EUROPEAN WINE: a solid pillar of the European Union economy
Founded in 1960, the CEEV – Comité Européen des Entreprises Vins – is the representative professional body of the EU industry and trade in still wines, sparkling wines, liqueur wines, aromatised wines and other vine products. Its members produce and market the vast majority of quality European wines, both with and without geographical indication, and account for over 90% of European wine exports.

The European wine companies we represent bring a major contribution to the socio-economic dimension of the wine sector in Europe and play a pro-active role in the economy of wine-growing regions. Our companies either cultivate their own vineyards or work closely with grape-growers, supporting local wine-related economies by buying and producing grapes and wines, and selling them in Europe and all over the world. Through their know-how, they provide added value to European wine in their different markets worldwide.

“Sometimes, it is worth remembering that the European Wine sector is a strong leader throughout the world, not only in terms of production, but also in terms of consumption and in terms of exports.

The wine business cannot be relocated, and plays a fundamental role in maintaining activities and people in our rural areas. In some regions, if there were no vineyards, no one would live there.

Finally, wine is part of our culture, our traditional style of living. It is about conviviality, sharing, enjoying. I hope this brochure will help underlining the importance of the wine sector in our society, and in the European economy.

The companies we represent are the master corner piece of the European wine filière and therefore this publication is about the whole wine filière and not only about CEEV companies.”

Jean-Marie BARILLÈRE
President
CEEV
For a sustainable wine culture, that always inspires healthy lifestyles and well-being.

Wine is integral to many lifestyles and cultures across the world and enjoyed by millions of people. However, while for the vast majority of consumers, wine products represent a pleasurable beverage enjoyed responsibly and in moderation, a minority of them misuse alcoholic beverages in ways that are damaging to themselves and that can harm others around them.

With the opportunity offered by the EU Strategy to support Member States in reducing alcohol-related harm with the firm commitment to encourage responsible and moderate wine drinking as a social and cultural norm, the CEEV led the European wine sector to develop the “Wine in Moderation – art de Vivre” programme which came to life in 2008.

Wine in Moderation is a common programme centrally coordinated and nationally implemented, with the capacity to adapt to local needs while respecting cultural diversity.

The programme works to encourage responsibility and moderation in the consumption of wine as a cultural and social norm and inspires healthy lifestyles with a view to preventing and reducing alcohol abuse and its related harm. at the same time, it preserves the sustainable environmental, economic and cultural place of wine in our societies.

Since 2011, under the international coordination of the WiM association, the Wine in Moderation Programme has reached more than 26 countries worldwide.

“We are happy to see that the Wine in moderation Programme is gaining traction, and has grown into a horizontally and vertically integrated international social responsibility Programme focused on self-regulation, education and sharing science.”

George Sandeman
President
WiM Association

Source: OIV / DG AGRI

In 2015, more than 3 out of 5 bottles commercialised in the world were produced within the EU
The world’s biggest wine producer

“In my role as Commissioner, I travel throughout the EU, and it is clear to me that European citizens cherish the rich heritage of our wine-growing regions, and they want our wine sector to remain healthy and productive. I believe the future remains bright for our growers, producers and operators. You have a well-deserved global reputation for quality and innovation. Our challenge is to maintain and enhance this position in the coming years.”

Phil Hogan
European Commissioner for Agriculture & Rural development

In 2015, the EU wine sector produced the equivalent of 23 billion bottles, which represented 63% of the world wine production.

2015
Italy, France and Spain:
Leaders in the EU (80%)
Leaders in the World (50%)

Top 5 EU producers

Not only a matter of some EU countries

The expansion of the culture of wine in Europe is a reality – EU wine, a Mediterranean asset but not only!

Source: DG AGRI / OIV

Average 2010–2015
A sector that cannot be relocated

EU wines are a pure product of the European agriculture.

Our wines are exclusively produced with grapes cultivated in the fabulous and diverse terroirs of the European Union. It is hard to imagine another food sector as dependent on local production and that cannot rely on the international market to get its raw material.

Our wines rely heavily on a territory and on the communities living in this territory. In a historically well-balanced relation, the wine sector creates value for local communities and guarantees the maintenance of population in vulnerable rural areas where no other economic alternative exists. This dependence on territory is even embodied in the strict EU wine legal framework, which prohibits mixing our European wines with wines produced outside the European Union.

The intricate link with territory is best materialised in our wines with Geographical Indications, whose specific quality, reputation and characteristics are attributable to a concrete geographical origin where all the production takes place.

The link with territory is nothing new. Wine businesses were founded a long time ago, and some companies have been managed by the same families since the XVI century. Their heart is totally bound with the region, with their geographical indication.

European vineyards: a key player in shaping the territory

<table>
<thead>
<tr>
<th>3 362 000 ha of vineyard, the equivalent of:</th>
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<tr>
<td>• 1/2 Ireland</td>
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<tr>
<td>• Belgium</td>
</tr>
<tr>
<td>• 13 x Luxembourg</td>
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<tr>
<td>• 4 627 000 football fields</td>
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Each vineyard in the EU features a unique shape, terroir, climate and geology, giving each European wine its unique character.
A key job generator mostly composed of SMEs

The EU wine sector is composed of an overwhelming majority of small producers located in rural areas. Hence, vine-growing and wine production both support rural development and secure the prosperity of wine-related jobs in several EU regions.

Around 2,400,000 wine producing holdings, for 3,000,000 direct fulltime jobs, most of them in rural areas.

Not only does our sector maintain activities and jobs in rural areas, but it also generates more specialised and better-paid work compared to other agricultural sectors.

From small specialised wineshops to large supermarkets, off-trade is estimated to represent more than 50% of the total sales of wine.

EU WINES HAVE A SPECIAL LINK WITH THE EU HOSPITALITY AND TOURISM SECTORS, WHICH REPRESENT RESPECTIVELY 10 MILLION AND 12 MILLION JOBS IN THE EU

“WINE TOURISM can contribute to fostering sustainable tourism by promoting both the tangible and intangible heritage of the destination. WINE TOURISM is capable of generating substantial economic and social benefits for key players of each destination, in addition to playing an important role in terms of cultural and natural resource preservation. WINE TOURISM provides an opportunity for underdeveloped tourism destinations, in most cases rural areas, to mature alongside established destinations and enhance the economic and social impact of tourism on a local community.”

Georgia Declaration of the UN World Tourism Organisation

Source: EUROSTAT 2015
The socioeconomic dimension of the wine sector goes well beyond the agricultural activity in the vineyards and cellars as it also involves indirect economic activities linked to the wine production.

**Nursery sector:** The European grapevine nursery production is the first important step in the grape-wine production chain, as it influences the quality and quantity of the European wines. Only in France, around 3,600 ha are dedicated to the production of almost 200 million grafted vines each year.

**Specific Agricultural Machinery Production:** The EU wine sector works in close collaboration with agricultural machinery producers, in order to develop specific and cutting-edge tools allowing the sector to increase its efficiency and sustainability.

**Oak casks** represent a crucial component of the wine world, as each characteristic of the casks affect the finished wine (type, size, age, etc.). Today, it is estimated that around 25% of the EU wines are aged in oak casks. The EU is the global leader in barrels’ production and its market alone represents around 60% of the global market.

**Glass bottles:** By bottling their wine in glass bottles, European winemakers ensure that the quality of their product is not altered by the container. The EU glass container industry provides employment to some 50,000 people, the wine sector being one of the main clients of the packaging glass industry.

**Cork:** European cork producers help winemakers preserve the aromas and unique characteristics of each wine. The wine industry plays a key role in the sustainability of the European centenary forest of cork oak trees - Quercus Suber L. With 716,000 hectares of oak forest, Portugal is the world leader of an industry that produces around 13 billion cork stoppers annually.

**Oenological products:** Oenology has developed a wide range of tools and techniques to accompany the winemaking process, while at the same time ensuring strict hygiene standards. This sector currently represents more than 2,500 jobs in the EU.

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1 Fédération des Tonneliers de France
2 The European Container Glass Federation (FEVE)
Internal Market – a key asset for EU wine operators

“It is very important to ensure the smooth functioning of the Internal Market which, by allowing wine products to circulate freely within the Member States, does not only simplify the trade administrative burden within the EU but also creates a level playing field for EU operators and protects consumer’s interests”.

Françoise Grossetête MEP

Consumption in traditional wine producing countries has been steadily decreasing while non-traditional wine producing countries appreciate more and more the culture of wine: the free circulation of wines within the Internal Market is key to meet the demand of these new consumers, and consequently, is key for the good performance and sustainability of the EU wine sector.

The good performances of the EU wine sector especially depend on the smooth functioning of the internal market, only possible thanks to a comprehensive, inclusive and harmonised sectoral set of rules at EU level.

The positive impact of the wine sector in the EU is not limited to producing countries, it does also benefit the economic activities of EU importing countries in areas such as bottling, marketing, transport, logistics, sales...

Source: DG AGRI / EUROSTAT 2015 / OIV / CEEV
International trade, the cornerstone of the long-term sustainability of the sector

EU wine exports over the last decade

Generating a positive trade balance of €7.2 billion for the EU

Despite the increase of consumption at world level, the consumption in Europe keeps steadily decreasing; the growth prospects for the European wine sector are mainly outside the EU. In this context it is crucial for the wine sector that the European Union keeps working on developing an assertive and ambitious international trade policy.

By opening new markets and ensuring the full implementation of existing Free Trade Agreements, the European Commission would highly contribute to the long-term sustainability of the EU wine sector.

We need open markets. Wine consumers around the world are open to all origins of wines. The EU wine sector is an offensive sector opposed by principle to protectionist measures and which is not afraid of fair competition.

Main trade barriers to be tackled for European wines:
- Import tariffs
- Inappropriate standards
- Burdensome administrative procedures
- Tax discrimination
- Abuse of State Monopoly
- Disproportionate labelling rules
- Counterfeiting

Source: EUROSTAT 2015 / DG AGRI
The socioeconomic dimension of the wine sector goes well beyond the agricultural activity in the vineyards and cellars as it also involves indirect economic activities linked to the wine production.

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Source: EUROSTAT 2015

Source: DG AGRI
The key role of Geographical Indications for the European economy

“GIs are a strategic tool to protect the European quality and to make visible our products in Europe and around the world. Indeed, they represent 90% of the total EU wine exports in value. We should be aware of the importance of this issue and protect our GIs on the global market especially in newly negotiated international agreements.”

Herbert Dorfmann
MEP
Chair of the Intergroup “Wine, Spirits and Quality foodstuffs”

The concept of quality wines in the European Union is based, inter alia, on the specific characteristics attributable to the wine’s geographical origin. Such wines are identified for consumers through protected designations of origin and geographical indications.

The European wines’ Geographical Indications in figures:

- **67%**: weight in volume of GI wines in 2015 EU wine exports
- **90%**: weight in value of GI wines in 2015 EU wine exports
- **63%**: part of EU wines protected by a GI

- **21**: number of EU Member States that own either a PDO or a PGI wine
- **459**: total number of EU wine Protected Geographical Indications
- **1 291**: total number of EU wine Protected Denominations of Origin

Source: DG AGRI / E-Bacchus
The specificity of Aromatised Wine Products (AWP): “Soil & Creativity”

The Aromatised Wine Products sector is intrinsically linked to the European wine family, for which it represents an important asset. The recently updated EU regulatory framework (Regulation (EU) 251/2014) ensures a high quality production by securing, on the one hand, that the traditional products keep those key characteristics that have contributed to their reputation, and on the other hand, that the sector remains innovative and competitive.

Products strongly associated to the EU wine economy

In 2015:
• AWP’s external trade generated a positive balance of more than €120 million for the EU
• Trade of EU AWP within the EU represented more than €230 million

Over the years, the aromatised wine family has been widespread across both Europe and the world: AWP’s main markets being Spain, Russia, Germany, France, Poland, Italy, UK and the US.

The European AWP sector does not only evoke soil, heritage and traditional know-how but also innovation and creativity. By taking its inspiration from different cultures, by mixing flavours, and developing new recipes, using unique natural aromas, the sector worked hard to constantly adapt and best meet consumers’ expectations.

While a generic sales denomination covers an entire category, AWP represent a wide range of different product categories:

Vermouth, Sangria, Starkvinsglögg, Bitter, Glühwein, sparkling wine cocktail

The implementation of GIs in the EU has been extended to AWP in 1991, granting a special protection to products such as:

• Nürnberger Glühwein • Samoborski bermet
• Thüringer Glühwein • Vermouth de Chambey • Vermouth di Torino

Source: EUROSTAT 2015
Wine in Moderation

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George Sandeman
President
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2011-2015 Investment by the Wine in Moderation Programme actors
End Note

“Our industry is committed to playing a key role in the economic, social and environmental sustainability of European regions.

We want to continue to invest and create added value for our national and EU economies. We want to maintain our contribution to the EU economy with, among others, our impressive positive trade balance.

We are committed to offering our consumers a wide and diverse range of wines and aromatised wine products that meet their expectations, and to encouraging moderation in the consumption of wine as a cultural and social norm.”

Dr. Ignacio Sánchez Recarte
Secretary General
CEEV

To support sustainability in the wine sector, we need:

- A harmonised EU legal framework adapted to the wine sector’s characteristics
- A Common Agricultural Policy that supports growth in the wine sector
- An ambitious and successful EU international trade policy
The EU Wine sector

- 3,362,000 ha of vineyard
- 63% of worldwide wine production
- 3,000,000 direct jobs
- €9.8 billion exports
- €7.2 billion trade surplus
- 1 Leading sector