



# JORNADA CAFÉ, CACAO Y VINO



*Overview of the wine sector:  
Its value chain and territorial links*

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INTERNATIONAL ORGANISATION OF VINE AND WINE  
2 October 2020 – University of St.Gallen



# SUMMARY

1. The OIV
2. Value chain and territorial links
3. Latest trends in wine consumption
4. Overview of the wine sector in Latin America
5. Switzerland – Wine sector overview





# OIV Strategic Plan 2020-2024

**AXIS I:** Promote environmentally-friendly vitiviniculture

**AXIS II:** Promote economic activity according to principles of sustainable development and of growth and globalisation of markets

**AXIS III:** Contribute to social development through vitiviniculture

**AXIS IV:** Pursue the development of a harmonised regulatory environment

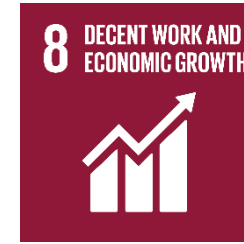
**AXIS V:** Facilitate the digital transition of the sector

**AXIS VI:** Consolidate the role of the OIV as a global scientific, technical and cultural reference organisation



# OIV Strategic Plan 2020-2024

## UNITED NATIONS' SDG (13/17) STRATEGIC PLAN 2020-2024





# Value chain and territorial links



## Value chain and territorial links

- Origin of Wine is very important for the average consumer. Branding is a synergy of many factors, not only trade-marks.
- Producers (farmers) are empowered by the system
- As a result:
  - The economic structure is fragmented (thousands of wine producers - dispersion of profit centers)
  - Price formation is non-concentrated
  - Equilibrium of the value chain in all its links
  - Wide price segmentation and quality perception



**Added Value remains in the territory of production**

## **SECTOR INEXTRICABLY LINKED TO ITS REGION/TERRITORY**

- Diversified, with a multitude of actors, with strong local and rural roots
- Ensures the maintenance of rural populations
- High environmental and social awareness



## Why focusing on the wine sector?

### SECTOR WHERE TRADE AND EXCHANGES ARE OF UTMOST IMPORTANCE

- High value-added products – identified from farm to glass (bottles on the table cloth)
- Long-lasting, easily transportable and exchangeable product
- Highly developed international trade  
( almost 1/2 of the bottles have crossed at least one border)



## Why focusing on the wine sector?

### CONTRIBUTES TO THE DEVELOPMENT, REPUTATION & IMAGE OF ITS REGION/COUNTRY

- Certain landscapes and viticultural activities recognised by UNESCO as tangible and intangible World Heritage
- Oenotourism is an activity in itself, which has its origins in the wine-growing activity present on site
- High potential for rural development: local rural labour force available for the development of further activities

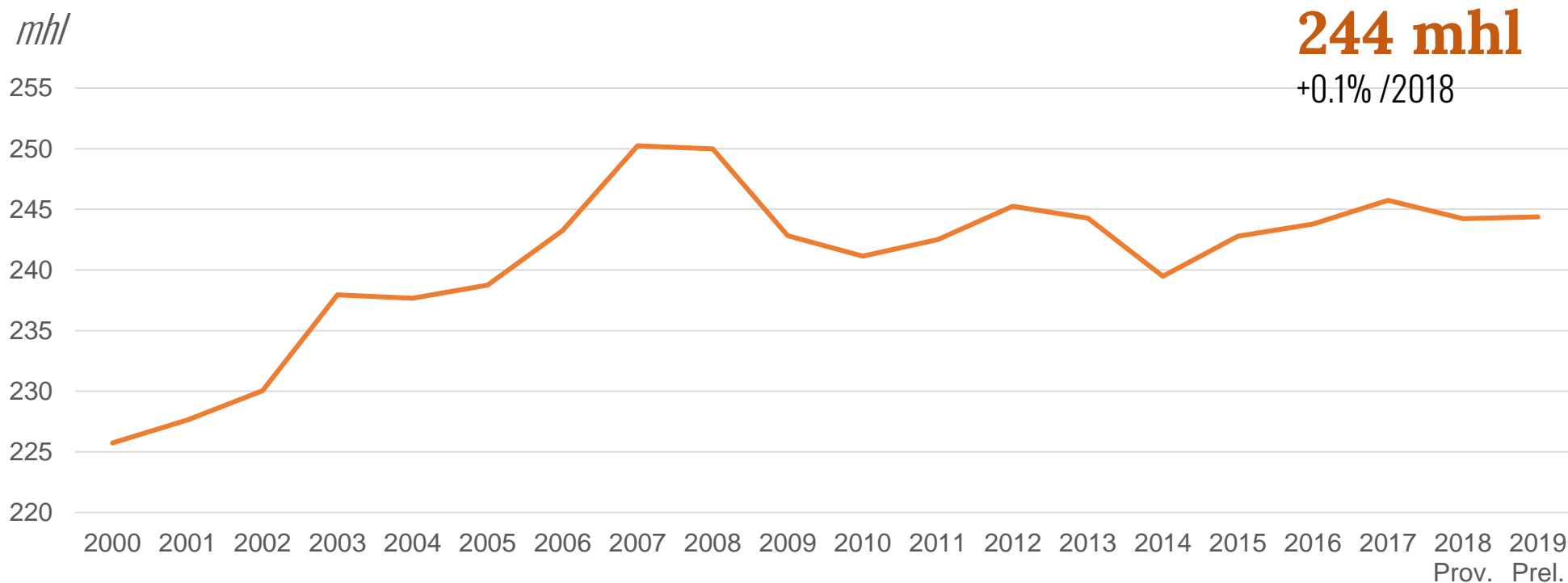


# Latest Trends in Wine consumption



# Wine Consumption

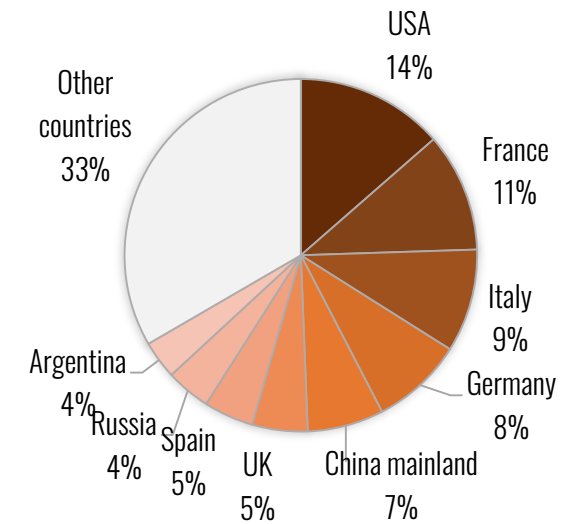
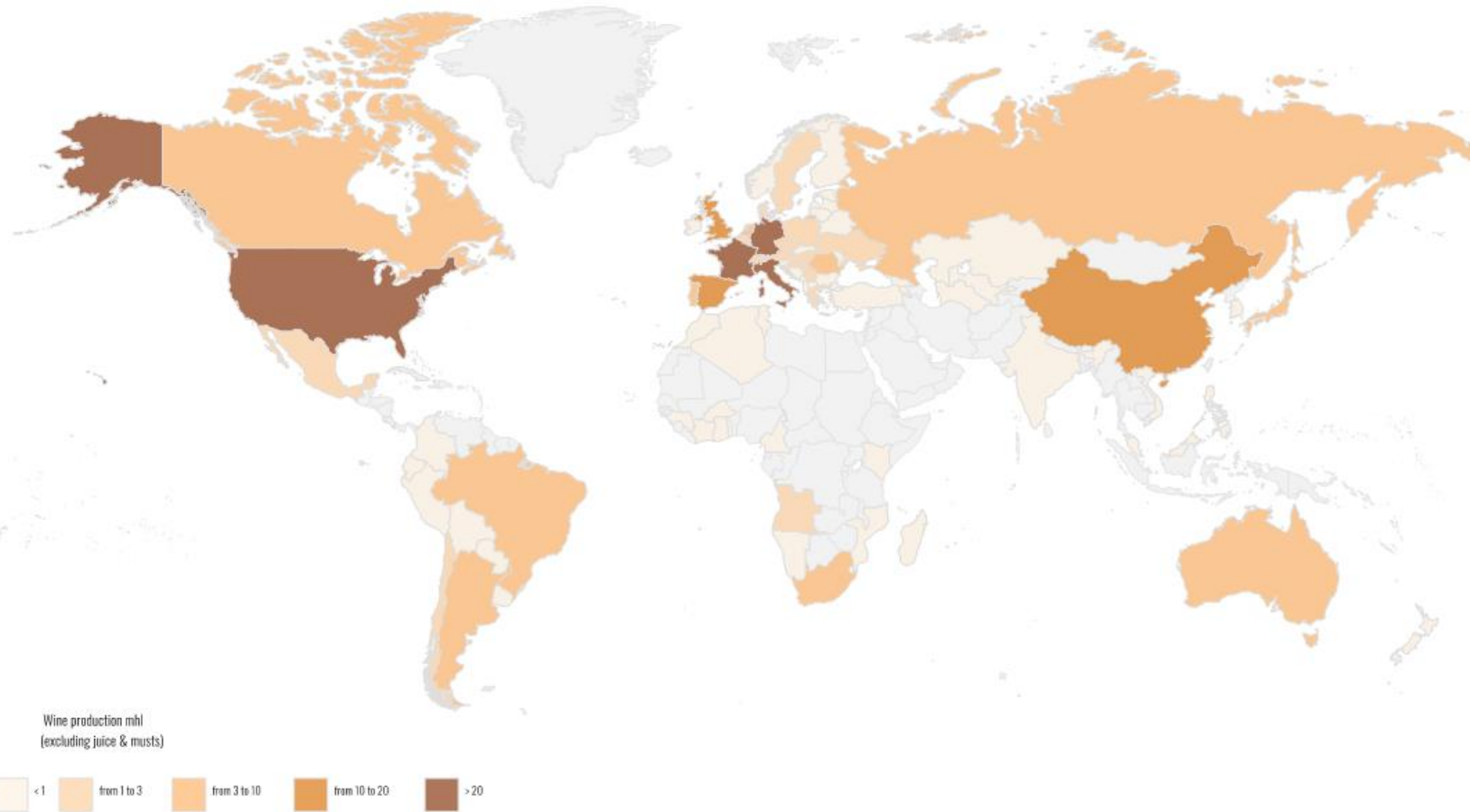
## EVOLUTION OF WORLD WINE CONSUMPTION





# Wine Consumption

## WORLD WINE CONSUMPTION DISTRIBUTION IN 2019

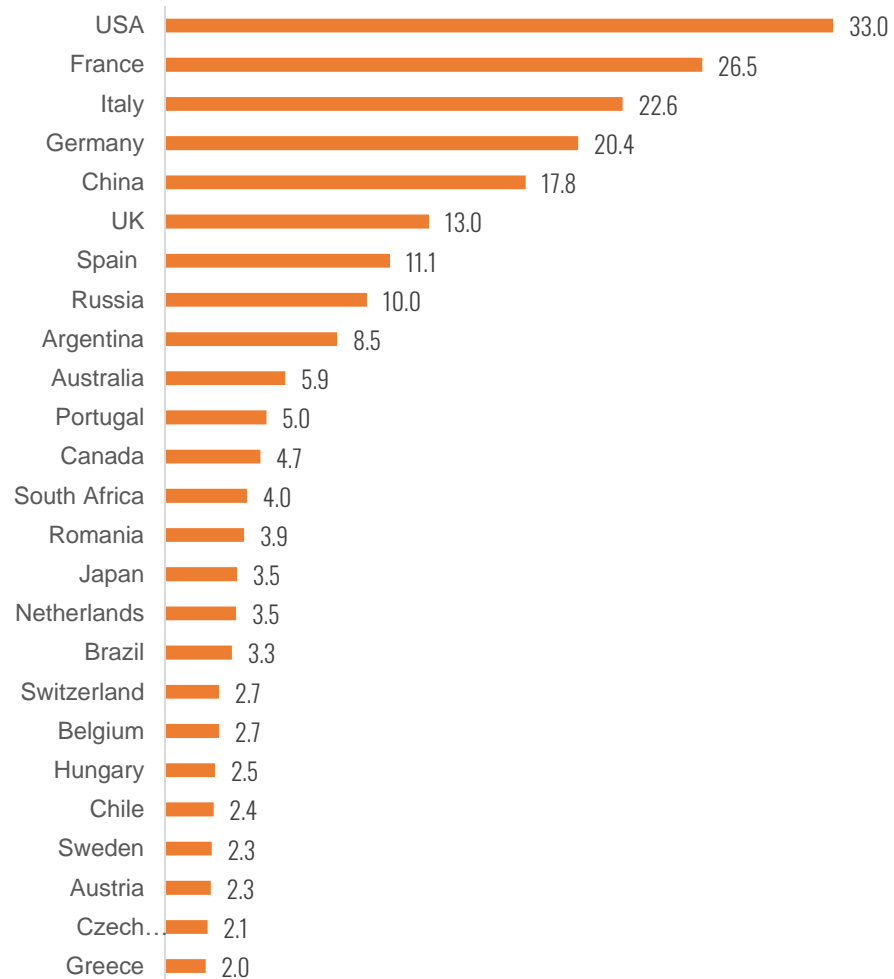


Breakdown of wine consumption in 2019

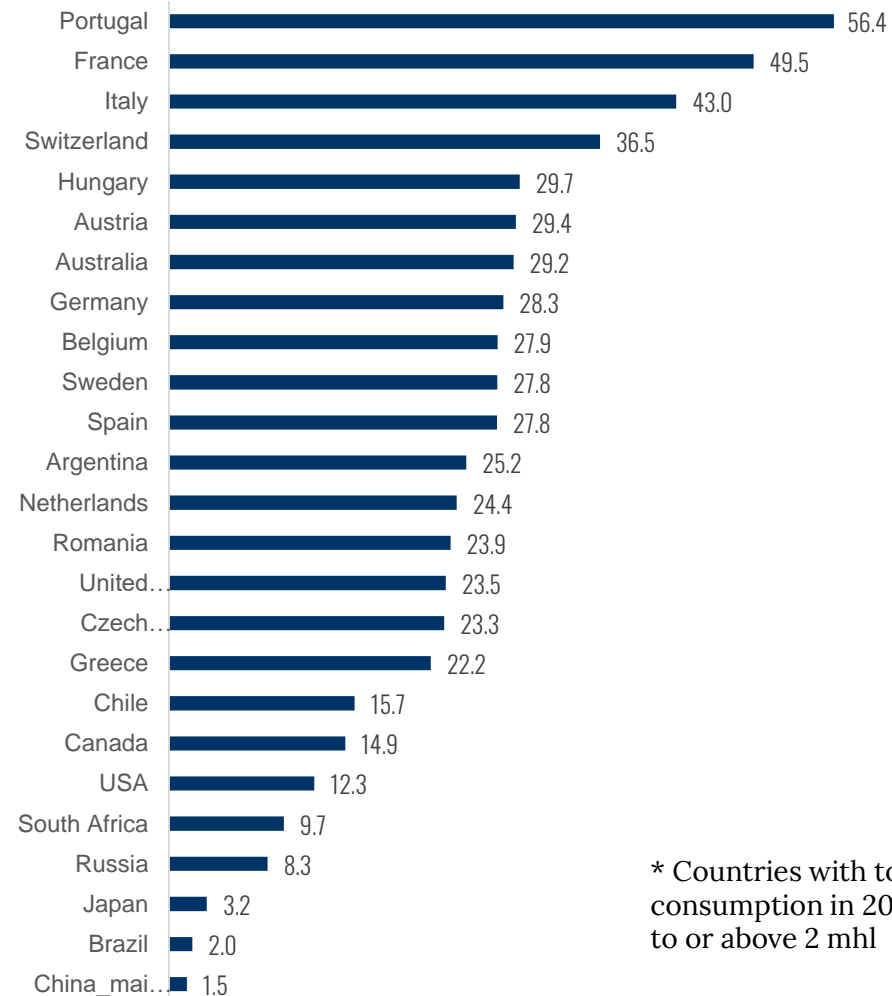


# Wine Consumption

Top countries\* by total consumption (mhl) in 2019



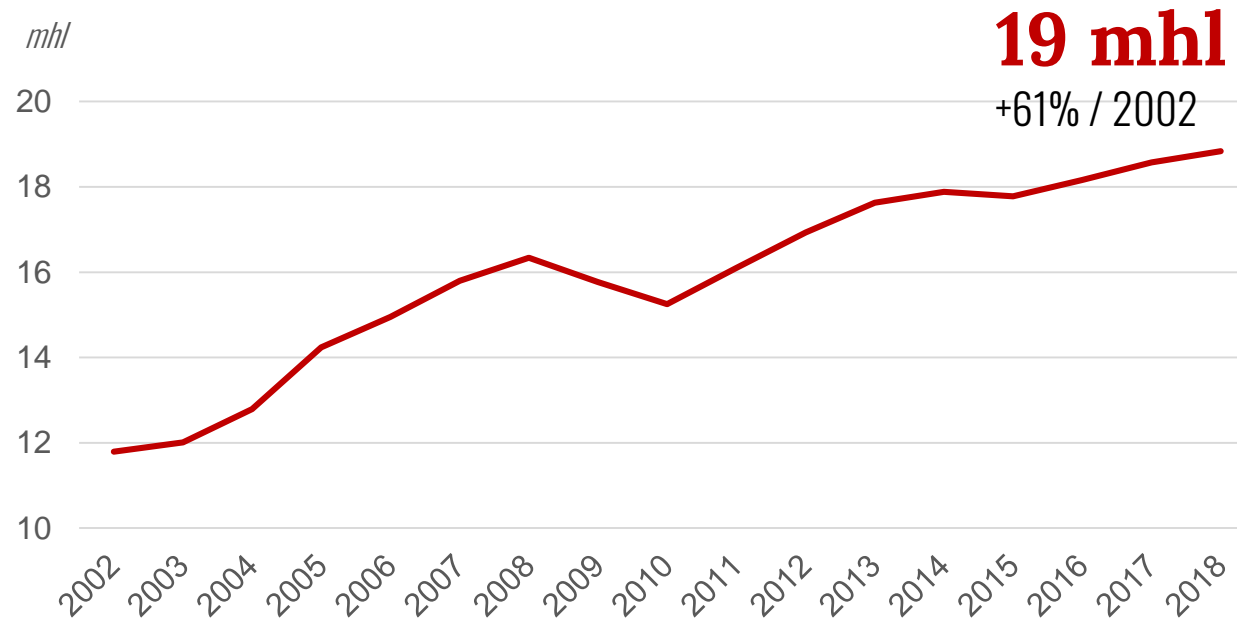
Top countries\* by consumption per capita +15 (l )



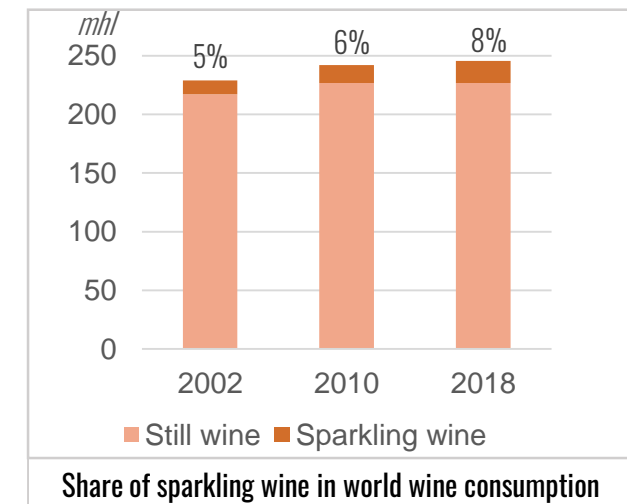
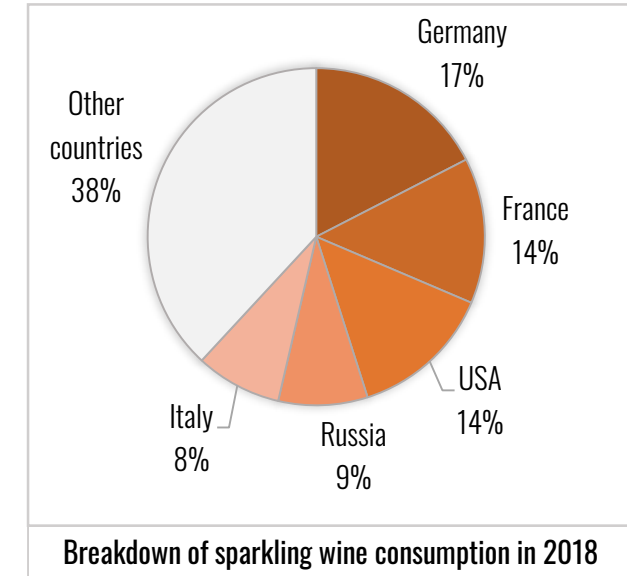
\* Countries with total wine consumption in 2019 equal to or above 2 mhl



## EVOLUTION OF WORLD CONSUMPTION OF SPARKLING WINE



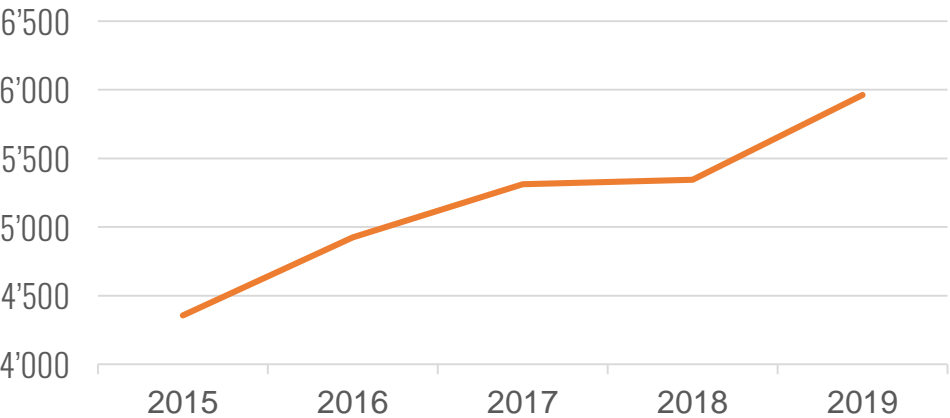
## Sparkling Wine Consumption



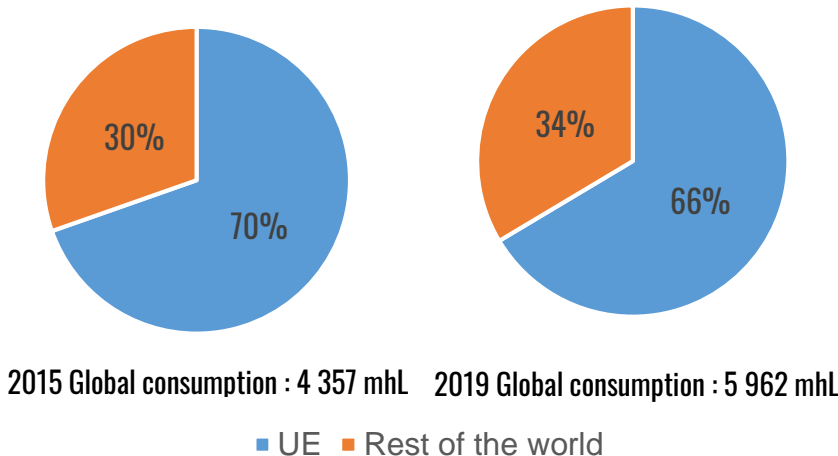


# Organic wine consumption

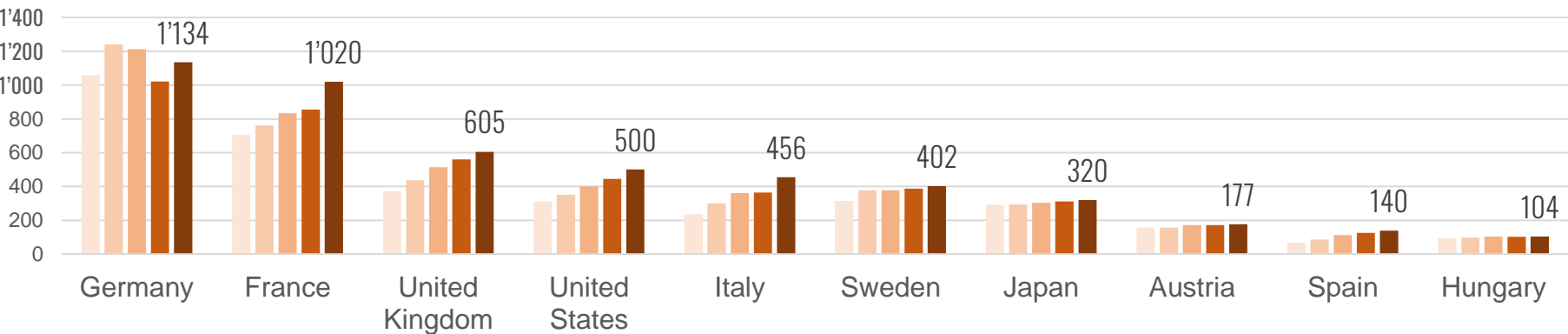
WORLD'S ORGANIC WINE CONSUMPTION (khl)



WORLD'S ORGANIC WINE CONSUMPTION



TOP 10 ORGANIC WINE CONSUMING COUNTRIES (khl), 2015-2019



Source:  
IWSR

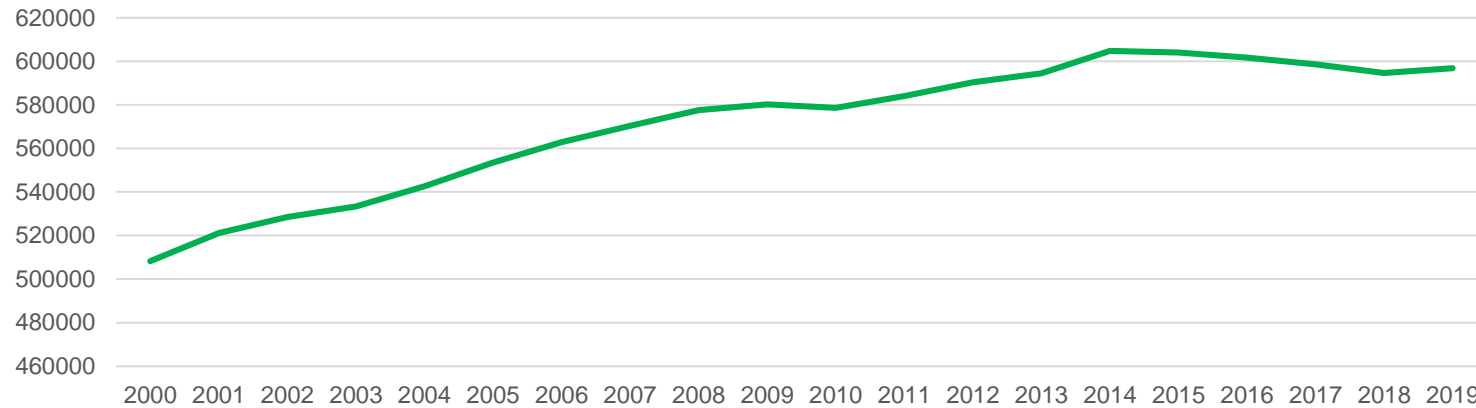


# Overview of the wine sector in Latin America



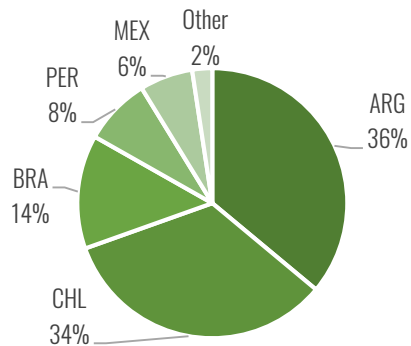
# Latin America – Area under vines

AREA UNDER VINES IN LATIN AMERICA (ha)

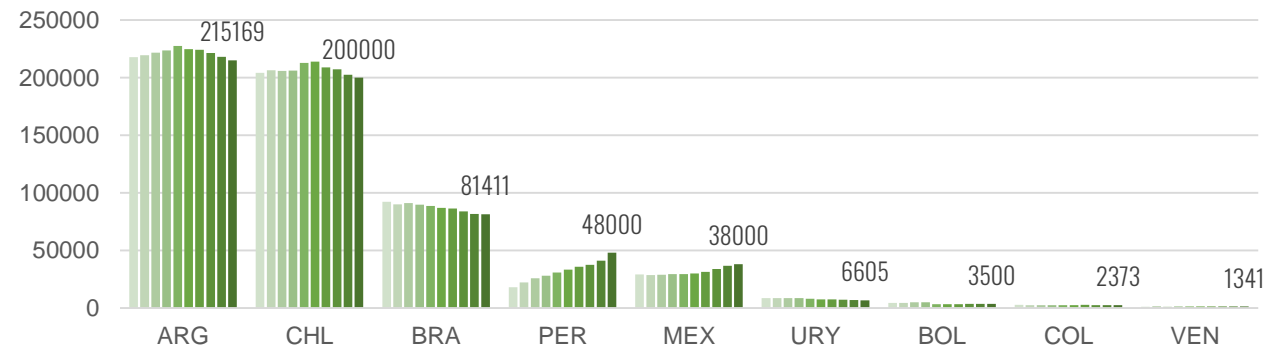


**597 kha**  
8% of the  
world surface

2019



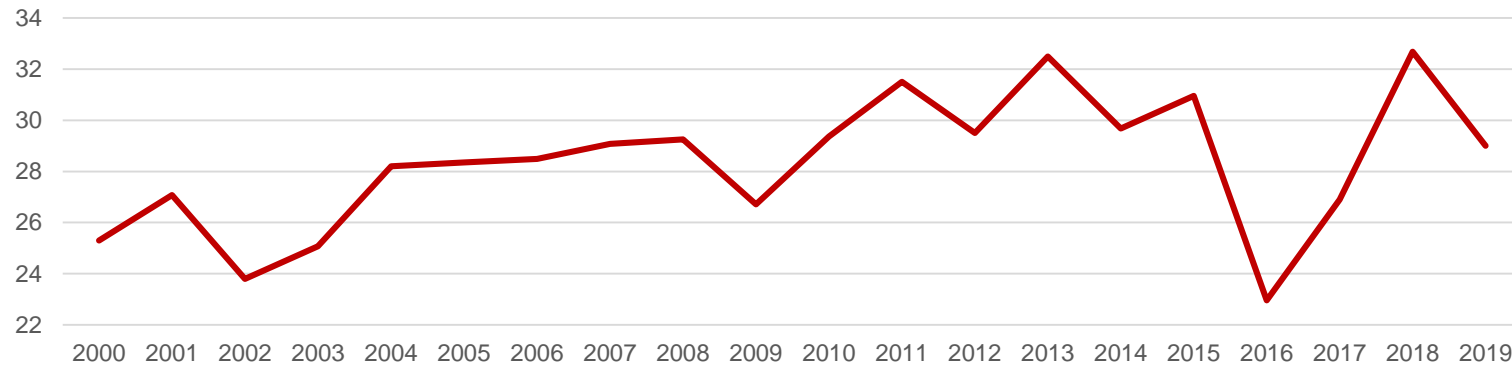
TOP VINEYARDS BY SURFACE AREA (ha), 2010-2019





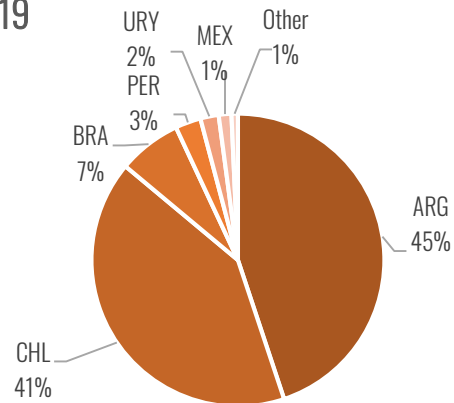
# Latin America – Wine production

LATIN AMERICA WINE PRODUCTION (mhl)

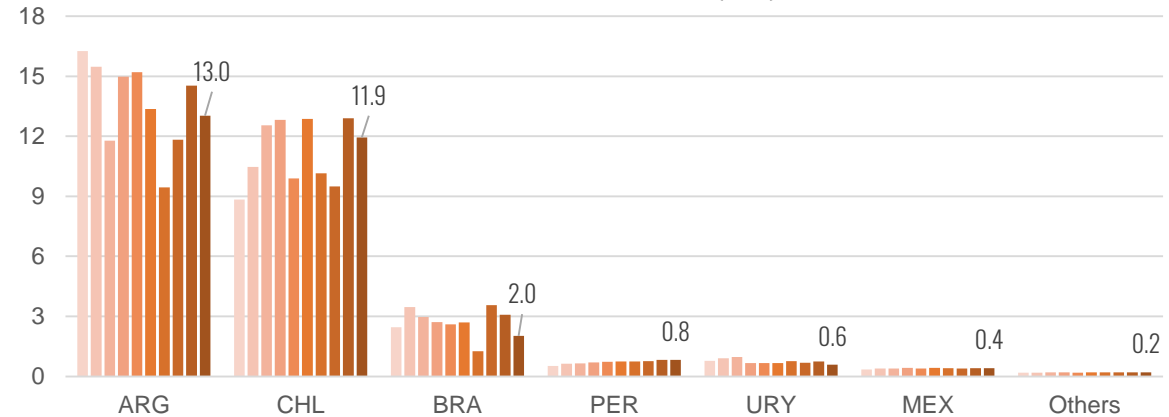


**29 mhl**  
11% of the world  
production

2019

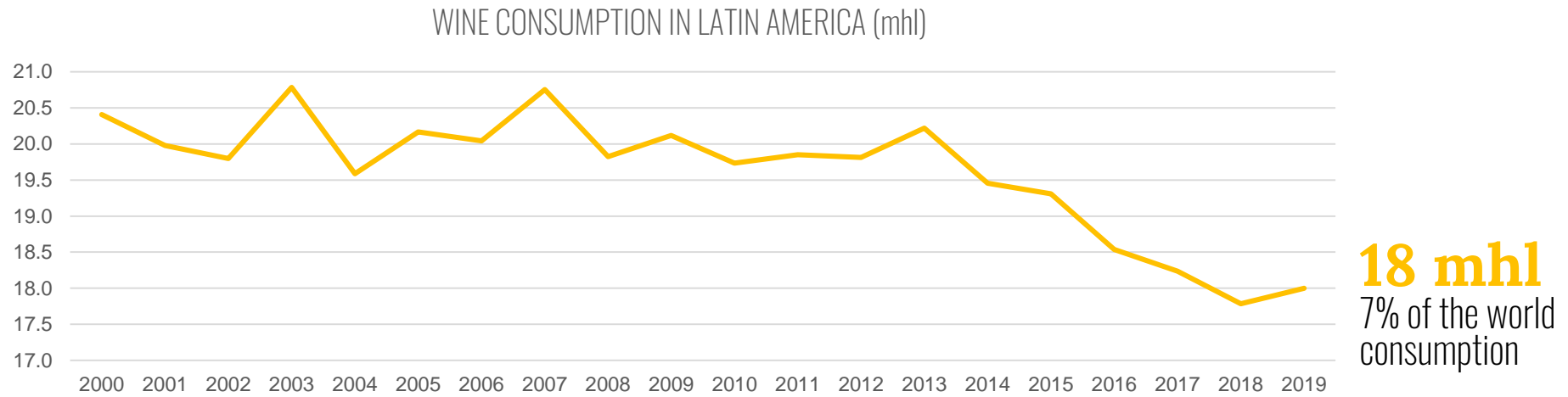


MAJOR WINE PRODUCING COUNTRIES (mhl), 2010-2019

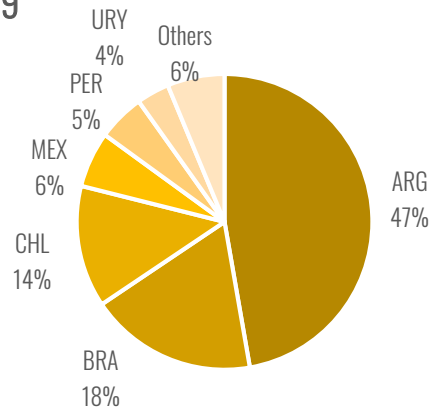




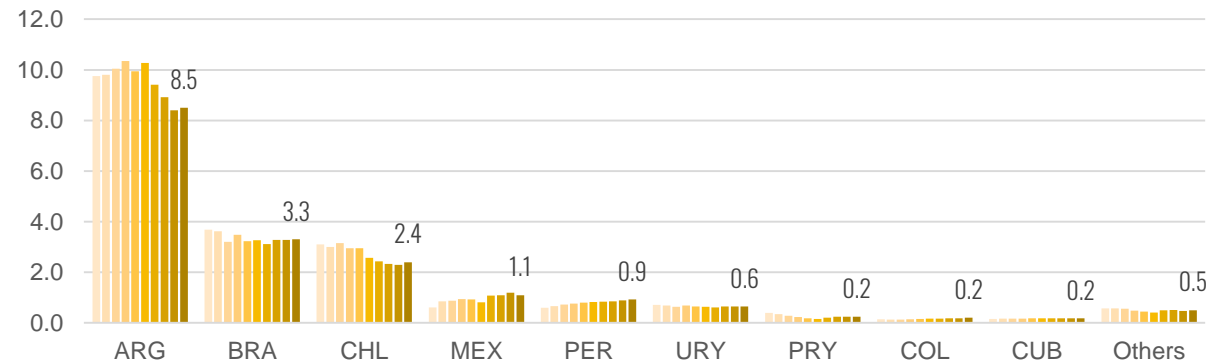
# Latin America – Wine consumption



2019

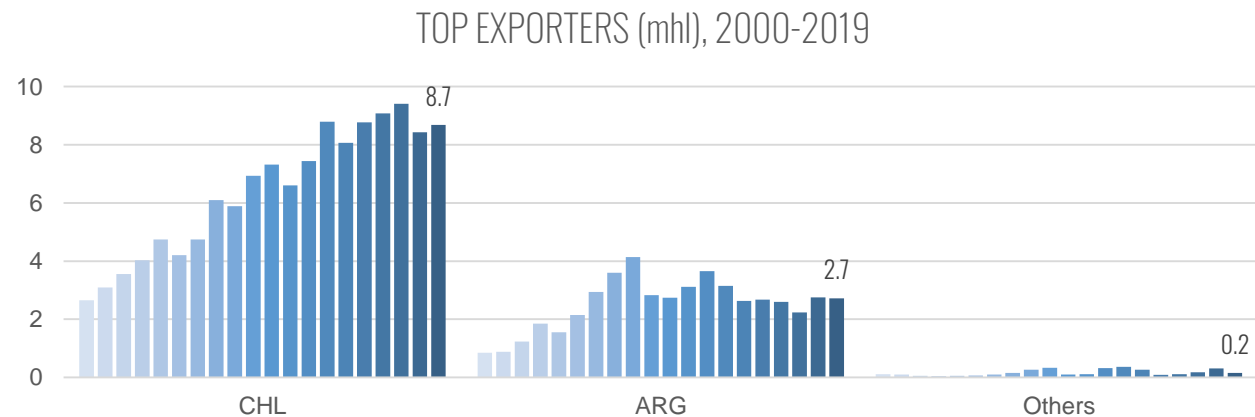
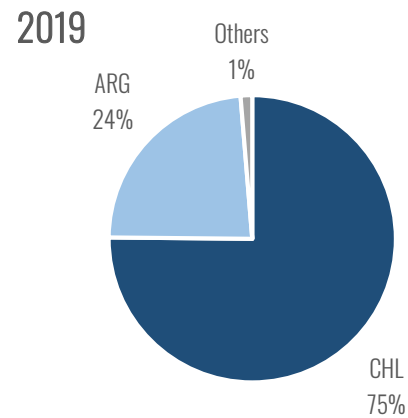
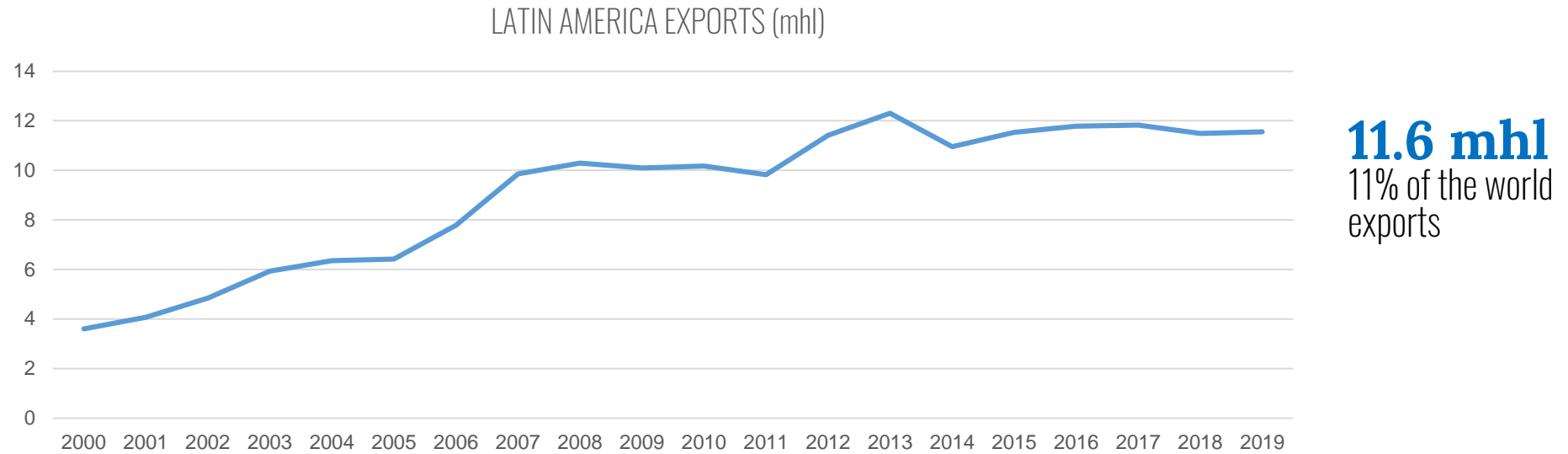


MAJOR WINE CONSUMING COUNTRIES (mhl), 2010-2019





# Latin America – Wine exports

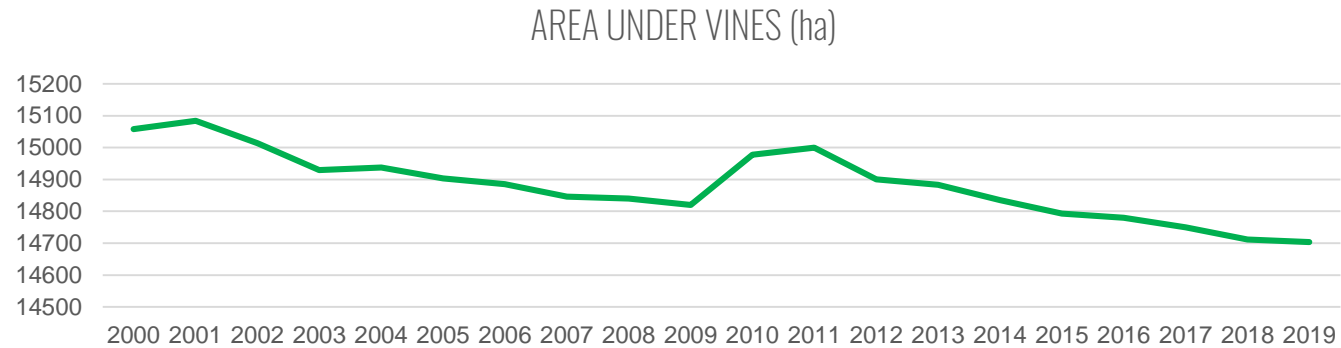




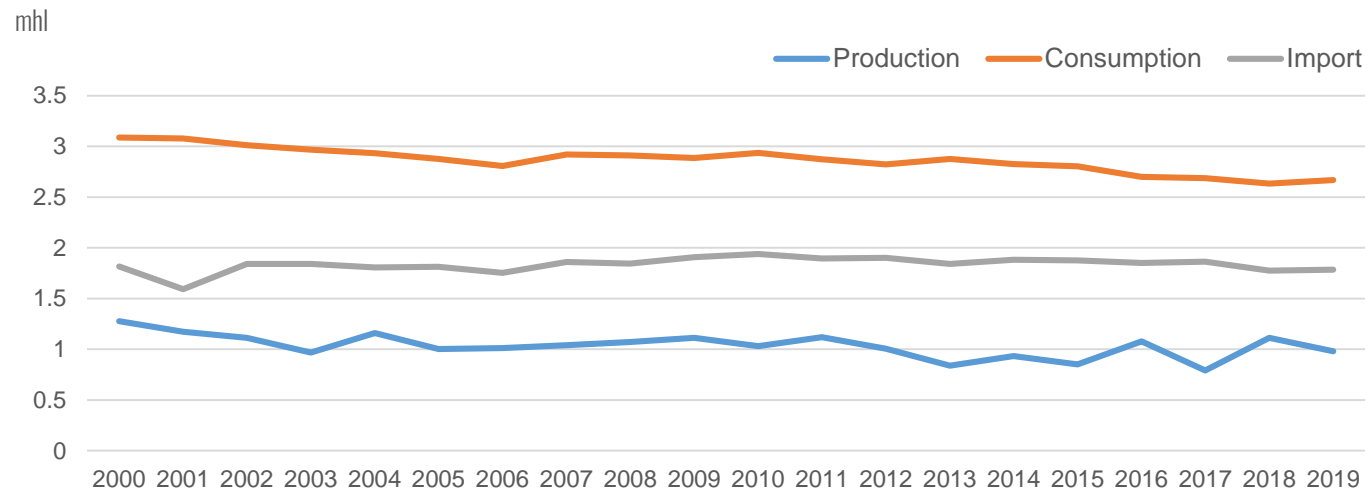
# Evolution of the Swiss wine sector



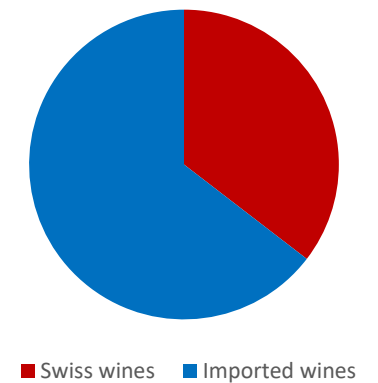
# Switzerland – Wine sector overview



**14.7 kha**  
in 2019



Wine consumption (2019)  
2.7 mhl





# JORNADA CAFÉ, CACAO Y VINO

THANK YOU  
FOR YOUR ATTENTION



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