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Grapevine industry in the world: state of the art and future trends

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SUMMARY – The present status of the world's viticultural industry is illustrated by examining the trend of the surfaces, productions, consumption and imports of the grape-wine products in the last twenty years. The analysis of the data for each single country and the variations occurred in the same period confirm the liveliness of this sector and the important role of emerging producer countries in the world panorama.

Key words: grapevine, surface, production, import-export, wine

RESUME *- L'état de l'art de la viticulture mondiale est illustré en examinant les données relatives aux surfaces, aux productions, à la consommation et aux importations des produits viticoles et vinicoles des vingt dernières années. L'analyse de ces données pour chaque pays concerné et les variations enregistrées dans la même période confirment le dynamisme de ce secteur et le rôle fondamental des pays producteurs émergents dans le scénario mondial.*

Mots-clés*: vigne, surface, production, importation-exportation, vin*

Introduction

The grapevine is a fruit species of very ancient origins. From the Caucasian area, its cradle of origin, it spread first in the Mediterranean area and later across the world thanks to its marked adaptability to highly diversified soil and climatic conditions.

The species has characterised for centuries wide areas where it is used both for direct consumption (above all in the Asian and North African regions) and for wine processing. In the past, its presence, usually stable, was only rarely threatened by the major wars or by the sudden outbreak of natural enemies (phylloxera, downy mildew, powdery mildew).

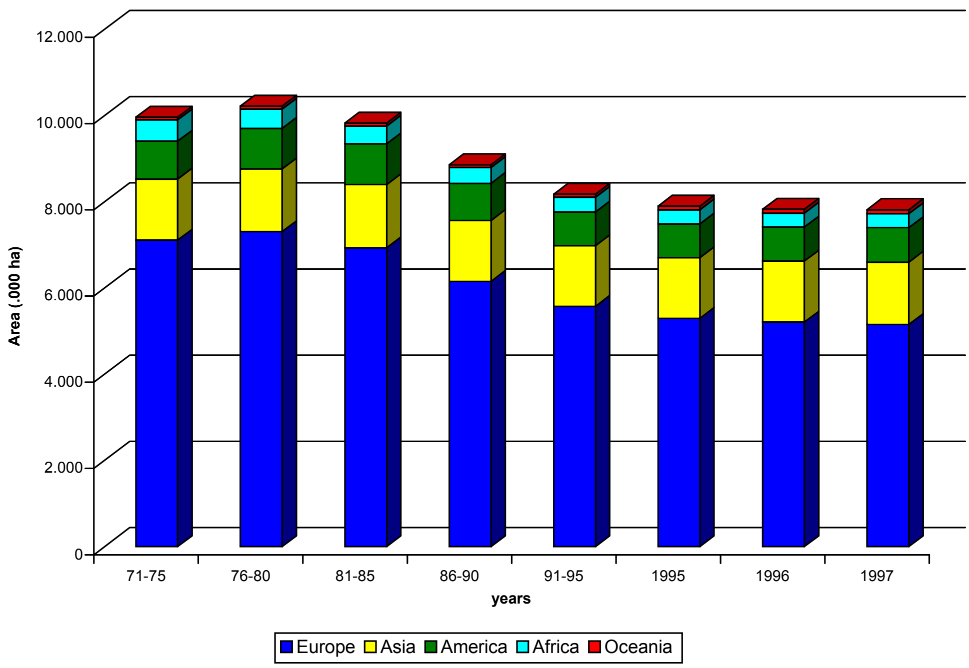
Recently, the steady reduction of wine consumption, for the competition of other drinks that are more appreciated especially by the young consumers, is affecting and shrinking this sector.

The crisis is affecting the traditional wine-producing countries although it has a bearing also on other regions. In this scenario, a countertrend is sometimes reported in some countries with increases in surface areas and productions.

This paper is designed to analyse the evolution of this sector over the last twenty years, to report the state of the art and to predict future scenarios.

The grapevine-growing surface in the world

According to OIV statistics, in 1997 the world vine-growing area equalled 7,814,000 hectares, with a reduction of 2.4 million hectares with respect to twenty years earlier (Tab. 1). The higher reductions occurred mainly in Europe, due to the EU incentives to pull out vineyards and to the crisis of this sector in the USSR; but it affected also all the other continents with the exception of Oceania (Fig. 1). In 1997, about 2/3 of the world vineyards were located in Europe, mainly in Spain (1,155,000 ha), France (914,000 ha) and Italy (914,000 ha), the three major vine-producing countries accounting for 38% of the world surface. The remaining areas were as follows: Asia (18.5%), America (10.2%), Africa (4.1%) and Oceania (1.3%) (Tab. 1).



Source: Office International de la Vigne et du Vin (OIV)

Fig. 1. Evolution of the vine-growing area in the world

Table 1. - Evolution of the vine-growing area in the world in the last twenty years (in ,000 ha)

	1976-80	%	1981-85	%	1991-95	%	1997	%
World	**10,213**	*100*	**9,823**	*100*	**8,175**	*100*	**7,814**	*100*
Europe	**7,304**	***71.5***	**6,930**	***70.5***	**5,573**	***68.2***	**5,149**	***65.9***
Italy	1,389	*13.6*	1,215	*12.4*	985	*12.0*	914	*11.7*
France	1,230	*12.0*	1,094	*11.1*	940	*11.5*	914	*11.7*
Spain	1,717	*16.8*	1,622	*16.5*	1,290	*15.8*	1,155	*14.8*
Portugal	364	*3.6*	369	*3.8*	271	*3.3*	260	*3.3*
Romania	301	*2.9*	302	*3.1*	251	*3.1*	254	*3.2*
Greece	192	*1.9*	192	*2.0*	138	*1.7*	132	*1.7*
Germany	101	*1.0*	101	*1.0*	106	*1.3*	105	*1.3*
U.R.S.S.	1,268	*12.4*	1,335	*13.6*				
Asia	**1,451**	***14.2***	**1,463**	***14.9***	**1,404**	***17.2***	**1,448**	***18.5***
Turkey	794	*7.8*	794	*8.1*	615	*7.5*	602	*7.7*
Iran	173	*1.7*	186	*1.9*	244	*3.0*	270	*3.5*
China	34	*0.3*	34	*0.3*	148	*1.8*	188	*2.4*
America	**944**	***9.2***	**946**	***9.6***	**781**	***9.6***	**799**	***10.2***
USA	303	*3.0*	337	*3.4*	304	*3.7*	315	*4.0*
Argentina	350	*3.4*	314	*3.2*	209	*2.6*	209	*2.7*
Chile	124	*1.2*	122	*1.2*	125	*1.5*	132	*1.7*
Brazil	62	*0.6*	61	*0.6*	60	*0.7*	57	*0.7*
Africa	**443**	***4.3***	**411**	***4.2***	**345**	***4.2***	**320**	***4.1***
South Africa	112	*1.1*	104	*1.1*	102	*1.2*	108	*1.4*
Algeria	211	*2.1*	190	*1.9*	99	*1.2*	70	*0.9*
Egypt	20	*0.2*	25	*0.2*	54	*0.7*	54	*0.7*
Morocco	50	*0.5*	47	*0.5*	50	*0.6*	49	*0.6*
Oceania	**71**	***0.7***	**73**	***0.7***	**72**	***0.9***	**98**	***1.3***
Australia	68	*0.7*	67	*0.7*	65	*0.8*	90	*1.2*

Source: Office International de la Vigne et du Vin (OIV)

Despite the surface reduction with respect to the five-year period 1976-1980, the relative percentage of Asia (+4.3%) and America (+1.0%) has increased, whereas Europe has recorded a 5.6% reduction.

The reduction of the vine-growing surface, that recorded an average rate of 135,000 ha/year for 15 years, slowed down in the years 1996-1997 (-69,000 ha in 1996 and -10,000 ha in 1997), thereby foreboding a phase of stabilisation. This equilibrium is only apparent since in the same two years some European and Mediterranean countries continued to pull out their vineyards (-142,000 ha in Europe, -15,000 ha in Algeria, -5,000 ha in Turkey) whereas others established new ones such as Australia (+18,000 ha), Iran (+18,000 ha), China (+24,000 ha), USA (+10,000 ha), Chile (+9,000 ha), Argentina (+9,000 ha), South Africa (+5,000 ha) and Peru (+4,000 ha).

Grapes production in the world

Grape production has recorded, although to a lesser extent, a considerable reduction over the last twenty years. If the overall surface area has dropped by about one fourth, the average grapes production has scored a 10% reduction ranging from 628 million quintals in the five-year period 1981-1985 (period of maximum production) to 563 million quintals in the years 1991-1995 (Tab. 2). Besides a favourable trend, this can be accounted for by production increases due to technological advances (more productive varieties, more effective fertilisers and pesticides, better production techniques, etc.) to setting aside wine-varieties, that are less productive than table grape-varieties, and to the establishment of new vineyards in more productive areas.

The slight increases recorded in the two year-period 1996-1997 with respect to the mean of the previous five years (Fig. 2) mark the interruption of the decreasing phase and the start up of a new period of stabilisation. Indeed, the productive reductions of the previous years had affected only Europe in that other continents continued to increase their productions.

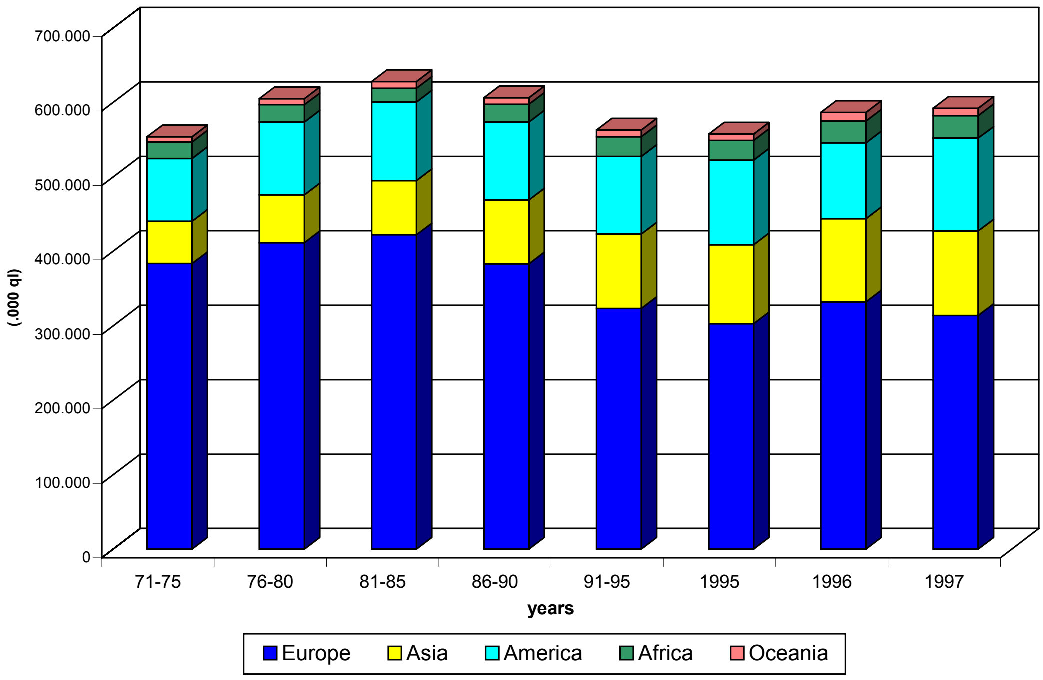
In 1997, Europe, with about 314 million quintals, contributed to 53% of the world grape production, far below its 68% share recorded at the end of the 70s. About half of the European production comes from Italy and France whose leadership at world level is now threatened by the US which has passed Spain in this ranking.

America and Asia hold important shares of the world grape production (21.1 % and 19.1% respectively) followed by Africa (5.1%) and Oceania (1.7%). Their greater production in terms of incidence with respect to the five-year period 1976-1980 (Asia +8.4%; America +5.0%; Africa +2.2%; Oceania +0.4%) shows a highly dynamic situation which is deemed to change the current world equilibrium, with a reduction of the European share compared to other continents.

Table 2. Evolution of grapevine production in the world *(in ,000 quintals)*

	1976-80	%	1981-85	%	1991-95	%	1997	%
World	**604,866**	***100***	**628,084**	***100***	**562,778**	***100***	**592,067**	***100***
Europe	**411,310**	***68.0***	**421,972**	***67.2***	**323,345**	***57.5***	**313,847**	***53.0***
Italy	115,458	*19.1*	112,200	*17.9*	95,236	*16.9*	81,518	*13.8*
France	91,855	*15.2*	79,192	*12.6*	68,557	*12.2*	71,909	*12.1*
Spain	53,334	*8.8*	59,503	*9.5*	44,031	*7.8*	55,032	*9.3*
Germany	10,417	*1.7*	12,234	*1.9*	15,188	*2.7*	12,500	*2.1*
Greece	15,581	*2.6*	16,371	*2.6*	12,529	*2.2*	12,132	*2.0*
Portugal	12,570	*2.1*	13,033	*2.1*	9,986	*1.8*	7,637	*1.3*
Asia	**64,498**	***10.7***	**72,719**	***11.6***	**99,759**	***17.7***	**113,356**	***19.1***
Turkey	34,060	*5.6*	37,410	*6.0*	35,500	*6.3*	37,000	*6.2*
Iran	8,978	*1.5*	8,978	*1.4*	17,413	*3.1*	21,247	*3.6*
China	1.740	*0.3*	3,000	*0.5*	13,319	*2.4*	20,330	*3.4*
America	**97,576**	***16.1***	**105,583**	***16.8***	**104,373**	***18.5***	**124,686**	***21.1***
USA	43,131	*7.1*	51,293	*8.2*	52,412	*9.3*	66,064	*11.2*
Argentina	32,335	*5.3*	29,750	*4.7*	23,004	*4.1*	24,819	*4.2*
Chile	7,780	*1.3*	7,161	*1.1*	13,205	*2.3*	16,692	*2.8*
Brazil	6,541	*1.1*	8,172	*1.3*	7,668	*1.4*	8,556	*1.4*
Africa	**23,442**	***3.9***	**18,725**	***3.0***	**26,112**	***4.6***	**30,157**	***5.1***
South Africa	8,967	*1.5*	10,913	*1.7*	13,358	*2.4*	14,623	*2.5*
Egypt	2,480	*0.4*	3,435	*0.5*	6,715	*1.2*	8,679	*1.5*
Morocco	1,960	*0.3*	1,695	*0.3*	2,391	*0.4*	3,136	*0.5*
Algeria	4,699	*0.8*	1,346	*0.2*	2,139	*0.4*	1,922	*0.3*
Oceania	**8,040**	***1.3***	**9,085**	***1.4***	**9,189**	***1.6***	**10,021**	***1.7***
Australia	7,490	*1.2*	8,254	*1.3*	8,636	*1.5*	9,421	*1.6*

Source: Office International de la Vigne et du Vin (OIV)



Source: Office International de la Vigne et du Vin (OIV)

Fig. 2. Evolution of grapes production in the world

Grape destination

On the ground of OIV estimates, the major grape destination is for wine making. In 1997, about 264.4 million hectolitres of wine were produced which correspond to about 378 million quintals of grapes (64% of the total) assuming a 70% yield. The share for fresh consumption is slightly above 20% (124,584 q) and that for raisins is even lower (10,921 q which correspond to around 40,000 q of fresh product) (Tab. 3). The shares for other destinations, like processing for grape juice, are even lower (about 5,000 hl in the US and 1,000 hl in Spain and Germany, the major consumers of this juice).

Although the official estimates do not report 50,000,000 q grapes, probably processed into wine without notification (estimates from Asian countries are rough), no doubt that the bearing of the wine share on the overall sector is considerable.

Table 3. Grapes destination in the various continents *(in ,000 quintals)*

		86-90	91-95	1995	1996	1997	%
World	*(total)*	**606,126**	**562,778**	**557,360**	**586,450**	**592,067**	*100.0*
	Table grapes	126,143	110,965	116,994	122,928	124,584	*21.0*
	Raisins	10,205	10,270	9,972	10,143	10,921	*1.8*
Europe	*(total)*	**382,825**	**323,345**	**302,623**	**331,927**	**313,847**	*100.0*
	Table grapes	58,290	39,321	38,323	39,962	37,538	*12.0*
	Raisins	1,304	863	844	976	936	*0.3*
Asia	*(total)*	**86,119**	**99,759**	**105,799**	**111,744**	**113,356**	*100.0*
	Table grapes	48,313	45,684	50,008	54,420	55,523	*49.0*
	Raisins	4,318	4,803	5,071	5,136	5,103	*4.5*
America	*(total)*	**104,415**	**104,373**	**113,816**	**101,876**	**124,686**	*100.0*
	Table grapes	14,329	19,120	22,329	21,722	23,508	*18.9*
	Raisins	3,617	3,825	3,290	3,166	4,175	*3.3*
Africa	*(total)*	**23,924**	**26,112**	**26,689**	**29,282**	**30,157**	*100.0*
	Table grapes	4,788	6,366	5,889	6,266	7,399	*24.5*
	Raisins	358	368	440	319	412	*1.4*
Oceania	*(total)*	**8,843**	**9,189**	**8,433**	**11,621**	**10,021**	*100,0*
	Table grapes	423	474	445	558	616	*6,1*
	Raisins	608	412	327	546	295	*2,9*

Source: Elaboration of data of the Office International de la Vigne et du Vin (OIV)

Production and consumption of wine in the world

The global wine volume ranged from a yearly mean of 326.6 million hl in the period 1976-1980 to 251.5 million hl in 1991-1995, with a peak of 332.5 million hl in 1981-1985 and a steady decrease throughout 1995 (Fig. 3). In the years 1996 and 1997, a slight production increase was reported as a sign of a new stabilisation.

Once again in the period 1991-1995, the European producers reduced their wine/year production by about 63.5 million hl with respect to ten years earlier (1981-1985, period of maximum production); the same was true for America (-9.6 million hl) and Africa (-1.2 million hl). On the other hand, the trend of wine production in the other continents was opposite (+1.3 million hl in Asia and +0.7 million hl in Oceania) (Tab. 4).

Table 4. Evolution of wine production and consumption in the world over the last twenty years *(in ,000 hl)*

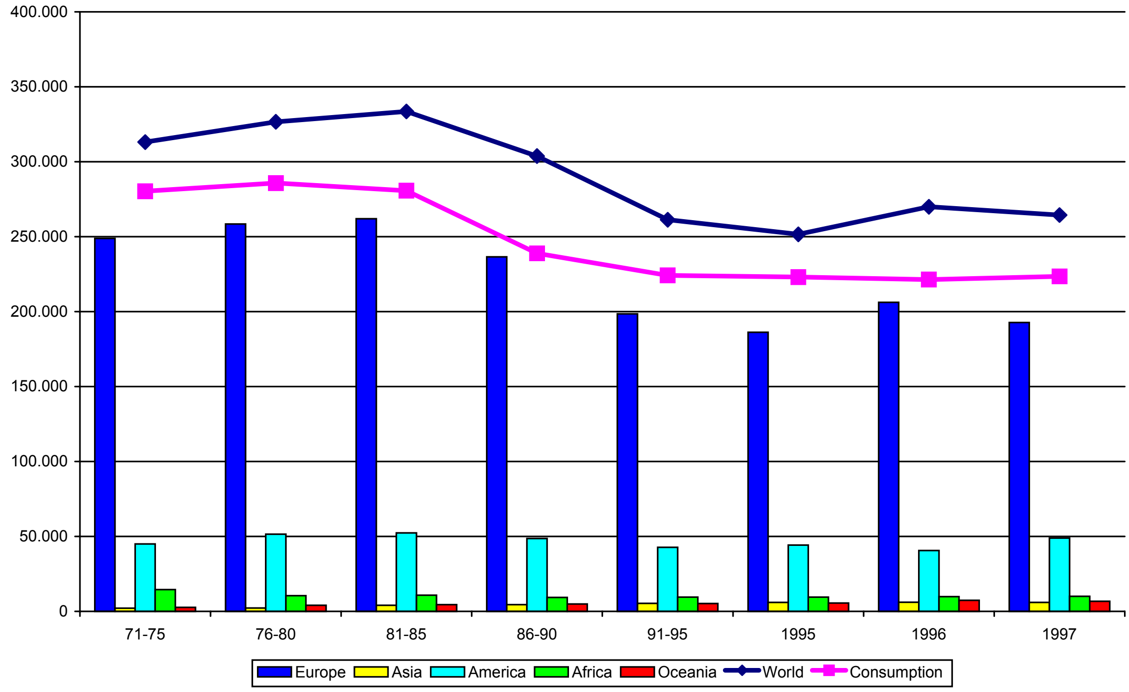
	76-80	81-85	86-90	91-95	1995	1996	1997
World							
Production	**326,646**	**333,552**	**303,793**	**261,279**	**251,576**	**269,970**	**264,422**
Consumption	*285,746*	*280,718*	*238,902*	*224,205*	*223,021*	*221,444*	*223,533*
Europe							
Production	**258,463**	**261,946**	**236,525**	**198,491**	**186,280**	**206,231**	**192,735**
Consumption	*227,452*	*216,925*	*177,024*	*166,286*	*164,210*	*162,787*	*163,346*
Asia							
Production	**2,251**	**3,997**	**4,484**	**5,301**	**5,947**	**6,123**	**6,006**
Consumption	*890*	*1,471*	*4,565*	*5,592*	*6,486*	*6,836*	*7,405*
America							
Production	**51,478**	**52,334**	**48,593**	**42,736**	**44,243**	**40,534**	**48,903**
Consumption	*49,547*	*52,752*	*48,358*	*43,266*	*42,846*	*42,269*	*43,071*
Africa							
Production	**10,436**	**10,750**	**9,264**	**9,498**	**9,514**	**9,775**	**10,054**
Consumption	*5,388*	*5,950*	*5,125*	*5,407*	*5,808*	*5,815*	*5,766*
Oceania							
Production	**4,018**	**4,525**	**4,927**	**5,253**	**5,592**	**7,307**	**6,724**
Consumption	*2,469*	*3,378*	*3,830*	*3,654*	*3,671*	*3,737*	*3,945*

Source: Office International de la Vigne et du Vin (OIV)

In 1997, Europe continued to hold the record of production (72.9%), preceding America (18.5%), Africa (3.8%), Oceania (2.5%) and Asia (2.3%) (Tab. 4). Over 50% of the world production is still concentrated in the triangle of France (53,612,000 hl), Italy (50,847,000 hl) and Spain (33,887,000 hl) which are the most important producers in the world threatened by the USA (25,000,000 hl).

This drop was induced by the progressive reduction of wine consumption that started in the 70s mainly in the countries with an older tradition (Fig. 3). The average consumption in the five-year period 1991-1995 dropped by 61.5 million hl with respect to 1976-1980 bringing up problems of surplus which affected the world market and spurred the EU to take steps to limit productions (compensation for pulling out vineyards, distillations, etc.).

In the five-year period 1991-1995 compared to 1976-1980, the sharpest consumption reductions occurred in Europe (-58.2 million hl) and in America (-6.3 million hl) whereas slight and promising consumption increases took place in Asia (+4.7 million hl with a 530% rise) and in Oceania (+1.2 million hl) (Tab. 4).



Source: Office International de la Vigne et du Vin (OIV)

Fig. 3. Evolution of wine production and consumption in the world (the histogram represents the wine production in the various continents)

Over the last years the bearish trend of consumption seems to be over with some encouraging signs of recovery (Tab. 4).

The gap among continents is still wide. The Europeans (73% of the overall wine consumption) drink 63.4 litres of wine/year in Luxembourg, 60 in France, 58.8 in Italy, 56.4 in Portugal, 41.2 in Switzerland, 38 in Spain, whereas, with a very few exceptions reported in South America (Argentina with 41 l/year; Uruguay with 31), per capita consumption is lower in the non-EU countries and rarely exceed 10 l/year.

Table-grape production

Unlike wine grapes, table-grapes productions kept stable levels with a slight increase over the last years (Tab. 3). According to OIV estimates, which are based on indirect calculations since it is difficult to define this product, the 1997 production equalled 124,584,000 q, 1.6 million q more than that of 1996, which was in turn 6.0 million q higher than the 1995 production.

About 44.5% of the overall production is concentrated in Asia, the continent which has recorded the highest levels of growth in the last years (+5.5 million quintals from 1995 to 1997). The remaining shares come from Europe (30%), America (19%), Africa (6%) and Oceania (0.5%) (OIV source, 1997).

The production record is held by Iran (15,506,000 q) followed by Italy (15,300,000 q), China (14,102,000 q), Turkey (12,757,000 q), Chile (8,647,000 q) and USA (8,523,000 q) (OIV source, 1997).

By comparing the average productions of the period 1986-1990, a striking growth is reported in 1997 from China (+311%), South Africa (+128%), Chile (+85%), Brazil (+70%), Afghanistan (+67%), Morocco (+55%), USA (+53%), Australia (+46%) and Iran (+38%) just to quote the major producers. Conversely, in the same period, Europe reported a major fall mainly in the former USSR states (-67%), Spain (-33%), France (-36%), Greece (-20%), Romania (-25%) and Bulgaria (-30%) and, out of Europe, also in Algeria (-34%) and Syria (-26%). The production of raisins is still constant (around 10 million q/year) and is concentrated in smaller areas. The major producers are the USA (3,752,000 q) which bypassed Turkey (3,600,000 q) in 1997, followed by Iran (900,000 q), Greece (860,000 q), South Africa (390,000 q), Australia (295,000 q), Chile (285,000 q) and Afghanistan (281,000 q).

Wine imports/exports

The market globalisation and the need for selling productive surplus compell countries to search for new buyers abroad. The volume of wine exported in 1997 was 64.2 million hl, equal to 24.3% of the overall production, higher than the 14.9% share exported in the years 1981-1985 (Tab. 5).

In 1997, about 85% of the exported wine came from Europe. It shall be underscored that just a few years earlier the Europeans were the sole exporters in the world (95.4% in 1981-1985). At present, apart from traditional producers, i.e. France and Italy with more than 15 million hl respectively, and a few European countries such as Spain (9,095,000 hl), Portugal (2,450,000 hl), Germany (2,099,000 hl), Moldavia (1,997,000 hl) and Bulgaria (1,805,000 hl), the export market is characterised by countries like the USA (2,221,000 hl), Chile (2,163,000 hl), Australia (1,706,000 hl), Argentina (1,205,000 hl) and South Africa (1,086,000 hl). The market shares of these countries have risen enormously over the last years and do not show signs of stopping (Tab. 5).

The Europeans are also the major wine importers (78.5% in 1997), followed by the Americans (13.5%). Imports in the other continents are still insignificant (with the sole exception of Japan with about 1,300,000 hl). Amongst importing countries, for the year 1997, mention should be made of Germany, United Kingdom, France, USA, Russia, Canada, Switzerland, Belgium, Denmark and the Netherlands (OIV source, 1997).

Table 5. Volume of wine exports in the world *(in ,000 hl)*

	1981-85	1986-90	1991-95	1996	1997
World	**49,446** ***100%***	**44,238** ***100%***	**51,081** ***100%***	**57,803** ***100%***	**64,240** ***100%***
Europe	**47,168** ***95.4%***	**41,662** ***94.2%***	**45,719** ***89.5%***	**49,329** ***85.3%***	**54,505** ***84.8%***
Italy	17,319	12,551	15,069	15,115	15,374
France	10,164	12,776	11,478	12,990	15,434
Spain	5,901	4,654	6,908	6,729	9,095
Hungary	2,910	2,035	897	1,517	1,006
Bulgaria	2,428	1,794	1,162	1,805	1,805
Germany	2,604	2,746	2,715	2,360	2,099
Portugal	1,399	1,592	1,982	2,000	2,450
Moldavia			1,370	1,600	1,997
Asia	**446** ***0.9%***	**368** ***0.8%***	**558** ***1.1%***	**630** ***1.1%***	**796** ***1.2%***
Cyprus	382	282	439	454	355
America	**709** ***1.4%***	**1,083** ***2.4%***	**2,949** ***5.8%***	**4,910** ***8.5%***	**5,809** ***9.0%***
USA	301	623	1,335	1,759	2,221
Argentina	182	221	591	1,120	1,205
Chile	131	183	868	1,841	2,163
Africa	**1,036** ***2.2%***	**740** ***1.8%***	**618** ***1.4%***	**1,347** ***2.7%***	**1,293** ***2.4%***
South Africa	68	46	371	996	1,086
Algeria	305	480	72	195	78
Oceania	**87** ***0.2%***	**385** ***0.9%***	**1,236** ***2.7%***	**1,587** ***3.2%***	**1,837** ***3.4%***
Australia	84	362	1,161	1,477	1,706

Source: Office International de la Vigne et du Vin (OIV)

Table grapes imports/exports

The volume of exported produce in 1997 was 18,937,000 q, equal to 15.2% of the total amount. 45.5% of this amount was exported by American countries which bypassed Europe (40.6%) whose market share is steadily decreasing (Tab. 6).

Table 6. Volume of the table-grapes exports in the world *(in ,000 q)*

	1986-90	1991-95	1996	1997
World	**14,728** ***100%***	**17,482** ***100%***	**19,122** ***100%***	**18,937** ***100%***
Europe	**7,556** ***51.3%***	**8,598** ***49.2%***	**7,845** ***41.0%***	**7,691** ***40.6%***
Italy	4,370	5,136	4,295	4,185
Spain	940	1,098	968	1,003
Greece	818	998	1,021	1,026
Netherlands	272	559	828	732
Asia	**785** ***5.3%***	**953** ***5.5%***	**1,240** ***6.5%***	**1,120** ***5.9%***
Turkey	169	205	284	334
America	**5,785** ***39.3%***	**6,989** ***40.0%***	**8,718** ***45.6%***	**8,681** ***45.8%***
USA	3,286	2,045	2,150	2,688
Chile	2,435	4,286	5,700	5,191
Africa	**470** ***3.2%***	**818** ***4.7%***	**1,107** ***5.8%***	**1,180** ***6.2%***
South Africa	469	805	1,093	1,170
Oceania	**132** ***1.7%***	**124** ***1.4%***	**212** ***2.7%***	**265** ***3.4%***
Australia	132	124	212	265

Source: Office International de la Vigne et du Vin (OIV)

Chile is the major table grape exporter with 5,191,000 q and has bypassed Italy (4,185,000 q). It is followed by the USA (2,688,000 q) and South Africa, Greece and Spain with about 1 million q.

It may be highlighted that some countries export a great part of their production abroad. Among them, mention should be made of Chile (60%), South Africa (65.8%), Australia (43%), Greece (47.3%), Spain (32.3%) and Italy (27.3%) (OIV source, 1997).

Among importing countries are the USA and Germany (about 3.6 million q each) followed by France, Canada, United Kingdom, the Netherlands, Hong Kong with more than 1 million q (OIV source, 1997).

As to raisins, the major exporters are Turkey (1,809,000 q), the USA (1,178,000 q) and Greece (597,000 q) (Tab. 7).

Table 7. Volume of raisins exports in the world *(in ,000 q)*

	1986-90	1991-95	1996	1997
World	**5,114** ***100%***	**5,470** ***100%***	**5,414** ***100%***	**5,326** ***100%***
Europe	**1,224** ***23.9%***	**894** ***16.3%***	**837** ***15.5%***	**875** ***16.4%***
Greece	1,020	998	1,021	1,026
Asia	**2,116** ***41.4%***	**2,404** ***43.9%***	**2,596** ***47.9%***	**2,435** ***45.7%***
Turkey	1,152	1,374	1,719	1,809
Afghanistan	577	248	200	200
Iran	256	591	470	250
America	**1,055** ***20.6%***	**1,557** ***28.5%***	**1,509** ***27.9%***	**1,566** ***29.4%***
USA	811	1,252	1,186	1,178
Chile	122	196	132	240
Africa	**206** ***4.0%***	**227** ***4.1%***	**250** ***4.6%***	**280** ***5.3%***
South Africa	206	227	250	280
Oceania	**513** ***10.0%***	**388** ***7.1%***	**222** ***4.1%***	**170** ***3.2%***
Australia	513	388	222	170

Source: Office International de la Vigne et du Vin (OIV)

Conclusions

The crisis that affected the sector of viticulture has profoundly changed the world scenario of this sector. The resulting strong reduction of the vine-growing area (over 2 million hectares) has yielded only partial results since grape production has not dropped to the same extent and the production surplus is still a burden for markets. The interruption of the fall in vine-growing areas and production hides an apparent stability since some countries, above all in Europe and in the Mediterranean area, continue to pull out vineyards to outweigh the growth in other continents.

The prospects for the near future are still uncertain. The discontinuance of EU grants to pull out vineyards, that has led to the reduction of the vine-growing area over the last years, might reverse the productive trend with new problems of overproduction, should consumption not increase.

As far as wine is concerned, since no rise may be expected from traditional countries, an increase in the number of consuming countries is desirable together with the consolidation of wine consumption in the countries which have recently discovered this new drink. The market globalisation offers new potential as witnessed by the higher wine shares exchanged in the international market. Furthermore, a more favourable attitude of consumers towards this beverage is now known; it is less demonised than in the past and has been officially recognised for its beneficial effects on health (in case of moderate use). Encouraging signs come from Asian markets (Japan, China, Hong Kong, Taiwan) and by the new producing countries (South Africa, Australia).

It is clear-cut that a fiercer competition will stem from the new producers which are well organized at commercial level. For those countries which produce at higher costs due to the high cost of labour force, competition will be played on the ground of quality rather than of quantity.

The sector of table viticulture has withstood the most crucial period; it is now showing clear-cut signs of recovery as proved by the high volumes of exports.

Also in this sector, new countries are showing a great interest and the suppression of factors which limited the exports (improvement of storage and transport techniques) can but favour the broadening of markets.

Further efforts are being made to gain the consumers' consensus by diversifying the supply (with new seedless varieties), extending the supply timing (with very early and very late varieties, with covering techniques to anticipate and delay production, with new storage practices) and upgrading the quality of products.

On the contrary, the consumption of grapes-based products (raisins, grape juice, products for confectionery, etc,) is rather limited and therefore it needs greater investments.