OIV
Organisation Internationale
de la Vigne et du Vin

STATE OF THE VITIVINICULTURE WORLD MARKET

May 2014

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Abbreviations:

kha: thousands of hectares
Mha: millions of hectares
khl: thousands of hectolitres
Mhl: millions of hectolitres

1. Vitivinicultural production potential

1.1 The areas under vines in European vineyards

Since the end of the European Union (EU) programme to regulate wine production potential, under which the EU introduced permanent abandonment premiums for vineyards[1], the rate of decline of EU vineyards[2] has significantly slowed. Although between 2011 and 2012 the EU area under vines decreased by 54 kha, between 2012 and 2013 EU vineyards only declined by 19 kha overall. The total vineyards (vines for wine grapes, table grapes or grapes for drying, in production or awaiting production) even grew by 5 kha in Spain, while Italian, Portuguese and French vineyards each declined by 6-7 kha.

European vineyards should start at 3481 kha in 2013, a decrease of 0.5% between 2012 and 2013.

Table 1
Areas under vines in European vineyards

Thousands of hectares	**2011**	**2010**	**2012**	**2013 Forecast**
Austria	47	46	44	44
Germany	102	102	102	102
Bulgaria	81	83	78	78
Spain	1082	1032	1018	1023
France	818	806	800	794
Greece	112	110	110	110
Hungary	68	65	64	63
Italy	795	776	759	752
Portugal	244	240	236	229
Romania	204	204	205	205
EU-28 total	**3654**	**3554**	**3500**	**3481**

*Vines for wine grapes, table grapes or grapes for drying, in production or awaiting production
Source: OIV, OIV Experts, Trade Press

[1] Council Regulation (EC) No. 479/2008 of 29 April 2008 on the common organisation of the market in wine.
[2] The EU now composed of 28 Member States.

1.2 Outside the EU

The information in Table 2 shows that **vineyards outside Europe** appear to have **grown slightly** between 2012 and 2013 (+19 kha). This moderate overall increase is the result of contrasting developments.

In China and South America (except Brazil, which seems to be proceeding with a significant restructuring of its vineyards), the total area under vines has continued to increase: these areas are the main vineyard growth centres in the world. Turkey has seen a break in the downward trend observed in previous years with a vineyard increase of 7 kha.

Table 2
Total areas under vines in vineyards* outside the EU

Thousands of hectares	**2011**	**2010**	**2012**	**2013 Forecast**
South Africa	132	131	131	130
Argentina	217	218	221	224
Australia	171	170	162	158
Brazil	92	90	91	*87*
Chile	200	200	205	*207*
China	539	*560*	*580*	*600*
United States	404	407	407	*408*
New Zealand	37	37	38	38
Russia	62	63	62	63
Turkey	514	508	497	*504*
Other African countries	237	242	239	239
Other American countries	84	86	88	87
Other Asian countries	616	615	615	615
Total outside the EU	**3933**	**3955**	**3936**	**3955**

*Vines for wine grapes, table grapes or grapes for drying, in production or awaiting production
Source: OIV, OIV Experts, Trade Press

Conversely, Australia recorded a decline in its vineyards for a second consecutive year, even if they only declined by half as much (-4 kha) as for between 2011 and 2012. Overall, **outside of the EU**, vineyards should reach **3955 kha** in 2013, a relatively moderate increase of 0.5% in relation to 2012 (compared with -0.5% between 2011 and 2012 - a development particularly marked at the time by the further decline in CIS vineyards).

In 2013, the total world area under vines (including the area not yet in production, whether harvested or not, and regardless of the grapes' final destination) **should therefore remain stable in relation to that of 2012 at 7436 kha.**

2. Wine production[3]

2.1 Within the European Union

2013 EU vinified production may be described as average. Wine production indeed began at quite a significantly higher level than the very low 2012 production (146 Mhl), nearing production levels for the 2007-2009 period.
2013 production (excluding juice and musts) should reach 164.2 Mhl, a rise of 12.5 %/2012.

This situation is the result of fairly consistent developments. Indeed, compared with the extremely low 2012 production, in everywhere aside from Germany (8.3 Mhl in 2013, which is -8%/2012) the expected developments were either stable or positive.
The **very high increase in production in Spain**, where a record harvest of **52.5 Mhl (including juice and musts)** was recorded, should be noted. This situation exceptionally led to Spain not vinifying 7.9 Mhl (compared with 5-6 Mhl normally).

Thus, given an **Italian production** (excluding juice and musts) of almost **45 Mhl** and the slow growth of 2013 **French production** compared with that of 2012 (which nevertheless in itself was very low at **42 Mhl in 2013** compared with 41.1 in 2012), **Spain, with 44.7 Mhl vinified** in 2013, was the second largest wine producer in the world after Italy.
It should also be noted that, without returning to their production levels at the end of the 2000s, **Hungarian and Romanian productions grew** compared with their extremely low 2012 productions (+47 and +29%/2012 respectively).

2.2 Outside the European Union

In the main countries in the southern hemisphere, the United States and China, **production levels (excluding juice and musts) reached 79.3 Mhl in 2013**, which is a noticeable increase (almost +8%) compared with 2012. This overall trend reflects contrasting developments, as outlined below.

The **United States** recorded a significant wine production in 2013 at **22 Mhl** excluding juice and musts, particularly in California: +7% compared with 2012.

In South America, **Chile** recorded a **record production** once again, reaching **12.8 Mhl** (+2% compared with the previous 2012 record). Meanwhile, **in 2013 Argentina returned to a wine production in line with its potential** (15 Mhl compared with 11.8 Mhl last year, which is +27%)[4]. **Brazil** recorded a decline again in 2013, with a vinified production of 2.7 Mhl, a level which is very close to the low 2009 production.

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[3] This is the wine production resulting from grapes harvested in autumn 2013 in the northern hemisphere and in spring of the same year in the southern hemisphere.
[4] A "normal" production of juice and musts (at 6.6 Mhl).

In **South Africa**, vinified production reached a very high level at nearly 11 Mhl (compared with 10.6 Mhl in 2012, which is +4%).

While **Australian production** continued its recovery to reach **12.5 Mhl (+1%/2012)**, **New Zealand production** hit a new record of **2.5 Mhl** in 2013 after the previous record (of 2.35 Mhl) dating back to 2011.

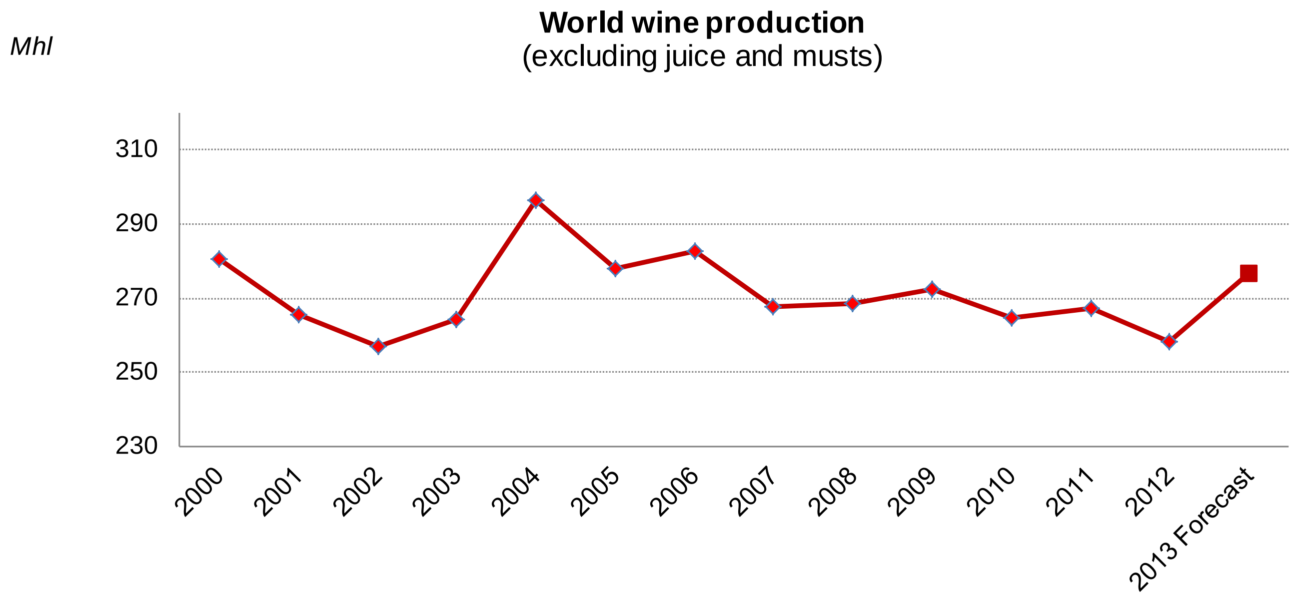
Finally, the production in **China**, which with 11.7 Mhl recorded a decrease of 2.1 Mhl compared with the previous year (-15%), should be noted.

Table 1: Wine production (excluding juice and musts) (1)

Unit: 1000 hl	2009	2010	2011	2012	2013 Forecast	2013/2012 Variation in volume	2013/2012 Variation in %	Ranking
Italy	47 314	48 525	42 772	43 816	44 900	1 084	2%	1
Spain	36 093	35 353	33 397	31 123	44 729	13 606	44%	2
France	46 269	44 381	50 764	41 059	42 016	957	2%	3
United States (2)	21 965	20 887	19 187	20 510	*22 000*	1 490	7%	4
Argentina	12 135	16 250	15 473	11 778	14 984	3 206	27%	5
Chile	10 093	8 844	10 464	12 554	12 800	246	2%	6
Australia	11 784	11 420	11 180	12 315	12 456	142	1%	7
China	12 800	13 000	13 200	13 816	11 700	-2 116	-15%	8
South Africa	9 986	9 327	9 725	10 550	10 972	422	4%	9
Germany	9 228	6 906	9 132	9 012	8 300	-712	-8%	10
Portugal	5 868	7 133	5 610	6 308	6 740	432	7%	11
Romania	6 703	3 287	4 058	3 311	4 276	966	29%	12
Greece	3 366	2 950	2 750	3 115	3 700	585	19%	13
Hungary	3 198	1 762	2 750	1 776	2 618	842	47%	14
New Zealand	2 050	1 900	2 350	1 940	2 484	544	28%	15
Austria	2 352	1 737	2 814	2 125	2 354	229	11%	16
Bulgaria	1 427	1 224	1 237	1 337	1 305	-32	-2%	17
OIV World Total(3)	**272 217**	**264 495**	**267 413**	**254 671**	***278 600***	**23 929**	**9.4%**	

(1): Countries for which information has been provided with a wine production of more than 1 Mhl
(2): OIV estimation base: California harvest +10% (WineInstitute), equivalent productions in the states of NY and WA, and -50%/2012 elsewhere in the other regions of Idaho and Colorado, poor harvests (now -50%/2012): that is, +7% for the USA

These developments have resulted in a **2013 world wine production (excluding juice and musts) of 278.7 Mhl, which is +24 Mhl** compared with 2012 production. This global wine production may therefore be described as average to high.



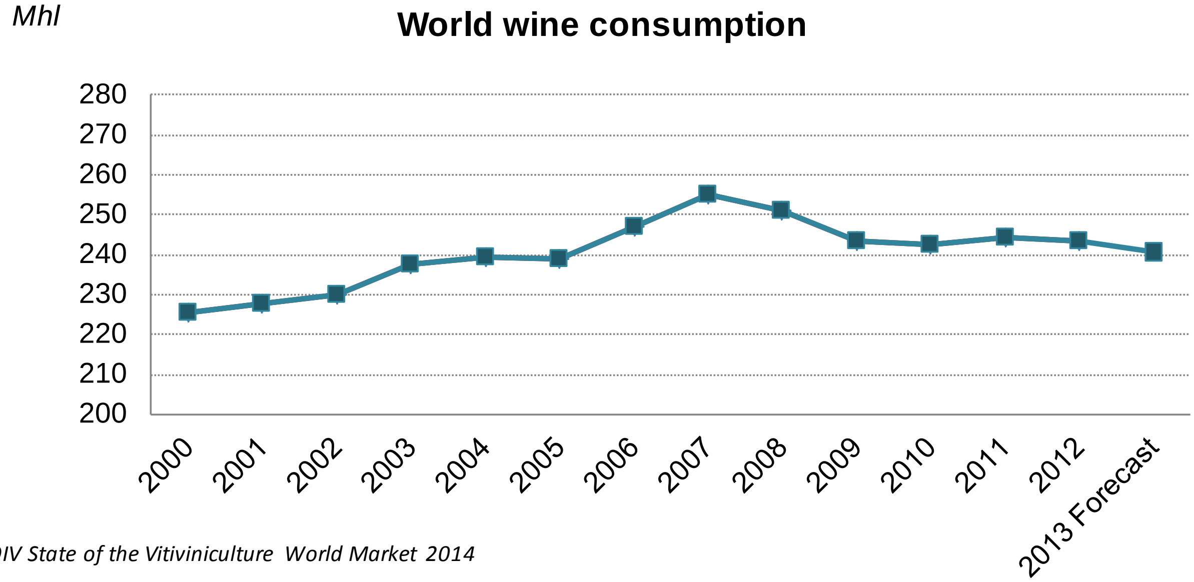
OIV State of the Vitiviniculture World Market 2014

3. Evaluation of world consumption

The long-awaited recovery that will mark the end of the financial and subsequently economic crisis, which began in 2008, is still to take place. Furthermore, the 2012 vitivinicultural year was marked by a very low level of world production that restricted world consumption levels at the end of 2012, and particularly in 2013. Indeed, with 2012 production following on from a succession of modest productions, stocks were low at the start of the 2012/13 harvest - although there were some regional exceptions to this macroeconomic vision.

All of this resulted in a 2013 world wine consumption of between 234.4 and 243.1 Mhl, corresponding to 238.7 Mhl at the mid-range estimate (-2.5 Mhl/2012, which is -1.0%). Given the margin of error with respect to monitoring world consumption, this should be viewed with caution. Since the 2008 crisis, world consumption appears to have stabilised overall: 240.9 Mhl in 2009, 240.3 in 2010, 241.2 in 2011, 241.2 in 2012.

Figure 2 - World wine consumption trends



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The wine market: evolution and trends

May 2014

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Abbreviations:

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€/l: euro per litres
Mill l.: millions of litres
Mill €: millions of euro

1. Wine consumption

The long-awaited recovery that will mark the end of the financial and subsequently economic crisis, which began in 2008, is still to take place. Furthermore, the 2012 vitivinicultural year was marked by a very low level of world production that restricted world consumption levels at the end of 2012, and particularly in 2013.

In **Europe**, in line with the trends of previous years, traditional consumer countries resumed their decline between 2012 and 2013: a decrease of 2.1 mhl in France (28.1 mhl of wines consumed), 0.8 mhl in Italy (21.7 mhl) and 0.2 mhl in Spain (9.1 mhl).

In Portugal (4.5 mhl) and the United Kingdom (12.7 mhl) consumption remained stable, while in Germany (20.3 mhl) a slight increase was recorded.

Table 1
Wine consumption in several countries in Europe

Thousands of hectolitres	**2012**	**2013 Forecast**	**2013 / 2012 Difference**
Germany	20 000	20 300	300
Austria	2 756	2 619	-137
Belgium+Luxembourg	3 132	3 054	-78
Denmark	1 822	1 802	-20
Spain	9 300	9 100	-200
Finland	599	621	22
France	30 269	28 181	-2 088
Greece	3 068	3 300	232
Hungary	1 995	1 925	-70
Ireland	802	845	43
Italy	22 633	21 795	-838
The Netherlands	3 636	3 585	-51
Portugal*	4 600	4 551	-49
United Kingdom	12 801	12 738	-63
Sweden	2 066	2 120	54
Switzerland	2 654	2 650	18
Total	**122 133**	**119 186**	**-2 925**

* Most recent year available

Sources: OIV, OIV Experts, EU per harvest + panels & National Statistics Offices

The United States, with 29.1 mhl of wines consumed (excluding vermouth and special wines), **became the primary internal market in the world in terms of volume in 2013**. However, its rate of growth in recent years did not continue between 2012 and 2013 (only +0.15 mhl: +0.5%/2012 compared with, for example, +2% between 2011 and 2012). This "post-financial crisis" rate of increase in the internal market is nevertheless seemingly lower than that recorded before the crisis (between 2001 and 2007, consumption was indeed increasing by more than 1 mhl/year).

With regard to **China, the rapid increase in consumption since the beginning of the 2000s appears to have come to a sudden end.** Its recent trend is approached here considering the rolling development[1] over two years of apparent consumption.
Despite the 2013 information relating to a reduction in production (from 13.8 mhl in 2012 to 11.8 mhl in 2013[2]) and imports (from 3.95 mhl in 2012 to 3.75 mhl in 2013[3]), this approach results in the indirect inclusion of stocks (which the observers considered to be at a high level), thereby diminishing the effect of the reduced "supply" (in terms of production + imports) on the estimated level of consumption.
Chinese wine consumption is thus evaluated at 16.8 mhl in 2013, **a decrease of 3.8% between 2012 (17.5 mhl) and 2013.**

Table 2
Wine consumption in several countries outside Europe

Thousands of hectolitres	**2012**	**2013 Forecast**	**2013 / 2012 Difference**
South Africa	3612	3676	64
Argentina	10051	10337	286
Australia	5396	5289	-107
Brazil	3399	3488	89
Chile	3080	3130	50
China	17477	16815	-662
United States	29000	29145	145
New Zealand	919	921	2
Total	**72 934**	**72 801**	**-133**

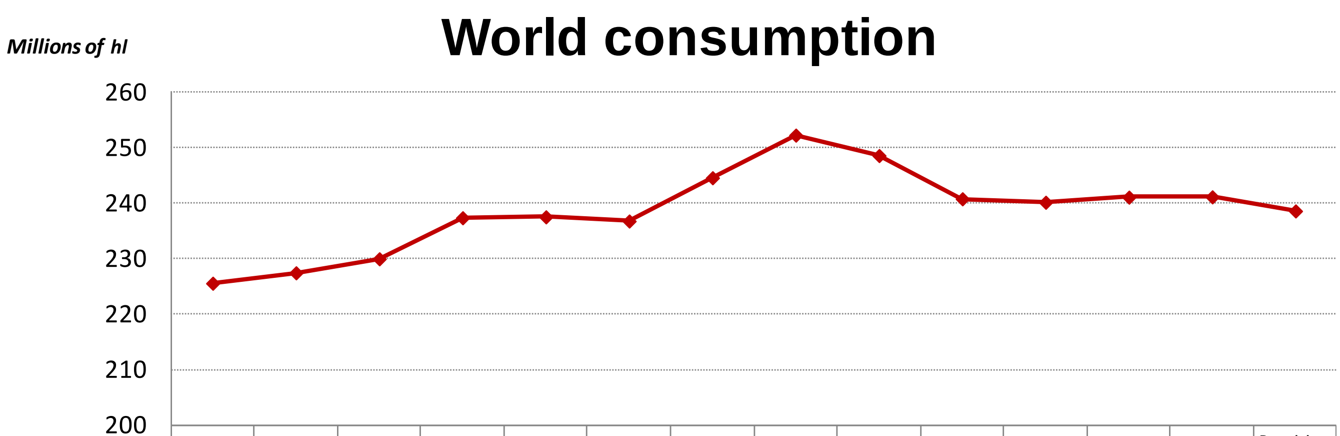
Source: OIV, OIV Experts, Trade Press

The **main South American countries**, namely Argentina, Chile and Brazil, as well as **South Africa,** recorded an **increase in consumption** in 2013 of between 1 and 3% compared with 2012. Meanwhile, Romania, after the very significant decline brought about by the low productions of 2010 and 2012, should see signs of a recovery in consumption levels in 2013 (+24%/2012), even if the absolute value remains fairly low (3.2 mhl).

[1] The development in consumption between year n-1 and year n is considered here to be half determined by the apparent consumption for the current year (calculated by "Production + Imports - Exports") and half by the consumption for the previous year.
[2] National Bureau of Statistics of China
[3] Global Trade Atlas (GTA/GTIS)

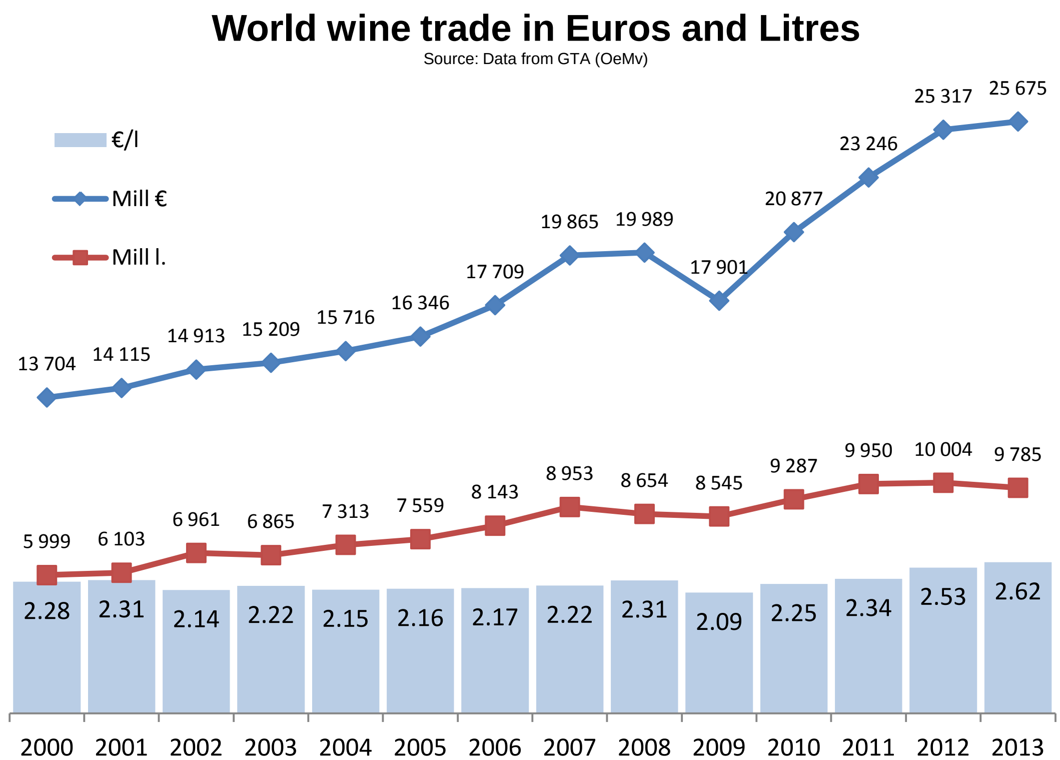
While Switzerland, New Zealand and Hungary experienced stable levels of consumption between 2012 and 2013, Australia suffered a modest reduction in its internal market after several years of steady growth.

All of this resulted in a **world wine consumption of 238.7 mhl**, a fall of 2.5 mhl compared with 2012. Since the 2008 crisis, world consumption appears to have stabilised overall: 240.9 mhl in 2009, 240.3 in 2010, 241.2 in 2011, 241.2 in 2012.



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	Prevision 2013
World total	225.7	227.5	230.1	237.5	237.6	236.9	244.7	252.4	248.7	240.9	240.3	241.2	241.2	238.7

2. Trends in world wine trade in 2013[4]



World wine trade in 2013 (comparative figures all measured in Euros and litres) decreased in volume terms by 2.2%, to 98 million of hl, although growing prices allowed for an increase in total revenues of 1.5% up to 25.7 billion Euros. The relative low harvest in 2012 in the Northern Hemisphere provoked a feeling of scarcity of wine, which pushed prices up to an average of 2.62 Euros per litre. Larger exports from Chile and South Africa could not compensate the reduced availability of wine particularly from Italy and Spain, with bulk flows among producers being the most affected in the first half of the year.

By type of product, the largest reduction in wine trade for the whole year took place among bottled wines, which accounted for 2 million hectolitres out of total decrease of 2.4 million. Sparkling wines were the only ones to increase in volume terms by 3.4% with bulk limiting its initial reduction to only 1% at the end of the year. The cheapest products such as wines in bulk and in containers above 2 litres, as well as must, where the most dramatically affected by increases in prices, which declined for sparkling wines. Despite such changes, bottled wines still account for almost 71% of total wine sales, while sparkling makes 20% of total revenues (although only represents 6.6% of total volume) and wines in bulk and in containers of more than 2 litres account for 11.7% of total value, even though make 38% of total volume.

[4] In collaboration with the Observatorio Español del Mercado del Vino (OeMv)

As regards to sparkling wine, lower average prices derived not from reductions in prices of wines from the most important suppliers (Italy, France and Spain increased them by 3.9%, 0.9% and 1.2% respectively) but from the fact that Italian sparkling (particularly Prosecco), at relatively lower prices than those of French, grew much faster than the rest (27% both in value and volume terms according to ISMEA).

World wine trade by type of product - 2013
Source: Data GTA; ellaborated by OeMv

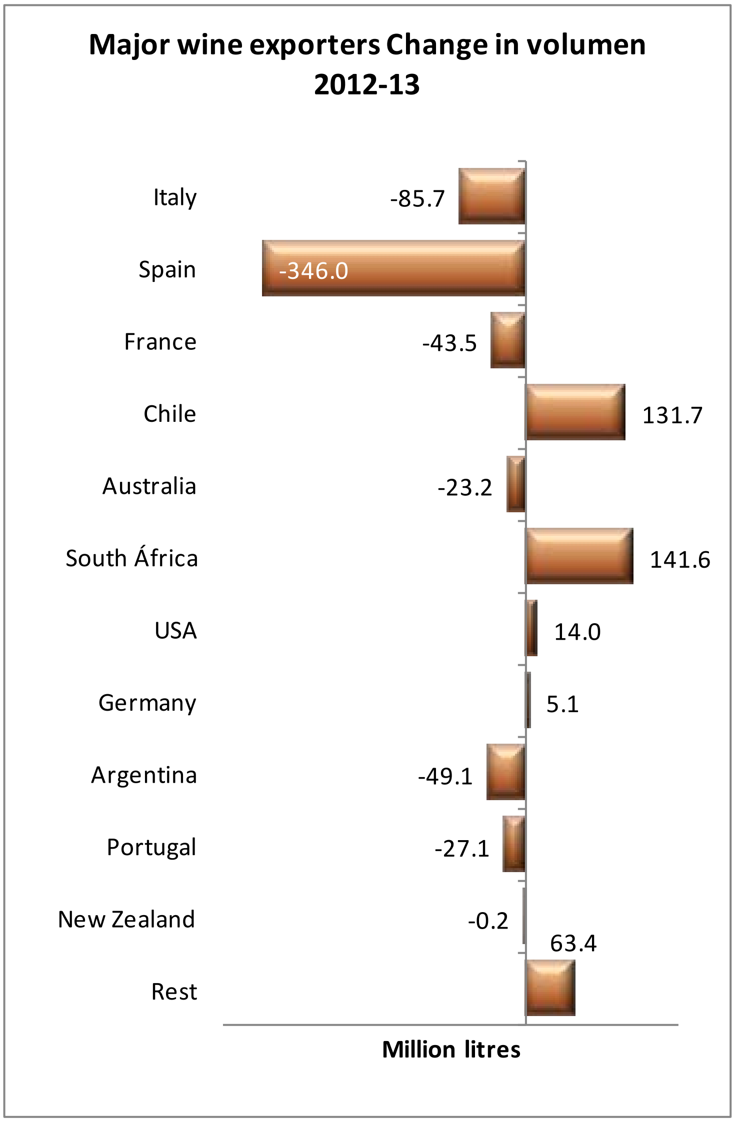
Million €	2012	2013	Chg (M€)	Chg %
Sparkling	4 331.8	4 373.7	41.8	1.0%
Bottled	18 172.5	18 290.1	117.6	0.6%
Bulk & > 2l	2 812.7	3 011.2	198.5	7.1%
Total wine	**25 317.0**	**25 674.9**	**357.9**	**1.4%**
Must	95.6	90.3	-5.3	-5.6%
Wine & must	**25 412.6**	**25 765.2**	**352.6**	**1.4%**

Million l.	2012	2013	Chg (Ml.)	Chg %
Sparkling	628.2	649.8	21.6	3.4%
Bottled	5 627.6	5 426.1	-201.5	-3.6%
Bulk & > 2l	3 748.6	3 709.5	-39.1	-1.0%
Total wine	**10 004.5**	**9 785.4**	**-219.0**	**-2.2%**
Must	89.8	67.0	-22.8	-25.4%
Wine & must	**10 094.3**	**9 852.4**	**-241.8**	**-2.4%**

3. Top wine exporters in 2013

The lack of wine in the Northern Hemisphere, together with the correspondent increase in prices, at the beginning of the year particularly affected exports from Spain and Italy, whose reduction accounted for 4.3 million hectolitres and was not compensated by increase in wine sales from Chile and South Africa which, together, grew by 2.7 million hectolitres more than the previous year.

By groups of producers, the increase of average prices for wine in Europe vis a vis larger exports of bulk and cheaper wine from Chile and South Africa favoured the first group to improve their market share in value terms, while the latter reduced global sales in Euros by 1%.


Major wine exporters Change in volumen 2012-13
Italy
-85.7
Spain
-346.0
France
-43.5
Chile
131.7
Australia
-23.2
South África
141.6
USA
14.0
Germany
5.1
Argentina
-49.1
Portugal
-27.1
New Zealand
-0.2
63.4
Rest
Million litres

Exports of top wine producers - Exports of wine

Source: GTA / OeMv

Million €	2012	2013	2012	2013	Chg M€	Chg %
France	7 840.1	7 812.1	16 607	17 007	400.7	2.4%
Italy	4 660.0	5 005.0				
Spain	2 424.2	2 466.9				
Germany	978.5	998.9				
Portugal	703.8	724.4				
Chile	1 387.7	1 409.2	6 031	5 970	-61.0	-1.0%
Australia	1 521.5	1 337.2				
USA	1 076.7	1 173.8				
New Zealand	767.9	773.1				
Argentina	711.2	657.7				
South África	566.1	618.9				
Top producers	**22 637.6**	**22 977.4**	**22 638**	**22 977**	**339.7**	**1.5%**

4. Top wine importers in 2013

Among the top world importers of wine[5] France experienced the largest reduction in terms of volume (low price bulk wines coming particularly from Spain), although increased her cost by 3.6% up to 649 million Euros. The USA also imported less but more expensive wine, keeping its first place in the ranking of world wine importers, even further from second, UK, who decreased the value of its purchase by 5.2% last year. Germany stands first in terms of imported volume with more than 15 million hectolitres (-1.7%) of more expensive wines. Russia, ranking fourth in terms of volume behind France, also experienced strong price increase, leading to an 11.9% growth in euros up to 912 million.

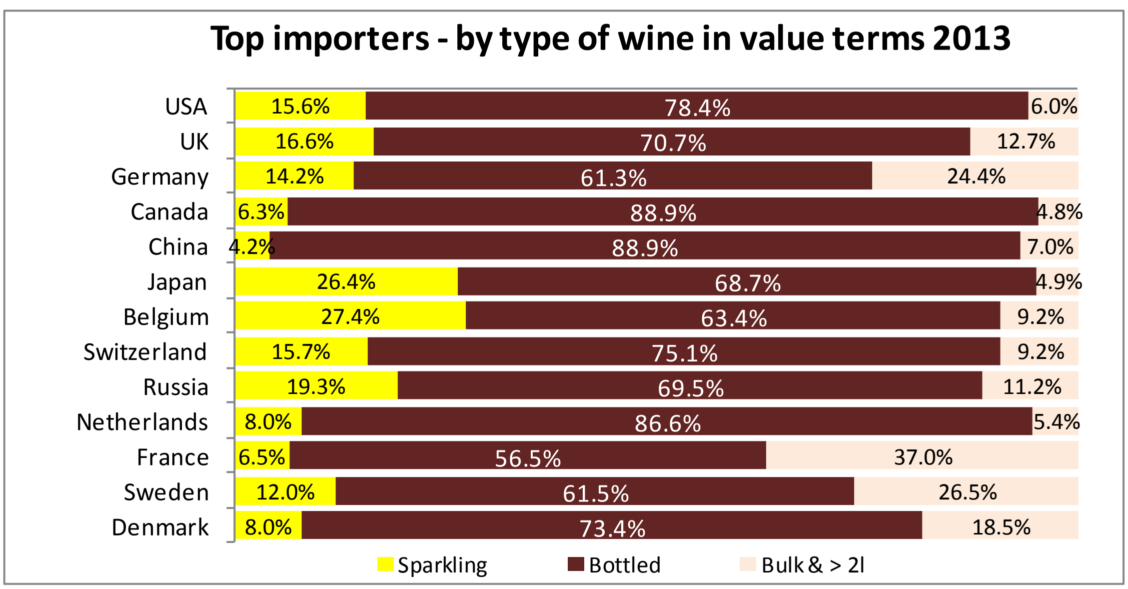
Looking at the chart with the evolution of each market, the biggest markets (UK, USA, Germany and Canada) decreased their imports of wine in 2013 in volume, with Canada (buying in dollars like the USA) also reducing their purchase in Euros. On the opposite side, four large European markets, including two Scandinavian (Denmark and Sweden) led the increase in both volume and value terms.

[5] Within the Group of 13 largest world wine importers Hong Kong ranks 8th in value terms, mainly due to imports from France and special imports coming from the UK; but ranks 19th in terms of volume. We substitute it by Sweden who ranks 14th in value although 11th in volume.

Top wine IMPORTERS - 2013
Source; Data form GTA /ellaborated by OeMv

Country	VALUE (€)	Chg 12-13	Country	VOLUME (liters)	Chg 12-13
USA	3 946.8	0.3%	Germany	1 500.2	-1.7%
UK	3 731.9	-5.2%	UK	1 303.2	-0.7%
Germany	2 514.5	3.8%	USA	1 096.6	-6.0%
Canadá	1 523.7	-1.1%	France	524.1	-11.0%
China	1 170.7	-4.8%	Russia	492.2	1.6%
Japan	1 155.8	-4.0%	China	376.6	-4.4%
Netherlands	881.7	-0.6%	Canadá	372.9	-1.0%
Swtizerland	949.2	2.9%	Netherlands	366.7	3.0%
Russia	911.8	11.9%	Belgium	314.0	0.2%
Belgium	975.8	1.5%	Japan	263.2	2.4%
Denmark	545.5	7.6%	Sweden	207.7	2.0%
France	648.3	3.6%	Denmark	201.7	7.0%
Sweden	590.4	7.9%	Switzerland	182.8	-2.9%
Others	5 698.5	4.1%	Others	2 217.2	4.0%
TOTAL IMPORT	**25 244.5**	**1.0%**	**TOTAL IMPOR**	**9 419.2**	**-0.7%**

Different evolution of different markets, which were differently affected by last years' scarcity of more expensive wines. Those more dependent on foreign bulk wines like France (37% of total imports) and Germany (24.4%) sharply decreased their imports in litres while increasing its cost, whereas those buying a larger proportion of sparkling wines benefited from a slight decrease in their average price.



5. The five largest wine markets 2013

Among the top world markets for wine, the first five in value account for more than half of total imports in Euros and 49% of total litres imported in 2013. The USA, UK, Germany, Canada and China reached a total amount of 12.9 billion Euros and 4.6 billion litres.

The **United States**, first world wine importer, bought 1,096 million litres of foreign wine last year for a total amount of 5.2 billion US Dollars at an average price of 4.78 USD per litre. Those amounts imply a substantial decrease in volume (-6%) of more expensive wine (+10.3%) which increased the bill by 3.7% in Dollars. The reduction in litres was concentrated in the purchase of wines in bulk and containers of more than 2 litres (-24%) which was not compensated by increases in sparkling and bottled wines (8.5% and 2.9% respectively in volume). Less quantities of cheap wine, probably due to the scarcity in Europe and a large crop in California the previous year, which provoked an increase in average prices, more related to the change of product mix than to the variation of prices for each category. The sharp reduction of bulk imports mostly affected Argentina, Spain and Chile, with Italy and France increasing their market share in volume and especially in value terms.

USA imports of wine - 2013

By Product	million USD	Chg 12-13	Million Litres	Chg 12-13	USD/l	Chg 12-13
Sparkling	822,1	5,6%	76,8	8,5%	10,70	-2,6%
Bottled	4.106,5	6,6%	719,0	2,9%	5,71	3,6%
Bulk & > 2l	314,5	-26,5%	300,7	-24,3%	1,05	-2,9%
TOTAL WINE	**5.243,1**	**3,7%**	**1.096,5**	**-6,0%**	**4,78**	**10,3%**
Key suppliers	**million USD**	**Chg 12-13**	**Million Litres**	**Chg 12-13**	**USD/l**	**Chg 12-13**
Italy	1.609,4	9,0%	290,7	1,5%	5,54	7,4%
France	1.436,6	4,5%	116,2	1,5%	12,36	3,0%
Australia	499,4	-6,5%	183,3	-10,5%	2,72	4,4%
Argentina	379,9	-5,9%	124,4	-28,0%	3,05	30,6%
Spain	340,5	6,8%	69,6	-14,8%	4,89	25,4%
Chile	323,7	-6,7%	147,9	-10,2%	2,19	3,9%

Imports in the **United Kingdom** decreased in 2013 both in litres and Sterling Pounds, although in this case led by fall in bottled wines. All categories increased their average prices in Pounds but the change in product mix, with a larger proportion of cheaper wines, forced the decline of the global average price of total imports by 0.2%. Wines introduced in Great Britain in bulk and containers of more than 2 litres gained 23 percentage points since the beginning of the century, from 12.4% of total imports in volume in year 2000 to 35.2% last year, and allow this country to also become a large exporter of wine to other markets. In 2013, all key suppliers but Chile reduced their sales to the UK in volume, with only Italy and Spain increasing their revenues in Pounds due to more expensive prices, and Chile also improving its sales in value despite lower average prices.

UK imports of wine - 2013						
By Product	**million STP**	**Chg 12-13**	**Million Litres**	**Chg 12-13**	**STP/l**	**Chg 12-13**
Sparkling	524,1	0,7%	83,6	-0,1%	6,27	0,8%
Bottled	2.241,2	-2,5%	760,3	-4,2%	2,95	1,7%
Bulk & > 2l	402,2	7,5%	459,1	5,6%	0,88	1,8%
TOTAL WINE	**3.167,5**	**-0,8%**	**1.303,0**	**-0,7%**	**2,43**	**-0,2%**
Key suppliers	**million STP**	**Chg 12-13**	**Million Litres**	**Chg 12-13**	**STP/l**	**Chg 12-13**
France	1.169,5	-8,1%	191,1	-4,9%	6,12	-3,4%
Italy	535,4	11,4%	250,5	-1,6%	2,14	13,2%
Australia	289,1	-5,5%	243,1	-2,8%	1,19	-2,8%
Spain	255,9	1,2%	121,6	-5,2%	2,10	6,8%
Chile	183,7	2,8%	112,0	10,0%	1,64	-6,6%
New Zealand	163,2	-7,3%	44,5	-19,0%	3,67	14,4%

Germany was in 2013 a clear example of how less availability of wines and higher prices for the cheapest ones affected different markets. Bulk wines at a 20% higher price reduced total imports by 2.5% in volume, although increasing the bill by 3.1% up to 2.5 billion Euros. From the point of view of the suppliers to the market, large increase of sales from Chile and South Africa (44.6% and 20.7% respectively) did not compensate reductions of wine coming from Italy, Spain and, to a lower extent, France.

GERMAN imports of wine - 2013						
By Product	**million Euros**	**Chg 12-13**	**Million Litres**	**Chg 12-13**	**€/l**	**Chg 12-13**
Sparkling	355,9	-8,3%	73,8	-1,7%	4,82	-6,7%
Bottled	1.529,9	1,7%	579,5	-0,9%	2,64	2,6%
Bulk & > 2l	610,7	15,4%	835,0	-3,6%	0,73	19,8%
TOTAL WINE	**2.496,5**	**3,1%**	**1.488,3**	**-2,5%**	**1,68**	**5,7%**
Key suppliers	**million Euros**	**Chg 12-13**	**Million Litres**	**Chg 12-13**	**€/l**	**Chg 12-13**
Italy	915,0	3,7%	574,2	-5,1%	1,59	9,4%
France	675,6	-0,4%	257,8	-0,7%	2,62	0,3%
Spain	404,5	8,8%	300,6	-7,3%	1,35	17,4%
South África	96,8	7,9%	95,2	20,7%	1,02	-10,6%
USA	91,9	6,5%	50,5	-0,4%	1,82	7,0%
Chile	74,7	13,9%	62,3	44,6%	1,20	-21,2%

Also in the case of **Canada** imports in 2013 were less in volume (-1%) although at higher prices (6.8%) which increase the total cost of foreign wines by 5.7% in Canadian Dollars. Particularly affected by these changes was Spain, whose exports to Canada in bulk were reduced by 46% and 11.3 million litres and could not be compensated by sales of other categories of wine. Such strong reduction in bulk wines, slightly compensated by larger purchases from South Africa and Chile, led the overall decrease of Canadian imports in volume. Purchase from other European producers like France and Italy also fell in litres but grew in Dollars, although at lower rates.

Imports of wine in CANADA - 2013

By Product	million CAD	Chg 12-13	Million Litres	Chg 12-13	CAD/l	Chg 12-13
Sparkling	132,5	6,3%	11,6	1,3%	11,42	4,9%
Bottled	1.854,6	6,1%	268,0	1,7%	6,92	4,3%
Bulk & > 2l	98,8	-2,1%	93,3	-8,5%	1,06	7,0%
TOTAL WINE	**2.085,9**	**-0,8%**	**372,9**	**-1,0%**	**5,59**	**6,8%**

Key suppliers	million CAD	Chg 12-13	Million Litres	Chg 12-13	CAD/l	Chg 12-13
France	468,8	7,1%	59,8	-2,8%	7,84	10,2%
USA	430,8	15,1%	59,8	6,7%	7,20	7,9%
Italy	415,4	5,3%	69,5	-3,6%	5,98	9,2%
Australia	225,2	-5,2%	51,9	4,9%	4,34	-9,7%
Spain	109,7	8,0%	28,2	-26,3%	3,89	46,6%
Argentina	102,6	-3,4%	24,8	-9,5%	4,14	6,7%

Finally, imports of wine by **China** – fifth larger world importer in euros – decreased in both volume and value, down to 377 million litres and 9.6 billion Chinese Renminbi. By category, such reduction was particularly led by lower purchase of wines in bulk (-26% in both volume and value) despite – in this case – a stable price (-0.3%). Actually, prices in Renminbi decreased more dramatically for bottled and sparkling wines (-6.5% and -24.7% respectively), causing different effects, with slight growth of imports for the former (4.8% in volume with a decrease in value) and a much stronger growth for the latter (38% in litres) although the amount of sparkling wine bought by China is still very small. Taking advantage of this situation was particularly Chile, with an increase of 37% in litres and 10% in CNY, and South Africa, who gain market share in spite of more scarce and expensive Spanish wine. Apart from pure market aspects, the evolution of Chinese wine imports was last year affected by legal debates regarding allegations against European wines on subsidies and potential dumping, finally solved.

Imports of wine by CHINA - 2013

By Product	million CNY	Chg 12-13	Million Litres	Chg 12-13	CNY/l	Chg 12-13
Sparkling	397,5	3,9%	8,7	38,0%	45,69	-24,7%
Bottled	8.502,5	-2,0%	278,9	4,8%	30,49	-6,5%
Bulk & > 2l	663,6	-26,9%	89,0	-26,7%	7,46	-0,3%
TOTAL WINE	**9.563,6**	**-4,1%**	**376,6**	**-4,4%**	**25,39**	**0,3%**

Key suppliers	million CNY	Chg 12-13	Million Litres	Chg 12-13	CNY/l	Chg 12-13
France	4.354,7	-12,3%	136,8	-2,1%	31,83	-10,5%
Australia	1.453,3	1,4%	41,2	-3,6%	35,27	5,2%
Chile	1.026,6	10,1%	83,6	37,1%	12,28	-19,7%
Spain	658,5	-6,9%	43,3	-39,4%	15,21	53,5%
Italy	547,5	6,6%	23,7	-27,1%	23,10	46,3%
USA	487,0	8,8%	15,8	-0,8%	30,82	9,7%