



MEETING OF THE EXPERT GROUP WINE MARKET OBSERVATORY

**Meeting via videoconference (Interactio)
on 14 November 2022 from 10:00 to 13:00**

Wine Market situation and trade developments



EU wine and must production – forecast 2022/2023:

Key facts:

- **The estimated EU 2022/23 production (161 MioHI) foresees yields slightly increasing compared to the 2021/22 production (+1%), but remains below the five-year average (-2%). All the observers foresee a vintage 2022/23 of very good quality.**
- **With an estimated production of 50,3 MioHI (same as 2021), Italy would remain at the top, followed France (44 MioHI +18%) and Spain (37 MioHI -7 %).**
- **These three MS alone represent 81% of the Union production (IT 31%, FR 27% and ES 23%).**
- **More than two thirds of the wines produced are quality wines (this proportion remains stable: 47% are PDOs and 22% are PGIs). Over the last three campaigns, there is a trend towards a slight increase in the production of PDOs, PGIs and varietal wines while the production of wines without appellations is going downward.**
- **Some MS clearly favor the production of quality wines: PDOs and PGIs represent 100% of production in DE, between 86% and 95% in CZ, AT, HU, PT, SI and SK . While in FR and IT, quality wines represent respectively 74% and 70% of the production and in ES, only 50%.**
- **Exports is still showing an overall positive trend (record levels reached in 2020/21 beaten in 2021/22) , even if for two months this trend has been going down.**



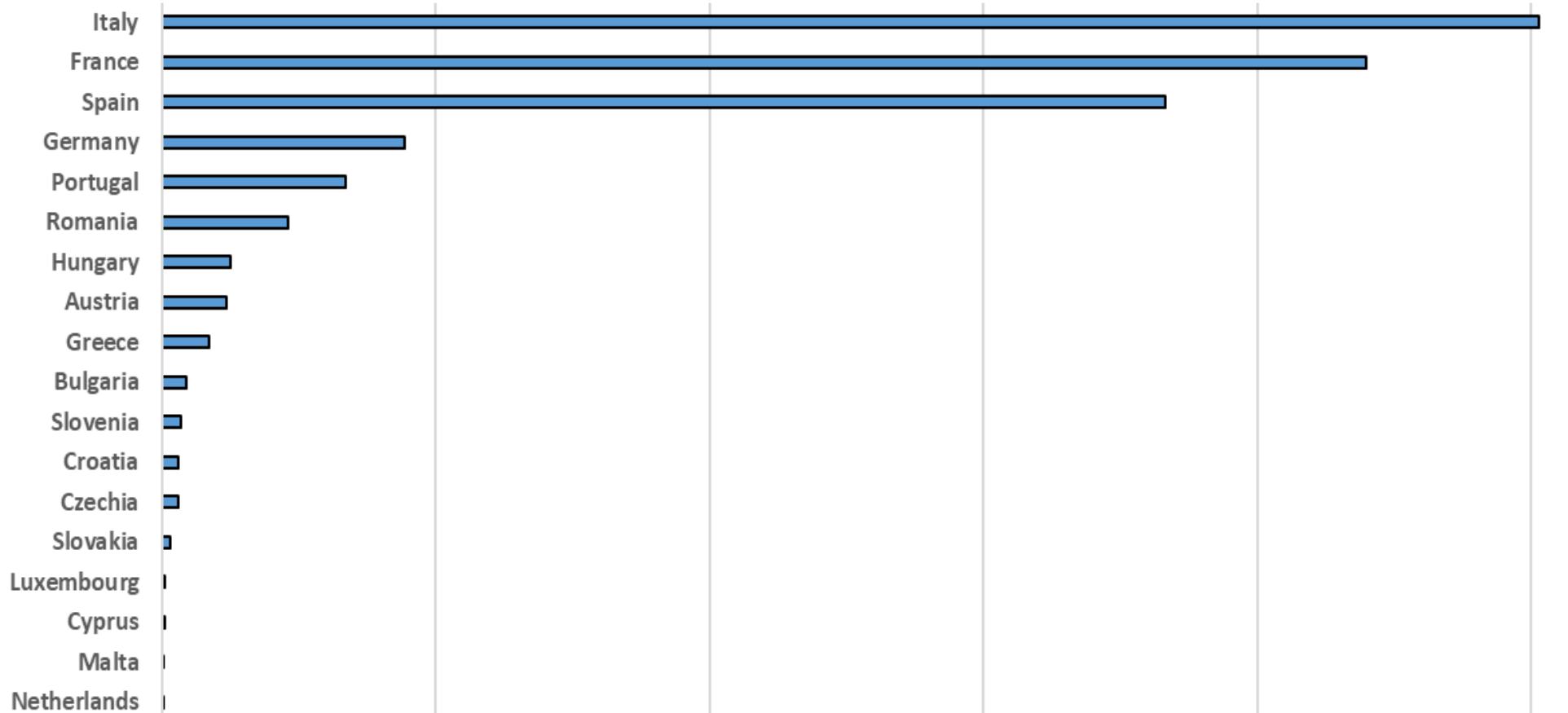
EU Wine and Must - production forecast - 2022/2023 - all MS - 1000 HI

12/10/22

	Member State Isamm Order:	Prod 16/17	Prod 17/18	Prod 18/19	Prod 19/20	Prod 20/21	Prod 21/22	Forecast Wine 22/23	Forecast Must 22/23	Forecast Wine + Must 22/23	Variation n-1 1000 HI	Variation n-1 %	Moyenne 5 ans	Ecart à la moyenne	Ecart à la moyenne %
1	Belgium									0	0				
2	Bulgaria	1 245	1 157	1 084	917	823	893	885		885	-7	-1%	975	-89	-9%
3	Czechia	631	645	691	492	603	592	567	7	575	-18	-3%	605	-30	-5%
4	Denmark						0			0	0		0	0	
5	Germany	9 013	7 462	10 269	8 218	8 405	8 448	8 882		8 882	433	5%	8 560	321	4%
6	Ireland						0			0	0		0	0	
7	Greece	2 581	2 410	2 235	2 425	2 283	2 469	1 716	10	1 726	-743	-30%	2 364	-638	-27%
8	Spain	43 360	34 902	49 522	37 289	45 906	39 374	32 959	3 700	36 659	-2 715	-7%	41 399	-4 740	-11%
9	France	45 562	36 783	49 571	42 299	45 785	37 132	43 960		43 960	6 828	18%	42 314	1 646	4%
10	Croatia	613	576	733	525	660	526	587		587	61	12%	604	-17	-3%
11	Italy	50 920	42 499	54 783	47 546	49 066	50 416	50 270	35	50 305	-111	0%	48 862	1 443	3%
12	Cyprus	81	110	109	100	89	68	79		79	11	16%	95	-16	-17%
13	Latvia						0			0	0		0	0	
14	Lithuania						0			0	0		0	0	
15	Luxembourg	83	81	134	75	97	98	90		90	-8	-9%	97	-7	-7%
16	Hungary	2 820	2 876	3 699	2 743	2 913	3 082	2 505		2 505	-576	-19%	3 063	-557	-18%
17	Malta	14	15				11	13		13	2	14%	5	7	142%
18	Netherlands	8	6				8	8		8	0	3%	3	5	195%
19	Austria	1 953	2 487	2 753	2 324	2 398	2 460	2 326	5	2 331	-129	-5%	2 485	-154	-6%
20	Poland						0			0	0		0	0	
21	Portugal	6 022	6 737	6 061	6 527	6 418	7 359	6 725		6 725	-633	-9%	6 620	105	2%
22	Romania	3 323	4 346	5 189	3 918	4 032	4 823	4 623		4 623	-200	-4%	4 462	162	4%
23	Slovenia	739	630	889	758	743	581	670		670	89	15%	720	-50	-7%
24	Slovakia	315	298	389	321	357	342	321		321	-21	-6%	342	-21	-6%
25	Sweden						0			0	0		0	0	
	Others:	9		27	21	20	0			0	0		14	-14	
	Total	169 292	144 020	188 140	156 497	170 598	158 683	157 187	3 758	160 945	2 261	1%	163 588	-2 643	-2%

EU Wine and Must - production forecast - 2022/2023 - all MS - 1000 Hl

0 10 000 20 000 30 000 40 000 50 000

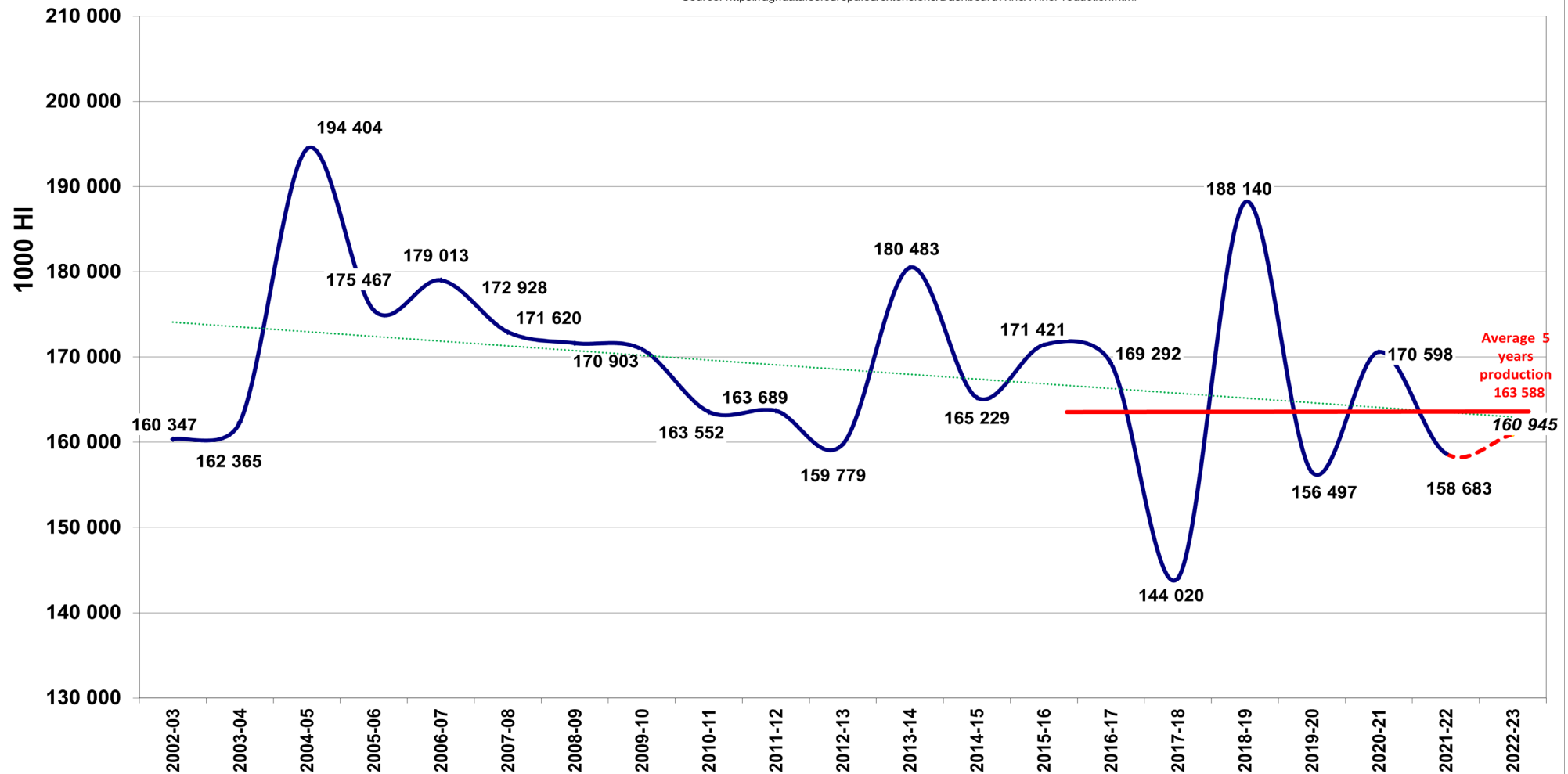




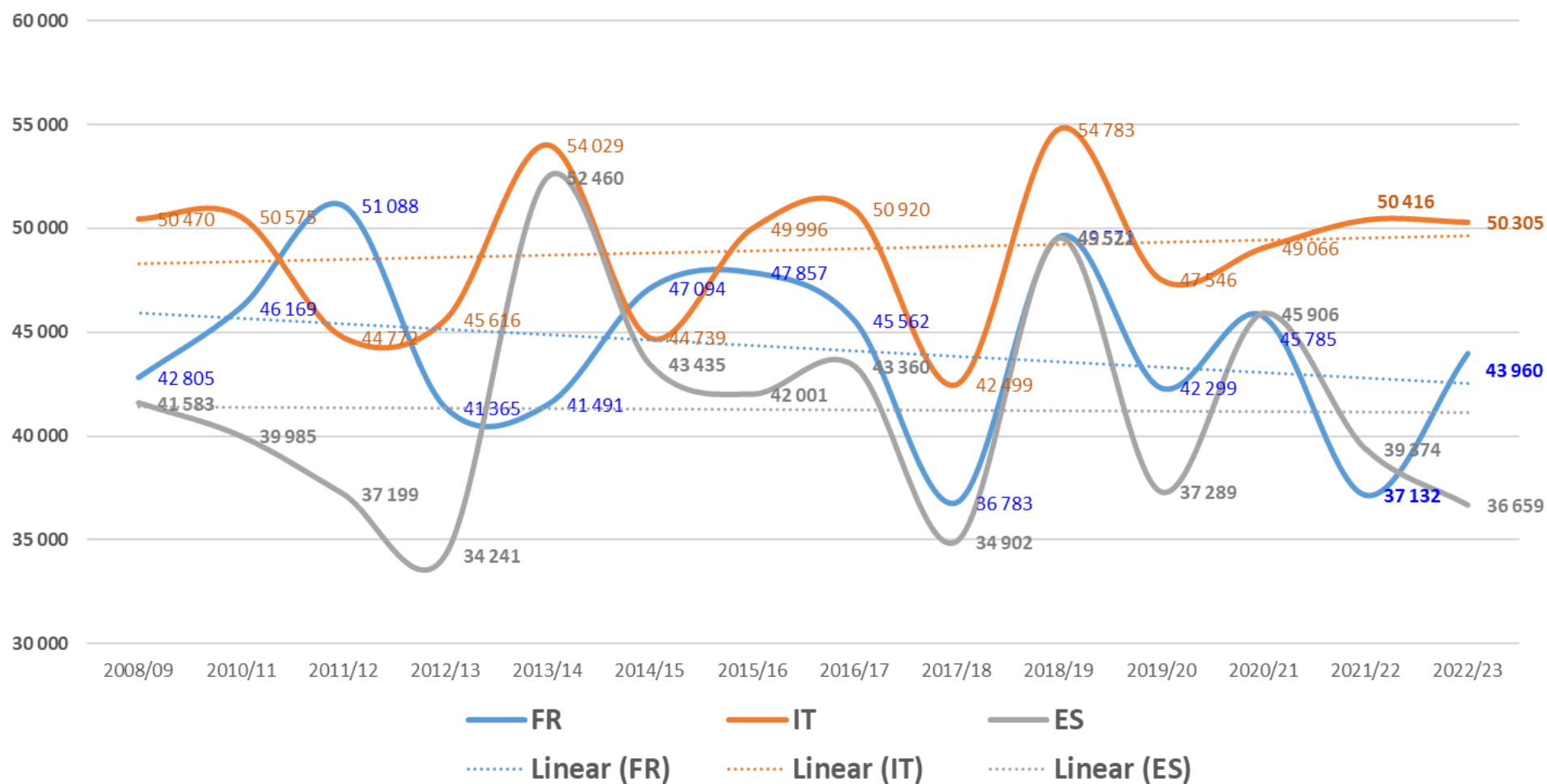
Evolution EU - 27 Wine and Must Production

Wine Production - Estimation 2022/23 - October 2022 - in 1000 HI

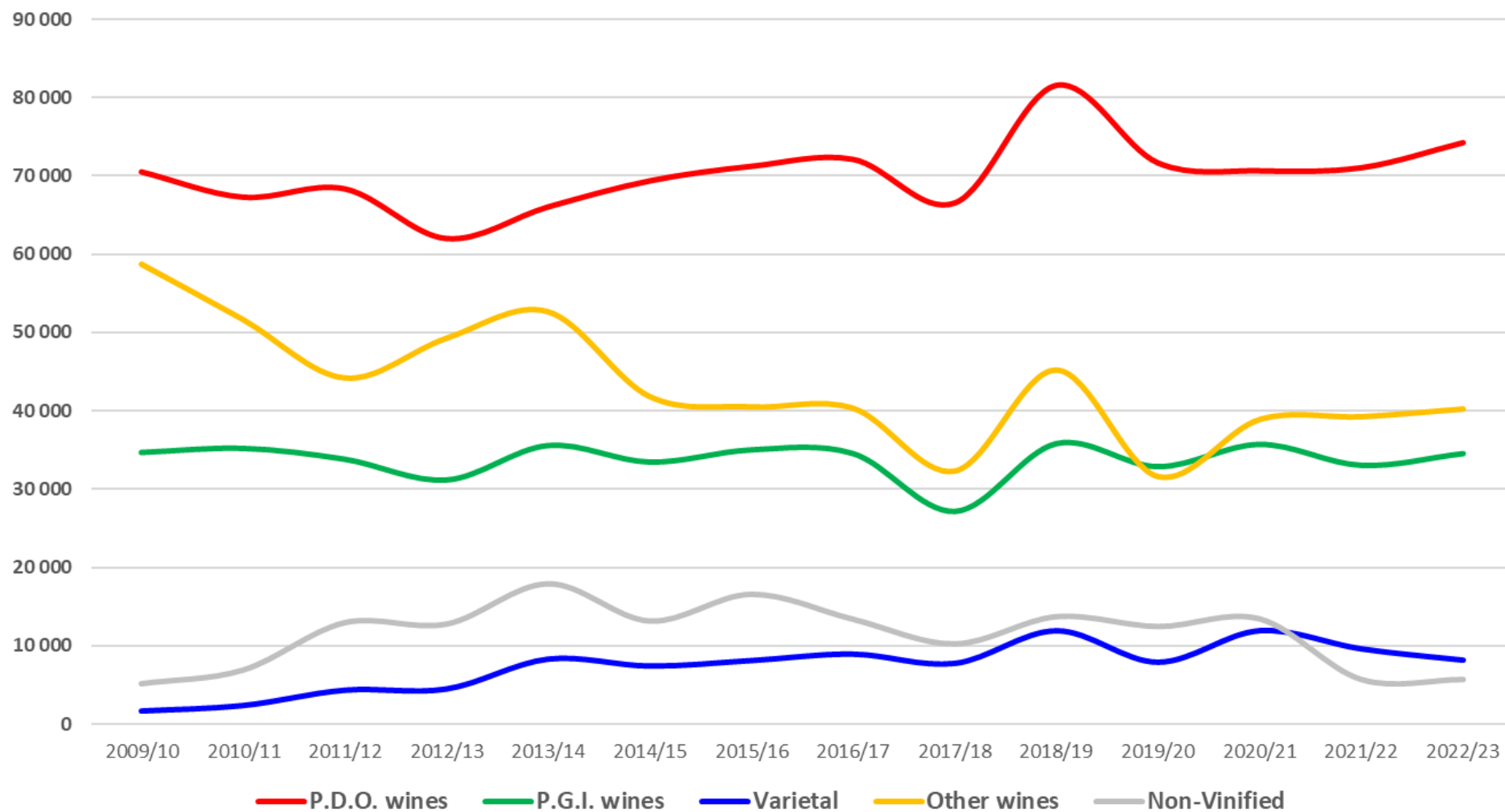
Source: <https://agridata.ec.europa.eu/extensions/DashboardWine/WineProduction.html>



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



EU 27 - Wine production evolution - per category - October 2022 - in 1000 HI





Opening Stocks 2022/2023: 173 Mio HI (-1%)



Wine production & opening stocks
Directorate-General for Agriculture and Rural Development

Marketing Year

Member State

Category

Opening Stock

Total

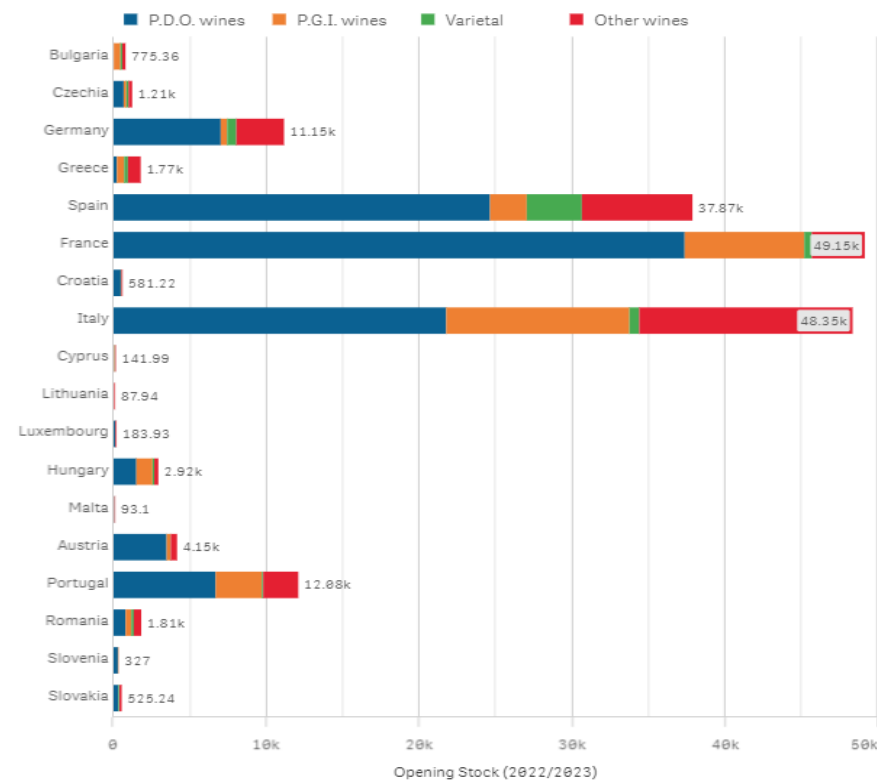
App update:
07/11/2022

All MS > All Category Groups > All Categories

Marketing Year: 2022/2023

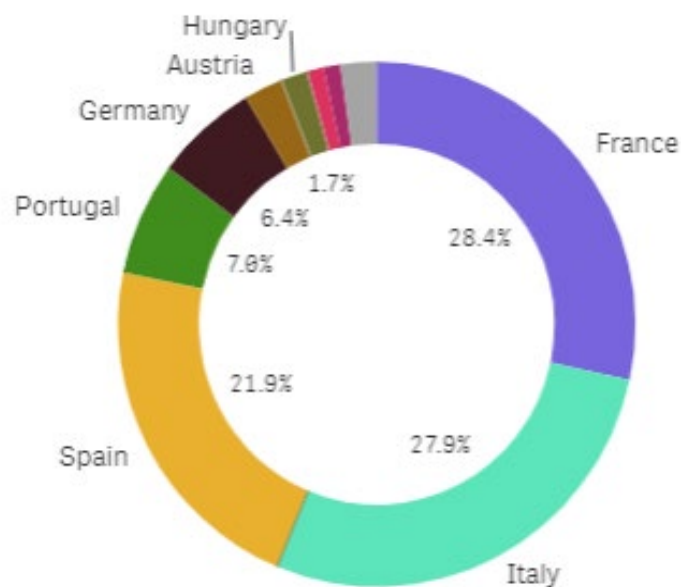
	Total Opening Stock (1000 hl)	Vinified				
		Total	P.D.O. wines	P.G.I. wines	Varietal	Other wines
Totals	173 186	173 186	105 319	28 537	6 390	32 939
Bulgaria	775	775	15	435	116	210
Czechia	1 212	1 212	656	174	151	231
Germany	11 149	11 149	7 008	421	603	3 117
Greece	1 770	1 770	218	475	243	833
Spain	37 875	37 875	24 630	2 403	3 607	7 235
France	49 151	49 151	37 365	7 828	493	3 464
Croatia	581	581	472	1	38	70
Italy	48 353	48 353	21 766	11 987	641	13 959
Cyprus	142	142	19	40	31	53
Lithuania	88	88	10	14	4	59
Luxembourg	184	184	115	1	1	67
Hungary	2 924	2 924	1 489	1 060	113	263
Malta	93	93	36	12	8	37
Austria	4 149	4 149	3 470	238	27	414
Portugal	12 083	12 083	6 674	3 030	86	2 292
Romania	1 806	1 806	784	376	163	483
Slovenia	327	327	283	35	3	7
Slovakia	525	525	311	6	63	146

Production by Category and MS

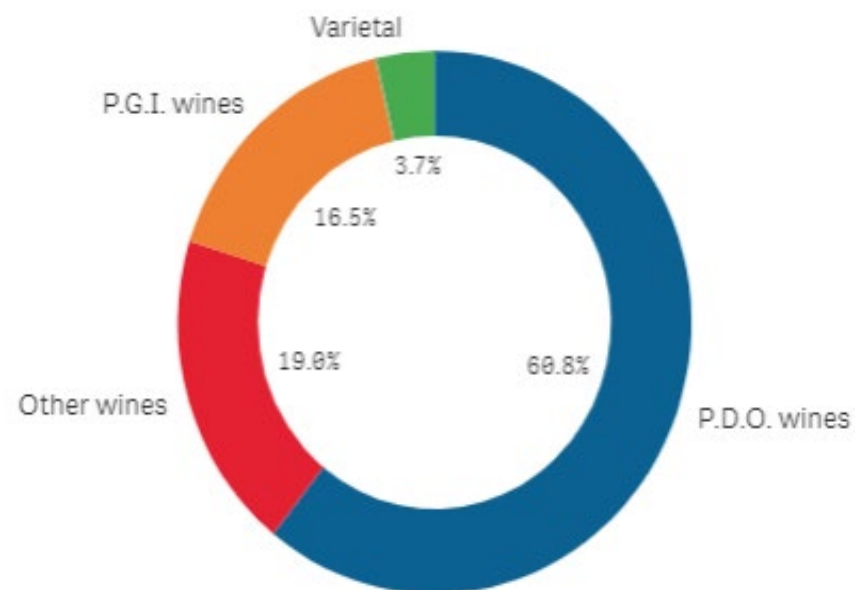


Opening Stocks 2022/23 – per MS and category

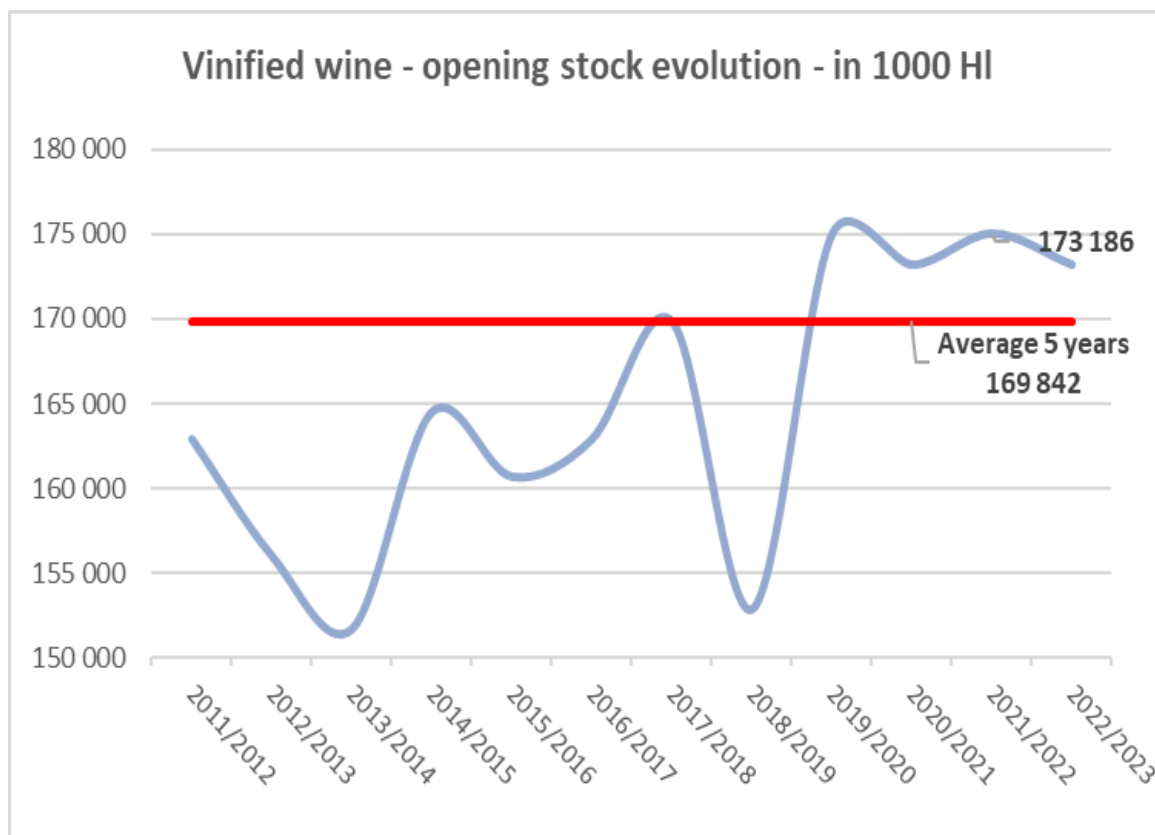
Opening Stock by MS



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%
2021/2022	175 022	1%
2022/2023	173 186	-1%
Average 5 years	169 842	2%



Exports - volumes 2021/22: 32,1MioHl: +12% (+3,3 MioHl, historical record 2020/21 beaten, but increasing trend going downwards since August 2022)



Wine trade

Directorate-General for Agriculture and Rural Development

SELECT VIEW: [Annual Trade Data](#)

EU Composition: Flow: Measure:

Latest update: 13/10/2022 09:58:58

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

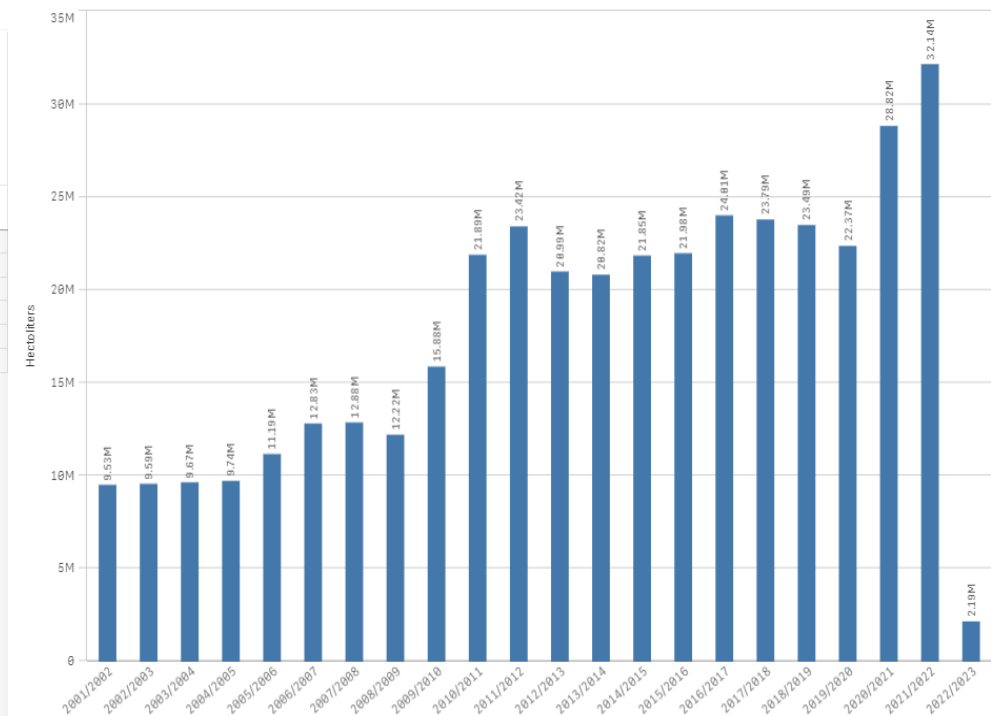
Annual EU Trade, Quantity in hectoliters

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.

	2022/2023	2021/2022	2020/2021	2019/2020	2018/2019	2017/2018	2016/2017
Total Product Categories	2 190 701	32 137 620	28 816 323	22 370 404	23 491 668	23 787 822	24 009 705
• PDO Wines	1 114 608	17 594 514	15 445 299	11 475 546	11 776 955	11 602 798	10 941 249
• Other Wines	527 726	6 106 811	5 703 387	5 126 689	5 750 246	5 775 213	6 719 982
• PGI Wines	382 961	5 889 176	5 544 557	4 413 336	4 559 660	5 126 620	5 160 476
• Varietal Wines	153 799	2 361 058	1 830 471	1 100 136	1 159 895	1 084 441	983 789
• Wine Must	11 696	186 061	292 608	254 698	244 912	198 750	204 210

Annual EU Trade, Quantity in hectoliters

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





Exports – values 2021/22: 17,2 Bio€: +23% (+3,2 Bio€ - new historical record, but increasing trend going downwards as for volumes)



Wine trade

Directorate-General for Agriculture and Rural Development

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EU Composition: Flow: Measure:

Latest update: 13/10/2022 09:58:58

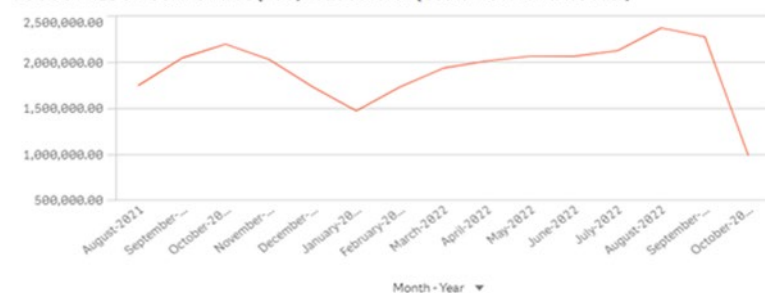
Product Category: Product Group: Member State: Partner: Marketing Year: Month: [Reset Selections](#) [Download to PDF](#)

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.

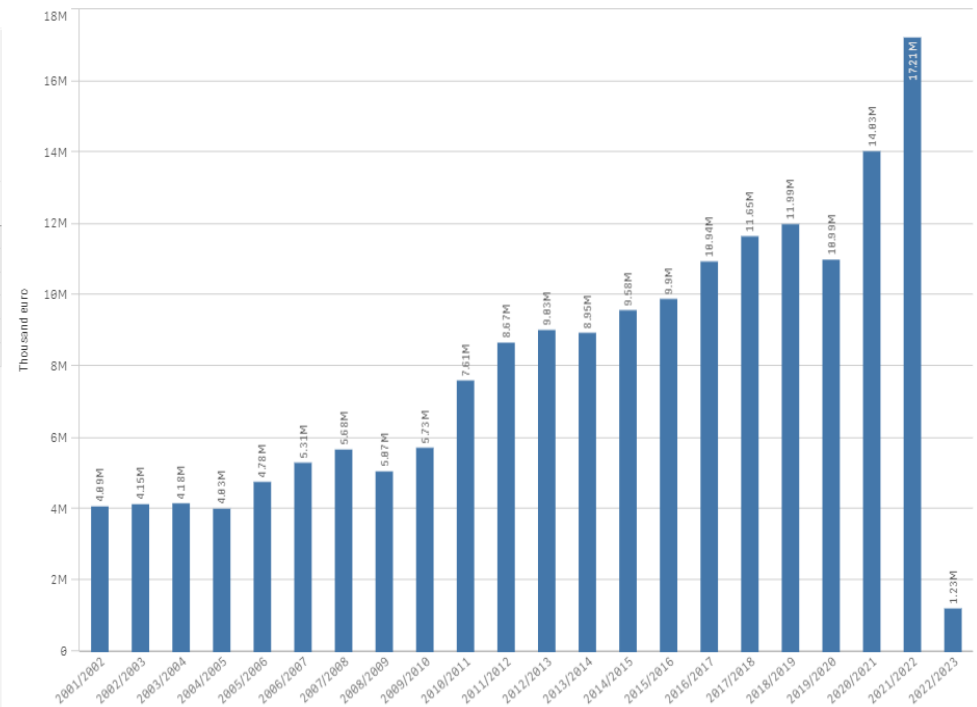
	2022/2023	2021/2022	2020/2021	2019/2020	2018/2019	2017/2018	2016/2017
Total Product Categories	1 233 765	17 212 237	14 027 626	10 993 611	11 988 929	11 649 558	10 943 650
• PDO Wines	958 339	13 559 292	10 863 460	8 390 765	9 252 227	8 824 707	8 194 649
• PGI Wines	134 963	1 964 556	1 758 150	1 460 678	1 495 819	1 599 221	1 604 028
• Other Wines	99 169	1 101 596	938 187	828 176	902 343	893 420	863 603
• Varietal Wines	38 319	539 311	403 091	263 870	281 121	274 424	230 433
• Wine Must	2 976	47 482	64 738	50 122	57 419	57 785	50 937

GOODS FREE ON BOARD value (FOB) in 1000euro : (Custom Surveillance data)



Annual EU Trade, Value in thousand euro

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

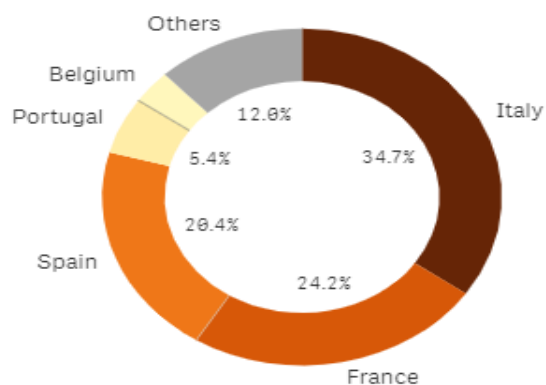




Exports 2021/22 – per MS and partners

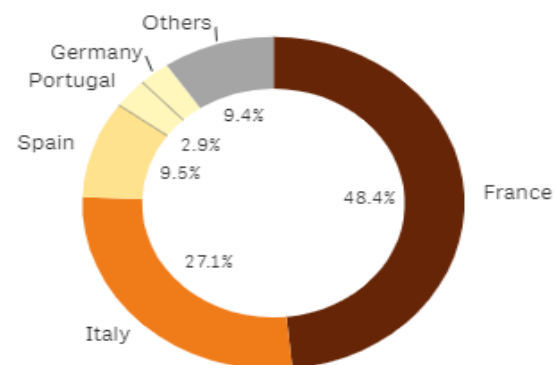
EU Trade by Member States, Quantity in hectoliters

EU, flow: EXPORT, all product categories, all product groups, all partners, Marketing Year: 2021/2022, all months



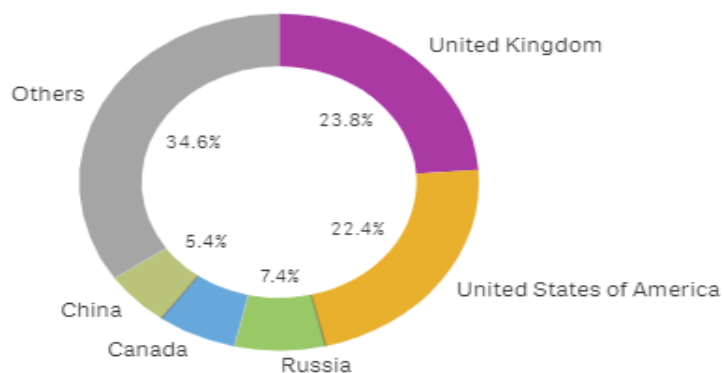
EU Trade by Member States, Value in thousand euro

EU, flow: EXPORT, all product categories, all product groups, all partners, Marketing Year: 2021/2022, all months



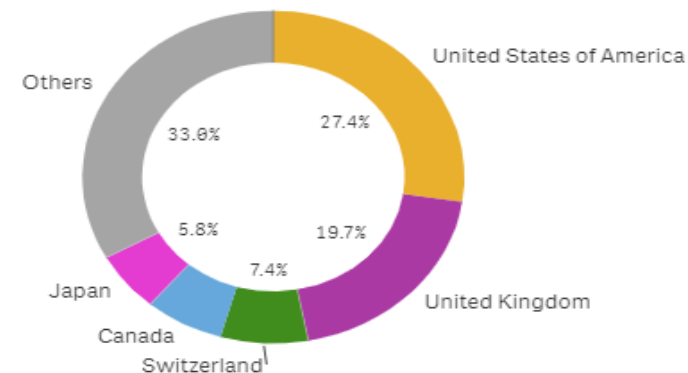
EU Trade by Partners, Quantity in hectoliters

EU, flow: EXPORT, all product categories, all product groups, all partners, Marketing Year: 2021/2022, all months



EU Trade by Partners, Value in thousand euro

EU, flow: EXPORT, all product categories, all product groups, all partners, Marketing Year: 2021/2022, all months





Imports: volumes 2021/22: 6,9 MioHl: -3% (-200 000Hl, stability of imported volumes, impact of Brexit assimilated)



Wine trade

Directorate-General for Agriculture and Rural Development

SELECT VIEW: **Annual Trade Data**

Latest update: **13/10/2022 09:58:58**

EU Composition Flow Measure

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

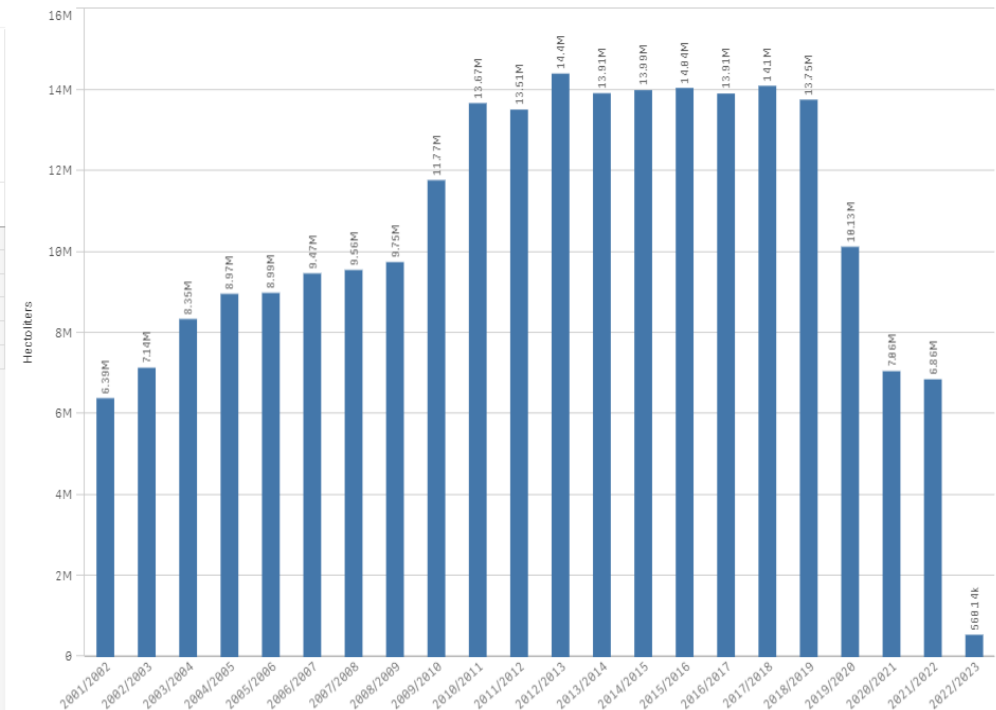
Annual EU Trade, Quantity in hectoliters

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.

	2022/2023	2021/2022	2020/2021	2019/2020	2018/2019	2017/2018	2016/2017
Total Product Categories	560 135	6 858 733	7 060 439	10 126 831	13 754 426	14 095 377	13 905 779
• Varietal Wines	355 381	3 947 678	4 200 165	4 647 466	4 395 209	4 480 397	4 303 251
• Other Wines	154 033	2 378 716	2 293 291	4 892 569	8 358 300	8 534 994	8 150 416
• PGI Wines	34 873	349 978	376 973	401 608	683 634	740 133	1 004 559
• PDO Wines	15 844	181 680	189 709	182 719	311 060	331 963	444 893
• Wine Must	4	682	300	2 468	6 223	7 890	2 659

Annual EU Trade, Quantity in hectoliters

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





Imports: values 2021/22: 1,8 Bio€: +13%(+213 Mio€)



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](#)

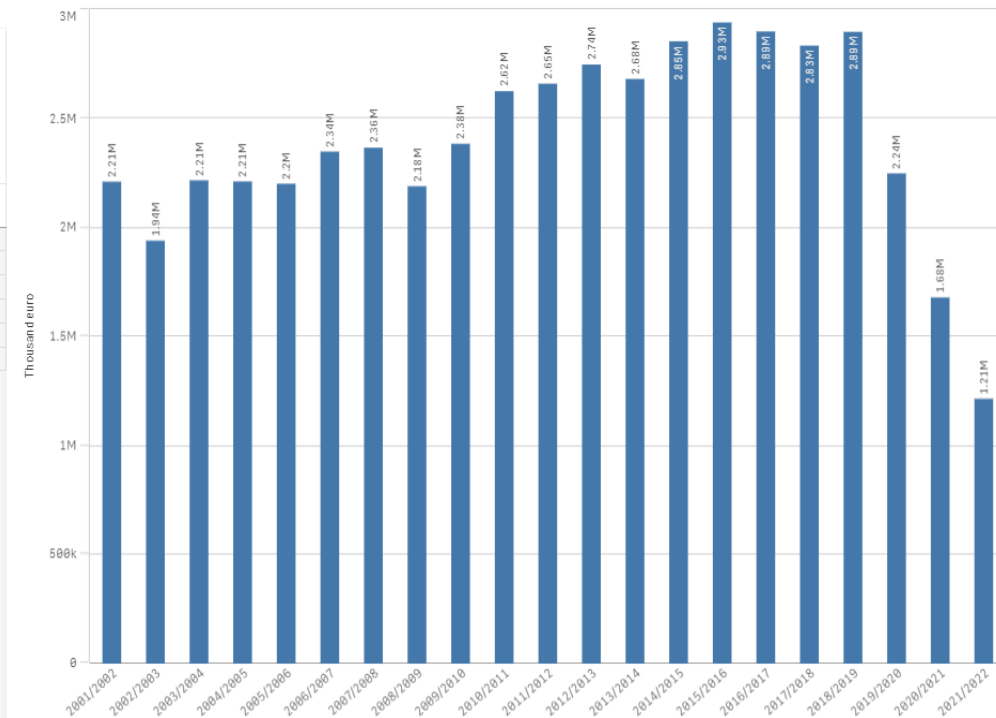
Annual EU Trade, Value in thousand euro

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	1 212 384	1 675 696	2 243 190	2 890 857	2 827 636	2 892 513	2 933 601	2 847 653
• 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

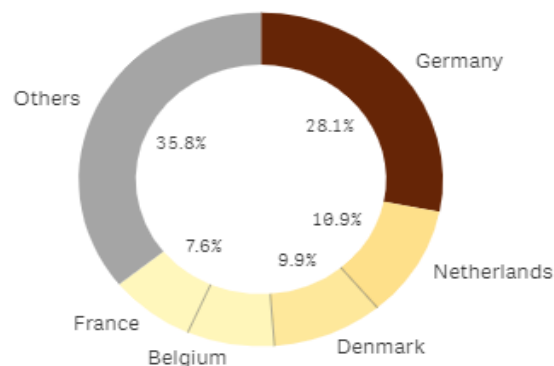
EU, flow: IMPORT, all product categories, all product groups, all partners, all Marketing Years, all months



Imports 2021/22 – per MS and partners

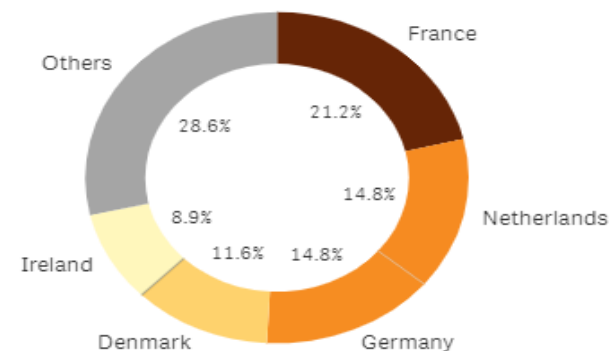
EU Trade by Member States, Quantity in hectoliters

EU, flow: IMPORT, all product categories, all product groups, all partners, Marketing Year: 2021/2022, all months



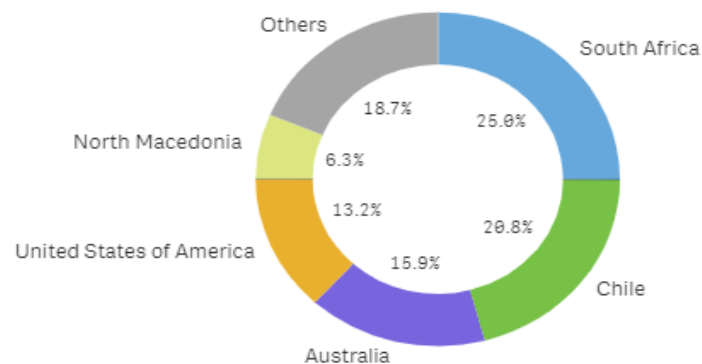
EU Trade by Member States, Value in thousand euro

EU, flow: IMPORT, all product categories, all product groups, all partners, Marketing Year: 2021/2022, all months



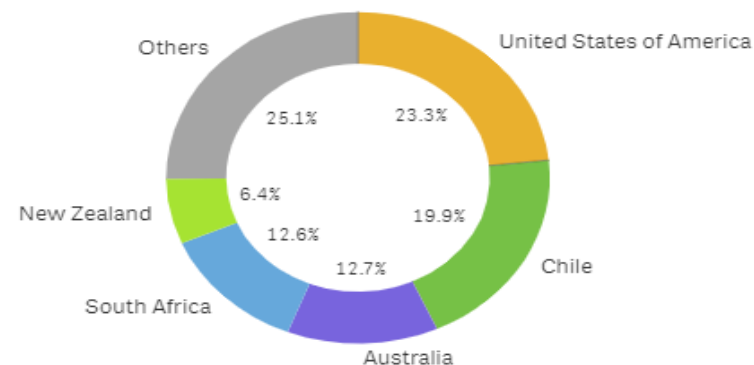
EU Trade by Partners, Quantity in hectoliters

EU, flow: IMPORT, all product categories, all product groups, all partners, Marketing Year: 2021/2022, all months



EU Trade by Partners, Value in thousand euro

EU, flow: IMPORT, all product categories, all product groups, all partners, Marketing Year: 2021/2022, 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