



# Wine Situation

USDA/Foreign Agricultural Service  
Horticultural and Tropical Products Division

# Key Facts: U.S. Wine Industry

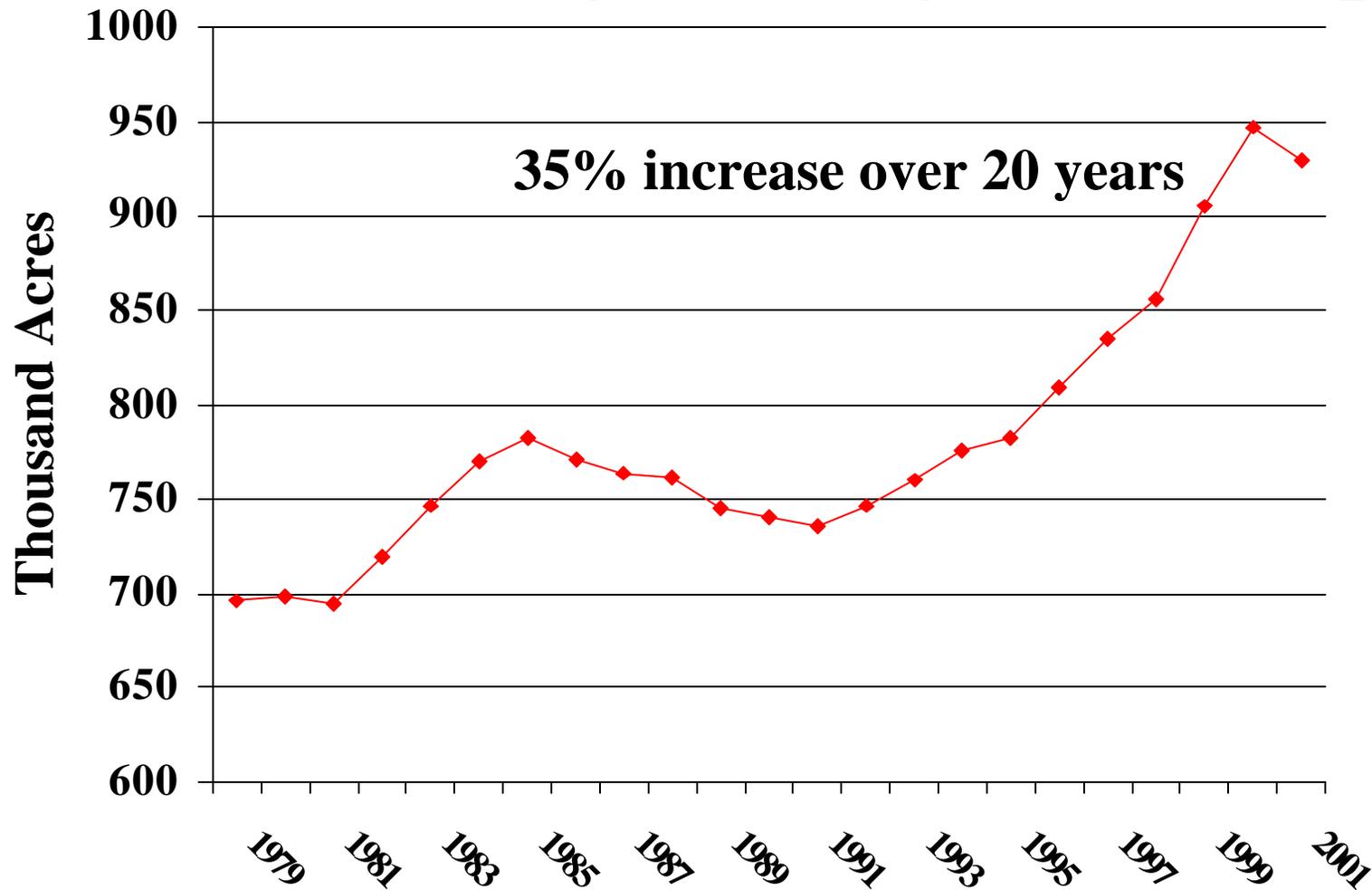
- California accounts for 90 percent of U.S. wine production; New York (4 percent) and the Pacific Northwest States of Washington, Oregon, and Idaho collectively account for approximately 3 percent .
- Commercial wine production occurs in 48 of the 50 states (excluding Alaska and North Dakota). All states in the Union now have at least one bonded winery.

# Key Facts: U.S. Wine Industry

(Continued)

- The United States is the fourth largest wine producing country, leading the New World Countries at approximately 20 million hl in 2001.
- In 2001, U.S. wine exports accounted for nearly 3 million hl or approximately 15 percent of production.

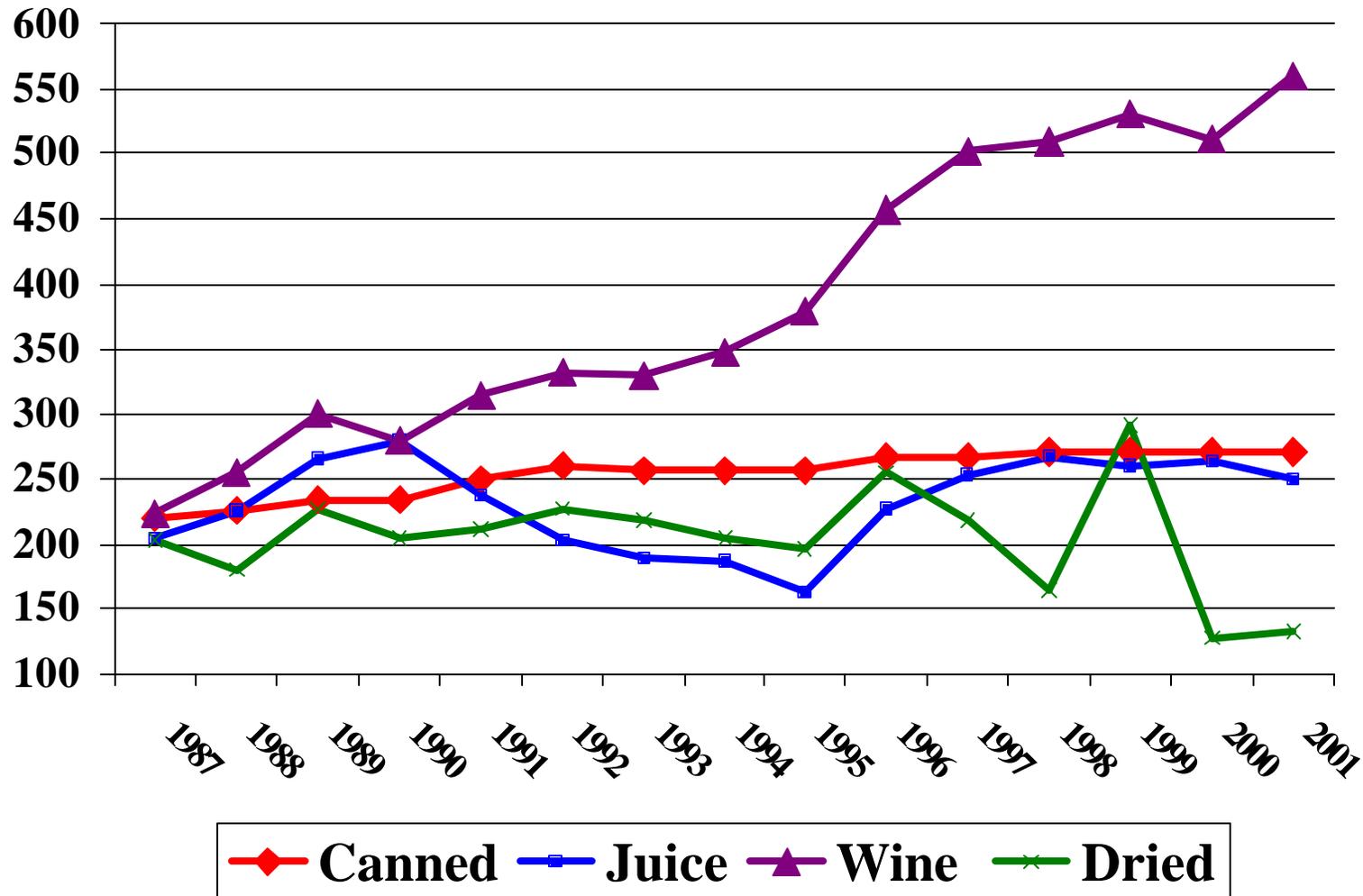
# U.S. Bearing Acreage for Grapes



Source: National Agricultural Statistics Service, USDA

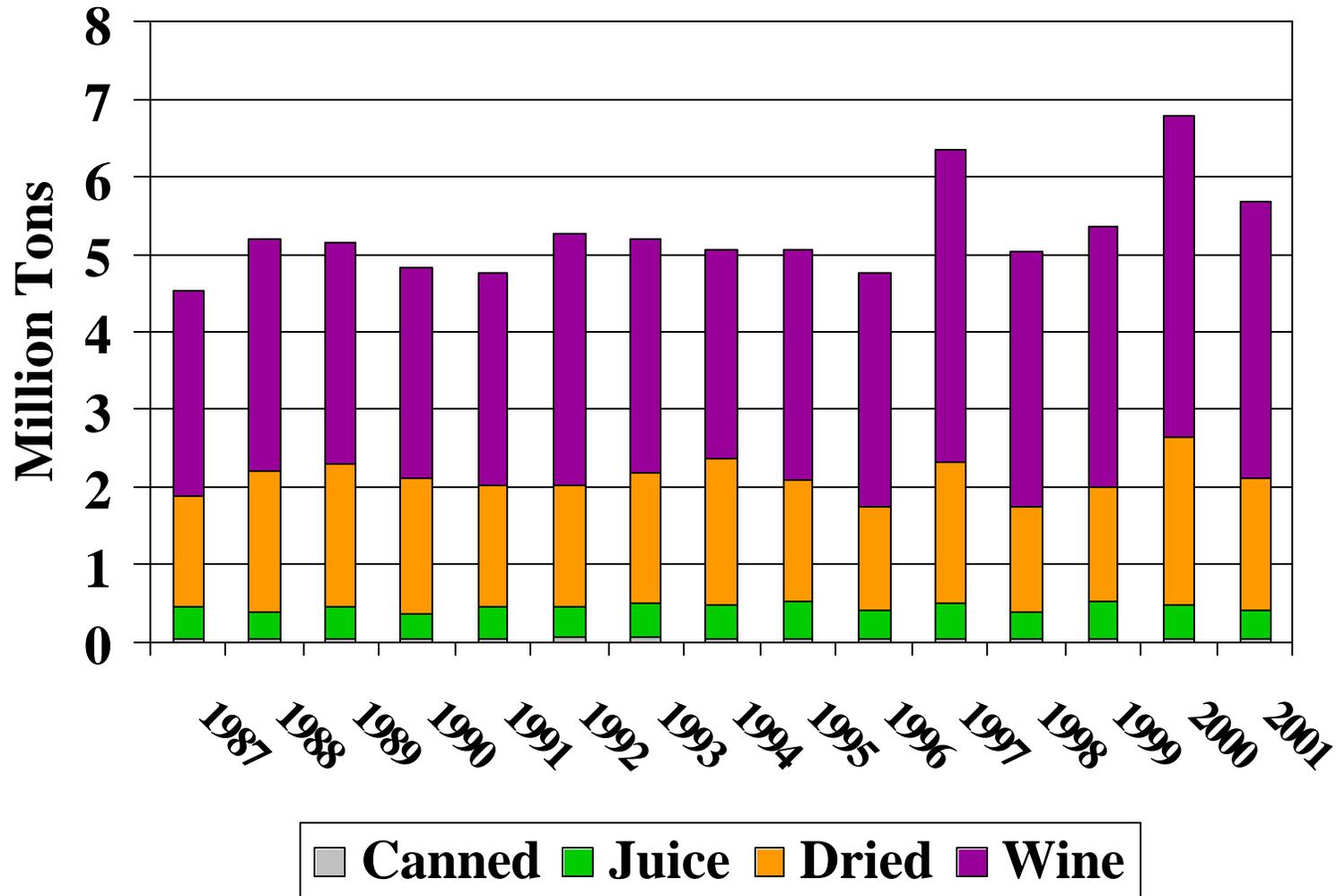
# U.S. Grapes: Season Average Grower Prices

(Dollars per Ton)



Source: National Agricultural Statistics Service, USDA

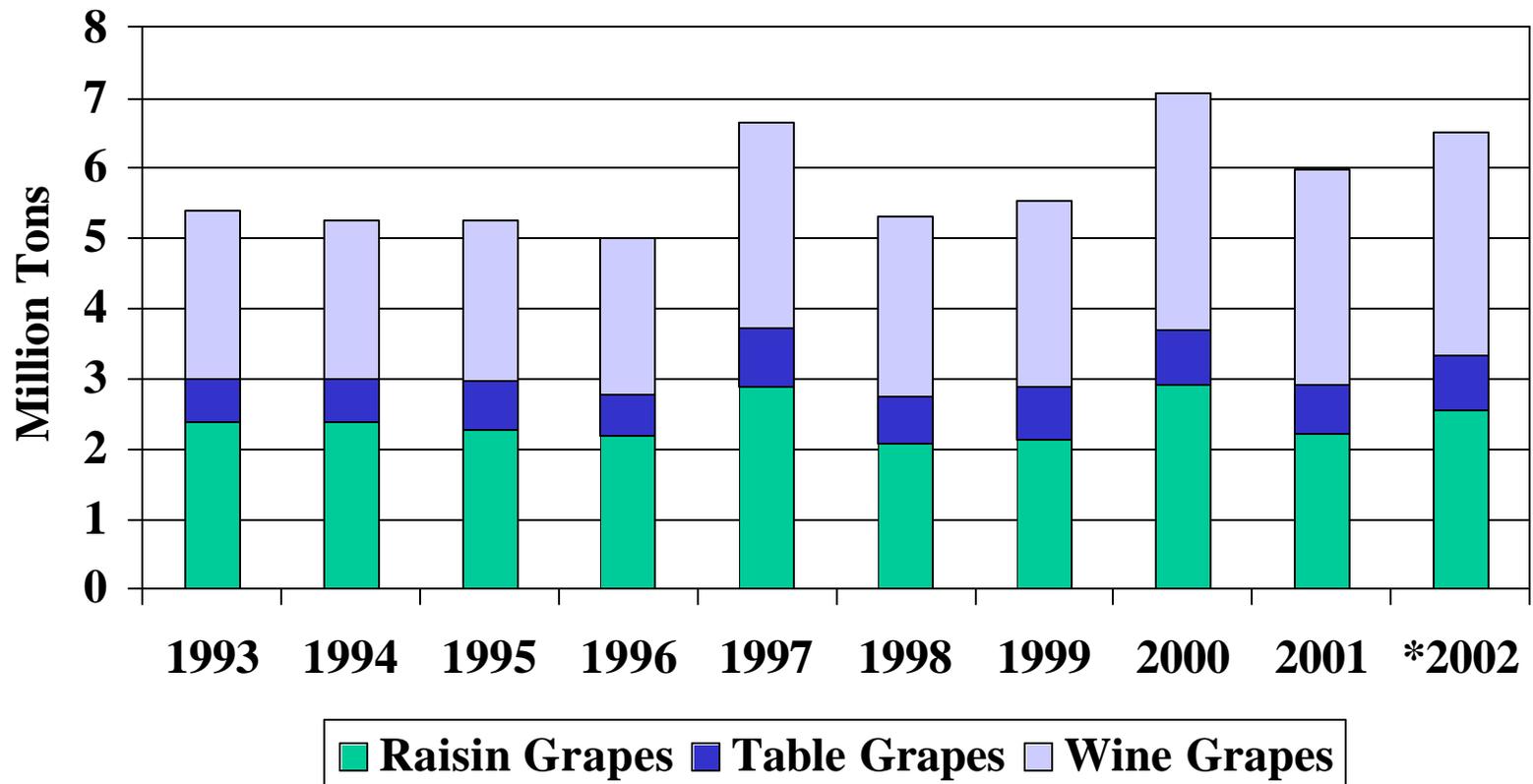
# U.S. Grapes: Processed Utilization



Source: National Agricultural Statistics Service, USDA

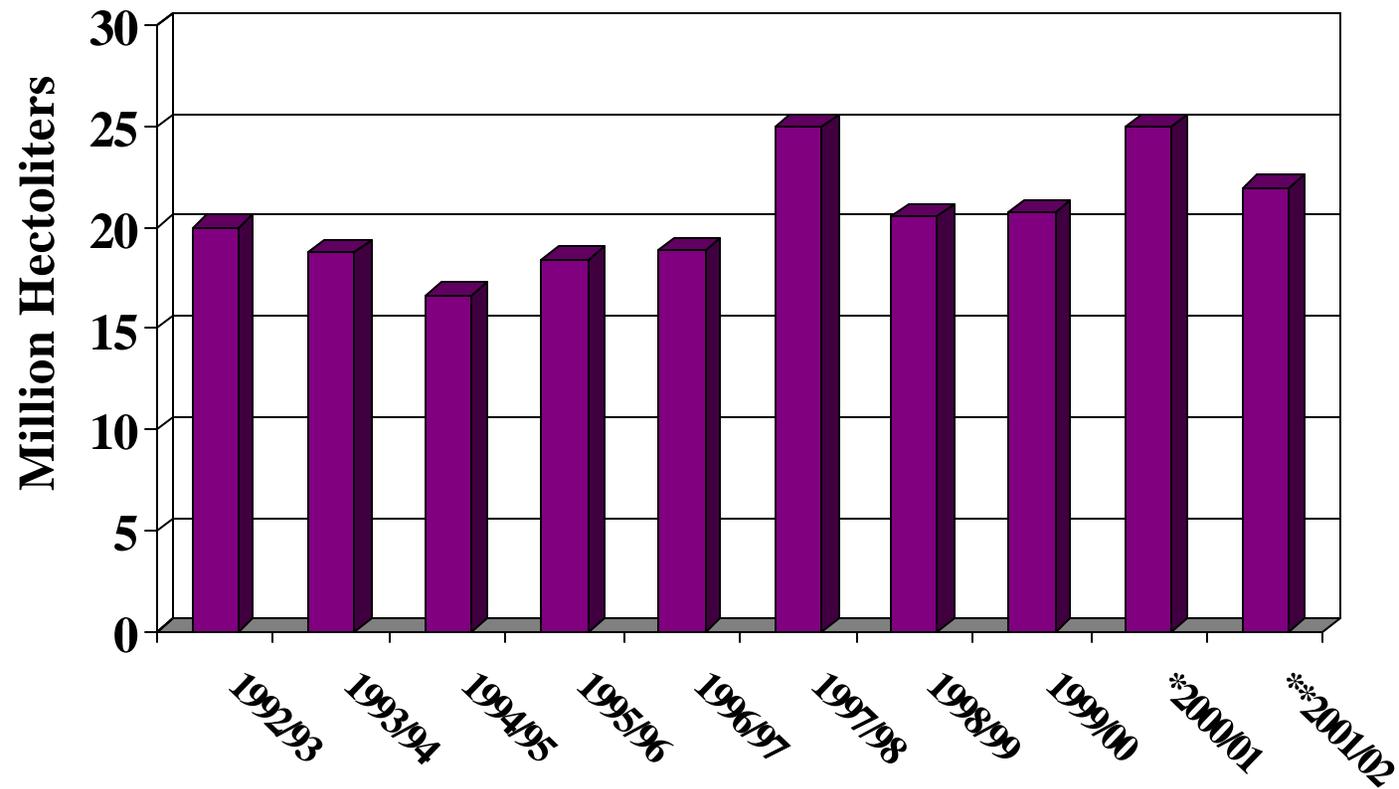
# California Grape Production

*(91 Percent of U.S. Grape Production)*



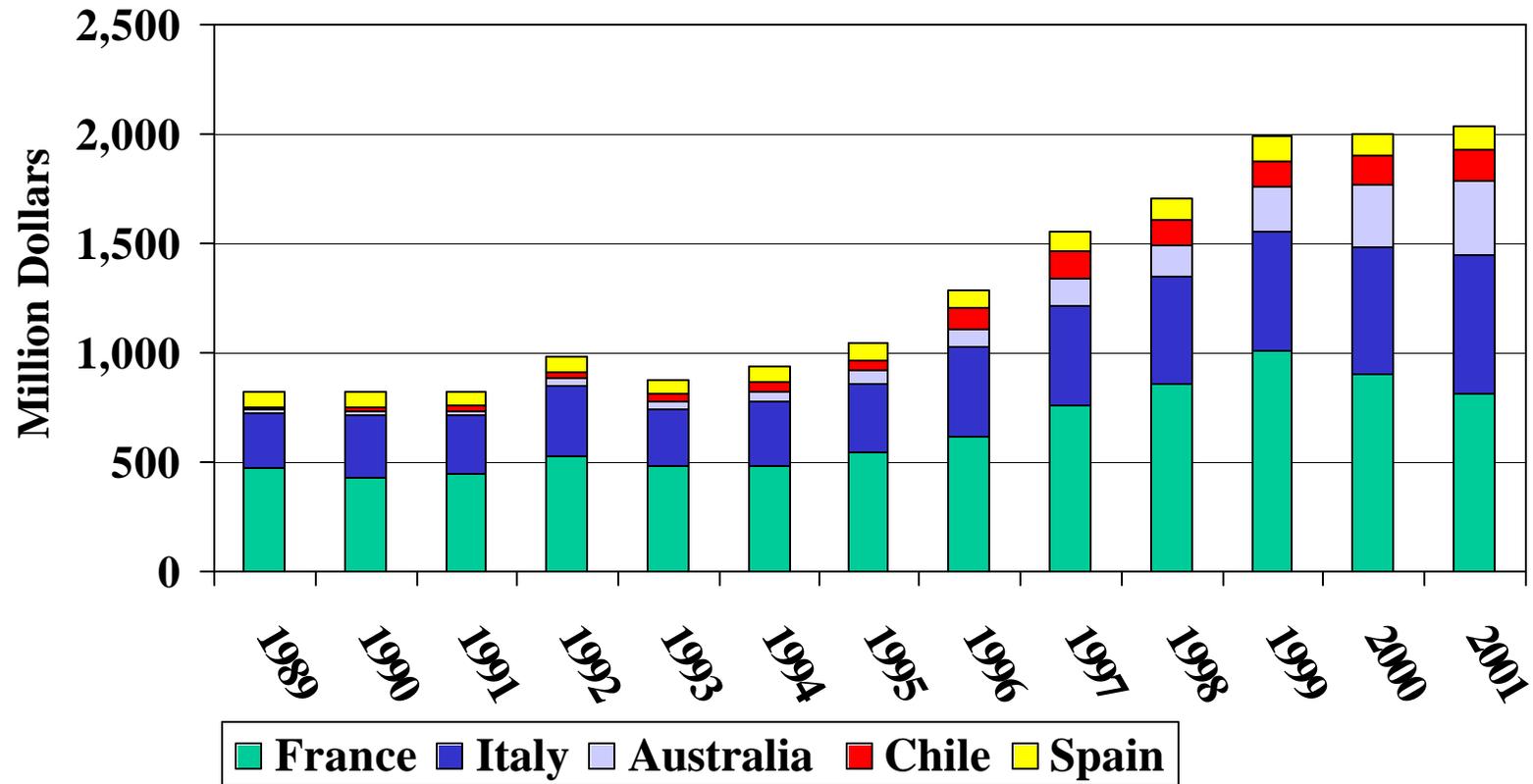
Source: National Agricultural Statistics Service, USDA

# U.S. Domestic Wine Production



August – July Marketing Year

# U.S. Wine Imports



Source: U.S. Department of Commerce, Bureau of the Census

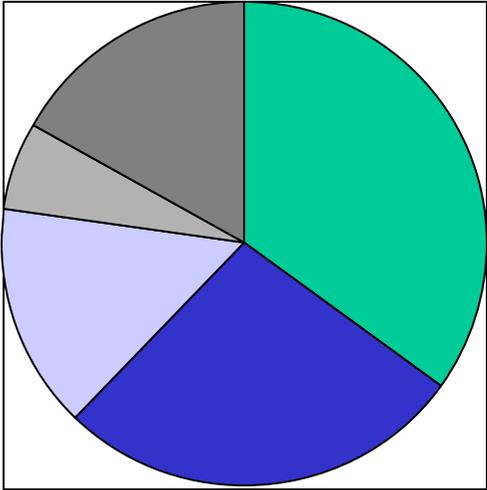
# Top Ten Imports in the U.S. 2001

Brand	Country of Origin	Cases (000)	Percent Change
Concha y Toro	Chile	2.065	+4.8
Riunite	Italy	1.775	-1.4
Lindemans	Australia	1.575	+12.5
Rosemount Estates	Australia	1.440	+16.1
Casarsa	Italy	1.285	+6.2
Bolla	Italy	1.180	+7.8
Georges Deboeuf	France	1.175	+0.2
Cavit	Italy	1.050	+31.3
Ecco Domani	Italy	.925	+14.9
Walnut Crest	Chile	.870	-3.3

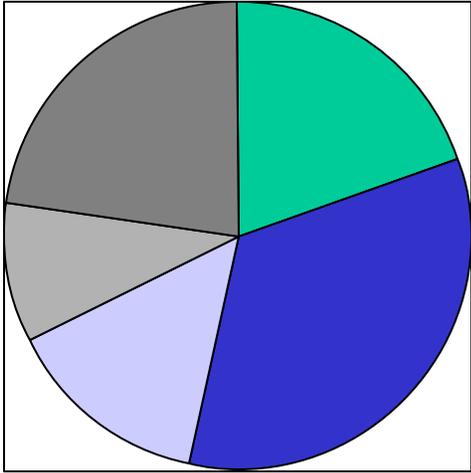
Source: Impacts 2002 U.S. Wine Market Study

# Major U.S. Wine Suppliers

**Value**

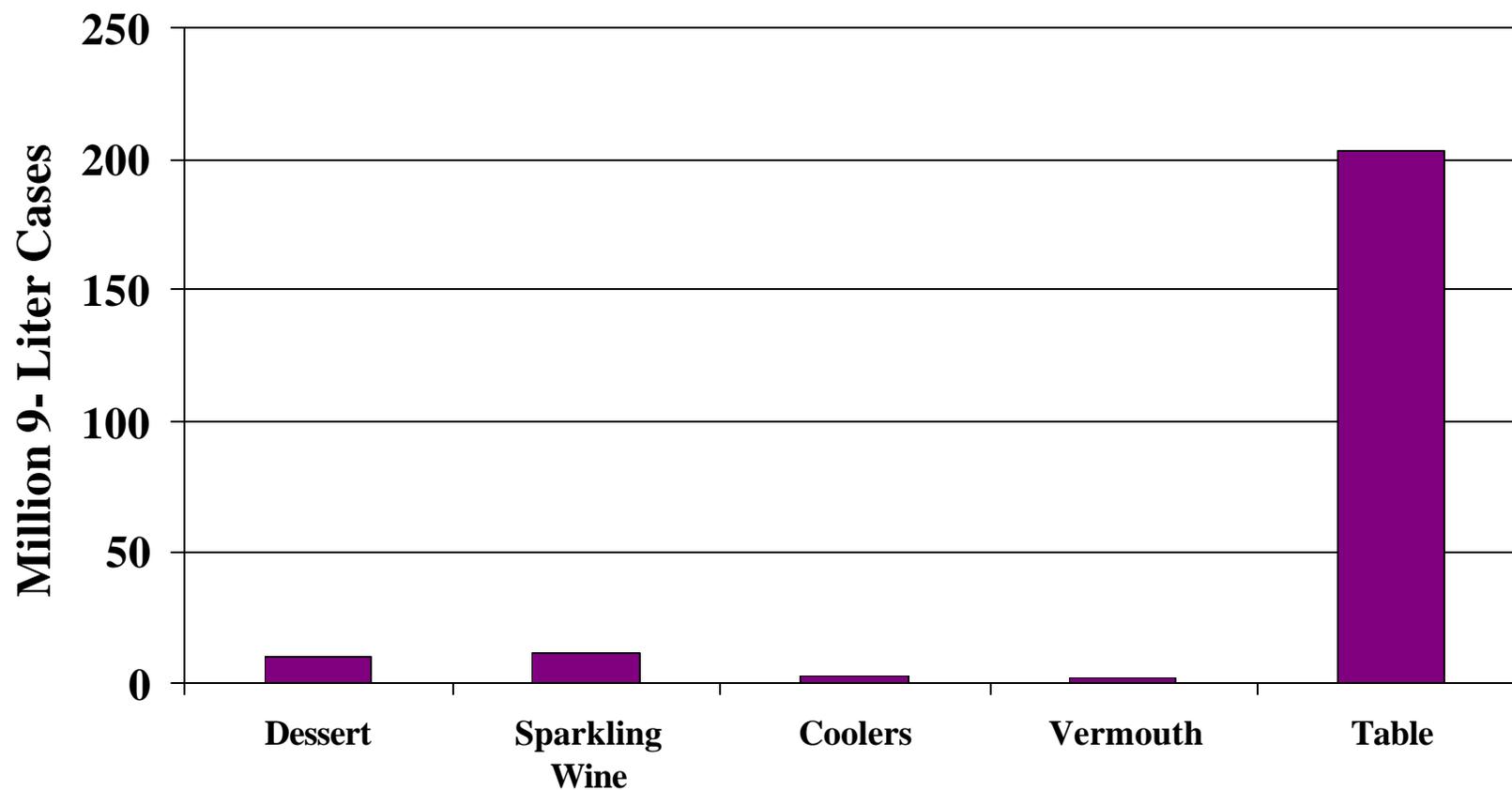


**Volume**



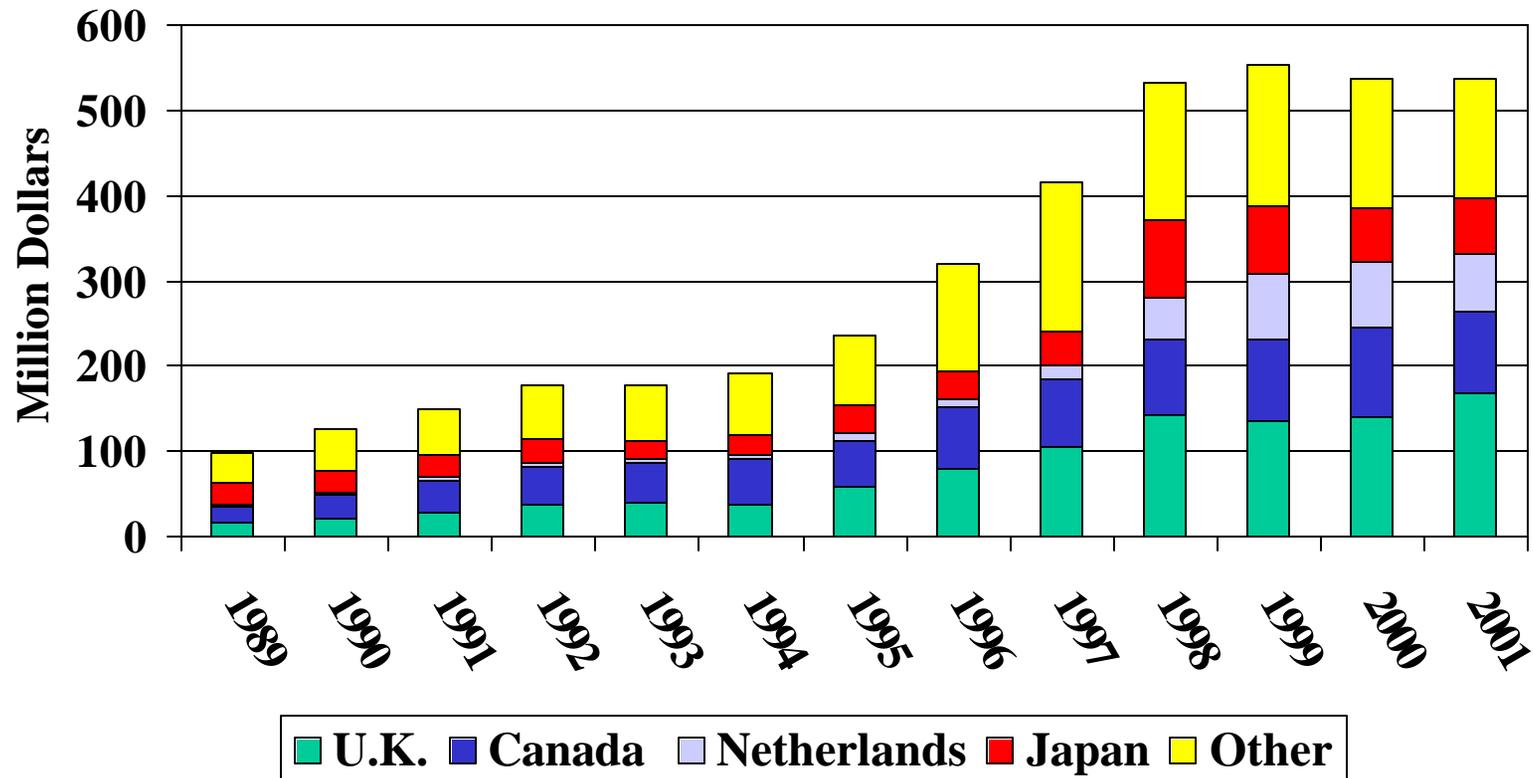
Source: U.S. Department of Commerce, Bureau of the Census

# U.S. Wine Consumption By Category 2000



Source: Adams Handbook

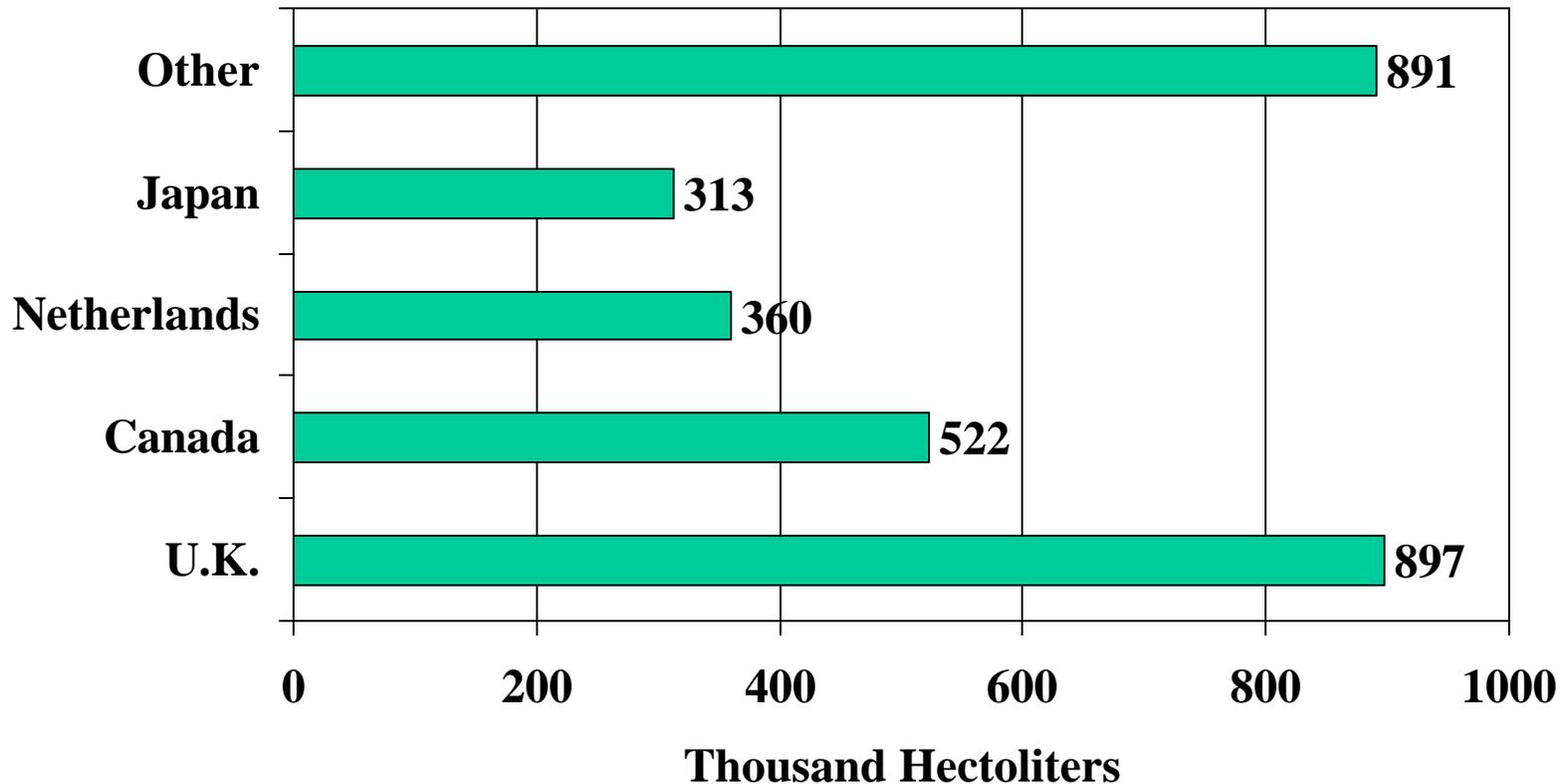
# U.S. Wine Exports



Source: U.S. Department of Commerce, Bureau of the Census

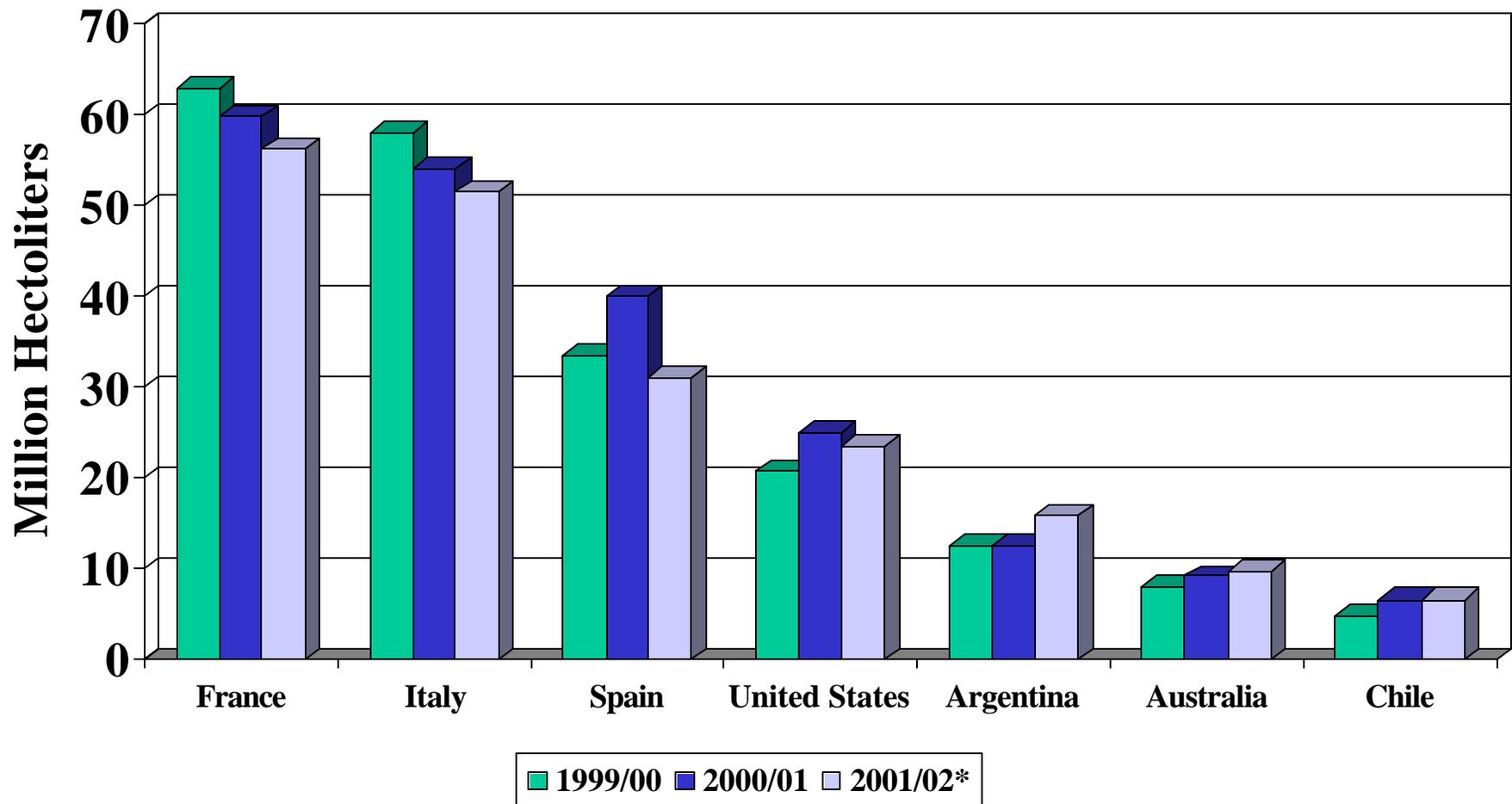
# Export Destinations for U.S. Wine

*Volume Terms - 2001*



# World Wine Producers

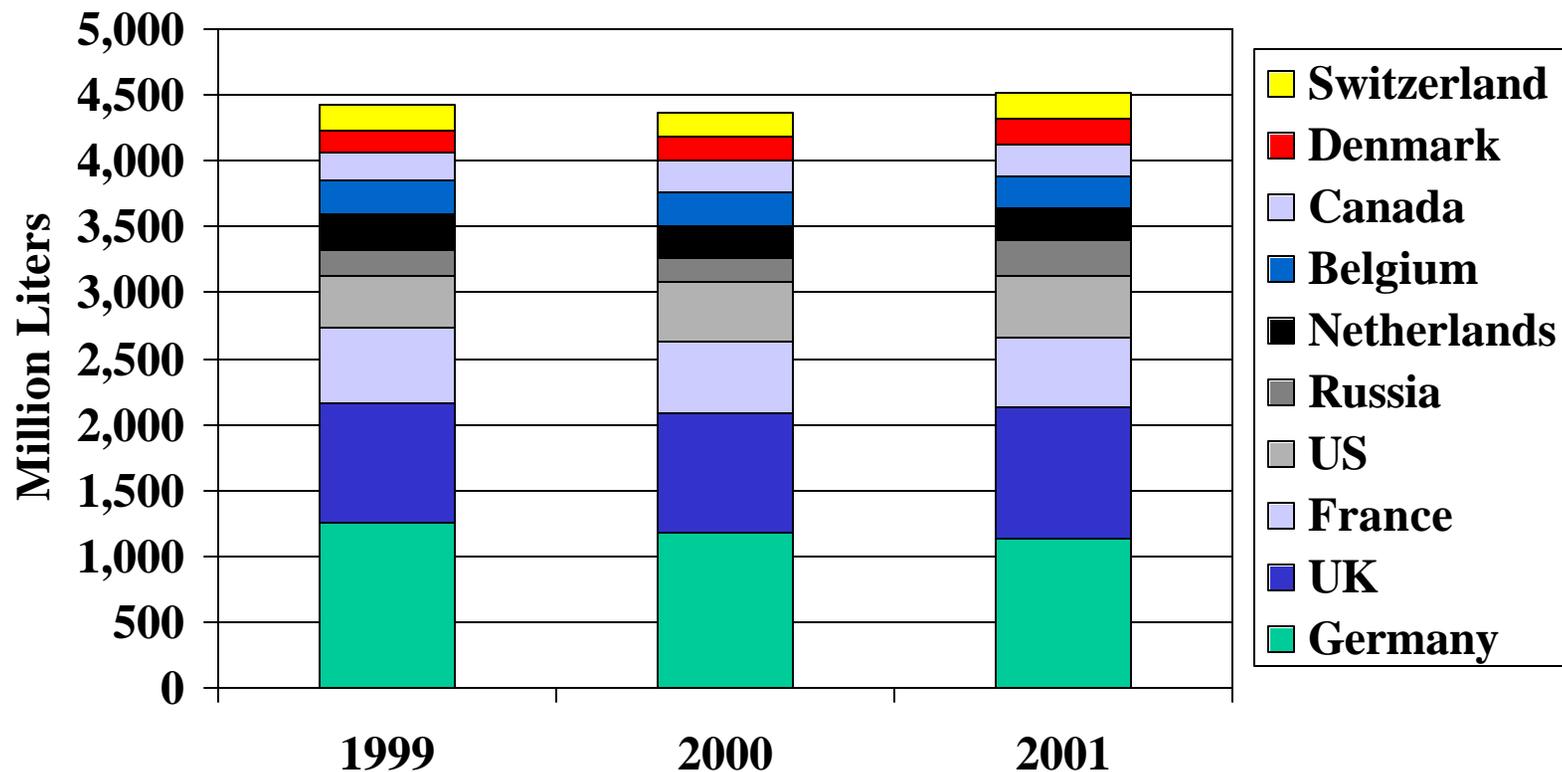
*September – August Marketing Year*



Source: U.S. Department of Agriculture, FAS Attaché Annual Reports

# World Wine Imports

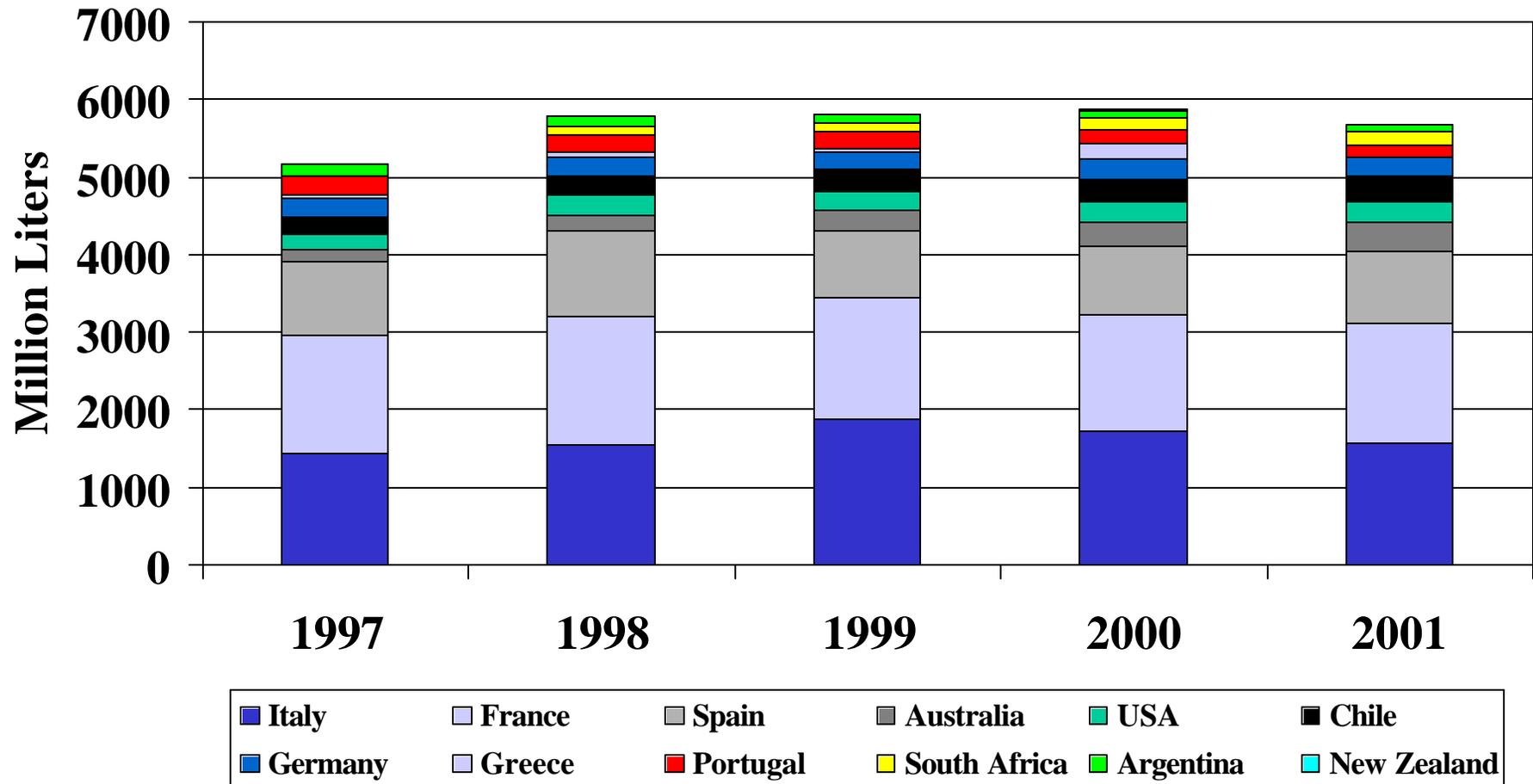
*(Select Countries)*



Source: U.S. Department of Commerce, Bureau of the Census

# World Wine Exporters

## *Select Countries*

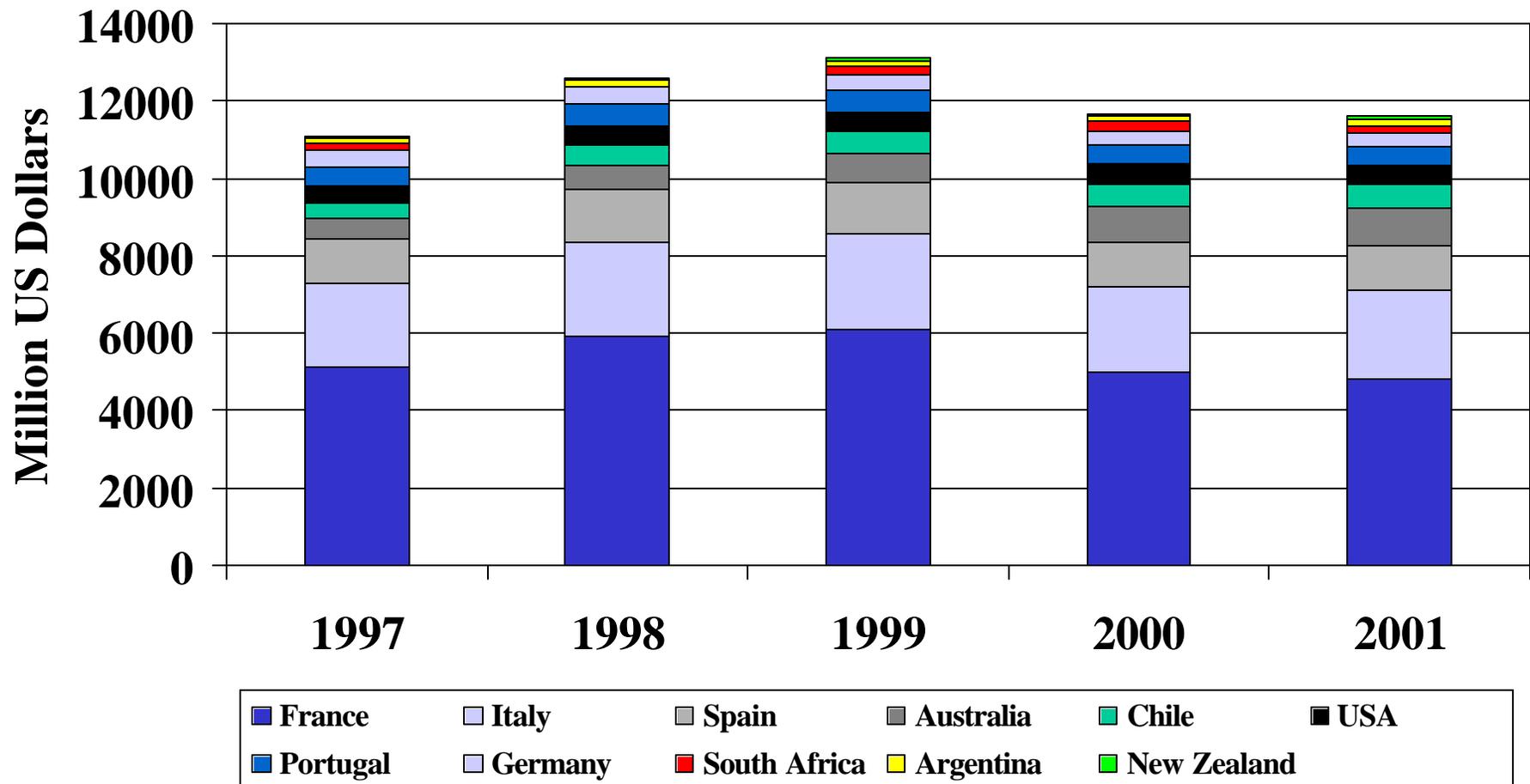


Source: Global Trade Atlas

Wine = (2204) wine of fresh grapes, including fortified wines, grape must

# World Wine Exporters

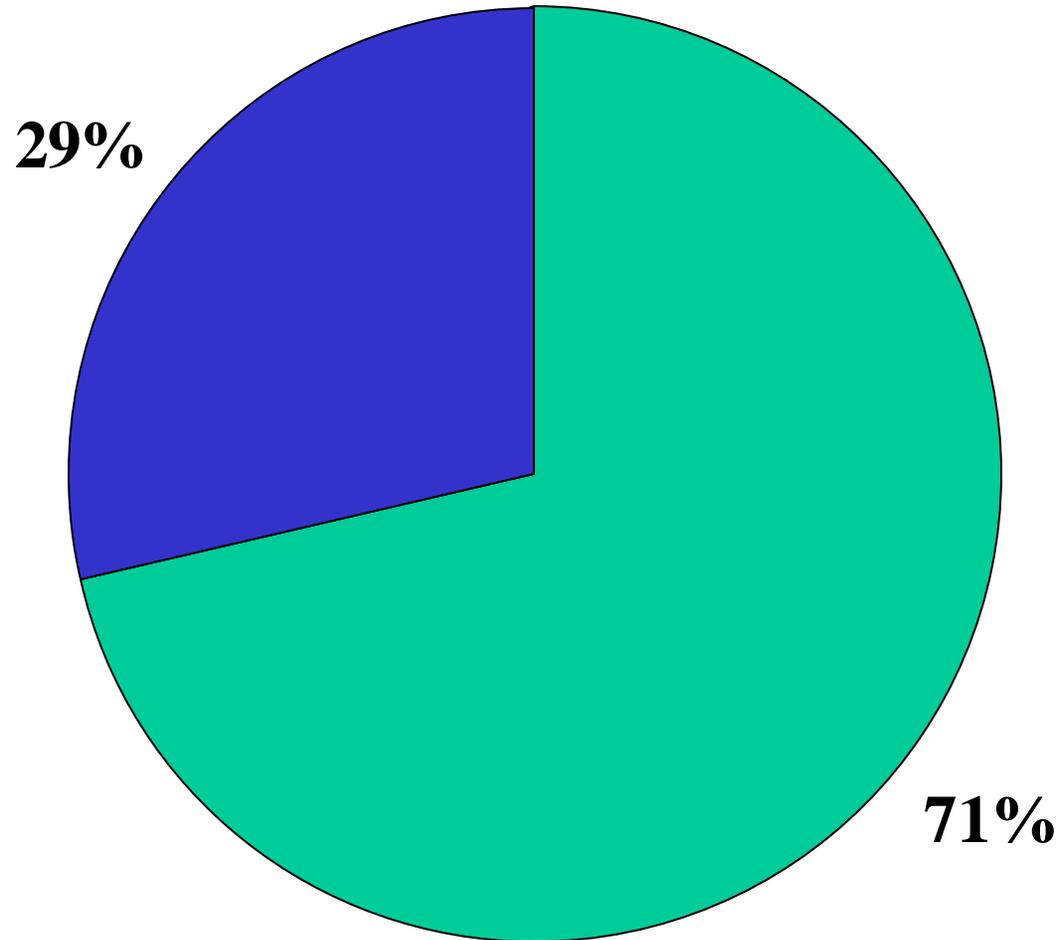
## *Select Countries*



Source: Global Trade Atlas

Wine = (2204) wine of fresh grapes, including fortified wines, grape must

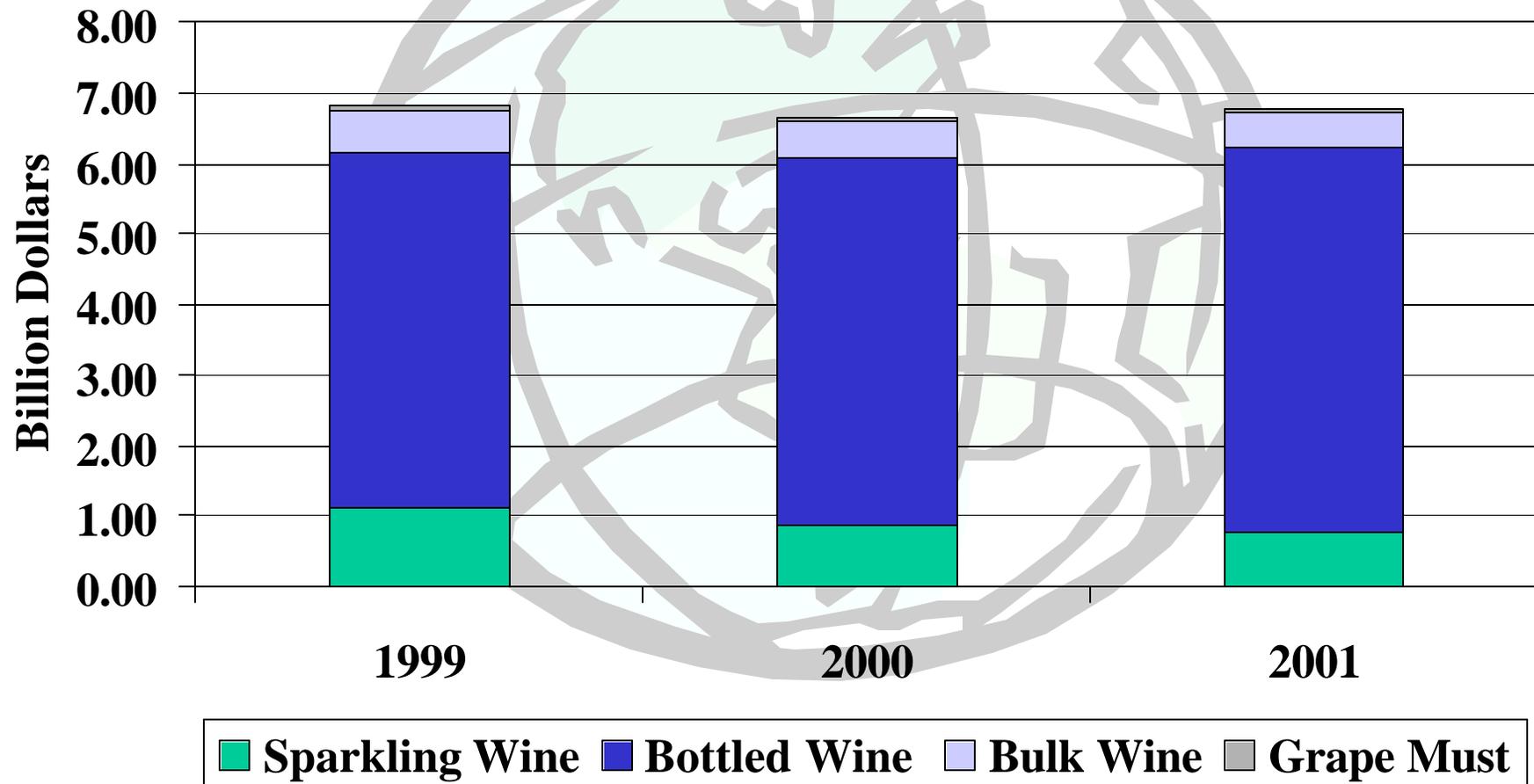
# Total World Wine Trade



 Traditional Old World  WWTG

# Global Trade – Exports by Category

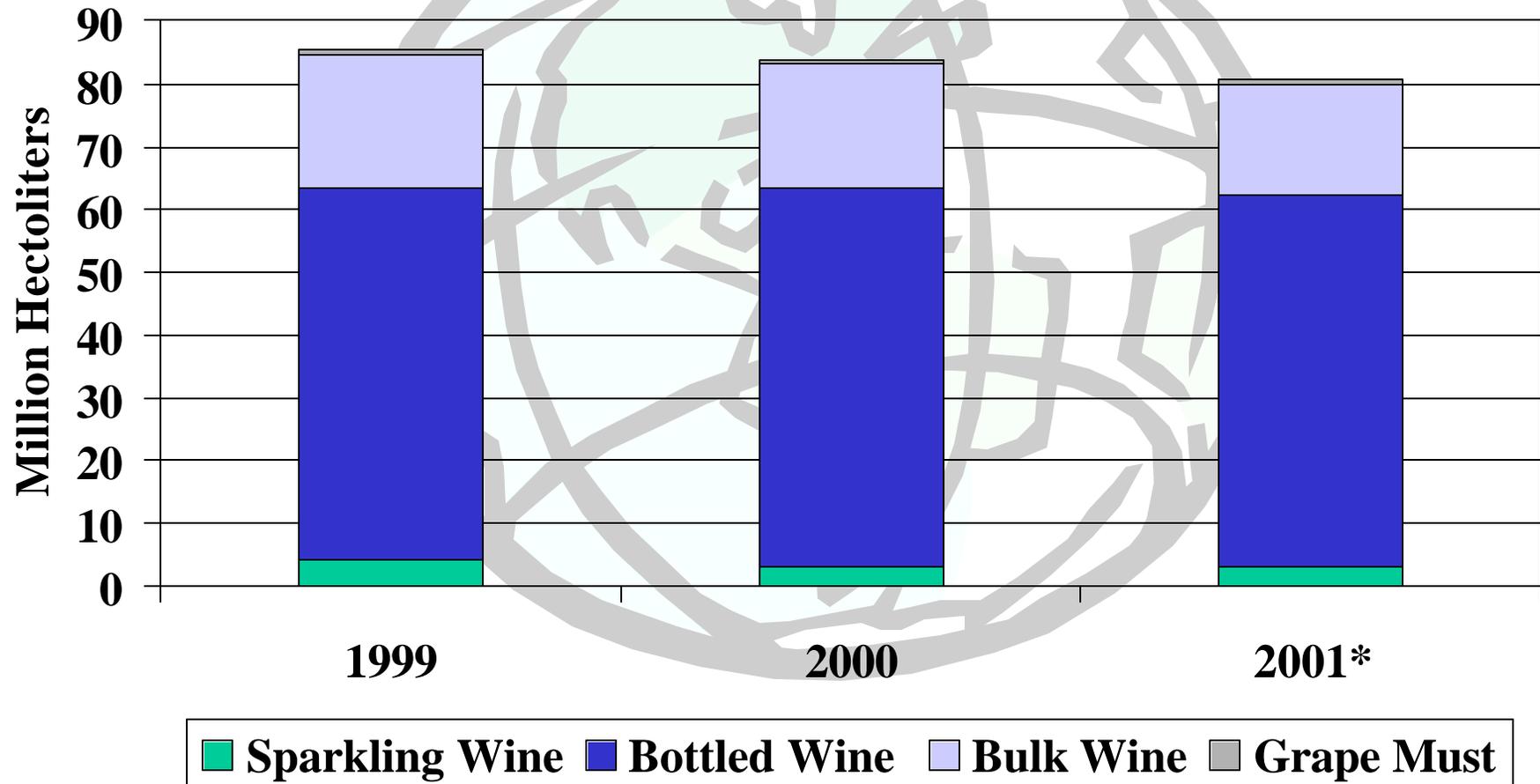
## *By Value*



Source: GLOBAL TRADE ATLAS

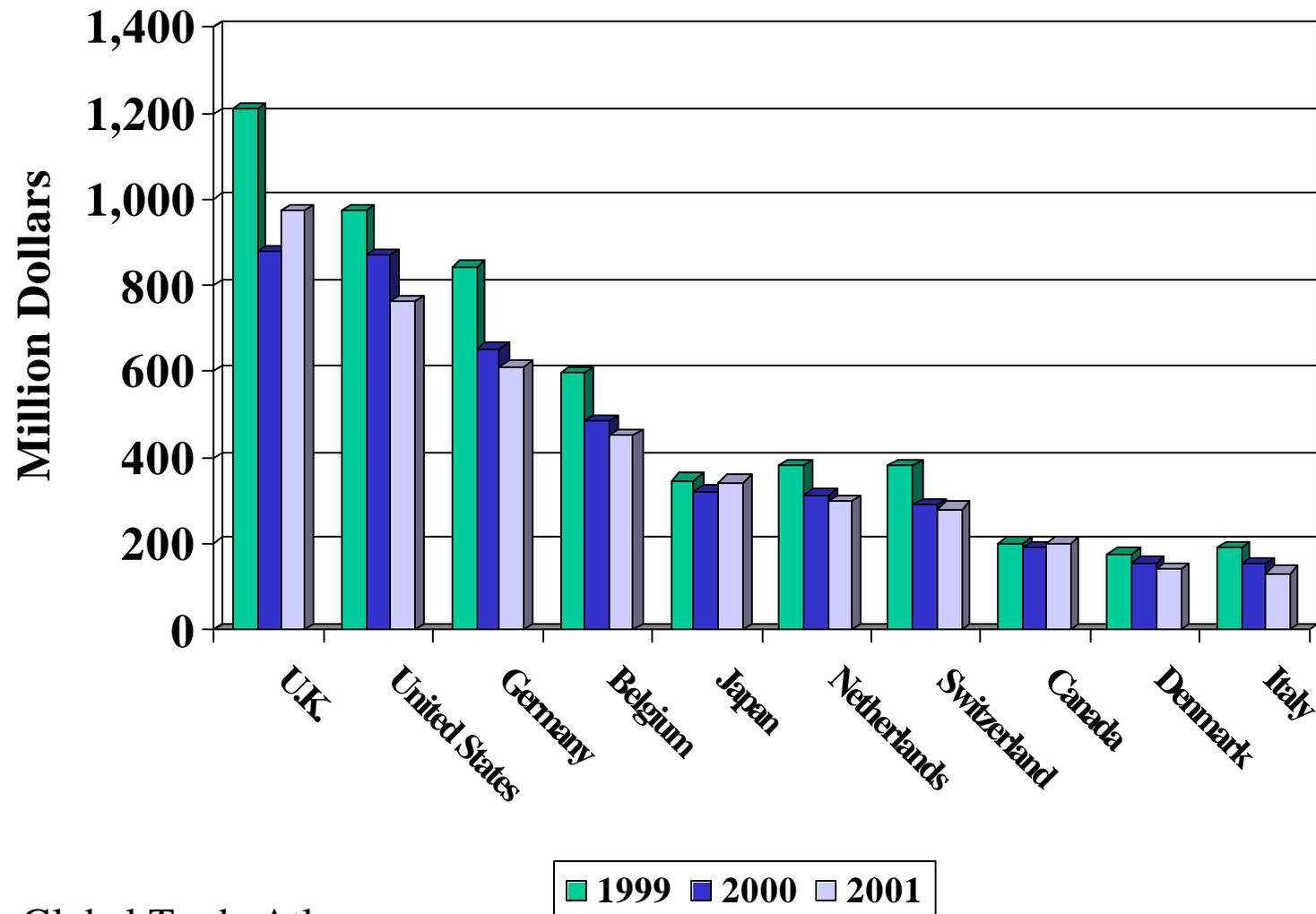
# Global Trade – Exports by Category

## *By Volume*



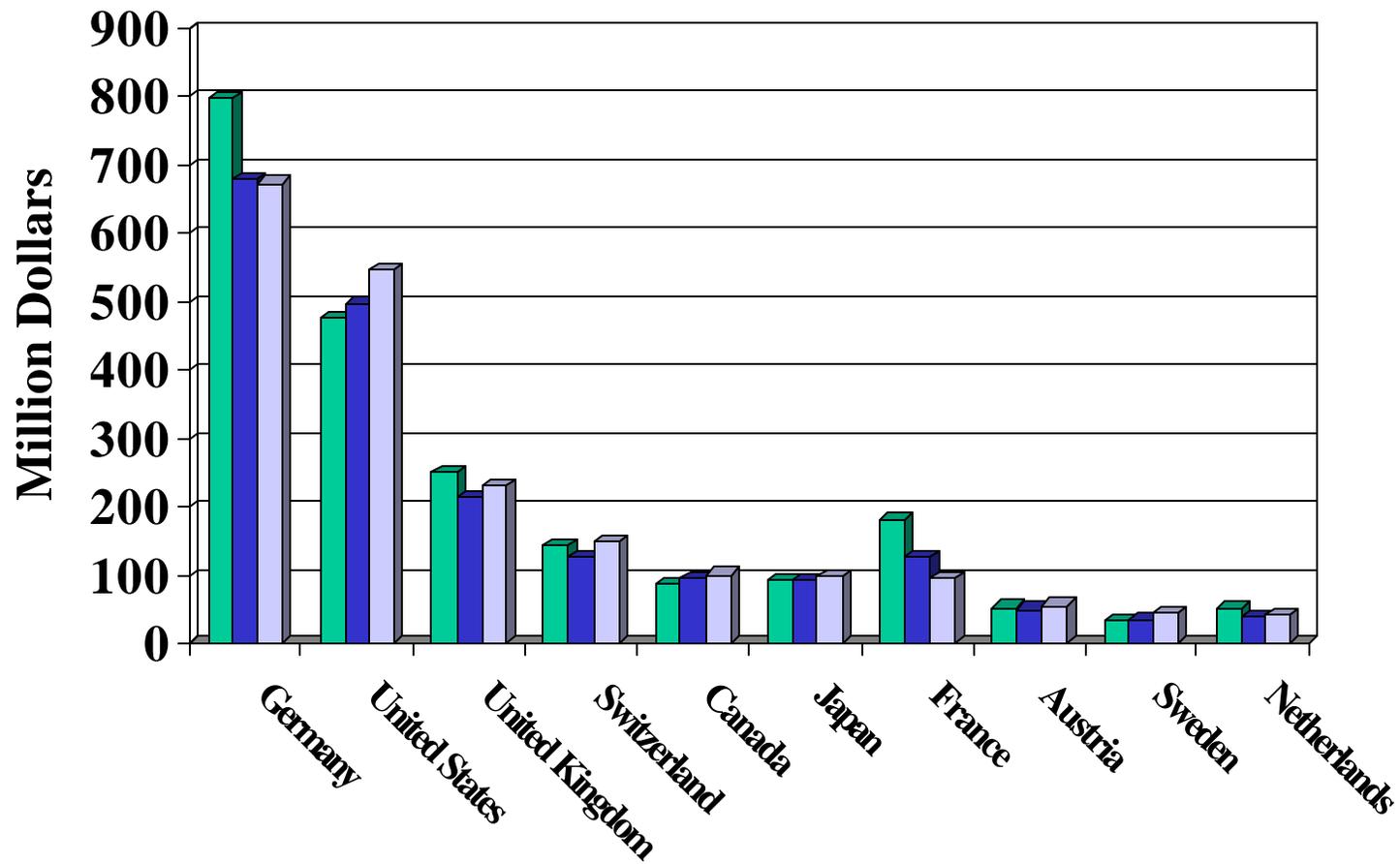
Source: GLOBAL TRADE ATLAS

# France – Wine Export Destinations



Source: Global Trade Atlas

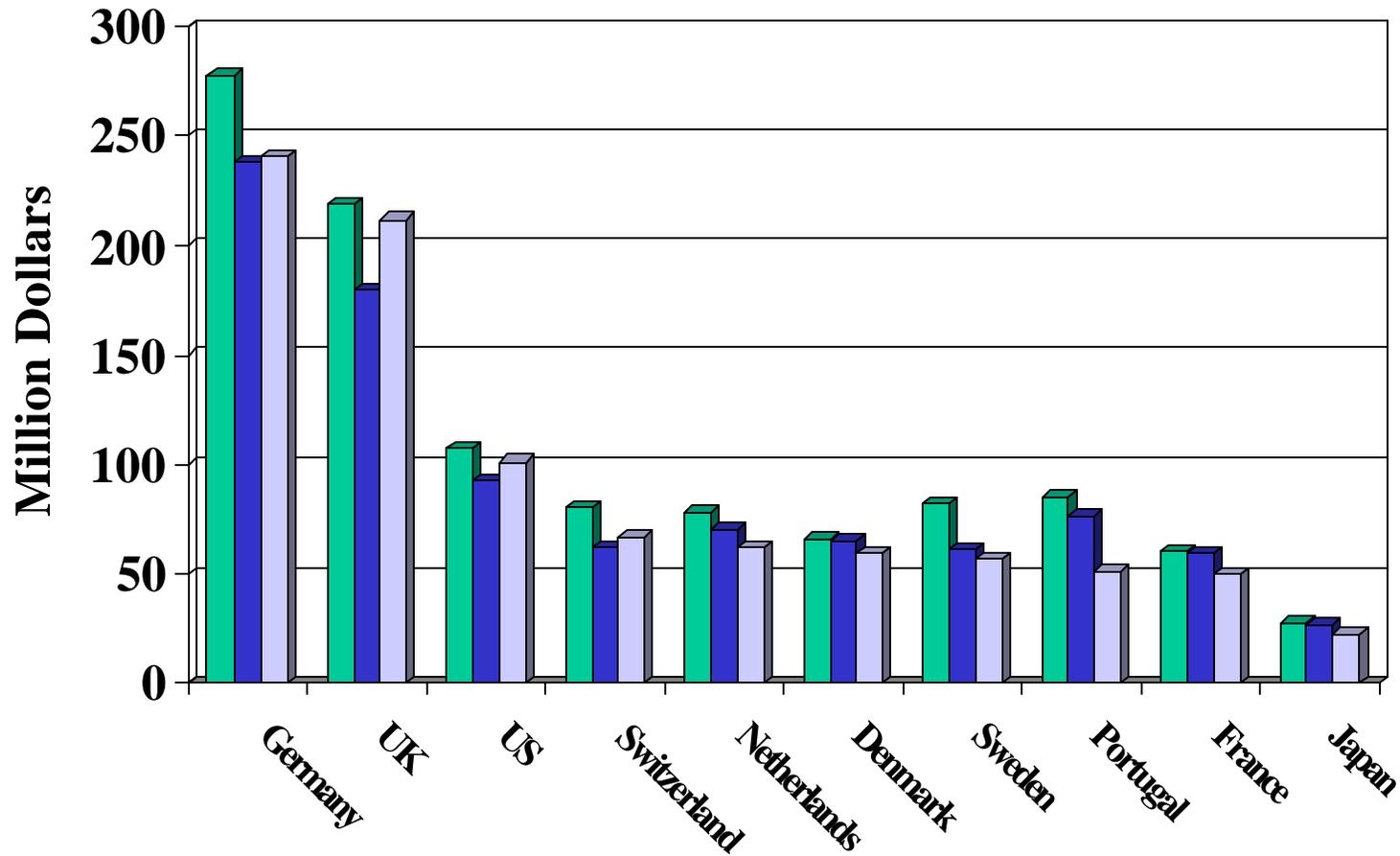
# Italy – Wine Export Destinations



Source: World Trade Atlas

1999 2000 2001

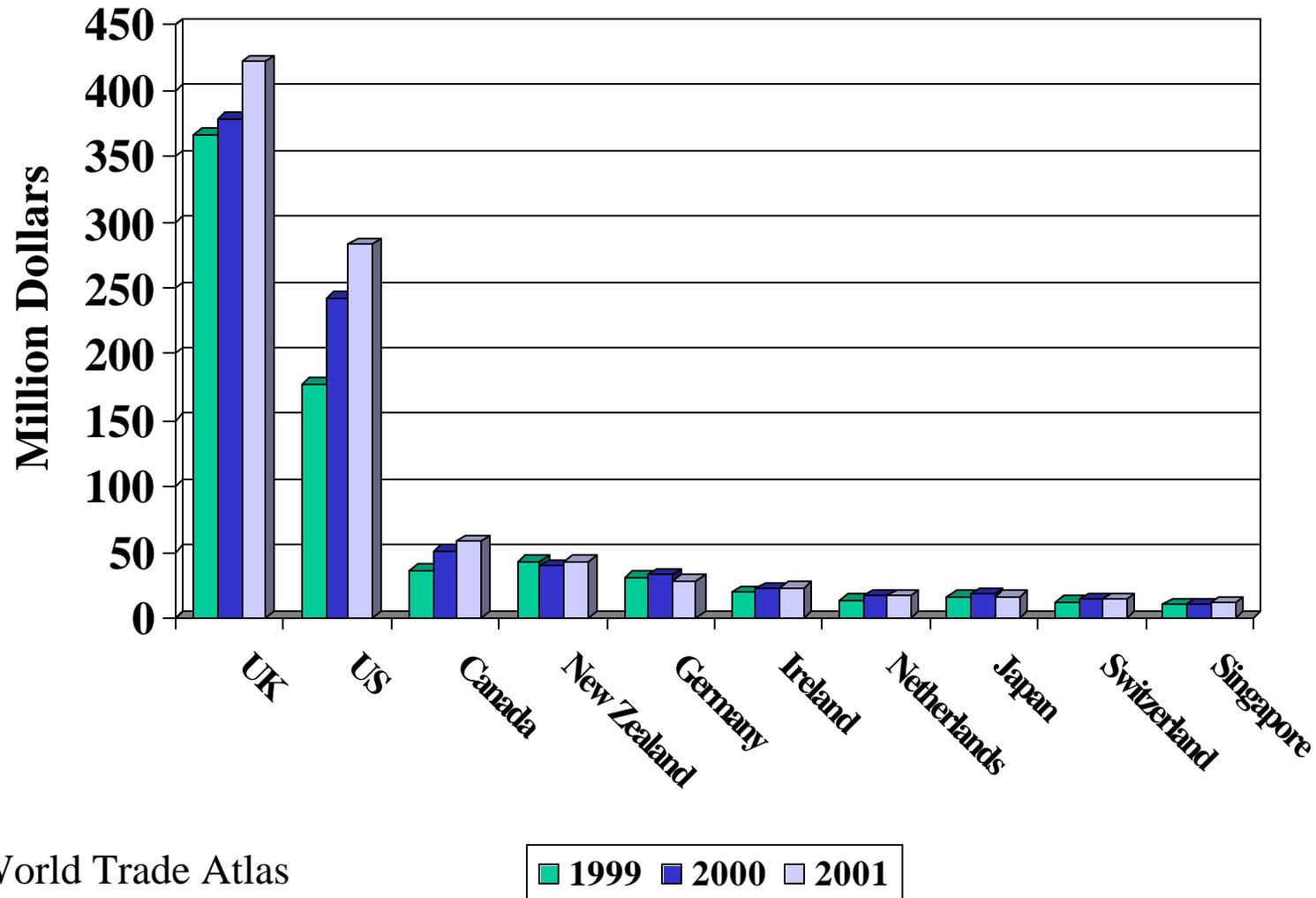
# Spain – Wine Export Destinations



Source: World Trade Atlas

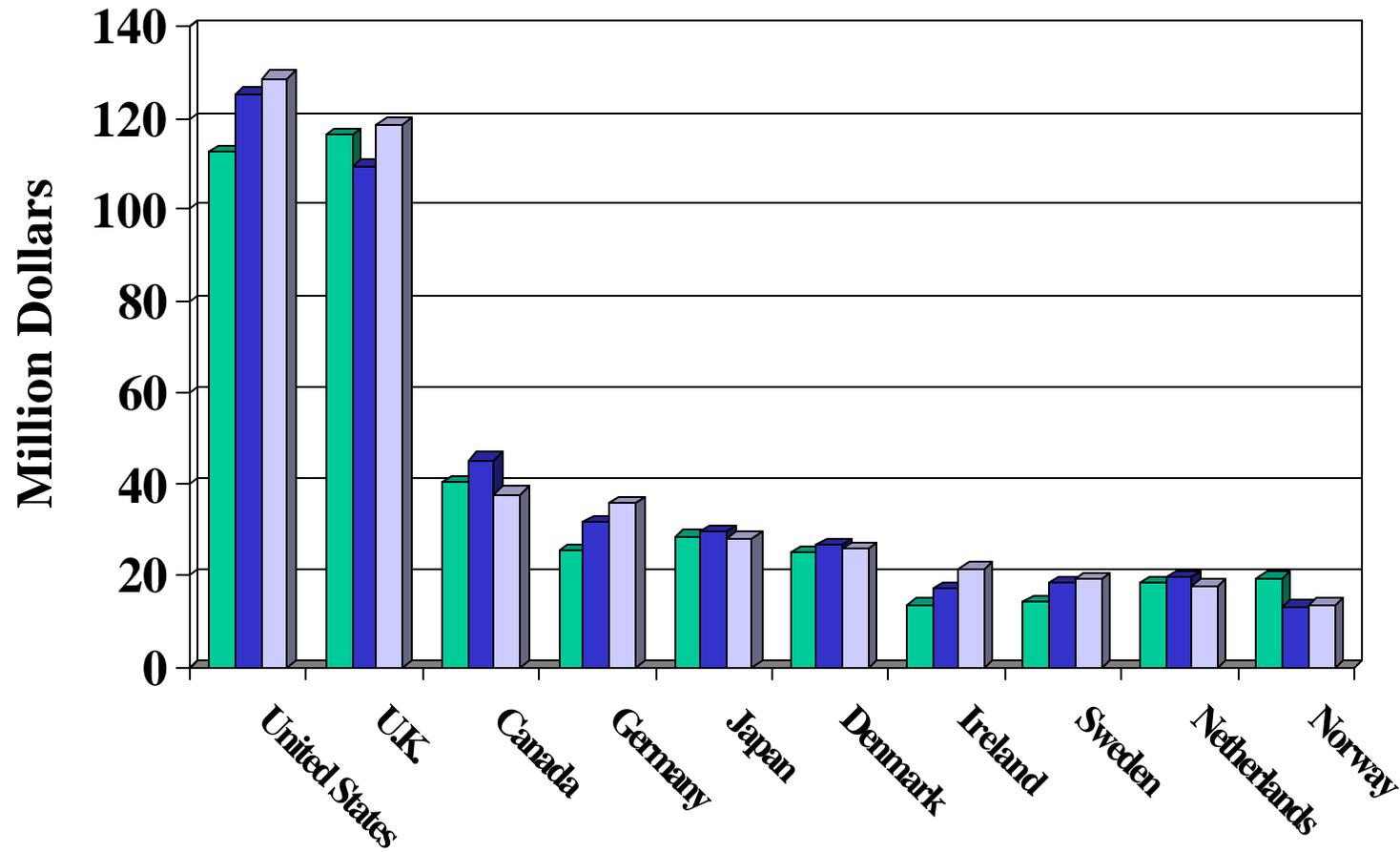


# Australia – Wine Export Destinations



Source: World Trade Atlas

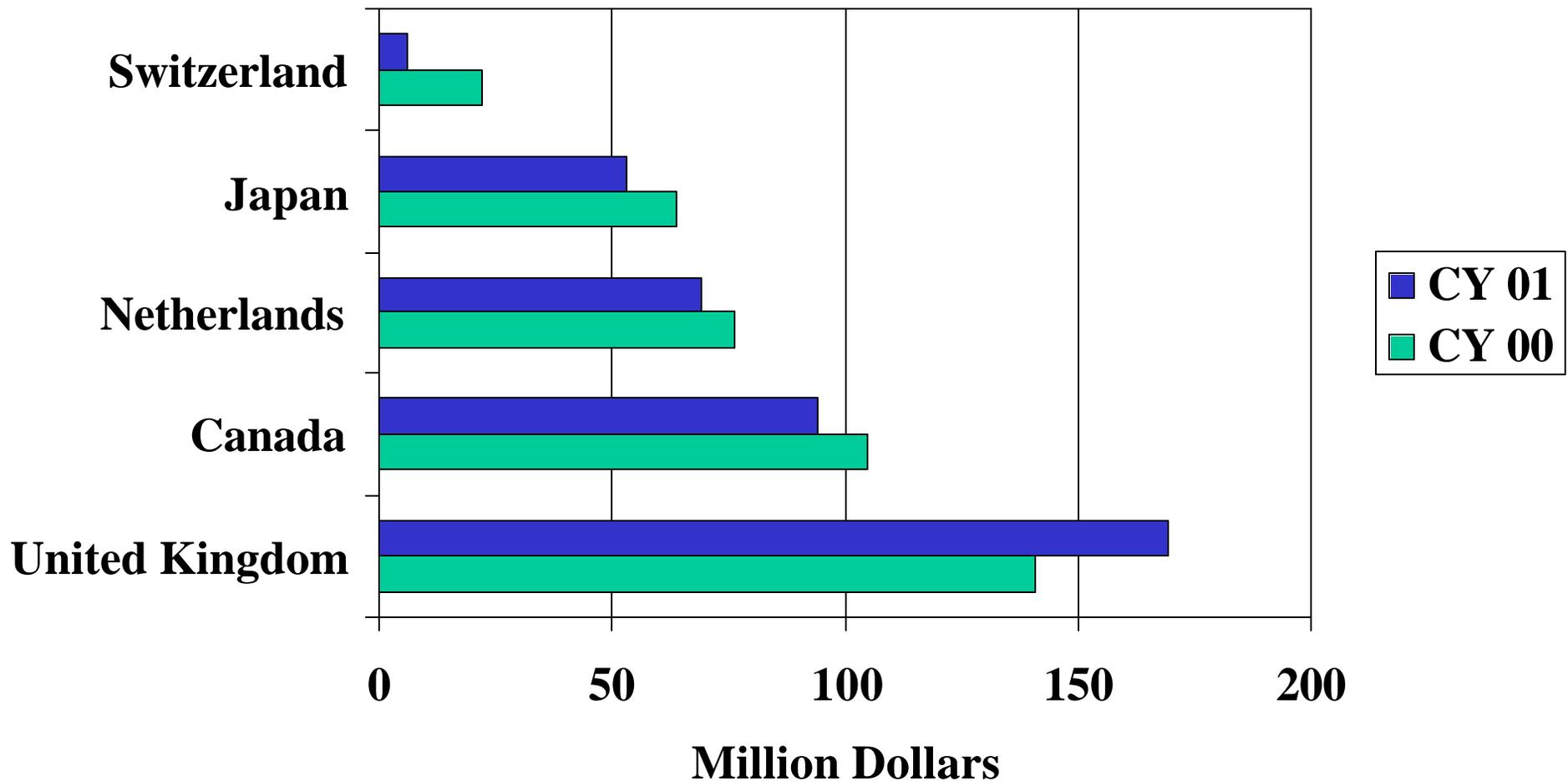
# Chile – Wine Export Destinations



Source: World Trade Atlas

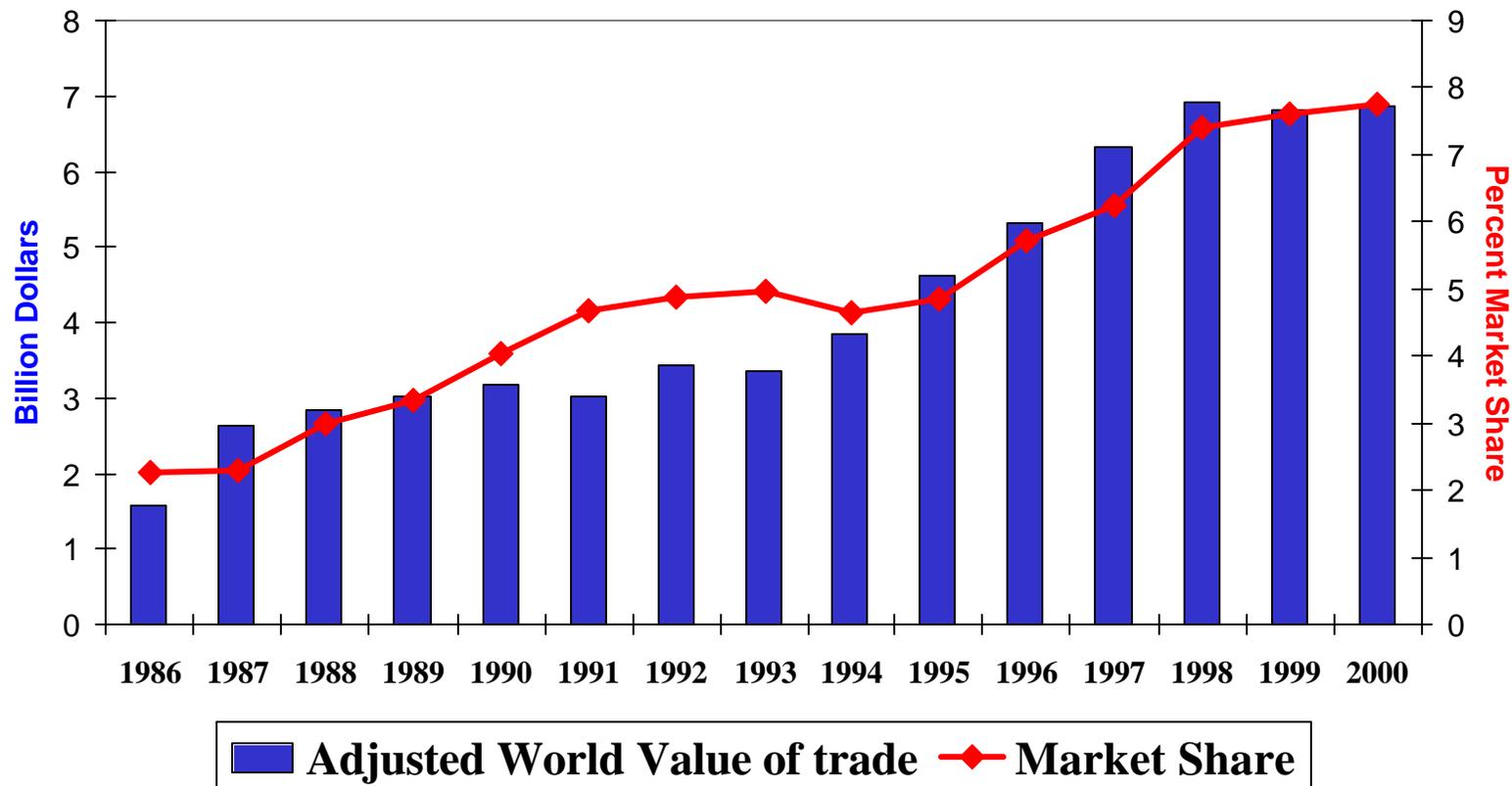
1999 2000 2001

# UK Market Shows Continued Growth for U.S. Wines



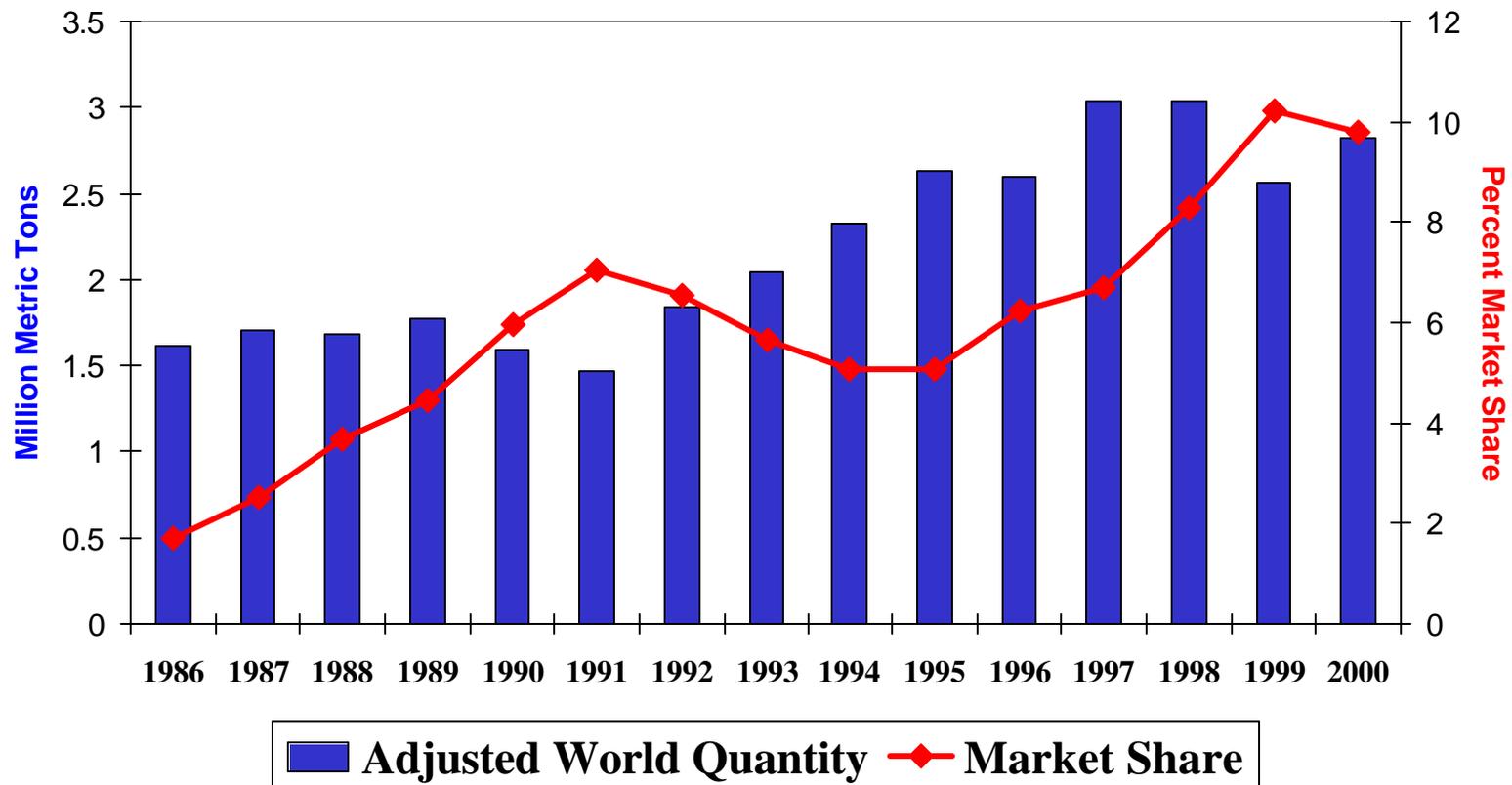
Source: U.S. Department of Commerce, Bureau of the Census

# World Wine Exports and U.S. Market Share (Value)



Source: FAO

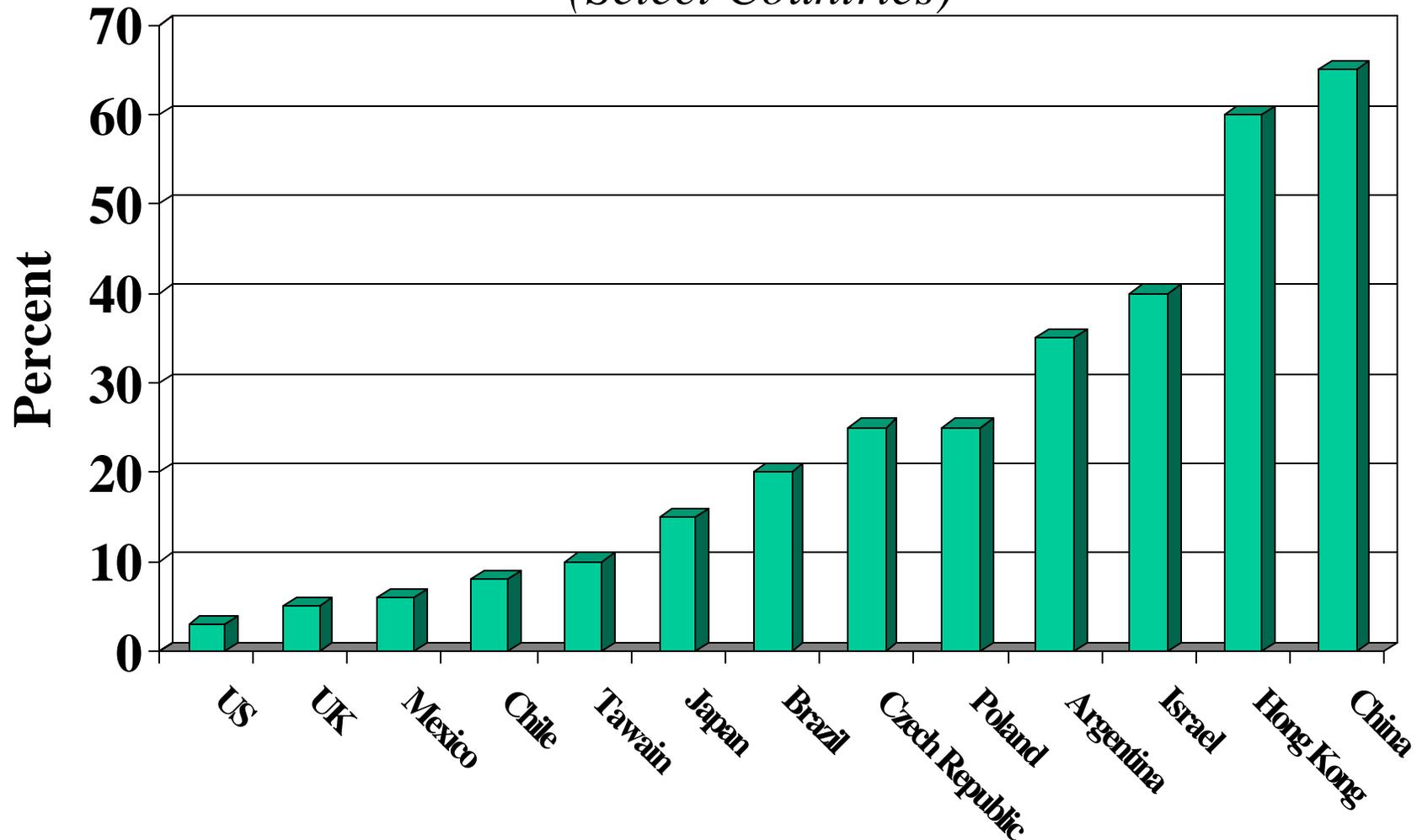
# World Wine Exports and U.S. Market Share (Quantity)



Source: FAO

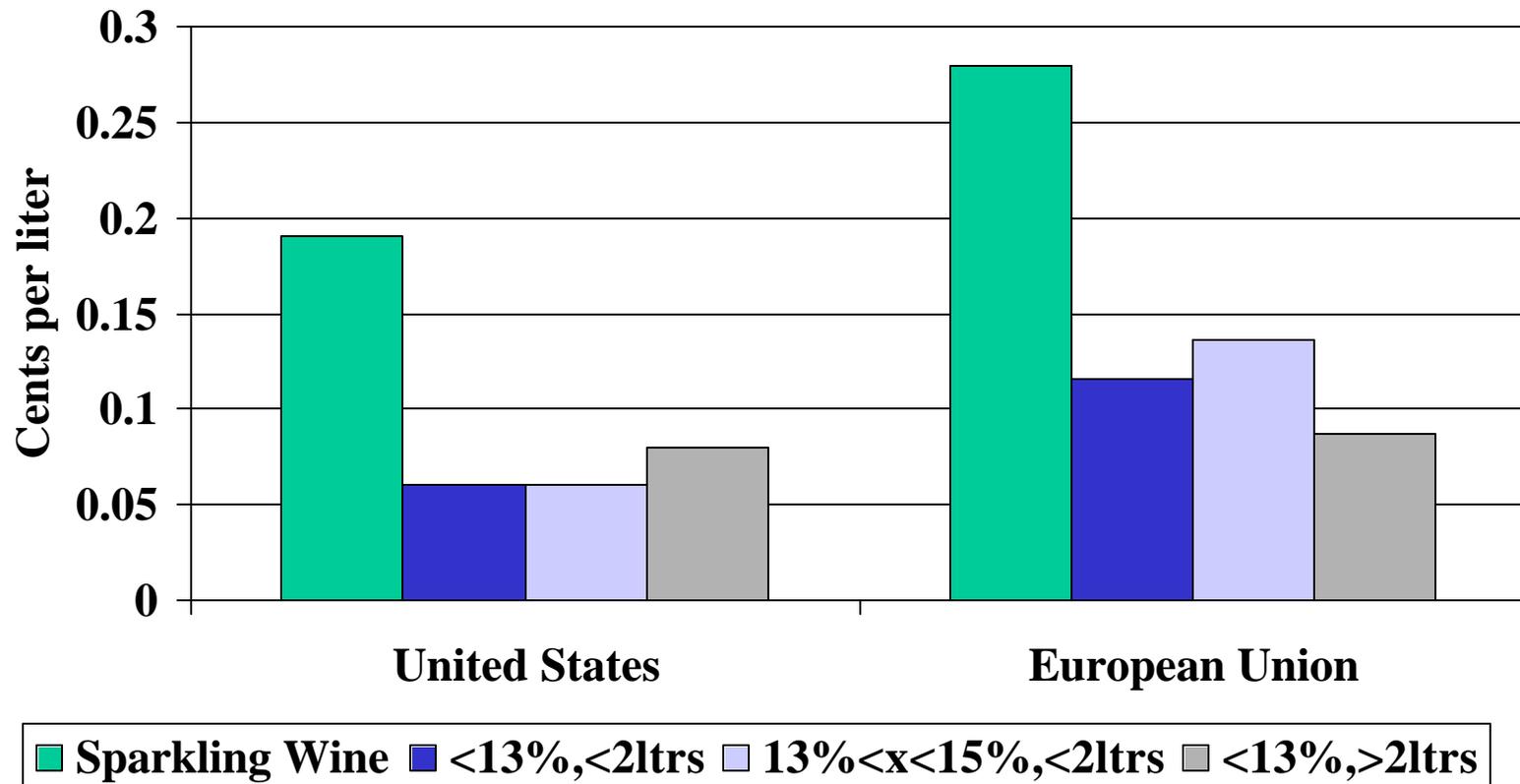
# Ad Valorem Equivalent Duty on Imported Wine

*(Select Countries)*

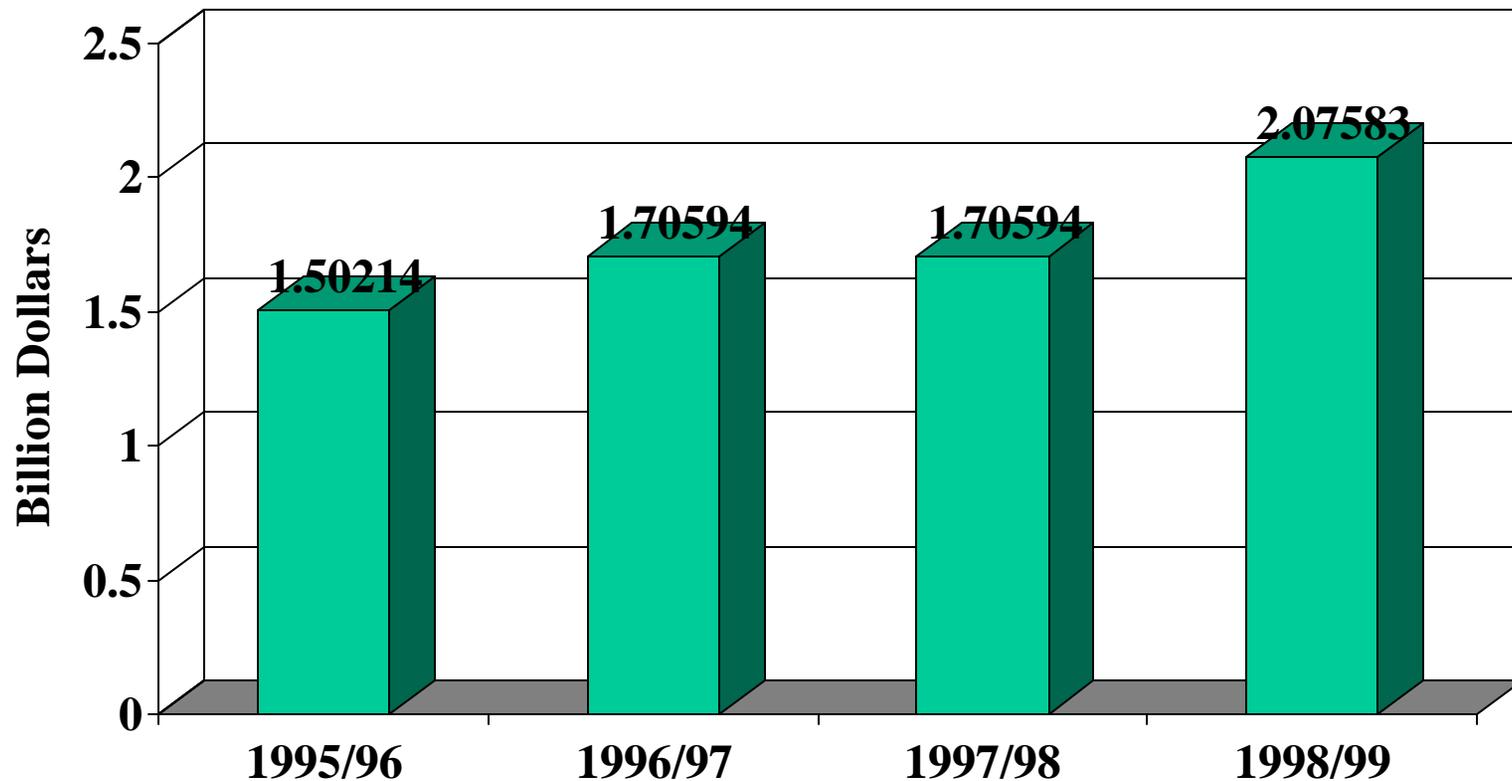


\* Estimated – refer to official publication for exact rates

# EU and US Import Tariffs on Wine



# EU Aggregate Measure of Support\* for Wine



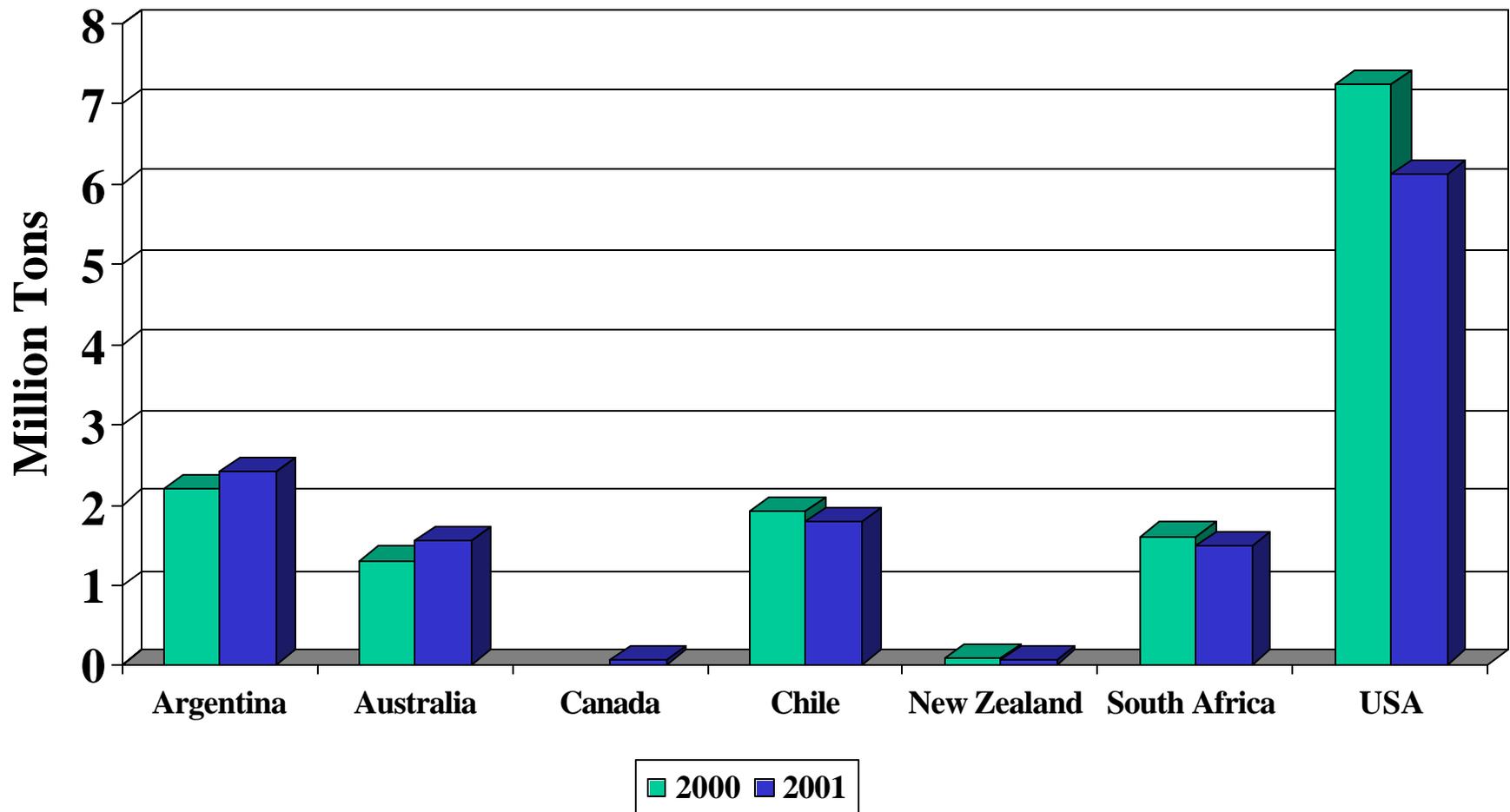
\*AMS: The level of support does not represent actual budgetary outlays but rather is a calculation to provide a benchmark, using a base period of 1986/88, with respect to overall agricultural support commitments to the WTO.

Source: WTO Notification

# The New World Wine Producers



# World Wine Trade Group Production



Source: Producers meeting July 2002

# The New World Wine Producers

## *Agreement to Promote Wine Trade*

- **Each country will permit the importation of wines from each signatory country that are in accordance with each country's domestic laws.**
- **Agreement recognizes that different countries use different wine making practices due to local conditions, climatic variations, and traditions and that grape growing and wine making practices are ever-evolving.**

# The New World Wine Producers Continued

- Participating countries believe that good regulations within country is the best way to facilitate trade.