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Area under vines in the EU down by 15.7% between 1989 and 1999 ¹

Pierre Bruyas

Between 1989 and 1999 the total area under vines in the European Union shrank by 15.7% to 3.2 million hectares. The area is divided among 1.5 million holdings, a number which is down by 30.5%. The average size per holding thus increased from 1.8 to 2.2 hectares (+21%).

Reduction in area general throughout the Union

The number of holdings fell by more than 30% in Greece, France, Italy, Luxembourg and Portugal. The area under vines in these countries also declined. In Germany the reduction in the number of holdings was only 11,4% but the area under vines recorded a slight increase (+1.9%). In Spain there were reductions in both area (-19.8%) and number of holdings (-13.9%). There were significant regional differences within the Member States covered by the survey.

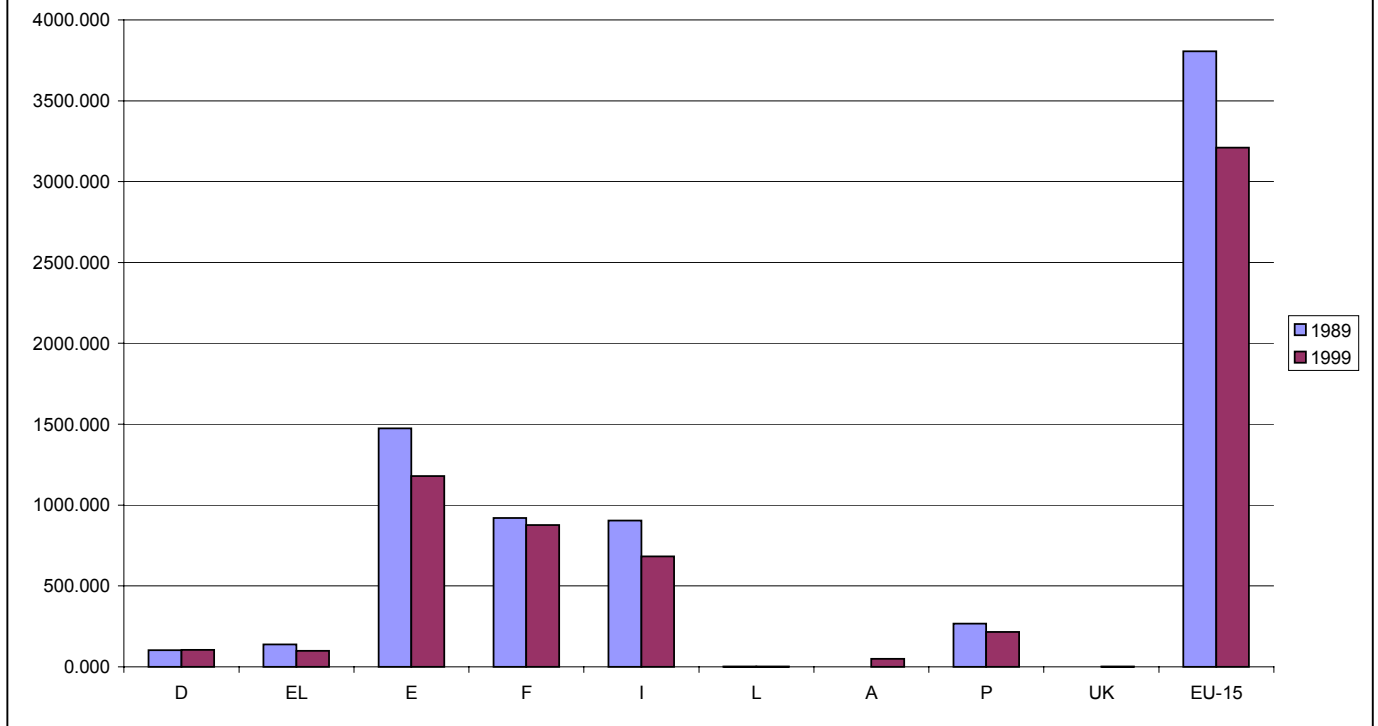
- Germany was the Member State where trends were most evenly distributed.
- In Greece the changes in each region had a noticeable impact on the geographical distribution of vineyards. The area under vines declined by 55% in the region of Nisia, which had been ranked first in 1989. In spite of a reduction in area of 7.5%, Kentriki Ellada is now the main wine-producing region.
- The area under vines in the southeast of France (Provence-Alpes-Côte-d'Azur and Languedoc-Roussillon) decreased sharply, whereas there were often sizeable increases in regions in the southwest and northeast (+22.5% in Bourgogne).
- In Italy, where vineyards are found throughout the country, the area under vines declined in every region apart from Trentino-Alto Adige and Friuli-Venezia Giulia.
- The situation was similar in Portugal, with reductions occurring in every region apart from Alentejo (+30%).

Area under vines						
	Number of holdings			Area under vines (1000 ha)		
	1989	1999	Variation (%)	1989	1999	Variation (%)
D	77 388	68 603	-11.4	102.000	104.200	2.2
EL	259 167	159 787	-38.3	138.000	100.000	-27.5
E	397 159	342 096	-13.9	1473.600	1179.900	-19.9
F	166 272	109 869	-33.9	920.000	876.000	-4.8
I	864 536	522 311	-39.6	905.000	682.000	-24.6
L	871	601	-31.0	1.350	1.350	0.0
A		32 044			49.000	
P	367 007	247 073	-32.7	267.000	216.000	-19.1
UK		372			0.870	
EU-15	2 132 400	1 482 756	-30.5	3806.950	3209.320	-15.7

Source: Eurostat basic vineyard survey 1989-1999

¹ The reduction was limited to 15.7% thanks to the inclusion of Austria, which joined the EU in 1995, and the United Kingdom, which took part in the survey for the first time in 1999. If the survey coverage had been the same as in 1989, the reduction would have been 32%.

Change in area under vines (1989-1999), 1000 ha



Source : Eurostat basic vineyard survey 1989-1999

Strong increase in areas producing quality wine

Wine grapes are the main production of the European Union's vineyards, with more than 3 million hectares of the 3.2 million under vines - i.e. 95% - producing such grapes.

Table grapes are grown in five Member States (Greece, Spain, France, Italy and Portugal). In spite of a reduction in area of 41%, Italy on its own accounts for 40% of table grape production. France, Portugal, Greece and Spain recorded similar reductions in area.

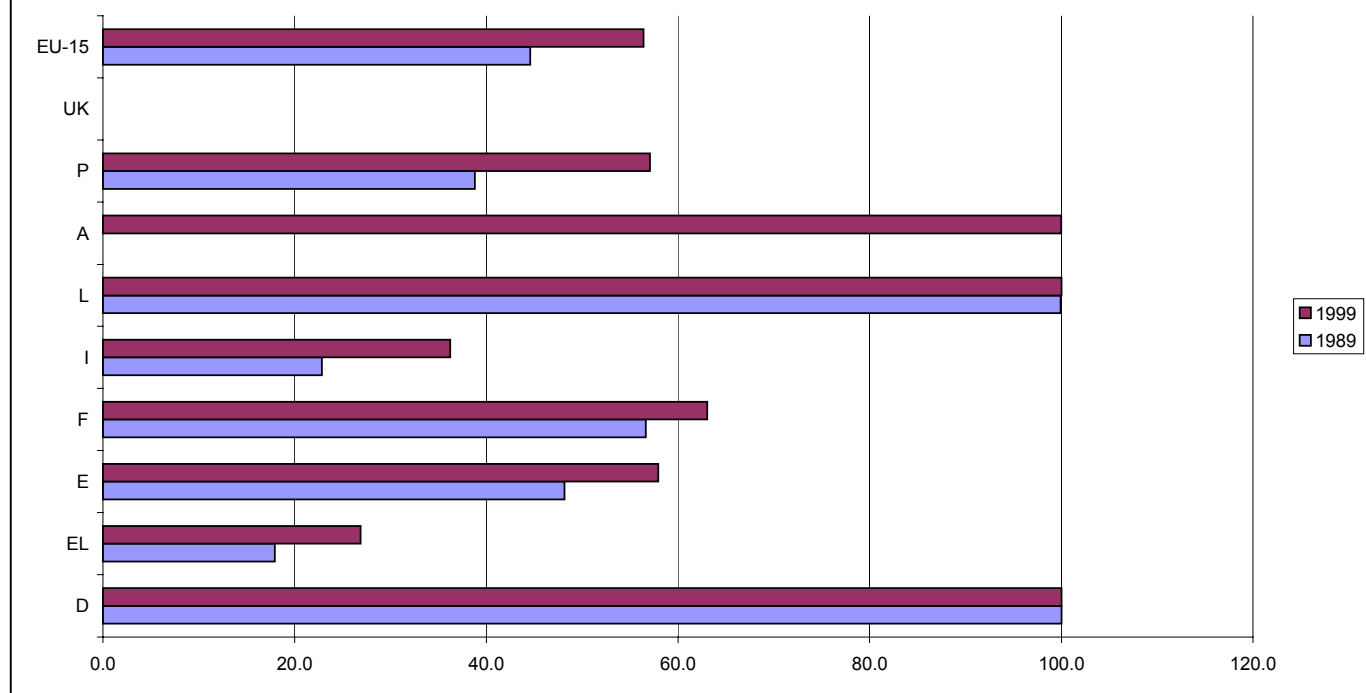
The area under vines for the production of raisins is almost all in Greece. The total area declined by 20% compared with 1989.

Wine grapes account for the bulk of European vineyard production. The sector has contracted in every Member State, and at the same time it has undergone significant restructuring.

Quality wines have taken the place of other types of wine. The trend is general throughout the EU. Although the number of holdings producing quality wine is down by 1.9%, the total area producing such wine is up by 8.1%. The biggest increases have occurred in Italy (+21%) and Portugal (+18%). The increase was less than 10% in the other Member States.

Areas producing quality wine are now predominant in the EU (56% in 1999 compared with 45% in 1989). There are still differences among the Member States, however. All production in Germany and Luxembourg is for quality wine. In Italy, in spite of an increase of 22%, quality wine accounts for only 36% of production.

Proportion of vineyards producing quality wine per 1989-1999 (%)



Source : Eurostat enquête de base sur les superficies en vigne 1989-1999

Varieties adapted to location

During the survey only areas producing wine grapes are broken down by variety and grouped according to the colour of the grapes (white or red). The choice of a variety depends on soil and weather conditions in the area of cultivation, but also on economic decisions by wine-growers. The number of different varieties recorded in a Member State thus depends to a large extent on the distribution of vines in the country.

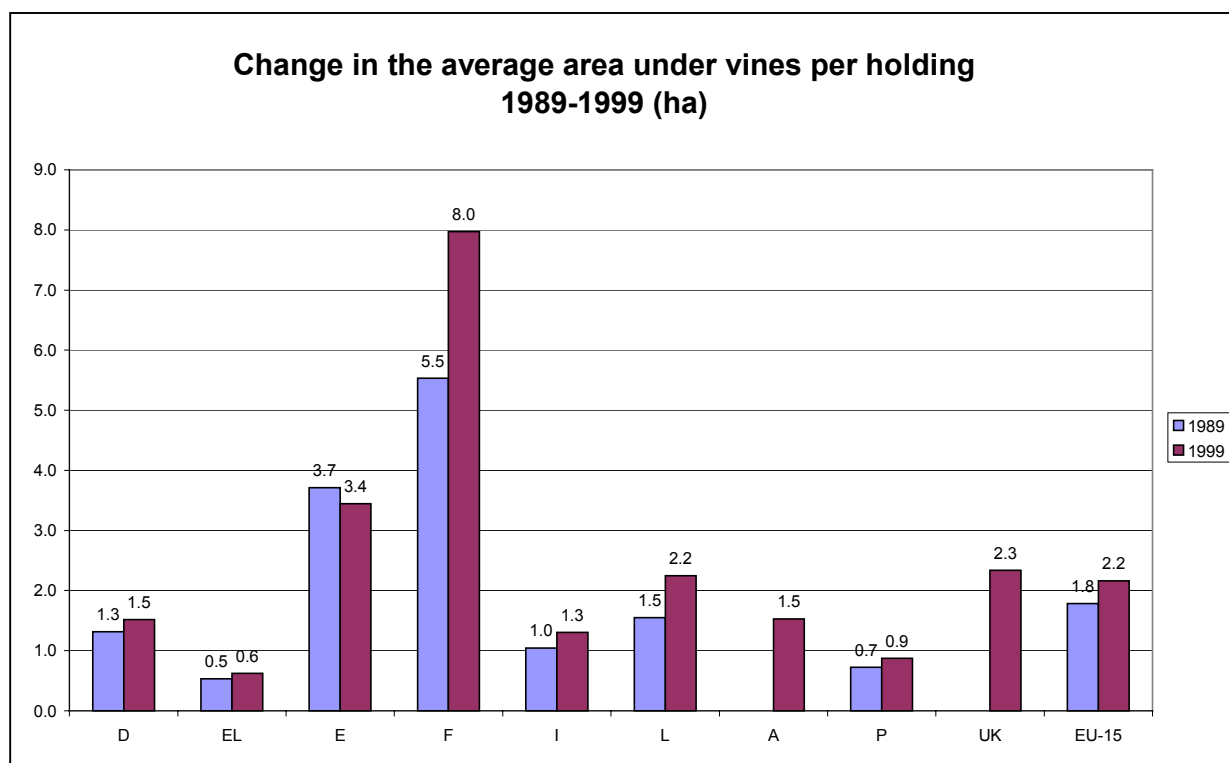
- In Germany, where vineyards are mainly in four Länder, white varieties (mainly Riesling, Weisser and Müller-Thurgau) are grown on more than 75% of the area under vines. The situation is similar in Luxembourg and Austria, where white varieties also dominate.
- In Greece red and white varieties are almost equally divided. There is a wider range of red varieties, with five varieties accounting for half of the area producing red grapes. In the case of white varieties, Savvatiano is grown on half of the area producing white grapes. There has been a sharp decline in the production of white varieties: down from 63% of wine grapes in 1989 to 48% in 1999.
- In Spain white varieties dominate and account for 63% of the area under vines. There has been little change since 1989.
- In France red varieties have declined by 7% but still account for 68% of production. The Carignan variety has increased by 43%, with the Merlot and Grenache varieties up by 68% and 10% respectively. Among the white varieties, Chardonnay blanc and Sauvignon blanc have gone up by 83% and 74%.
- In Italy red and white varieties are equally divided and offer a wide range. As many as seven red and nine white varieties account for half of the area under vines. Among the red varieties, Barbera and Negro amaro have declined by 40% and 46%.
- In Portugal there is a slight preference for red varieties (58% of the area under vines). As in Italy, there is a wide range. Among the white varieties, Fernao Pires and Vital have declined significantly: down by 39% and 63% respectively.

Half of holdings are less than half a hectare

The number of holdings of less than half a hectare decreased by 33% between 1989 and 1999. They still account for more than half of all vineyards in the EU but account for only 5% of the total area under vines. At the other extreme, vineyards over 10 hectares have increased by 2.4%. They account for 4.5% of holdings but produce 50% of the grapes grown in the EU. The reduction in the number of holdings has been accompanied an increase in the number of large holdings. There has been a percentage decline in every size category under 10 hectares, but holdings over 30 hectares have increased their area share from 15% in 1989 and now account for 19%.

Share of the area under vines and holdings by size of holding (%), EU-15				
Size of holding under vines (ha)	Area under vines		Holdings	
	1989	1999	1989	1999
< 0,10	0.3	0.2	8.2	7.7
0,10 - < 0,20	1.0	0.9	12.3	13.9
0,20 - < 0,30	2.0	1.5	15.8	13.7
0,30 - < 0,50	3.5	2.7	16.7	15.5
0,50 - < 1	6.6	5.2	17.2	16.3
1 - < 2	10.2	8.3	12.8	12.8
2 - < 3	7.4	6.4	5.3	5.5
3 - < 5	10.8	9.6	4.7	5.2
5 - < 10	17.4	16.8	4.0	4.9
10 - < 20	18.1	19.6	2.1	2.9
20 - < 30	7.6	9.8	0.5	0.8
> = 30	15.3	19.0	0.4	0.7

Source : Eurostat basic vineyard survey 1989-1999



Source : Eurostat basic vineyard survey 1989-1999

About 7% of production is exported outside the EU

In the ten years under review the production of wine for human consumption and other uses fluctuated between 156 and 193 million hectolitres, depending on the weather each year. In 2000, production totalled 176 million hectolitres. The average over the period came to 166 million hectolitres.

France, Italy and Spain accounted for 87% of total production. Human consumption in the 1996-2001 period amounted to 127 million hectolitres, i.e. 76% of available production. Per capita consumption, which varies depending on habits in each Member State, amounted to 32 litres in 2000-2001. This figure has been following a downward trend since 1991, when per capita consumption in the EU was 35.6 litres. With exports of more than 12 million hectolitres in 2000-2001, the European Union continues to be a net exporter of wine. Imports from non-member countries amounted to 8.4 million hectolitres. Exports outside the EU thus returned to the level of 1997-1998. There had been sharp declines in the next two years, with the export figure falling to below 7.5 million hectolitres. Italy and France are the main exporting countries, and also the main exporters to other Member States. In 2000-2001 Italy and France accounted for 70% in volume terms of the wine exported to non-member countries.

Usable production of wine (1000 hkl)						
	1995/1996	1996/1997	1997/1998	1998/1999	1999/2000	2000/2001
D	8 361	8 678	8 394	10 727	12 244	9 950
EL	3 875	4 105	3 980	3 826	3 680	3 558
E	20 876	31 000	33 218	31 173	33 723	41692.00
F	54 354	57 240	53 612	53 071	60 535	57540.00
I	55 702	56 322	50 117	57 140	58 073	54088.00
L	150	128	75	159	184	132
A	2 151	2 091	1 787	2 675	2 760	2 310
P	7 255	9 712	6 124	3 750	7 859	6 709
UK	13	27	7	11	13	14
EU-15	152 739	169 305	157 316	162 534	179 073	175 993

Source: Eurostat wine balance sheet

Trade outside the EU countries (wine-growing year 2000-2001)						
	Exports			Imports		
	within the EU	to non-member countries	Total	within the EU	from non-member countries	Total
B	210	13	223	2335	160	2 495
DK	211	16	227	1382	367	1 749
DK	1 892	610	2 502	9 901	1 903	11 804
EL	665	85	750	70	0	70
E	6 495	2 207	8 702	326	139	465
F	10 854	4 355	15 209	5 038	362	5 400
IRL	3	1	4	210	253	463
I	12 585	4 155	16 740	555	57	612
L	101		101	246	20	266
NL	74	124	198	2 798	590	3 388
A	282	26	308	476	42	518
P	1 134	464	1 598	1 725	0	1 725
FIN	0	1	1	202	142	344
S	1	8	9	994	281	1 275
UK	163	51	214	5 699	4 092	9 791
EU-15		12 116			8 408	

Source: Eurostat wine balance sheet

Total area under vines for wine-grape						
	Number of holdings			Area under vines (1000 ha)		
	1989	1999	Variation (%)	1989	1999	Variation (%)
D	76 683	68 598	-10.5	102.028	104.233	2.2
EL	221 949	131 926	-40.6	74.147	50.878	-31.4
E	371 693	320 834	-13.7	1409.800	1144.354	-18.8
F	164 727	108 771	-34.0	899.499	864.478	-3.9
I	837 236	505 737	-39.6	834.153	636.662	-23.7
L	871	601	-31.0	1.351	1.348	-0.2
A		32 030			48.496	
P	363 673	244 012	-32.9	255.233	205.003	-19.7
UK		372			0.874	
EU-15	2 036 832	1 412 881	-30.6	3576.211	3056.327	-14.5

For quality wines psr						
	Number of holdings			Area under vines (1000 ha)		
	1989	1999	Variation (%)	1989	1999	Variation (%)
D	76 683	68 598	-10.5	102.028	104.233	2.2
EL	29 579	24 115	-18.5	13.300	13.671	2.8
E	105 846	119 877	13.3	678.931	663.159	-2.3
F	93 433	74 494	-20.3	509.513	545.230	7.0
I	90 070	101 025	12.2	190.609	230.706	21.0
L	871	601	-31.0	1.351	1.348	-0.2
A		32 030			48.496	
P	155 604	120 898	-22.3	99.040	117.018	18.2
EU-15	552 086	541 638	-1.9	1594.772	1723.861	8.1

Other wines						
	Number of holdings			Area under vines (1000 ha)		
	1989	1999	Variation (%)	1989	1999	Variation (%)
EL	198 415	107 811	-45.7	60.847	37.207	-38.9
E	269 030	207 457	-22.9	730.869	481.195	-34.2
F	101 583	55 124	-45.7	389.986	319.248	-18.1
I	778 380	437 475	-43.8	643.544	405.956	-36.9
P	238 100	141 093	-40.7	156.193	87.985	-43.7
UK		372			0.874	
EU-15	1 585 508	949 332	-40.1	1981.439	1332.466	-32.8

Table grapes						
	Number of holdings			Area under vines (1000 ha)		
	1989	1999	Variation (%)	1989	1999	Variation (%)
EL	41 066	20 283	-50.6	18.276	12.937	-29.2
E	25 993	23 318	-10.3	57.290	29.209	-49.0
F	12 574	5 590	-55.5	18.160	9.224	-49.2
I	47 348	27 642	-41.6	66.706	39.582	-40.7
P	6 330	5 010	-20.9	8.621	5.155	-40.2
EU-15	133 311	81 843	-38.6	169.053	96.107	-43.1

Source: Eurostat basic vineyard survey 1989-1999

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Methodology of the vineyard survey

The main purpose of the vineyard survey is to provide the Commission with the information needed to perform the tasks entrusted to it in carrying out Council Regulation (EC) No 1493/1999 of 17 May 1999 on the common organisation of the market in wine.

The procedure for the statistical observation of areas under vines concerns Member States where the total area of vines cultivated in the open air is not less than 500 hectares (Germany, Greece, Spain, France, Italy, Luxembourg, Austria, Portugal and the United Kingdom). It involves two operations:

- every ten years, the Member States in question conduct surveys of areas under vines (the first basic survey was carried out in 1979);
- every year, from the second year after the basic survey, the Member States provide information on changes to areas producing wine grape varieties.

The basic surveys cover all holdings with a cultivated area areas under vines normally intended for production for sale of wine grapes, grapes for drying, wine must or vegetative propagation material for vines.

The following characteristic are surveyed:

- 1 - utilised agricultural area;
- 2 - area under vines, broken down by normal use of production into:
 - a) area producing wine grapes, subdivided into:
 - * quality wines psr;
 - * other wines, including wines compulsorily intended for the manufacture of certain potable spirits with a registered designation of origin;
 - b) area producing table grape varieties;
 - c) area planted with root-stock for future grafting;
 - d) area cultivated solely for the production of vegetative propagation material for vines subdivided into:
 - * nurseries;
 - * parent wines for root-stock;
 - e) area producing varieties for the production of grapes for drying.

Areas producing wine grapes must be broken down by variety (grouped by red or white type) and year of planting.

The surveys may be conducted exhaustively or by random sampling. In the latter case, the sampling error must not exceed 1%.

Methodology of the compilation of the wine balance

Wine production statistics are governed by Commission Regulation (EC) No 1282/2001 of 28 June 2001. This Regulation lays down the rules for compiling and transmitting the information needed to identify wine products and to monitor the wine market. This information is used to track the uses and resources of the main grape-based products consumed in the Member States.

Resources comprise:

- usable production, i.e. production of wine and of must intended for the production of wine;
- bulk and bottled imports, broken down by non-member country of consignment;
- available stocks at start of marketing year;

Uses comprise:

- exports, broken down as for imports;
- internal use;
- available stocks at end of marketing year;

Internal use is broken down into:

- human consumption;
- industrial uses (distillation, vinegar production);
- processing (manufacture of flavoured vermouths and wines).

Further information:

➤ Databases

NewCronos, Theme 5

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Pierre Bruyas, Eurostat/F2, L-2920 Luxembourg, Tel. (352) 4301 32477, Fax (352) 4301 37318,

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