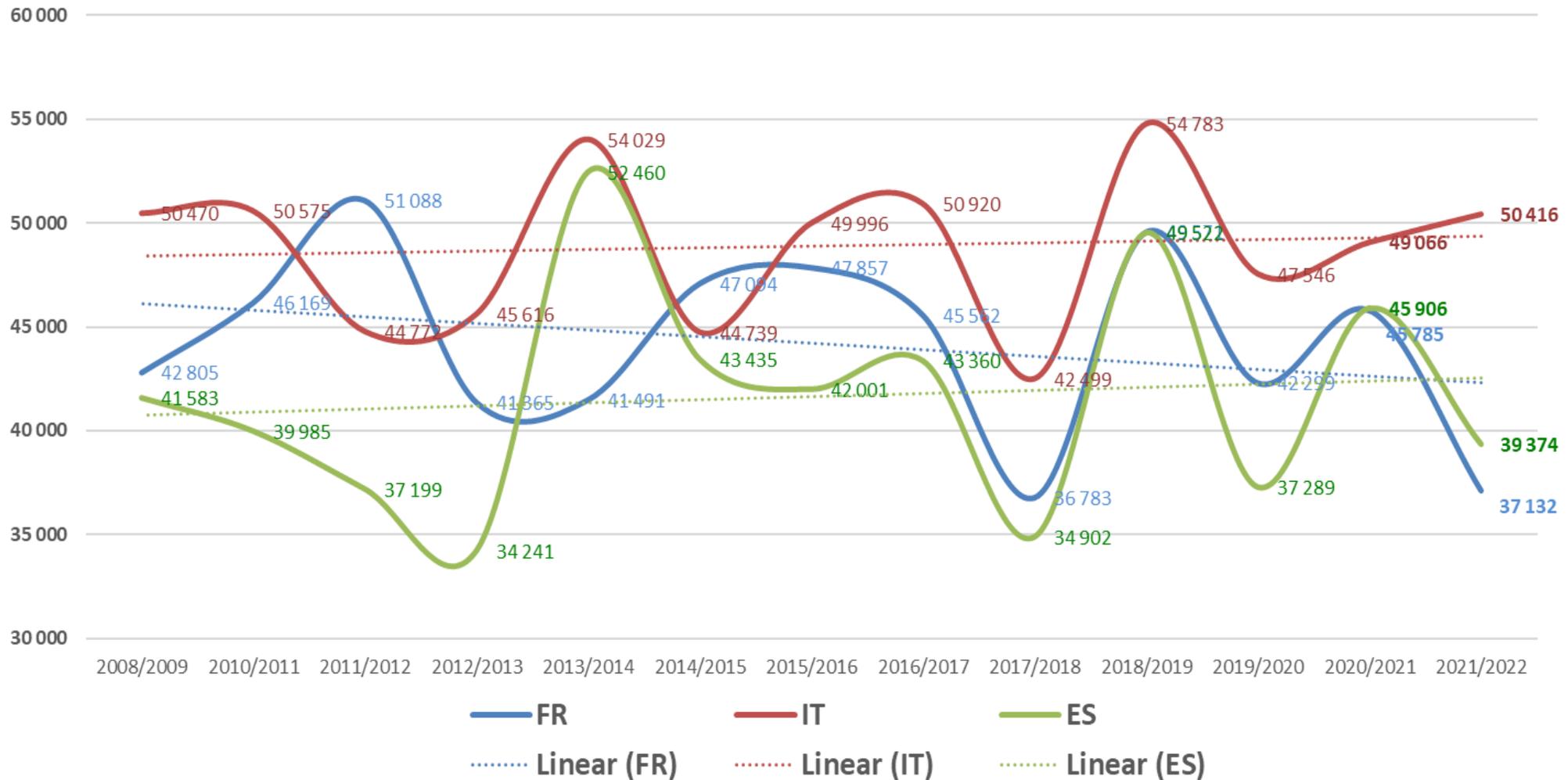
## Evolution EU - 27 Wine and Must Production April 2022 - in 1000 HI

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





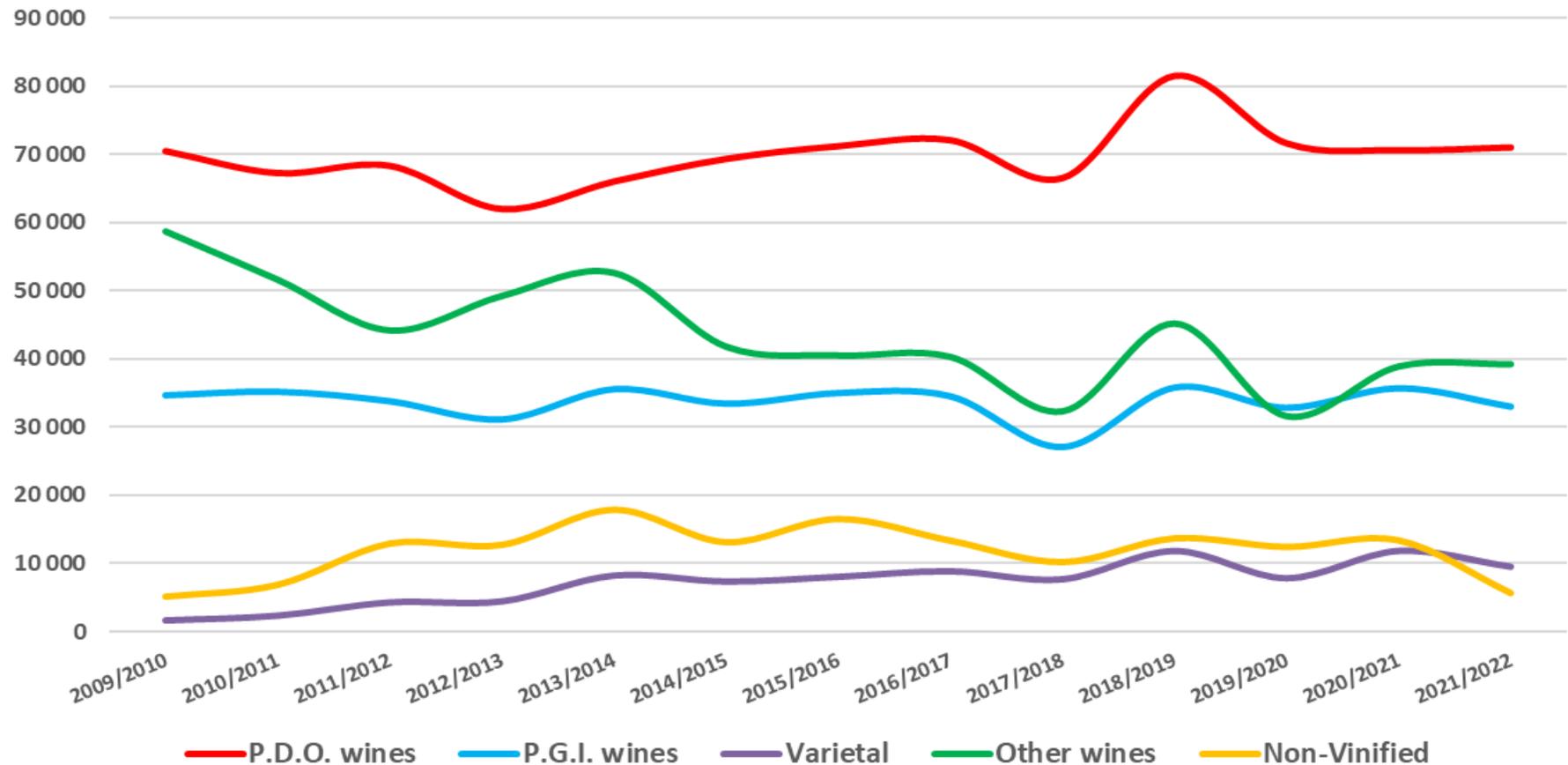
## Total wine and must production evolution - FR, IT and ES (in 1000 HI)





## 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

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

App update: 26/04/2022

SELECT VIEW: Results

Reset Selections

Download to PDF

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

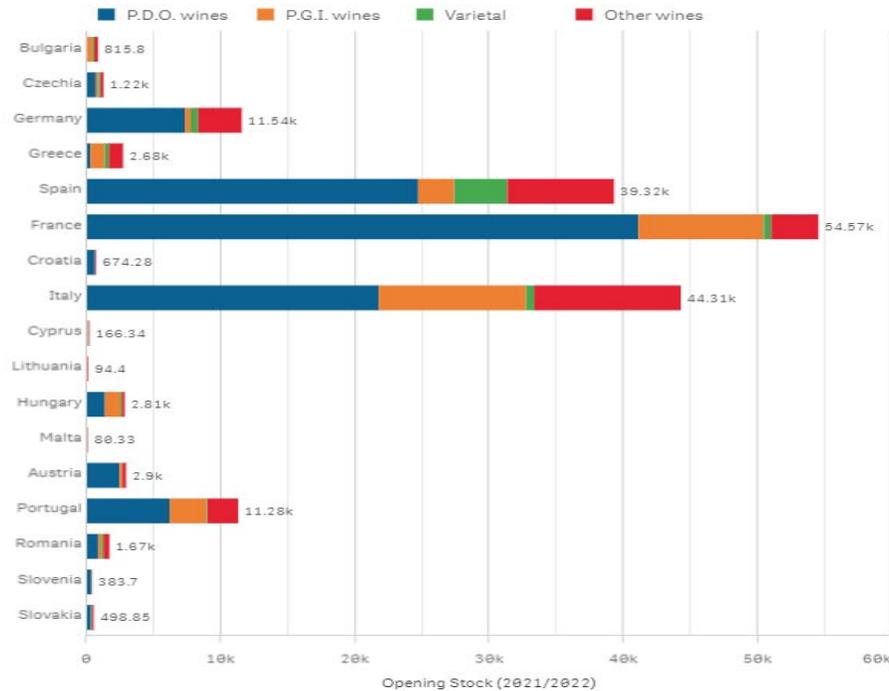
Opening Stock:  Total:

App update: 26/04/2022

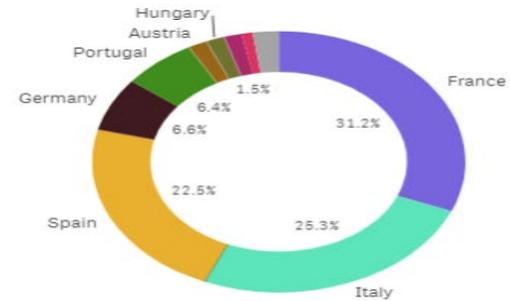
Reset Selections

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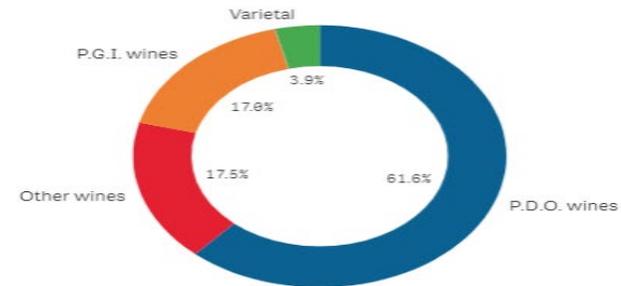
Production by Category and MS



Opening Stock by MS

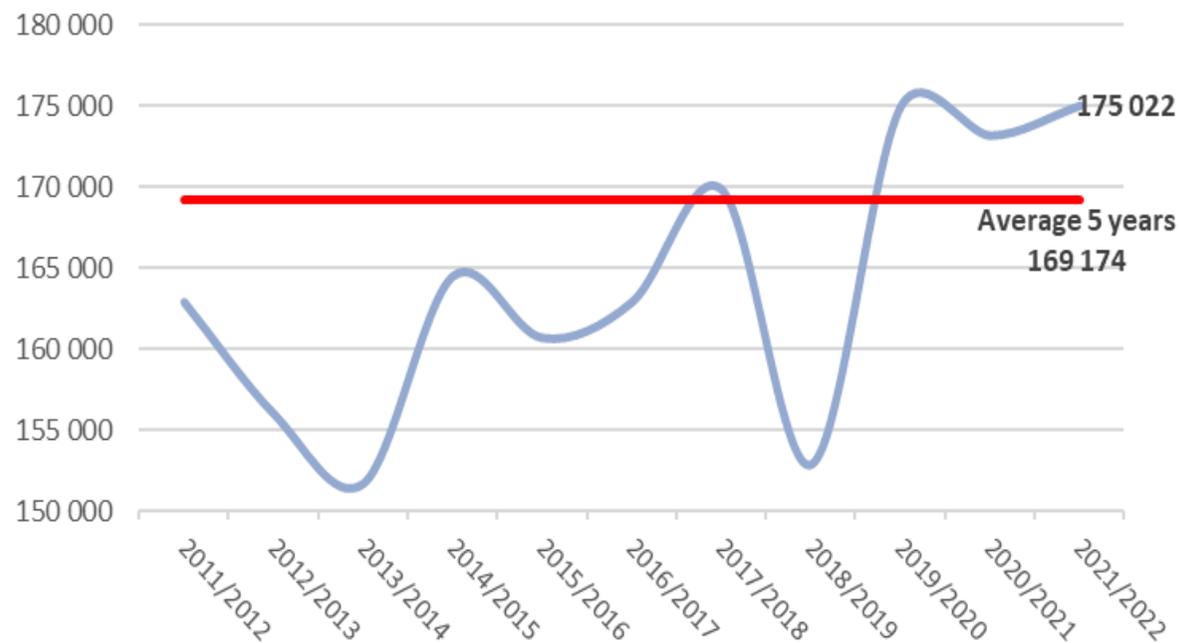


Opening Stock by Category



## 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>



# 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

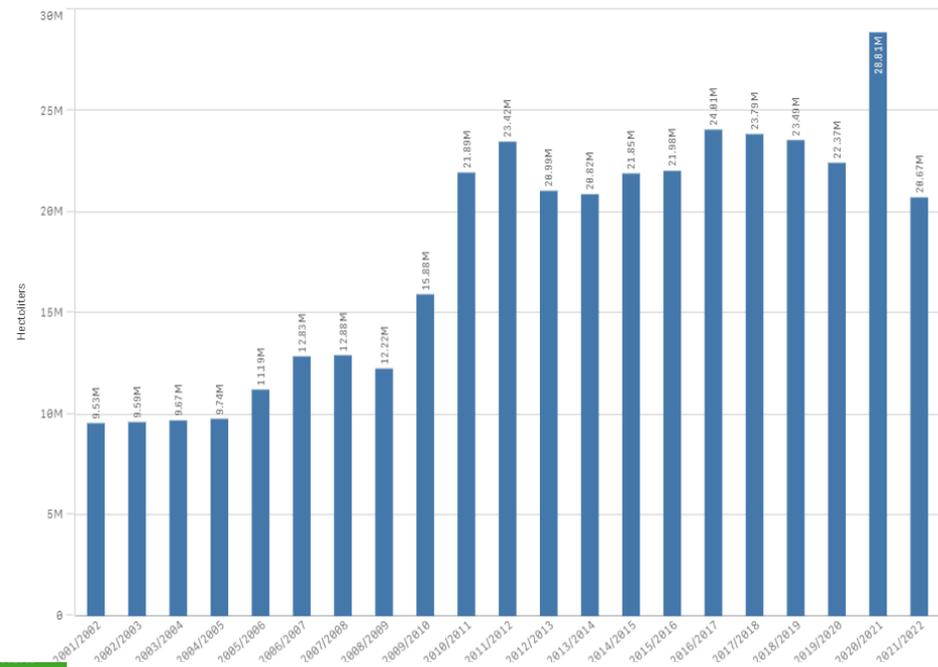
### Annual EU Trade, Quantity in hectoliters

EU, flow: EXPORT, all product categories, all 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

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

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

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

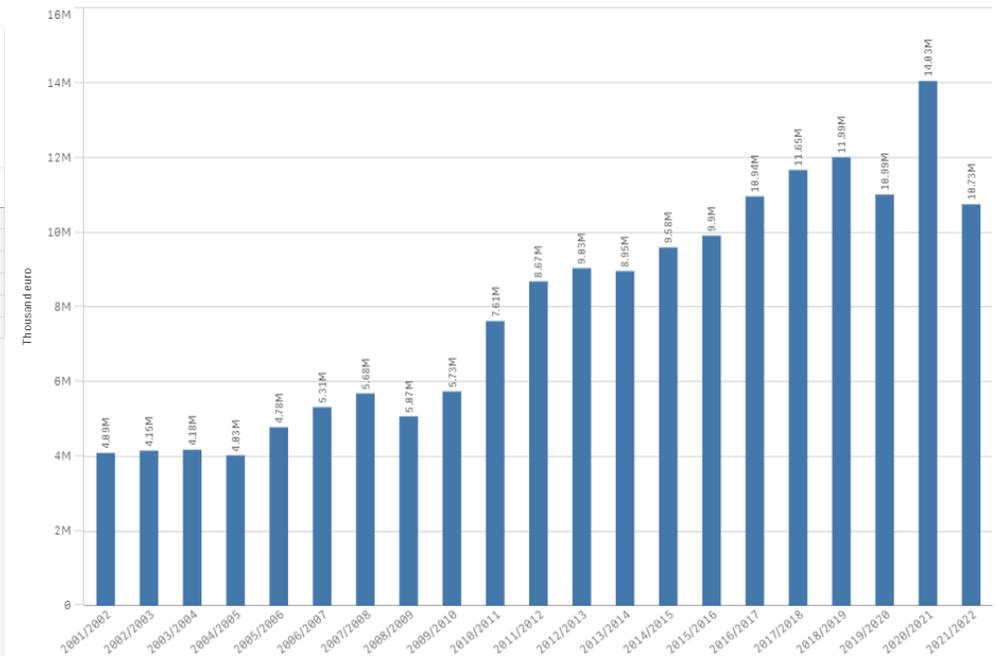
### Annual EU Trade, Value in thousand euro

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

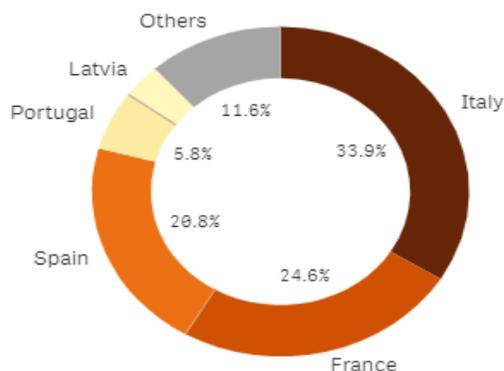




# Exports 2020/2021 – per MS and partners

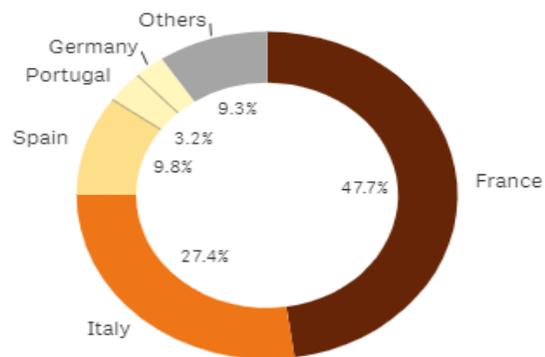
## EU Trade by Member States, Quantity in hectoliters

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



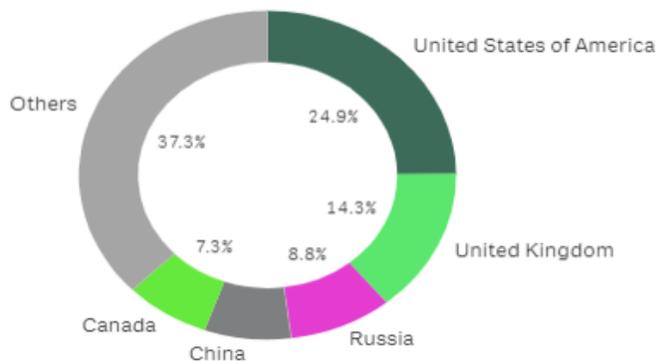
## EU Trade by Member States, Value in thousand euro

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



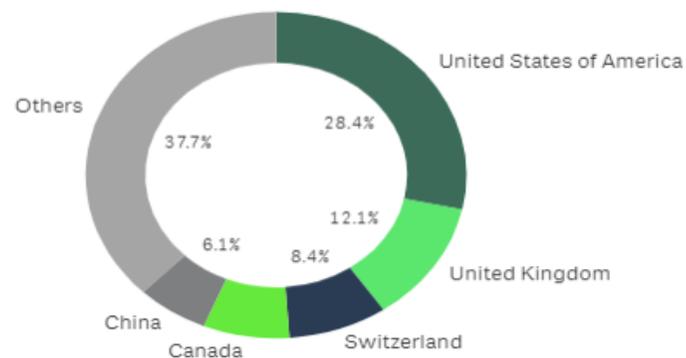
## EU Trade by Partners, Quantity in hectoliters

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

EU Composition: EU | Flow: IMPORT | 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

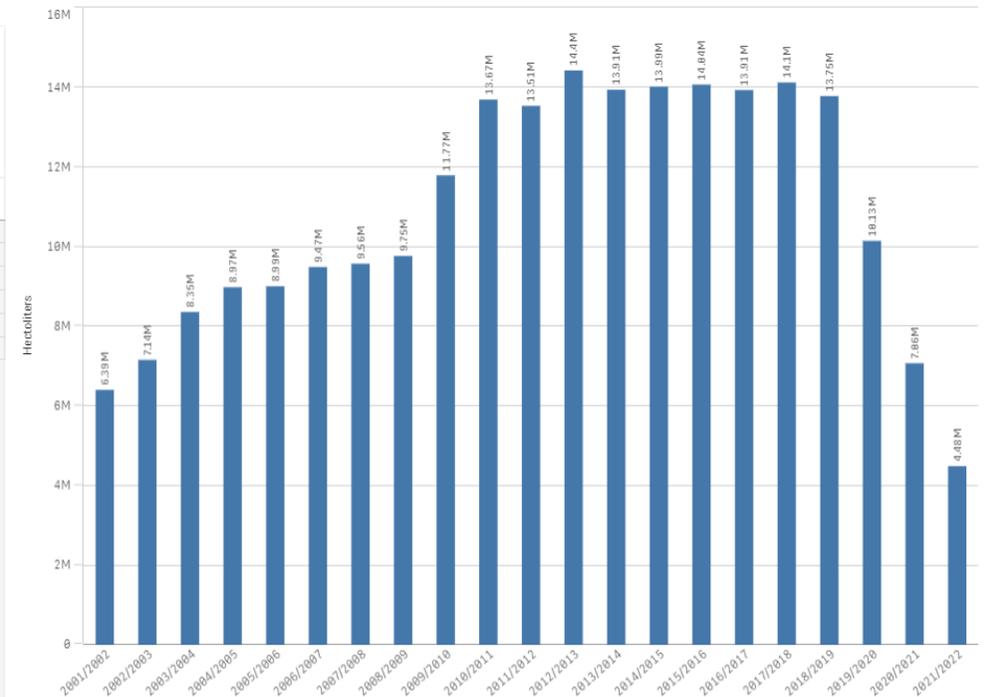
### Annual EU Trade, Quantity in hectoliters

EU, flow: 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>4 482 824</b>	<b>7 060 721</b>	<b>10 126 836</b>	<b>13 754 426</b>	<b>14 095 377</b>	<b>13 905 779</b>	<b>14 043 428</b>
• 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

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

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

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

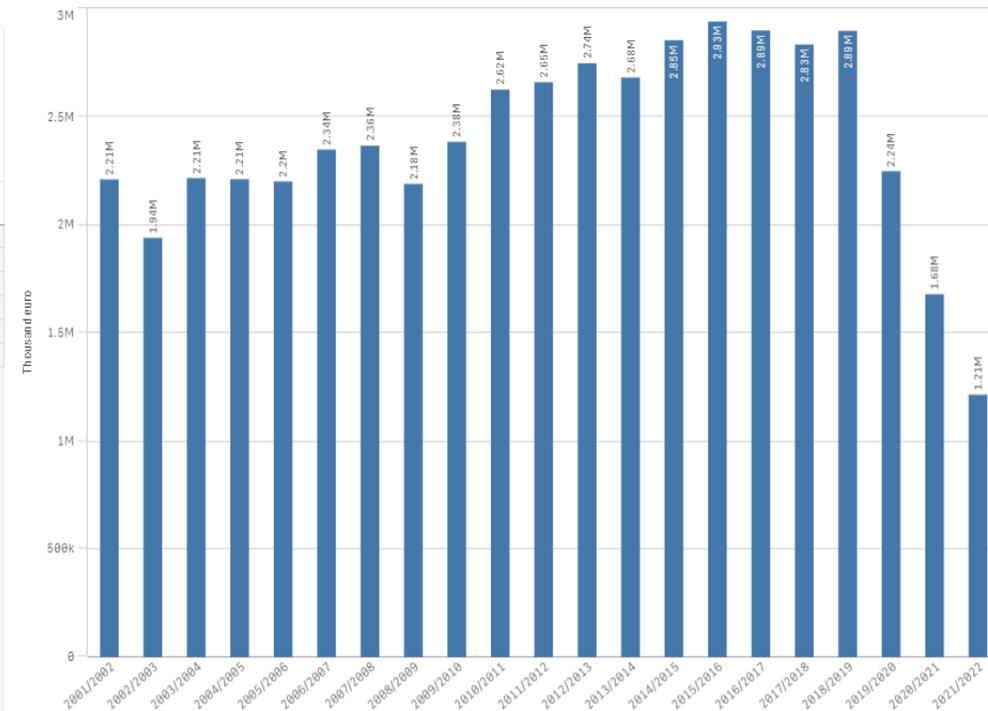
### Annual EU Trade, Value in thousand euro

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
<b>Total Product Categories</b>	<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

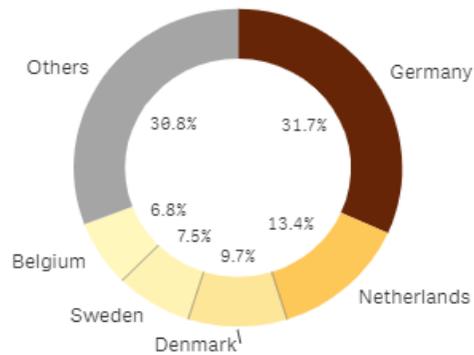




# Imports 2020/2021 – per MS and partners

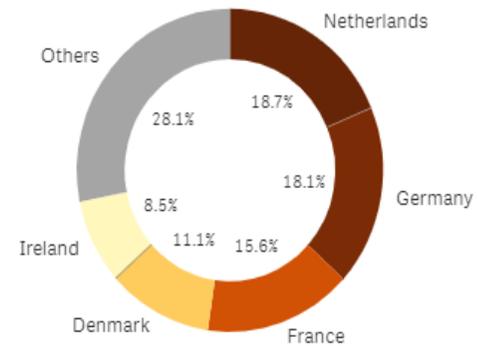
## EU Trade by Member States, Quantity in hectoliters

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



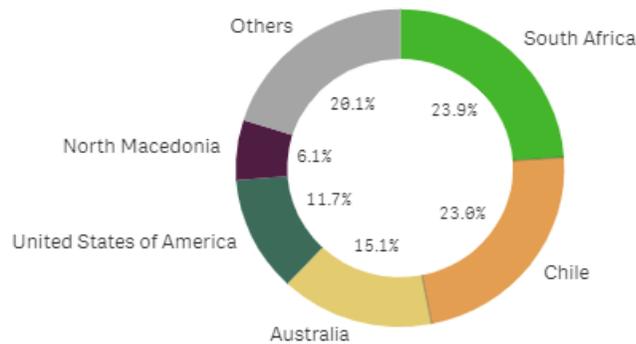
## EU Trade by Member States, Value in thousand euro

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



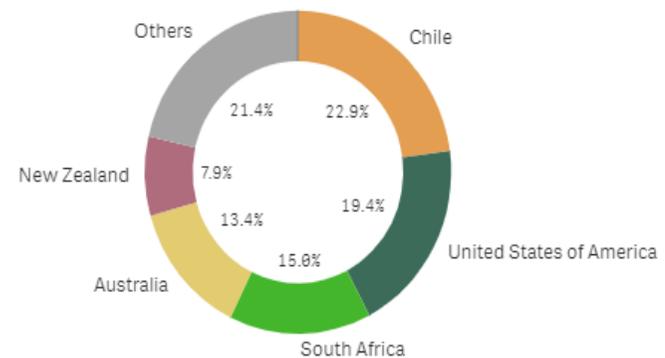
## EU Trade by Partners, Quantity in hectoliters

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)