OIV
Organisation Internationale
de la Vigne et du Vin

STATE OF THE VITIVINICULTURE WORLD MARKET
MARCH 2011

1. Estimation of potential wine production in 2010

1.1 Within the EU (table 1)

- For the second year, the development of the European Union vineyard has been affected by the implementation of new community regulations. From 2008/2009 until 2010/11 inclusive, this common market structure allows wine producers to receive a permanent abandonment premium based solely on those individuals seeking subsidies within the framework of a budgetary quota, allowing the overall grubbing up of 175 mha over 3 years.

This procedure was implemented after the 2008 harvest and once again affects potential production in the EU in 2010. Implementation in this second year was accompanied by a slightly less attractive premium than that of the previous year, which has led to producers from Member States asking to be allowed to benefit from this measure in smaller proportions, hence 108 mha – compared with 160 mha in the previous year - of requests for permanent abandonment have been submitted at EU level. Given the budget allocated during this, the measure's second year of application, the reduction coefficient applied to these requests was 50.1% (compared with 46.9% in the previous year), while only approximately 54 mha were declared eligible for community financing.

- In fact, examination of the development of areas planted with vines in the main EU countries shows that, as last year, the fall recorded is slightly higher than that resulting from the implementation of this procedure alone.
  Spain is still the main country affected, with an overall reduction in its vineyard of 31 mha (30 mha of which is with a community premium) which is a total fall of 2.8%/2009. The Italian vineyard also suffered an overall reduction estimated to be 14 mha (-1.7%) including approximately 11 mha that can be attributed to the EU premium. France, which before the implementation of the current community regulation, had started to reduce its vineyard using the premiums provided for in the previous community system, sees its vineyard reduced by a further 12 mha (including just over 7 mha with the assistance of premiums from the new permanent abandonment system).

  The Bulgarian and Hungarian vineyards were reduced by 2 mha and those of Portugal and Greece by 1 mha while the other EU vineyards remain relatively stable.

The EU vineyard will therefore reduce by approximately 64 mha which is 1.7% between 2009 and 2010, after being reduced by 93 mha between 2008 and 2009.

NB1: the measure's final year of implementation should lead to a further, but smaller reduction in the EU vineyard between 2010 and 2011, the premium level making the procedure less attractive.

1.2 Outside the EU (table 2)

The information used for this calculation is specified in the aforementioned table.

This information shows that overall, the vineyard outside the EU seems relatively stable for the third consecutive year, despite the Chilean vineyard continuing to grow at a steady pace. Indeed, the Turkish and South African vineyards continue to reduce.

However, it should be noted in particular that potential production in Australia fell by 6 mha after almost 2 decades of growth.

Thus overall, the vineyard outside the EU (with solid growth in the Chinese vineyard at 5 mha), should reach 3920 mha in 2010, which is a surface area equal to that of 2009 and 2008.

Therefore, due to these particularly significant developments in the EU, the total worldwide area under vines (i.e. including the areas under vines not yet in production or harvested), **should once again decrease between 2009 and 2010 by 65 mha (-0.9%), and amount to approximately 7550 mha.**

2. Global wine production in 2010

This is wine production resulting from grapes harvested in autumn 2010 in the northern hemisphere and spring of the same year in the southern hemisphere.

2.1 Within the EU (table 3)

2010 production, like that of 2007 and 2008 is one of the lowest wine productions in the last fifteen years.
Indeed, at **152.9 Miohl excluding juice and musts for the EU** (compared with 162.9 Miohl in 2009) 2010 production did not even reach 2009 levels.

With regards 2009 production, significant quantitative developments were seen in particular in Germany, Italy and even Austria and Romania in terms of their production level (-2.0, -2.6, -0.6 and -1.7 Miohl respectively) while in Spain and France, the fall was slightly less significant (-1.2 and -1.4 Miohl respectively) but only in reference to the rather modest productions, to some extent marked by recent grubbing-up campaigns, such as in Italy. Only Portugal experienced a growth in its production of some 0.9 Miohl.

2.2 Outside the EU (table 4)

For the main southern hemisphere companies, the USA and Switzerland, at **70.6 Miohl** the production level (excluding juice & musts) achieved in 2010 should record a moderate fall compared with 2009 and 2008 production levels which recorded 71.8 and 72.1 Miohl respectively.

This overall trend reflects contrasting developments:

- In 2010, the USA should record a definite fall in wine production in comparison to the high production of 2009, but should nevertheless remain higher than that of 2008 (19.6 Miohl excluding juice and musts, compared with 22 Miohl in 2009 and 19.3 in 2008).
- In South America, the 2010/2009 development is very mixed and contrary to that recorded last year where Chile in 2010 experienced a reduced
  harvest at 8.8 Miohl following 2009's record production which exceeded 10 Miohl.
  At the same time, Argentina saw its production pick up sharply (16.3 Miohl in 2010), in comparison to the modest wine production in 2009 (12.1 Miohl), particularly due to the effect of a lower than usual must storage for this overall grape production level.
  Ultimately, only Brazil records a fall in its wine production for the second consecutive year, recognising however that the trend in grape juice production in this country is clearly improving.
- In South Africa, a similar mechanism to that seen in Argentina has been implemented to limit the decline in wine production which nevertheless fell to nearly 9.2 Miohl (10.0 Miohl in 2009).

- Finally, while production in Switzerland and New Zealand is down slightly in comparison to 2009 (after achieving an increased level in New Zealand for two consecutive years), 2010 production in

Australia recorded a further fall of approximately 0.5 Miohl in 2010 (11,2 Miohl), after the drop of 1.7 Miohl recorded between 2008 and 2009.

Thus (table 5), considering a variability hypothesis of more or less 10% of the 2009 wine production level achieved by countries where there is no information available for 2010, **we can estimate world wine production for 2010 (excluding juice and musts) at between 256.3 and 263.7 Miohl, which is between -5.5% and -2.8 % in comparison to 2009 (260 Miohl mid-range estimate which is -11.2 Miohl / 2009).** Therefore, this is a lower global wine production for produced quantities than those of 2001, 2003 and 2007 and similar to those of 1998 and 2002, which can be described as low, even very modest, particularly in the European Union.

NB2: this 2010 assessment was conducted by estimating the changes between 2009 and 2010 in wine production in the countries that in 2009 represented 87% of provisional world production.

3. Global wine consumption in 2010

Due in particular to the worldwide economic crisis, global consumption in the first fifteen Member States of the EU (table 6) recorded a particularly significant decrease between 2008 and 2009 which was already apparent in the second half of 2008.
Thus, apart from Spain (-0.7 Miohl / 2009), traditional wine producing and consumption countries have seen their 2010 consumption almost stabilise at 2009 levels.
The United Kingdom also recorded a recovery in its demand (+0.5 Miohl / 2009) while other regular import markets remained stable on the whole.

In an initial analysis, consumption in the 15-member EU only declined by 0.2 Miohl in 2010 to reach 119.6 Miohl compared with 119.8 Miohl in 2009, 125.7 in 2008 and 128.3 Miohl in 2007.

Those countries monitored (see table 7), have also felt the effects of the economic crisis, except, according to an initial analysis, a limited number of countries such as Switzerland, Australia and the Czech Republic, given that for these last two countries the recent change in demand showed quite a marked improvement during the year. The 2010 development confirms the trend changes in these three countries.
In the USA *(after experiencing increased demand in North America which led to the United States becoming the second largest internal market in 2007, a growth which, before the economic crisis along with those of China and Russia had been one of the key factors for growth)*, an initial assessment recorded a stabilisation in 2010 demand (27.1 Miohl) similar to its 2009 level, a stabilisation considered as an initial indicator of an increase in consumption by volume (reminder: 2008 consumption at almost 28 Miohl).
While consumption in New Zealand maintains a high level in 2010, that of Chile recovered quite significantly returning to its pre-crisis level (+0.5 Miohl / 2009) after two years of stagnant demand.
Conversely, Argentina saw its demand continue on a downward trend (-0.6 Miohl / 2009).

Using the same analysis method as for wine production, **these developments lead to the 2010 world wine consumption level being estimated at between 230.4 and 242.1 Miohl which is a mid-range estimate of 236.3 Miohl, (-0.2 Miohl / 2009 or -0.1% which, given the margin of error in monitoring world consumption is not significant**).
So, there is a marked stop in the decrease resulting from the crisis that we can reasonably hope is the sign of a return to the pre-crisis trend in world consumption, namely a fairly steady moderate growth. A hope also based on a return to a significant globalisation of the market in 2010 (see below).

NB3: this 2010 assessment was conducted by estimating the changes between 2009 and 2010 in wine consumption in the countries that in 2009 represented 75% of provisional world consumption.

4. Degree of equilibrium in the wine market in 2010 (table 8)

Measured by the difference between world wine production and consumption, **in 2010**, this degree of equilibrium is between **14.2 and 33.3 Miohl**, which is a mid-range estimate of **23.7 Miohl** (-32% / 2009) compared with 34.7 in 2009 and 22.9 Miohl in 2008 and 2007.
So in 2010, truly low world production was faced with a definite lower level of global consumption, but one which compared with last year, had not decreased. This led to an overall tightening of the world market. Nevertheless the brandies market and that of wine destined for industrial use should be replenished without resorting to wine based alcohol stocks. These stocks were probably diminished in the 2 penultimate years but were stabilised during the previous year.
Theoretically, this economic situation is normally conducive to higher prices in the market for table wine without geographical indication (see below).

5. International trade in 2010

Tables 9 and 10 illustrate the trend in the global wine trade.
The world market, considered here as the total exports from all countries (given that the countries monitored account for 94% of global trade) reached **92.1 Miohl in 2010, which is +6.7% / 2009 after recording the first fall since 2000 in trade in 2009 (-2.9 Miohl / 2008).**
However, in an initial analysis, this trend in volume is not automatically accompanied by a development in value.

Indeed as reported last year, companies from export countries may, very broadly adopt one of two attitudes, either focus on maintaining flows and the level of demand by lowering average prices for distributors or maintain these average prices and risk these distributors passing on the decline in demand. In an initial analysis, some countries such as Italy, Australia, or Chile seem to have chosen the first option last year, while Spain and France tended to follow the second. The first adjustment mechanism combines with environmental concerns to offer distributors also affected by the crisis the opportunity to regain some of the created value by seeking to package closer to wine consumption establishments and possibly share in the value of the product's image.

Consequently, the economic crisis has certainly contributed to the upward trend of an increasing amount of trade in bulk wines, already recorded last year.
This also leads to trade which is increasingly complex, where the share taken by re-exports, particularly in trans-continental trade will grow.
The reorganisation of trade (as well as difficulties in monitoring trade purposes such as confusion between bulk and BIB, between source and origin, etc.) is too recent to measure the effects of the different adjustment mechanisms suggested last year and their economic or structural consequences for the future of trade.

In an initial analysis, this trade recovery seems to apply in various degrees to all major export countries, but perhaps more so, and for the first time in over fifteen years, to the traditional countries than to the southern hemisphere countries and the USA.
Countries which if their export potential is taken into account, have best resisted the crisis in terms of **volume** are Chile (+1.0 Miohl exported between 2008 and 2009 then +0.4 Miohl exported between 2009

and 2010), Italy (+1.7 then +1.4 Miohl exported between 2008 and 2009 then between 2009 and 2010 respectively), then New Zealand (+0.2 then +0.3 Miohl respectively) and to a lesser extent Australia (+0.7 then +0.25 Miohl) and Germany (same volume then +0.3 Miohl).
The countries that have almost completely recovered their losses in 2010 are Spain (-2.3 then +2.3 Miohl) and to a lesser extent France (-1.1 then 0.9 Miohl).
Overall, the other countries come out of these two years with a greater cumulative decline in terms of volumes exported, particularly Argentina and the USA.
However, a specific but complex analysis of the developments in value over this period still needs to be consolidated to really determine the countries or organisations that have chosen a medium-term winning strategy.

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Table 1

Development of the total areas under vines in EU vineyards

Unit: mha — Wine vines, table grapes or for drying, in production or awaiting production

Year / Source	2007 OIV figures	2008 OIV (to be published)	2009 Provisional	2010 Forecast	Comments / Sources 2010
Spain	1169	1165	1113	1082	Basis: Expert: reduction in Spanish wine vines between 09 and 10 of 31 mha 30 of which with EU premium applied to 2009 data
France	867	852	837	825	Q. OIV world vitiviniculture data March 2011
Italy	838	825	812	798	OIV estimate for non vat producing areas based on series sent by ISMEA
Portugal	248	246	244	243	Q. OIV world vitiviniculture data March 2011
Greece	117	116	*116*	*115*	OIV estimate (trend basis)
Germany	102	102	102	102	Q. OIV world vitiviniculture data Oct 10
Austria	50	48	45	46	Q. OIV world vitiviniculture data March 2011
EU (1)*	**3393**	**3356**	**3271**	**3213**	**(1) inc. 2,000ha for GB & Lux.**
Hungary	75	72	70	*68*	OIV estimate (PAP EU basis: 2.1 mha)
Romania	209	207	*206*	*205*	OIV estimate (trend basis)
Bulgaria	93	86	81	79	On the basis of development in Q. OIV world vitiviniculture data March 11 + 3.5 mha RTD (NB: excluding areas reserved for family consumption)
other NMS-12	69	66	66	65	OIV direct estimate, (excluding CZ & SLOVAKIA situation 2011)
EU	**3839**	**3787**	**3694**	**3630**	

* First fifteen members of the EU

Table 2

Development of total areas under vines in vineyards outside the EU

Unit: mha

Year	2007	2008	2009 Prov.	2010 Forecast	Comments / Sources 2010
USA	397	398	398	398	Based on USDA info on California
Argentina	226	226	228	228	Q. OIV world vitiviniculture data March 2011
Chile	196	198	199	200	Based on Q. OIV world vitiviniculture data March 2011
Brazil	86	92	92	*92*	OIV estimate
South Africa	133	132	132	*131*	Based on expert statement
Australia	174	173	176	170	(Q. OIV world vitiviniculture data March 11 signals a reduction in wine areas under vines of 162.6 mha to 156.6 mha
New Zealand	30	35	37	37	Based on areas under vines in production for NZ wine
Russia	62	64	*67*	*67*	Report (NB revised series)
Switzerland	15	15	15	15	Equivalent Q. OIV world vitivinicultural data March 11
Turkey	521	518	505	*500*	OIV trend assessment
China	475	*480*	*485*	*490*	OIV trend assessment
Other African countries	248	246	243	243	Direct estimate (often based on FAO forecasts focusing on vineyards in production)
Other countries in the Amer	76	74	75	76	
Other European countries	638	645	647	650	
Other Asian countries	633	624	622	623	
Total outside the EU	3910	3920	3921	3920	

Estimation of total world surface area under vines

Unit: mha, Source: same as Table 1

2007	2008	Prov. 2009	2010 forecast
7749	7707	7615	7550

WINE PRODUCTION (excluding musts and juice)

Table 3
Developments in EU wine production (excluding juice and musts)

Unit: mhl
Source: OIV / EEC DGVI E2 / experts / press and internet (official websites)

	Germany	Austria	Greece	Spain*	France*	Italy**	Portugal	others	EU *
2009 Provisional productio	9139	2352	3366	35166	46361	47450	5868	161	**149863**
2010 Provisional productio	7185	1737	3100	33999	44963	44840	6760	140	**142724**
Difference 2010 - 2009	-1954	-615	-266	-1167	-1398	-2610	892	-21	**-7139**

NB: production presented here does not contain any type of juice or must
* First fifteen members of the EU

For the 8 viticultural NMW of the EU (HU, SL, CY, CZ, SK, MT, RO, BU)	Group of 8 viti NMS	*including*			EU
		Hungary	*Romania*	*Bulgaria*	
2009 Provisional production	12935	3198	6703	1397	**162898**
2010 Provisional production	10089	2500	4957	1426	**152913**
Difference 2010 - 2009	-2846	-698	-1746	29	**-9985**

including production by the Baltic states

Table 4
Wine production of several countries outside the EU (excluding juice & musts)

Unit: mhl
Source: OIV experts / Trade press and internet (official websites)

Year / Source	2008 OIV (to be published)	2009 Provisional	2010 Forecast	Comments / Sources 2010
USA	19330	21960	19620	Estimate made from USDA statistics on production and the destination of fresh grapes by state
(Juice + must production)	5800	7200	6300	
Argentina	14676	12135	16250	INV / Forecast rec 2011: approx. *17225 mhl wine production*
(Wine + juice + must production)	*21058*	*15995*	*19731*	
(Juice + must production)	6382	3860	3481	
Chile	8683	10093	8844	2011 forecast: 10 Miohl
Brazil	3683	2720	2454	Estimate based on Ibravin
Switzerland	1072	1112	1027	Q. OIV world vitivinicultural data 2011
South Africa	10165	9986	9217	SAWIS March 11: 2011 forecast: 9247mhl + 444mhl "non alcoholic"
("non-alcoholic" production)	725	592	582	
Australia	12448	11710	11240	Q. OIV world vitivinicultural data March 11:
New Zealand	2052	2050	1900	NZ Winegrowers (forecast.11:± 2400 mhl)
Total monitored outside the EU	**72109**	**71766**	**70552**	

Table 5: Evaluation of world production of all types of wine in 2010

For those countries where 2010 information is available, in 2009 represented (OIV): 234,7 Miohl
which is an amount equivalent to: 87% of 2009 world wine production (Reminder: 271,2 Miohl)
which is a fall in production of: 36,5 Miohl, here we estimate the 2010 production level for countries with
no information using a variability of: 10% from the 2009 result.

in millions of hl

2006 Definitive	2007 Definitive	2008 to be published	2009 Provisional	2010 Forecast			2010 / 2009 in %		
282,7	266,0	268,1	271,2	256,3	to	263,7	-5,5%	to	-2,8%
				mid-range estimate	260,0			-4,1%	

Table 6

Developments in EU wine consumption

(NB the economic monitoring of new member states to the EU has not enabled us to come up with a forecast for the EU-27)

Unit: mhl

Sources: OIV experts, assessment of consumption per calendar year from information collected up to 2009 and/or information available from the EU per year + panels & national statistics offices for some countries.

	Germany	Austria	Greece	Spain	France	Italy	Portugal
2009 Provisional	20250	2400	3029	11271	29304	24600	4515
2010 Forecast	20205	2400	2955	10600	29438	24500	4447
Difference 2010 / 2009	-45	0	-74	-671	134	-100	-68

	Belg.+Lux.	Denmark	Ireland	e Netherlar	Finland	Sweden	UK	EU-15
2009 Provisional	3108	1890	684	3460	597	2010	12680	119798
2010 Forecast	3101	1930	710	3470	606	2010	13200	119572
Difference 2010 / 2009	-7	40	26	10	9	0	520	-226

NB: review of the DK and UK series based on the official series from the National Statistics Offices

* First fifteen members of the EU

Table 7

Wine consumption in several countries outside the EU*

Unit: Millions of hl

Source: OIV experts / Trade press

Year	2008 to be published	2009 Provisional	2010 Forecast	Comments
USA (new series)	27950	27250	27110	OIV estimate based on various sources (impact data bank / wine handbook
Switzerland	2911	2885	2900	OIV trend estimate
Argentina	10677	10342	9714	QOIV world vitivinicultural data March 11
Chile	2339	2605	3118	QOIV world vitivinicultural data March 11
Brazil	3265	3508	3500	Report
South Africa	3558	3384	3467	SAWIS
Australia	4921	5198	5325	QOIV world vitivinicultural data March 11
New Zealand	874	917	905	NZ wine based on individual consumption
Czech Republic	1974	2006	2034	Q OIV world vitivinicultural data 11
Total monitored outside the EU*	58469	58095	58073	

* First fifteen members of the EU

Evaluation of world consumption of all types of wine in 2010

For those countries where 2010 information is available, in 2009 represented (OIV):			177,9	Miohl
which is an amount equivalent to:	75%	of 2009 world wine consumption (Reminder:	236,5	Miohl)
which is a fall in quantity of:	58,6	Miohl, here we estimate the 2010 consumption for countries with no available in		
using a variability of:	10%	from the 2009 provisional result.		

in millions of hl

2006 Definitive	2007	2008 to be published	2009 Provisional	2010 Forecast			2010 / 2009 in %		
244,0	249,2	245,2	236,5	230,4	to	242,1	-2,6%	to	2,4%
			mid-range estimate		236,3			-0,1%	

Table 8

Degree of equilibrium in the world wine market

in millions of hl	2007	2008 to be published	2009 Provisional	2010 Forecast					
Wine production	266,0	268,1	271,2	256,3	to	263,7			
Wine consumption	249,2	245,2	236,5	230,4	to	242,1	2010 / 2009 in %		
Difference	16,8	22,9	34,7	14,2	to	33,3	-59%	to	-4%

TABLE 9 **EXPORT VOLUMES & WORLD MARKET SHARE by CALENDAR YEAR**

NB The world market is defined here as the total exports from all countries.

Export countries of origin *in millions of hl*		France	Italy	Spain	Germany	Portugal	CCEE (1)	South America (2)	USA	South Africa	Maghreb (3)	Oceania (4)	Moldavia*	Σ zones monitored	**WORLD MARKET**
Avg. 1981-1985	vol.	10,2	17,3	5,9	2,6	1,4	6,1	0,3	0,3	0,1	0,9	0,1	NA	45,2	49,5
Source OIV	%	21%	35%	12%	5%	3%	12%	1%	1%	0%	2%	0%		91%	100%
Avg. 1986 - 1990	vol.	12,8	12,6	4,6	2,7	1,6	3,9	0,4	0,6	0,0	0,6	0,3	NA	40,1	43,5
Source OIV	%	29%	29%	11%	6%	4%	9%	1%	1%	0%	1%	1%		92%	100%
Avg. 1991 - 1995	vol.	11,5	15,1	7,4	2,7	1,9	2,4	1,5	1,2	0,4	0,2	1,1	1,4	46,7	51,1
Source OIV	%	22%	29%	14%	5%	4%	5%	3%	2%	1%	0%	2%	3%	91%	100%
Avg. 1996 - 2000	vol.	15,3	14,8	8,8	2,3	2,1	2,8	3,3	2,3	1,2	0,2	2,2	1,3	56,7	60,9
Source OIV	%	25%	24%	14%	4%	4%	5%	5%	4%	2%	0%	4%	2%	93%	100%
Avg. 2001 - 2005	vol.	14,8	15,0	12,1	2,6	2,6	1,9	5,5	3,2	2,4	0,3	5,8	1,9	68,1	72,2
Source OIV	%	20%	21%	17%	4%	4%	3%	8%	4%	3%	0%	8%	3%	94%	100%
Avg. 2006 - 2010p	vol.	13,9	18,8	15,6	3,6	2,8	1,6	9,4	4,1	3,6	0,2	8,6	0,9	83,1	88,6
Source OIV	%	16%	21%	18%	4%	3%	2%	11%	5%	4%	0%	10%	1%	94%	100%
2007	vol.	15,2	18,5	15,1	3,5	3,4	1,9	9,7	4,2	3,1	0,2	8,6	0,6	83,9	89,4
see below	%	17%	21%	17%	4%	4%	2%	11%	5%	3%	0%	10%	1%	93,9%	100%
2008 to be published	vol.	13,7	17,5	16,9	3,6	2,9	1,8	10,0	4,6	4,1	0,2	7,9	1,0	84,2	89,9
see below	%	15%	19%	19%	4%	3%	2%	11%	5%	5%	0%	9%	1%	93,7%	100%
2009 Provisional	vol.	12,6	19,2	14,6	3,6	2,3	1,4	9,7	4,0	4,0	0,1	8,8	1,0	81,3	87,0
see below	%	14%	22%	17%	4%	3%	2%	11%	5%	5%	0%	10%	1%	93,4%	100%
2010 Forecast	vol.	13,5	20,6	16,9	3,9	*2,6*	*1,3*	10,0	4,1	3,8	*0,2*	9,4	*1,0*	87,3	*92,9*
see below	%	15%	22%	18%	4%	3%	1%	11%	4%	4%	0%	10%	1%	*94,0%*	100%

(1): Bulgaria + Hungary + Romania (2): Argentina + Chile (3): Algeria + Tunisia + Morocco (4): Australia + New Zealand *: Avg. 92-95

SHARE of world trade	**81/85 avg.**	**86/90 avg.**	**91/95 avg.**	**96/00 avg.**	**01/05 avg.**	**2010 forecast**
5 leading EU exporters (Germany, Spain, France, Italy, Port	75,6%	78,8%	75,5%	71,2%	65,2%	61,9%
"Southern Hemisphere" (Argentina, Chile, SA, Aus/NZ)+ U	1,6%	3,1%	8,0%	14,8%	23,4%	29,4%
CCEE and Maghreb	14,1%	10,3%	5,1%	4,9%	3,1%	1,6%
Other countries	8,7%	7,8%	11,4%	9,0%	8,4%	7,1%

Data from national customs statistics & Uncomtrade/GTA unless otherwise specified. If this data is not available, then information is used from OIV Experts and the press, to which information from the EU harvest assessments is added at an EU level. Maghreb & Moldavia in 2010: direct OIV estimate (based on trends)

CCEE OIV estimate based on prov EU assessment 08/09

The coefficient of 94% represents the share of world trade by countries monitored on average for 2006-2009 and is carried forward to 2010 to assess the world market.

Table 10
Share of world trade in world wine consumption

in millions of hl	2005	2006	2007	2008 to be published	2009 Provisional	2010 Forecast			2010 mid-range estimate	10/09 in %
I: World wine consumption	238,4	244,0	249,2	245,3	236,6	230,4	to	242,1	236,3	-0,1%
II: World Market (ref Table 9)	78,9	83,8	89,4	89,9	87,0	92,9	to	92,9	92,9	6,8%
II / I in %	33,1%	34,3%	35,9%	36,7%	36,8%	38,4%	to	40,3%	39,3%	7,0%