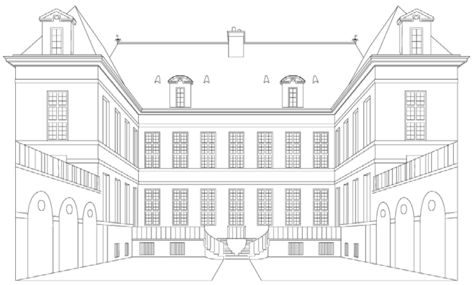
STATE OF THE WORLD VINE AND WINE SECTOR IN 2023

OIV



OIV 100

International Year of Vine and Wine 1924 • 2024

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Abbreviations
ha: hectares
kha: thousands of hectares
mha: millions of hectares
l: litres
khl: thousands of hectolitres
mhl: millions of hectolitres
m: million
bn: billion
EUR: euros
Prov.: provisional
Prel.: preliminary

THE YEAR 2023 IN A NUTSHELL

In 2023, the global vine and wine sector faced tough challenges. With historically low production volumes and rising prices, the year was defined by the lingering effects of the global inflationary pressures that started in 2022.

Key Highlights

• **Vineyard Surface Area:** The world's vineyard surface area continued its decline, shrinking by 0.5% from 2022 to 7.2 million hectares. This trend, observed for the third consecutive year, was driven by the removal of vineyards in major vine-growing regions (including all types of grapes) across both hemispheres.

• **Wine production:** Extreme climatic conditions and widespread fungal diseases severely impacted many vineyards worldwide, culminating in a historically low global wine production of 237 million hectolitres. This marked a 10% drop from 2022 and represented the lowest output since 1961.

• **Wine Consumption:** Global wine consumption in 2023 is estimated at 221 million hectolitres, indicating a decrease of 2.6% compared to 2022's already low figures. The spike in production and distribution costs, driven by inflationary pressures, led to higher wine prices for consumers, who were already dealing with diminished purchasing power. Despite these challenges, a few major markets demonstrated resilience.

• **International trade in wine:** The international trade in wine in 2023 was also notably affected by the rise in prices. Although the total volume of wine exported dropped to 99 million hectolitres, this was offset by a high export value, which reached 36 billion euros. The average price per litre of export wine hit a record high of 3.62 euros per litre.

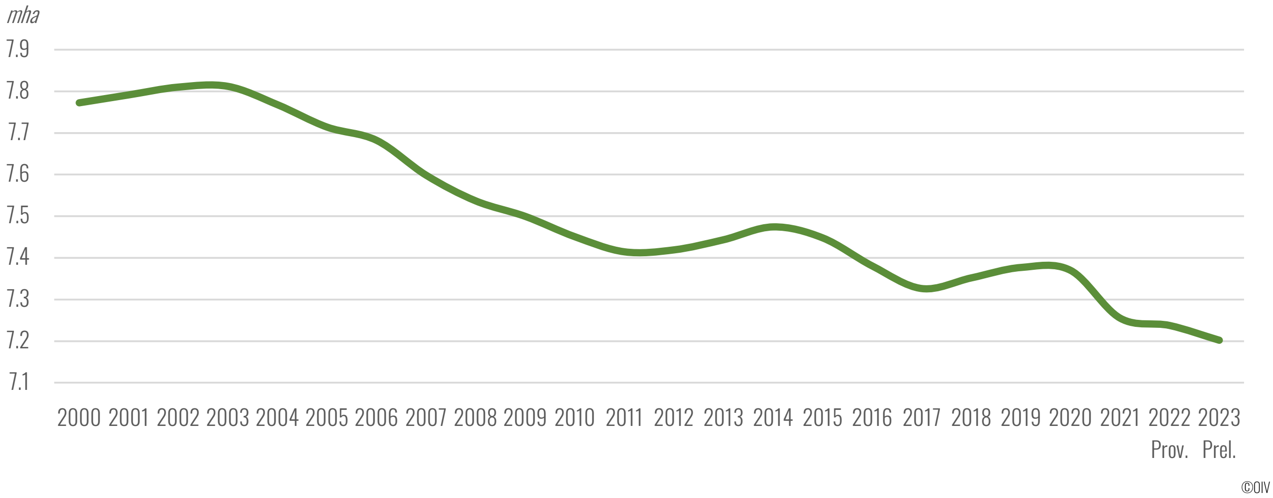
1 • VINEYARD SURFACE AREA

1.1 • World vineyard

In 2023, the world's vineyard surface area[1] stands at 7.2 million hectares, marking a slight decrease of 0.5% compared to 2022.

This decline, illustrated in Figure 1, signifies the third consecutive year of shrinking vineyard surfaces globally. The trend is attributed to a reduction in vineyard surface across major vine-growing countries in both hemispheres, with only a few exceptions. The trend has been noted both for wine and table grapes / dried grapes production. Moreover, China's vineyard surface, which has been one of the main drivers of the world vineyard's growth from 2012 to 2020, stabilised from 2020 onward.

Figure 1 • Evolution of world vineyard surface area



[1]The vineyard surface area refers to the planted area with vines for all purposes (wine grape, table grape, and grape to be dried), including young vines that are not yet productive.

1.2 • Major vine-growing countries

The **European Union's** (EU) vineyard landscape witnessed an overall decrease of -0.8% in 2023, totalling **3.3 mha**. The modest expansions reported in Italy, Germany, and Greece did not offset the level of vineyard removal observed in other EU countries.

At the country level, **Spain**, the largest vineyard in the world, accounts for **945 kha** in 2023 and has decreased by 1.0% compared to 2022. Similarly, **France**, with the second largest area under vines, saw a decrease of 0.4%, setting at **792 kha**. **Italy** continued its positive trend since 2016, reaching **720 kha**. **Romania** (**187 kha**) and **Portugal** (**182 kha**), the fourth and fifth largest EU vineyards, report a decline in surface areas in 2023 of -0.5% and -5.8%, respectively. Conversely, **Germany** (**104 kha**) and **Greece** (**94 kha**) recorded slight increases of +0.3% and +0.9%, respectively.

Outside the EU, **Moldova** maintained its position as the largest vineyard in Eastern Europe with **117 kha**, while **Russia** reported a surface area of **105 kha**.

After a long period of significant expansion from 2000 to 2015, the growth of the vineyard in **China**, third in the world by size, has slowed down in recent years and is estimated at **756 kha** in 2023 (-0.3%/2022).

Türkiye hosts the fifth largest vineyard in the world in 2023, with an estimated vineyard surface area of **410 kha**. In the last ten years, Türkiye recorded a negative trend, losing almost 20% of its vineyard surface.

In South America, **Argentina's** vineyard area decreased by 1.1%, reaching **205 kha** in 2023. Similarly, **Chile** saw a significant drop of -5.6%, totalling **172 kha**. **Brazil**, however, expanded its vineyard for the third consecutive year, reaching **83 kha** (+1.5%/2022).

South Africa's vineyard area (**122 kha**) diminished by 1.9%, marking the ninth consecutive year of decline, attributed in part to severe droughts between 2015 and 2017.

Australia's vineyard remained stable at **159 kha**, consistent with the average observed over the last five years.

Table 1 • Vineyard surface area of major vine-growing countries[2]

kha	2018	2019	2020	2021	2022 Prov..	2023 Prel.	23/22 % var.	2023 %world
Spain	972	966	961	963	955	945	-1.0%	13.1%
France	792	794	799	795	795	792	-0.4%	11.0%
China	779	781	766	754	758	*756*	-0.3%	10.5%
Italy	705	714	719	722	718	720	0.2%	10.0%
Türkiye	448	436	431	419	413	*410*	-0.8%	5.7%
USA	408	407	402	393	392	*392*	0.0%	5.4%
Argentina	218	215	215	211	207	205	-1.1%	2.8%
Romania	191	191	190	189	188	187	-0.5%	2.6%
Portugal	192	195	195	194	193	182	-5.8%	2.5%
India	149	151	161	167	175	*180*	2.7%	2.5%
Chile	208	210	207	182	182	172	-5.6%	2.4%
Iran	167	167	170	165	165	*165*	0.0%	2.3%
Australia	153	159	159	159	159	159	0.0%	2.2%
South Africa	130	129	128	126	124	122	-1.9%	1.7%
Uzbekistan	108	112	114	118	122	*122*	0.0%	1.7%
Moldova	143	143	140	118	117	*117*	0.0%	1.6%
Russia	94	96	97	99	101	105	4.1%	1.5%
Germany	103	103	103	103	103	104	0.3%	1.4%
Afghanistan	94	96	100	100	100	*100*	0.0%	1.4%
Greece	108	109	112	96	93	*94*	0.9%	1.3%
Egypt	80	78	85	83	85	*85*	0.0%	1.2%
Brazil	82	81	80	81	81	83	1.5%	1.1%
Algeria	75	74	75	68	70	*70*	0.0%	1.0%
Bulgaria	67	67	66	65	65	62	-4.6%	0.9%
Hungary	69	65	63	63	61	61	-1.1%	0.8%
Other countries	817	837	833	822	814	815	0.1%	11.3%
World total	**7352**	**7377**	**7370**	**7255**	**7237**	**7202**	**-0.5%**	**100%**

Figure in Italics: OIV estimate
Sources: OIV, FAO. National Statistical Offices

[2] Countries with a vineyard surface area equal to or above 50 kha in 2023.

2 • WINE PRODUCTION

2.1 • World wine production

In 2023, global wine production[3], excluding juices and musts, is estimated at 237 mhl, marking a significant decrease of nearly 25 mhl (-9.6%) compared to 2022. This downturn reflects one of the most significant declines witnessed in recent history. After maintaining production levels consistent with the 20-year average for four consecutive years, 2023's volume represents the lowest volume since 1961 (214 mhl).

The sharp decline can be attributed to a confluence of adverse climatic events, including early frost, heavy rainfall, and drought, coupled with widespread fungal diseases. These factors severely impacted harvest volumes across major wine-producing regions in both the Northern and Southern Hemispheres.

2.2 • Major wine-producing countries in the Northern Hemisphere

Vinified production in the **EU** in 2023 is estimated at **144.5 mhl**, which represents a sharp decrease of 10.6% (17 mhl) compared to 2022. This places it as the second-lowest production volume recorded since the beginning of the century, only behind 2017's output of 141 mhl.

At the country level within the EU, the picture is varied, reflecting diverse climatic conditions experienced across major wine regions during the 2023 growing season.

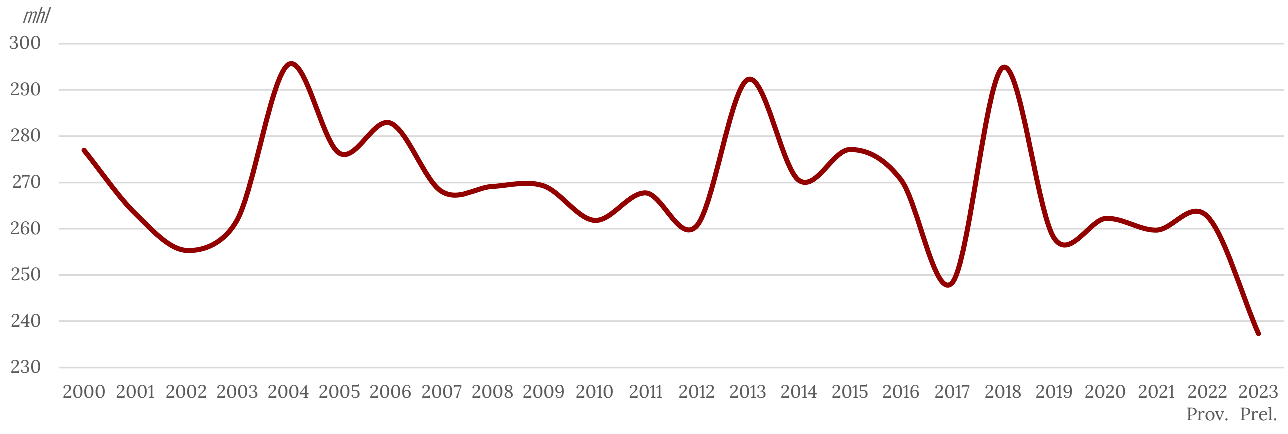
In some countries, a rainy spring led to fungal pressure, floods, damages, and losses in the vineyards. On the contrary, in other regions, primarily in the southern EU, severe droughts caused hydric stress to the vines. Only a few countries benefited from relatively favourable weather conditions, yielding average or above-average harvest volumes.

France, the world's leading wine producer in 2023, achieved an estimated volume of **48 mhl**, representing 20% of the global total. Notably, this figure is not only 4.4% higher than in 2022 but also exceeds the country's last five-year average by 8.3%.

Italy, the second-largest wine-producing nation globally, faced historically low production levels in 2023, with a notable 23.2% decrease, totalling **38.3 mhl**. This marks the smallest production since 1950, attributed to heavy rainfall fostering downy mildew in central and southern regions, along with flood and hail damage.

Spain also experienced a notable decline, reaching its lowest production since 1995, with an estimated output of **28.3 mhl**, down 20.8% from 2022 and 25.7% below the last five-year average. This downturn was primarily driven by severe drought and extreme temperatures impacting vineyards during the growing season.

Figure 2 • Evolution of world wine production (juices and musts excluded)



[3] Production volume resulting from wine grapes harvested in the first semester of 2023 in the Southern Hemisphere and in the second semester of 2023 in the Northern Hemisphere.

Among the other major EU countries, **Germany** (**8.6 mhl**, -3.8%/2022), **Hungary** (**2.4 mhl**, -2.1%/2022), **Austria** (**2.4 mhl**, -6.5%/2022) and **Greece** (**1.4 mhl**, -34.4%/2022) recorded smaller than average production volumes attributed to various climatic challenges. The harvest in Greece was particularly low due to the heavy rainfalls during spring which caused downy mildew, as well as elevated temperatures and drought in summer months that strongly impacted the vines. Conversely, **Portugal** (**7.5 mhl**, +9.8%/2022) and **Romania** (**4.6 mhl**, +21.2%/2022) recorded relatively large production volumes exceeding those of the previous year.

Concerning other countries outside the EU, **Russia** (**4.5 mhl**) reported a 2023 production level that is in line with its last five-year average, but 10% lower than the large production volume of 2022. Wine production in **Georgia** is estimated at **1.9 mhl**, a decrease of 3.0% compared to 2022. **Moldova**'s vinified production is estimated at **1.8 mhl** (+27.0%/2022), the third largest volume recorded in the last ten years. **Switzerland** recorded a wine production of **1.0 mhl**, which is in line with 2022 (+1.8%).

In Asia, **China** is the largest wine producer with a 2023 volume estimated at **3.2 mhl**, a reduction of 33.0% compared to the previous year.

In the **USA**, wine production in 2023 is estimated at **24.3 mhl**, a level 8.5% higher than in 2022 but in line with its five-year average. This relatively large production has been favoured by cool temperatures and heavy winter rains in the Napa and Sonoma regions.

2.3 • Major wine-producing countries in the Southern Hemisphere

After two large production volumes in 2021 and 2022, the **Southern Hemisphere** experienced a notable decline in wine production in 2023, totalling **47 mhl**, marking a 15.4% decrease from 2022 and a 13.2% drop from the last five-year average. This represents the lowest production level since 2003, attributed to extreme climatic events across major wine-producing regions.

The majority of South American wine-producing countries have registered a sharp fall in production with respect to 2022. In 2023, **Chile** was the largest producer in South America, with wine production estimated at **11.0 mhl**, 11.4% below 2022 production due to wildfires, droughts and flooding. **Argentina**'s wine production fell to **8.8 mhl** (-23.0%/2022), primarily due to spring frosts and hailstorms. This represents the lowest volume recorded since 1957. On the contrary, **Brazil** experienced an increase in its wine production with a total volume of **3.6 mhl**, which is not only 12.1% above the previous year but also 31.4% above its last five-year average.

South Africa's 2023 wine production is estimated at **9.3 mhl**, a decrease of 10.0% compared to its 2022 level. Fungal diseases, notably powdery and downy mildew, heavily impacted the harvest.

In Oceania, **Australia** faced a significant reduction in production to **9.6 mhl**, down 26.2% from 2022. This decline was primarily attributed to adverse weather conditions, including persistent rainfall, unusually cold temperatures, and floods, exacerbated by the effects of La Niña. Additionally, inventory pressures led to a reduction in yield. Conversely, **New Zealand**'s production of **3.6 mhl** saw positive growth compared to its last five-year average, despite a 5.8% decrease from 2022, indicating resilience amidst challenging conditions.

Table 2 • Wine production (juices and musts excluded) in major countries[4]

mhl	2018	2019	2020	2021	2022 Prov.	2023 Prel.	23/22 % Var.	23/avg.18-22 % Var.	2023 % world
France	49.2	42.2	46.7	37.6	46.0	48.0	4.4%	8.3%	20.2%
Italy	54.8	47.5	49.1	50.2	49.8	38.3	-23.2%	-23.9%	16.1%
Spain	44.9	33.7	40.9	35.3	35.8	28.3	-20.8%	-25.7%	11.9%
USA	*26.1*	*25.6*	*22.8*	*24.1*	*22.4*	*24.3*	8.5%	0.5%	10.2%
Chile	12.9	11.9	10.3	13.4	12.4	11.0	-11.4%	-9.7%	4.6%
Australia	12.7	12.0	10.9	14.8	13.1	9.6	-26.2%	-24.1%	4.1%
South Africa	9.5	9.7	10.4	10.8	10.3	9.3	-10.0%	-8.3%	3.9%
Argentina	14.5	13.0	10.8	12.5	11.5	8.8	-23.0%	-29.2%	3.7%
Germany	10.3	8.2	8.4	8.4	8.9	8.6	-3.8%	-2.9%	3.6%
Portugal	6.1	6.5	6.4	7.4	6.8	7.5	9.8%	13.2%	3.2%
Romania	5.1	3.8	3.8	4.5	3.8	4.6	21.2%	9.5%	1.9%
Russia	4.3	4.6	4.4	4.3	5.0	4.5	-10.0%	-0.6%	1.9%
New Zealand	3.0	3.0	3.3	2.7	3.8	3.6	-5.8%	14.3%	1.5%
Brazil	3.1	2.2	2.3	2.9	3.2	3.6	12.1%	31.4%	1.5%
China	*9.3*	*7.8*	*6.6*	*5.9*	*4.7*	*3.2*	-33.0%	-53.9%	1.3%
Hungary	3.6	2.4	2.6	2.6	2.5	2.4	-2.1%	-11.2%	1.0%
Austria	2.8	2.5	2.4	2.5	2.5	2.4	-6.5%	-6.3%	1.0%
Georgia	1.9	2.1	2.1	1.9	1.9	1.9	-3.0%	-5.8%	0.8%
Moldova	1.9	1.5	0.9	1.4	1.4	1.8	27.0%	25.0%	0.7%
Greece	2.2	2.4	2.2	2.4	2.1	1.4	-34.4%	-39.7%	0.6%
Switzerland	1.1	1.0	0.8	0.6	1.0	1.0	1.8%	11.6%	0.4%
Other countries	15.6	14.5	14.0	13.4	13.6	13.2	-2.7%	-6.9%	5.6%
World total	**294.8**	**257.9**	**262.2**	**259.7**	**262.6**	**237.3**	**-9.6%**	**-11.3%**	**100.0%**

Figure in italic: estimate OIV
Sources: OIV, EC DG AGRI, FAO, National Statistical Offices, Specialised Press

[4] Countries with a wine production equal to or above 1 mhl in 2023.

3 • WINE CONSUMPTION

3.1 • World wine consumption

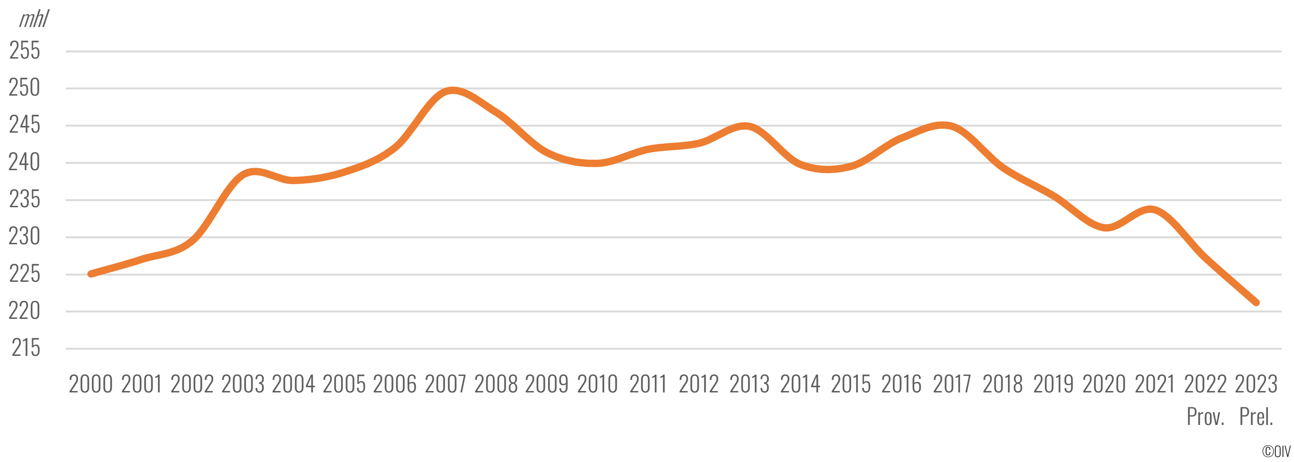
World wine consumption in 2023 is estimated at 221 mhl, marking a decrease of 2.6% compared to 2022. If this estimate is confirmed[5], it would signify the lowest volume recorded since 1996. The decline in global wine consumption has followed a relatively steady trajectory since 2018. Several factors contribute to this trend.

Notably, the decrease in China's consumption, averaging a loss of 2 mhl annually since 2018, has played a central role in driving down global consumption figures. The onset of the COVID-19 pandemic in 2020 exacerbated this downward trend, with lockdown measures negatively impacting major wine markets worldwide. In 2021, the relaxation of pandemic-related restrictions, coupled with the reopening of the hospitality sector (HoReCa) and the resurgence of social gatherings and festivities, led to a rebound in consumption across many countries.

However, in 2022, geopolitical tensions, particularly the conflict in Ukraine, and subsequent energy crises, along with disruptions in the global supply chain, resulted in heightened production and distribution costs. This, in turn, led to significant price increases for wine consumers, dampening overall demand.

Against the backdrop of a complex economic landscape, characterised by global inflationary pressures, the major wine markets experienced notable declines in 2023. A few exceptions notwithstanding, the prevailing conditions exerted considerable pressure on consumer purchasing power, further contributing to the downturn in wine consumption worldwide recorded in the last two years.

Figure 3 • Evolution of world wine consumption



[5] It usually takes about three years to have consolidated data.

3.2 • Major wine-consuming countries[6]

In 2023, the **EU** represents a market of **107 mhl**, accounting for 48% of the world's consumption. This figure reflects a marginal decrease of 1.8% compared to the previous year, placing EU wine consumption more than 5% below its ten-year average. This decline is attributed to an overall reduction in wine consumption observed in some of the major traditional wine-producing countries.

Within the EU, **France** maintains its position as the largest consuming country, with an estimated consumption of **24.4 mhl** in 2023, marking a 2.4% decrease from 2022. **Italy**, the second-largest market in the EU and third globally, saw a consumption level of **21.8 mhl** in 2023, down 2.5% from the previous year and 5.8% below its five-year average. **Germany**, the third-largest EU market, recorded a consumption volume of **19.1 mhl** in 2023, a modest decline of 1.6% from 2022.

Spain is one of the few large markets that did not see a fall in consumption in 2023, reporting a total consumption volume of **9.8 mhl** (+1.7%/2022). Conversely, **Portugal** (**5.5 mhl**) and the **Netherlands** (**3.3 mhl**), recorded the largest declines in consumption among major EU markets with a -9.2% over 2022. It is worth noting that while Portugal's consumption volume in 2023 exceeded its last five-year average by 5.1%, indicating relative stability, the Netherlands reported a consumption level 9% below its last five-year average, underscoring a more pronounced deviation from historical consumption patterns. Notably, **Romania** (**3.0 mhl**), experienced a significant upswing, with a 20% increase in wine consumption levels, fully recovering from the previous year's low consumption volume. **Austria** (**2.3 mhl**, -2.1%/2022) has shown a very stable consumption trend since 2015. Similarly to the **Czech Republic** (**2.2 mhl**, -3.7%/2022), which recorded a decline with respect to the previous year, reaching a level in line with its last five-year average.

Outside the EU, the **UK**, ranked fifth globally, saw a 2.9% decrease in wine consumption in 2023, estimated at **12.8 mhl**. Conversely, **Russia**'s wine consumption rose by 3.0%, reaching **8.6 mhl**, returning to pre-COVID-19 levels. **Switzerland** recorded the lowest wine consumption volume of the 21st century, estimated at **2.3 mhl**, reflecting a 3.0% decrease from 2022.

In the **USA**, the largest wine market globally, consumption decreased by 3.0% in 2023, reaching **33.3 mhl**. Similarly, **Canada** with **4.8 mhl** witnessed a decline of 5.6% compared to 2022, marking the first time since 2016 that total consumption fell below 5 mhl.

In Asian markets, **China**'s wine consumption plummeted by 24.7% in 2023, totalling **6.8 mhl**, reflecting an overall decline in internal demand. **Japan**, the second-largest consumer in Asia, experienced an increase of 2.1% from 2022, reaching **3.2 mhl**. This volume is, however, 4.2% below its last five-year average.

In South America, **Argentina**'s consumption decreased by 6.2% in 2023, reaching **7.8 mhl**, the lowest level in recent history. **Brazil**, the region's second-largest market, saw a notable increase of 11.6%, returning to 2020-2021 levels with an estimate of **4.0 mhl**.

South Africa's consumption in 2023 totalled **4.5 mhl**, a marginal 1.8% decrease from the previous year's record-high volume.

Australia's consumption remained relatively stable at **5.4 mhl**, showing a consistent trend over the past decade.

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[6] The estimates of national wine consumption levels presented in this chapter warrant careful interpretation due to the inherent limitations of the "apparent consumption" methodology (apparent consumption is a proxy measure for consumption defined as production plus imports minus exports, adjusting for changes in inventories), particularly in countries where comprehensive data on stock variations (therefore not taking into account destocking and stock management processes of importers and distributors), losses, or industrial uses of wine are not fully known or assessed.

Table 3 • Wine consumption in major countries[7]

mhl	2018	2019	2020	2021	2022 Prov.	2023 Prel.	23/22 % Var.	2023 % world
USA	*33.7*	*34.3*	*32.9*	*33.1*	*34.3*	*33.3*	-3.0%	15.1%
France	26.0	24.7	23.2	24.9	25.0	24.4	-2.4%	11.0%
Italy	22.4	22.6	24.2	24.2	22.4	21.8	-2.5%	9.9%
Germany	19.7	19.5	19.8	19.9	19.4	*19.1*	-1.6%	8.6%
UK	*12.9*	*12.6*	*13.7*	*13.9*	*13.1*	*12.8*	-2.9%	5.8%
Spain	10.7	10.2	9.2	10.3	9.6	9.8	1.7%	4.4%
Russia	*8.6*	*8.7*	*8.5*	*8.1*	*8.4*	*8.6*	3.0%	3.9%
Argentina	8.4	8.5	9.4	8.4	8.3	7.8	-6.2%	3.5%
China	*17.6*	*15.0*	*12.4*	*10.5*	*9.1*	*6.8*	-24.7%	3.1%
Portugal	5.1	5.4	4.4	5.3	6.1	5.5	-9.2%	2.5%
Australia	5.3	5.8	6.0	5.6	5.4	5.4	-0.1%	2.4%
Canada	*5.1*	*5.2*	*5.3*	*5.3*	*5.1*	*4.8*	-5.6%	2.2%
South Africa	4.0	3.7	3.0	3.9	4.6	4.5	-1.8%	2.0%
Brazil	3.3	3.6	4.1	4.1	3.6	4.0	11.6%	1.8%
Netherlands	*3.6*	*3.5*	*3.7*	*3.7*	*3.6*	*3.3*	-9.2%	1.5%
Japan	*3.5*	*3.5*	*3.5*	*3.1*	*3.2*	*3.2*	2.1%	1.5%
Romania	3.9	2.2	2.6	3.7	2.5	3.0	20.1%	1.4%
Switzerland	2.4	2.6	2.5	2.6	2.4	2.3	-3.0%	1.0%
Austria	2.4	2.3	2.3	2.4	2.4	2.3	-2.1%	1.0%
Czech Republic	2.0	2.2	2.1	2.2	2.2	2.2	-3.7%	1.0%
Other countries	38.8	39.5	38.6	38.6	36.6	36.3	-0.8%	16.4%
World total	**239**	**236**	**231**	**234**	**227**	**221**	**-2.6%**	**100.0%**

Figure in italics: OIV estimates
Sources: OIV, FAO, National Statistical Offices, Specialised Press

[7] Countries with wine consumption equal to or above 2 mhl in 2023.

4 • INTERNATIONAL TRADE IN WINE

4.1 • World trade volume and value

In 2023, low production volumes in the Southern Hemisphere, high average export prices and weakened international demand significantly impacted the **global wine export volume**, which decreased by 6.3% to **99.3 mhl**, the lowest recorded since 2010. The largest contributors to this decline in world trade volume with respect to 2022 are Chile (-1.5 mhl), South Africa (-0.9 mhl), France (-0.8 mhl), the USA (-0.7 mhl), New Zealand (-0.7 mhl), and Argentina (-0.7 mhl).

Despite a 4.7% decrease compared to the record high of 2022, the **global wine export value** in 2023 reached **36.0 billion EUR**, the second highest ever recorded.

This resilient performance is attributed to a significantly **high average export price**[8] of **3.62 EUR/l**, marking a 2% increase compared to 2022. As shown in Figure 6, this is the highest price level ever recorded, 29% above the average of 2020. However, it is important to note that this sharp rise in prices primarily stems from higher costs incurred by producers, importers, and distributors, a direct consequence of global inflationary pressures. The three countries contributing the most to the decrease in global export value compared to 2022 are Chile (-0.4 bn EUR), France (-0.3 bn EUR) and the USA (-0.3 bn EUR).

Figure 4 • Evolution of international trade in wine by volume

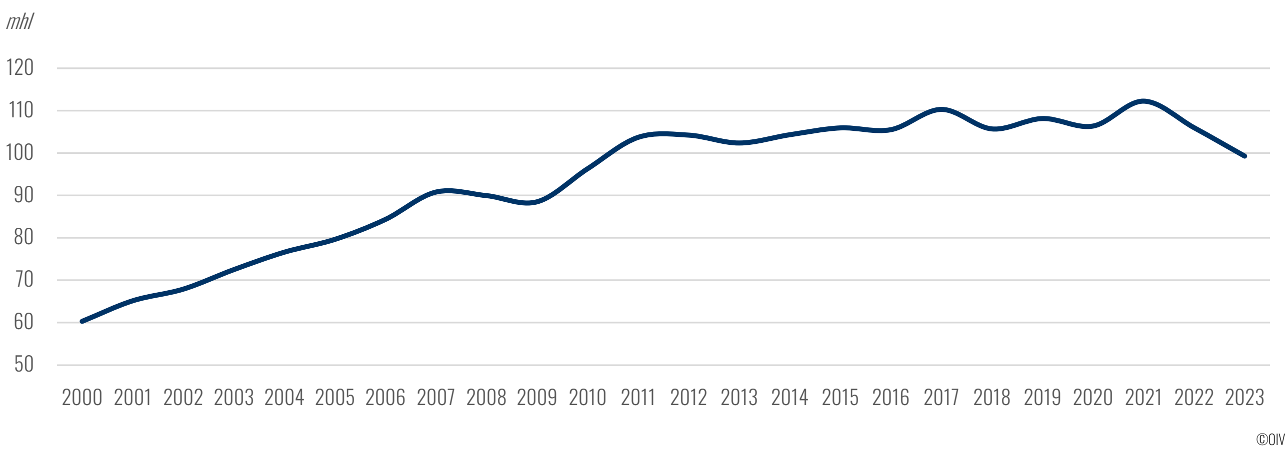
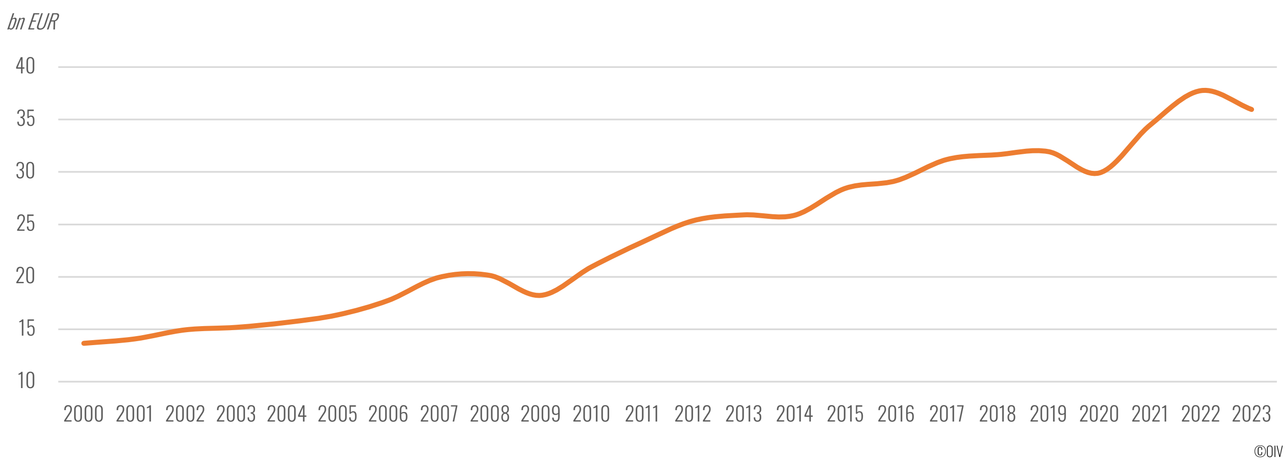
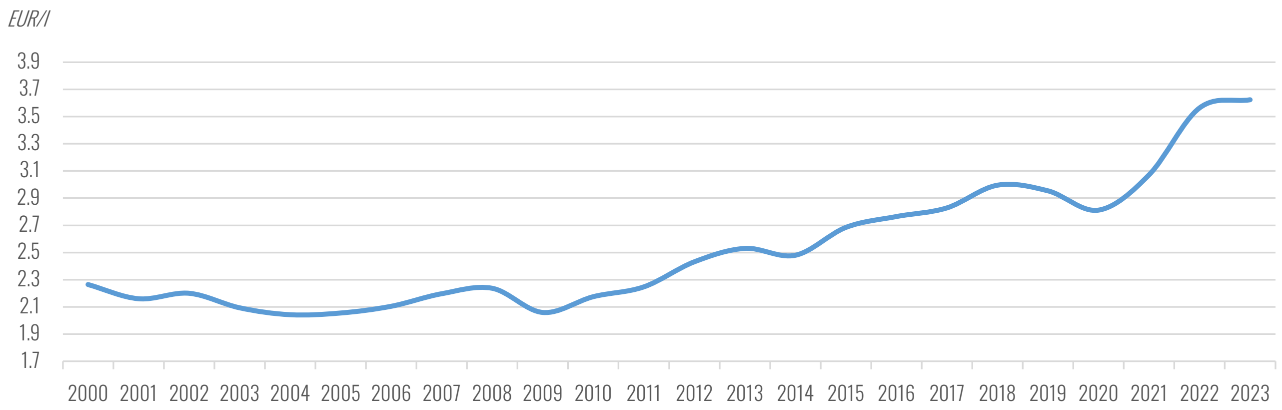


Figure 5 • Evolution of international trade in wine by value



[8] Data on export prices are based on cross-border data.

Figure 6 • Evolution of the average price of world wine exports



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4.2 • World trade by product type

Bottled wine (< 2 litres) represents 53% of trade volumes globally in 2023 and 67% of the world total wine export value. This category has decreased by 9% in volume and 6% in value compared to 2022. The average export price observed in 2023 is 4.7 EUR/l, marking a 3% increase over 2022.

Sparkling wine witnessed an unexpected decrease of 4% in terms of trade volume, accompanied by a 1% increase in value compared to 2022. This category maintained its share in 2023, representing 11% of total exported volume and 25% of export value. The average export price observed for sparkling wine in 2023 rose to 8.2 EUR/l, reflecting a 4% increase over the previous year.

Bag-in-Box® (BiB) refers to wines in containers holding more than 2 litres but less than 10 litres. In 2023, BiB represents a share of 4% in volume and 2% in value of the total world exports. Although experiencing a 4% decline in volume compared to 2022, the category in 2023 maintained a consistent value as a result of higher average export price (1.9 EUR/l, +4%/2022).

Bulk wine (> 10 litres) exports, the second largest category in volume, saw a 4% decrease in volume and a 10% decline in export value compared to 2022. Despite representing 33% of total world wine volume exports, bulk wine comprised only 7% of the total value of wine exports in 2023. Notably, the category recorded an average export price of 0.7 EUR/l, reflecting a 7% decrease compared to 2022.

Table 4 • Breakdown of international trade in wine by product type

Volume (mhl)		Value (bn EUR)		Type	Vertical Structure in 2023		Var. 23/22	
2022	2023	2022	2023		volume	value	volume	value
106.0	99.3	37.8	36.0	Bottled (< 2 l)	52%	67%	-9%	-6%
				Sparkling	11%	25%	-4%	1%
				BiB	4%	2%	-4%	0%
variation of -6.3%		variation of -4.7%		Bulk (> 10 l)	33%	7%	-4%	-10%

Sources: OIV, GTA

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4.3 • Major wine exporters

In 2023, Italy, Spain, and France exported 54.9 mhl of wine, constituting 56% of global wine exports by volume. However, each of these countries experienced a decline in export volume compared to the previous year: **Italy** saw a slight decrease to **21.4 mhl** (-1.0%); **Spain** experienced a decline to **20.8 mhl** (-6.6%); and **France**'s exports decreased to **12.7 mhl** (-5.8%).

Regarding export value, these three countries all experienced a decline compared to 2022. **France** remained the highest-value exporter in 2023 at **11.9 bn EUR** (-2.8%), followed by **Italy** at **7.7 bn EUR** (-0.8%), and **Spain** at **2.9 bn EUR** (-3.2%). Combined, these three EU countries accounted for 63% of the total global export value. Sparkling wine export value increased only in Italy (+3%/2022), while Spain and France saw slight declines of 1%. The volume of exported bottled wine significantly dropped, with Italy, Spain, and France experiencing reductions of -4%, -10%, and -10%, respectively. Bulk wine witnessed an increase in volume only for Italy (+12%/2022), which however recorded a value in line with 2022.

Export volumes from Southern Hemisphere countries (where the harvest occurs early in the year) were impacted by the smaller harvests in many of these countries, as well as by global economic conditions.

Chile, the fourth largest global exporter, saw a significant decrease in volume by 18.1% to **6.8 mhl**, with the value dropping by 22.4% to **1.4 bn EUR**. This is the consequence of a very low production volume recorded in 2023, together with an overall weakened demand in main export destinations.

Australia's wine trade faced a downturn in 2023 after rebounding in 2022. The volume decreased to **6.2 mhl** (-2.9%), with the value falling to **1.2 bn EUR** (-10%). Bottled wine, which constitutes 72% of Australian wine export value, decreased by 10% in 2023. Meanwhile, bulk wine constituted the primary category of Australian wine exports by volume, and it experienced a 5% increase in 2023, making it the only category to witness growth.

In 2023, the wine export volume of **South Africa** shrank by 20.3% to **3.5 mhl**, while the value decreased by a lesser extent (-13.5%), reaching a total of **0.5 bn EUR**. The export of South African bottled wine, accounting for 70% of the export value, declined by 11% in volume.

Among the other major **EU** countries, **Germany**, the seventh-largest global exporter, saw a decline in its wine exports in volume (**3.3 mhl**, -8.0%/2022). However, the value, totalling **1.1 bn EUR**, increased by 0.8% compared to the previous year. **Portugal** saw a decrease in export volume of 1.8% to **3.2 mhl**, and a slight decline in value by 1.2% to **0.9 bn EUR**. For both countries, there were notable changes in bulk wine exports: Germany's export volume decreased by 46% compared to 2022, while Portugal, in contrast, saw a 15% increase.

Canada's wine exports recorded an increase in volume with **2.3 mhl** (+6.1%/2022) and in value with **0.1 bn EUR** (+7.4%/2022). Notably, 99% of its exports are bulk wine, almost all (99.7%) of which is destined for the USA.

The **USA** reported a 25.8% decrease in export volume to **2.1 mhl**, along with a 19.1% reduction in value to **1.1 bn EUR**. The only category that witnessed a positive performance was sparkling wine, which however represents only 5% of the total value.

In **Argentina**, 2023 wine export volume declined by 26.1% to **2.0 mhl**, 77% of which is constituted of bottled wine. The overall export value in 2023 dropped to **0.6 bn EUR** (-19.8%/2022).

New Zealand's wine export volume significantly declined in 2023 after a substantial increase in 2022, with volume (**2.0 mhl**) and value (**1.2 bn EUR**) decreasing by 26.3% and 11.1%, respectively. Bottled wine continued to hold the majority share by value at 74%, despite declines of 9% in volume and 10% by value.

Table 5 • Major wine exporters[9]

	Volume (mhl)		Value (m EUR)		Type	Vertical Structure in 2023		Variation 2023/2022	
	2022	2023	2022	2023		volume	value	volume	value
Italy	21.6	21.4	7 796	7 735	bottle (< 2 l)	55%	66%	-4%	-3%
					sparkling	24%	29%	-2%	3%
					BiB	2%	2%	-2%	8%
	variation of -1.0%		variation of -0.8%		bulk (>10 l)	19%	4%	12%	0%
Spain	21.4	20.8	3 007	2 910	bottle (< 2 l)	32%	62%	-10%	-4%
					sparkling	8%	17%	-5%	-1%
					BiB	3%	3%	6%	9%
	variation of -2.9%		variation of -3.2%		bulk (>10 l)	57%	18%	-1%	-3%
France	13.4	12.7	12 279	11 937	bottle (< 2 l)	71%	59%	-10%	-4%
					sparkling	17%	38%	-10%	-1%
					BiB	4%	1%	4%	7%
	variation of -5.8%		variation of -2.8%		bulk (>10 l)	9%	1%	-1%	-4%
Chile	8.3	6.8	1 818	1 411	bottle (< 2 l)	56%	81%	-21%	-23%
					sparkling	1%	1%	-6%	-10%
					BiB	2%	2%	-8%	-15%
	variation of -18.1%		variation of -22.4%		bulk (>10 l)	41%	16%	-15%	-21%
Australia	6.4	6.2	1 381	1 243	bottle (< 2 l)	31%	72%	-14%	-10%
					sparkling	2%	4%	-9%	-11%
					BiB	5%	2%	-11%	-17%
	variation of -2.9%		variation of -10.0%		bulk (>10 l)	63%	22%	5%	-8%
South Africa	4.4	3.5	660	571	bottle (< 2 l)	41%	70%	-11%	-10%
					sparkling	2%	4%	10%	-2%
					BiB	6%	5%	-35%	-21%
	variation of -20.3%		variation of -13.5%		bulk (>10 l)	52%	21%	-25%	-22%
Germany	3.5	3.3	1 047	1 055	bottle (< 2 l)	73%	78%	-6%	1%
					sparkling	10%	13%	-8%	2%
					BiB	13%	7%	-2%	5%
	variation of -8.0%		variation of 0.8%		bulk (>10 l)	4%	2%	-46%	-19%
Portugal	3.3	3.2	939	928	bottle (< 2 l)	75%	90%	-3%	-1%
					sparkling	1%	1%	-14%	-14%
					BiB	10%	8%	-8%	-3%
	variation of -1.8%		variation of -1.2%		bulk (>10 l)	14%	4%	15%	5%
Canada	2.1	2.3	81	87	bottle (< 2 l)	1%	28%	47%	1%
					sparkling	0%	2%	1%	10%
					BiB	0%	1%	-27%	0%
	variation of 6.1%		variation of 7.4%		bulk (>10 l)	99%	68%	6%	11%
USA	2.8	2.1	1 401	1 133	bottle (< 2 l)	56%	83%	-20%	-20%
					sparkling	4%	5%	134%	83%
					BiB	4%	3%	-3%	-14%
	variation of -25.8%		variation of -19.1%		bulk (>10 l)	36%	9%	-39%	-37%
Argentina	2.7	2.0	752	603	bottle (< 2 l)	77%	92%	-24%	-19%
					sparkling	1%	1%	-43%	-46%
					BiB	0%	0%	-44%	-34%
	variation of -26.1%		variation of -19.8%		bulk (>10 l)	22%	6%	-28%	-19%
New Zealand	2.7	2.0	1 349	1 200	bottle (< 2 l)	57%	74%	-9%	-10%
					sparkling	1%	1%	-29%	-19%
					BiB	1%	1%	-21%	-19%
	variation of -26.3%		variation of -11.1%		bulk (>10 l)	41%	25%	-7%	-13%

Sources: OIV, GTA ©OIV

[9] Countries with wine exports equal to or above 2 mhl in 2023.

4.4 • Major wine importers

In 2023, **Germany**, the **UK**, and the **USA** maintained their positions as the top import markets globally, collectively representing nearly 40% of the world's total imported wine volume and 37% in terms of value.

The largest importer by volume in 2023 is **Germany**, with **13.6 mhl** (-0.3%/2022). A minor drop was observed in all categories except bulk wine, which saw a 5% increase. Germany ranks third in import value at **2.6 bn EUR**, a decrease of 4.6% over 2022. This decline is primarily due to the drop in the import value of bottled wine, which comprises 62% of the total value.

The **UK**, the second largest import market, has decreased its imports in both volume and value. The import volume dropped to **12.3 mhl**, a decrease of 5.1% compared to 2022, with the value falling to **4.7 bn EUR**, a decrease of 3.3%. Bulk wine is the category that decreased the most in value (-14%), while sparkling wine increased by 2% in value despite a decline of 3% in volume.

The **USA** fell from first place in 2022 to third place in 2023 in global wine import volume rankings, with a significant decrease to **12.3 mhl** (-14.6%/2022). Correspondingly, the import value declined to **6.2 bn EUR** (-11.5%/2022). However, despite this strong decline in volume, the USA remains the largest import market by value globally. Sparkling wine witnessed a significant drop of 18% in volume and -17% in value.

France and the Netherlands, the largest importers by volume within the EU, showed opposite trends in 2023. **France** imported **6.0 mhl**, marking a decrease of 4.6%, and an associated decline in value to **1.0 bn EUR** (-3.5%/2022). On the other hand, the **Netherlands** recorded a volume of **4.4 mhl** (+0.5%/2022) worth **1.5 bn EUR** (+0.8%/2022).

Russia imported **4.0 mhl** (+2%, 2022) in volume in 2023, continuing the upward trend from 2022.[10]

Canada, the seventh importer by volume globally, reported overall imports of **3.8mhl** (-10.2%/2022), worth **1.8 bn EUR** (-14.8%/2022).

Belgium's wine import in 2023, at **3.0 mhl** in volume worth **1.2 bn EUR**, reported a decline of 10.8% and 9.8% in terms of volume and value respectively, with reductions recorded in all wine categories.

In 2023, **Portugal** saw a 3.3% increase in wine import volume, reaching **3.0 mhl**, 76% of which is bulk wine. However, the overall import value declined to **0.2 bn EUR** (-2.4%/2022).

Wine imports in **China** have declined for the sixth consecutive year. In 2023 the imported volume reached **2.5 mhl** (-26.1%/2022), worth **1.1 bn EUR** (-21.7%/2022).

In 2023, **Japan** imported **2.3 mhl** (-12.5%/2022) in volume, worth **1.6 bn EUR** (-7.1%/2022). Only sparkling wine, which accounts for 42% of total imported value, recorded a total value nearly in line with 2022, despite a 10% decline in volume.

In 2023, **Italy** imported **2.0 mhl** of wine, marking a slight increase of 0.6% compared to 2022, with a corresponding value of **0.5 bn EUR**, representing a substantial 18.7% rise over the previous year. Bulk wine comprises a significant share (82%) of the total imported volume.

Sweden's import volume stood at **2.0 mhl** in 2023, reflecting a decrease of 7.3% from 2022, with a corresponding value of **0.8 bn EUR**, down by 2.2% from the previous year. Remarkably, Sweden emerges as one of the world's largest importers of BiB wine, representing 25% of the total imported volume and 14% of the value.

[10] Data on import value as well as the breakdown by product type are not available.

Table 6 • Major wine importers[11]

	Volume (mhl)		Value (m EUR)		Type	Vertical Structure in 2023		Variation 2023/2022	
	2022	2023	2022	2023		volume	value	volume	value
Germany	13.6	13.6	2 776	2 648	bottle (< 2 l)	36%	62%	-7%	-7%
					sparkling	5%	19%	-4%	2%
					BiB	2%	2%	-2%	6%
	variation of -0.3%		variation of -4.6%		bulk (>10 l)	56%	18%	5%	-2%
UK	13.0	12.3	4 821	4 663	bottle (< 2 l)	49%	61%	-4%	-3%
					sparkling	13%	26%	-3%	2%
					BiB	2%	1%	3%	8%
	variation of -5.1%		variation of -3.3%		bulk (>10 l)	36%	12%	-7%	-14%
USA	14.4	12.3	6 990	6 185	bottle (< 2 l)	53%	70%	-11%	-8%
					sparkling	14%	25%	-18%	-17%
					BiB	1%	0%	-14%	2%
	variation of -14.6%		variation of -11.5%		bulk (>10 l)	33%	5%	-18%	-29%
France	6.2	6.0	992	957	bottle (< 2 l)	17%	57%	-3%	-8%
					sparkling	7%	17%	10%	23%
					BiB	3%	2%	7%	8%
	variation of -4.6%		variation of -3.5%		bulk (>10 l)	74%	24%	-6%	-8%
Netherlands	4.4	4.4	1 506	1 518	bottle (< 2 l)	87%	83%	-1%	-0%
					sparkling	5%	13%	-2%	3%
					BiB	5%	2%	61%	54%
	variation of 0.5%		variation of 0.8%		bulk (>10 l)	3%	1%	-7%	-9%
Russia	3.9	4.0	-	-	bottle (< 2 l)	-	-	-	-
					sparkling	-	-	-	-
					BiB	-	-	-	-
	variation of 2.0%		variation of -		bulk (>10 l)	-	-	-	-
Canada	4.2	3.8	2 167	1 846	bottle (< 2 l)	65%	84%	-14%	-15%
					sparkling	6%	11%	-11%	-14%
					BiB	2%	1%	8%	-0%
	variation of -10.2%		variation of -14.8%		bulk (>10 l)	27%	3%	-1%	-14%
Belgium	3.4	3.0	1 301	1 174	bottle (< 2 l)	57%	63%	-14%	-11%
					sparkling	20%	29%	-9%	-8%
					BiB	7%	3%	-8%	-9%
	variation of -10.8%		variation of -9.8%		bulk (>10 l)	17%	5%	-4%	-7%
Portugal	2.9	3.0	197	192	bottle (< 2 l)	20%	31%	1%	2%
					sparkling	2%	19%	-4%	7%
					BiB	2%	1%	-18%	-35%
	variation of 3.3%		variation of -2.4%		bulk (>10 l)	76%	49%	1%	-6%
China	3.4	2.5	1 369	1 072	bottle (< 2 l)	61%	86%	-30%	-21%
					sparkling	2%	7%	-28%	-12%
					BiB	1%	1%	-18%	-27%
	variation of -26.1%		variation of -21.7%		bulk (>10 l)	35%	6%	-18%	-38%
Japan	2.7	2.3	1 770	1 644	bottle (< 2 l)	63%	55%	-11%	-10%
					sparkling	17%	42%	-10%	-2%
					BiB	6%	1%	-15%	-18%
	variation of -12.5%		variation of -7.1%		bulk (>10 l)	14%	2%	-19%	-20%
Italy	2.0	2.0	461	547	bottle (< 2 l)	10%	21%	5%	14%
					sparkling	7%	66%	8%	25%
					BiB	1%	0%	-11%	44%
	variation of 0.6%		variation of 18.7%		bulk (>10 l)	82%	13%	-14%	-1%
Sweden	2.1	2.0	852	832	bottle (< 2 l)	46%	58%	-9%	-3%
					sparkling	13%	21%	-1%	0%
					BiB	25%	14%	-19%	-4%
	variation of -7.3%		variation of -2.2%		bulk (>10 l)	16%	6%	22%	0%

Sources: OIV, GTA

[11] Countries with wine imports equal to or above 2 mhl in 2023.

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