

The evolution of wine trade

Before and during the big crisis

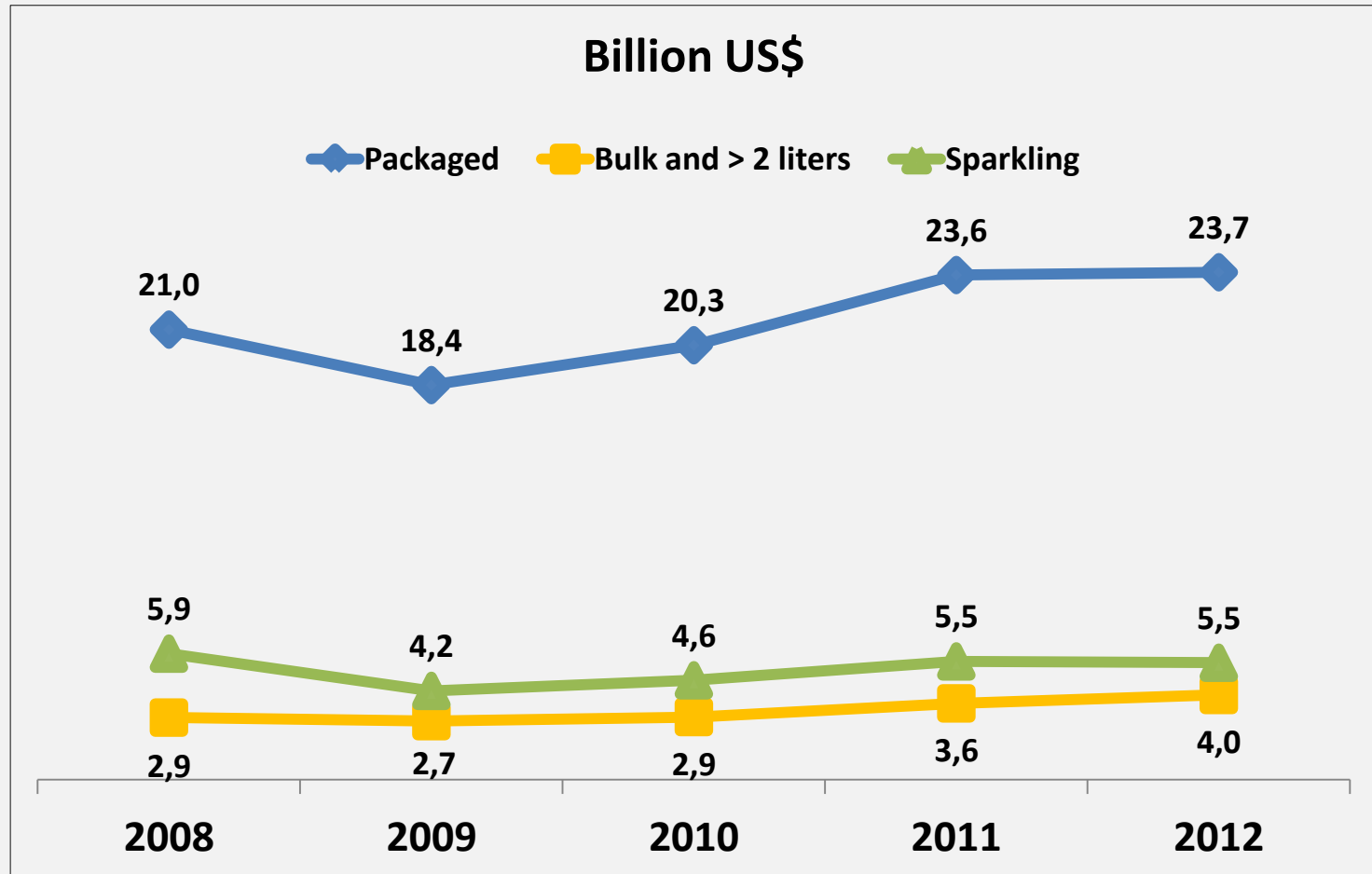
*Carlo Flamini, Corriere Vinicolo editor
Unione Italiana Vini*

Organo d'informazione dell'Unione Italiana Vini

IL CORRIERE VINICOLO

...dal 1928

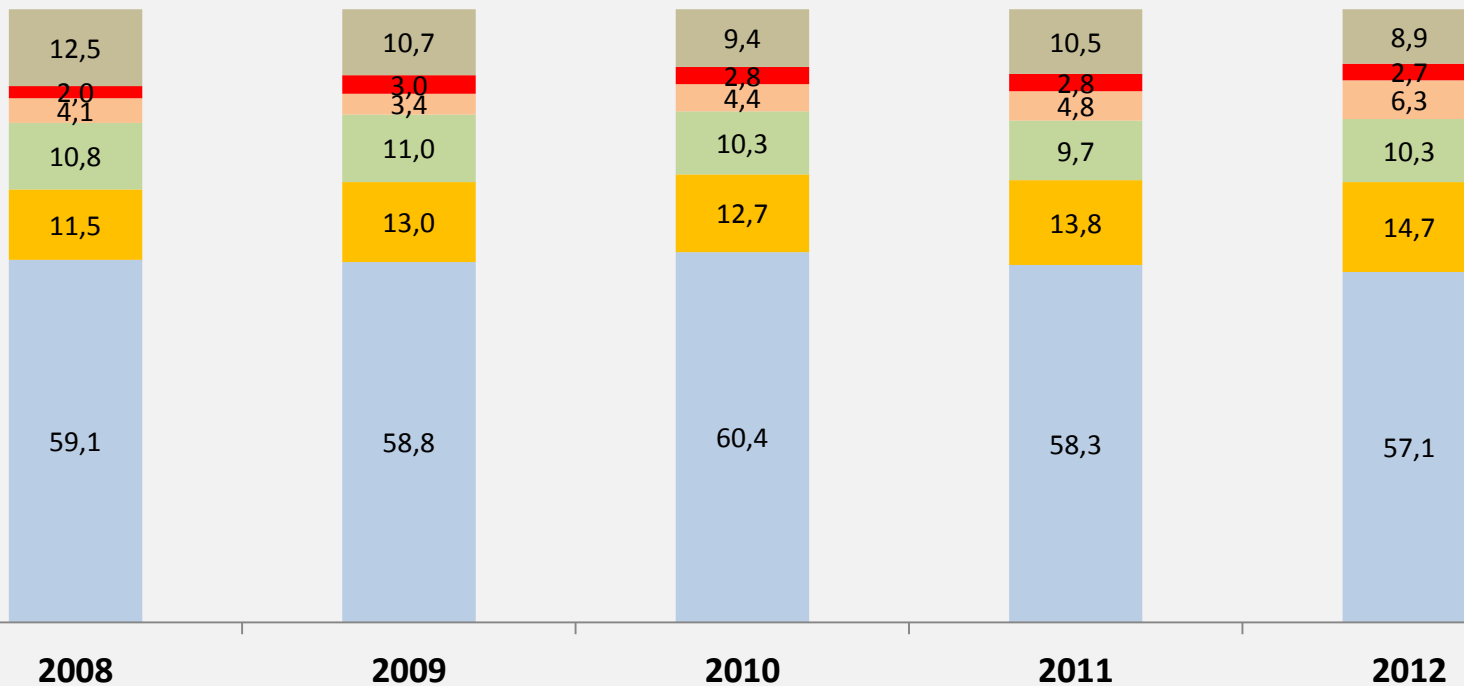
World wine trade at a glance



Sparkling wines

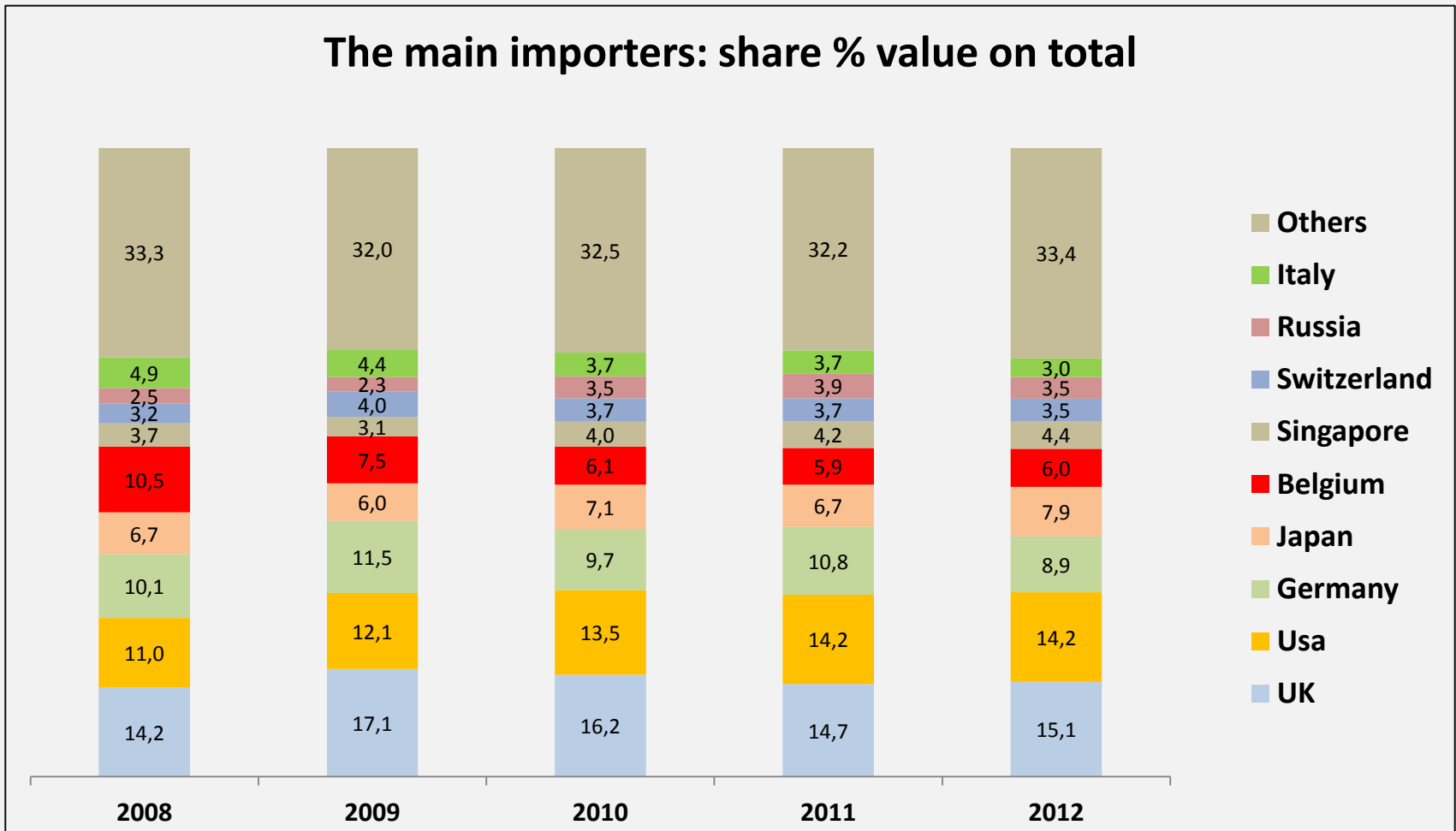
The main exporters: share % value on total

France Italy Spain Singapore Germany Others



Sparkling wines

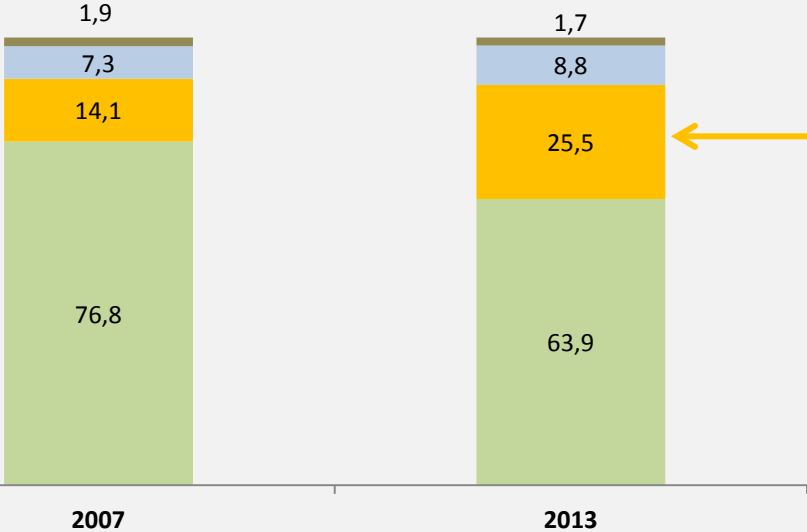
The main importers: share % value on total



Sparkling wines: what's happening in the key markets

USA

France Italy Spain Others

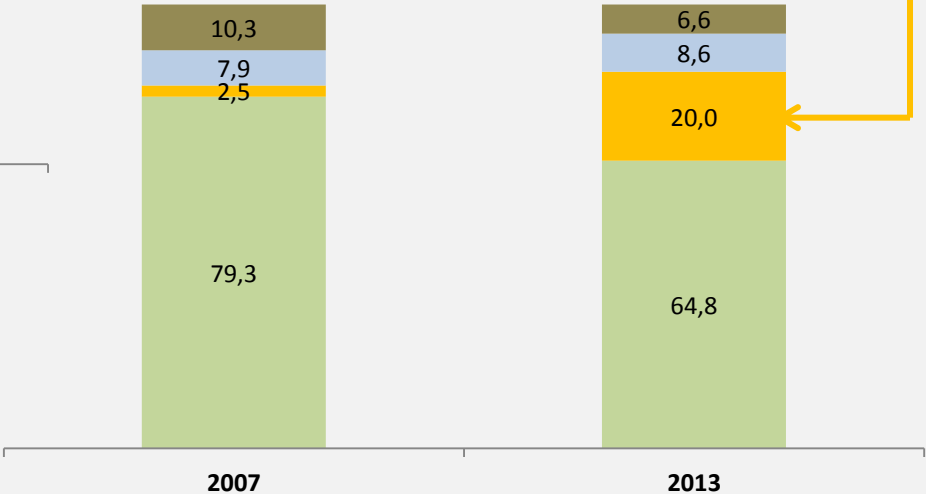


From now on: 2013 january-september

Prosecco big wave

United Kingdom

France Italy Spain Others

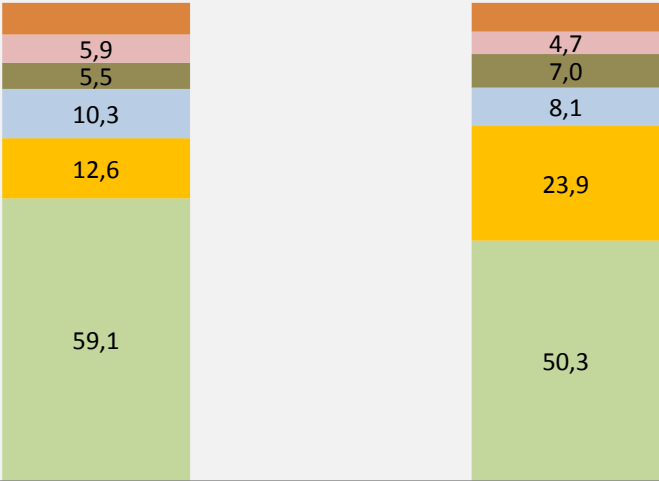


Sparkling wines: what's happening in the key markets

Prosecco big wave again

Canada

France Italy Spain Usa Germany Others

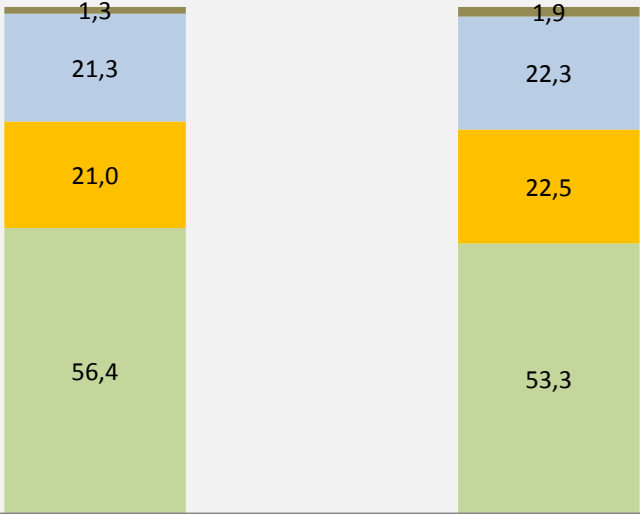


2007

2013

Germany

France Italy Spain Others



2007

2013

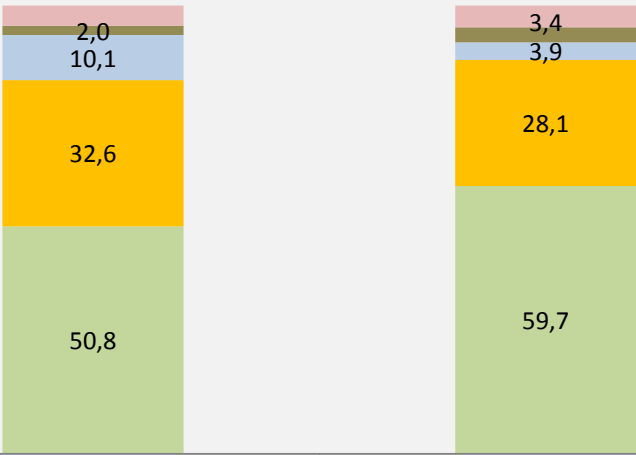
Germans are saving money

Sparkling wines: what's happening in the key markets

The return of Asti

Russia

Italy France Ukraine Spain Others

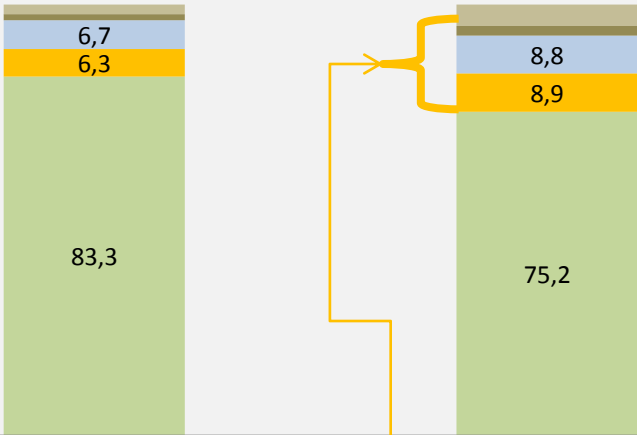


2007

2013

Japan

France Spain Italy Australia Others



2007

2013

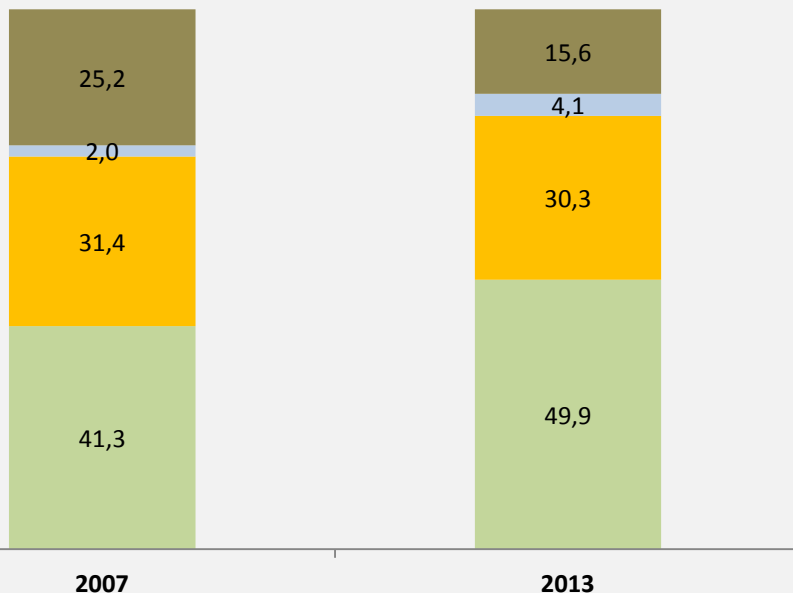
Japanese saving money with Italian sparkling and Cava

Sparkling wines: what's happening in the emerging markets

**In Hong Kong
the re-export effect
from Singapore keeps
France at the top**

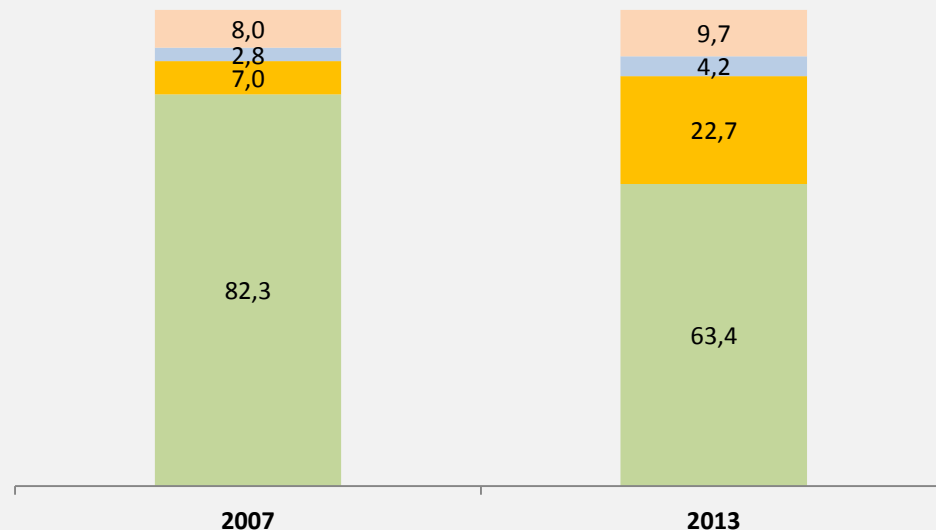
Hong Kong

■ Singapore ■ France ■ Italy ■ Others



China

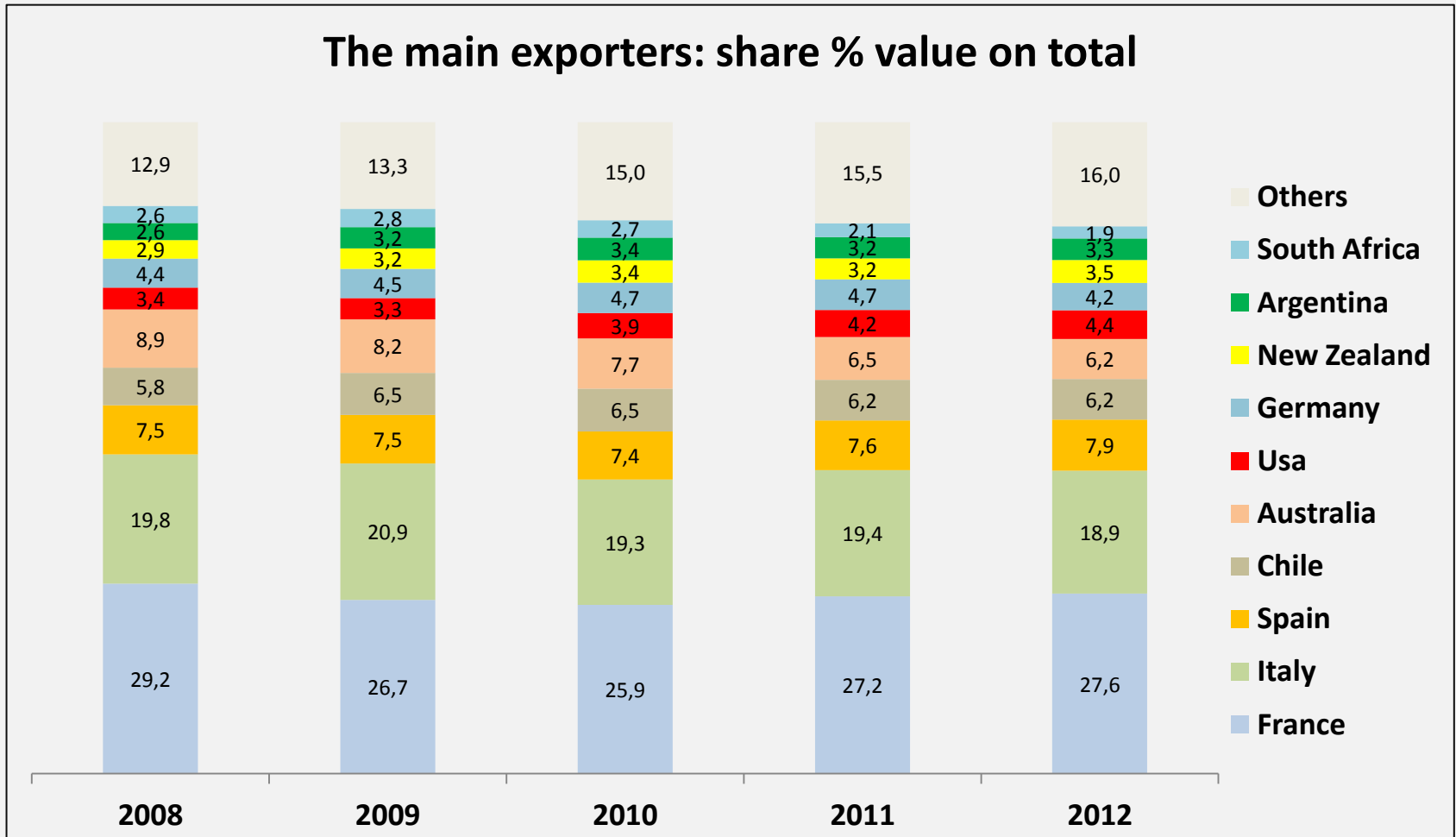
■ France ■ Italy ■ Spain ■ Others



**Chinese are
discovering
something new
(and cheaper)**

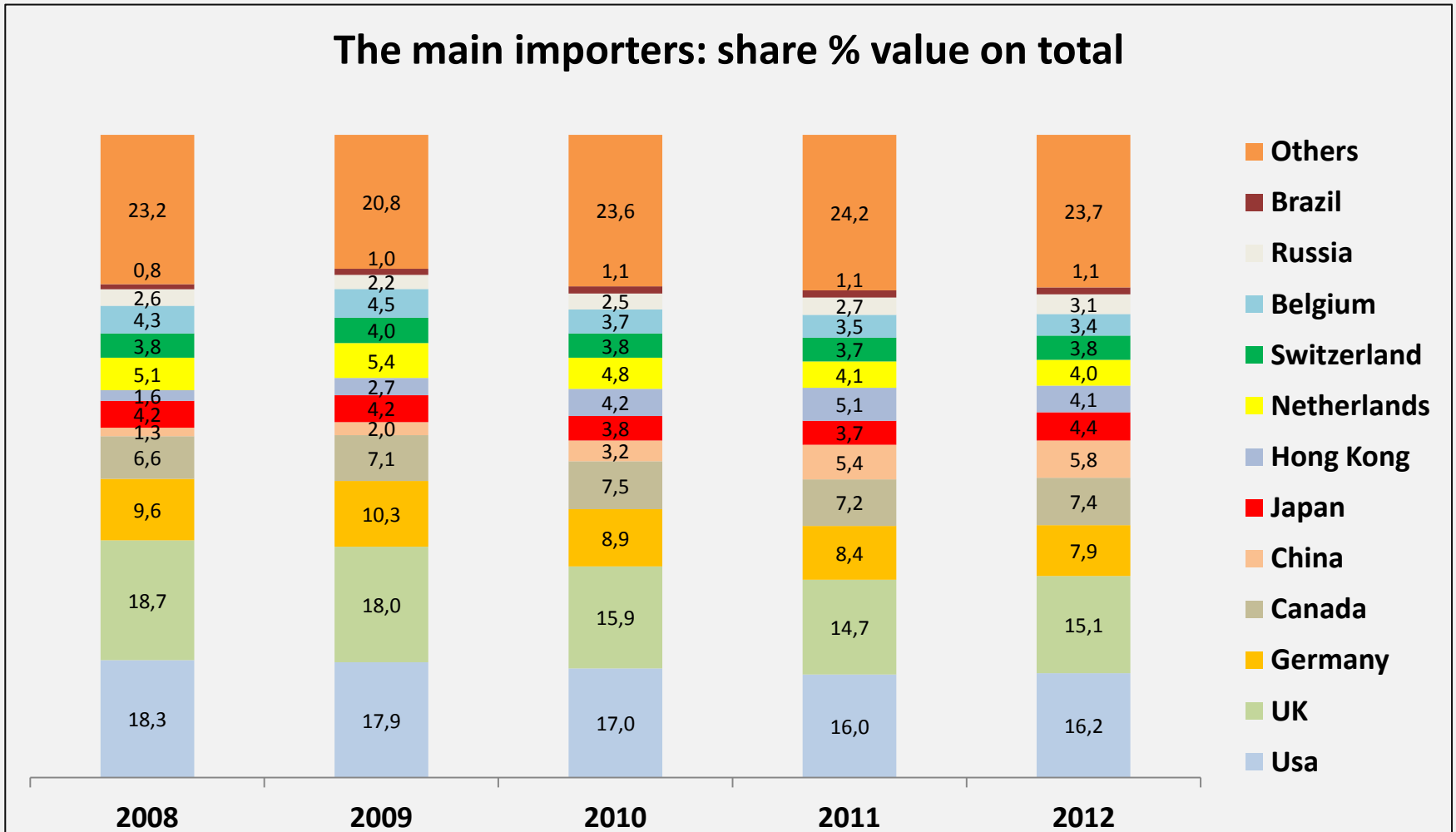
Packaged wines

The main exporters: share % value on total



Packaged wines

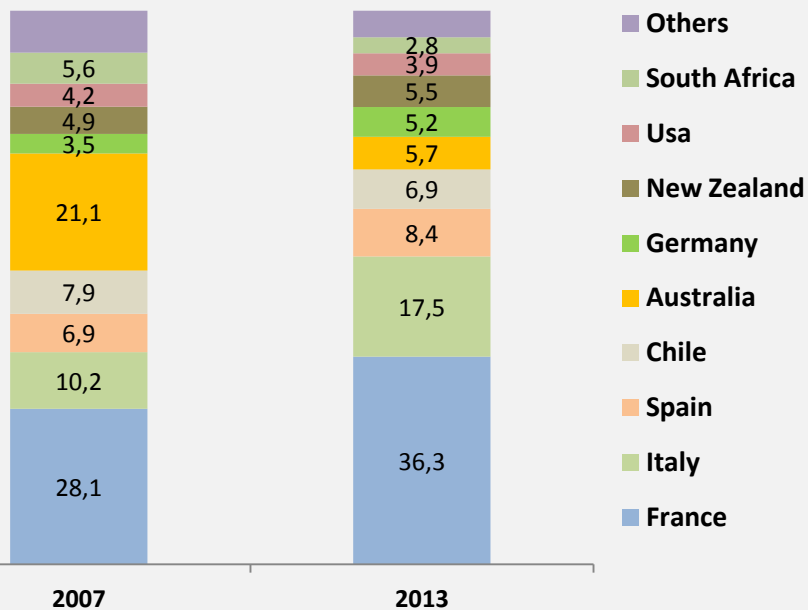
The main importers: share % value on total



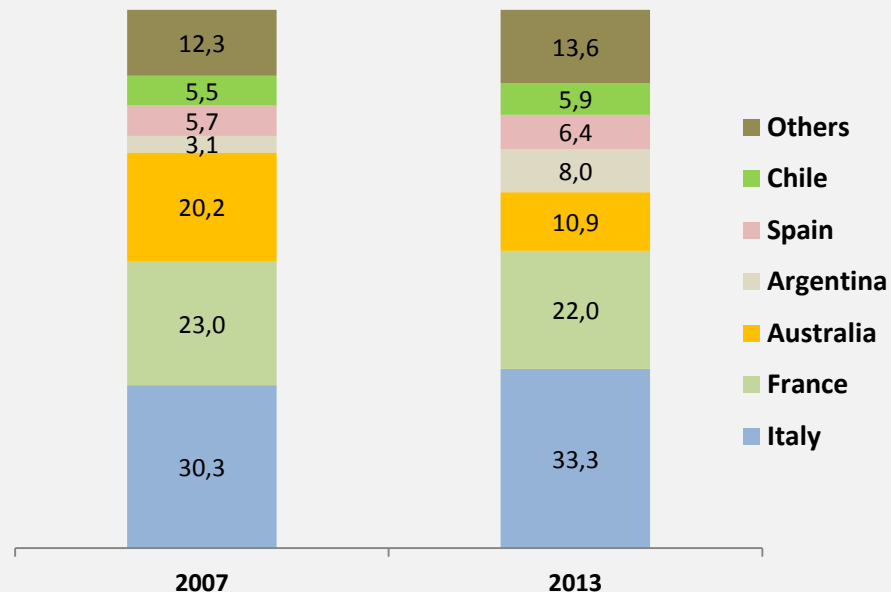
Packaged wines: what's happening in the key markets

The Australian switch to bulk opens space for the return of France and Italy...

United Kingdom



USA

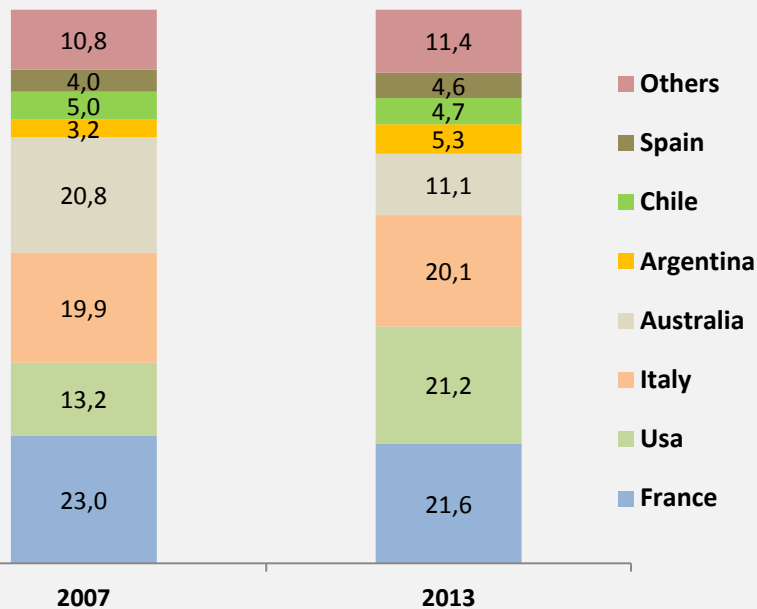


... but Aussie are still alive...

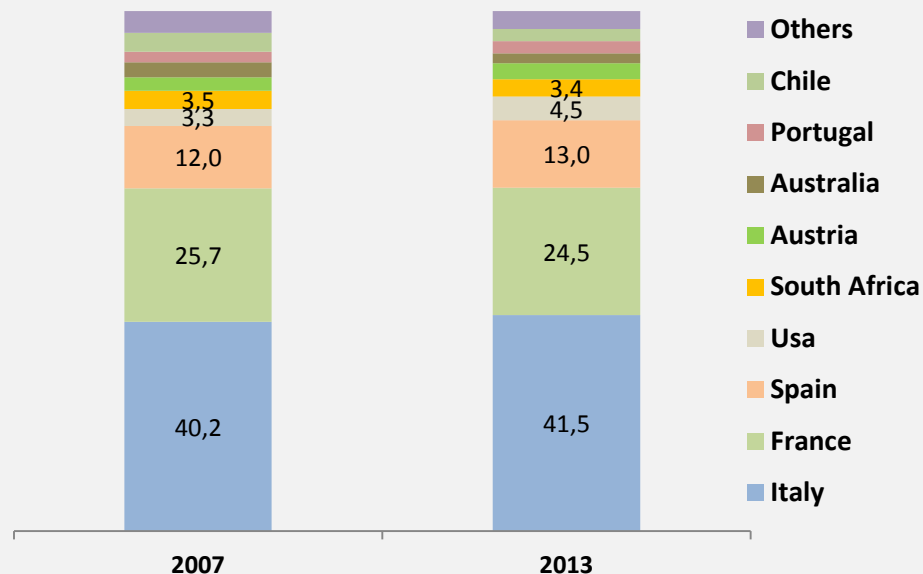
Packaged wines: what's happening in the key markets

Canada: less France, US wines take the place of Australians. Some curiosity for Argentina, but nothing more

Canada



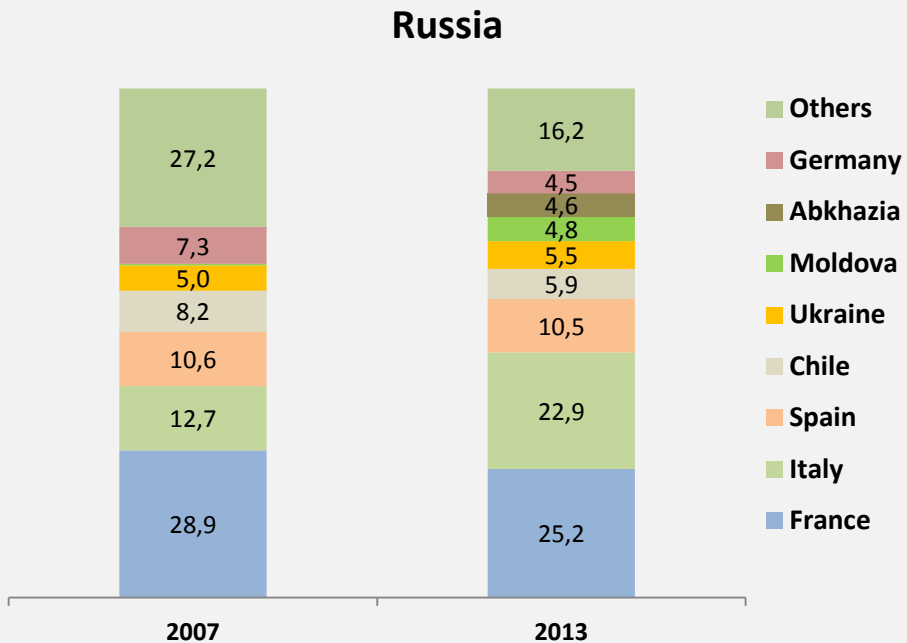
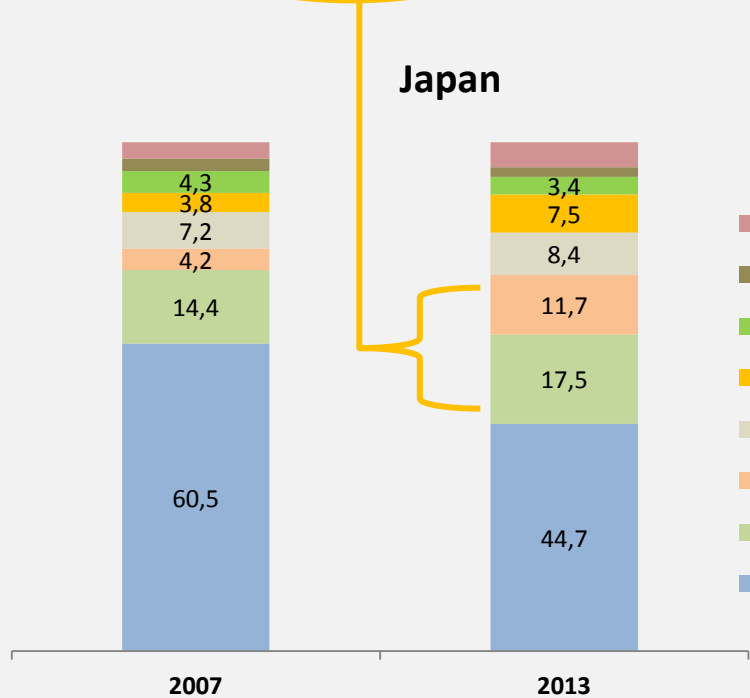
Germany



As for sparkling, Italy and Spain are gaining market share on France

Packaged wines: what's happening in the key markets

As for sparkling, Japanese are switching to cheaper wines: Italians and Chileans coming first, but even Spain...

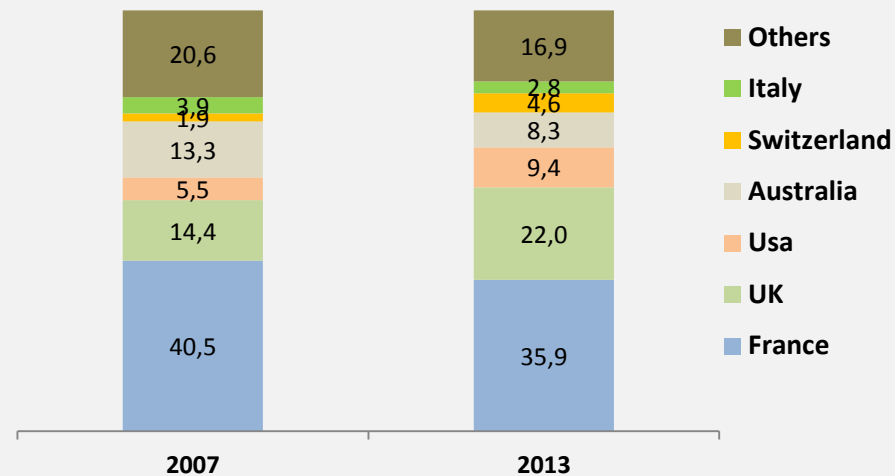


Economic crisis is impacting Russians' wallets: less France, more Italian wines. And now the borders are open to Moldova and Georgia again...

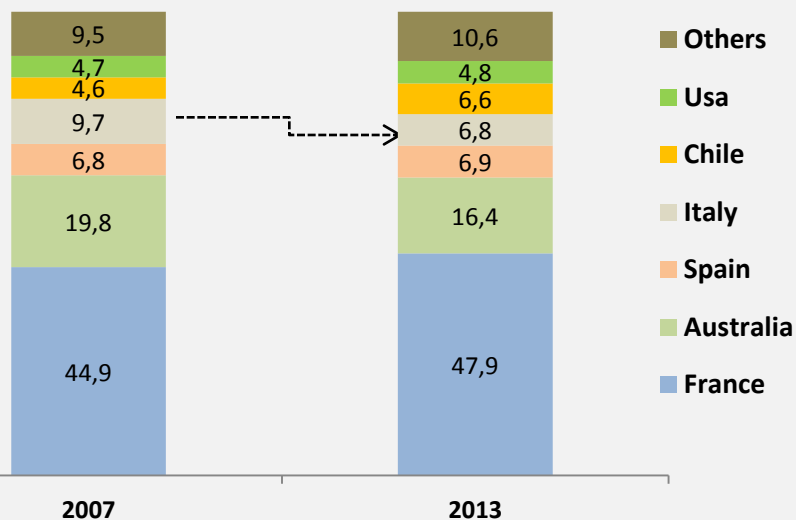
Packaged wines: what's happening in the emerging markets

A revolution happened in China: Italy fell down, replaced by Chileans in 2012 and – recently – by Spain. It's the sobriety age...

Hong Kong



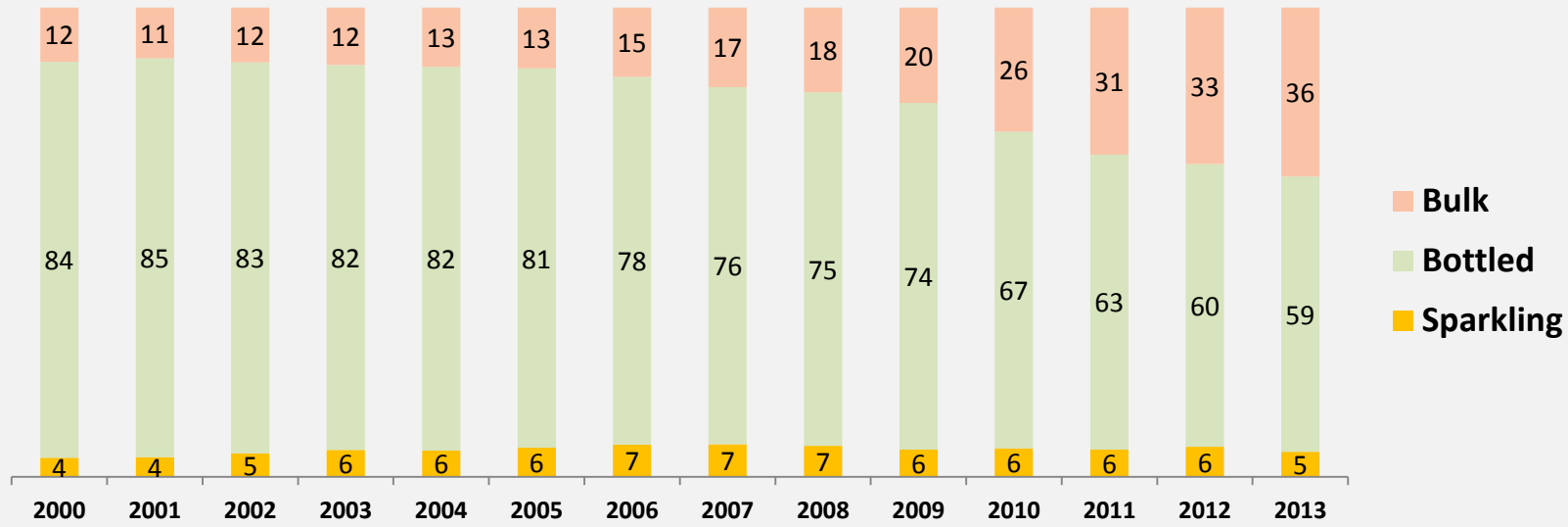
China



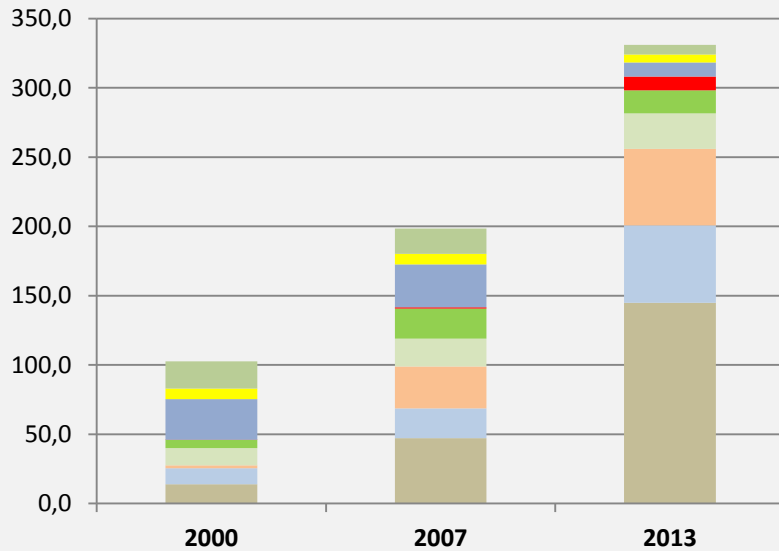
Hong Kong remains an Eldorado for superpremium wines: France (and re-export from UK), US, Australia, Switzerland... No country for Italian producers

Bulk wines: what's happening in UK

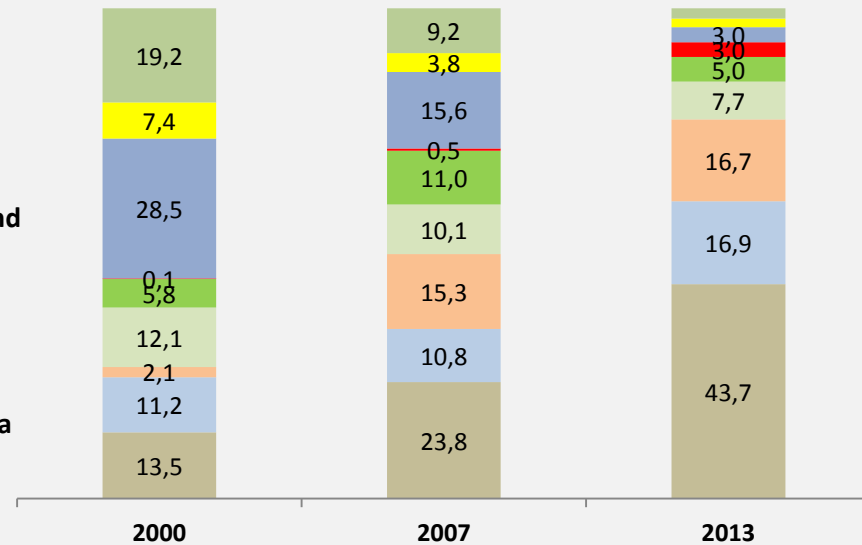
Wine import by type (share % volume)



Million liters

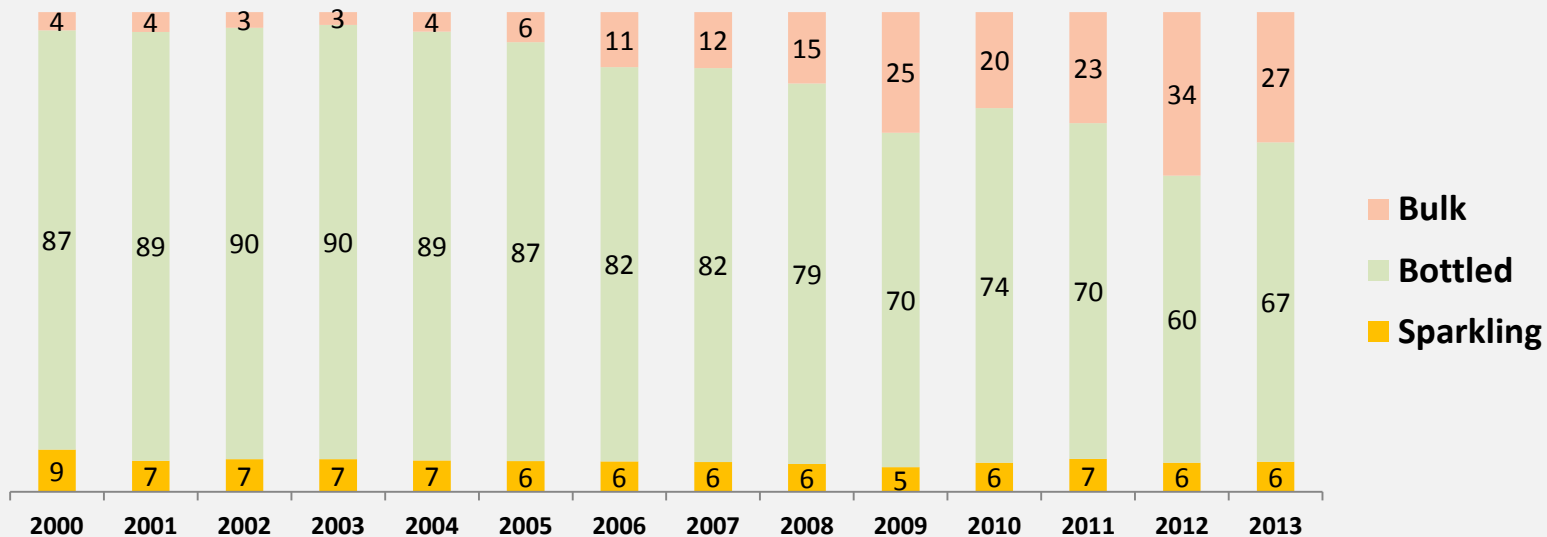


Share % volume

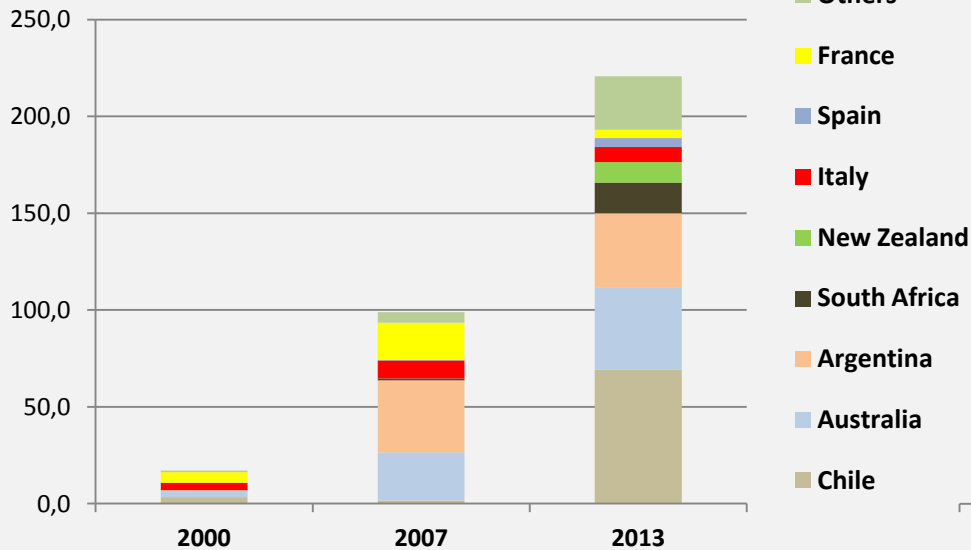


Bulk wines: what's happening in US

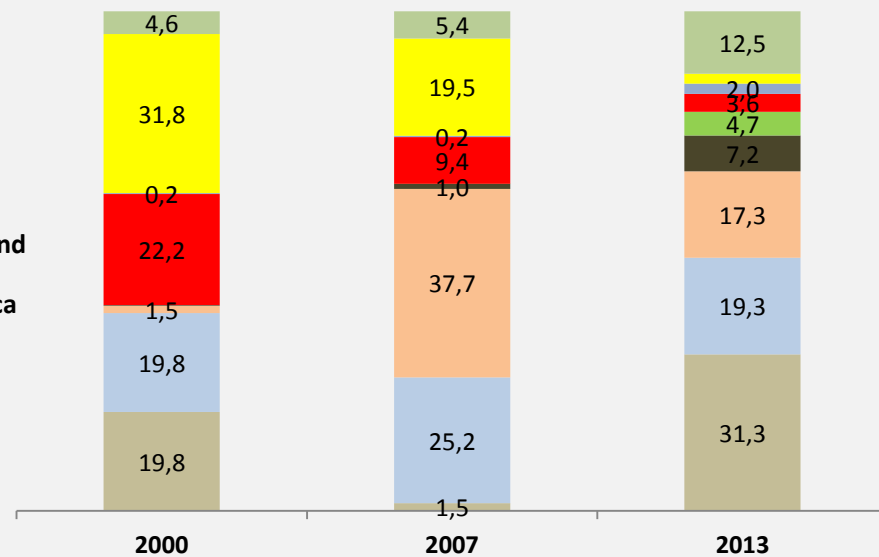
Wine import by type (share % volume)



Million liters



Share % volume



Do you want to get quarterly updates on international wine markets?

WINE BY NUMBERS

A PROJECT BY IL CORRIERE VINICOLO

UNIONE ITALIANA VINI / ASSOCIATION FOR THE GENERAL CONSERVATION OF THE ACTIVITIES OF THE WINE INDUSTRY ECONOMIC CYCLE

IMPORT / january-june

BOTTLED	Thousand liters		
	2012	2013	% change
USA	337.659	361.759	7,1
UK	361.180	347.895	-3,7
Germany	287.394	269.045	-6,4
China	116.304	140.592	20,9
Canada	121.673	126.992	4,4
Russia	120.192	94.064	-21,2
Japan	84.886	82.130	-3,2
Switzerland	47.787	48.415	1,3
Brazil	29.966	28.771	-4,0
Hong Kong	24.020	24.208	0,8
South Korea	10.076	12.478	23,8

SPARKLING	Thousand liters		
	2012	2013	% change
USA	27.874	30.457	9,3
UK	31.835	29.931	-6,0
Germany	31.506	28.997	-8,0
Japan	11.192	12.134	8,4
Russia	7.137	9.490	33,0
Switzerland	6.097	6.034	-1,4
Canada	4.150	4.366	5,2
China	2.446	3.884	58,8
Brazil	1.493	1.461	-2,2
South Korea	1.114	1.415	27,0
Hong Kong	929	1.028	10,6

BULK	Thousand liters		
	2012	2013	% change
Germany	453.381	466.412	2,9
UK	200.576	202.088	0,8
USA	399.434	154.299	-22,6
Russia	98.570	72.049	-26,9
Canada	56.175	50.023	-11,0



The very latest data of the main exporter and importer countries: Italy, France, Spain, Argentina, Chile, Australia, New Zealand, South Africa, USA, Canada, UK, Germany, Switzerland, Russia, China, Hong Kong, Brazil, Japan, South Korea. The data are exposed with details on packaged wines, bulk and sparkling, showed in volume, value and average price

EXPORT / january-june

BOTTLED	Thousand liters		
	2012	2013	% change
Italy	581.910	565.453	-2,8
France	487.932	488.641	0,1
Spain	420.975	382.021	-9,3
Chile	205.729	202.708	-1,5
Australia	157.526	152.746	-3,0

SPARKLING	Thousand liters		
	2012	2013	% change
Italy	58.200	60.440	3,9
France	48.700	48.800	0,2
Spain	42.000	38.000	-9,5
Chile	20.000	19.500	-2,5
Australia	15.000	14.500	-3,3

BULK	Thousand liters		
	2012	2013	% change
Spain	587.496	434.447	-26,1
Italy	321.037	299.562	-6,7
Chile	121.779	234.875	92,9
South Africa	114.489	191.458	67,2
Australia	186.604	173.485	-7,0

JANUARY-JUNE / asia

Source: Chinese Customs

LITERS	2013		2012		2011	
	% change	2013	% change	2012	% change	2011
2013	18,9	2.034.476.520	32,3	3.074	28,3	
21.067	20,1	757.908.186	33,2	42.53	10,9	
44.456	40,3	303.028.560	40,6	18.88	0,2	
70.123	25,6	287.526.066	24,6	25,1	-0,7	
76.807	6,8	268.204.675	23,3	27,30	15,4	
24.620	5,2	237.880.775	25,1	38,07	32,0	
29.306	8,7	81.026.153	108,6	33,28	14,8	
89.668	16,8	75.545.583	47,3	32,57	26,1	
37.265	32,1	60.355.972	40,1	32,86	6,0	
70.097	32,8	264.542.238	40,4	37,16	5,7	
303.172	20,9	4.850.404.758	7,6	30,01	-10,0	

SPARKLING	LITERS		YUAN		YUAN/LITER	
	2013	% change	2013	% change	2013	% change
France	989.584	12,0	94.075.013	-39,1	95,98	27,8
Italy	1.861.448	128,1	43.270.372	128,6	23,25	0,2
Spain	37.594	12,4	8.677.318	47,2	23,20	-20,9
Australia	140.573	-36,5	5.137,75	32,7	36,56	5,9
Germany	173.786	32,4	4.150.557	39,1	23,93	5,1
USA	78.711	18,5	1.905.585	-46,9	10,00	34,9
Others	265.667	121,0	5.807.607	79,1	21,86	18,0
Total	3.863.715	58,8	163.521.577	3,3	42,10	-34,9



Source: Korean International Trade Association

LITERS	2013		2012		2011	
	% change	2013	% change	2012	% change	2011
2013	16,3	18.205	21,9	4.84	5,1	
22.266	47,9	20.970	27,1	10,53	-34,1	
23.320	16,3	18.205	21,9	4.84	5,1	
50.178	17,0	10.388	24,7	6,26	6,6	
30.656	22,7	9.025	29,0	5,50	5,2	
61.441	34,6	4.609	48,3	2,49	10,2	
8.376	-13,3	3.947	-1,7	7,07	13,4	
12.390	23,9	1.999	24,9	5,29	0,8	
7.580	-3,4	1.130	-4,7	4,56	-1,3	
0.030	30,4	730	30,4	8,58	-0,1	
0.044	0,6	392	3,5	3,96	17,9	
7.840	102,6	277	34,5	21,57	33,6	
7.597	411,7	880	113,6	3,18	-58,3	
67746	73,1	72322	24,8	57,8	0,8	

SPARKLING	LITERS		YUAN		YUAN/LITER	
	2013	% change	2013	% change	2013	% change
France	176.438	8,9	47,58	22,9	26,97	12,0
Italy	633.642	7,0	3.158	17,4	4,98	9,8
South Africa	303.880	131,3	832	308,0	2,11	-2,4
Spain	90.528	8,3	348	27,0	3,84	17,3
USA	70.837	238,9	276	86,0	3,90	44,2
Australia	16.078	-55,7	119	-49,0	7,34	-10,9
Germany	22.275	46,39	137	53,9	5,15	5,3
Others	30.554	-39,8	70	-77,1	6,63	21,1
Total	2.415.822	27,0	9.168	24,5	6,84	8,0



Source: Hong Kong Customs

LITERS	2013		2012		2011	
	% change	2013	% change	2012	% change	2011
2013	-0,8	1.283.650	-30,3	179,71	-9,6	
71.087	-6,0	867.651	7,8	120,18	14,7	
440.174	7,6	379.024	-20,0	110,15	-26,6	
137.743	0,4	341.955	29,4	84,69	28,0	
25.338	-24,1	203.463	45,7	57,73	92,3	
27.1983	1,5	101.109	-5,6	79,39	7,0	
813.939	50,5	93.522	-49,2	105,79	-68,2	
334.362	7,4	76.287	-1,6	120,30	-8,4	
813.212	-2,4	62.201	-3,5	34,30	-1,2	
218.627	30,2	60.449	47,3	33,03	11,4	
46.538	-74,1	56.384	-6,3	384,77	29,3	
213.005	-2,4	40.925	-0,6	82,78	1,9	
46.561	-17,4	28.164	30,0	67,61	50,8	
27.040	36,5	11.224	24,2	49,44	-9,0	
35.095	-81,5	57,38	-45,4	37,98	12,6	
220.793	11,9	208.668	19,9	23,65	6,0	
109.267	0,8	3.630.204	-4,3	154,22	-5,1	

SPARKLING	LITERS		THOUSAND DOLLARS		DOLLARS/LITER	
	2013	% change	2013	% change	2013	% change
Singapore	236.930	-3,0	94.690	4,2	40,35	7,4
France	308.300	36,1	61.773	36,7	200,36	1,2
UK	356.474	-4,1	8.604	-6,4	24,14	-2,4
UK	36.508	82,6	7.053	26,7	192,72	-30,6
Australia	71.007	-8,0	5.302	-13,1	74,66	-5,6
USA	62.688	77,7	4.719	6,0	75,28	40,3
Spain	60.044	88,3	1.709	53,8	28,46	18,3
Germany	34.025	-49,0	1.475	-60,6	105,07	-22,7
Others	84.275	19,0	1.048	38,0	131,19	1,3
Total	1.028.301	10,6	196.366	9,3	190,96	-1,3



Source: Japanese Statistics Department

LITERS	2013		2012		2011	
	% change	2013	% change	2012	% change	2011
2013	18,9	2.034.476.520	32,3	3.074	28,3	

Free download our international magazine
www.winebynumbers.it