




Civil Dialogue Group for Wine

Wine market situation

14 May 2024

Content

Wine Market situation

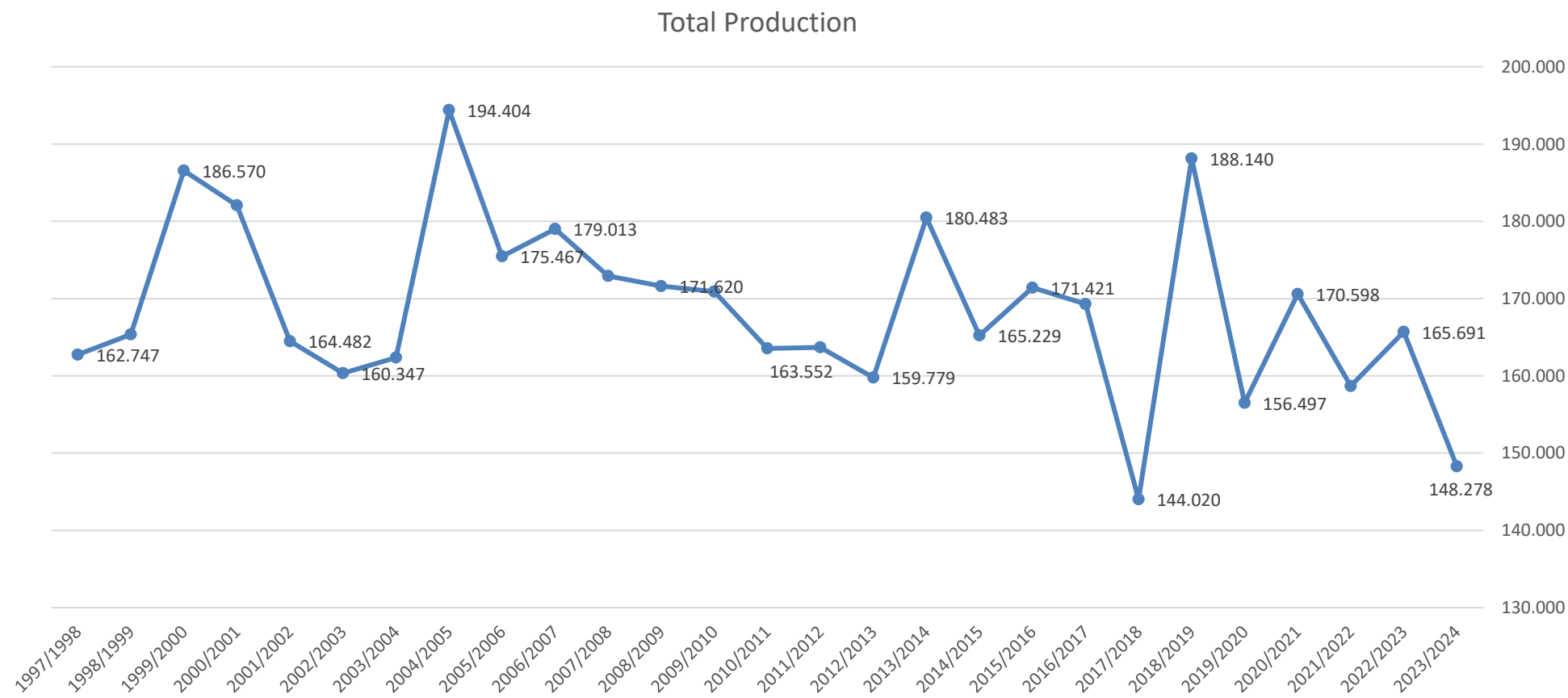
-  Production
-  Consumption
-  Exports / Imports
-  Stocks

Wine Market Observatory – summary of meetings

The background of the slide features a blurred image of a vineyard with green and yellowing leaves. In the foreground, three wine glasses are arranged on a wooden barrel. The leftmost glass contains white wine, the middle one contains rosé wine, and the rightmost one contains red wine. To the left of the glasses is a bunch of yellow grapes, and to the right is a bunch of purple grapes. The text "Wine Market situation" is overlaid in a bold, dark brown font, preceded by a small wine glass icon.

Wine Market situation

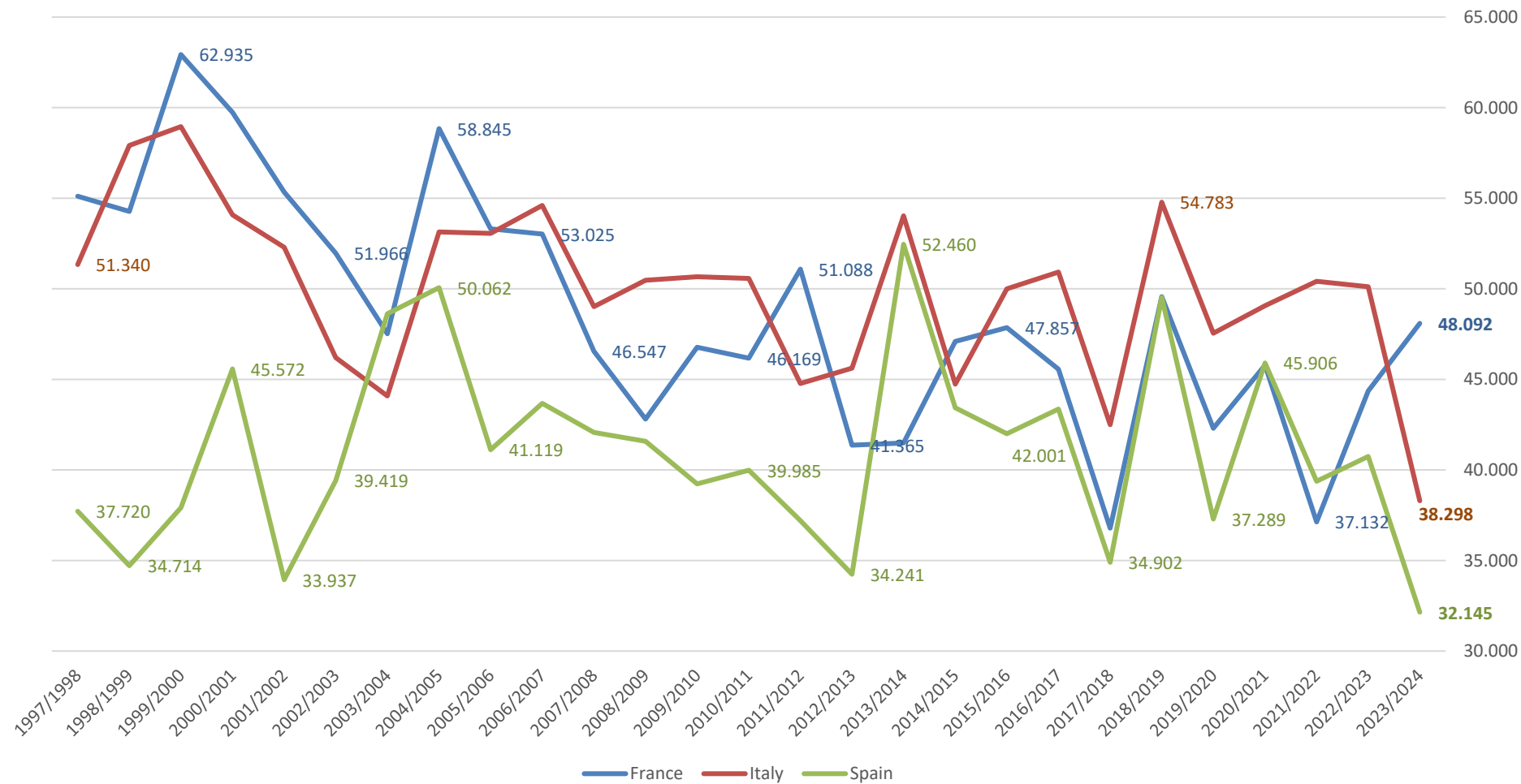
EU wine and must production evolution:



Source: agridata.ec.europa.eu

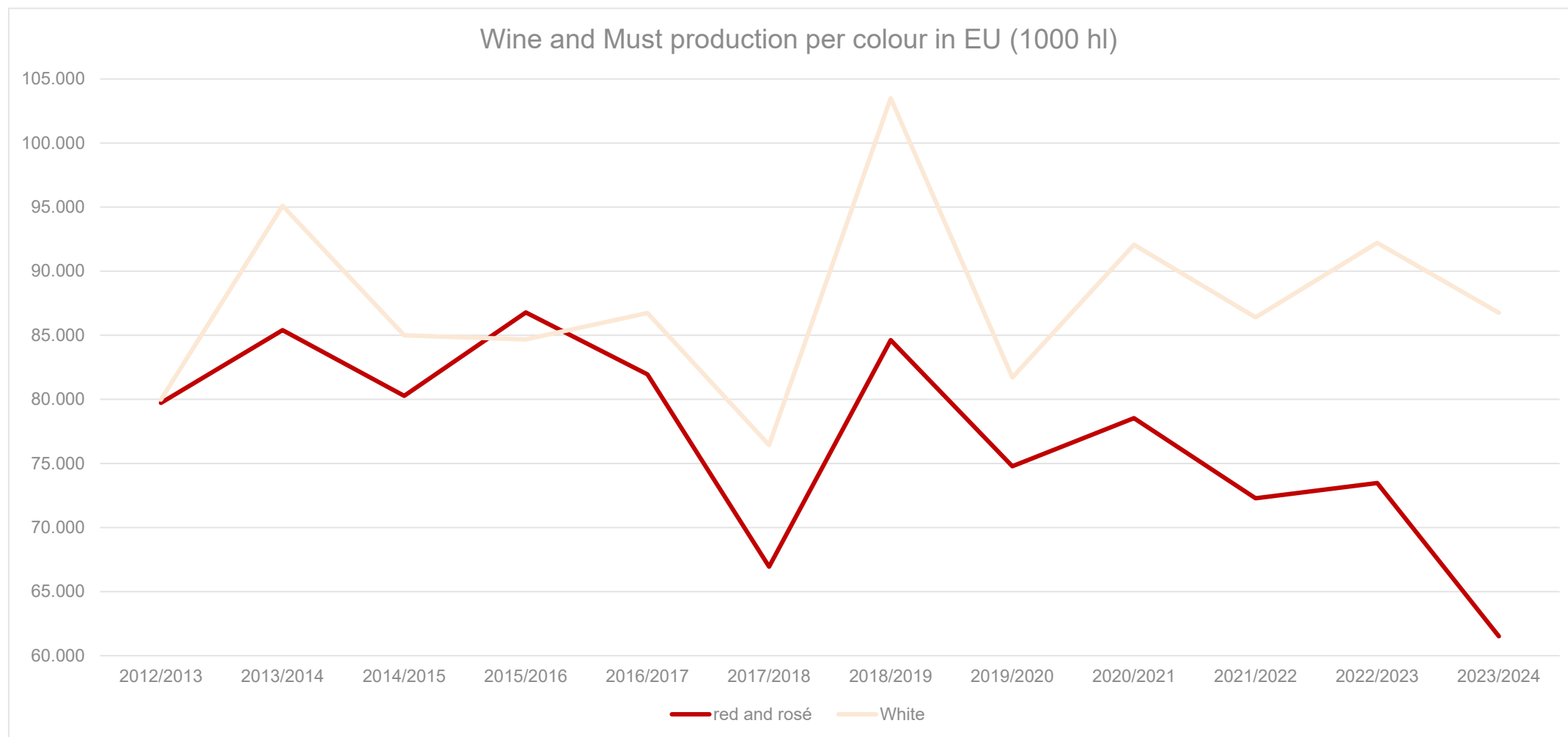
EU wine and must production evolution:

Total Wine and Must Production in France, Italy and Spain (1000 hl)



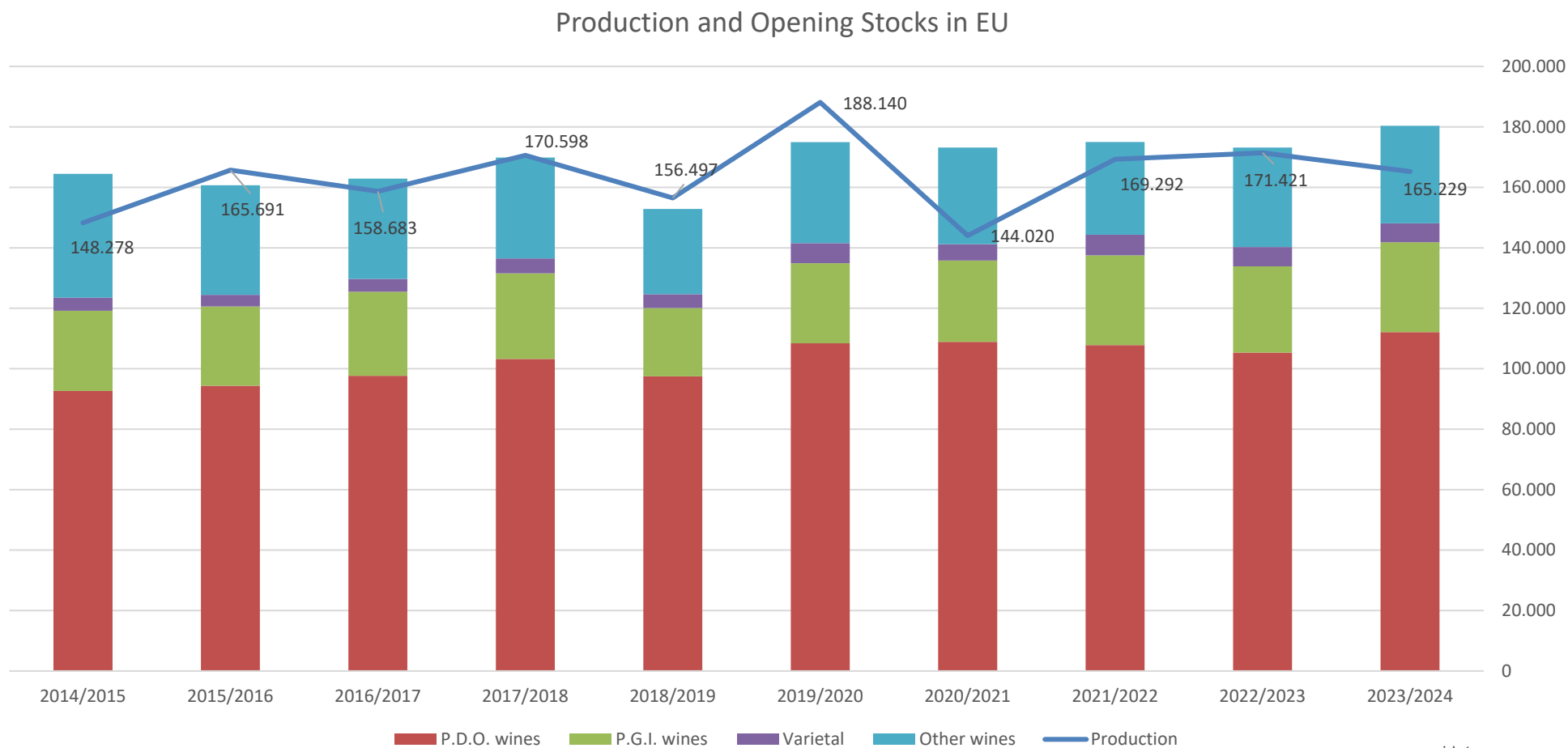
Source: agridata.ec.europa.eu

Wine and must production per colour in EU



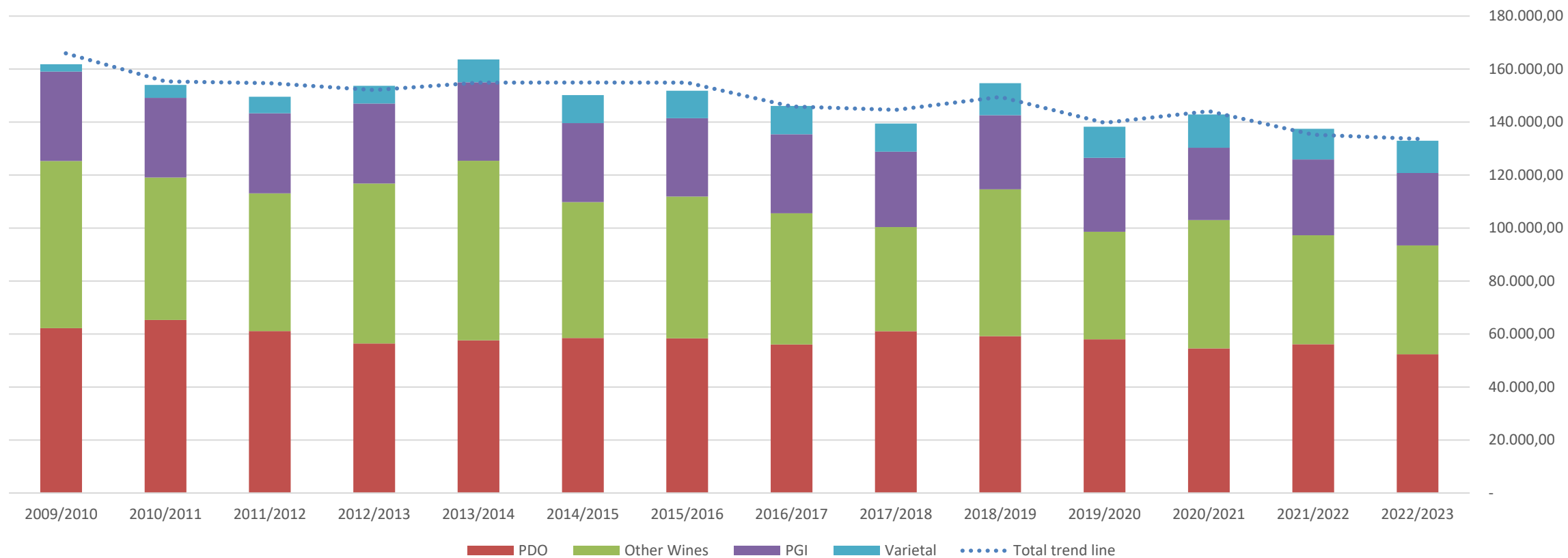
Source: agridata.ec.europa.eu

EU wine and must opening stocks:



agridata.ec.europa.eu

Apparent wine consumption EU (1000 hl)



agridata.ec.europa.eu



Exports

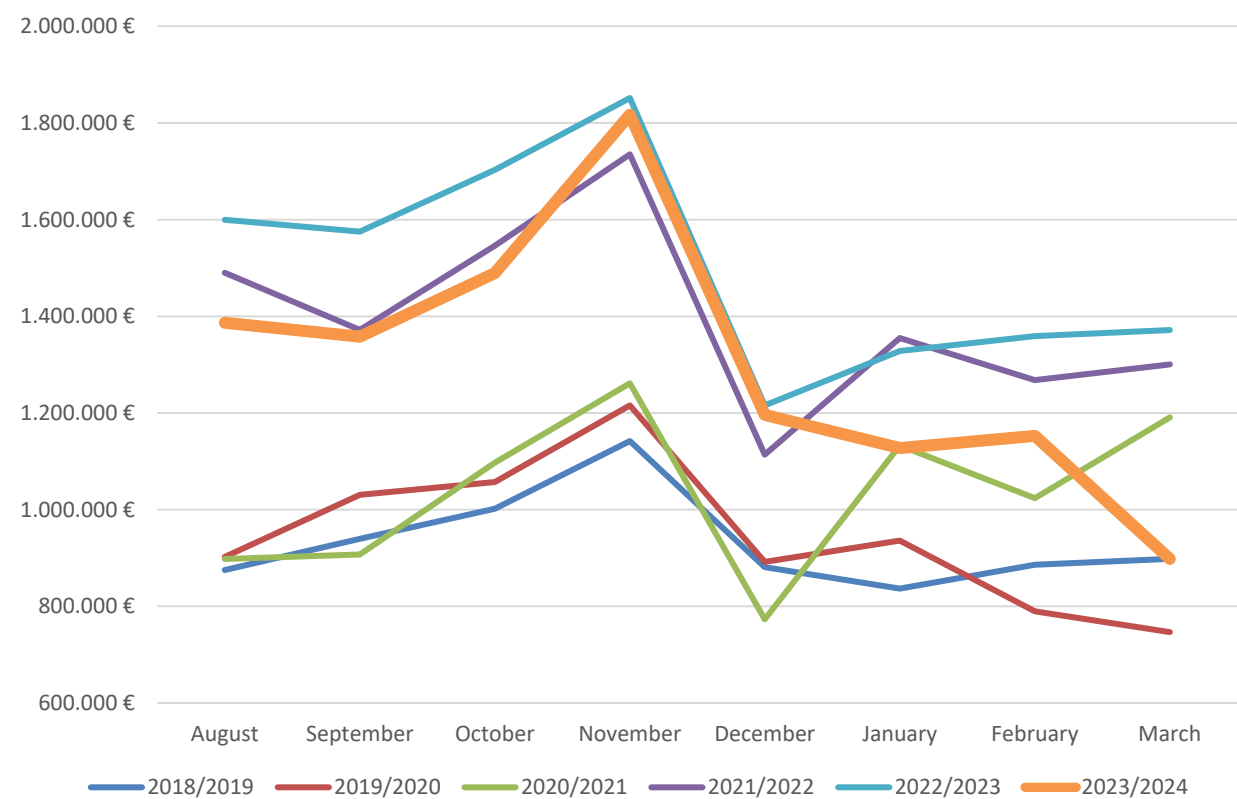


Source: agridata.ec.europa.eu

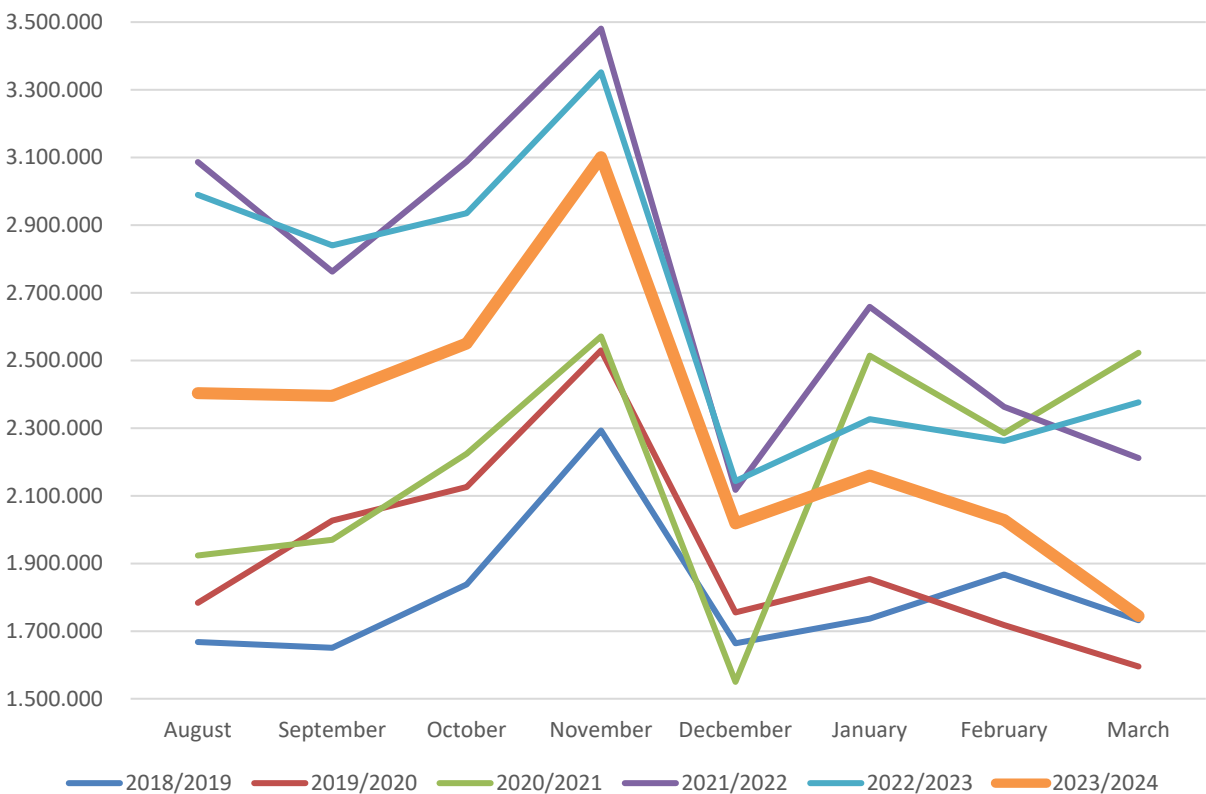


Exports

Exports in EUR



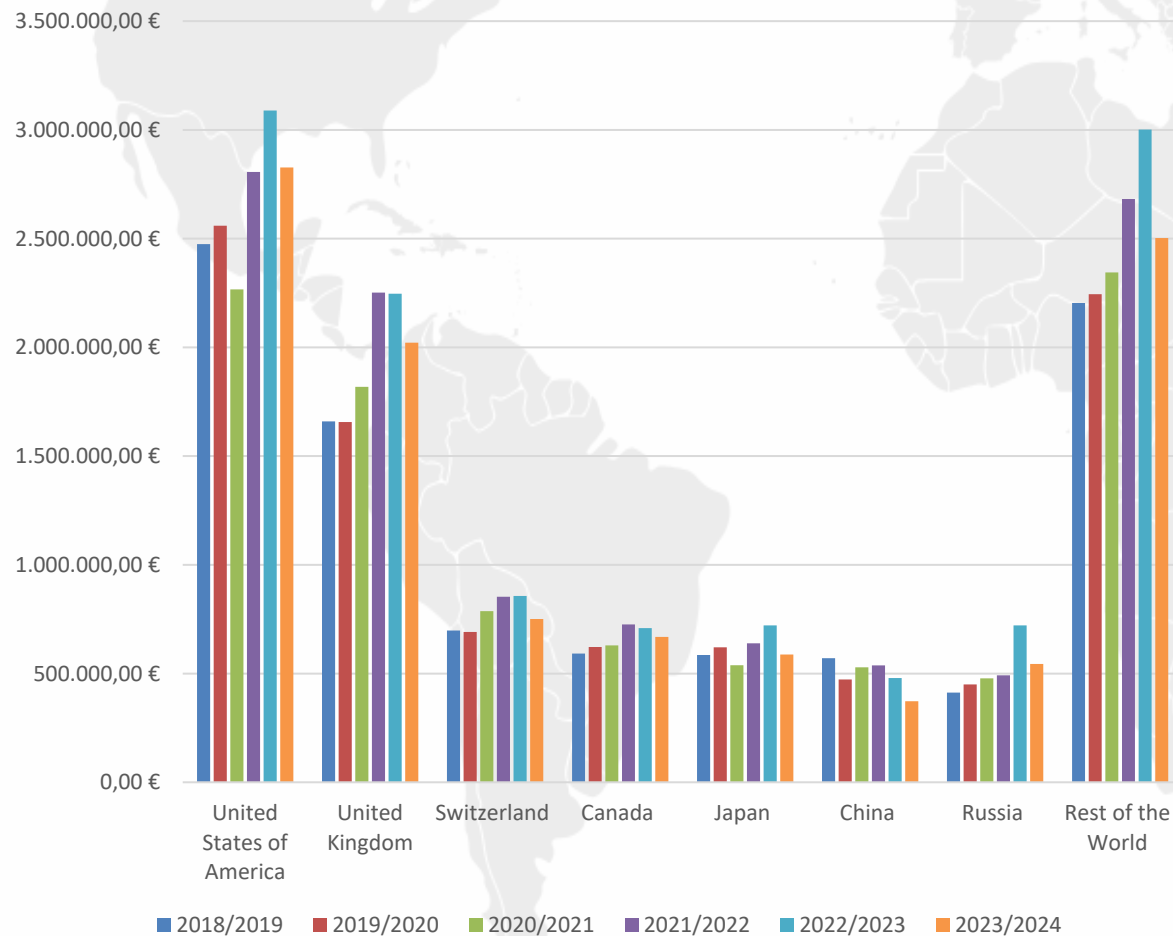
Exports in hl



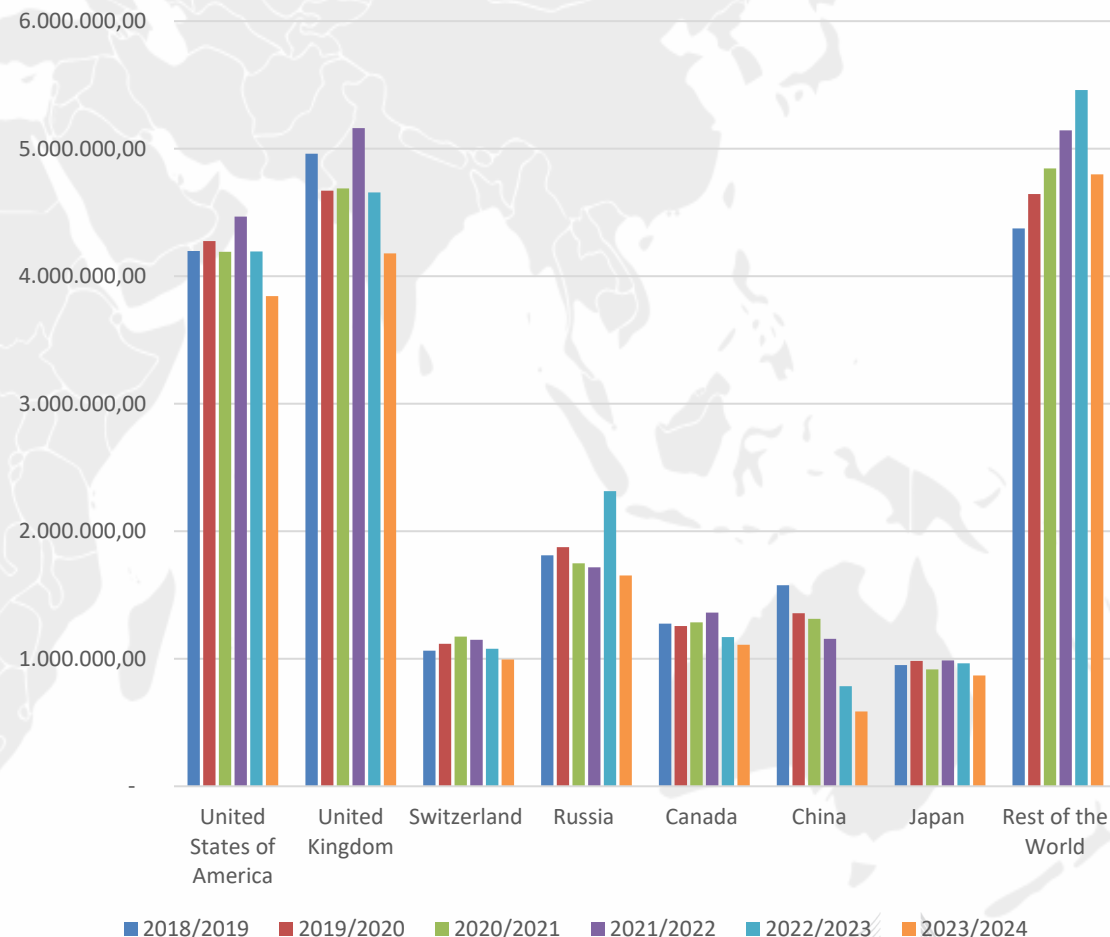
Source: Taxud

Top Destinations for European Wine

Main importing countries in 1000 EUR first 8 months of the marketing year



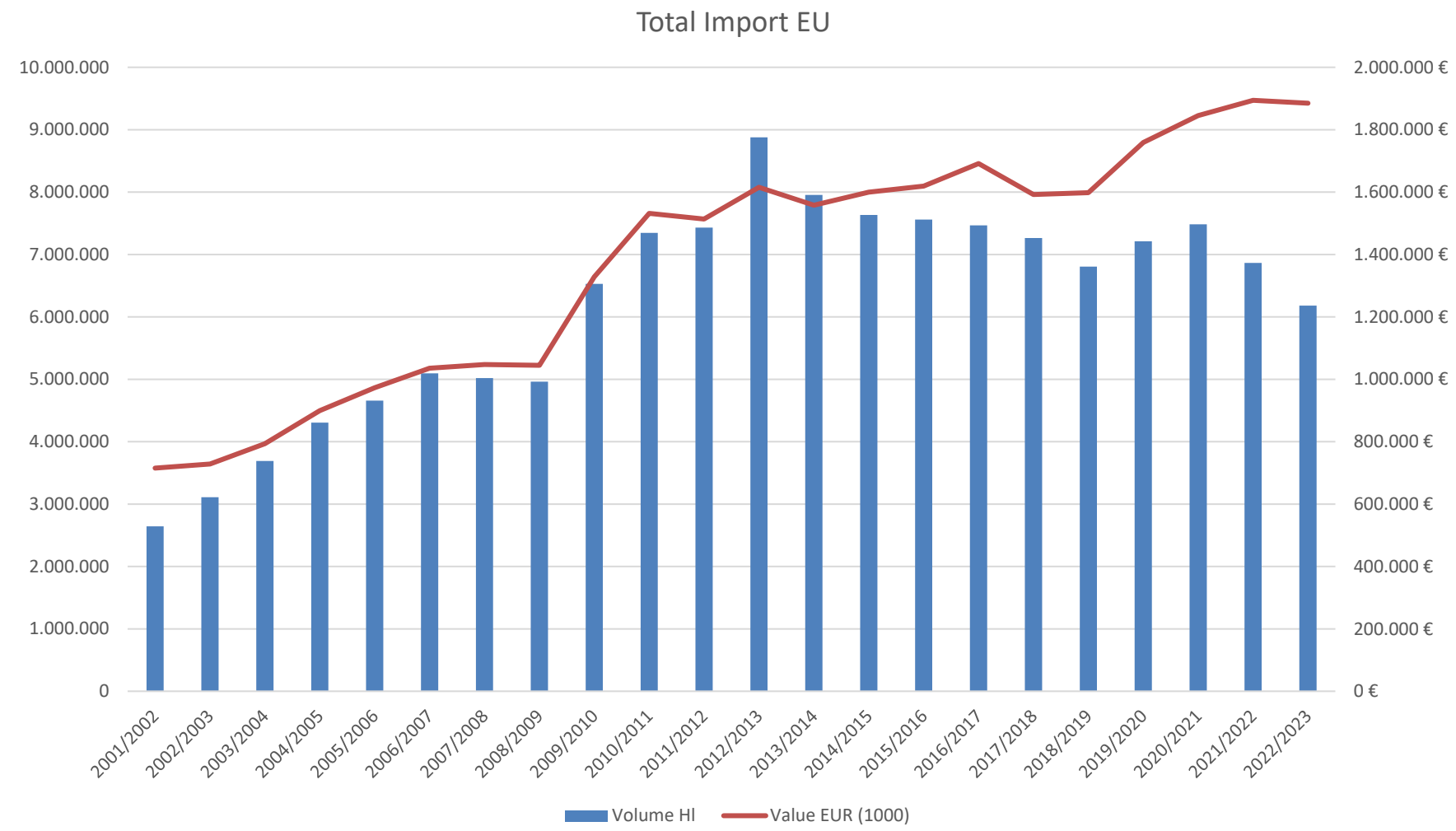
Main importing countries in hl first 8 month of the marketing year



Source: agridata.ec.europa.eu



Imports

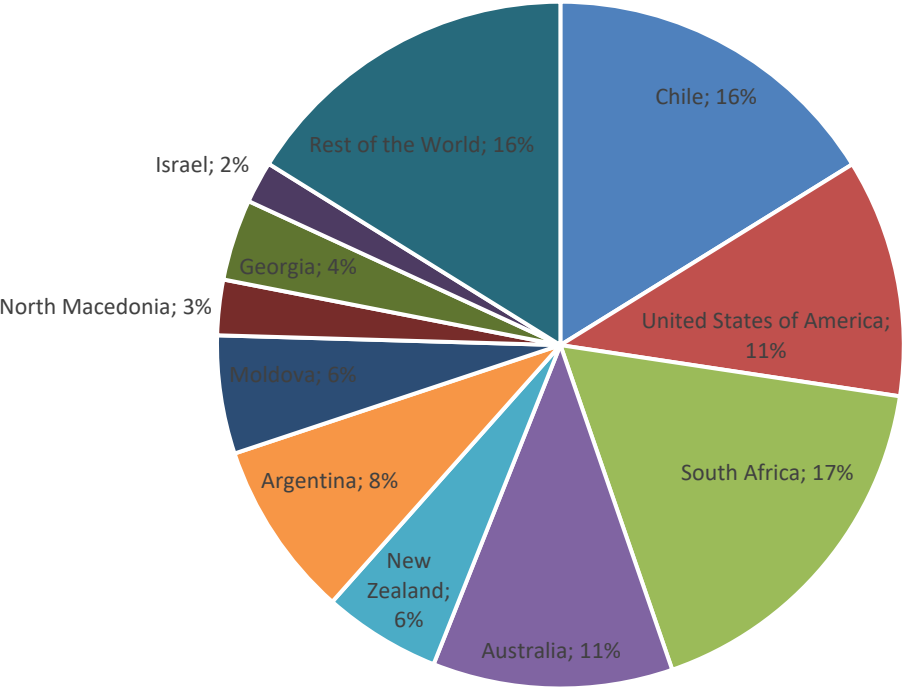


Source: agridata.ec.europa.eu

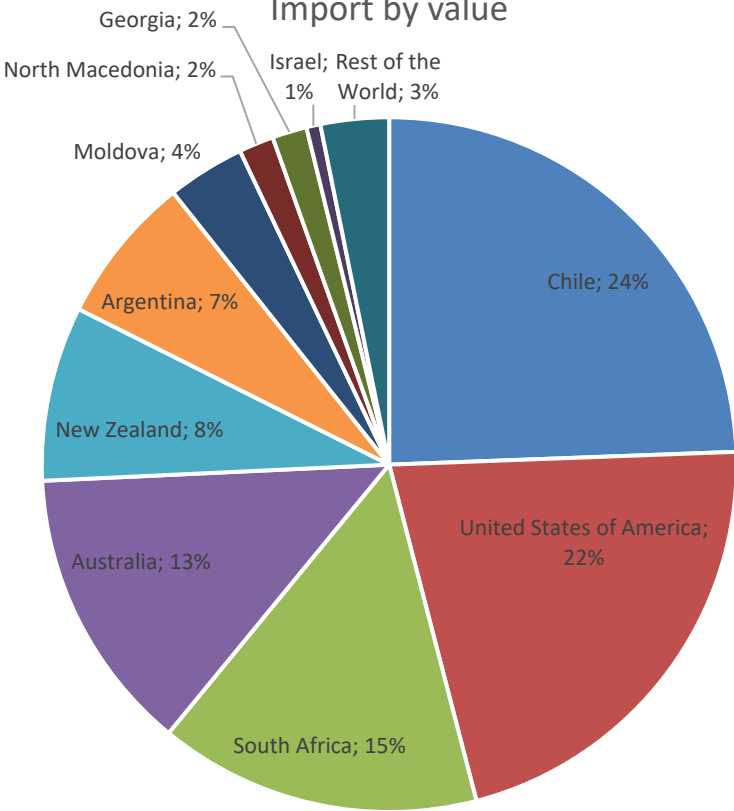


Imports by country of origin

Import by Volume



Import by value



Source: agridata.ec.europa.eu



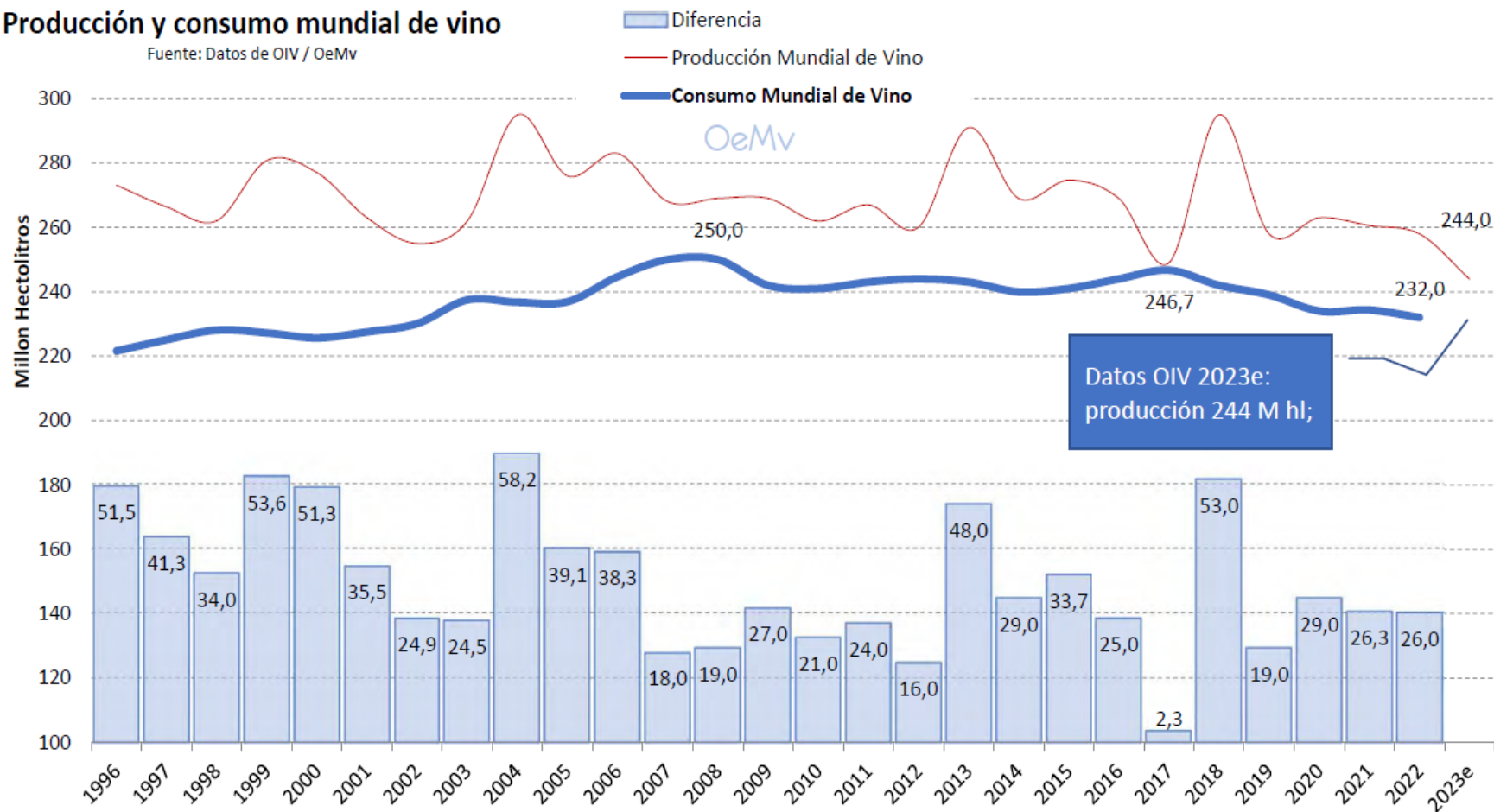
Key Points from the Second Special Market Observatory

Analysis of Long-Term Consumption and Trade Trends

1. Declining Wine Consumption

Producción y consumo mundial de vino

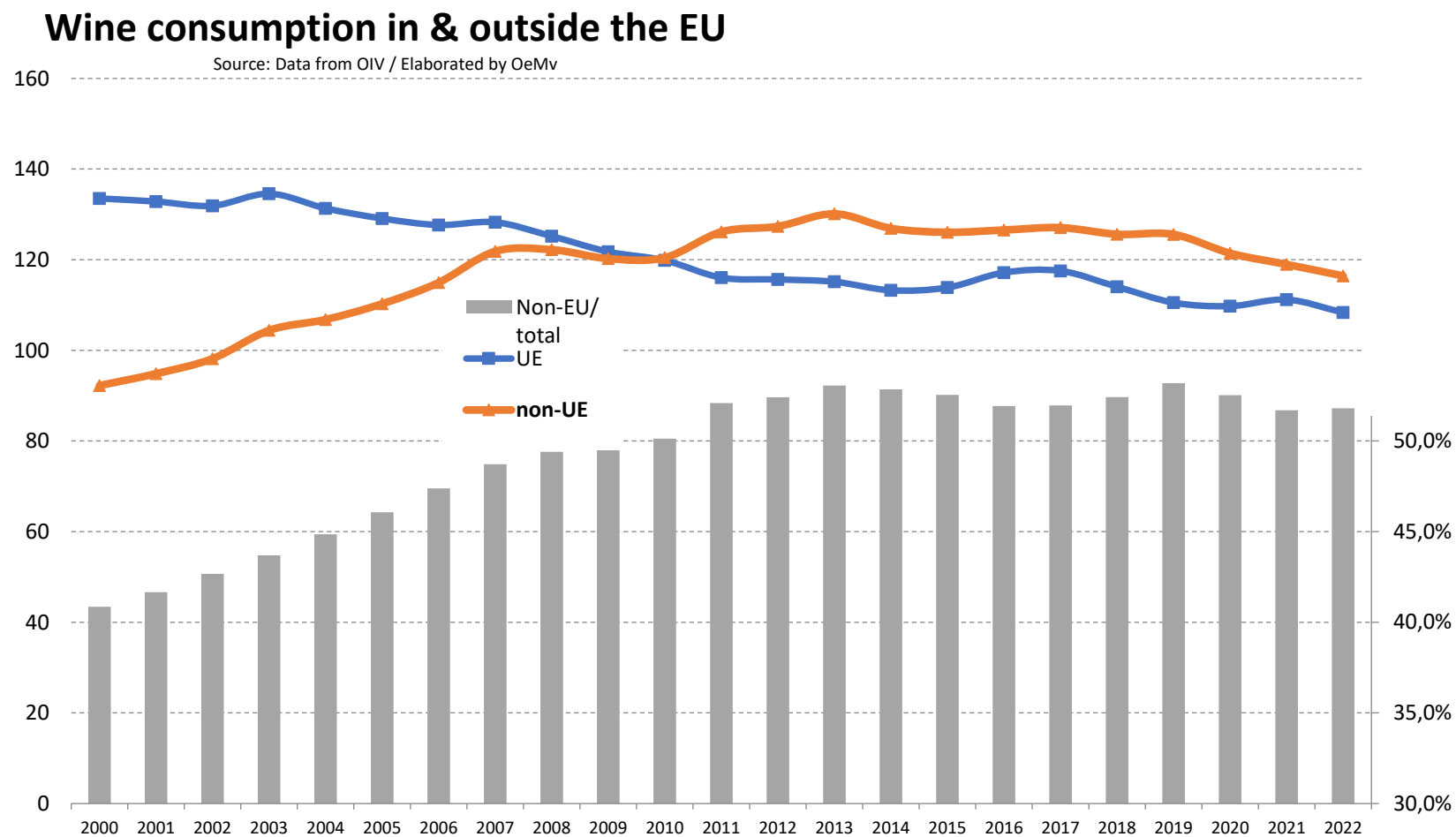
Fuente: Datos de OIV / OeMv



European
Commission

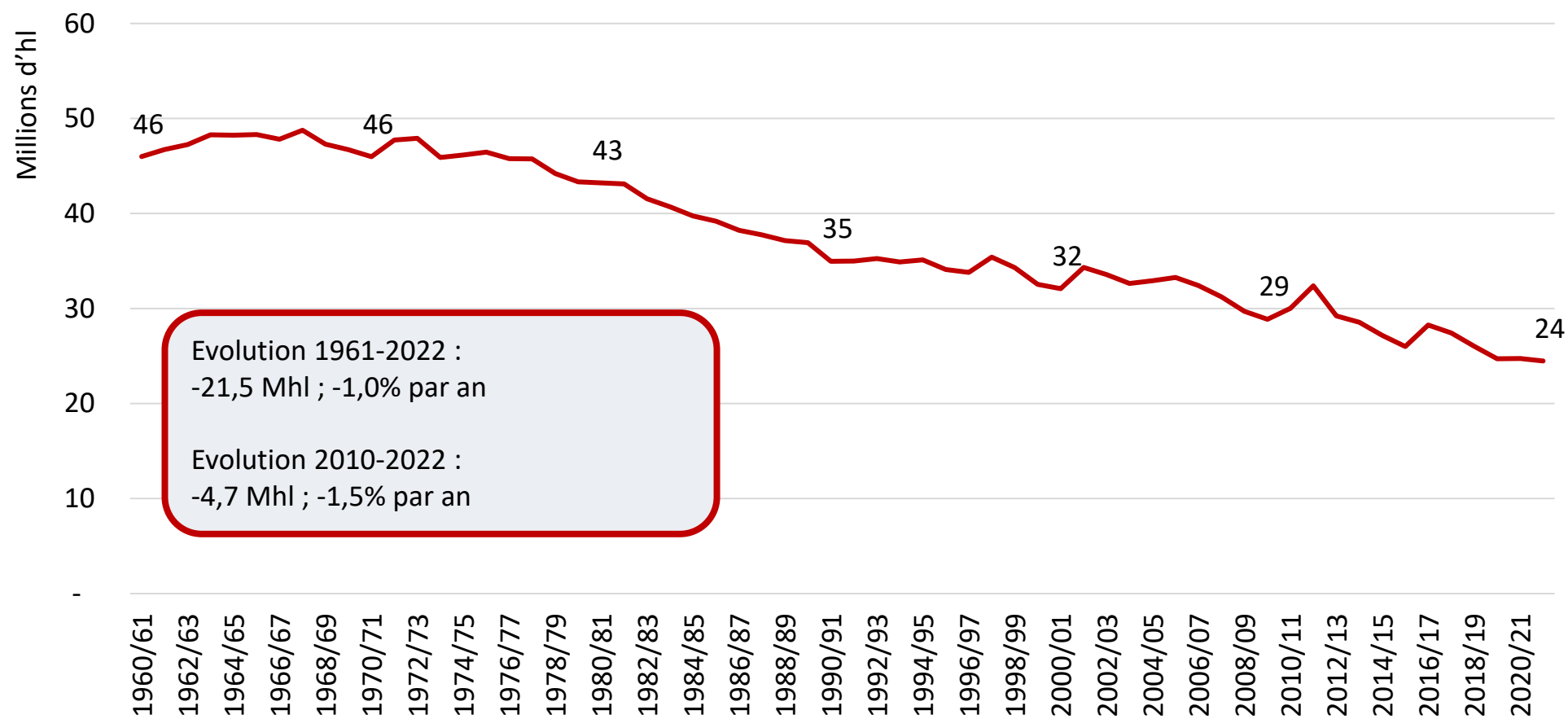
Source: from presentations in the MO 10 April

1. Declining Wine Consumption



Source: from presentations in the MO 10 April

1. Declining Wine Consumption – French market

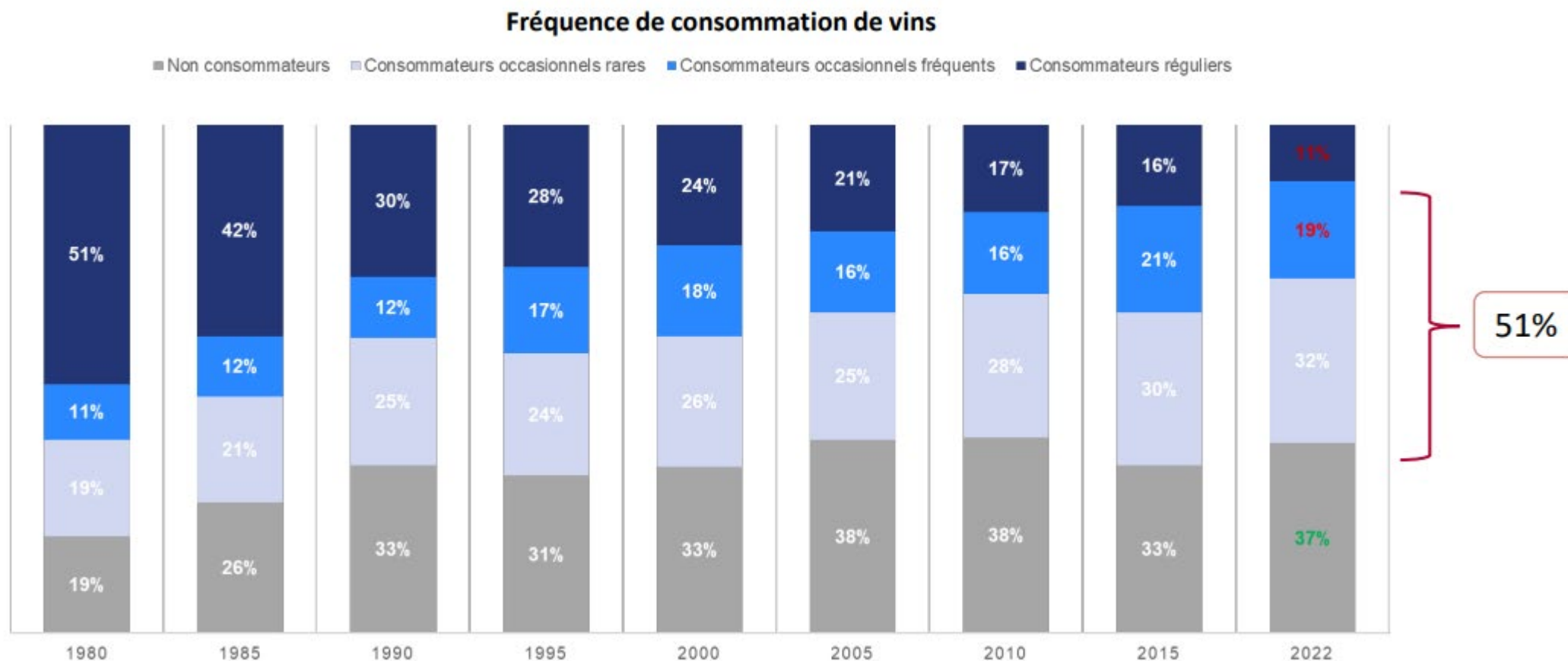


Source: from presentations in the MO 10 April



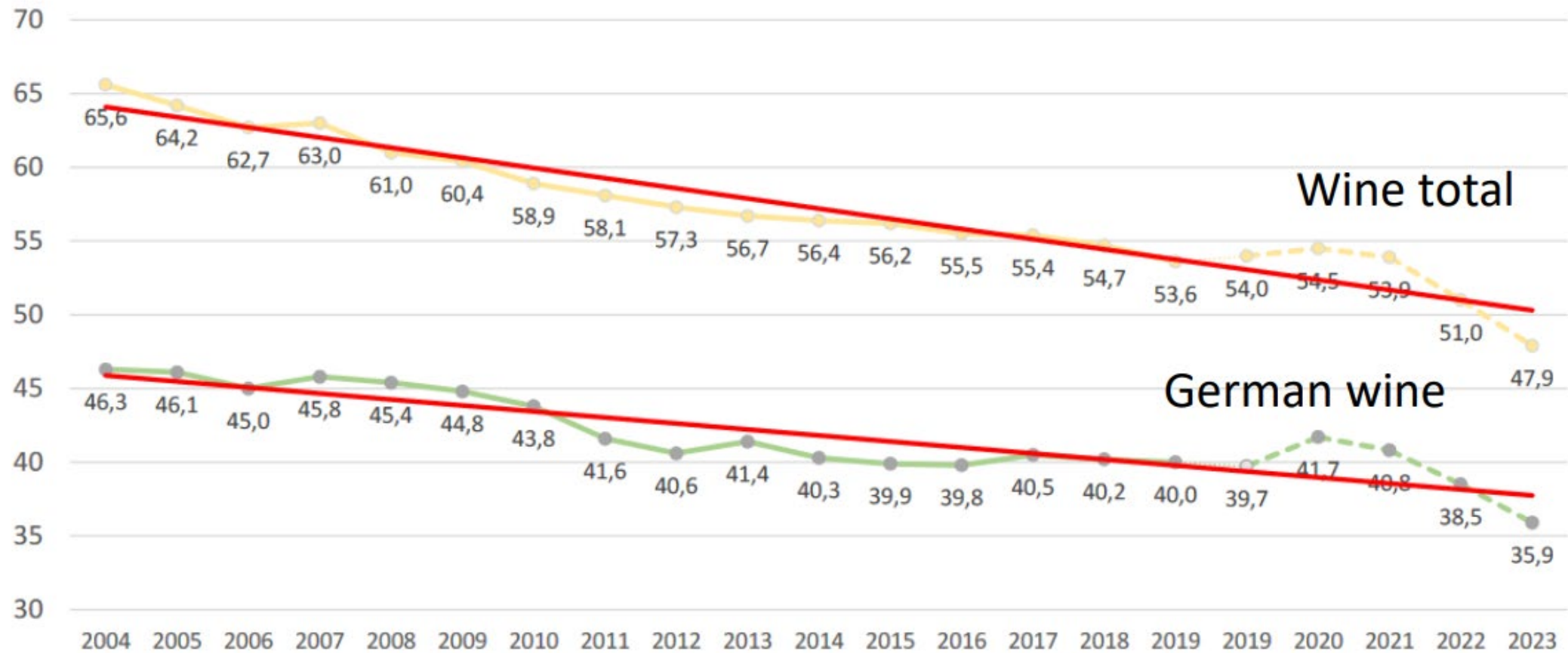
European
Commission

1. Declining Wine Consumption – French market



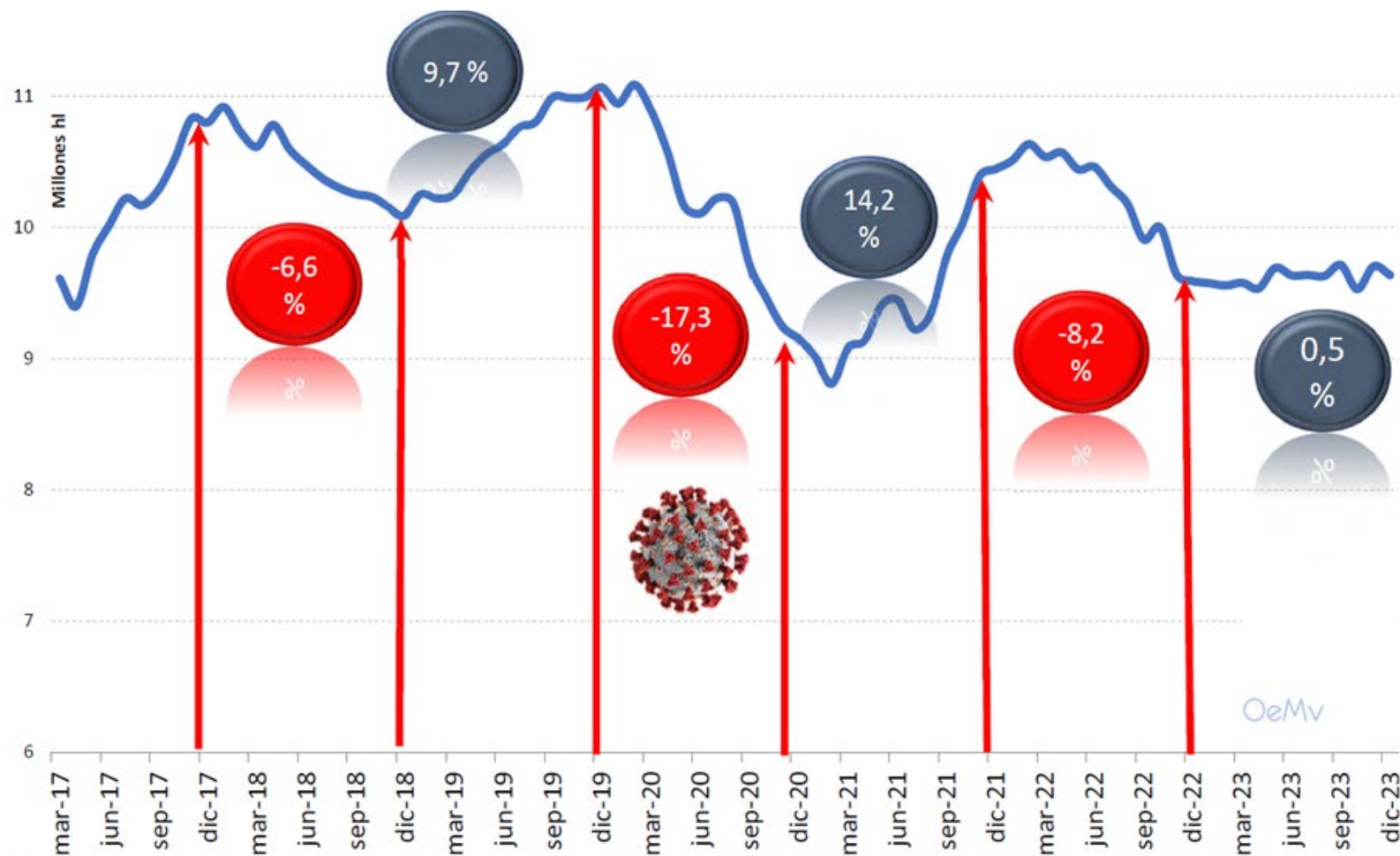
Source: from presentations in the MO 10 April

1. Declining Wine Consumption – German market



Source: from presentations in the MO 10 April

1. Declining Wine Consumption – Spanish market

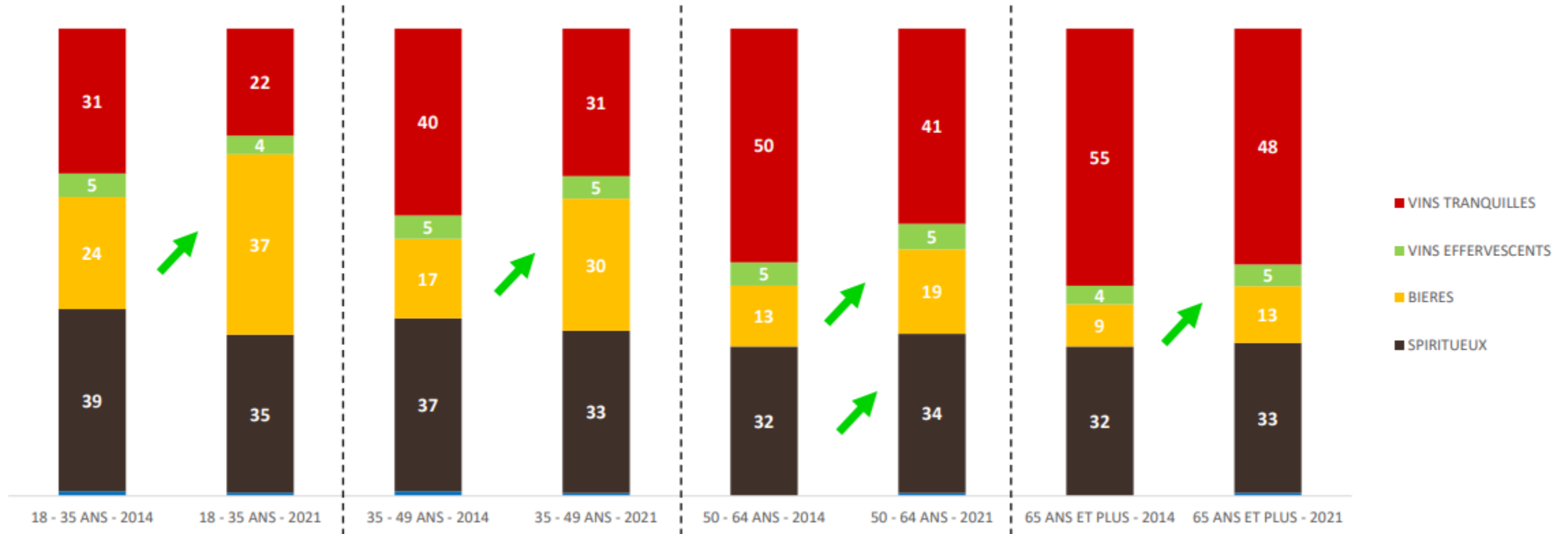


Source: from presentations in the MO 10 April



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Commission

2. Shifts in Consumer Preferences – French Market



Source: from presentations in the MO 10 April

2. Shifts in Consumer Preferences – New Consumption trends

Understanding the New Generations and Their Consumption Habits

Wines Without or
With Less Alcohol



Less Volume but
Growth in Premium
Wines



White and Sparkling
Wines Perform
Better



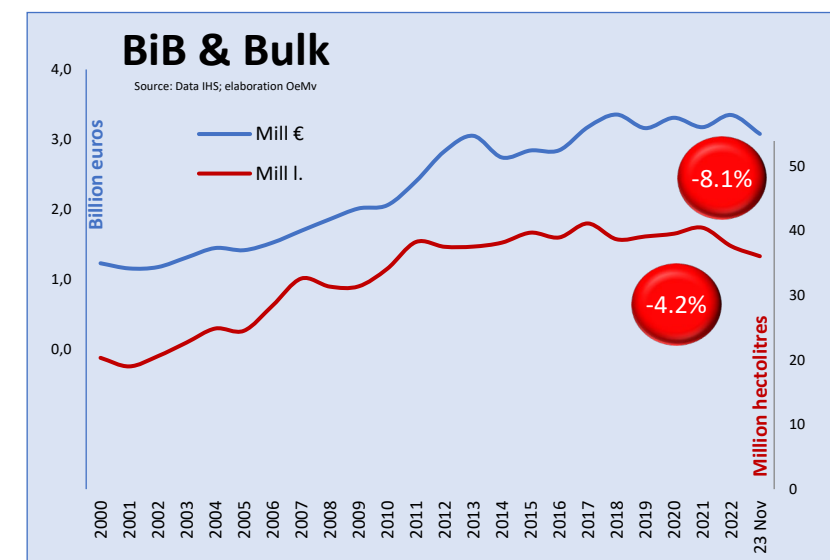
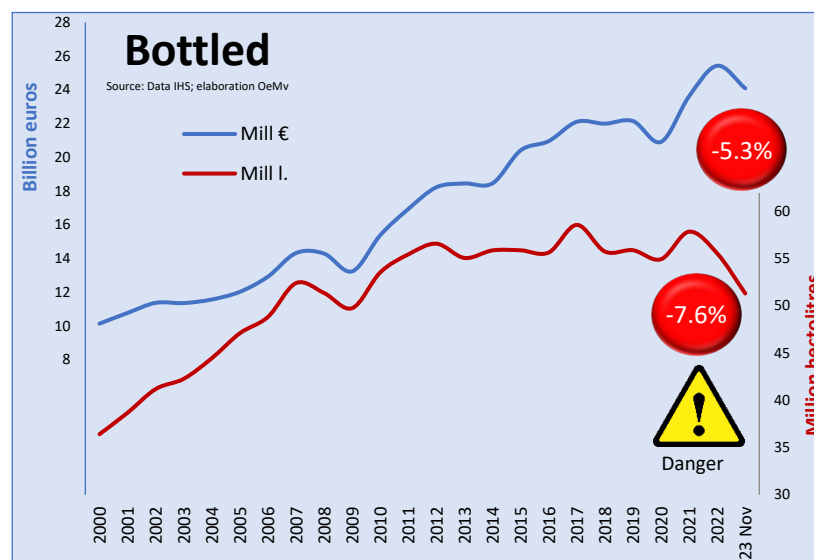
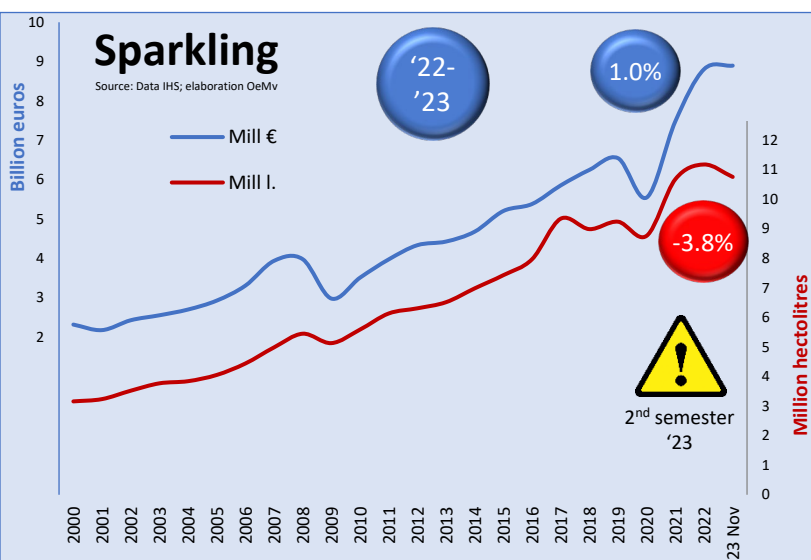
Growth of E-commerce



It's necessary to take measures in those directions. The wine sector is very conservative.

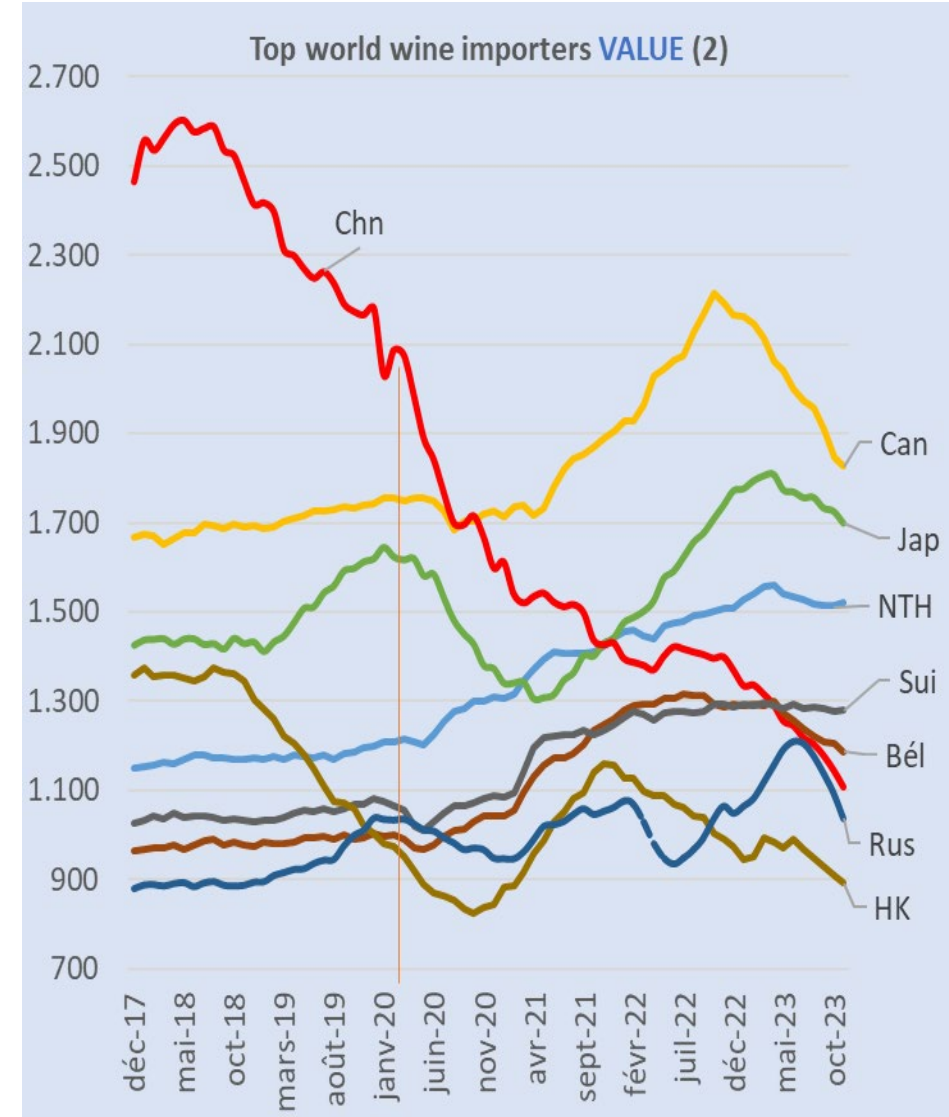
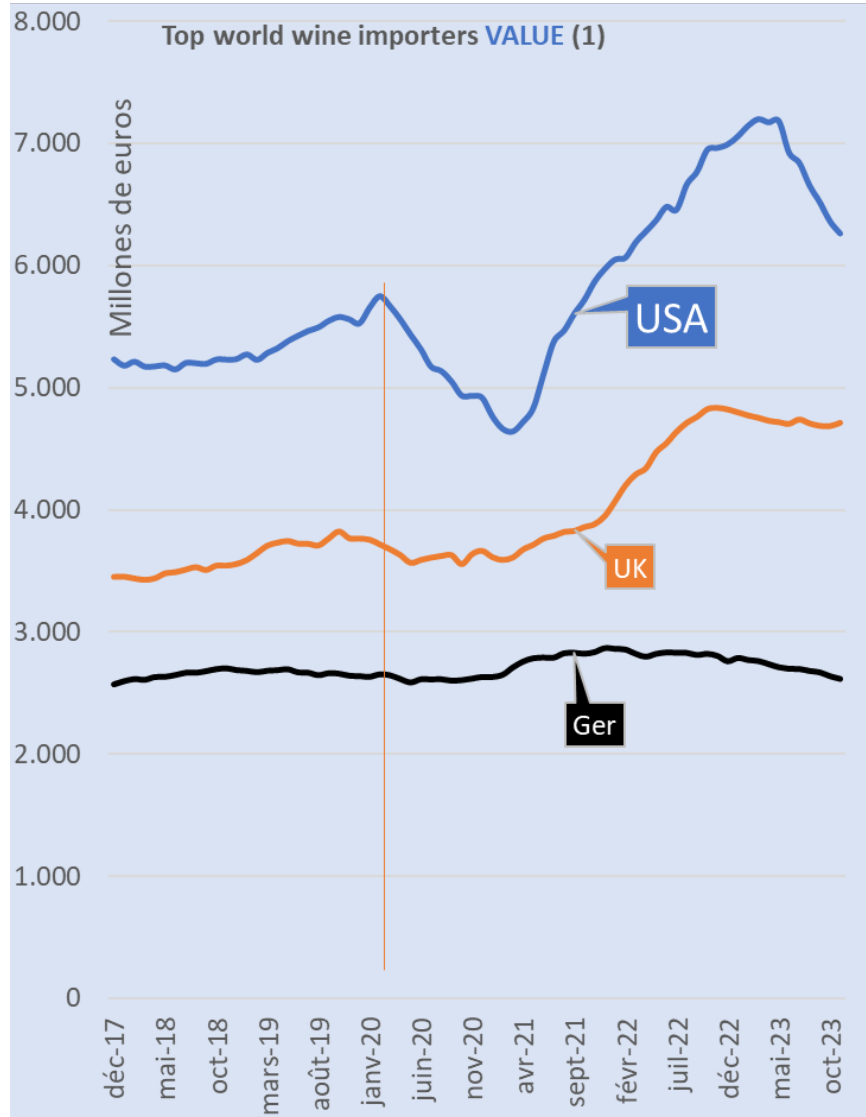
Source: from presentations in the MO 10 April

3. Trade Challenges and Opportunities



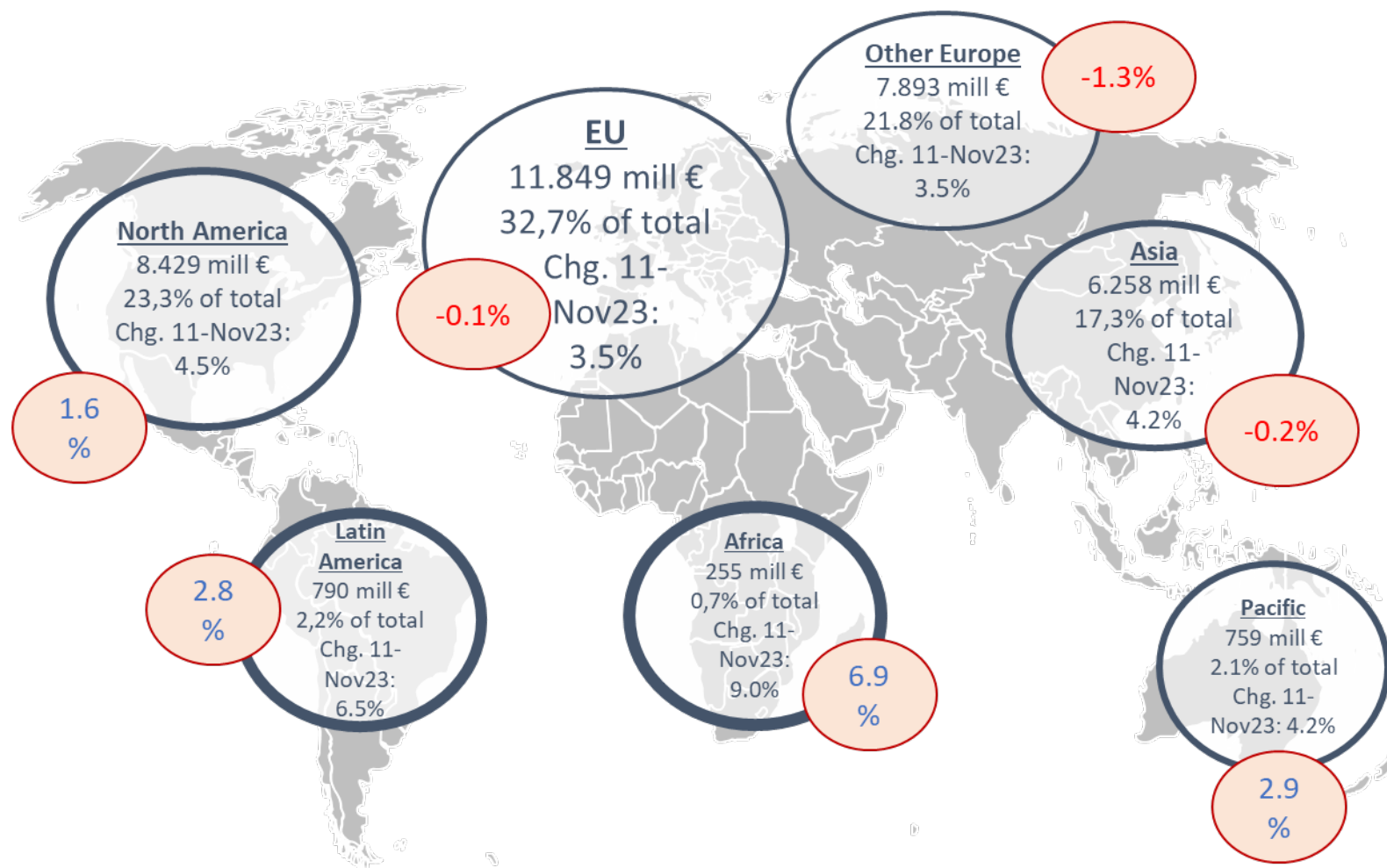
Source: from presentations in the MO 10 April

3. Trade Challenges and Opportunities



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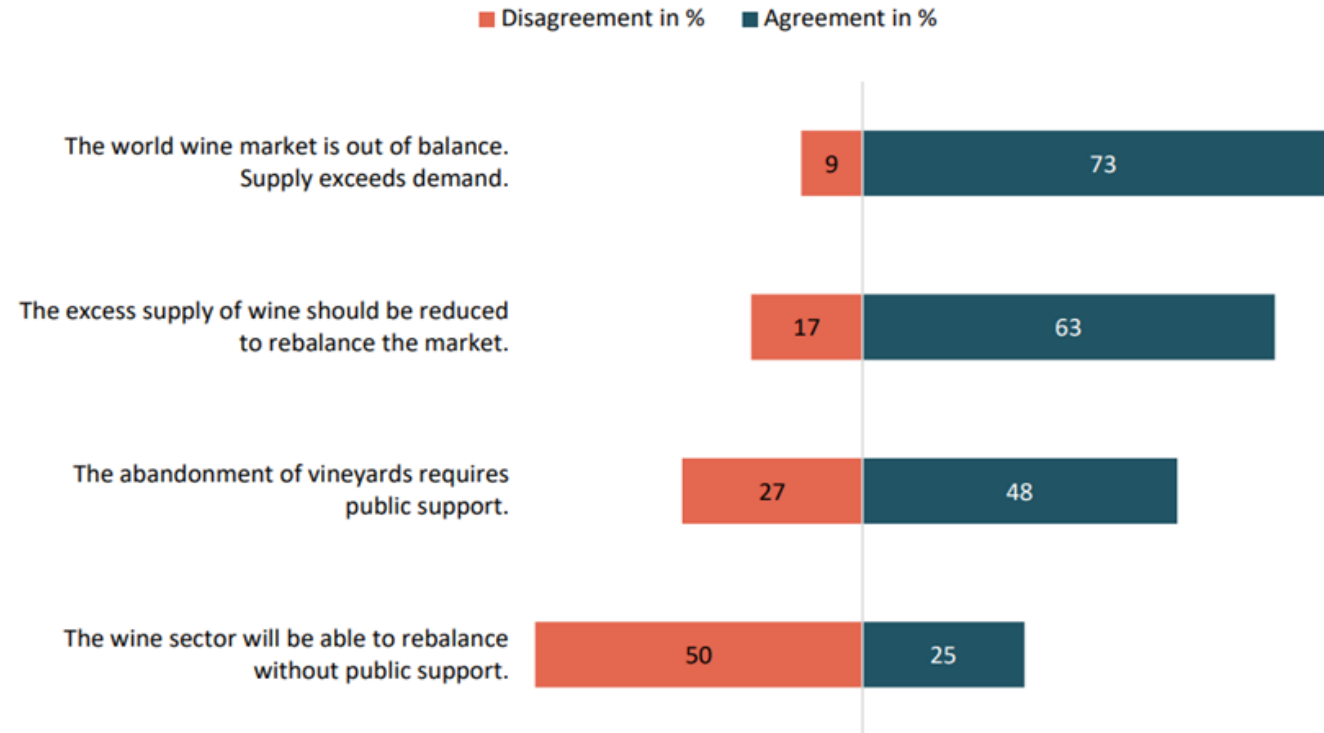
4. Production Challenges

- Portfolio extension vs. supply reduction
- Adaptation to changing consumer tastes
- Addressing production uncertainties (climate change)
 - Improve viticultural area knowledge
 - Optimize production conditions
 - Promote suitable plant material
 - Refine oenological practices
 - Ensure market evolution and production guarantee
 - Invest in research, development, transfer, and training
 - Contribute to mitigating climate change
- Ensuring resilience in economic challenges

4. Production Challenges - Producers view



Agreement with statements on the balance of the wine market All producers



Three quarters of producers see an imbalance in the world wine market. 66% of producers suggest reducing oversupply. One in two producers sees a need for public aid to abandon vineyards. Only 25% of producers expects the wine sector to rebalance without public support.

5. First Policy Recommendations



Adapt legislative framework to better meet consumer preferences



Targeted promotion, premiumization strategies and segmentation



Measures to address production uncertainties



Reduction and adaptation of supply



Promotion in 3rd countries



Reduction of red tape and strong single market

6. Following Steps



Preparation of MO report on wine market perspectives



Endorsement in next MO meeting in June



Useful for sector policy reflection

Thank you!