STATE OF THE WORLD VITIVINICULTURAL SECTOR IN 2019

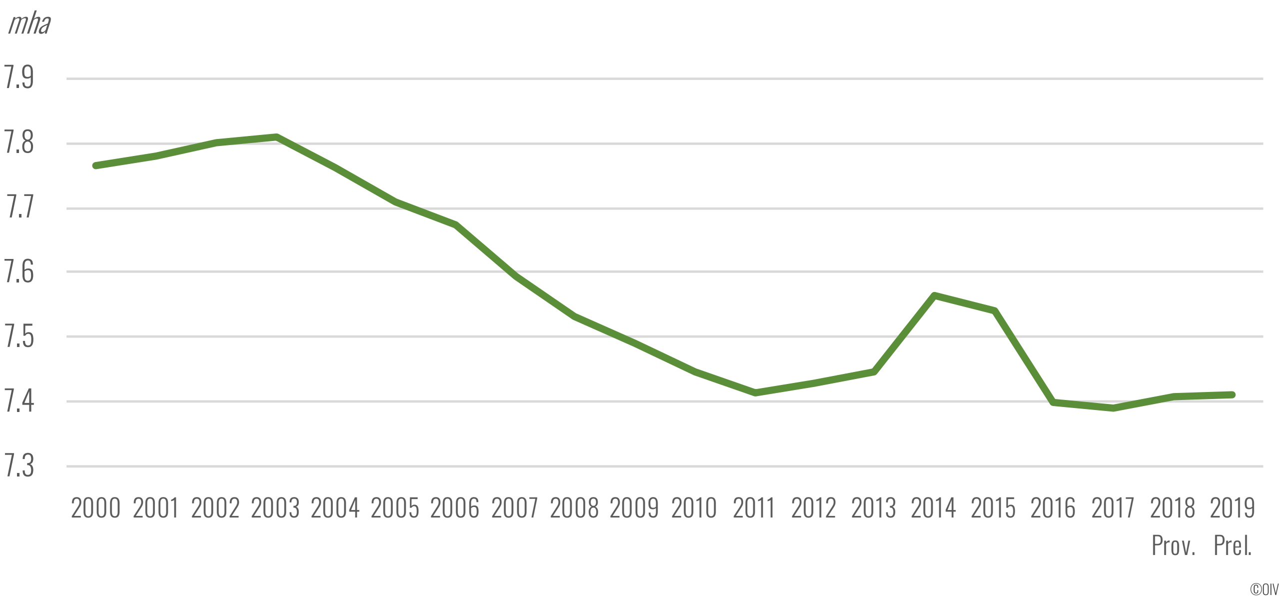
OIV

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

1 • VINEYARD SURFACE AREA

In 2019 the world area under vines, corresponding to the total surface area planted with vines for all purposes (wine, table grapes and raisins), including young vines not yet in production, **is estimated at 7.4 mha.** As shown in fig. 1, the surface area of the world vineyard seems to have stabilised since 2016, after the fall caused by the significant reduction in the vineyard surface area in countries like China, Turkey, Iran, USA and Portugal. The current stabilisation, however, hides heterogeneous evolutions in different regions in the world.

Fig. 1 • Evolution of the world vineyard surface area



Trends in the main vine-growing countries

Starting with the **Northern Hemisphere**, overall stability can be observed in the **European Union (EU)** vineyards, which stand for the fifth consecutive year at **3.2 mha**. The EU vineyard is undergoing a global balance between grubbing up and new planting since 2015. This stability can be attributed on the one hand to the end of the European Union grubbing up programme (up till the 2010/2011 harvest) to regulate viticultural production potential in the EU[1], and on the other hand to the management of viticultural production potential[2], which since 2016 has enabled Member States to authorise planting of up to an annual growth of 1% of the vineyard already planted.

Within the EU, the latest available data for 2019 indicates an increase in the area under vines in **France (794 kha)**, **Italy (708 kha)**, **Portugal (195 kha)**, and **Bulgaria (67 kha)**. The vineyard surface area in **Spain (966 kha)**, **Hungary (69 kha)** and **Austria (48 kha)**, on the other hand, slightly decreased with respect to 2018.
A stabilization has been observed in **Romania (191 kha)** and in **Germany (103 kha)**.

[1] Regulation (EC) No. 479/2008 of 29 April 2008 on the common organisation of the market in wine, which accompanied the grubbing-up of vines.
[2] Regulation (EU) No. 1308/2013 introduced in 2016, a new tool for the management of viticultural production potential, based on a system of new planting authorisations, replacing the old planting-rights system.

In Eastern Europe, **Russia** registered a growth of 1.2 kha in 2019, reaching **95 kha**. **Moldova** follows an opposite trend, with a vineyard of **143 kha** (-2.8% / 2018), which can be explained by the current process of restructuring and transformation of its vineyard.

Turkey, the fifth vineyard in the world, saw once again the size of its vineyard area decrease in 2019 by 12.3 kha, to a total surface of **436 kha**.

In East Asia, after over 10 years of significant expansion, the growth of **Chinese vineyard (855 kha)**, second in the world by surface area just behind Spain, seems to be slowing[3] .

In the **United States**, the vineyard has been consistently decreasing since 2014, and its estimated surface area in 2019 is **408 kha**[4] . A recent revision by the USDA of the series on surface area revealed a sharp decline in the surface in 2018 that was intended to overcome a grape oversupply problem. One of the consequences of this issue is that some vineyards have apparently been reconverted to other cultivars such as almonds and pistachios.

In the **Southern Hemisphere**, the recent evolution of vineyard surface area in major vine-growing countries differs from region to region.

In **South America**, developments in vineyard surface area between 2018 and 2019 showed a downward trend for the fourth year in a row. The first vineyard by size is **Argentina**, which pursued its decline begun in 2014, to reach **215 kha** (-3.0 kha / 2018). Similarly, **Chile** slightly decreased its vine surface, estimated at **200 kha** in 2019. Also, **Brazil** continued its decline in surface, and now stands at **81 kha** (-0.2 kha / 2018). The only exception in the continent is represented by **Peru** that increased by 7.1 kha (+17% / 2018) its vineyard surface area reaching **48 kha**.

After three consecutive years of drought that strongly impacted the vitivinicultural sector, **South Africa's** vineyard surface area remained stable with respect to 2018, at **128 kha**. This seems to put an end to the negative trend that started in 2014.

In **Oceania**, while in **Australia** the area under vines remained stable at **146 kha** in 2019, in **New Zealand** the surface area grew by 1.6 % reaching a record-high of **39 kha**.

[3] In absence of official data for 2019, the data known for 2018 has been carried forward provisionally
[4] See footnote 3

Fig. 2 • Vineyard surface area of major vine-growing countries[5]

kha	2015	2016	2017	2018 Prov.	2019 Prel.	2019/2018 % Var.	2019 % world
Spain	974	975	968	972	966	-0.6%	13.1%
China*	859	807	830	855	855	0.0%	11.5%
France	785	786	788	792	794	0.2%	10.7%
Italy	685	693	699	701	708	1.0%	9.6%
Turkey	497	468	448	448	436	-2.8%	5.9%
USA*	446	439	434	408	408	0.0%	5.5%
Argentina	225	224	222	218	215	-1.4%	2.9%
Chile	214	209	207	203	*200*	-1.3%	2.7%
Portugal	204	195	194	192	195	1.2%	2.6%
Romania	191	191	191	191	191	0.0%	2.6%
Iran*	217	168	153	177	177	0.0%	2.4%
India*	129	131	147	149	149	0.0%	2.0%
Australia	147	145	145	146	146	0.1%	2.0%
Moldova	140	145	151	147	143	-2.9%	1.9%
South Africa	133	130	128	123	122	-0.2%	1.7%
Uzbekistan*	129	121	111	108	108	0.0%	1.5%
Greece*	107	105	106	*106*	106	0.0%	1.4%
Germany	103	102	103	103	*103*	0.0%	1.4%
Russia	85	88	90	93	95	1.4%	1.3%
Afghanistan*	85	89	94	94	94	0.0%	1.3%
Egypt*	81	83	84	85	85	0.0%	1.1%
Brazil	87	86	84	82	81	-0.3%	1.1%
Algeria*	71	76	75	75	75	0.0%	1.0%
Hungary	68	68	68	69	69	-0.3%	0.9%
Bulgaria	64	64	65	67	67	0.6%	0.9%
Georgia	48	48	48	48	49	2.2%	0.7%
Austria	45	46	48	49	48	-0.3%	0.7%
Peru	33	36	38	41	48	17.4%	0.6%
Other countries	687	677	671	667	668	0.1%	9.0%
World total	**7540**	**7398**	**7390**	**7409**	**7402**	**-0.1%**	**100.0%**

Figure in Italics : OIV estimates
* Carried over from latest available data
Sources: OIV, FAO, Press

[5] Countries with vineyards larger than 45 kha in 2019.

2 • WINE PRODUCTION

World wine production, excluding juices and musts, in 2019[6] is estimated at **260 (259,0) mhl**, marking a sharp decrease of 35 mhl (-11.5%) with respect to the exceptionally high volume recorded in 2018. Overall, after two consecutive years that can be defined as extremely volatile, 2019 brings global wine production back to average levels.

Trends in the main wine-producing countries in the Northern Hemisphere

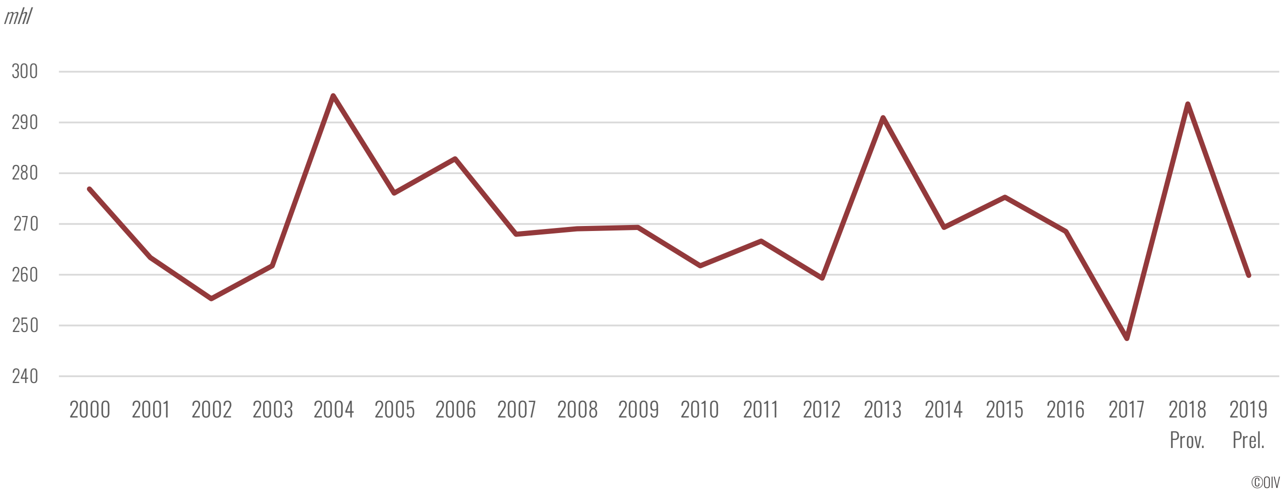
Vinified production in the **EU** in 2019 is estimated at **156 mhl**, a strong decline of 14.4% compared with the volume registered in 2018 (-26.7 mhl). This situation is the result of bad weather conditions - such as spring frost, hail, drought and excess heat - in the main EU producing countries, in contrast with 2018 that saw extremely favourable conditions during the production season.

Italy (47.5 mhl), **France (42.1 mhl)**, and **Spain (33.5 mhl)**, which together account for 48% of world wine production in 2019, saw a sharp decrease in their wine production with respect to 2018.

The production volumes in these three countries recorded respective decreases of -7.3 mhl (-13%), -7.1 mhl (-15%), and -11.4 mhl (-25%) compared with the very high production of 2018. However, while for Italy the 2019 production volume is only 2% less than its last five-year average, for France and Spain the difference is much larger, at -6% and -11% respectively.

Still within the EU, other countries that registered a decrease in production with respect to 2018 are **Germany (9.0 mhl, -12%)**, **Romania (5.0 mhl**, -4%), **Austria (2.5 mhl**, -10%), **Hungary (2.4 mhl**, -34%) and **Greece (1.9 mhl**, -8%). The only EU country that, in 2019, saw an increase in its wine production is **Portugal** with **6.7 mhl** (+10% / 2018). This growth in volume is the combined outcome of favourable weather conditions on one side, and the fact that 2018 Portuguese wine production was relatively low (compared to the rest of the EU countries) on the other

Fig. 3 • Evolution of world wine production (juices and musts excluded)



[6] This is the production resulting from grapes harvested at the start of 2019 in the Southern Hemisphere and at the end of 2019 in the Northern Hemisphere.

In Eastern Europe, weather conditions were favourable in **Russia (4.6 mhl**, +7% / 2018) and **Ukraine (2.1 mhl**, +6% / 2018), while in **Moldova** the harvest was less abundant in 2019 and the vinified production was equal to **1.5 mhl** (-23% / 2018).

In Asia, the new data available for **China** indicate an estimated vinified production of **8.3 mhl** in 2019, marking a decrease of -10% with respect to the already relatively low production level of 2018. This is a sharp decline in wine production for the third year in a row, a signal that the future development of the Chinese wine sector could be more uncertain than expected. A potential explanation for this negative trend is that structural problems (such as difficult climate conditions, technological constraints and low productivity) made the Chinese wine industry less competitive with respect to a highly diversified supply of imported wines sustained by a favourable trade policy promoted by Chinese authorities. As highlighted by many analysts of the sector, it should be also noted that several methodological changes in data collection have occurred in recent years by Chinese authorities, without proper notification, thus making the accuracy and reliability of official data on the wine sector questionable. In light of the above, data have to be interpreted with caution at this stage and might be subject to revision in the future.

In North America, wine production in the **USA** is estimated at **24.3 mhl,** a decrease of 2% compared to 2018. It seems that this slight decline in 2019 does not depend on bad weather conditions or the raging fires that occurred in California in October (harvest took place just before), but it is a response to overcome an oversupply of grapes and wine. In fact, wine sales in California slowed down for two consecutive years (2018-2019), increasing the stocks in wineries, and some vine growers have thus decided not to harvest some vine plots in 2019.

Trends in the main wine-producing countries in the Southern Hemisphere

In **South America**, the overall trend for wine production in 2019 is negative with respect to 2018. However, while in **Argentina (13.0 mhl)** and in **Chile (12.0 mhl)** 2019 vinified productions are lower with respect to 2018 but overall in line or even higher than their five-year averages, **Brazil (2.0 mhl)** registered a sharp decrease in its wine production in 2019 of more than 1 mhl (-34% / 2018). With the exception of 2016, when El Niño devastated the harvest, this is the lowest vinified production level registered in Brazil since the beginning of the century, and can be mainly attributed to bad weather conditions, notably spring hail.

In **South Africa**, 2019 production reached **9.7 mhl**. This represents an increase of +3% with respect to the low volume registered in 2018, but it is still far from the average production levels recorded before the beginning of the drought that heavily impacted the country for three years in a row (2016, 2017 and 2018).

With regard to **Oceania, Australian** wine production registers a decline for the second consecutive year reaching **12.0 mhl** in 2019 (-6% / 2018). In **New Zealand** wine production was **3.0 mhl** in 2019, a slight decrease of -1% with respect to 2018, but overall in line with its average level over the last 5 years.

Figure 4 • Wine production (juices and musts excluded) in major countries[7]

mhl	2015	2016	2017	2018 Prov.	2019 Prel.	2019/2018 % Var.	2019 % world
Italy	50.0	50.9	42.5	54.8	47.5	-13%	18.3%
France	47.0	45.4	36.4	49.2	42.1	-15%	16.2%
Spain	37.7	39.7	32.5	44.9	33.5	-25%	12.9%
USA	*21.7*	*23.7*	*23.3*	*24.8*	*24.3*	-2%	9.4%
Argentina	13.4	9.4	11.8	14.5	13.0	-10%	5.0%
Australia	11.9	13.1	13.7	12.7	12.0	-6%	4.6%
Chile	12.9	10.1	9.5	12.9	11.9	-7%	4.6%
South Africa	11.2	10.5	10.8	9.4	9.7	3%	3.7%
Germany	8.8	9.0	7.5	10.3	9.0	-12%	3.5%
China mainland	*13.3*	*13.2*	*11.6*	*9.3*	*8.3*	-10%	3.2%
Portugal	7.0	6.0	6.7	6.1	6.7	10%	2.6%
Romania	3.6	3.3	4.3	5.1	4.9	-4%	1.9%
Russia	5.6	5.2	4.5	4.3	4.6	7%	1.8%
New Zealand	2.3	3.1	2.9	3.0	3.0	-1%	1.1%
Austria	2.3	2.0	2.5	2.8	2.5	-10%	0.9%
Hungary	2.6	2.5	2.5	3.6	2.4	-34%	0.9%
Ukraine	1.1	1.1	1.9	2.0	*2.1*	6%	0.8%
Brazil	2.7	1.3	3.6	3.1	2.0	-34%	0.8%
Greece	2.5	2.5	2.6	2.2	2.0	-8%	0.8%
Georgia	1.2	0.9	1.0	1.7	1.8	1%	0.7%
Moldova	1.6	1.5	1.8	1.9	1.5	-23%	0.6%
Switzerland	0.9	1.1	0.8	1.1	1.0	-12%	0.4%
Other countries	13.9	13.1	12.9	14.0	14.3	2%	5.5%
World total	**275**	**269**	**248**	**294**	**260**	**-11%**	**100%**

Figure in italic: estimate OIV
Sources: OIV, FAO, Press

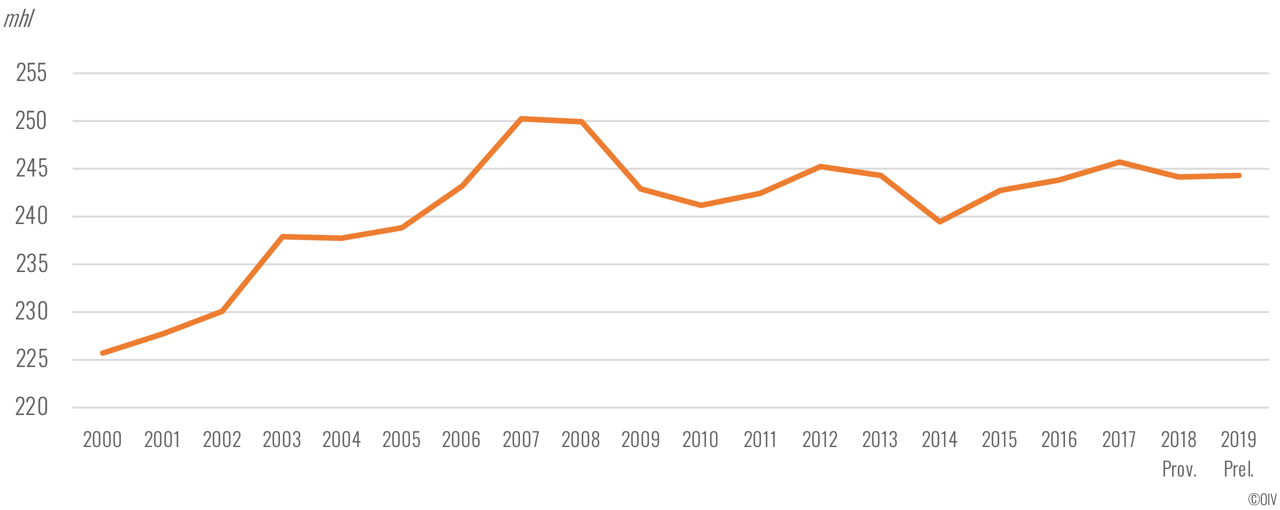
[7] Countries with a wine production equal to or more than 1 mhl in 2019.

3 • WINE CONSUMPTION

World wine consumption in 2019 is estimated at **244 mhl**, marking a +0.1% increase compared to 2018. After the slight decline in world wine consumption registered in 2018, mainly explained by negative growth rates in China, Russia, and Argentina, as well as in some important EU countries like France, Italy, and the UK, in 2019 the trend seems to have inverted.

However, it should be noted that, given the margin of error in tracking global wine consumption, this figure should be considered with caution.

Figure 5 • Evolution of world wine consumption in 2019



Trends in the main wine consuming countries

Estimates of national consumption levels presented in this chapter should be interpreted cautiously, given the intrinsic limitations of the "apparent consumption" methodology, especially for the numerous countries where data on stocks variations, losses or industrial uses of wine, are not fully known or assessed.

In 2019 the **EU**, which accounts for 53% of the world consumption, consumed an estimated volume of wine of about **128 mhl**, a figure in line with recent years. This is the result of the counterbalancing among countries with opposite trends. If, on one the one hand, there are countries like **Italy (22.6 mhl**, +0.9%), **Germany (20.4 mhl**, +2%), **UK (13 mhl**, +1%), and **Spain (11.1 mhl**, +2.3%) that increased their consumption with respect to 2018, on the other hand all the other EU member states, including for example **France (26.5 mhl**, -0.6%), **Portugal (5.0 mhl**, -2.7%), the **Netherlands (3.5 mhl**, -1.8%) and **Belgium (2.7 mhl**, -2.5%), show a negative trend with respect to 2018.

The **USA** confirm their position as the world's largest wine consuming country also in 2019, reaching a record-high **33.0 mhl**. According to this estimate internal demand has increased (+1.8% / 2018), although to a lesser extent than the previous year (when the year-over-year growth rate was almost +3%).

Concerning **China**, 2019 wine consumption is estimated at **17.8 mhl**, showing a 3.3% drop with respect to 2018. In light of this decline for the second consecutive year, the rapid growth in consumption that has characterized the last 20 years appears to have come to an end. However, this apparent consumption should be interpreted carefully because low production levels - like the ones recorded in 2018 and 2019 - can strongly impact the estimation of 2019 wine consumption volume.

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Japan is the second highest consuming country in Asia (and 15th in the world), recording a stable level of consumption for the sixth consecutive year at **3.5 mhl**.

In **South America**, overall wine consumption increased in 2019 compared to 2018, with **Argentina** at **8.5 mhl** (+1.3%), **Brazil** at **3.3 mhl** (+0.5%), and **Chile** at **2.4 mhl** (+4.6%).

A decline in consumption was registered in **South Africa** **(4.0 mhl**, -6.2% / 2018), which is back to its 2014 level, after four consecutive years at more than 4.3 mhl.

In **Australia**, wine consumption is estimated at **5.9 mhl,** a value in line with the high levels observed in 2017 and 2018.

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Figure 6• Wine consumption in major countries[8]

mhl	2015	2016	2017	2018 Prov.	2019 Prel.	2019/2018 % Var.	2019 % world
USA	*30.9*	*31.3*	*31.5*	*32.4*	*33.0*	1.8%	13%
France	27.3	27.1	27.0	26.7	26.5	-0.6%	11%
Italy	21.4	22.4	22.6	22.4	22.6	0.9%	9%
Germany	20.5	20.2	19.7	*20.0*	*20.4*	2.0%	8%
China mainland	*18.1*	*19.2*	*19.3*	*18.4*	*17.8*	-3.3%	7%
UK	12.8	12.9	13.1	12.9	*13.0*	1.0%	5%
Spain	9.8	9.9	10.5	10.9	11.1	2.3%	5%
Russia	*9.7*	*10.1*	*10.4*	*9.9*	*10.0*	0.9%	4%
Argentina	10.3	9.4	8.9	8.4	8.5	1.3%	3%
Australia	5.5	5.4	5.9	6.0	5.9	-1.0%	2%
Portugal	4.8	4.7	5.2	5.1	5.0	-2.7%	2%
Canada	*4.8*	*5.0*	*5.0*	*4.9*	*4.7*	-3.4%	2%
South Africa	4.3	4.4	4.5	4.3	4.0	-6.2%	2%
Romania	4.0	3.8	4.1	3.9	3.9	0.0%	2%
Japan	*3.5*	*3.5*	*3.5*	*3.5*	*3.5*	1.0%	1%
Netherlands	*3.5*	*3.6*	*3.7*	*3.6*	*3.5*	-1.8%	1%
Brazil	3.3	3.1	3.3	3.3	3.3	0.5%	1%
Switzerland	2.8	2.7	2.7	2.6	2.7	1.4%	1%
Belgium	*3.0*	*2.8*	*2.8*	*2.7*	*2.7*	-2.5%	1%
Chile	2.6	2.4	2.3	2.3	*2.4*	4.6%	1%
Hungary	2.5	2.6	2.4	*2.7*	*2.5*	-8.5%	1%
Sweden	2.3	2.4	2.3	*2.3*	*2.3*	-0.8%	1%
Austria	2.4	2.4	2.4	2.4	2.3	-4.1%	1%
Czech Republic	2.1	2.1	2.2	2.1	*2.1*	1.3%	1%
Greece	2.4	*2.4*	*2.4*	*2.2*	*2.0*	-8.7%	1%
Other countries	30.8	30.4	30.2	30.6	30.7	0.2%	13%
World total	**243**	**244**	**246**	**244**	**244**	**0.1%**	**100%**

Figure in italic: estimate OIV
Sources: OIV,FAO, Press

[8] Countries with wine consumption equal to or more than 2 mhl in 2019.

4 • INTERNATIONAL TRADE OF WINE

In 2019 the world wine export market – considered here as the sum of the exports of all countries – has expanded with respect to 2018 both in volume, estimated at **105.8 mhl** (+1.7%), and in value, with **31.8 bn EUR**[9] (+0.9%).

Trade volume

After a record-high export volume in 2017 which compensated the historically low production that year and low export volume recorded in 2018 as a consequence of the exceptional production volume of 2018, in 2019 global exports seem back on track with the growth path started in 2013. Italy was the largest exporter with 21.6 mhl, accounting for 20.5% of the global market.

Developments in export volumes at country level in 2019 are quite heterogeneous.

Strong increases can be observed in exports from Italy (+2.0 mhl), Spain (+1.3 mhl), Canada (+0.4 mhl) and Chile (+0.3 mhl). However, significant reductions in exports are recorded for Australia (-1.1 mhl), South Africa (-1.0 mhl), Ukraine (-0.4 mhl) and Hungary (-0.3 mhl).

Trade value

In 2019 the global value of wine exports is on the sustained growth path started in 2010 reaching a new record high. France was still the most important world exporter in terms of value, with 9.8 bn EUR exported in 2019. There were rises in the value of exports in many large exporting countries like France (+425 m EUR), Italy (+211 m EUR), and New Zealand (+84 m EUR). The largest declines concerned Spain (-234 m EUR) and South Africa (-73 m EUR).

Figure 7 • Evolution of international trade of wine by volume

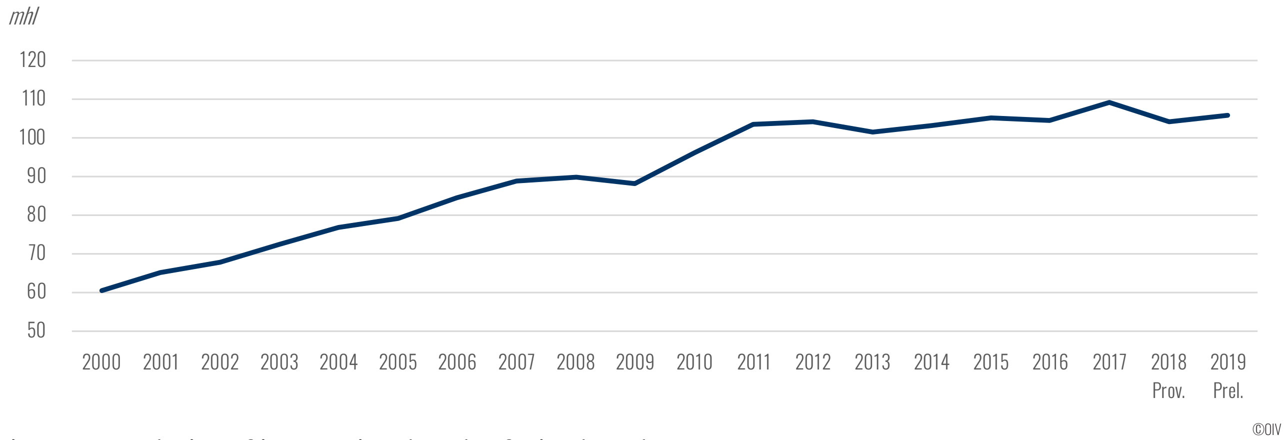
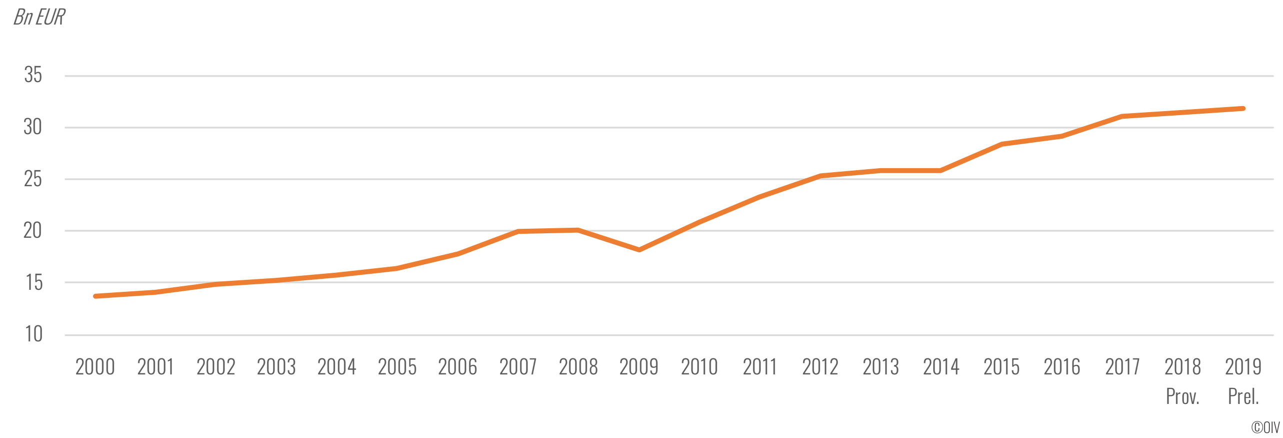


Figure 8 • Evolution of international trade of wine by value



[9] Based on the tracking of 92 countries via the Global Trade Atlas customs data.

Trade by product type

Bottled wines (< 2 litres) represented 53% of trade volumes globally, a share in line with 2018. Among the major exporting countries, the bottled export share was very high in terms of volume in 2019 in **France** (71%), **Germany** (74%), **Portugal** (80%), and **Argentina** (67%). Bottled wines constituted 70% of the total value of wines exported in 2019 throughout the world.

Sparkling wine once again saw a significant growth in 2019, both in terms of volume (+2.5% / 2018) and value (+4.9% / 2018). This can be partially explained by the ongoing trend for the Italian Prosecco wine throughout the world. A significant share of exports from **Italy, France**, and **Spain** exports in terms of volume consisted of sparkling wines (19%, 14%, and 9% respectively). Despite the relatively small share in terms of volume (9%), sparkling wines represented 21% of the world export market in terms of value.

After an abundant wine production in 2018, **bulk wine (> 10 litres)** exports in 2019 show - as expected - a large increase in volume (+4.9%), together with a sharp decline in value (-6.6%).

The countries for which the bulk share of export volumes was significant are **Spain** (55%), the **USA** (55%), **South Africa** (50%), **Australia** (46%), and **Chile** (42%). With respect to 2018, bulk export volumes increased significantly in **Italy** (+29%), **Argentina** (+26%), **Chile** (+13%), **Spain** (+12%), and **France** (+12%), yet sharply declined in **Germany** (-19%), **Australia** (-18%), and **South Africa** (-17%). Bulk wines comprised 8% of the total value of wine exports, despite representing 34% of the volume of the world export market in 2019.

Since 2017, the new subheading 2204.22 has been introduced into the customs Harmonised System (HS). This subheading identifies wines in containers holding more than 2 litres but less than 10 litres, more commonly referred to as **Bag-in-Box® (BiB)**. For this category, that in 2019 represents 4% of world export volumes, and 2% of the total value, **Germany**, **South Africa**, and **Portugal** were the biggest exporters in volume.

Figure 9 • World wine export market

<table>
<tr><th colspan="2">Volume (mhl)</th><th colspan="2">Value (bn EUR)</th><th rowspan="2">Type</th><th colspan="2">Structure in 2019</th><th colspan="2">Variation 2019/2018</th></tr>
<tr><th>2018</th><th>2019</th><th>2018</th><th>2019</th><th>volume</th><th>value</th><th>volume</th><th>value</th></tr>
<tr><td rowspan="3">104.1</td><td rowspan="3">105.8</td><td rowspan="3">31.5</td><td rowspan="3">31.8</td><td>bottle (< 2 l)</td><td>53%</td><td>70%</td><td>+0.5%</td><td>+0.7%</td></tr>
<tr><td>sparkling</td><td>9%</td><td>21%</td><td>+2.5%</td><td>+4.9%</td></tr>
<tr><td>BiB</td><td>4%</td><td>2%</td><td>-13.1%</td><td>-1.2%</td></tr>
<tr><td colspan="2">variation of +1.7%</td><td colspan="2">variation of +0.9%</td><td>bulk (> 10 l)</td><td>34%</td><td>8%</td><td>+4.9%</td><td>-6.6%</td></tr>
</table>

Sources: OIV, GTA

Main wine exporters

In 2019 the international trade of wine in terms of volume was mainly dominated by three European countries - **Italy**, **Spain**, and **France** - that together exported 57.1 mhl, accounting for 54% of the world market. The share in volume of these three countries increased with respect to 2018 when it was 52%. This relative increase can be mainly attributed to Italy (+10% / 2018) and Spain (+6.5% / 2018). Among the other large exporting countries, positive annual growth rates were registered in **New Zealand** (+5.1%), **Chile** (+3.0%), **Germany** (+2.0%), the **USA** (+1.9%) and **Portugal** (+0.3%).A decrease in export volumes in 2019 was observed in **Australia** and **South Africa**, with respectively -12.5% and -23.5%.

France, Italy and Spain are the main exporters also in terms of value in 2019, with 9.8 bn EUR, 6.4 bn EUR

and 2.7 bn EUR respectively. These three countries account for 60% of the total value of wine exported in 2019. An increase in value with respect to 2018 was recorded in **New Zealand** (+8.3%), **France** (+4.6%), **Italy** (+3.4%), **Portugal** (+2.5%), **Chile** (+2.1%), **Argentina** (+1.2%), the **USA** (+0.9%), and **Australia** (+0.2%). A decrease in value of exports was recorded in **South Africa** (-11.0%), **Spain** (-8.0%) and **Germany** (-0.5%) compared to 2018.

Figure 10 • Main exporters of wine[10]

	Volume (mhl)		Value (bn EUR)	
	2018	2019	2018	2019
Italy	19.6	21.6	6.2	6.4
Spain	20.0	21.3	2.9	2.7
France	14.2	14.2	9.3	9.8
Chile	8.4	8.7	1.7	1.7
Australia	8.5	7.4	1.8	1.8
Germany	3.7	3.8	1.0	1.0
United States	3.5	3.6	1.2	1.2
South Africa	4.2	3.2	0.7	0.6
Portugal	3.0	3.0	0.8	0.8
Argentina	2.8	2.7	0.7	0.7
New Zealand	2.6	2.7	1.0	1.1

Sources: OIV, GTA
a) Countries with export volumes in 2019 over 2 mhl

[10] Countries with export volumes equal to or above 2 mhl in 2019

Main wine importers

In 2019 the top three importers in terms of volumes were **Germany**, the **UK**, and the **USA**, which together imported **40.4 mhl**, **reaching 38% of world total**. These three countries represent 39% of the total value of world wine imports, reaching **11.9 bn EUR**.

The first importer in 2019 is still **Germany** with **14.6 mhl**, even if its wine import volume decreases by 0.6% compared to 2018. This decrease is even more accentuated in terms of value, with a decline of 4.2%, reaching 2.6 bn EUR. Bulk wine represents the largest share (59%) of German imports that increases in volume (+4% / 2018) but declines in value (-13% / 2018). Bottled imports, which represent 35% in volume and 63% in value, decrease both in volume (-7%) and in value (-1%) compared to 2018.

The **United Kingdom** ranks as second major importer in 2019 in terms of volume, with **13.5 mhl**, and in terms of value, with 3.8 bn EUR. BiB is in 2019 the type of packaging that increased the most in import volume (+10% / 2018) and value (+19% / 2018). Sparkling wine represents 63 % of the total import value in 2019, increasing by 7% with respect to 2018.

The **USA**, in 2019, registered a notable increase with respect to 2018, both in the volume imported (+7.1%) reaching **12.3 mhl** and in value (+5.7%) reaching **5.5 bn EUR**.

These figures confirm the USA as third importer by volume and first by value. Sparkling wine, which represents 12% in volume and 73% in value, is the category that increased the most in terms of volume (+13%), while in value bulk wine grew by +33% with respect to 2018.

France, with **7.2 mhl**, saw a growth of 3% in import volumes between 2018 and 2019, while in value registered a loss of 8.4%. Bulk wine represents 79% of the volumes imported in 2019 which increased by 7% with respect to 2018. Sparkling wine was the category that registered the largest growth in volume (+11%).

China for the second consecutive year saw a significant decline in its imported volumes (-11% / 2018), reaching **6.1 mhl** in 2019. In terms of value, the trend is similar, with an overall downfall of -9.7% compared to 2018, reaching 2.1 bn EUR. The only category that increased both its volume (+8%) and its value (+8%) is sparkling wine, although it represents only 2% of the total imported volume.

Among other large importers, the largest increases in volume were recorded in **Portugal (2.9 mhl**, +46% / 2018), **Russia (4.5 mhl**, +10% / 2018), and **Japan (2.8 mhl**, +7.2% / 2018). These three countries increased the value of their wine imports in 2019 by 9%, 16%, and +13% respectively.

Figure 11 • Main importers of wine[11]

	Volume (mhl)		Value (bn EUR)	
	2018	2019	2018	2019
Germany	15	14.6	2.7	2.6
UK	13	13.5	3.5	3.8
USA	12	12.3	5.2	5.5
France	7	7.2	0.9	0.9
China	7	6.1	2.4	2.2
Russia	4	4.5	0.9	1.0
Netherlands	4	4.2	1.2	1.2
Canada	4	4.2	1.7	1.7
Belgium	3	3.1	1.0	1.0
Portugal	2	2.9	0.1	0.2
Japan	3	2.8	1.4	1.6
Sweden	2	2.1	0.7	0.7

Sources: OIV, GTA

[11] Countries with import volumes equal to or over 2 mhl in 2019.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