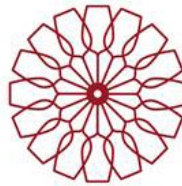


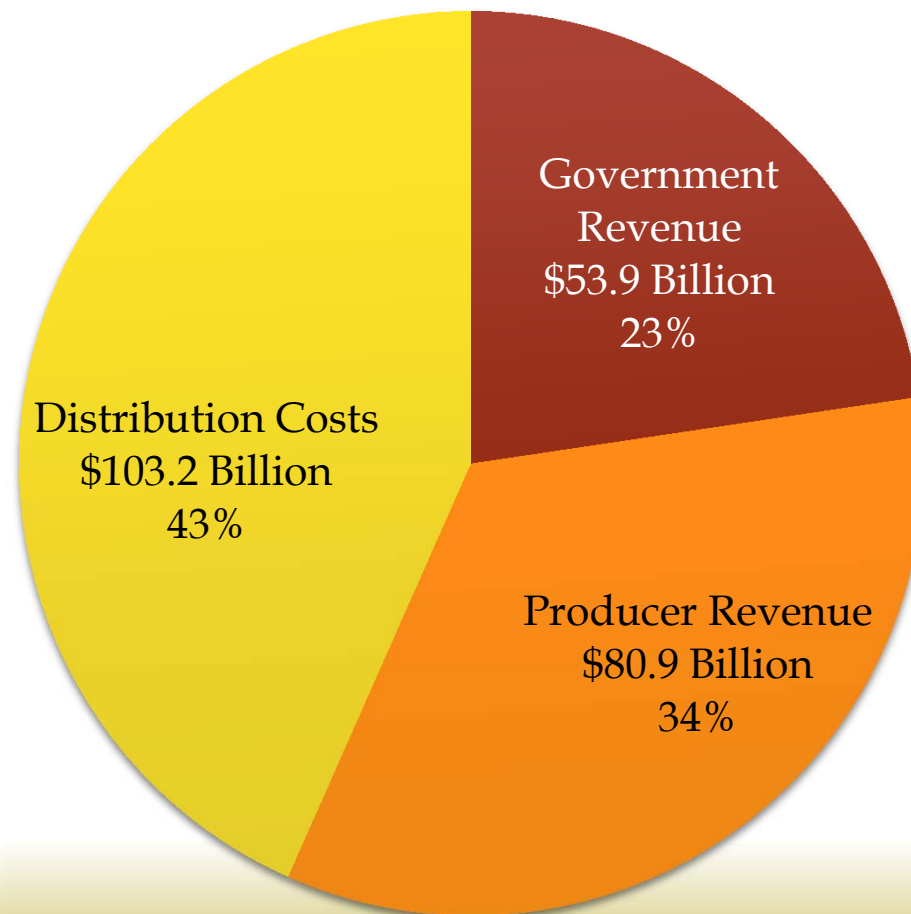
WORLD AND WWTG WINEGROWING REPORT



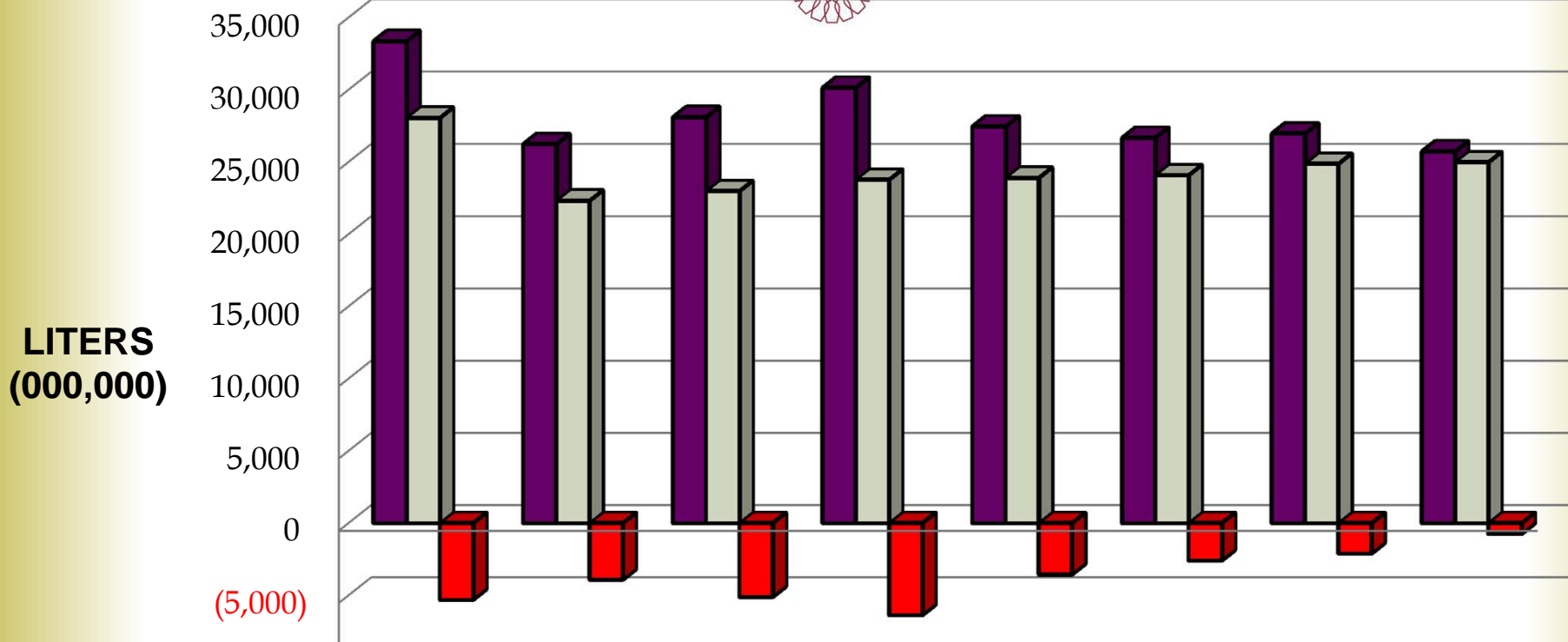
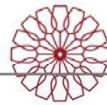
World Wine Trade Group
2013 Annual Meeting
November 7, 2013
Washington, D.C.

WORLD CONSUMER VALUE OF WINE

US\$ 238.0 BILLION (2012)



WORLD WINE PRODUCTION, CONSUMPTION AND SURPLUS 1981-2012 ¹



	1981-85	1991-95	2000	2005	2009	2010	2011	2012
■ PRODUCTION	33,355	26,227	28,093	30,136	27,449	26,663	26,965	25,721
□ CONSUMPTION	28,047	22,311	22,970	23,760	23,893	24,068	24,862	24,967
■ SURPLUS	(5,307)	(3,916)	(5,123)	(6,376)	(3,556)	(2,595)	(2,103)	(754)

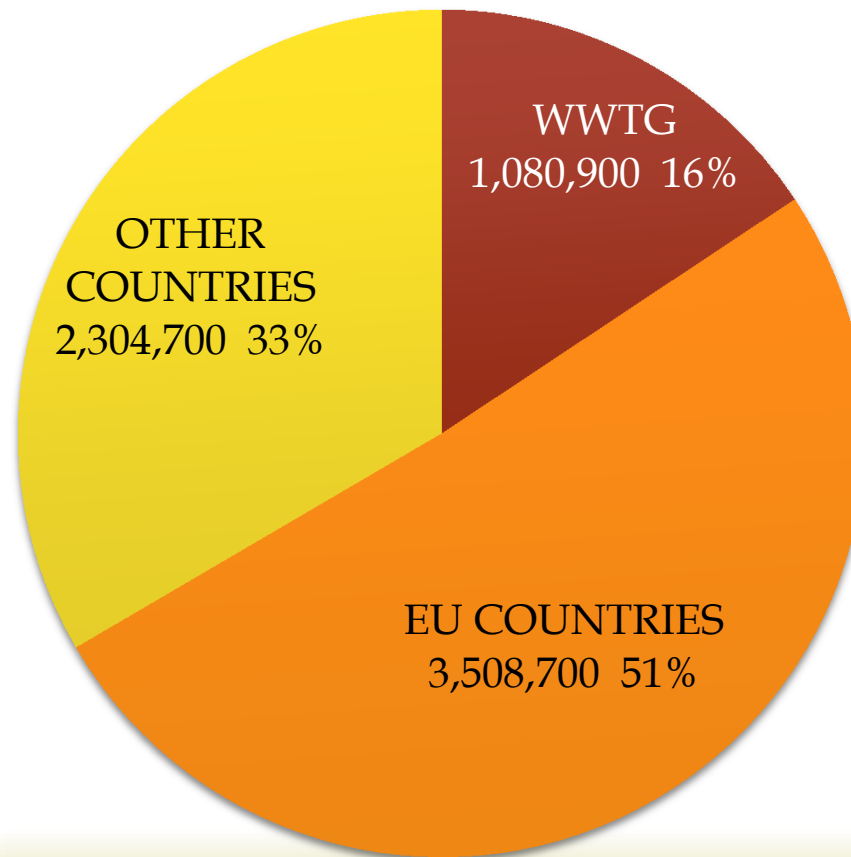
SHARP DECLINE OF WORLD WINE SURPLUS WAS THE HIGHLIGHT OF 2012



- ◆ The world wine surplus in 2005 was 6.4 Billion liters; the highest level in history.
- ◆ By 2011, the surplus had declined to 2.1 Billion liters.
- ◆ In 2012, the surplus declined to 754 Million liters.

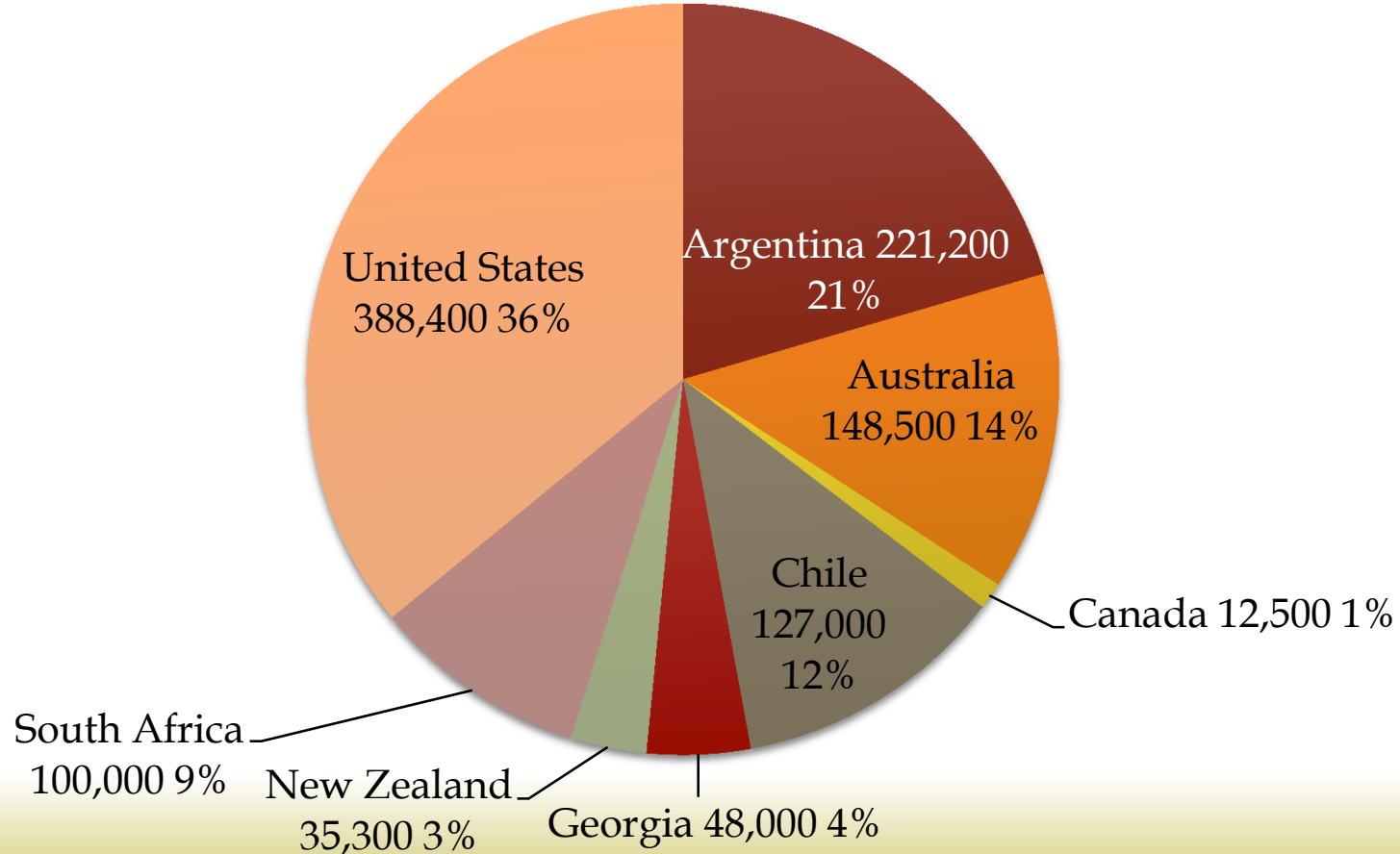
WORLD VINEYARD AREA - 2012

6,894,300 HECTARES (HA)



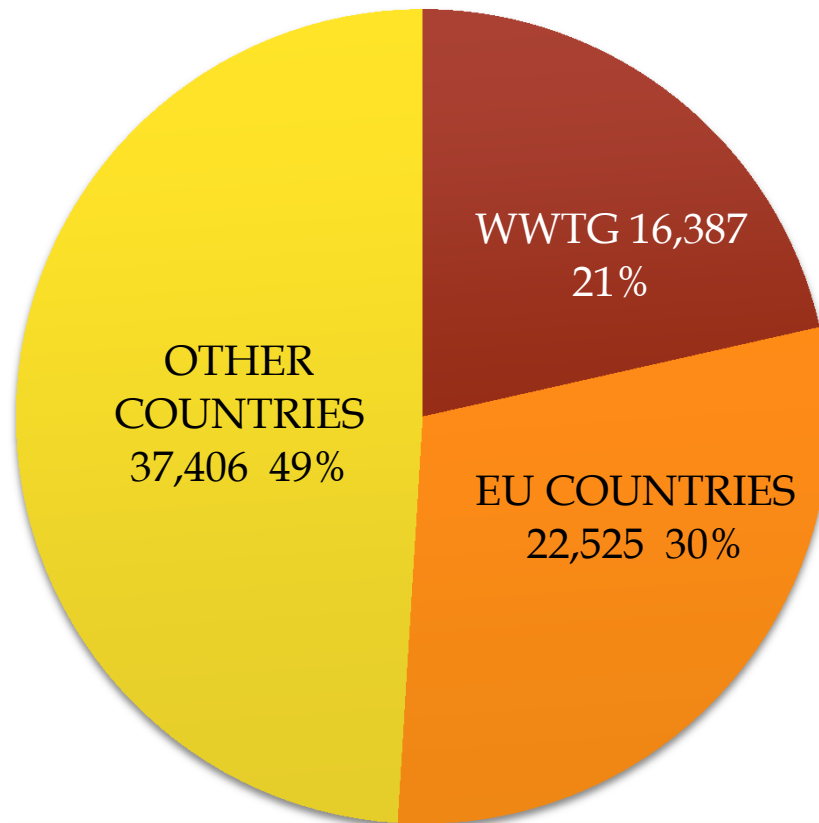
WWTG VINEYARD AREA - 2012

1,080,900 HECTARES (HA)



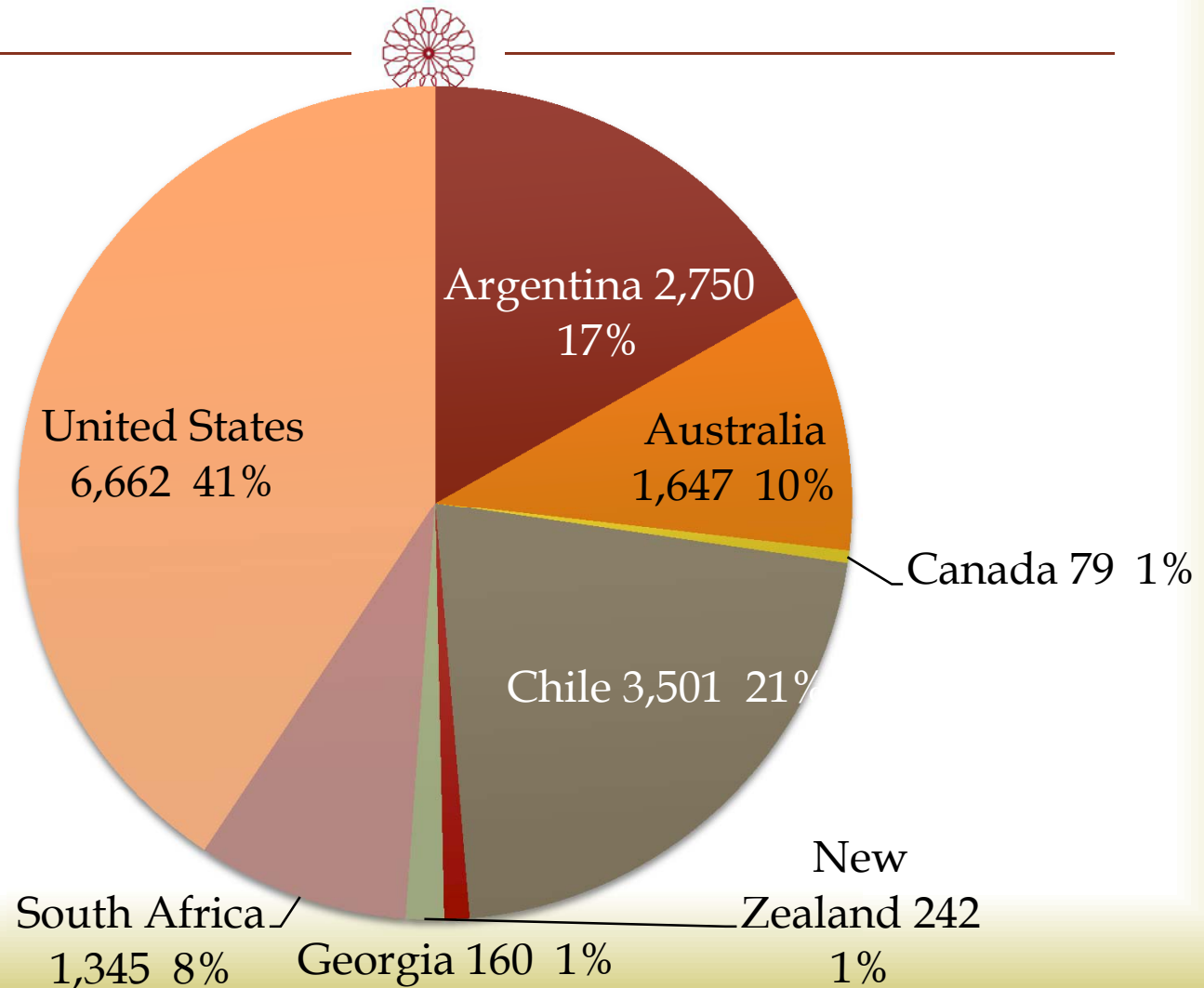
WORLD GRAPE PRODUCTION – 2012

76,318 METRIC TONS (000)



WWTG GRAPE PRODUCTION - 2012

16,387 METRIC TONS (000)



WORLD WINE PRODUCTION – 2012

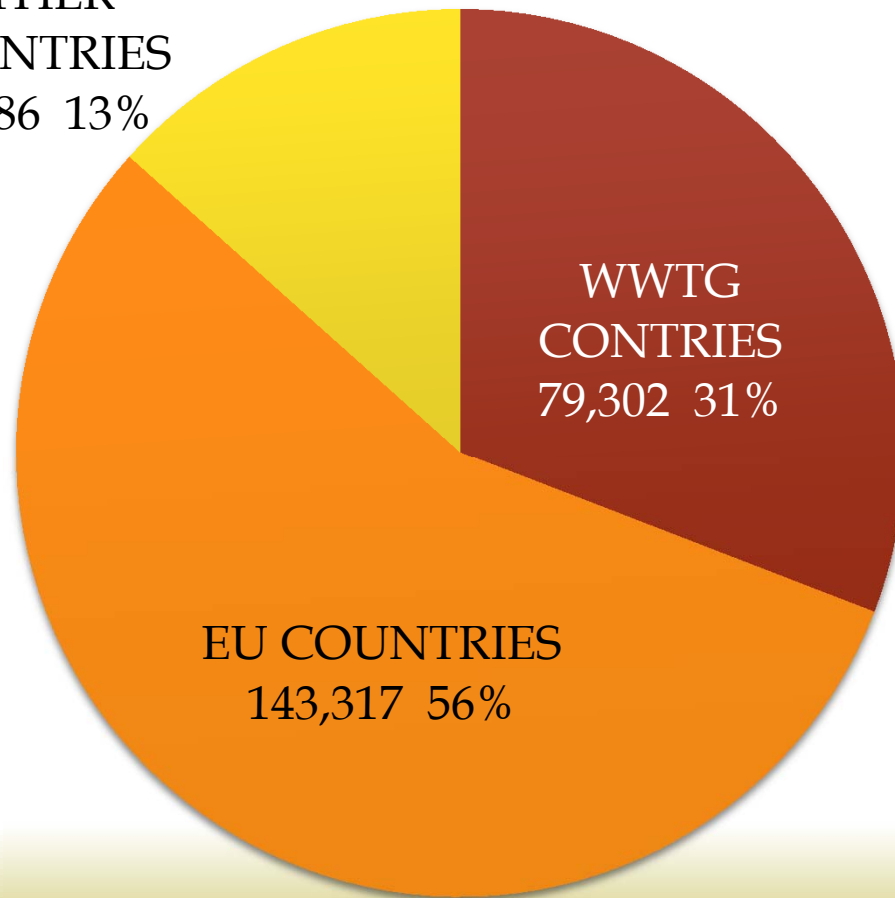
257,000 (HL 000)



OTHER
COUNTRIES
34,386 13%

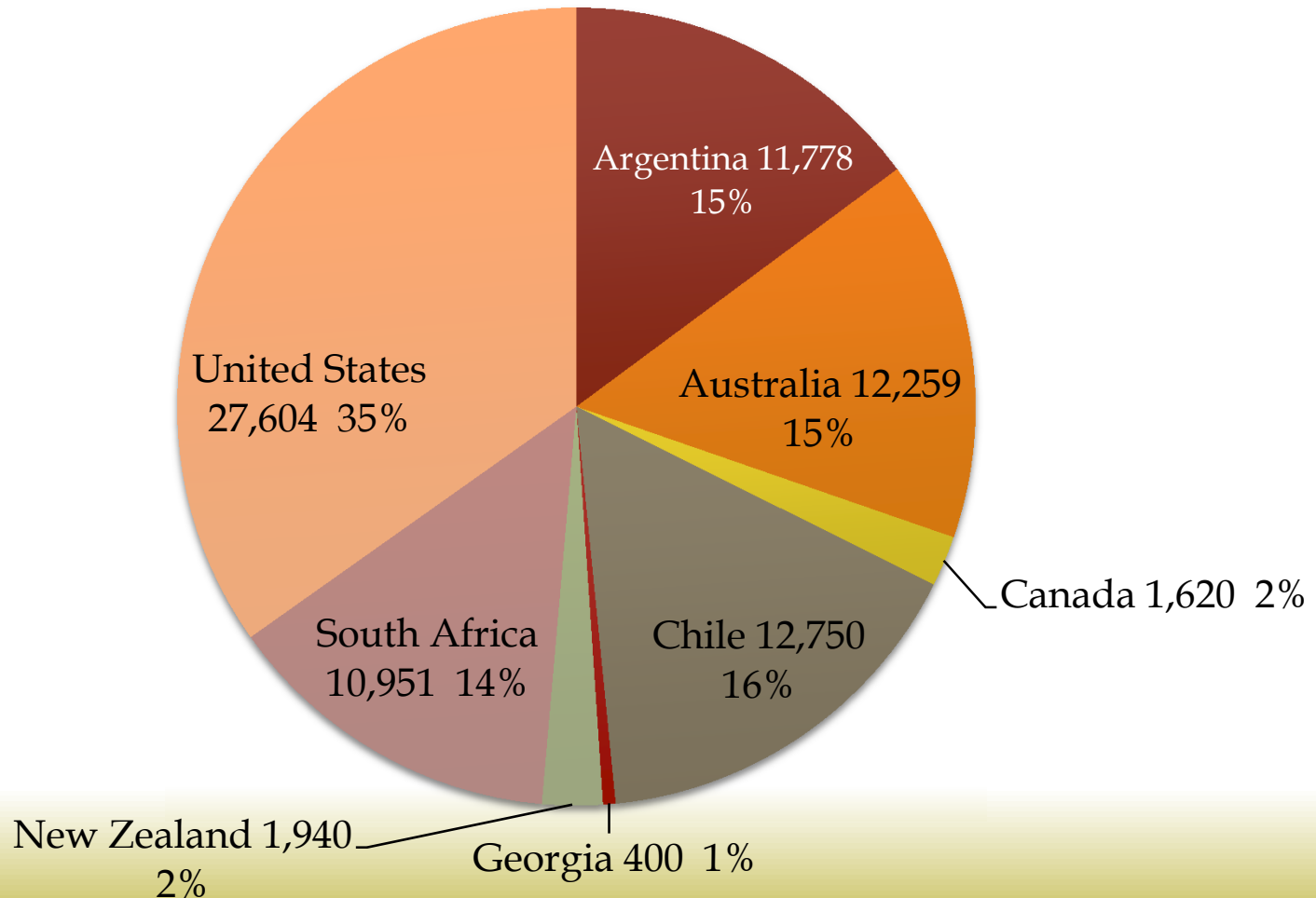
WWTG
CONTRIES
79,302 31%

EU COUNTRIES
143,317 56%



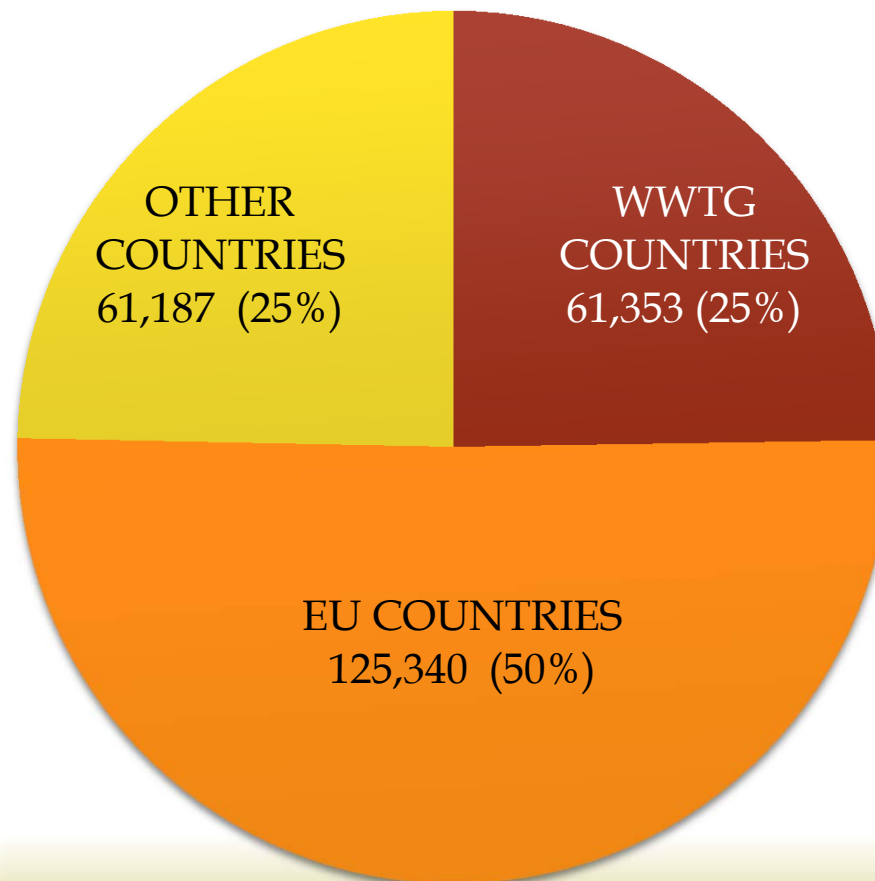
WWTG WINE PRODUCTION - 2012

79,302 (HL 000)



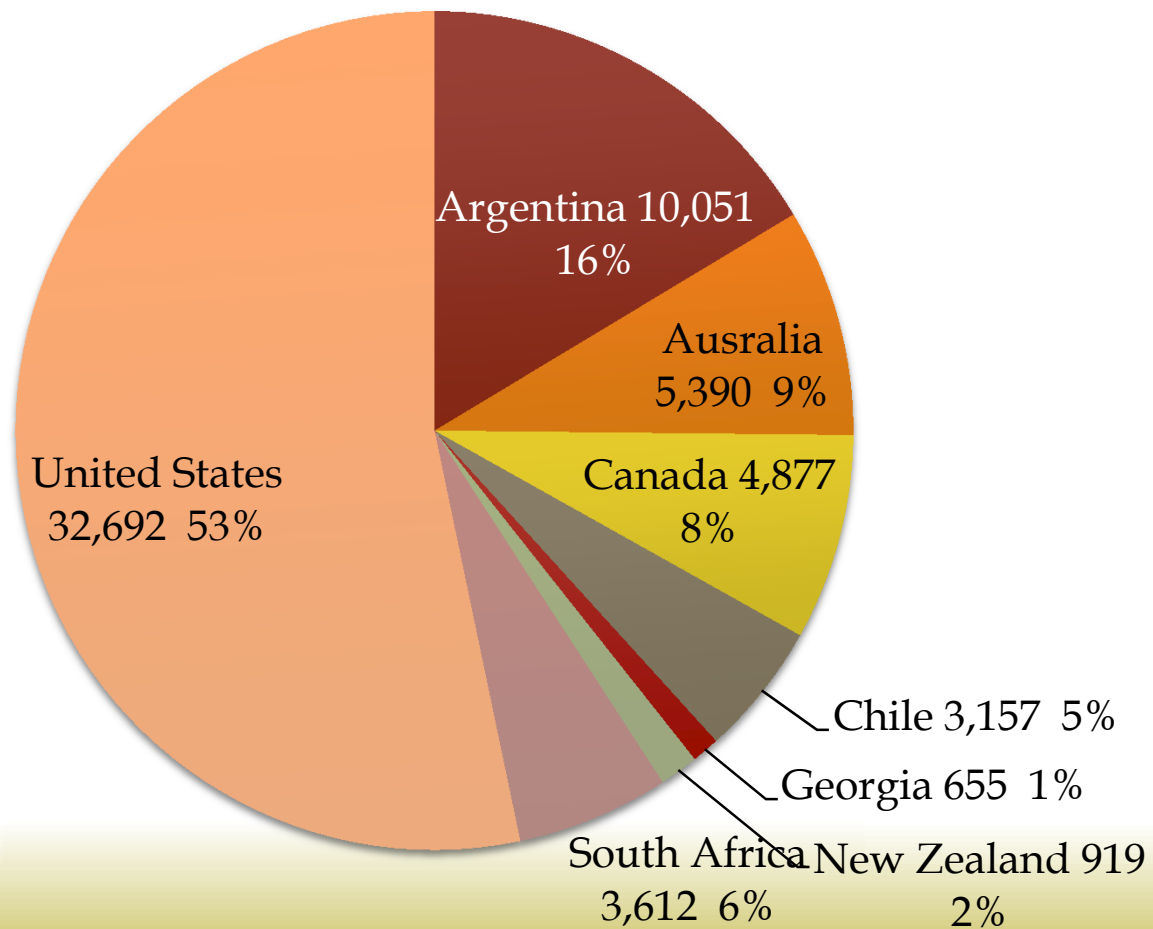
WORLD WINE CONSUMPTION - 2012

247,880 (HL 000)



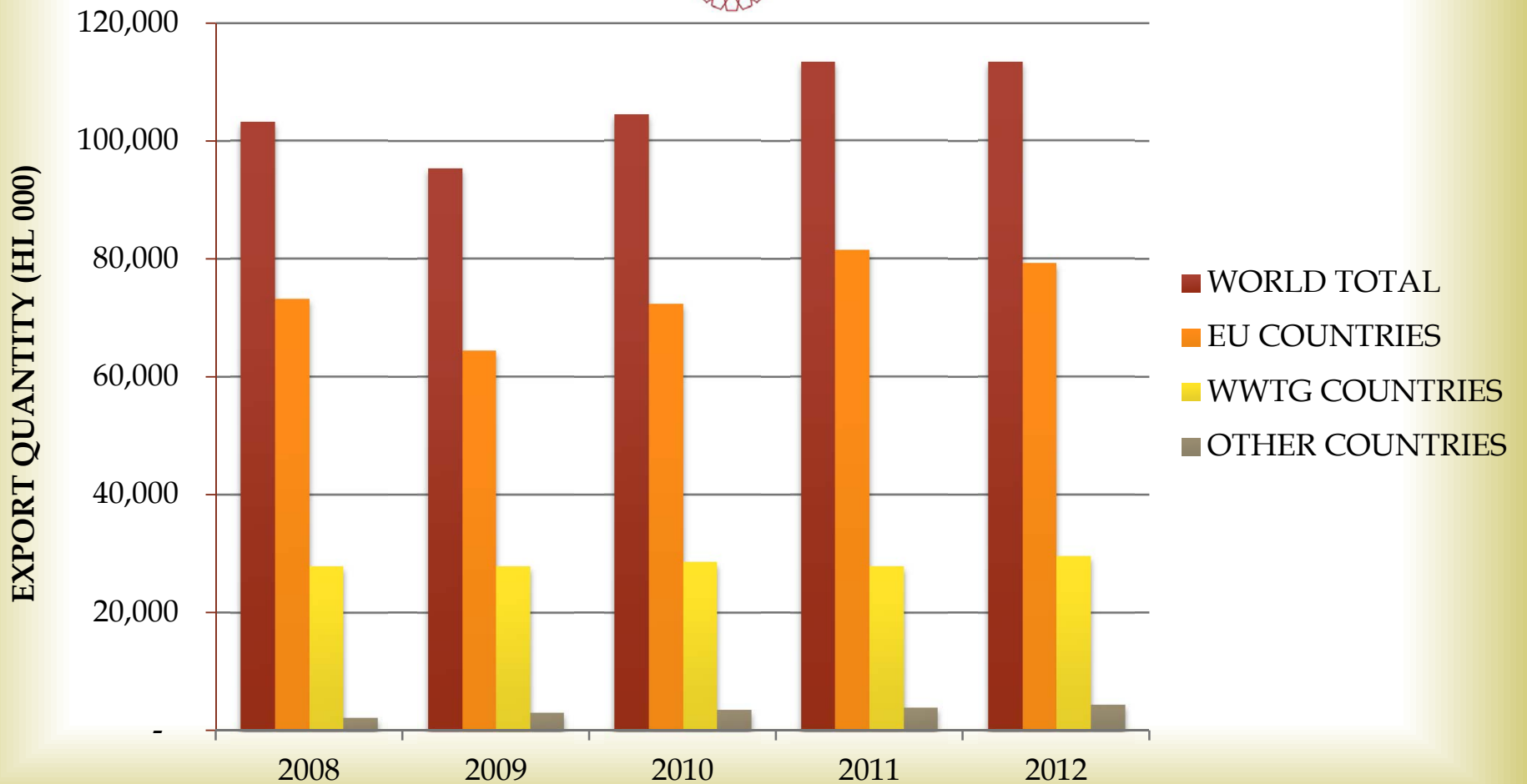
WWTG WINE CONSUMPTION – 2012

61,353 (HL 000)



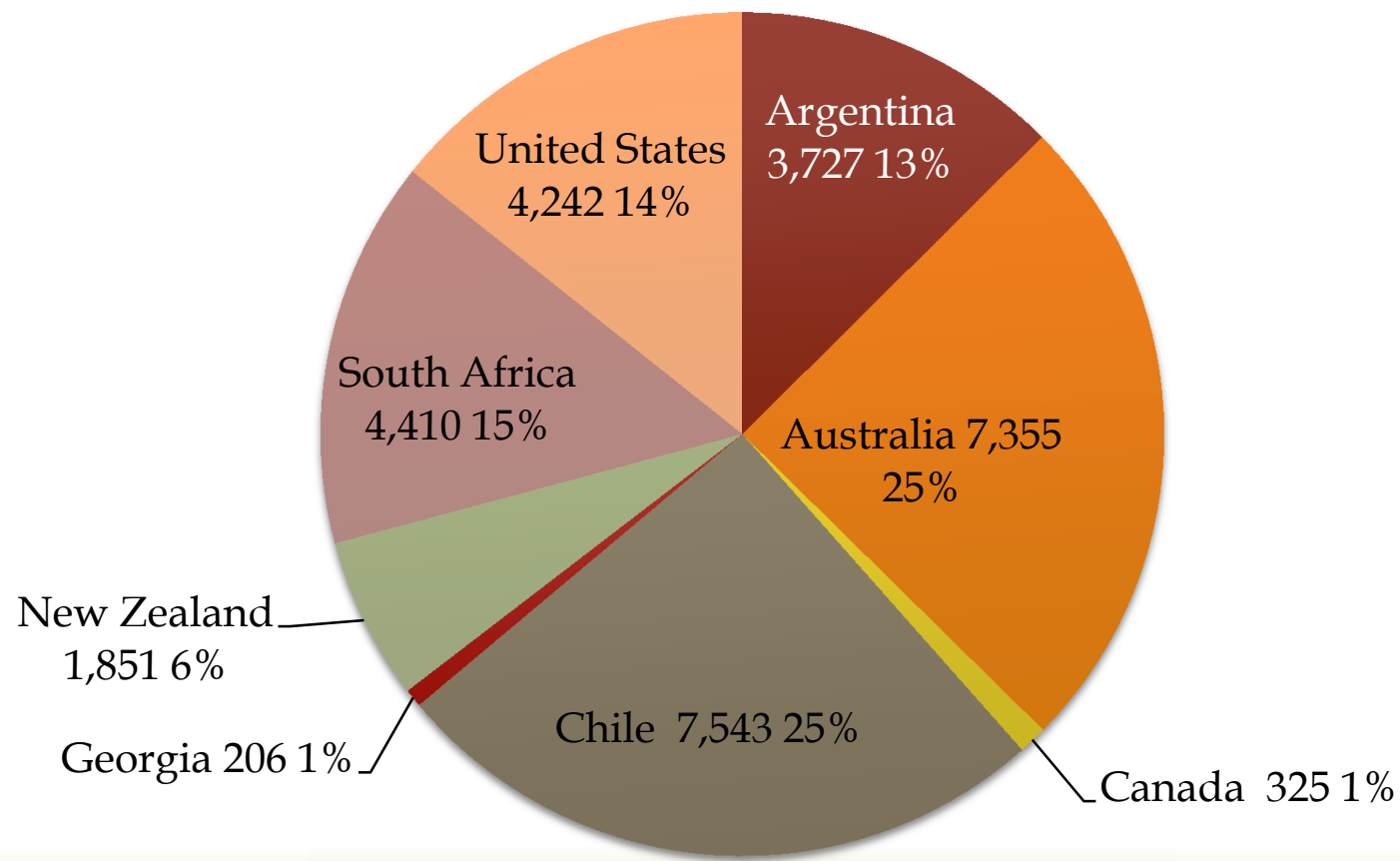
WORLD WINE EXPORTS 2008-2012

(HL 000)

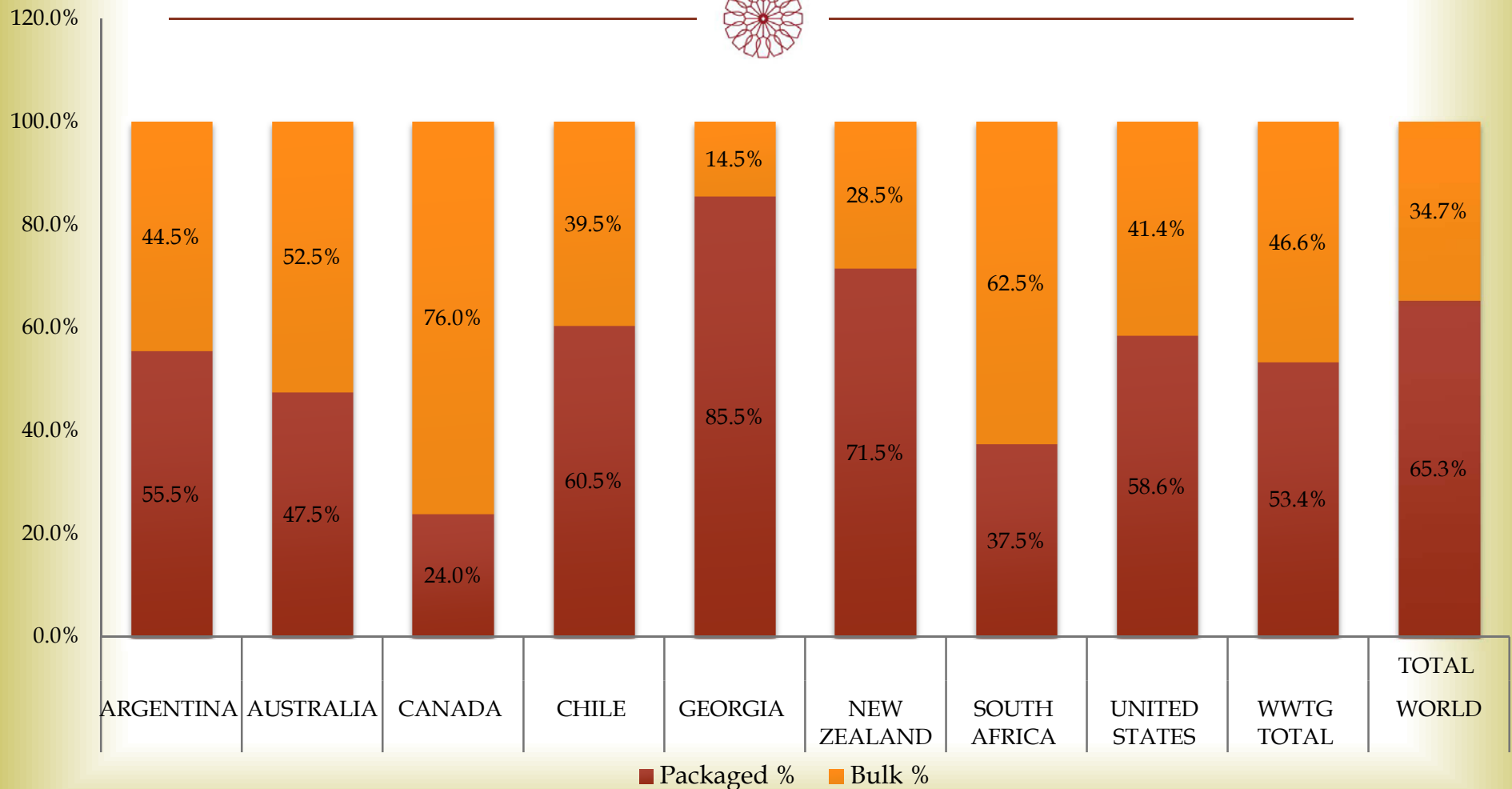


WWTG WINE EXPORTS 2012

29,657 (HL 000)



WORLD & WWTG BULK & PACKAGED WINE EXPORTS 2012 WORLD TOTAL 11.1 BILLION LITERS PERCENT (%)



OTHER FERMENTED BEVERAGES (OFB) EXPORTS ARE GROWING RAPIDLY



World Tariffs schedule contains 3 categories:

- ◆ HTS 2204 Grape Wine including sparkling, table & dessert wine
- ◆ HTS 2205 Vermouth
- ◆ HTS 2206 Other Fermented Beverages

The following is a list of the major OFBs:

Cider

Perry

Mead

Special Natural Wines

Huangjiu (Chinese yellow wine)

Mac-Gul-Lie (South Korean rice wine)

Sake

Combinations of grape wine and other beverages

OFB SHARE OF WORLD EXPORTS IS INCREASING RAPIDLY (Liters 000)



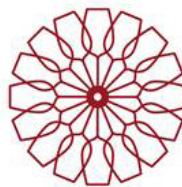
	2008	2009	2010	2011	2012	% Change
Grape Wine	9,816,060	8,893,030	9,690,231	10,370,167	10,348,617	5.43%
OFB	509,445	633,478	753,634	966,955	987,190	93.78%
OFB % of Grape Wine	5.19%	7.12%	7.78%	9.32%	9.54%	83.81%

OTHER COUNTRIES OF SIGNIFICANCE



TARGET COUNTRIES	POPULATION (000)	WINE CONSUMPTION 2012 (Liters 000)	WINE PRODUCTION 2012 (Liters 000)
CHINA	1,343,239	3,687,700	3,311,100
INDIA	1,205,073	14,300	N/A
BRAZIL	205,716	382,000	194,000
NIGERIA	170,123	39,360	N/A
RUSSIA	138,082	1,186,000	620,000
JAPAN	127,368	1,001,900	734,000
MEXICO	114,975	149,000	102,000
SOUTH KOREA	48,860	919,200	101,200
TOTALS	3,353,436	7,379,460	5,062,300
WORLD TOTAL	7,101,130	24,966,704	25,721,000
% OF WORLD	47.2%	29.6%	19.7%

THANK YOU



*PREPARED BY
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TRADE DATA AND ANALYSIS
PEBBLE BEACH, CALIFORNIA, USA*