

# Rural Migration News

## Blog 311

DECEMBER 2022

### World Wine in 2020

World wine consumption was 236 million hectoliters in 2021, down from the 260 million hectoliters consumed in 2019. One hectoliter is 26.4 gallons, making global wine consumption about 6.2 billion gallons or 1.1 gallons per year for each of the 5.5 billion people 18 and older.

The US consumed the most wine, 33 million hectoliters. EU countries consumed 114 million hectoliters, half of global wine consumption but down sharply from the EU's 60 percent share of global wine consumption in 2000. France consumed 25 million hectoliters of wine, Italy 24 million, and Germany 20 million. The UK consumed 13 million hectoliters of wine, and the top five consuming countries accounted for almost half of the world's wine consumption.

Other major European wine consumers include Russia, 10 million hectoliters consumed in 2021, Spain, 10 million, Portugal, five million, and Romania and the Netherlands, four million each. China consumed 10 million hectoliters of

wine and Japan three million. In the southern hemisphere, Argentina consumed eight million hectoliters, Australia, six million, and Brazil and South Africa, four million hectoliters each.

#### Production

World wine production was 260 million hectoliters or 6.9 billion gallons in 2021 from about 7.3 million hectares of vineyard; production was 10 percent more than consumption.

Spain has almost a million hectares of vineyard, the most of any country, followed by France, 800,000 hect-

ares, and Italy, 700,000 hectares. China and Turkey have large vineyard areas, but many of their grapes are devoted to table grapes and raisins.

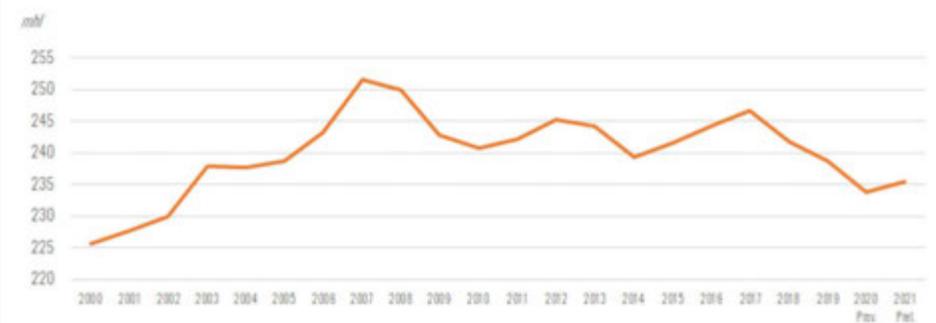
About 70 percent of the world's wine is produced in Europe, including 154 million hectoliters or 54 percent in the EU. Italy produced 50 million hectoliters of wine in 2021, France, 38 million, and Spain, 35 million; these three countries accounted for almost half of global wine production. Germany produced almost eight million hectoliters and Portugal seven million. Production in 2022 was similar: Italy produced 50 million hectoliters, France 44 million, Spain 33 million, Germany nine million, and Portugal, seven million.

Italy has been the leading wine producer since 2017, France's wine production has been variable, while Spanish wine production is declining.

Major new world wine producers include the US, which produced 23 million hectoliters of wine in 2022. The leading southern hemisphere wine producers are Chile, which produced 12 million hectoliters in 2022, Australia, 12 million, Argentina, 11 million, and South Africa, 10 million.

#### World Wine Consumption is 1.1 Gallon or 5 Bottles a Year for Each Person 18 and Older

Figure 5: Evolution of World Wine Consumption



## Trade

Some 112 million hectoliters of wine worth E34 billion (\$36 billion), over 40 percent of global production, is traded over borders. Spain was the largest exporter of wine by volume, exporting 23 million hectoliters or a fifth of global wine exports, and France was the leading exporter by value, exporting E11 billion worth of wine or 30 percent of the global total.

Italy was the second leading exporter by volume, exporting 22 million hectoliters in 2021, while France exported 15 million hectoliters. Chile exported nine million hectoliters of wine in 2021, Australia six million, South Africa five million, and New Zealand three million; the US also exported three million hectoliters in 2021.

The southern hemisphere wine export champions are Australia, Chile, South Africa, and NZ. They collectively have one percent of the world's people, produce 15 percent of the world's wine, and account for 20 percent of global wine exports.

Australia was the sixth largest producer and fifth largest exporter of wine in 2021, just behind Chile. Over 60 percent of Australian-produced wine is exported, and over half of Australia's wine exports went to China in 2019. In 2018, Australia banned China's Huawei from its 5G network, and in 2020 then PM Scott Morrison called for independent inquiry into the origins of covid. China reacted by imposing tariffs on Australian farm exports including wine, reducing Australian wine exports to China by 95 percent in 2021.

Higher priced wines that cross borders are often bottled and shipped in cases; a 20-foot shipping container holds 800 cases on 10 pallets. A case of wine is nine liters,

## The U.S. Consumes 14% and the EU 50% of the World's Wine

<i>mhl</i>	2017	2018	2019	2020	2021	21/20	2021
				Prov.	Prel.	% Var.	% world
USA	32.7	33.6	34.2	32.9	33.1	0.7%	14%
France	28.6	26.0	24.7	23.2	25.2	8.6%	11%
Italy	22.6	22.4	22.6	24.2	24.2	0.0%	10%
Germany	19.7	20.0	19.8	19.8	19.8	-0.2%	8%
UK	13.1	12.9	13.0	13.4	13.4	0.0%	6%
Spain	10.5	10.9	10.7	9.6	10.5	9.9%	4%
China	19.3	17.6	15.0	12.4	10.5	-15.4%	4%
Russia	10.4	9.9	10.0	10.3	10.5	2.0%	4%
Argentina	8.9	8.4	8.5	9.4	8.4	-11.1%	4%
Australia	5.4	5.3	5.9	5.9	5.9	0.3%	3%
Portugal	5.2	5.1	5.4	4.6	4.6	-0.6%	2%
Canada	5.0	4.9	4.7	4.4	4.2	-4.5%	2%
Brazil	3.3	3.3	3.3	4.1	4.1	1.2%	2%
Romania	4.1	3.9	3.9	3.8	4.0	4.6%	2%
South Africa	4.4	4.2	3.9	3.1	4.0	27.5%	2%
Netherlands	3.7	3.6	3.5	3.6	3.8	3.4%	2%
Japan	3.5	3.5	3.5	3.5	3.3	-5.4%	1%
Switzerland	2.5	2.5	2.7	2.6	2.6	-1.0%	1%
Belgium	2.8	2.7	2.7	2.6	2.5	-4.1%	1%
Austria	2.4	2.4	2.3	2.3	2.4	2.3%	1%
Czech Republic	2.1	2.0	2.2	2.1	2.3	11.9%	1%
Greece	2.4	2.2	2.2	2.2	2.2	-0.4%	1%
Sweden	2.3	2.1	2.0	2.1	2.1	-0.3%	1%
Other countries	31.7	32.5	32.0	31.6	32.0	1.3%	14%
<b>World total</b>	<b>247</b>	<b>242</b>	<b>239</b>	<b>234</b>	<b>236</b>	<b>0.7%</b>	<b>100%</b>

so one container has 7,200 liters of bottled wine. A third of the wine that crosses national borders is bulk wine, which is usually transported in bladders that fit inside 20-foot containers and hold 24,000 liters; the wine is sometimes blended at the destination before bottling. Over half of the wine exported from Australia and Spain is shipped in bulk containers.

Germany, the US, and the UK each imported 14 million hectoliters of wine in 2021. Over half of German wine imports arrived in bulk, compared with a third of US and UK wine imports. France imported six million hectoliters, including three-

fourths bulk, followed by the Netherlands, five million hectoliters.

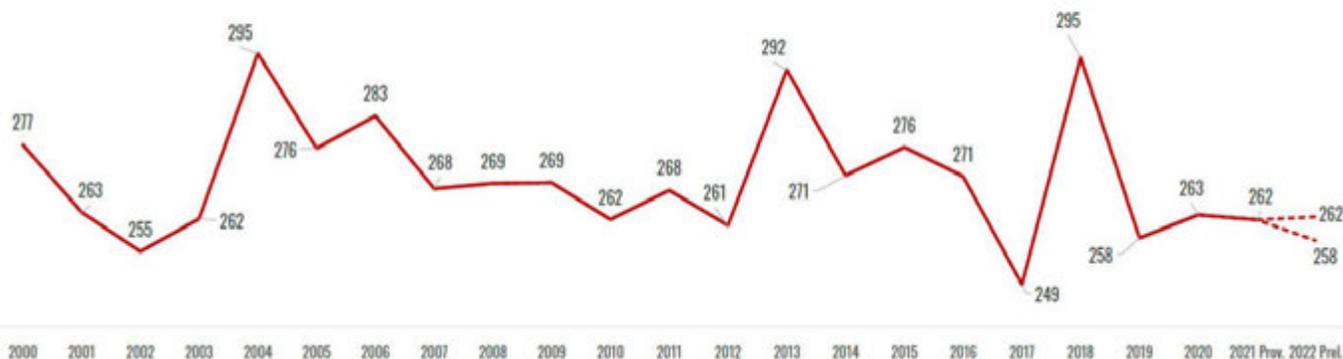
## Sparkling

Sparkling wines release bubbles when uncorked as CO<sub>2</sub> is released. The production of sparkling wine has been increasing, topping 20 million hectoliters in 2018, almost double the 2000 production levels.

Italy produces five million hectoliters or a quarter of the world's sparkling wines, mostly Prosecco, which uses the Charmat process that adds yeast and sugar in a closed tank to create CO<sub>2</sub>. France produced four million hectoliters or 22 percent,

World Wine Production is 260 Million Hectoliters or 6.2 Billion Gallons a Year

Figure 1 - World wine production volume (excluding juices and musts), 2000-2022



Spain has 1/7 of the World's 7.3 Million Hectares of Vineyard

<i>kha</i>	2017	2018	2019	2020	2021	21/20	2021
				Prov.	Prel.	% Var.	% world
Spain	968	972	966	961	964	0.4%	13.2%
France	788	792	794	796	798	0.2%	10.9%
China	760	779	781	783	783	0.0%	10.7%
Italy	699	705	714	719	718	0.0%	9.8%
Turkey	448	448	436	431	419	-2.7%	5.7%
USA	434	408	407	400	400	0.0%	5.5%
Argentina	222	218	215	215	211	-1.7%	2.9%
Chile	207	208	210	207	210	1.0%	2.9%
Portugal	194	192	195	195	194	-0.2%	2.7%
Romania	191	191	191	190	189	-0.7%	2.6%
Iran	153	167	167	170	170	0.0%	2.3%
India	147	149	151	151	151	0.0%	2.1%
Australia	145	146	146	146	146	0.0%	2.0%
Moldova	151	147	143	140	138	-1.4%	1.9%
South Africa	130	130	129	128	126	-2.0%	1.7%
Uzbekistan	111	108	112	112	112	0.0%	1.5%
Greece	106	108	109	109	109	0.0%	1.5%
Germany	103	103	103	103	103	0.2%	1.4%
Afghanistan	94	94	96	100	100	0.0%	1.4%
Russia	91	94	96	97	98	0.8%	1.3%
Brazil	84	82	81	80	81	0.2%	1.1%
Egypt	84	80	78	77	77	0.0%	1.1%
Algeria	75	75	74	75	75	0.0%	1.0%
Bulgaria	65	67	67	66	66	0.0%	0.9%
Hungary	68	69	68	65	64	-1.2%	0.9%
Other countries	811	809	826	831	826	-0.5%	11.3%
<b>World total</b>	<b>7329</b>	<b>7341</b>	<b>7357</b>	<b>7347</b>	<b>7328</b>	<b>-0.3%</b>	<b>100.0%</b>

### France, Italy, and Spain Produce Almost Half of the World's Wine

<i>Unit: mhl</i>	2017	2018	2019	2020	Prov. 2021	Prel. 2022	22/21 Var.	22/21 %Var.	5-year Average
Italy	42.5	54.8	47.5	49.1	50.2	50.3	0.1	0%	48.8
France	36.4	49.2	42.2	46.7	37.6	44.2	6.6	17%	42.4
Spain	32.5	44.9	33.7	40.9	35.0	33.0	-2.0	-6%	37.4
Germany	7.5	10.3	8.2	8.4	8.7	8.9	0.1	2%	8.6
Portugal	6.7	6.1	6.5	6.4	7.3	6.7	-0.6	-8%	6.6
Romania	4.3	5.1	3.8	3.8	4.5	4.6	0.2	4%	4.3
Hungary	2.9	3.6	2.7	2.9	2.6	2.5	-0.1	-3%	2.9
Austria	2.5	2.8	2.5	2.4	2.5	2.3	-0.1	-6%	2.5
Greece	2.6	2.2	2.4	2.3	2.4	1.7	-0.7	-29%	2.4
Bulgaria	1.2	1.1	0.9	0.8	0.8	0.9	0.0	5%	1.0
Slovenia	0.6	0.9	0.8	0.7	0.6	0.7	0.1	15%	0.7
Croatia	0.7	1.0	0.7	0.8	0.5	0.6	0.1	12%	0.7
Czech Rep.	0.6	0.7	0.5	0.6	0.6	0.6	-0.1	-8%	0.6
Slovakia.	0.3	0.4	0.3	0.4	0.3	0.3	0.0	-7%	0.3
Luxembourg	0.1	0.1	0.1	0.1	0.1	0.1	0.0	-13%	0.1
Cyprus	0.1	0.1	0.1	0.1	0.1	0.1	0.0	20%	0.1
Malta	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21%	0.0
<b>EU27</b>	<b>141</b>	<b>183</b>	<b>153</b>	<b>166</b>	<b>154</b>	<b>157</b>	<b>3.5</b>	<b>2%</b>	<b>159.6</b>

### Chile, Australia, Argentina, SA, and NZ are the Major Southern Hemisphere Wine Producers

<i>Unit: mhl</i>	2017	2018	2019	2020	Prov. 2021	Prel. 2022	22/21 Var.	22/21 % Var.	5-year Average
Chile	9.5	12.9	11.9	10.3	13.4	12.4	-1.0	-7%	11.6
Australia	13.7	12.7	12.0	10.9	14.8	12.1	-2.7	-18%	12.8
Argentina	11.8	14.5	13.0	10.8	12.5	11.4	-1.1	-9%	12.5
South Africa	10.8	9.5	9.7	10.4	10.6	10.2	-0.4	-4%	10.2
New-Zealand	2.9	3.0	3.0	3.3	2.7	3.8	1.2	44%	3.0
Brazil	3.6	3.1	2.2	2.3	3.6	3.2	-0.4	-10%	2.9
Uruguay	0.8	0.7	0.6	0.7	0.7	0.8	0.0	1%	0.7
<b>Southern Hemisphere</b>	<b>54</b>	<b>57</b>	<b>53</b>	<b>49</b>	<b>59</b>	<b>55</b>	<b>-4.3</b>	<b>-7%</b>	<b>54.5</b>

including over 60 percent Champagne, with the other 40 percent crémant; both Champagne and crémant grapes must be hand-picked with the yeast and sugar added in the bottle.

Germany produced 14 percent of the world's sparkling wines or Sekt, using both German and imported grapes, and Spain 11 percent, mostly Cava that adds yeast and sugar in the bottle.

More people are drinking sparkling wine, and not just during end-of-year celebrations. Three countries drink almost half of all sparkling wine, Germany, France, and the US, and the top five countries account for 60 percent of sparkling wine consumption.

Italy is the leading exporter of sparkling wine by volume, and France is the leading exporter of sparkling wine by value. Italy, France, and Spain account for 85 percent of global sparkling wine exports, but only 55 percent of still wine exports.

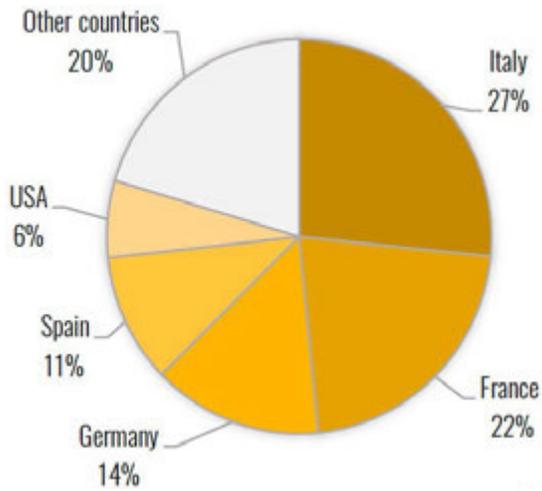
### Spain, Italy, and France Account for Over Half of Global Wine Exports

	Volume (mbl)		Value (m EUR)		Type	Vertical Structure in 2021		Variation 2021/2020	
	2020	2021	2020	2021		volume	value	volume	value
Spain	20.2	23.0	2,634	2,883	bottle (< 2 l)	34%	65%	7%	9%
					sparkling	7%	16%	-2%	16%
					BIB	2%	2%	3%	3%
	variation of 14.0%		variation of 9.5%		bulk (>10 l)	56%	17%	22%	4%
Italy	20.7	22.2	6,274	7,060	bottle (< 2 l)	58%	69%	6%	10%
					sparkling	23%	26%	21%	24%
					BIB	2%	1%	-10%	-8%
	variation of 7.3%		variation of 12.5%		bulk (>10 l)	17%	4%	0%	-3%
France	13.5	14.6	8,736	11,075	bottle (< 2 l)	70%	61%	7%	22%
					sparkling	15%	35%	33%	40%
					BIB	3%	1%	-2%	10%
	variation of 8.0%		variation of 26.8%		bulk (>10 l)	11%	2%	-6%	-4%
Chile	8.5	8.7	1,594	1,664	bottle (< 2 l)	56%	81%	1%	5%
					sparkling	0%	1%	3%	-4%
					BIB	2%	2%	-7%	-6%
	variation of 1.9%		variation of 4.4%		bulk (>10 l)	41%	16%	4%	3%
Australia	7.6	6.3	1,787	1,353	bottle (< 2 l)	38%	72%	-25%	-29%
					sparkling	2%	4%	49%	56%
					BIB	4%	2%	-34%	-38%
	variation of -17.1%		variation of -24.3%		bulk (>10 l)	55%	23%	-10%	-10%
South Africa	3.6	4.8	534	634	bottle (< 2 l)	40%	67%	28%	15%
					sparkling	1%	4%	32%	36%
					BIB	7%	8%	-20%	-10%
	variation of 32.5%		variation of 18.6%		bulk (>10 l)	52%	23%	49%	37%
Germany	3.7	3.7	916	991	bottle (< 2 l)	73%	79%	1%	7%
					sparkling	9%	12%	24%	35%
					BIB	15%	8%	-10%	-9%
	variation of 0.1%		variation of 8.2%		bulk (>10 l)	2%	1%	-15%	9%
Argentina	3.9	3.3	656	700	bottle (< 2 l)	69%	91%	5%	9%
					sparkling	1%	1%	89%	94%
					BIB	0%	8%	233%	149%
	variation of -15.3%		variation of 6.7%		bulk (>10 l)	29%	7%	-47%	-21%
USA	3.6	3.3	1,152	1,231	bottle (< 2 l)	45%	82%	22%	21%
					sparkling	1%	3%	-13%	-29%
					BIB	3%	2%	24%	32%
	variation of -8.9%		variation of 6.8%		bulk (>10 l)	50%	13%	-27%	-35%
Portugal	3.2	3.3	856	924	bottle (< 2 l)	80%	92%	3%	8%
					sparkling	1%	1%	-13%	7%
					BIB	11%	5%	-2%	-2%
	variation of 4.1%		variation of 8.0%		bulk (>10 l)	9%	3%	23%	26%
New Zealand	2.9	2.8	1,146	1,165	bottle (< 2 l)	58%	74%	-3%	6%
					sparkling	1%	1%	-41%	-29%
					BIB	1%	1%	-7%	17%
	variation of -0.6%		variation of 1.7%		bulk (>10 l)	41%	24%	-17%	-8%
Canada	1.7	2.1	47	66	bottle (< 2 l)	0%	29%	25%	73%
					sparkling	0%	2%	-44%	0%
					BIB	0%	1%	25%	33%
	variation of 25.8%		variation of 41.2%		bulk (>10 l)	99%	68%	26%	36%

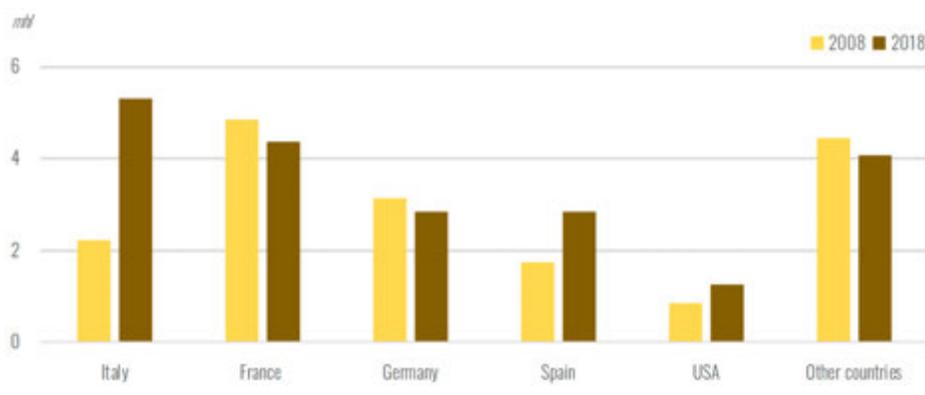
Germany, the US, and UK Accounted for Almost 40% of Global Wine Imports

	Volume (mhl)		Value (mEUR)		Type	2021 Vertical Structure		Variation 2021/ 2020	
	2020	2021	2020	2021		volume	value	volume	value
Germany	14.5	14.5	2 629	2 777	bottle (<2 l)	38%	66%	0%	7%
					sparkling	5%	16%	18%	19%
	variation of 0.0%	variation of 5.6%	BB	1%	1%	-6%	0%		
			bulk (>10 l)	56%	16%	-7%	-9%		
USA	12.3	13.9	5 153	6 242	bottle (<2 l)	53%	68%	5%	15%
					sparkling	14%	26%	38%	42%
	variation of 13.1%	variation of 21.1%	BB	1%	0%	0%	0%		
			bulk (>10 l)	32%	6%	19%	22%		
UK	14.6	13.6	3 806	4 082	bottle (<2 l)	52%	64%	-2%	8%
					sparkling	13%	22%	19%	26%
	variation of -6.7%	variation of 7.3%	BB	1%	1%	-23%	-8%		
			bulk (>10 l)	36%	14%	-19%	-16%		
France	6.3	5.9	765	821	bottle (<2 l)	17%	61%	3%	19%
					sparkling	6%	14%	19%	23%
	variation of -6.0%	variation of 7.3%	BB	3%	2%	-8%	0%		
			bulk (>10 l)	76%	24%	-9%	-19%		
Netherlands	4.7	5.0	1 309	1 447	bottle (<2 l)	86%	84%	8%	9%
					sparkling	8%	13%	33%	33%
	variation of 6.6%	variation of 10.6%	BB	2%	1%	-6%	2%		
			bulk (>10 l)	7%	2%	-16%	-20%		
China	4.3	4.2	1 598	1 430	bottle (<2 l)	68%	86%	-8%	-15%
					sparkling	3%	7%	14%	52%
	variation of -1.4%	variation of -10.5%	BB	1%	1%	28%	38%		
			bulk (>10 l)	29%	6%	17%	14%		
Canada	4.5	4.2	1 727	1 906	bottle (<2 l)	66%	85%	-3%	9%
					sparkling	5%	10%	20%	39%
	variation of -6.9%	variation of 10.3%	BB	2%	1%	3%	10%		
			bulk (>10 l)	26%	4%	-19%	-10%		
Belgium	3.0	3.9	993	1 282	bottle (<2 l)	58%	65%	24%	26%
					sparkling	19%	28%	76%	44%
	variation of 28.9%	variation of 29.1%	BB	8%	3%	103%	52%		
			bulk (>10 l)	15%	4%	-8%	-7%		
Russia	3.5	3.7	949	1 061	bottle (<2 l)	81%	75%	9%	8%
					sparkling	17%	24%	37%	35%
	variation of 5.9%	variation of 11.8%	BB	0%	0%	7%	16%		
			bulk (>10 l)	1%	0%	-86%	-86%		
Italy	1.6	3.0	278	381	bottle (<2 l)	8%	20%	4%	18%
					sparkling	4%	56%	39%	45%
	variation of 82.9%	variation of 37.3%	BB	0%	0%	313%	75%		
			bulk (>10 l)	89%	21%	83%	37%		
Portugal	2.7	2.8	160	161	bottle (<2 l)	23%	33%	27%	18%
					sparkling	2%	15%	20%	0%
	variation of 2.9%	variation of 0.2%	BB	2%	2%	-34%	-40%		
			bulk (>10 l)	73%	50%	0%	0%		
Japan	2.6	2.4	1 365	1 439	bottle (<2 l)	64%	58%	-5%	1%
					sparkling	16%	38%	9%	16%
	variation of -4.8%	variation of 5.4%	BB	6%	1%	6%	6%		
			bulk (>10 l)	14%	2%	-19%	-23%		
Sweden	2.3	2.1	747	748	bottle (<2 l)	47%	58%	-2%	6%
					sparkling	13%	21%	-7%	0%
	variation of -11.1%	variation of 0.1%	BB	27%	14%	-12%	-11%		
			bulk (>10 l)	14%	7%	-33%	0%		

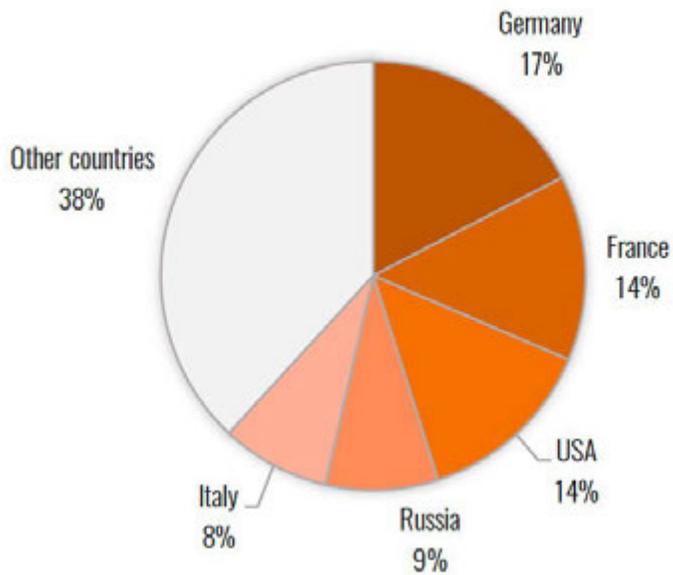
**France and Italy Each Produced About a Quarter of the World's Sparkling Wine in 2018**



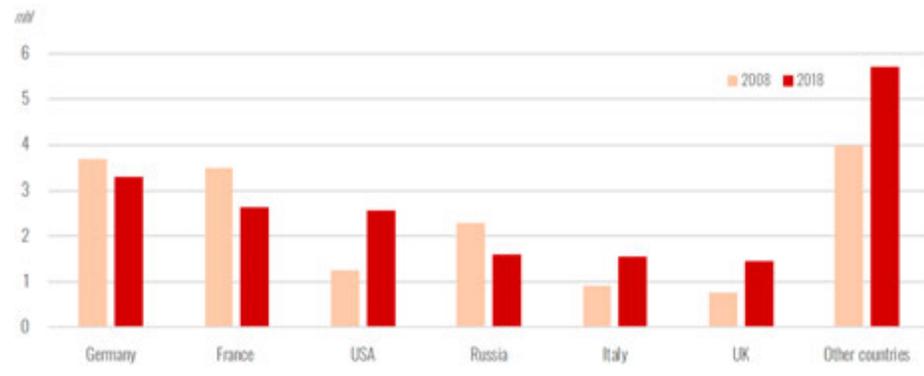
**Italy's Production of Sparkling Wine Almost Tripled Between 2008 and 2018**



**Germany, France, and the US Consume Almost Half of All Sparkling Wine**

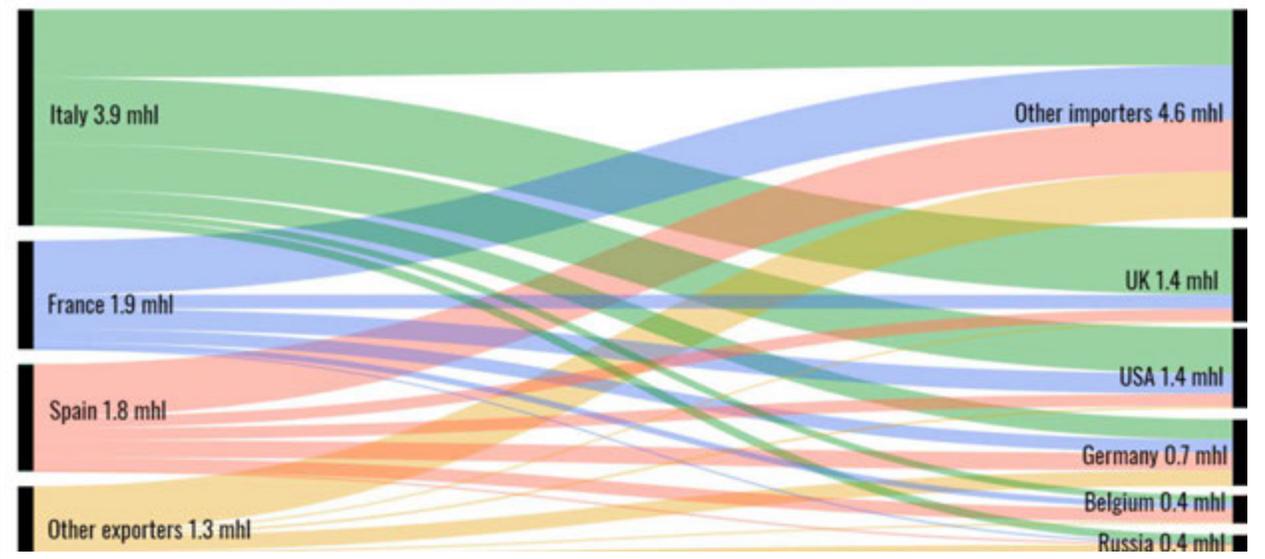


### Sparkling Wine Consumption is Rising in the US and UK



### 2/3 of Italian Sparkling Wine Exports go to the UK and US; Most French and Spanish Sparkling Wines are Exported to Other Countries

Figure 3.10 Main sparkling wine trade flows in 2018



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