OIV
Organisation Internationale
de la Vigne et du Vin

STATE OF VITIVINICULTURE WORLD REPORT
MARCH 2009

NB: The OIV 2006 statistics shall be published shortly. The 2006 data from this report shall be used in the coming publication except for a few exceptions. 2007 data must nevertheless be considered provisional.

1. Estimation of 2008 potential wine production

1.1 Within the EU-27 (table 1)

The estimation of community vineyards is waiting for the results of the first year of the implementation of the new community regulations. This new common market organisation provides that starting from the 2008/2009 season and lasting until the 2010/11 season, vine growers shall be eligible to receive definitive grubbing premiums, based on those individuals seeking subsidies within a budgetary framework involving grubbing 175 mha over 3 years of which 70 mha during the first season. This procedure is set up subsequently to the 2008 harvest, during the 2008/09 season. 2009 vineyards, on an overall community level, shall reflect the consequences of this regulatory modification.

The expectations of this procedure, in addition to stopping the decreasing trend have led the vast majority share of community vineyards to pursue a slowing decline in vineyards. Two exceptions to this trend can be noted:

- Firstly France which since the past 2 seasons has widely allowed grubbing on its territory has been affected, since the 2004 production, by the largest decrease in rates and the maintaining of low rate levels during the 2007/2008 season (despite a modest 2007 production). This phenomena has led to grubbing being pursued: a decrease of nearly 15 mha between 2007 and 2008,
- As such, 12 new members of the EU, the largest of them, are committed to the move to restructure their respective vineyards while they have experienced a decrease in vineyards which are the most inadequate to competition and for which investment capacity is reduced. These combined factors have led to a decrease of nearly 14 mha between 2007 and 2008.

As such, EU now at 27 members, **with its total community vineyards,** has decreased once again and posted **3818 mha in 2008, which is a new record decrease of 33 mha / 2007.**

1.2 Outside the EU-27 (table 2)

The data used for this evaluation are specified in the above-mentioned table. By taking into account the decrease in Turkish vineyards since 2003 (calculated with updated information provided by Turkey) a more precise evolution of outside the community vineyards was obtained, with a reserve made on estimates made after 2005 on the evolution of Chinese vineyards (which is based on experts' assessment of stabilisation). This information show that after experiencing growth of 18 mha between 2006 and 2007 (particularly in Oceania and in South America), the growth rate of these vineyards is lower than between 2007 and 2008 since the level reached 5 mha. The 2 growth poles are New Zealand (+ 5 mha) and Russia (+4 mha), while relative modest growth rates are cancelled out by the estimated decrease in Turkish vineyards.

Outside the EU-27, vineyards should reach 4043 mha in 2008.

As such, total worldwide areas under vines, with its evolutions, under the influence of community evolutions, should decrease between 2007 and 2008 by 28 mha (-0,35%), and amount to approximately 7861 mha.

2. Global wine production in 2008

The production in question results from grapes harvested in the autumn of 2008 in the northern hemisphere and spring in the southern hemisphere of the same year

2.1 Within the EU-27 (table 3)

The 2008 production, like the 2007 and 2002 productions, is among the lowest production of wine levels recorded over the last fifteen years in EU-15, as well as in EU-27.
The 2008 production, not including juice and musts, shall account for 147,6 Miohl (compared to 151,3 in 2007) for EU-15 and **161,6 Miohl** (compared to 163,7 in 2007) **for EU-27**. The latest revisions recorded in 2008 highlight the decreases recorded in EU-15 (close to 3,7 Miohl) which is in part compensated by production growth in 8 new member viticulture countries (1,7 Miohl), particularly production in Romania (+1,5 Miohl /2007).
In relative terms compared to the 2007 production, quantitatively significant evolutions have occurred particularly in France (-4,6 Miohl vinified, which results in the 2008 vinified production with 41,4 Miohl, the lowest production level since) and to a lesser extent Spain (-2,2 Miohl). Production growth has however been substantial in relative terms in Austria, and significant in absolute terms in Italy (+2,7 Miohl).

2.2 **Outside the EU-27** (table 4)

The latest available data on the USA related to the production of wine grapes show a downshift in forecasted 2008 production levels, posted at approximately 19,2 Miohl not including juice and musts (that being -0,7 Miohl / 2007).
Besides this downward revision related to information collected in October 2008, other countries have recorded upswings. While vitivinicultural production levels (not including juice and musts) in South America have overall remained at a high level in 2008 (a slight decrease in Argentina was compensaed by a high Chilean production). Very high production levels have been recorded in South Africa and in New Zealand. New Zealand production went over 2 Miohl, while production in South Africa reached 10,3 Miohl (not including concentrated musts).
It is to be reminded that Australia experienced severe draught in 2007. Due to rain at the end of the season the 2008 production was more in line with its potential and reached 12,4 Miohl which corresponds to growth of 2,8 Miohl compared to the catastrophic production in 2007 (9,6 Miohl).
Despite a slight drop in 2008, Russian production has grown and is posted at over 7 Miohl of wine.

As such, overall wine production for countries outside the EU-27 reached 78,9 Miohl compared to 75,8 in 2007 and 77,9 in 2006 (A very large harvest was reported in Australia is to be noted).

In this manner (table 5), taking into account a hypothetical variation of more or less 10% of wine production level for 2007 reached by countries for which we have no available information for 2008, **world wine production in 2008 (not including juice and musts) is between 266,6 and 272,3 Mio hl, that being – 0,7 and +1,5 % compared to 2007 (close to 269,4 Miohl estimated mean: +1 Miohl / 2007)**. This overall production of wine, with a similar quantity produced in 2001, 2003 and 2007, can be qualified as low, particularly in the European Union.

NB: This 2008 evaluation 2008 was carried out by evaluating the evolutions between 2007 and 2008 of viniculture countries representing 89% of the provisional 2007 world production.

3. Global wine consumption in 2008

Given that we do not have sufficient information available on the consumption levels of new EU members, this year the monitoring is based on EU-15

Overall consumption of EU-15 (table 6) has decreased once again and this is particularly noticeable in 2008. In effect, traditional large producers and consumers continue a decreasing trend and to this can be added the effects of the crisis which were particularly strong in certain importer countries during the third quarter in 2008, especially due to the end of the year holidays. An initial approach shows that EU-15 consumption in 2008 has decreased and reached 125,8 Miohl (-2,2 Miohl / 2007). As previously announced it can be noted that following 15 growth years and despite a swing back in 2007, consumption in the United Kingdom tends to be stabilising in terms of volume. The crisis and the faltering exchange rate parity of pound sterling has caused an increasing pressure on the purchase price for suppliers, particularly for British large scale distributors.

For those countries monitored outside the EU-15, (cf. table 7), one can note contrasting changes. The increase of wine consumption at a substantial rate continues in the USA (for the first time the US domestic market in 2008 has surpassed the domestic market in Italy: 27,3 Miohl compared to 26 Miohl),

which would likewise seem to be the case in Canada. (NB: the world economic crisis would appear to affect differently the different market segments. The ultra premium and icon segments have suffered due to the significant decrease in purchasing power of their clientele, particularly at the end of 2008).
While consumption continues to grow in Australia with over 4,9 Miohl consumed in 2008, New Zealand stands pat following a period of heavy growth.
After oscillating with a domestic market close to 11 Miohl, Argentina has taken off again, while Brazil is having a difficulty taking off.
Nevertheless Chile which had experienced a taking off gain in its consumption levels last year, has maintained the same trend in 2008 and has posted close to 2,9 Miohl. Access of the black population in South Africa to wine consumption provides hope for a growing domestic market over the medium-term (consumption maintained at 3,6 Miohl in 2008).
A significant growth trend can likewise be seen in wine consumption in the Czech Republic.

Using the same approach to wine production, world wine consumption in 2008 can be encompassed between 237,1 and 248,7Mio hl, that being 242,9 Miohl an erosion of world demand in estimated mean / 2007 : (-2,0 Miohl) within the context of growing worl demand which began in the middle of the 1990's : This erosion is mainly due to the decrease in volume of demand in the EU, which only partially compensates growth in consumption in North America.

NB: Reminder: This evaluation of world demand is based on ***taking into account apparent consumption in China based on a balance sheet****. (estimation based on FAO data****) « Production + Import – export »****, which leads to assimilating beverages for which grapes are included in the composition (including distilled beverages since no data is available on wine transformation. Other unofficial evaluations using the sales of companies which produce wine along the lines of the OIV, but for which we do not know the exhaustive nature of the data, provides a quantification half the amount calculated. Taking into account this quantification shall lead to a rupture in the statistical series (since the definition of wine has been defined in China since only 2003).*

NB: This evaluation was carried out by evaluating changes between 2007 and 2008 in viniculture consumption in countries representing 76% of provisional world consumption in 2007.

4. Degree of equilibrium of the wine market in 2008 (table 8)

Measured by the difference between world production and consumption of wine, this degree of equilibrium **in 2008 was between 17,8 and 35,3 Mio hl**, that being **26,5** in middle of estimated mean compared to 23,5 Miohl in 2007 and 41,0 Miohl in 2006 .
As such in 2008, the brandy and industrial use wines which were well supplied with the large wine production in 2004, and with substantial availabilities from the 2005/2006 and 2006/07 harvests should put priority on using previously supplied stocks, particularly previously wine alcohol collected during the 2007/2008 harvest.
Due to 2 successive low productions and thus a « normal » carry over stock 2008, available stocks are insufficient to cover all industrial needs.
Theoretically this cyclical situation fosters an increase in rates of the table wine market with no geographic indication (cf infra).

5. International trade in 2008

Tables 9 and 10 illustrate the scale of the global wine trade which, after a setback in 2000, started to rally once again in 2001.
The world market, considered here as the sum of exports for all countries (taking into account the fact that the countries monitored together represent 94% of world trade), in 2008 reached in absolute value **89,1 Miohl – 0,7% / 2007 revised to 89,8 Miohl). This constitutes a cooling off period in the growth in world trade.** In addition, as indicated last year, a part of this trade growth would seem to come from re-exports, particularly within the context of trans-continental trade. For logistical reasons, it is possible that a certain exporter country may prefer to transit a bulk export wine through a country near the final destination country. Bottling or regrouping orders may be carried out in the transit country prior to delivery to the final customer country.
Subject to these re-exports, which may only be partially removed with a detailed analysis of world trade (particularly by distinguishing bulk flow from packaged flow), international trade represents a relative value of nearly 38% of world consumption in 2007 (compared to barely 18% in the beginning of the 1980s and 35% in 2006).

All large recent world exporters saw their exports grow in 2008 compared to 2007, except for Australia which has been affected by a reduction in available stock further to low production levels in 2007. This is particularly obvious in South Africa, but the growth rate is difficult to manage when taking into account the evolution of vineyards.
South America is influenced by the growth of Argentinean exports and the USA is likewise concerned by growth in exports.
Italy, having returned to normal production levels in 2004 is since the 2005/2006 season once again the leading country in terms of volume of wine exports. In 2008, with close to 17,2 Miohl in exports (-1,3 Miohl/2007), Italy maintains this position and represents 19% of world trade followed by Spain which reached 16,5 Miohl (+1,4 Miohl/2007) and has recorded heavy growth with low level wines. France has decreased substantially in 2008 in terms of volume (-1,6 Miohl / 2007) and represents just 15% of volume of world trade. This decrease is much less substantial in value terms for which France remains the world leader. Contrary to what we announced in 2007, Moldavia has only experienced an increase in exports in 2008, but has not returned to its previous position.

The group of 6 new exporter countries (Southern hemisphere and the USA) continue to gain market shares and reached 30 % of trade in 2008 (28,5% in 2007).

6. Price performance on certain production markets

(See attached graphs drawn up by Viniflhor)

Results are presented concerning **table wines with no geographic indication** from Spain, Italy and France, based on various sources (La Semana Vitivinícola, ISMEA and Viniflhor).
The graphs highlight the substantial increase in table wine prices with no indication of sources in France and in Italy and also in Spain from the beginning of the 2007 harvest linked to the scarcity of available stock (further to a low production in 2006 and 2007). This is following a big decrease in price linked on the contrary to the high 2004 production. Close to two and a half red and rosé seasons and one and a half seasons in whites on these (only in Italy and in France) were required to absorb the impact of 2004.
The fact that prices have not really recovered may be linked to an overall decrease in domestic demand for wine, but also to already noted or anticipated difficulties of exports towards certain markets such as Russia. The crisis in this country has lead consumer to favour lower cost local supplies. Competition in the wine import sector is fierce with outside the community suppliers, such as Argentina.

Differences in the speed of price recovery lead in 2007/2008 to matching (or just going over) the price levels of white table wine with the prices of red and rosé wine, particularly in Italy and in Spain where red and rosé table wine prices are traditionally higher than white wine prices. This phenomena has decreased in 2008, particularly in Spain, but also in Italy to a lesser extent.

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AREAS

Table 1
Evolution of EU 27 areas under vines

Unit: mha Wine vines, table grapes, or for drying, in production or not yet in production

Year / Source	Reminder 2005 OIV	2006 OIV (to be published)	Provisional 2007	Forecast 2008	Comments / Sources 2008
Spain	1180	1174	1169	1165	base: + 2mha sup in wine prod at 1098 mha (Qconj 09) while maintaining table grapes and for drying at 21300 and 1600 ha in prod + 45mha of sup.not in production.
France	894	887	867	852	Consequence of definitive grubbing:14 mha
Italy	842	843	842	840	estim. OIV base trend & Qstate cond09
Portugal	248	249	248	250	base expert : +2,5 mha S.wine in prod.
Greece	113	112	117	116	Q conjOIV March 09
Germany	102	102	102	102	Q conjOIV March 09
Austria	52	50	50	51	base Qstate condOIV09 : +1,4 mha S.wine in prod.
EU-15 (1)	**3433**	**3418**	**3398**	**3379**	**(1):y.c.2000ha pour GB & Lux.**
Hungary	83	78	75	*72*	estimation OIV (base trend)
Romania	217	213	205	*201*	estimation OIV (base trend)
Bulgaria	95	102	100	95	estimation base Qnote condOIV 09 (NB: not incl sup. reserved for family consumption)
other EU-12 new meml	72	71	73	*71*	estim. direct OIV (not incl CZ & CHY)
EU-27	**3900**	**3882**	**3851**	**3818**	

Table 2
Evolution of areas under vines outside of EU-27

Unit: mha

Year	2005	2006	Prov. 2007	orecast.20(	Comments / Sources 2008
USA	399	406	409	411	USDA sup. in prod.
Argentina	219	223	226	225	Q.Statecond.OIVmars09
Chile	193	195	196	198	Q. StatecondOIV March 09 for sup prod.
Brazil	79	94	97	100	base expert
South Africa	134	134	133	132	base expert
Australia	167	169	174	173	Q.StatecondOIVMarch09
New-Zealand	25	27	30	35	base sup prod by Nzwine
Russia	71	64	71	75	Q StatecondOIV March09
Switzerland	15	15	15	15	Q StatecondOIV March09
Turkey	555	527	510	500	estimation OIV base trend
China	485	490	500	*500*	R
Other countries in Afric	261	261	260	259	direct estimation (frequently based on FAO forecasts on vines in production)
Other countries in Ame	77	77	76	77	
Other countries Europe	673	669	670	669	
Other countries Asia	672	669	671	674	
Total outside EU-27	4025	4020	4038	4043	

Approching total world vineyard surface area

Unit: mha, Source: idem table 1

2005	2006	Prov. 2007	Forecast.2008
7925	7902	7889	7861

Wine production (other than juice and musts)

Table 3
Evolution of wine production in EU-27 (not incl juice & musts)

Unit: mhl
Source: OIV / CCE DGVI E2 / experts / press and internet (official sites)

	Germany	Austria	Greece	Spain*	France*	Italy**	Portugal	others	EU-15
Prod. provisional 2007	10263	2628	3511	36781	46000	45900	6042	164	**151289**
Prod.forecast 2008	10400	2922	3800	34630	41429	48633	5596	147	**147557**
Spread 2008 - 2007	137	294	289	-2151	-4571	2733	-446	-17	**-3732**

* 2008: Harvest.SP=40,3 Miohl, of which 5,7 Miohl juice and concentrates / Harvest.FR = between 42,4 Miohl, of which 1,0 Miohl juice and/or concentrate
** :Harvest.IT= between 50,3 and 51,3 Miohl in 2008, of which 1,5 and 2,8 Mio hl juice and/or concentrates according to sources

for 8 EU-27 viti new member states (HU, SL, CY, CZ, SK, MT, RO, BU)	8 viti new member states	*of which* *Hungary*	*Romania*	*Bulgaria*	EU-27
Prov production of wine OIV 2007	12372	3222	5289	1796	**163661**
Forecast production 2008	14045	3500	6789	1800	**161602**
Spread 2008 - 2007	1673	278	1500	4	**-2059**

Table 4
Wine production of countries outside EU-27 (other than juice & musts)

Unit: mhl
Source: Experts OIV / Professional press and internet (official sites)

Year / Source	2006 OIV (to be published)	Provisional 2007	Forecast 2008	Comments / Sources
USA	19440	19910	19200	Estimation based on USDA state by state statistics on production and use of fresh grapes
(Production juice+musts)	5500	6400	5600	
Argentina	15396	15046	14677	QOICconj09 /
(Wine production+juice+musts)	*21783*	*23152*	*21061*	forecast. 2009 : *19,9 Miohl wine juice & musts* ,
(Production juice+musts)	6387	8106	6384	approx 13,9 Miohl of wine
Chile	8448	8227	8683	QOIVconj09 (+1447mhl musts and juice in 08): Forecast. 09: 8,8 Miohl (expert)
Brazil	2372	3502	3500	estimation Embrapa
Switzerland	1011	1040	1073	expert
Russia	6280	7280	7110	QOIV conj 09 (Sparkling wine incl)
South Africa	9398	9783	10261	Source: SAWIS /forecast.09:10054 mhl (J&
(production"non alcoholic")	732	652	669	M incl)/- 8%/08,of which approx.9,4 Mhl wine
Australia	14263	9550	12365	QOIVconj09 Forecast 09 : 11,4 Miohl
New Zealand	1332	1476	2052	NZWine/(forecast.09:± 275mT (285 in 08) or -3,5%/08, close to 2Miohl)
Countries not incl EU-27	**77940**	**75814**	**78921**	

TAB.5: Evaluation of world production of all types of wine in 2008

For those countries for which we have information available for 2008, represented in 2007 (OIV).: 239,5 Mio hl
a proportion equivalent to: 89% of world wine production in 2007 (Reminder...: 268,4 Mio hl)
a lacking production of: 28,9 Mio hl, level of production 2008 of the countries not covered
, using a varibility of: 10% ,based on 2007 results.

in Mio hl

Definitive 2004	Definitive 2005	2006 to be published	Provisional 2007	Forecast 2008			2008 / 2007 in %		
296,8	282,2	283,7	268,4	266,6	to	272,3	-0,7%	to	1,5%
			estimated mean	269,4			0,4%		

Wine consumption / Statement

Table 6
Evolution of wine consumption in EU-15

(Nb the follow up of new EU members does not allow us to make a forecast for EU-27)

Unit: mhl

Sources: OIV experts, evaluation of consumption by calendar year from info collected up until 2007 and/or information available from EU by season + panels & national statistics offices for some countries.

	Germany	Austria	Greece	Spain	France	Italy	Portugal
2007 provisional	20152	2450	3300	13271	32169	26700	4805
forecast 2008	20000	2400	3150	12790	31750	26000	4800
Spread 2008 / 2007	-152	-50	-150	-481	-419	-700	-5

	Belg.+Lux.	Denmark	Ireland	Netherland	Finland	Sweden	nited Kingdo	EU-15
2007 provisional	3141	1780	734	3555	559	1768	13702	128086
forecast 2008	3139	1760	650	3600	520	1794	13483	125836
Spread 2008 / 2007	-2	-20	-84	45	-39	26	-219	-2250

NB: revision of DK & UK series based on official national statistics series

Table 7
Wine consumption in some countries outside EU-15

Unit: thousands of hl

Source: Experts OIV / Professional press

Year	2006 to be published	Provisional 2007	Forecast 2008	Comments
USA	25900	26500	27250	Estim OIV base trend
Switzerland	2806	2920	2890	base expert March 09
Argentina	11103	11166	10672	Quest State of Cond report 09
Chile	2380	2980	2900	Estim OIV base expert March 09
Brazil	3466	3254	3200	estim OIV by var.to bilan Prod+Imp-Exp.
South Africa	3407	3557	3576	forecast. SAWIS
Australia	4583	4769	4912	Quest State of Cond report09
New-Zealand	860	918	874	Nzwine
Norway	633	658	670	Estim OIV base ovol imp.9 months (UbiFR)
Czech Rep.	1300	1770	1813	Quest State of Cond report09
Countries reported on outside EU-15	56438	58492	58757	

Evaluation of world consumption of all types of wine in 2008

The countries we have information available in 2008, represented in 2007 (OIV:			186,6	Mio hl
a proportion equivalent to:	76%	of world wine 2007 consumption (Reminder:	244,9	Mio hl)
a quantity lacking of....:	58,3	Mio hl, 2008 consumption of countries not communicated,		
using a variability of .....:	10%	, based on provisional results in 2007.		

in Mio hl

Definitive 2004	Definitive 2005	2006 to be published	Provisional 2007	Forecast 2008			2008 / 2007 in %		
239,5	239,2	242,7	244,9	237,1	to	248,7	-3,2%	to	1,6%
		in middle of estimated mean		242,9				-0,8%	

Table 8
Degree of equilibrium of world wine market

in Mio hl	Definitive 2005	2006 to be published	Provisional 2007	Forecast 2008					
Vinified production	282,2	283,7	268,4	266,6	à	272,3			
Wine consumption	239,2	242,7	244,9	237,1	à	248,7	2008 / 2007 in %		
Spread	43,0	41,0	23,5	17,8	à	35,3	-24%	to	50%
				26,5	middle of estimated mean			13%	

TABLE 9 **VOLUMES EXPORTED & WORLD MARKET SHARE by CALENDAR YEAF**

NB World trade is defined here as the sum of all countries' exports.

Countries of origin of exports in Millions of hl		France	Italy	Spain	Germany	Portugal	CEE (1)	South America (2)	USA	South Africa	Maghreb (3)	Oceania (4)	Moldavia *	Σ areas covered	**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	ND	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	ND	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	72,4
Source OIV	%	20%	21%	17%	4%	4%	3%	8%	4%	3%	0%	8%	3%	94%	100%
2005	vol.	14,1	15,7	14,4	3,0	2,6	2,0	6,4	3,5	2,8	0,4	7,5	2,4	74,8	79,7
cf infra	%	18%	20%	18%	4%	3%	3%	8%	4%	4%	1%	9%	3%	93,9%	100%
06 to be published	vol.	14,7	18,4	14,3	3,2	2,9	2,1	7,7	3,8	2,7	0,4	8,2	1,0	79,4	84,6
cf infra	%	17%	22%	17%	4%	3%	2%	9%	4%	3%	0%	10%	1%	94,0%	100%
Provisional 2007	vol.	15,2	18,5	15,1	3,5	3,5	2,2	9,7	4,2	3,1	0,4	8,6	0,6	84,6	89,8
cf infra	%	17%	21%	17%	4%	4%	2%	11%	5%	3%	0%	10%	1%	94,0%	100%
Forecast 2008	vol.	13,6	17,2	16,5	3,6	3,1	1,9	10,0	4,5	4,1	0,4	7,9	*1,0*	83,8	89,1
cf infra	%	15%	19%	19%	4%	3%	2%	11%	5%	5%	0%	9%	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	**avg.81/85**	**avg.86/90**	**avg.91/95**	**avg.96/00**	**avg.01/05**	**Forecast 08**
5 leading EU exporters (Germany, Spain, Fr, Italy, Portugal)	75,6%	78,8%	75,5%	71,2%	65,1%	60,6%
"Southern hemisphere" (Arg, Chile, South Africa, Aus/NZ)+	1,6%	3,1%	8,0%	14,8%	23,3%	29,7%
CEE and Maghreb	14,1%	10,3%	5,1%	4,9%	3,1%	2,6%
Other countries	8,7%	7,8%	11,4%	9,0%	8,5%	7,1%

Data given, when not specified from national customs statistics & UNcomtrade. If the data is unavailable, information is obtained from OIV Experts, the press, to which
to which is added, on an EU level information from EU harvest statement

PECO, Magreb & Moldavia in 2008 : estim.direct except Morocco & Bul (QOIVstate conditions09) + QOIV Conj09 + data UbiFrance (at 9 months) for other countries except South Africa (SAWIS) and NZ (Nzwine)

94% correlation represents the share of world trade by country followed on avg in 2004-2007 and is carried over in 2008 to evaluate the world market.

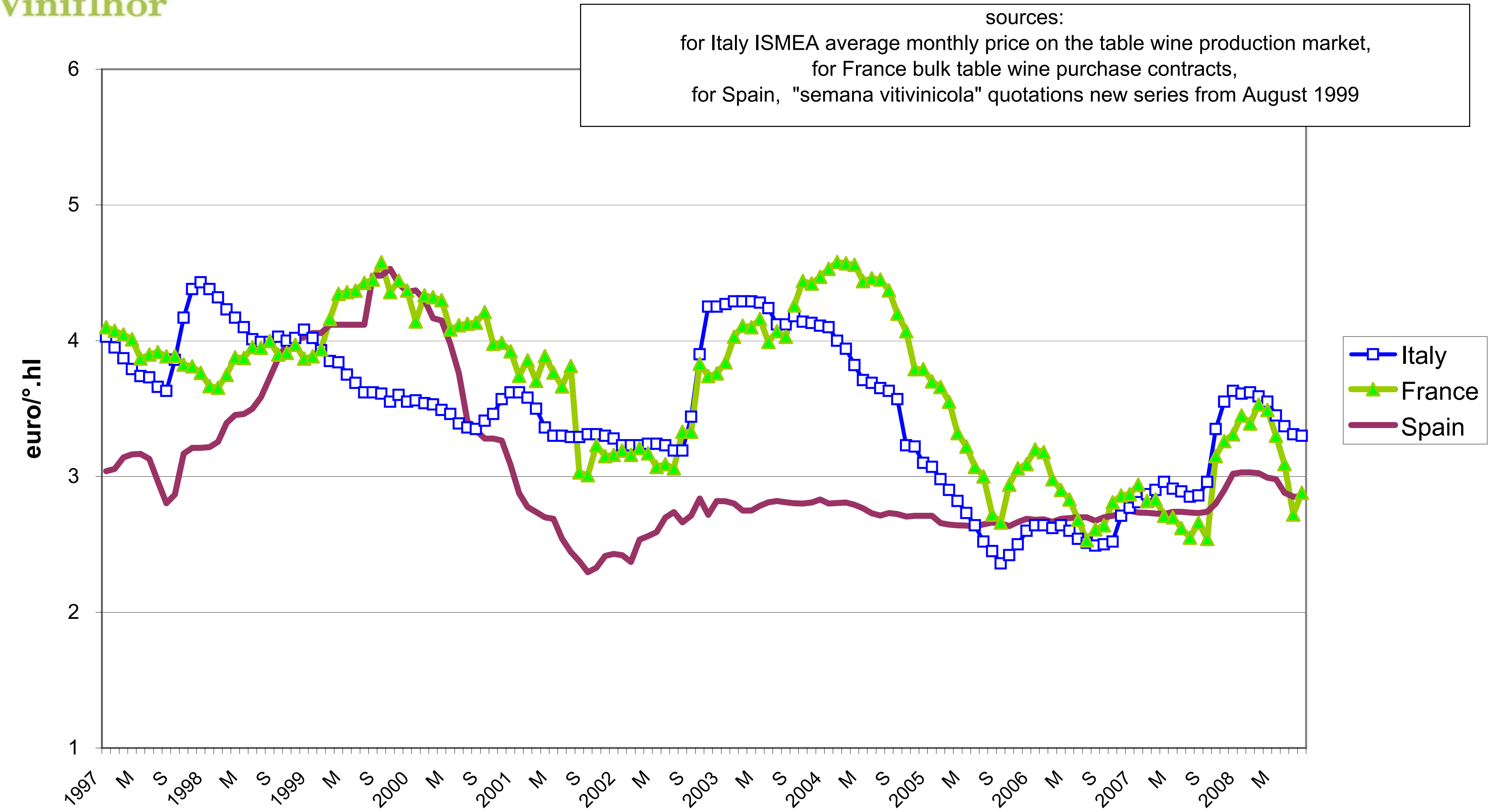
World Market

Table 10
Share of world trade in world wine consumption

in Mio hl	Definitive 2003	Definitive 2004	Definitive 2005	2006 to be published	Provisional 2007	Forecast 2008			2008 in middle of estimated mean	08/07 in%
I: World consumption of wine	236,9	239,5	239,2	242,7	244,9	237,1	à	248,7	242,9	-0,8%
II: World market (cf Tab.9)	72,5	76,9	79,7	84,6	89,8	89,1	à	89,1	89,1	-0,7%
II / I in %	30,6%	32,1%	33,3%	34,9%	36,7%	35,8%	à	37,6%	36,7%	0,1%

Viniflhor

Average price of red table wine with no geographical indication



Average monthly price for white table wine with no geographical indication