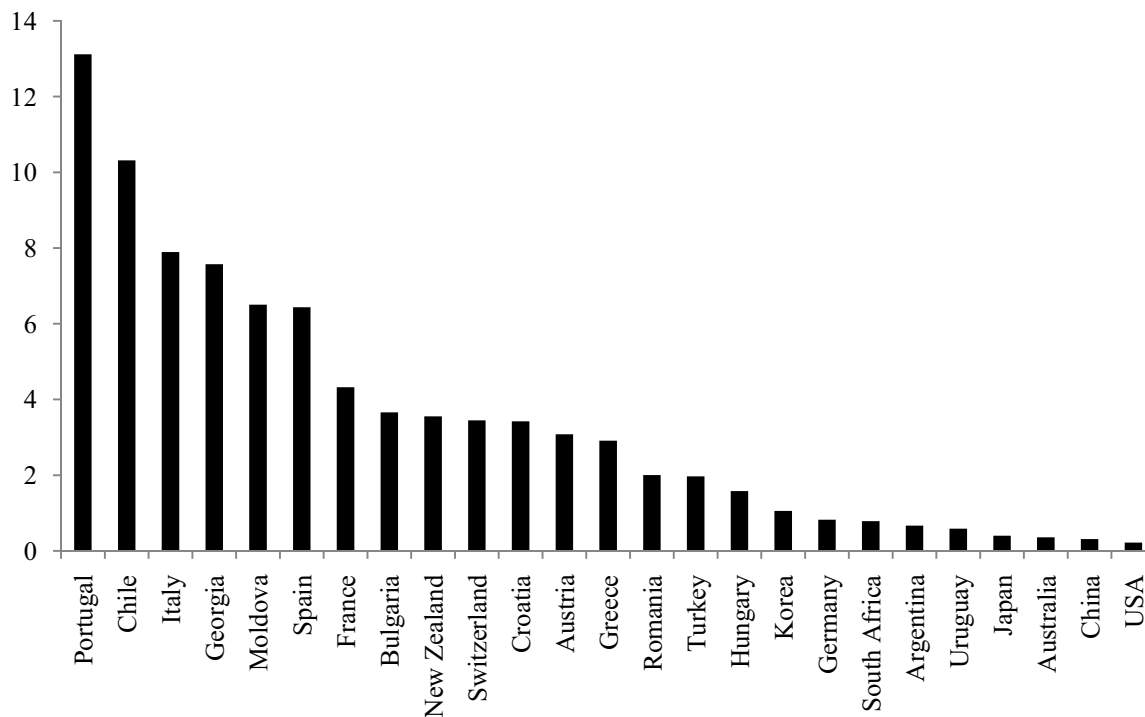
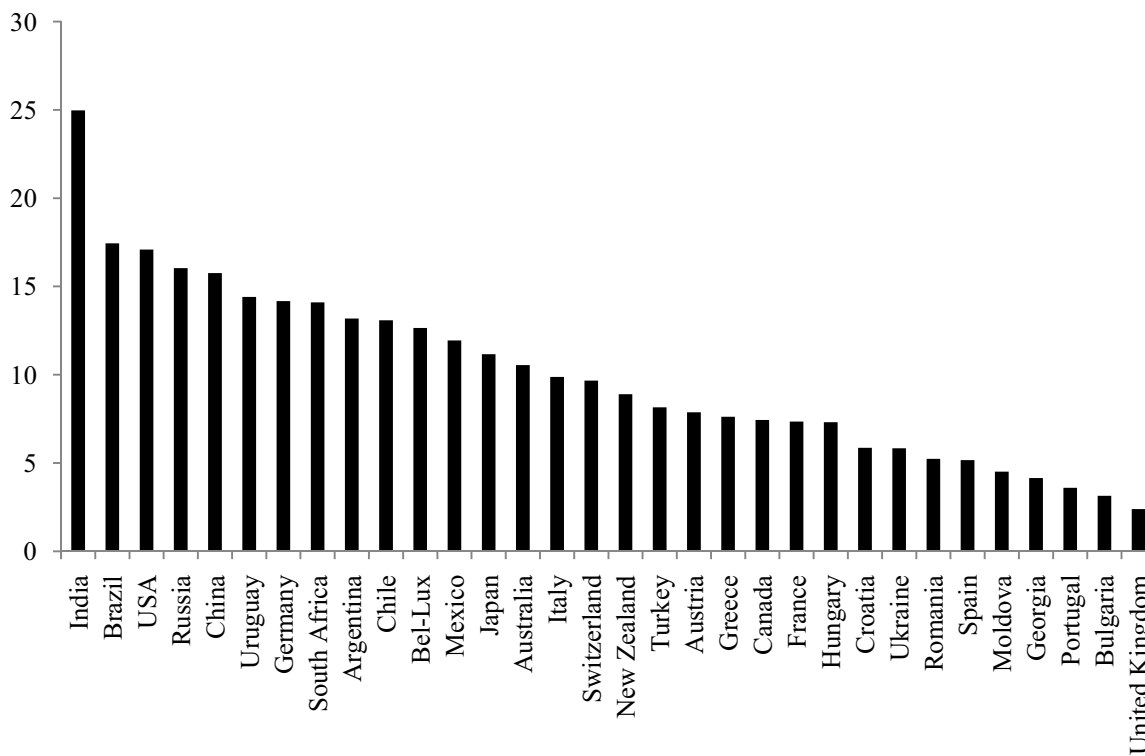


Global wine markets at a glance

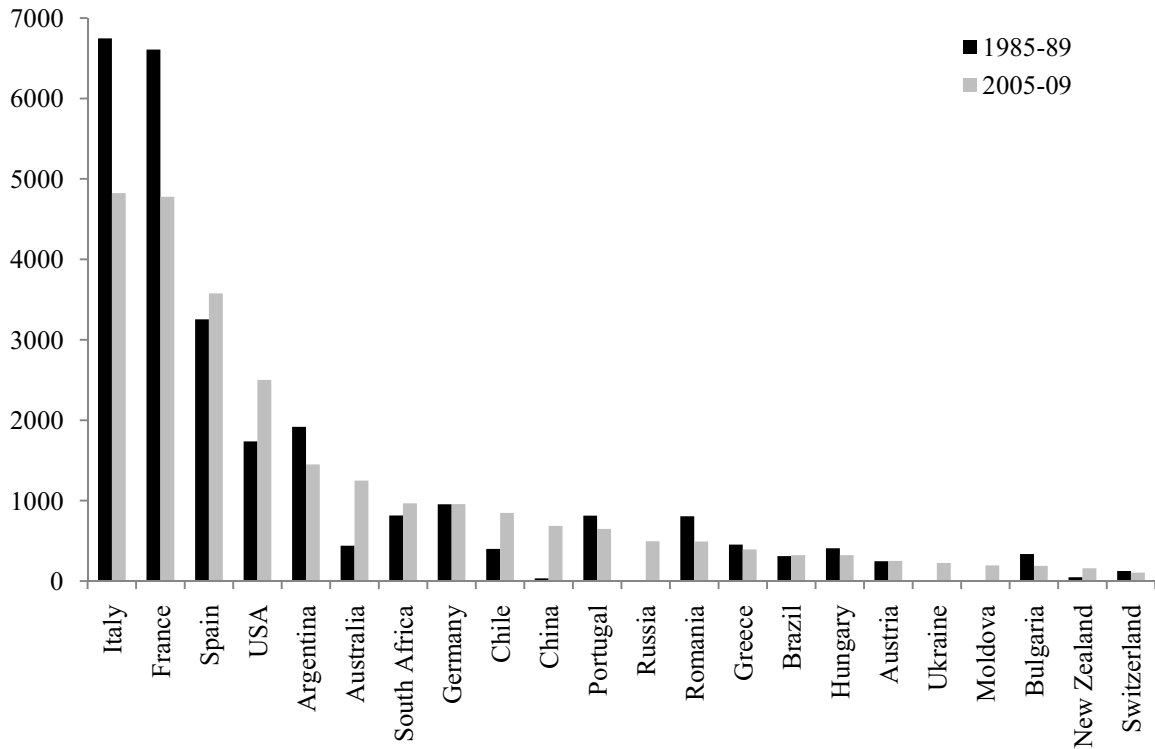
1. Share of total agricultural crop area under vines, 2006-08 (%)



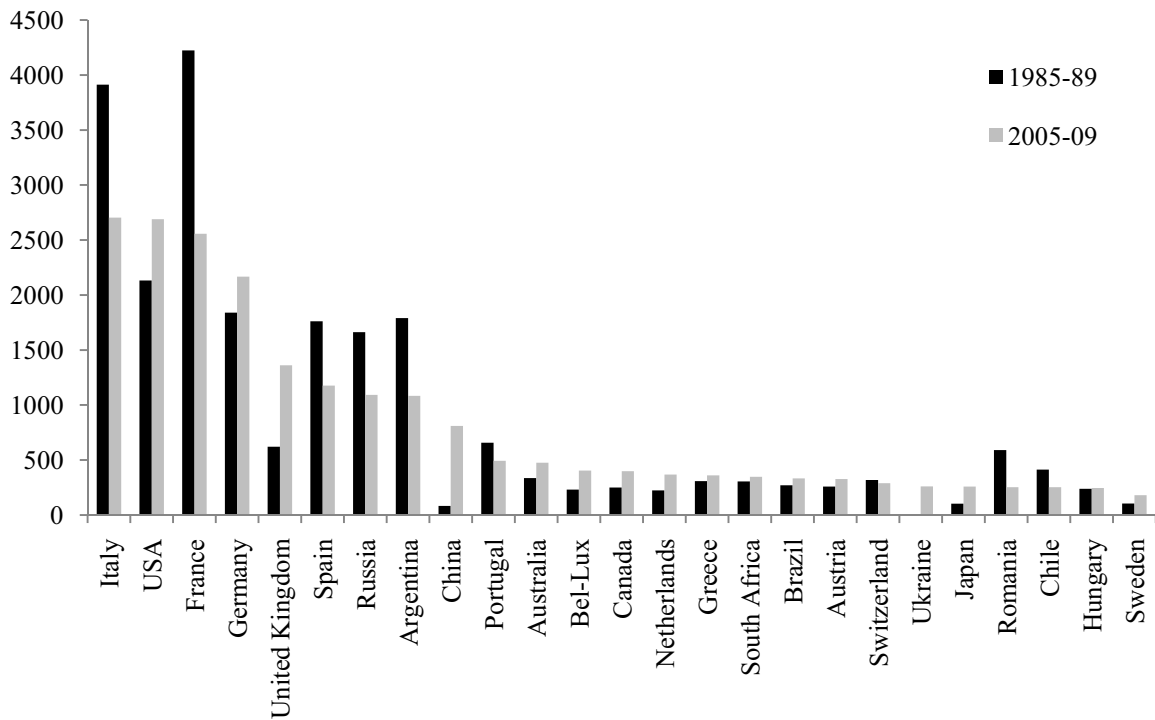
2. Grape yield per hectare, 2007-09 (t/ha)



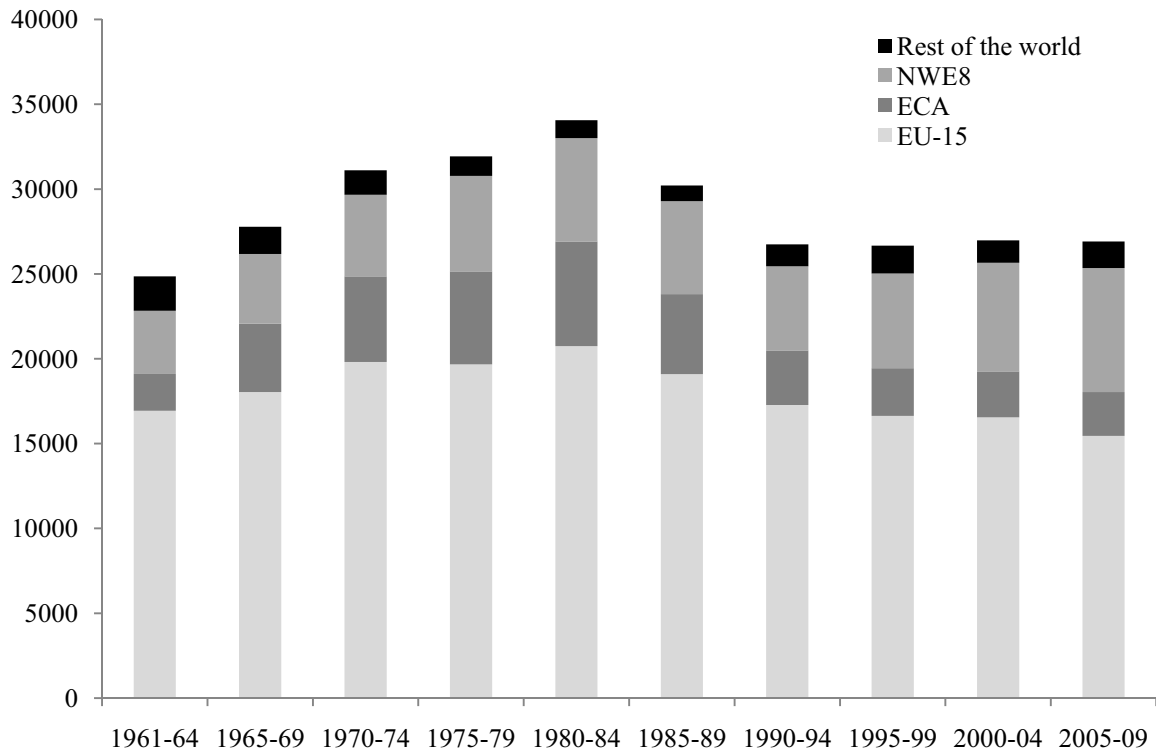
3. Volume of national wine production, 1985-89 and 2005-09 (ML per year)



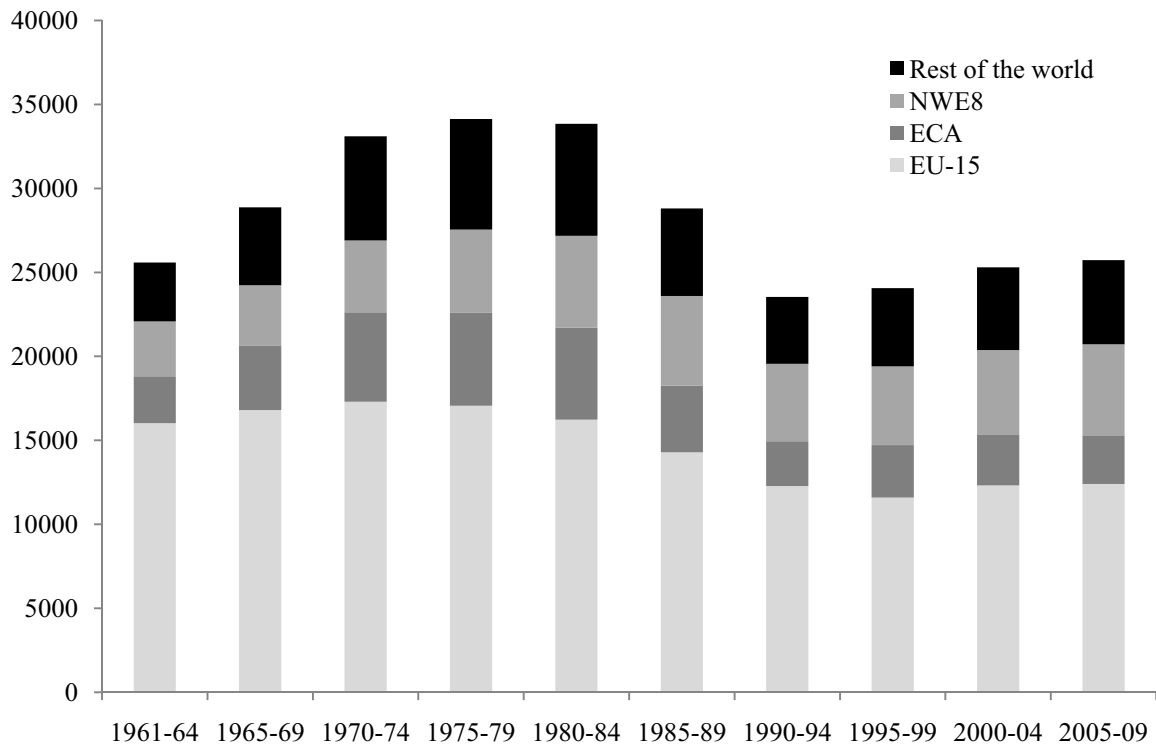
4. Volume of national wine consumption, 1985-89 and 2005-09 (ML per year)



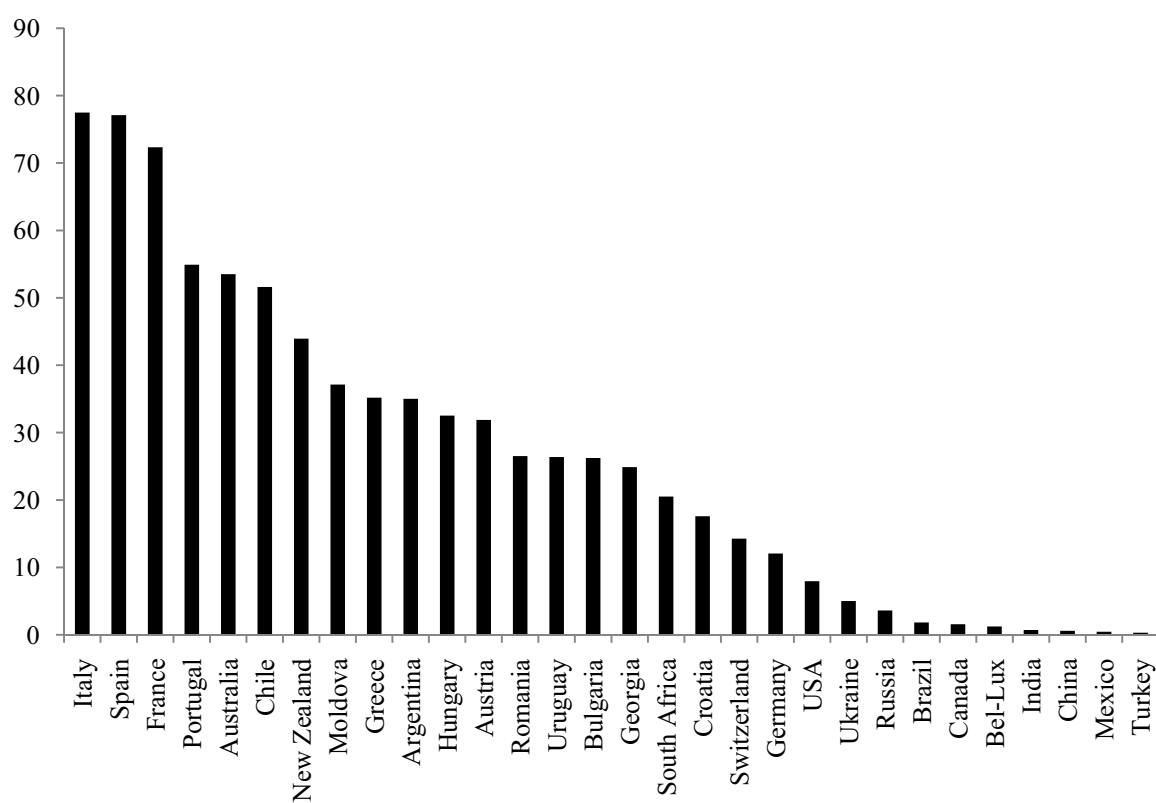
5. Volume of world wine production, 1961-64 to 2005-09 (ML per year)



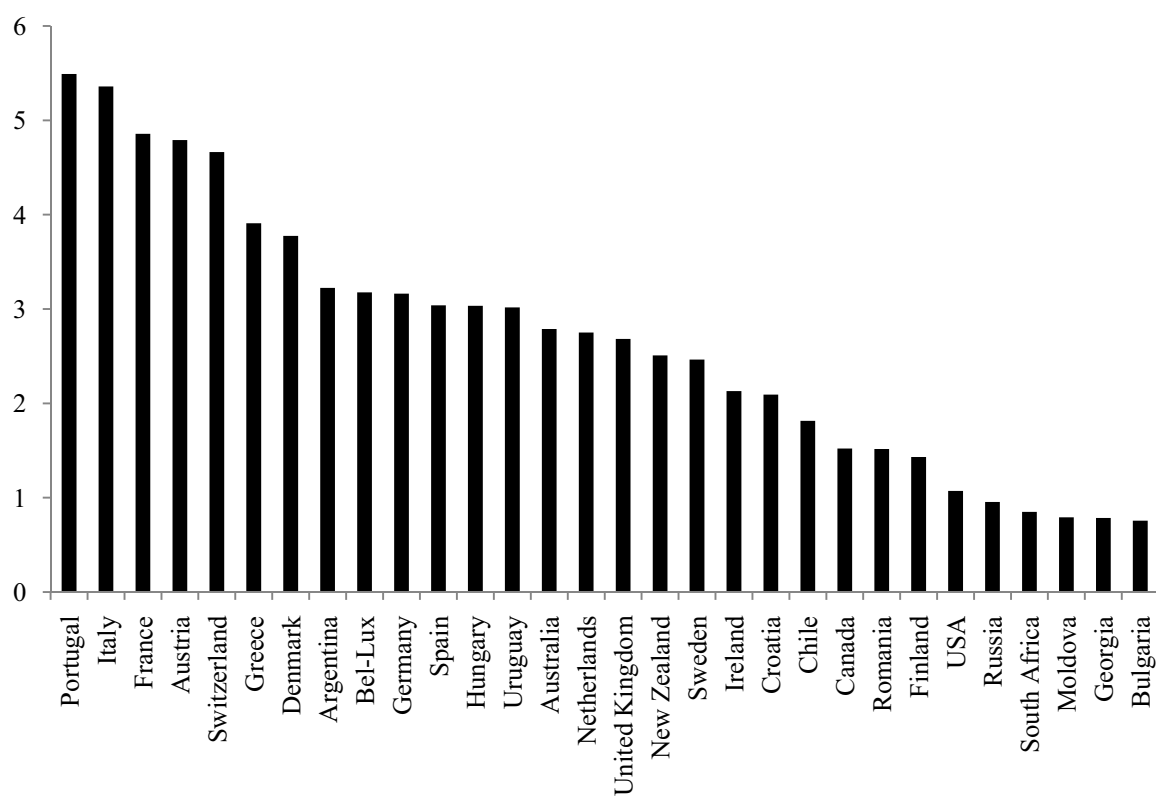
6. Volume of world beverage wine consumption, 1961-64 to 2005-09 (ML per year)



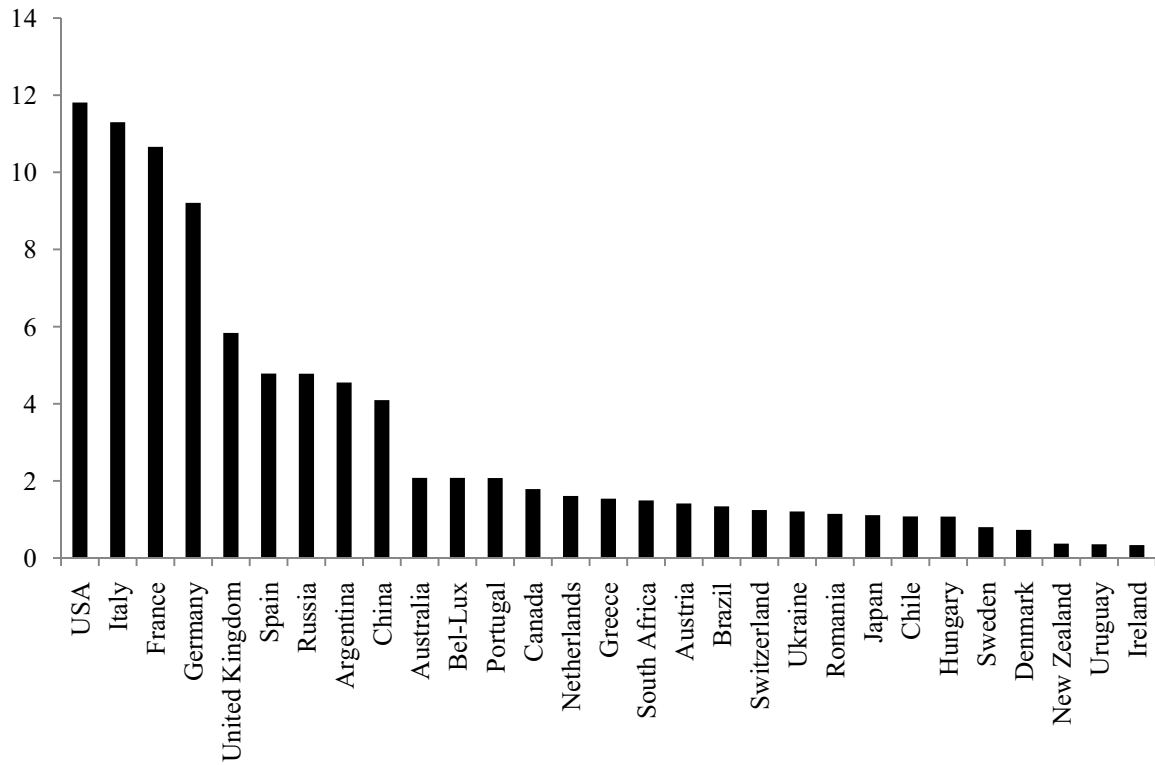
7. Volume of wine production per capita, 2007-09 (litres per year)



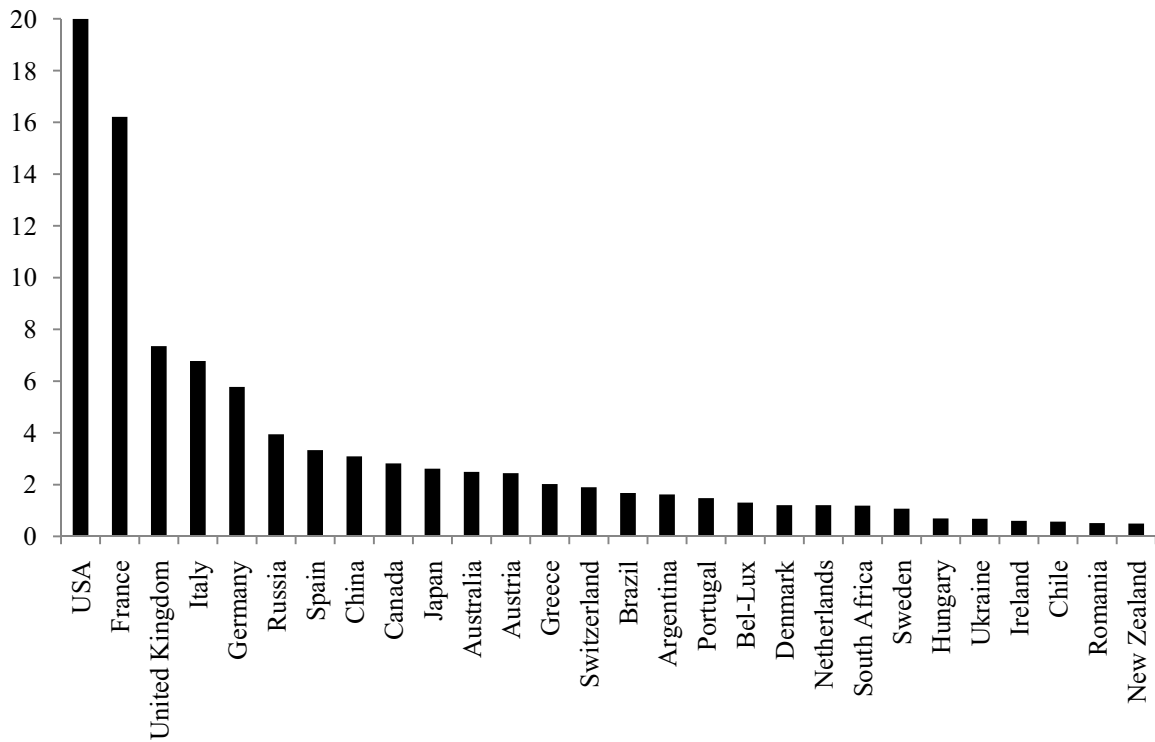
8. Volume of wine consumption per capita, 2007-09 (litres per year)



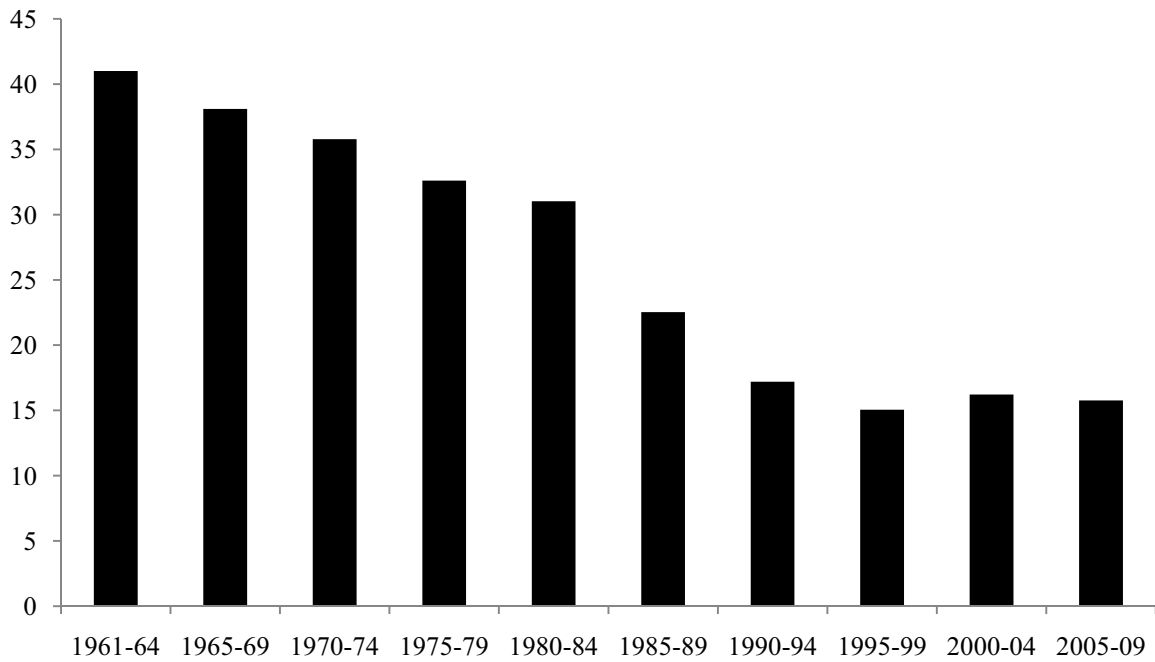
9. National shares of world wine consumption volume, 2007-09 (%)



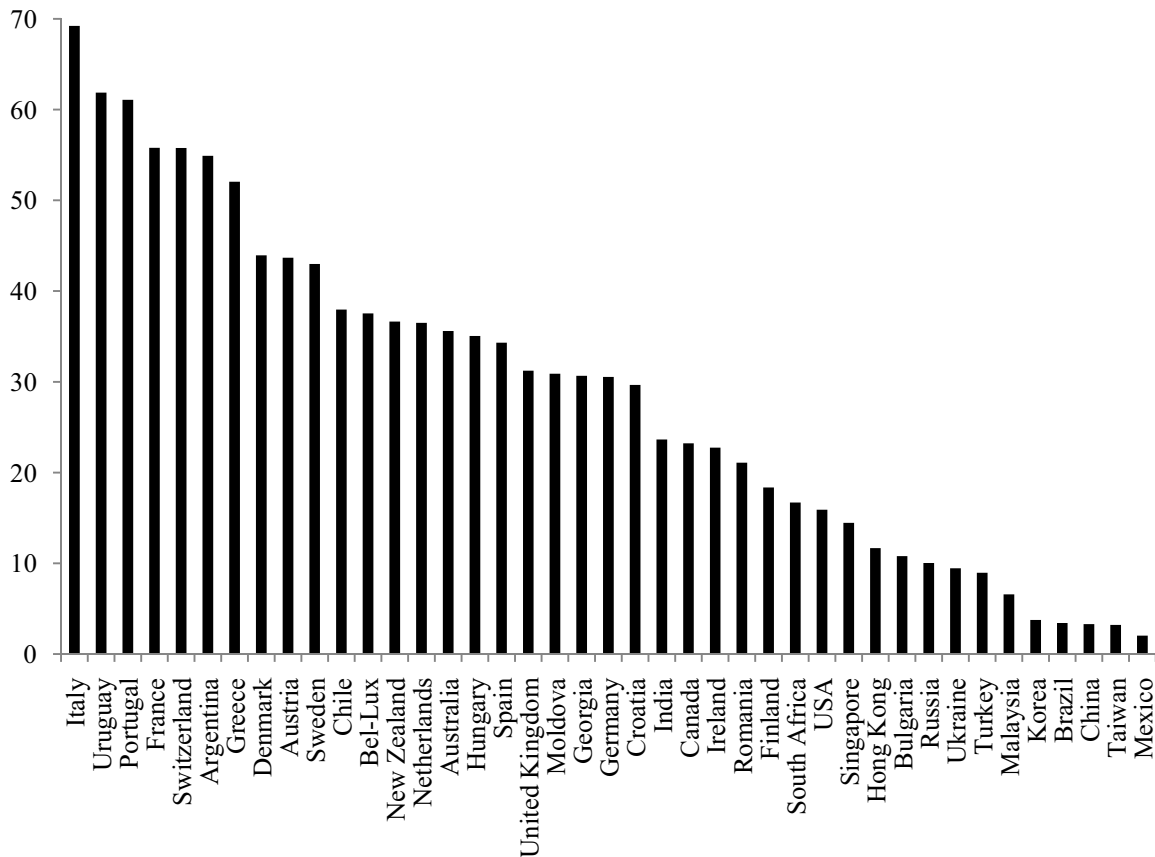
10. National shares of world wine consumption value, 2009 (%)



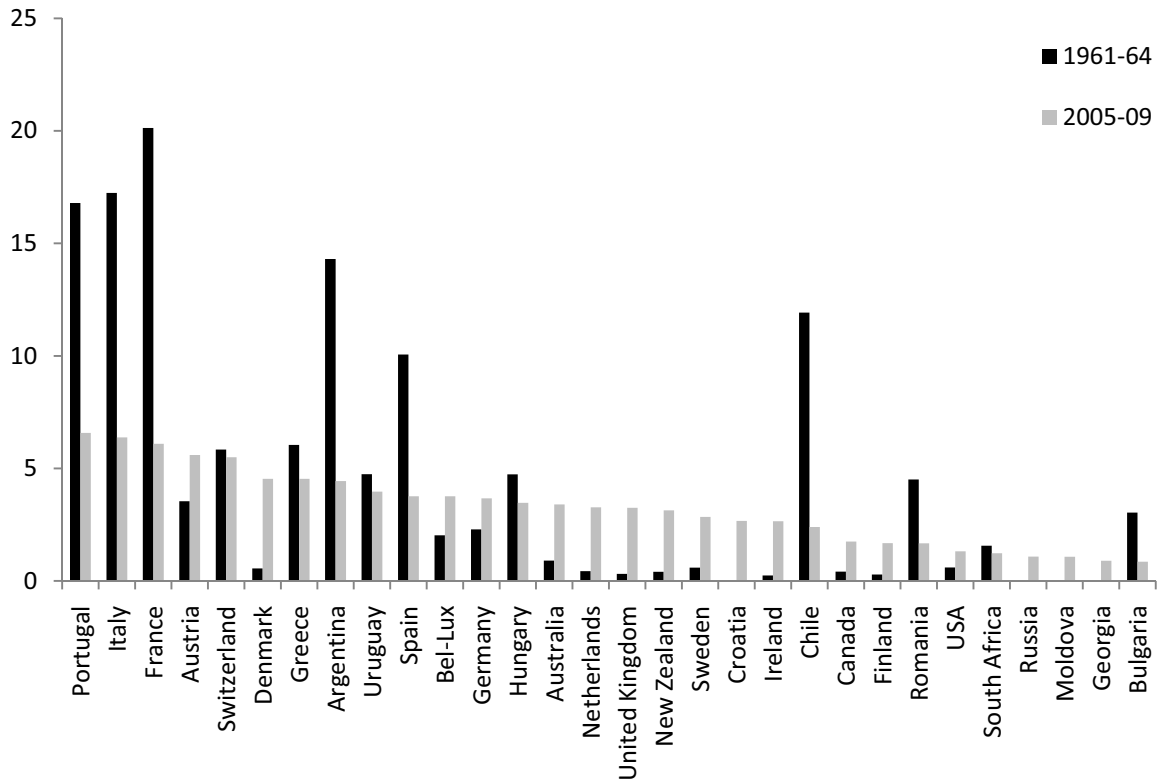
11. Wine's share of world recorded alcohol consumption volume, 1961-64 to 2005-09 (%)



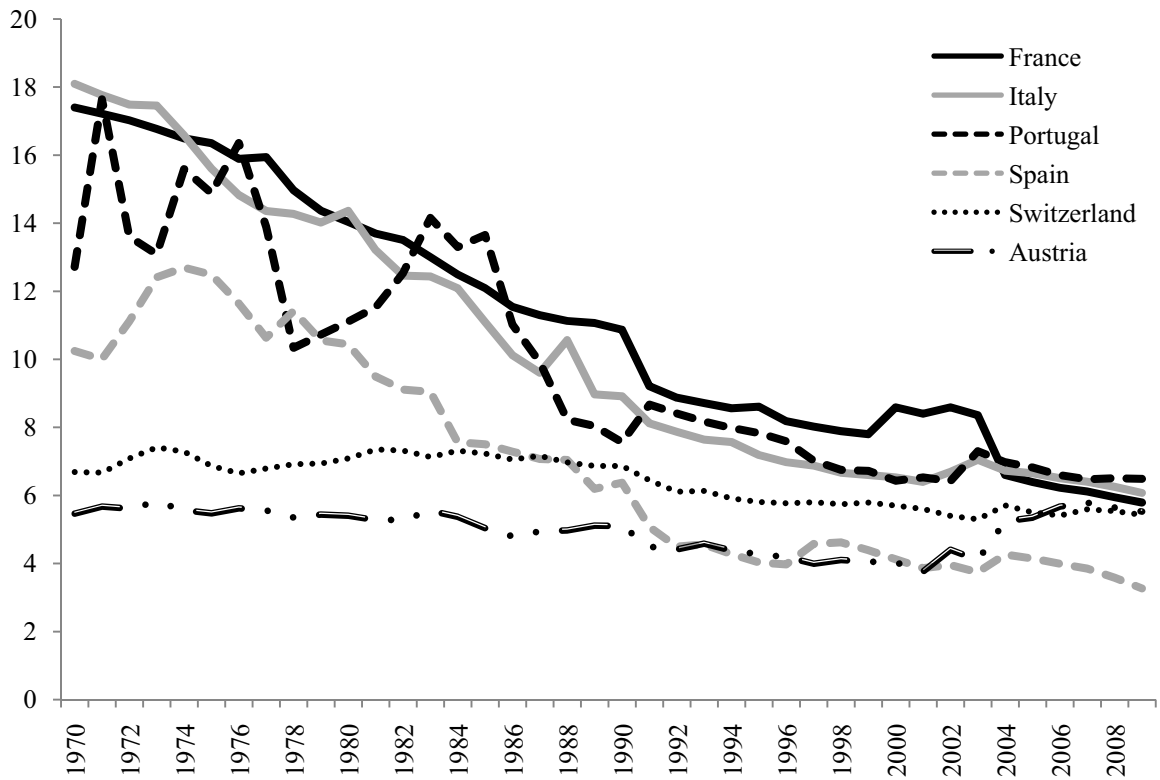
12. Wine's share of national recorded alcohol consumption volume, 2007-09 (%)



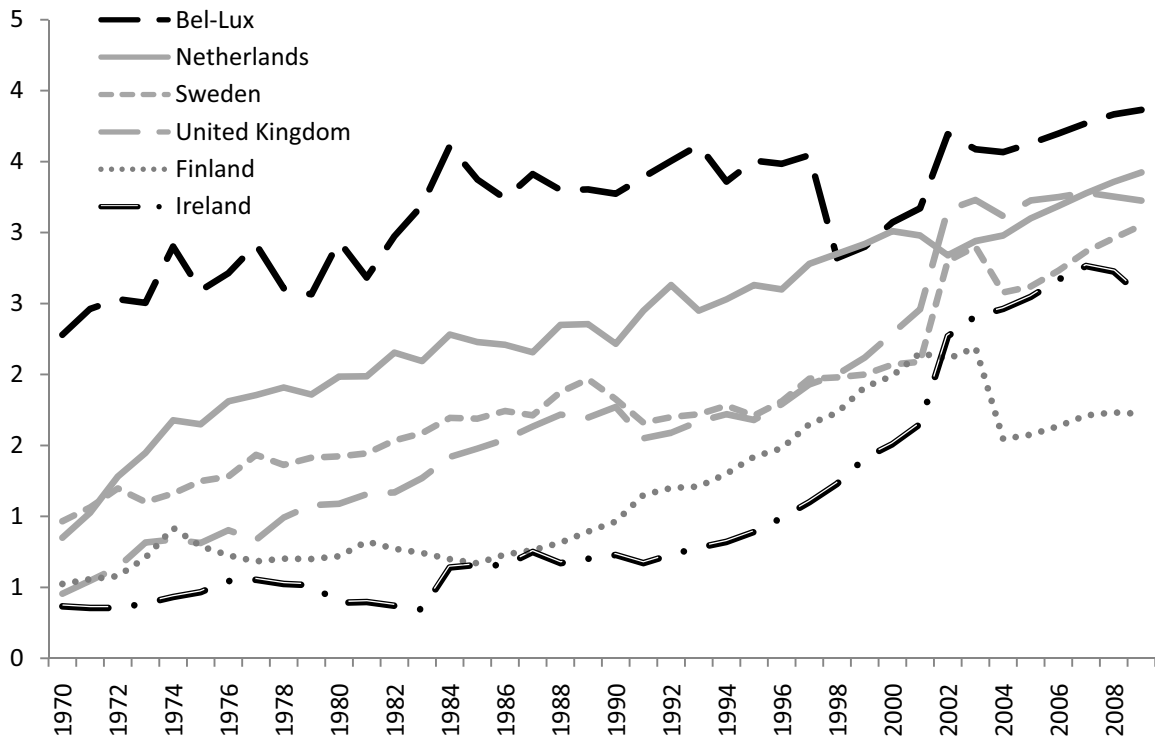
13. Wine consumption per adult, 1961-64 and 2005-09 (litres of alcohol per year)



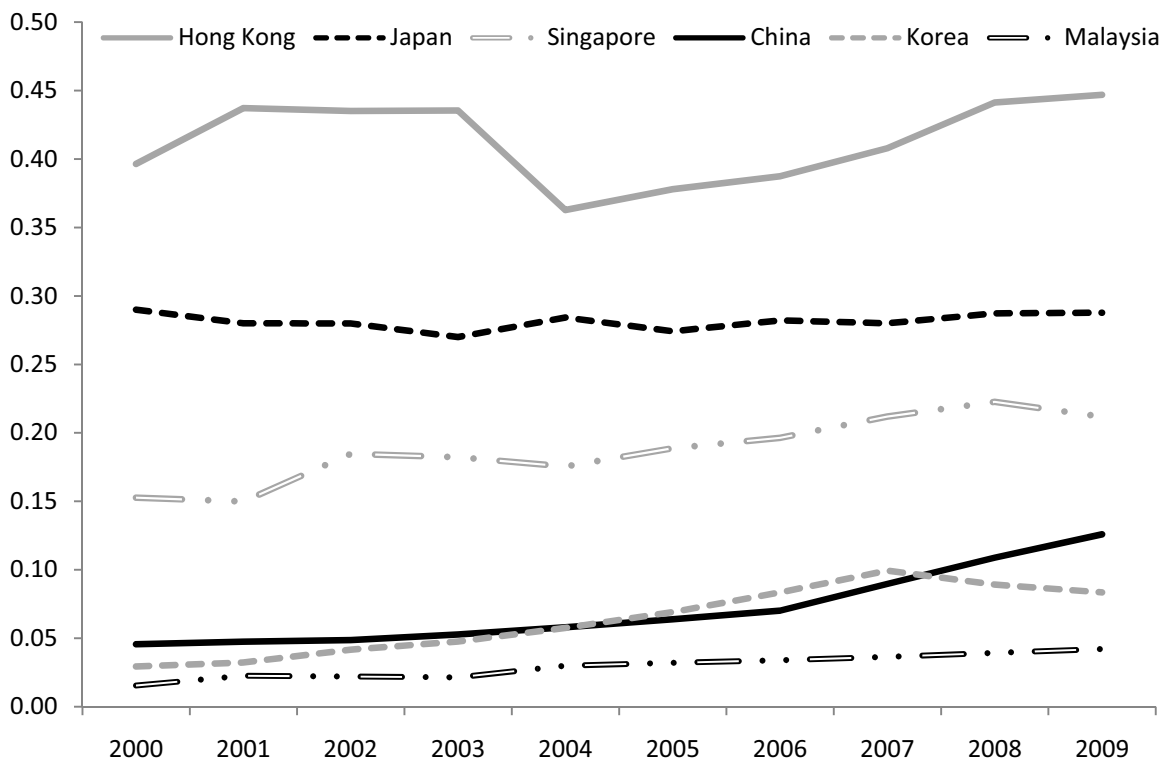
14. Wine consumption per adult, traditional European markets, 1970 to 2009 (litres of alcohol)



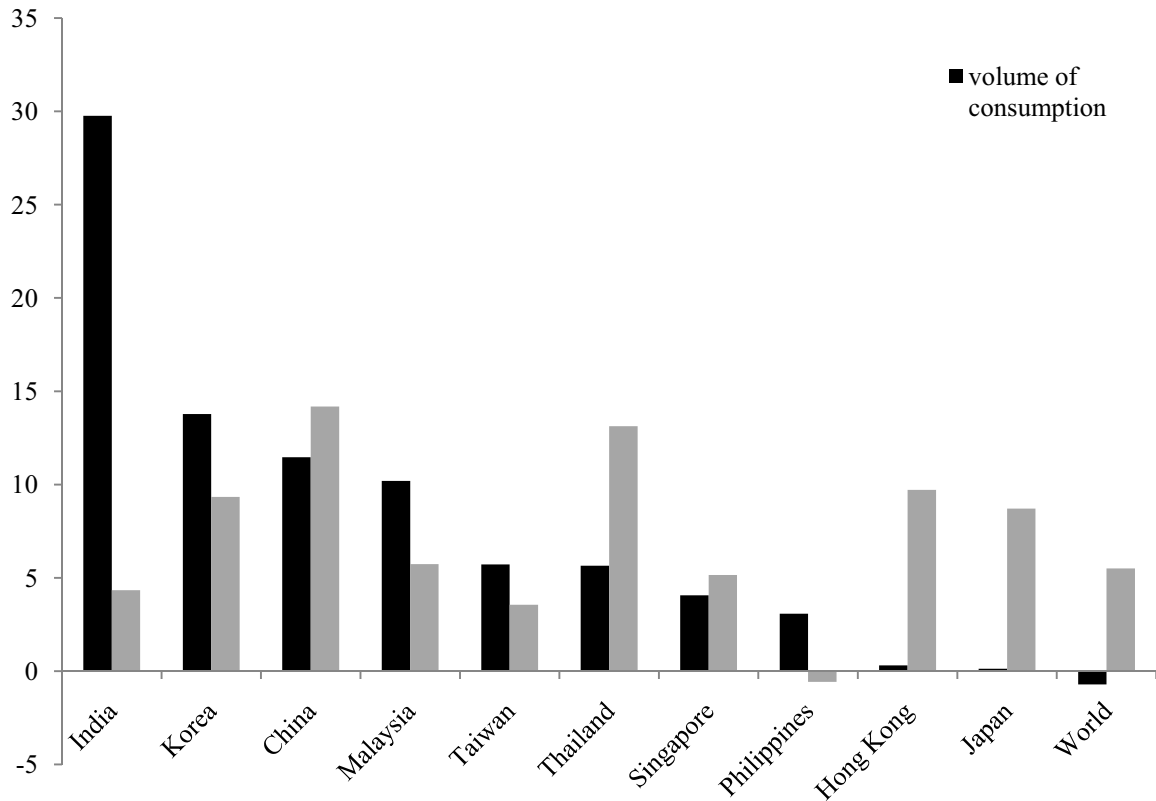
15. Wine consumption per adult, other European markets, 1970 to 2009 (litres of alcohol)



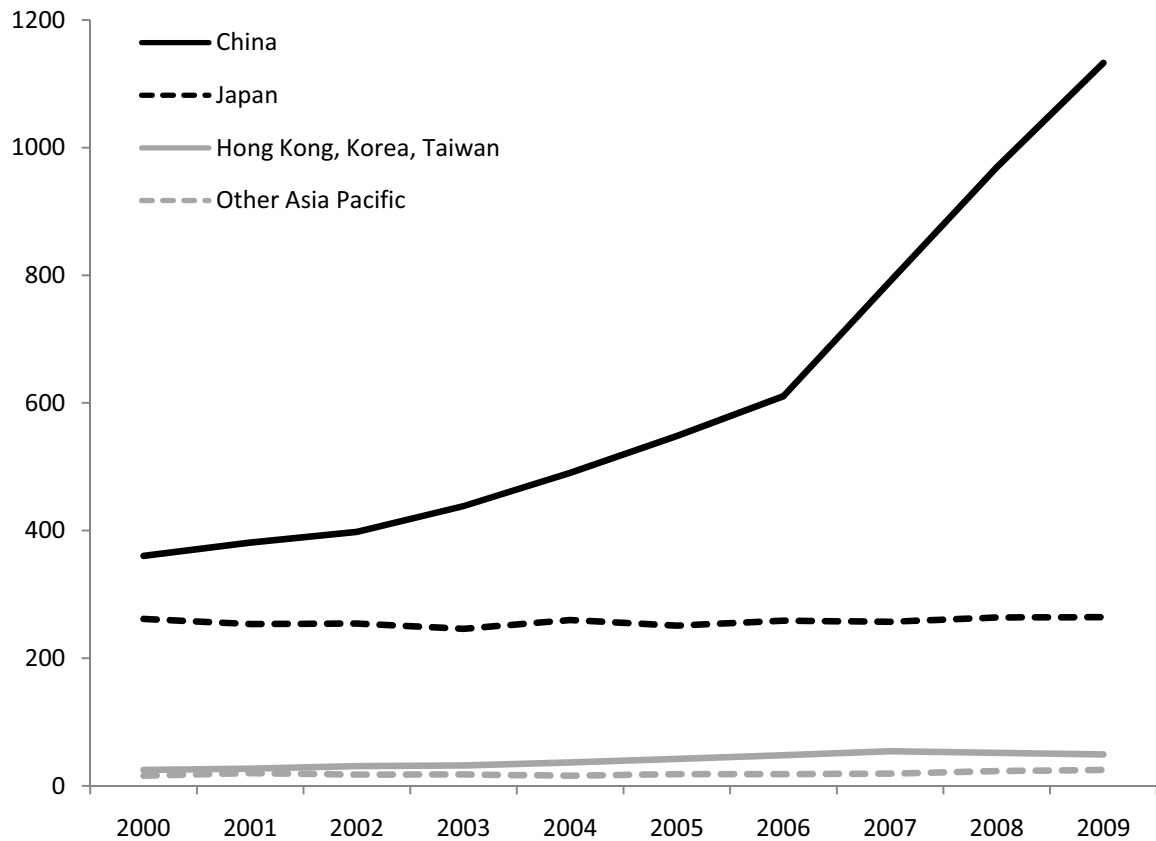
16. Grape-wine consumption per adult, Asian markets, 2000 to 2009 (litres of alcohol)



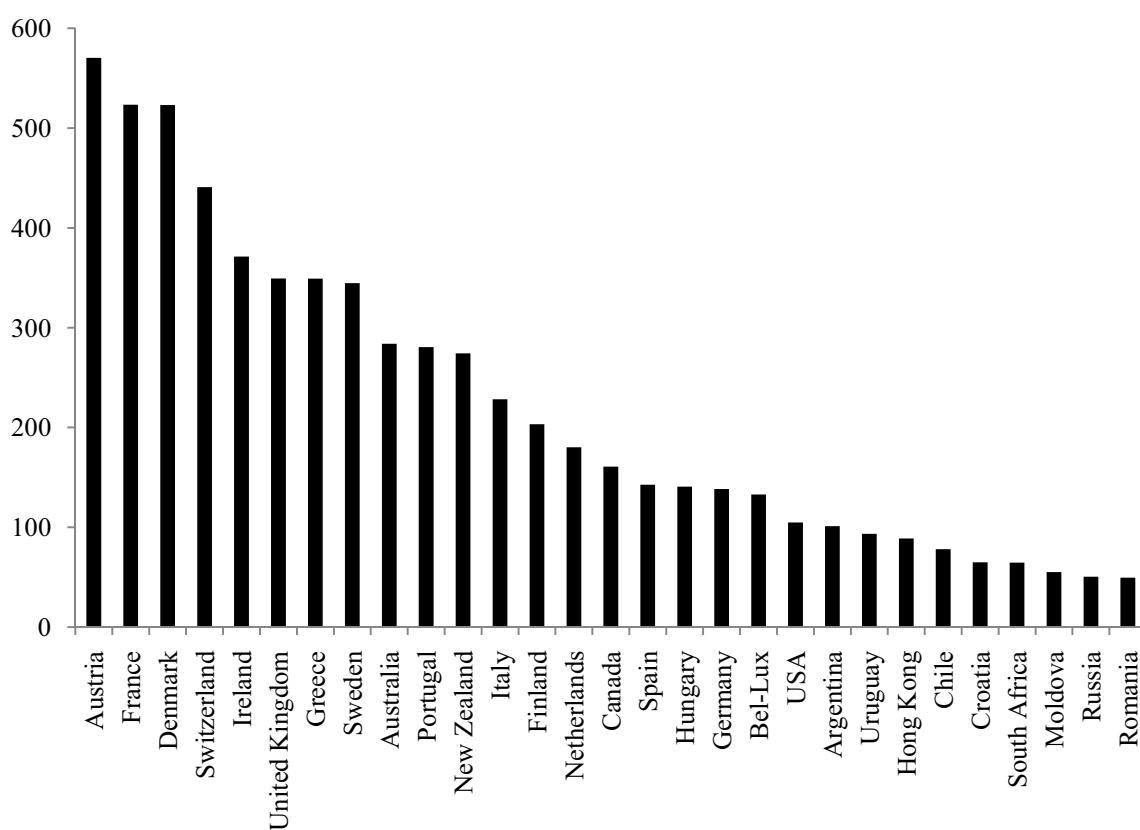
17. Rates of growth in Asian and world grapewine consumption volume and unit value of imports, 2000 to 2009 (% p.a.)



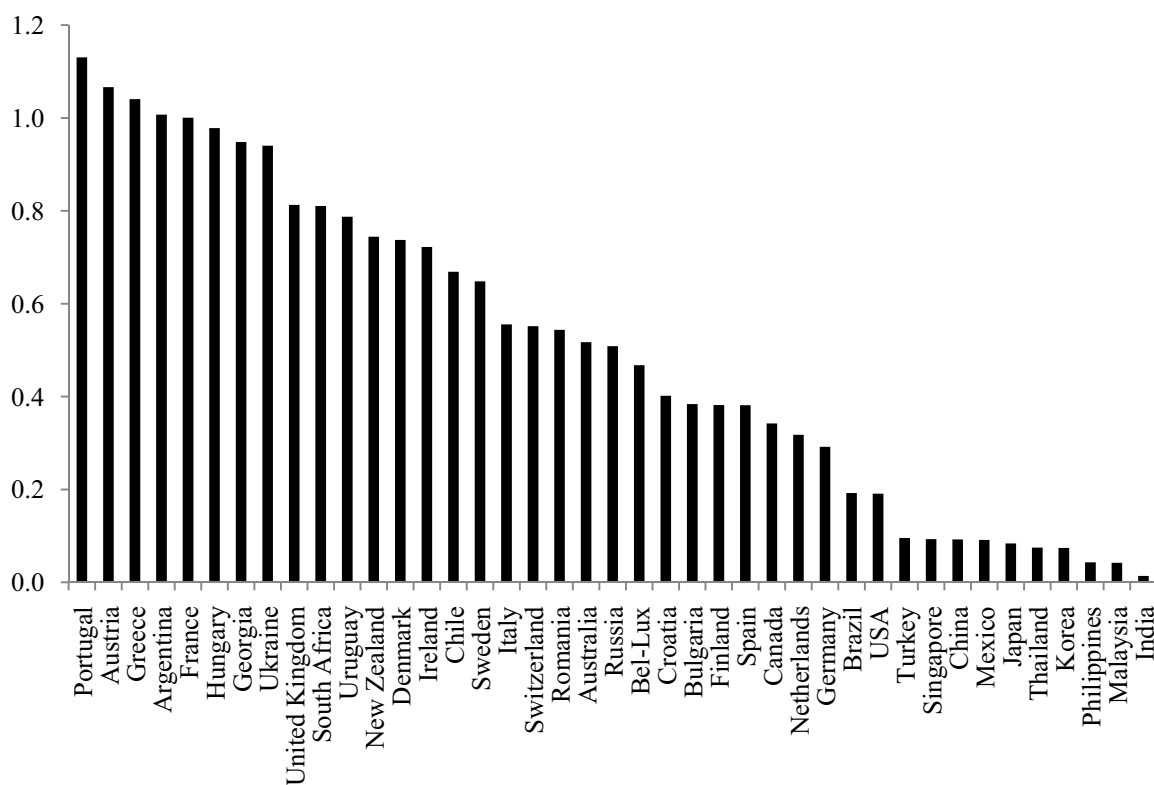
18. Asian grape wine consumption volume, 2000 to 2009 (ML)



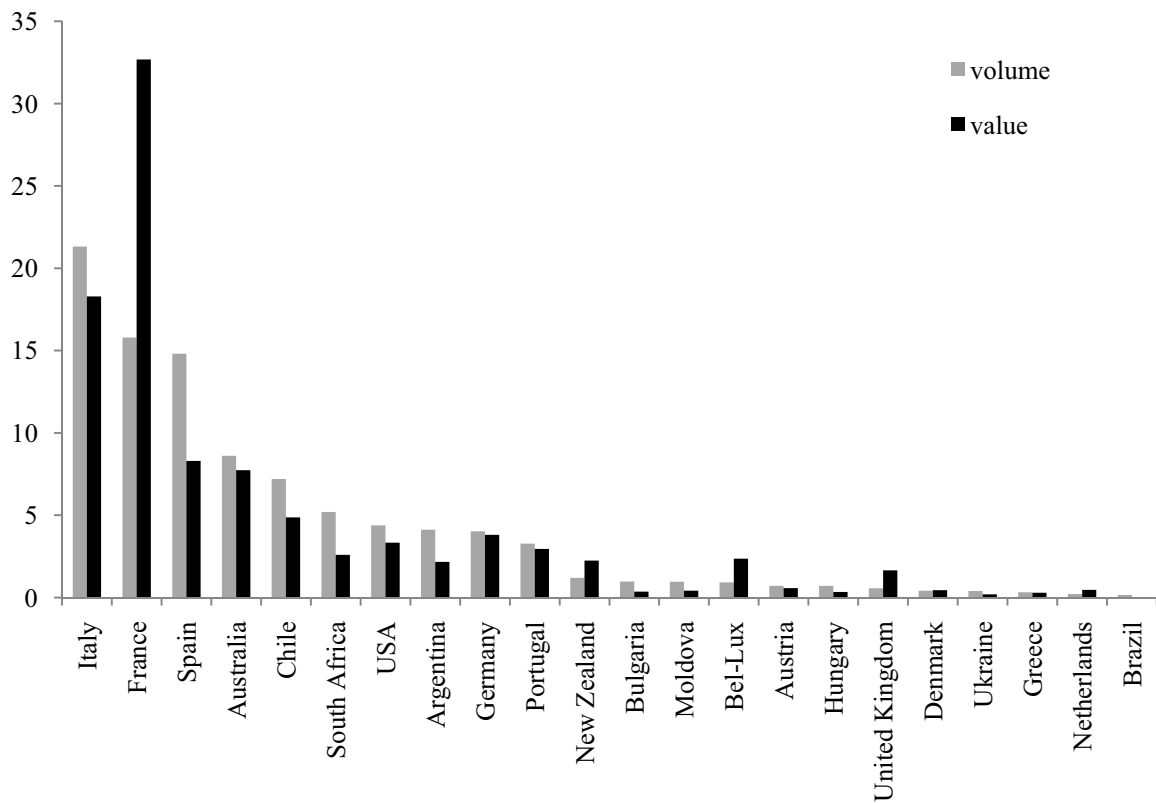
19. Wine expenditure per adult, 2009 (US\$ per year)



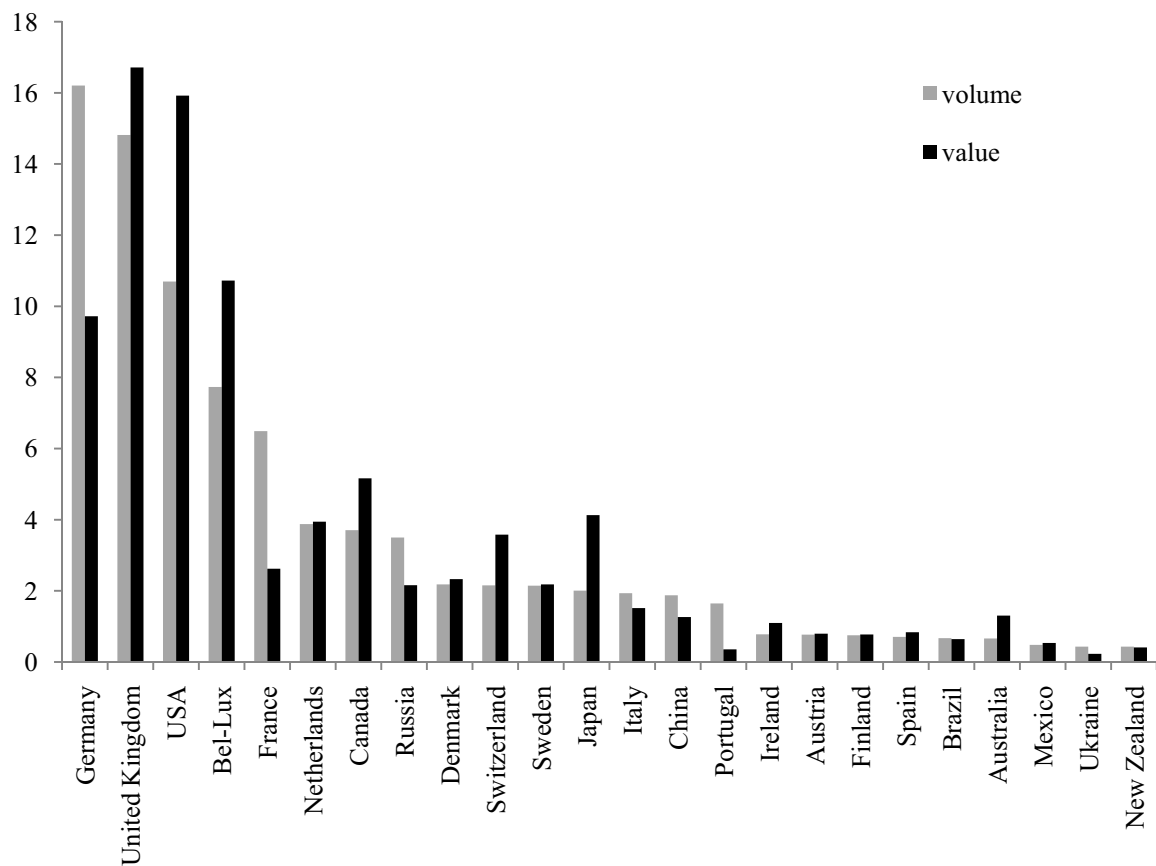
20. Wine expenditure as % of national income, 2009
(Moldova (2.9%) is not shown)



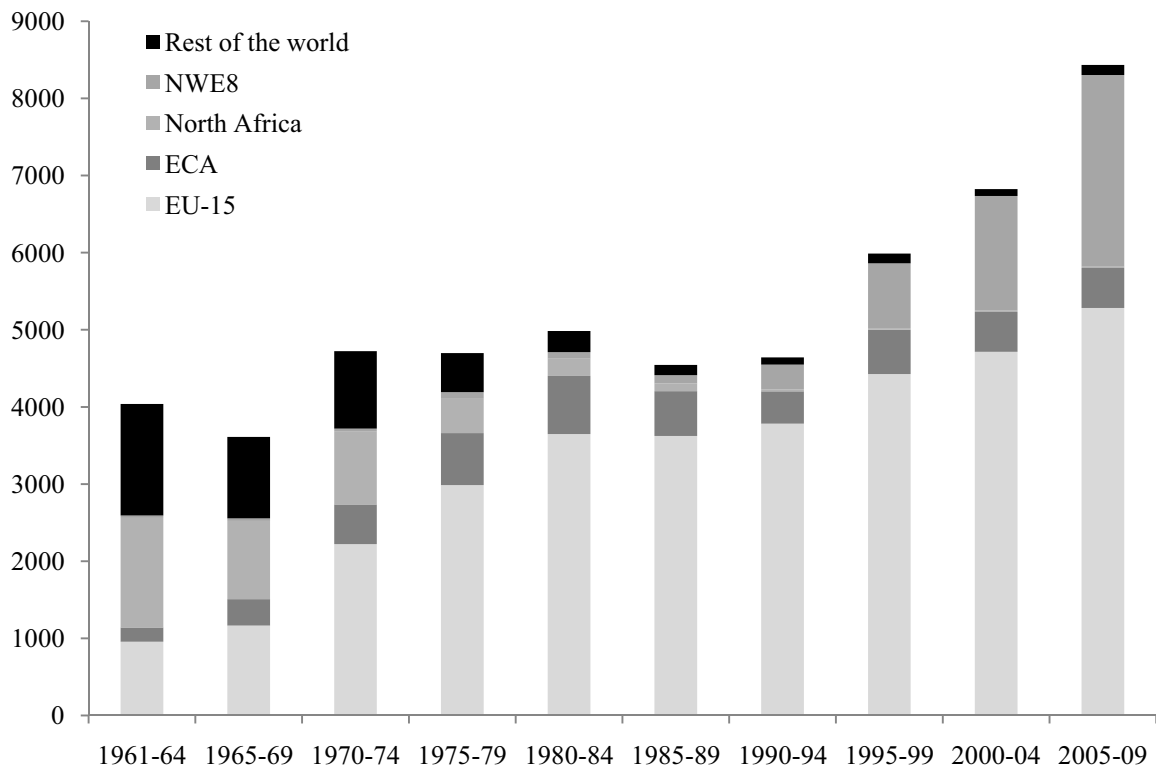
21. National shares of world wine export volume and value, 2007-09 (%)



22. National shares of world wine import volume and value, 2007-09 (%)

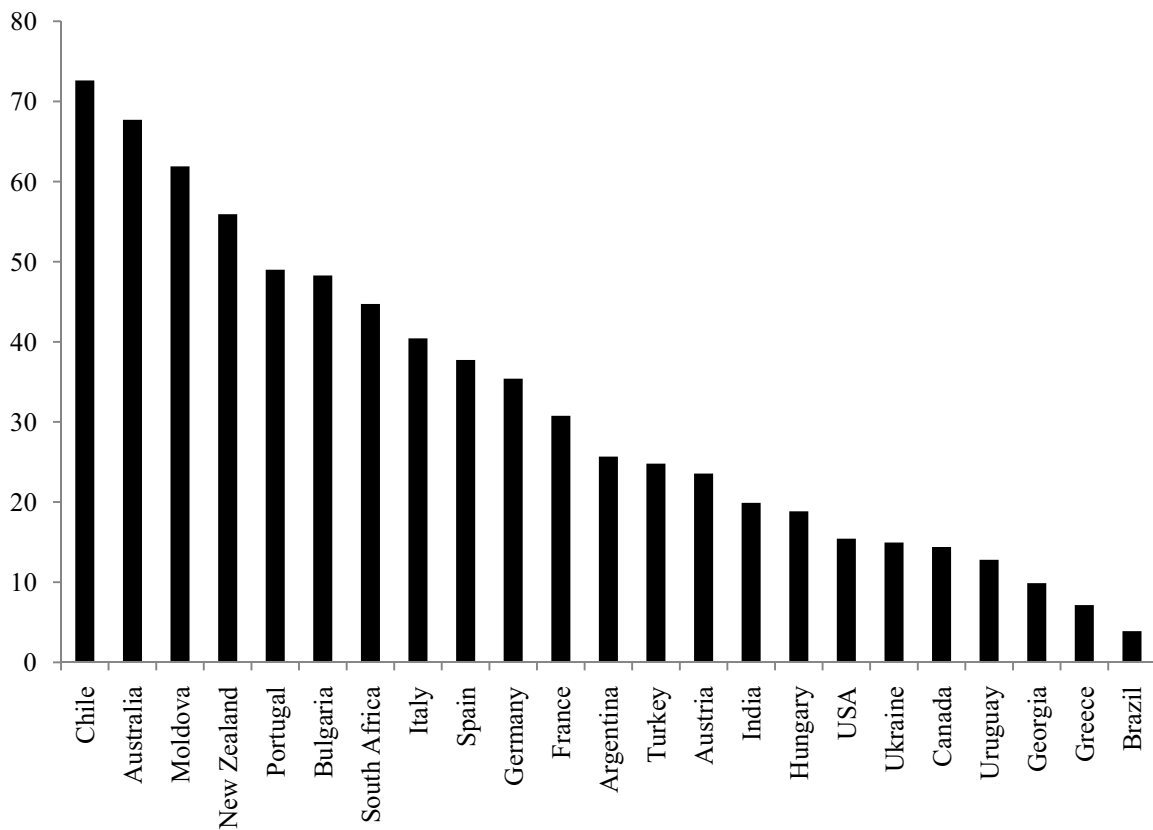


23. Volume of world wine exports, 1961-64 to 2005-09 (ML)

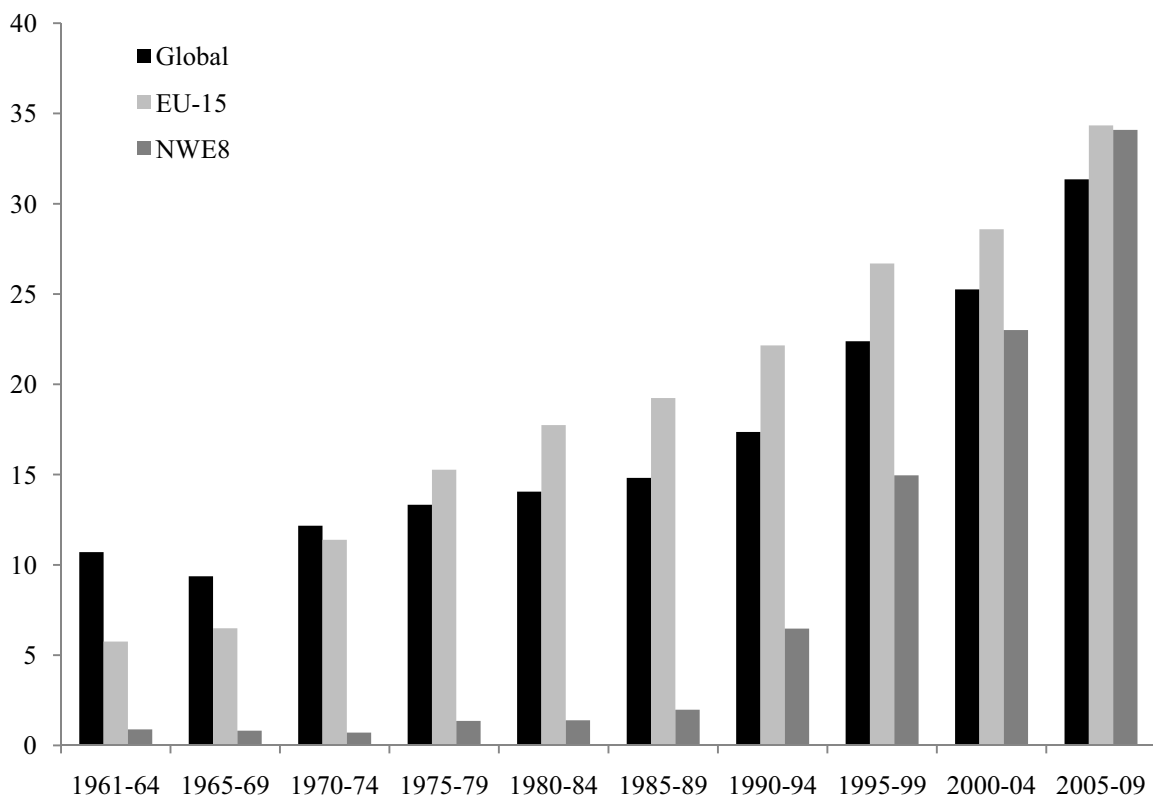


24. Volume of world (excluding intra-EU-15) wine exports, 1961-64 to 2005-09 (ML)

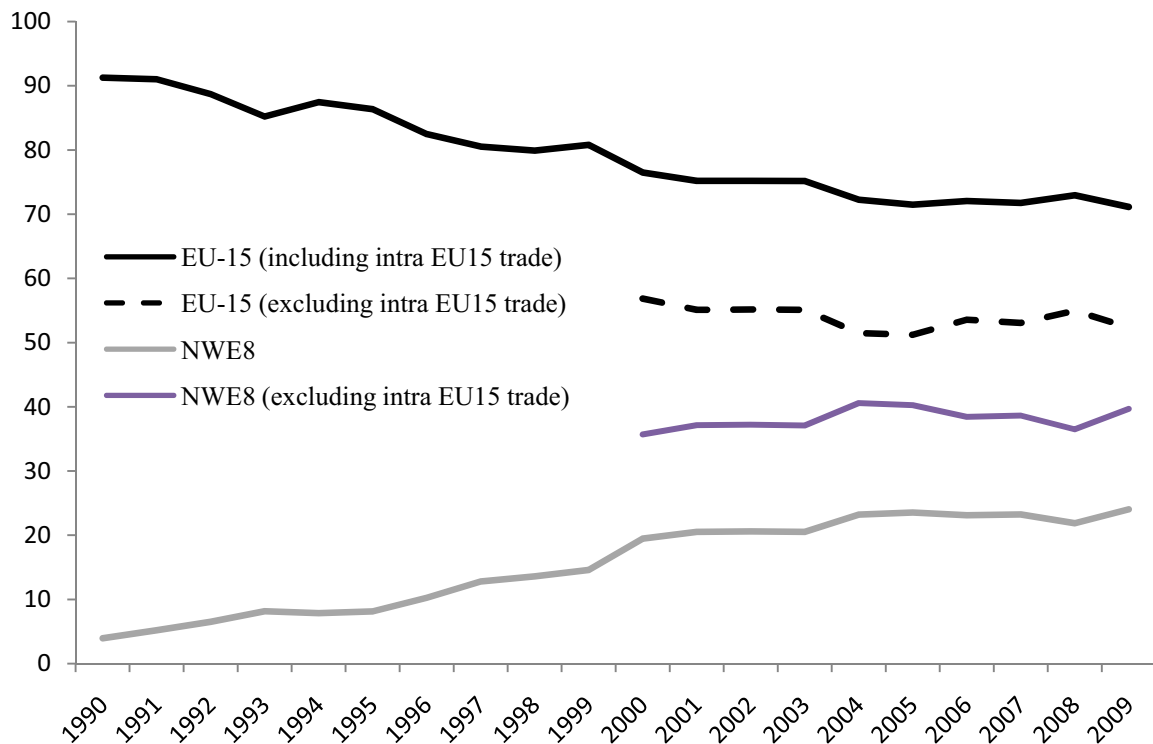
25. Exports as % of national wine production volume, 2007-09



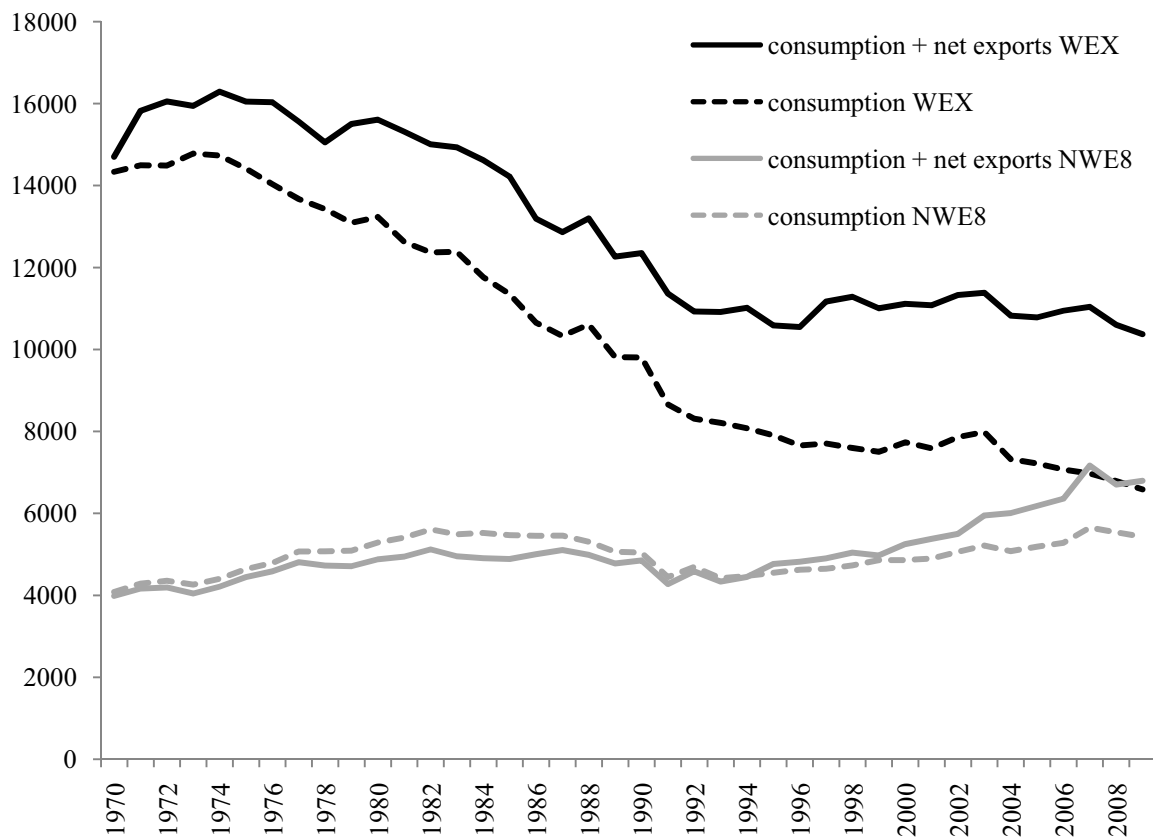
26. Exports as % of wine production volume in EU-15, New World and globally, 1961-64 to 2005-09



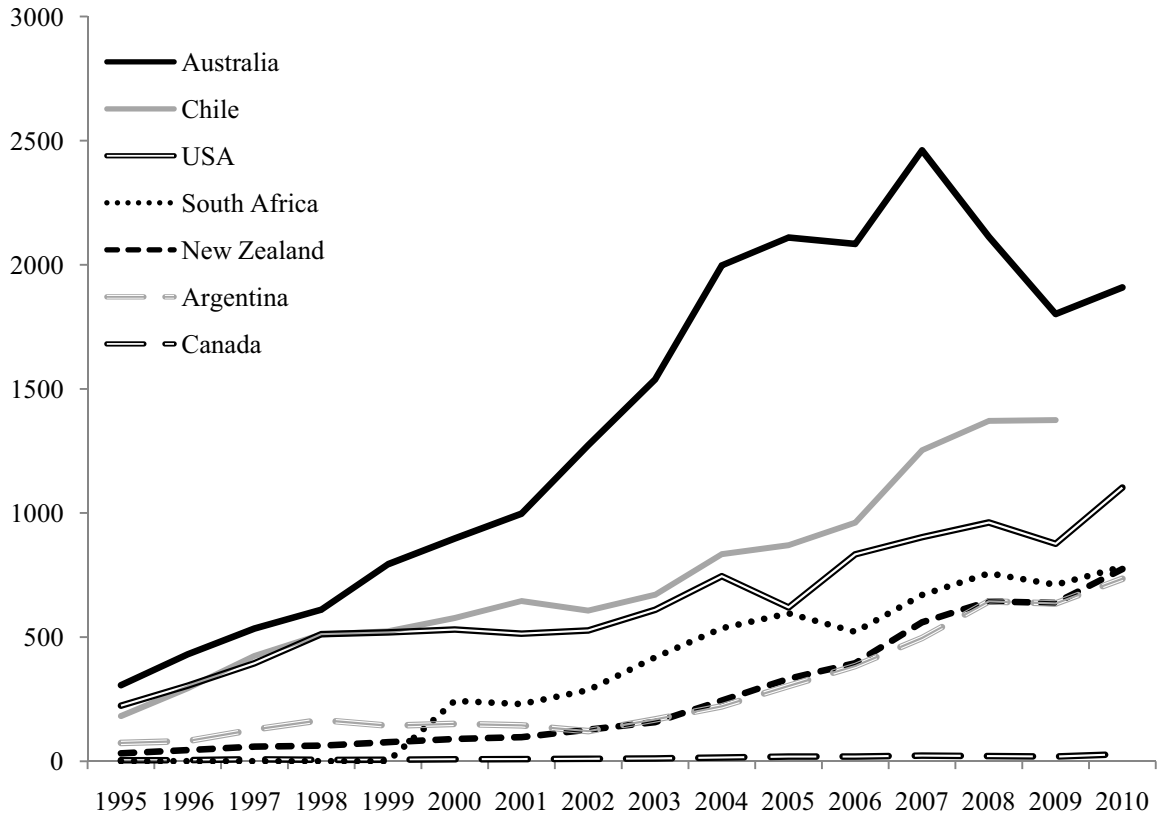
27. EU-15 and New World shares of world wine export value, 1990 to 2009 (%)



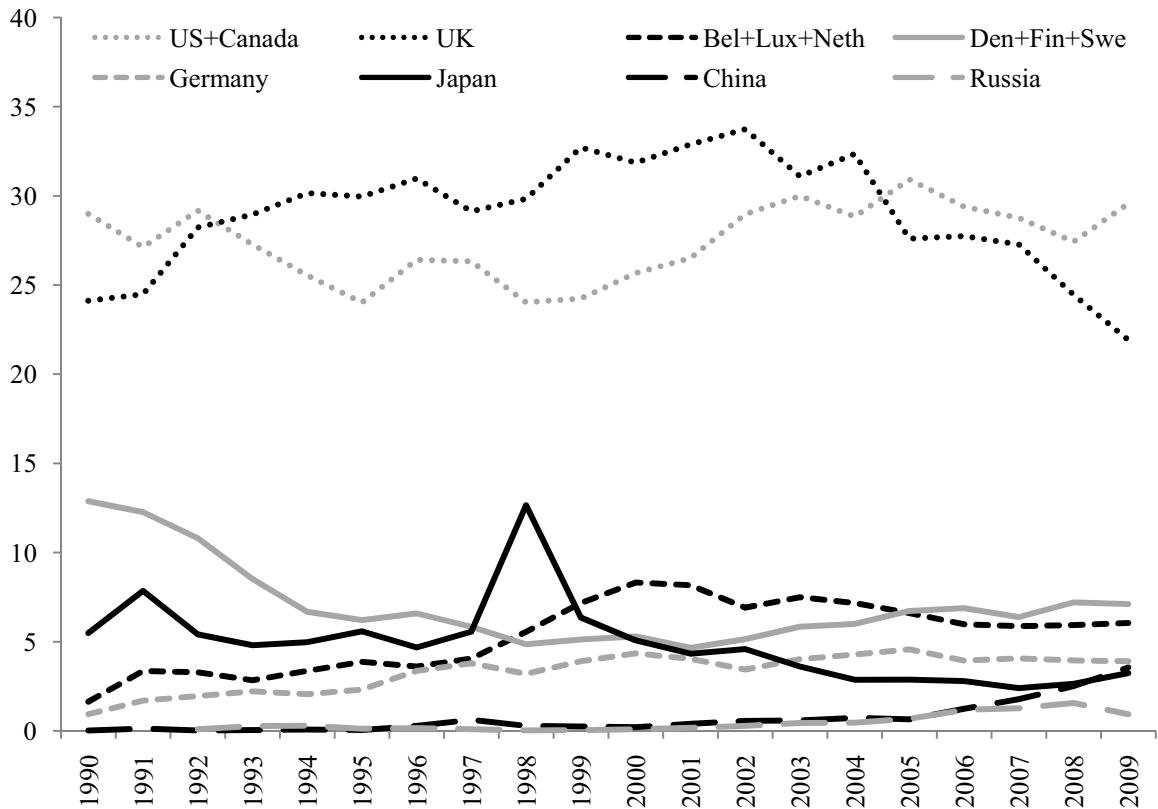
28. Wine consumption and net exports, traditional European and New World exporters, 1970 to 2009 (ML)



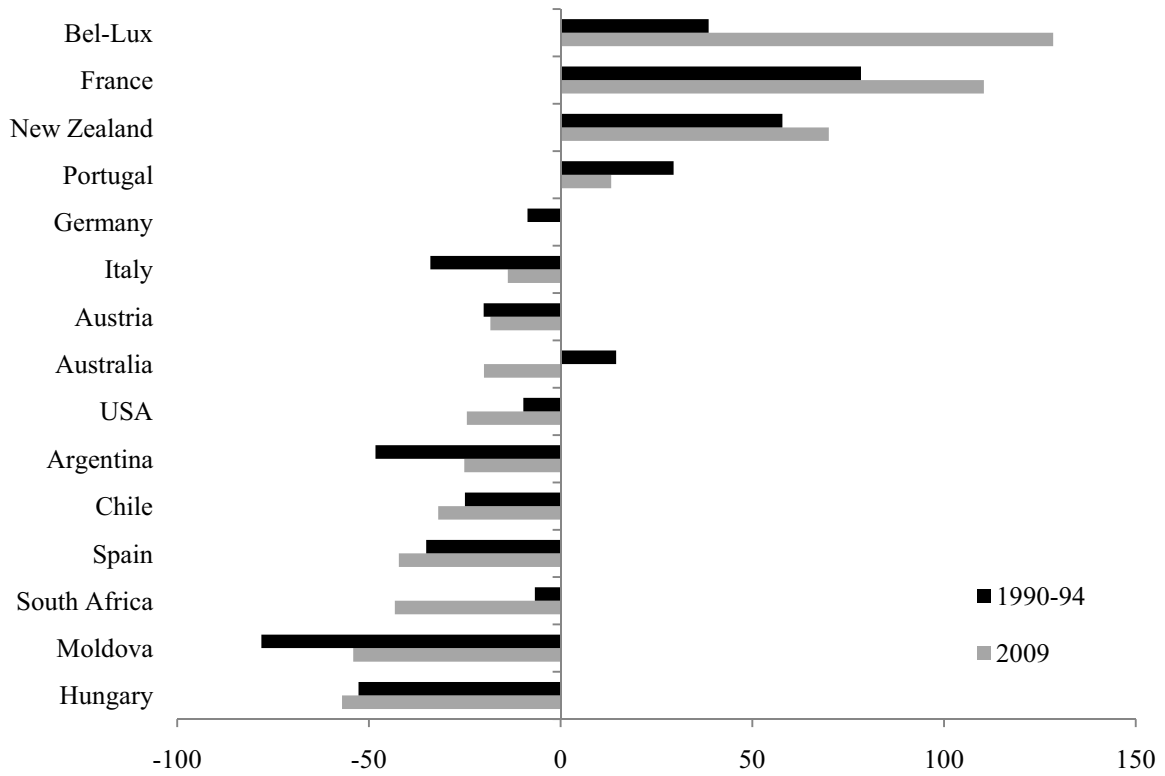
29. Value of New World countries' wine exports, 1995 to 2010 (current US\$ million)



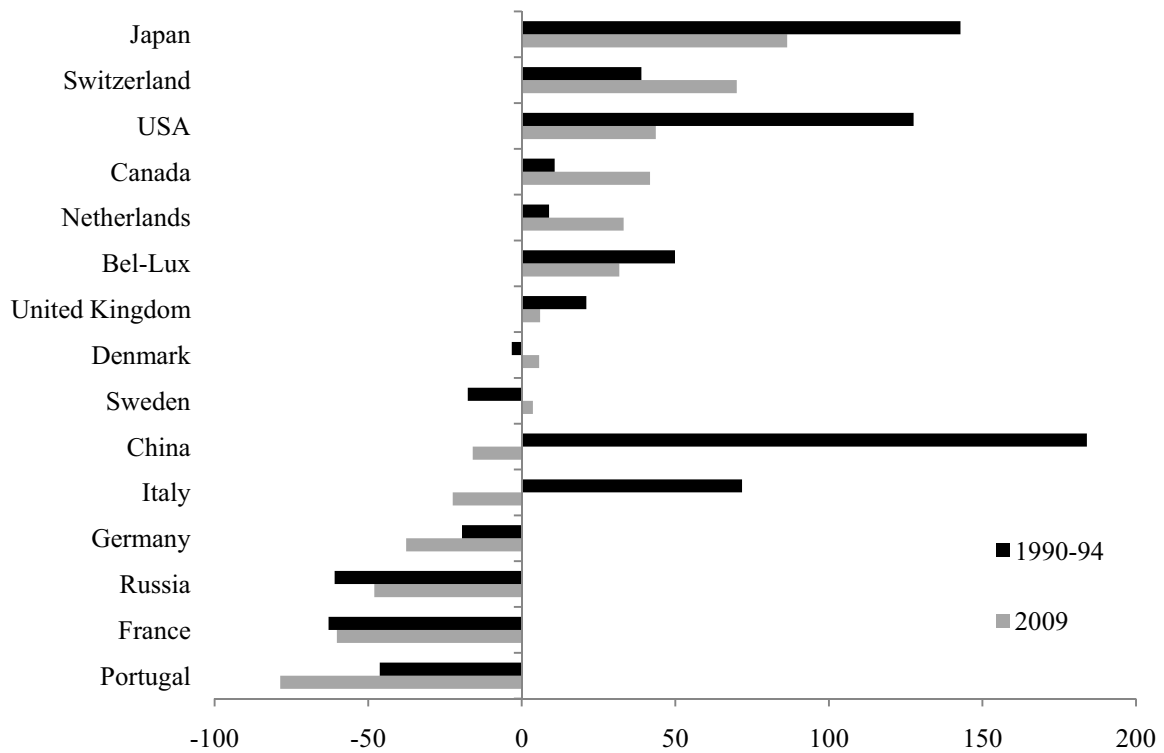
30. Value shares of Southern Hemisphere wines in key import markets, 1990 to 2009 (%)



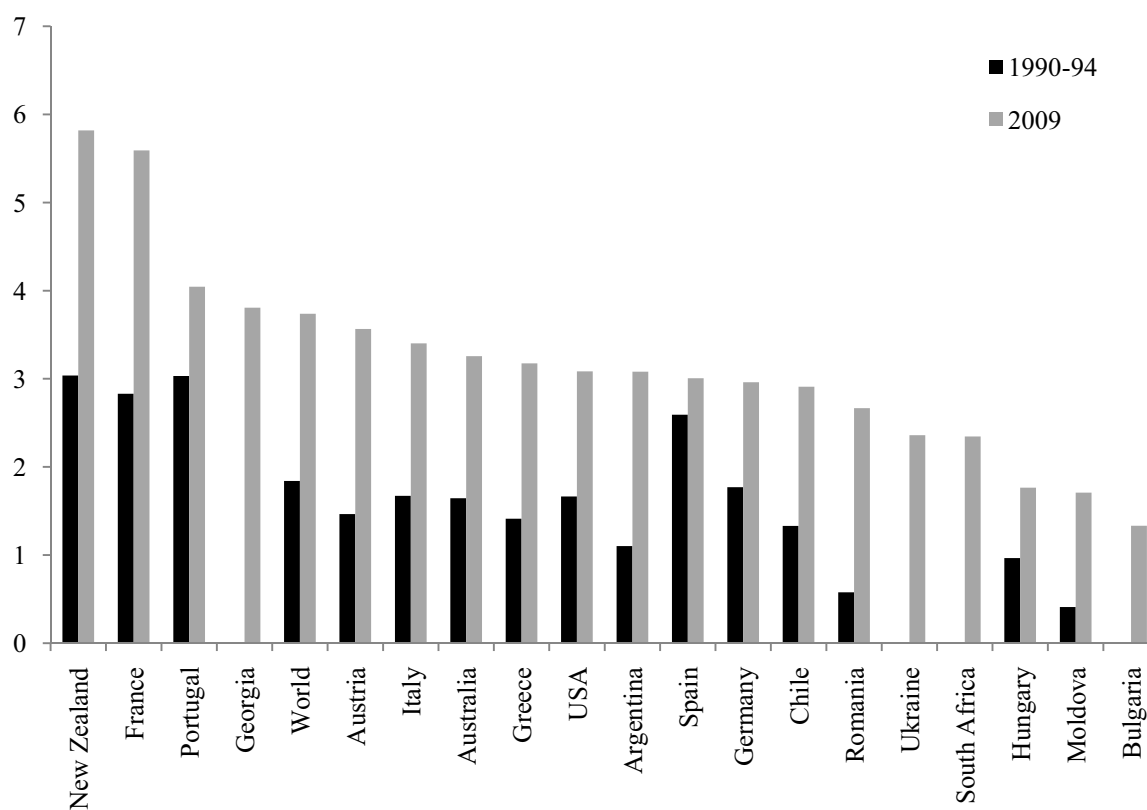
31. National relative to world price of wine exports, 1990-94 and 2009
(unit value of national exports divided by unit value of world exports, minus 1)



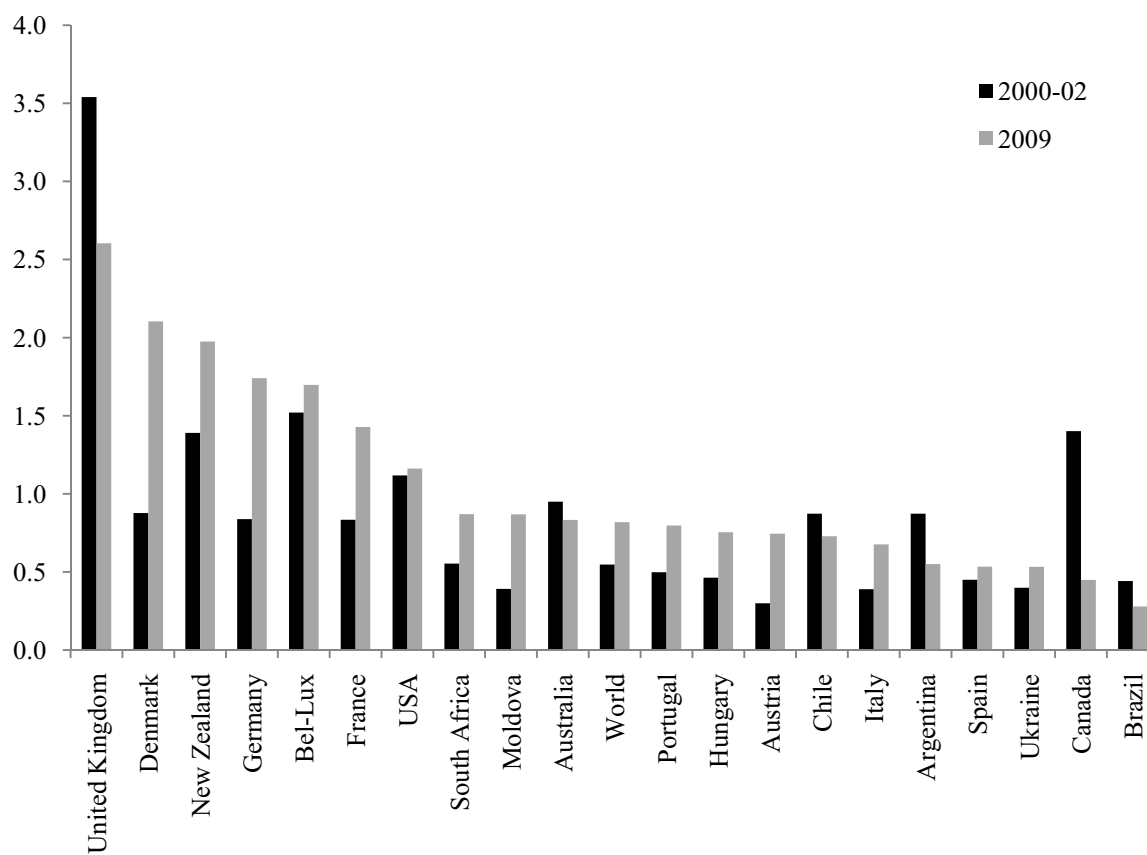
32. National relative to world price of wine imports, 1990-94 and 2009
(unit value of national imports divided by unit value of world imports, minus 1)



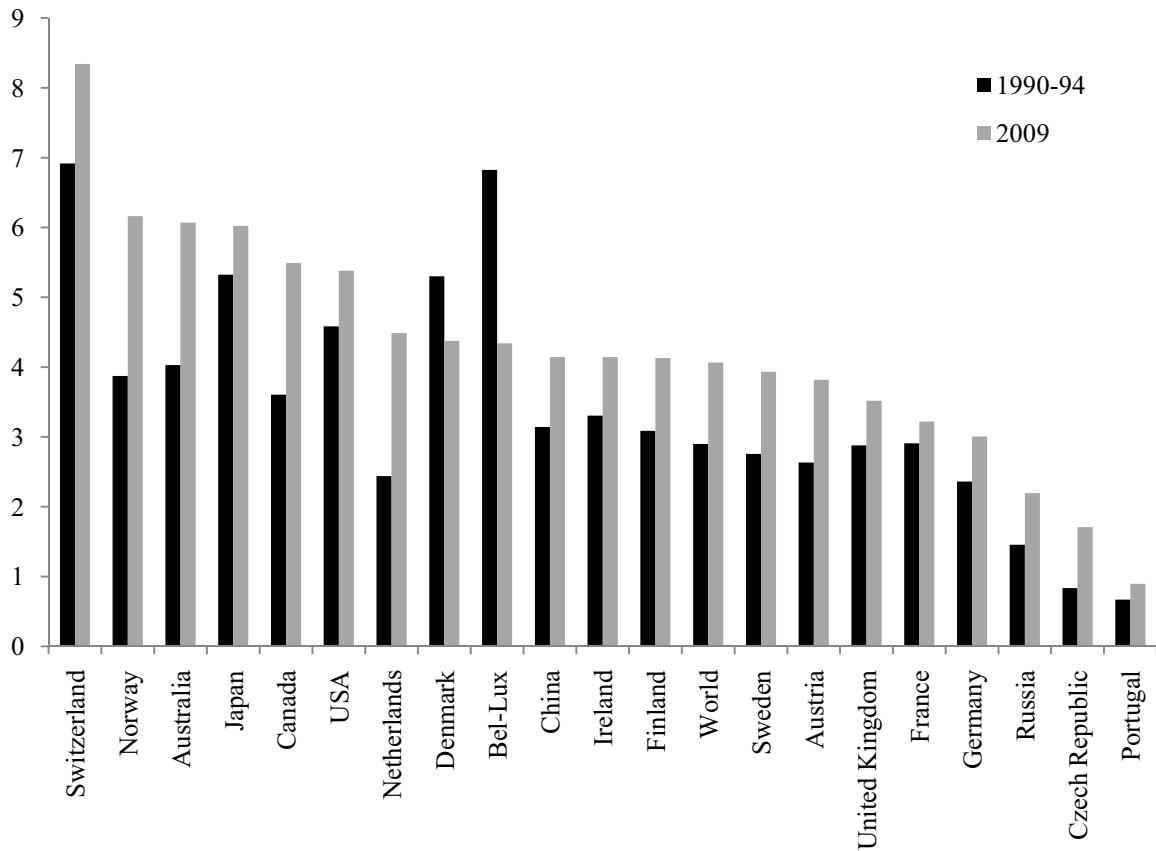
33. Unit value of bottled still wine exports, 1990-94 and 2009 (US\$/litre)



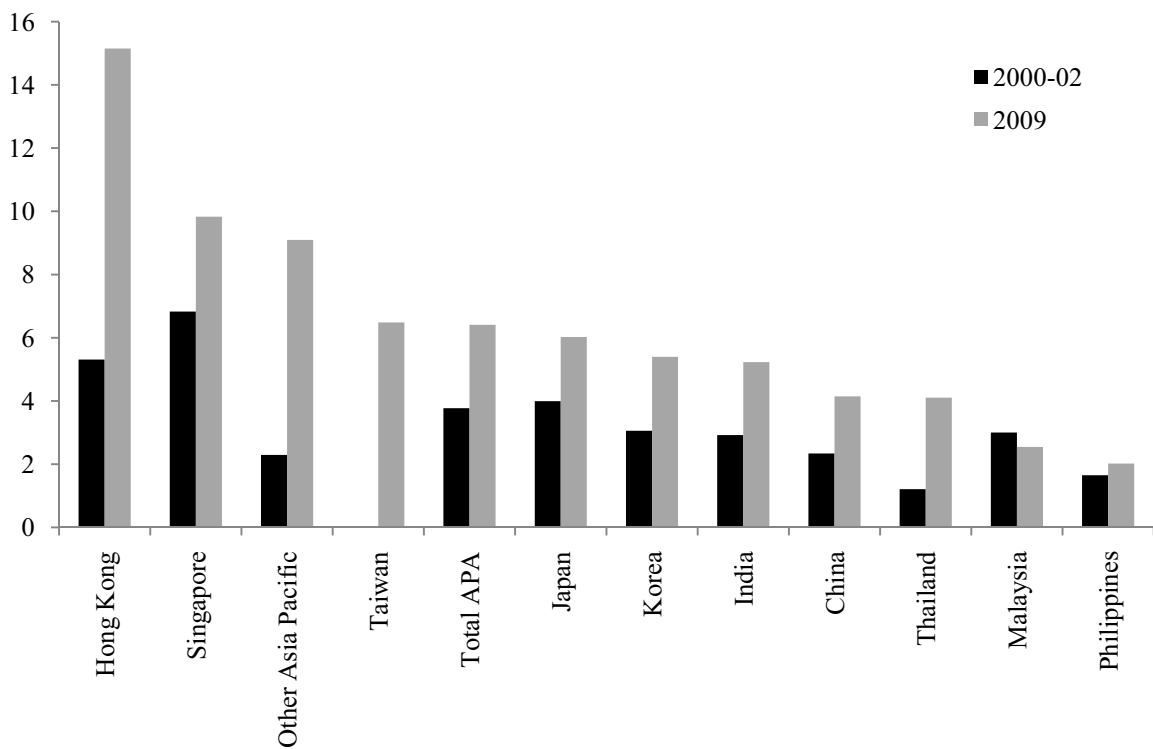
34. Unit value of bulk wine exports, 2000-02 and 2009 (US\$/litre)



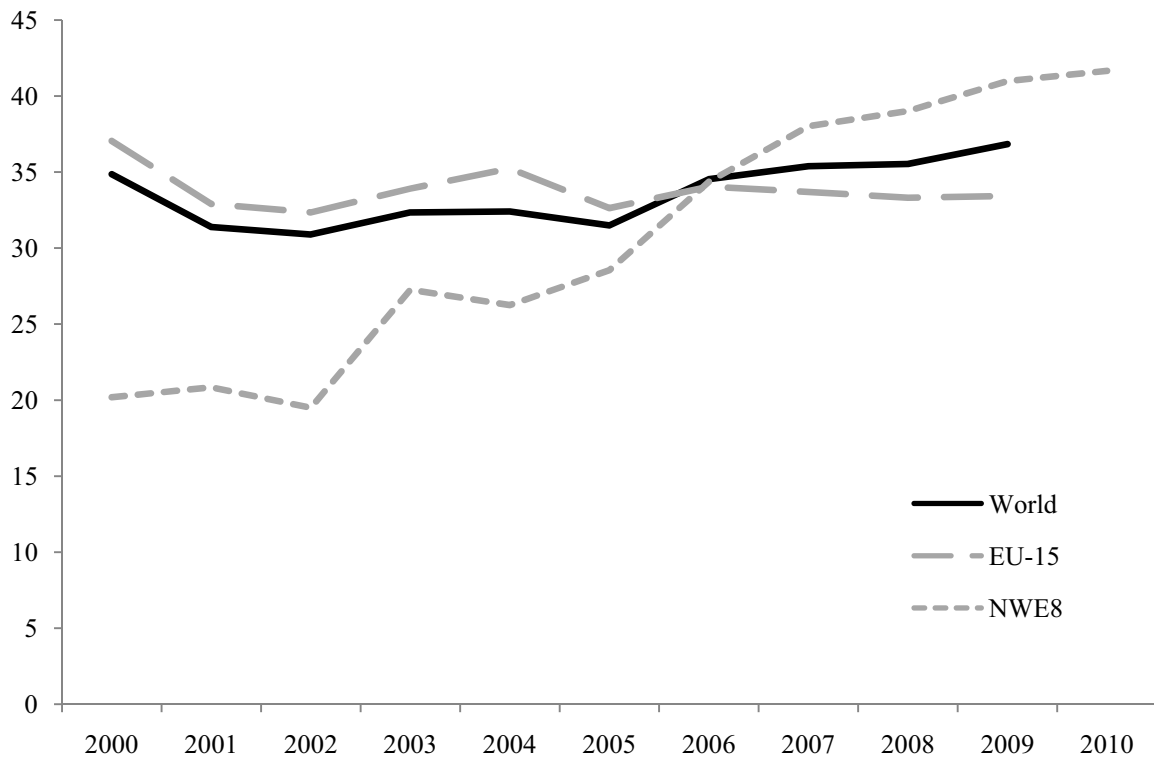
35. Unit value of bottled still wine imports, traditional markets, 1990-94 and 2009 (US\$/litre)



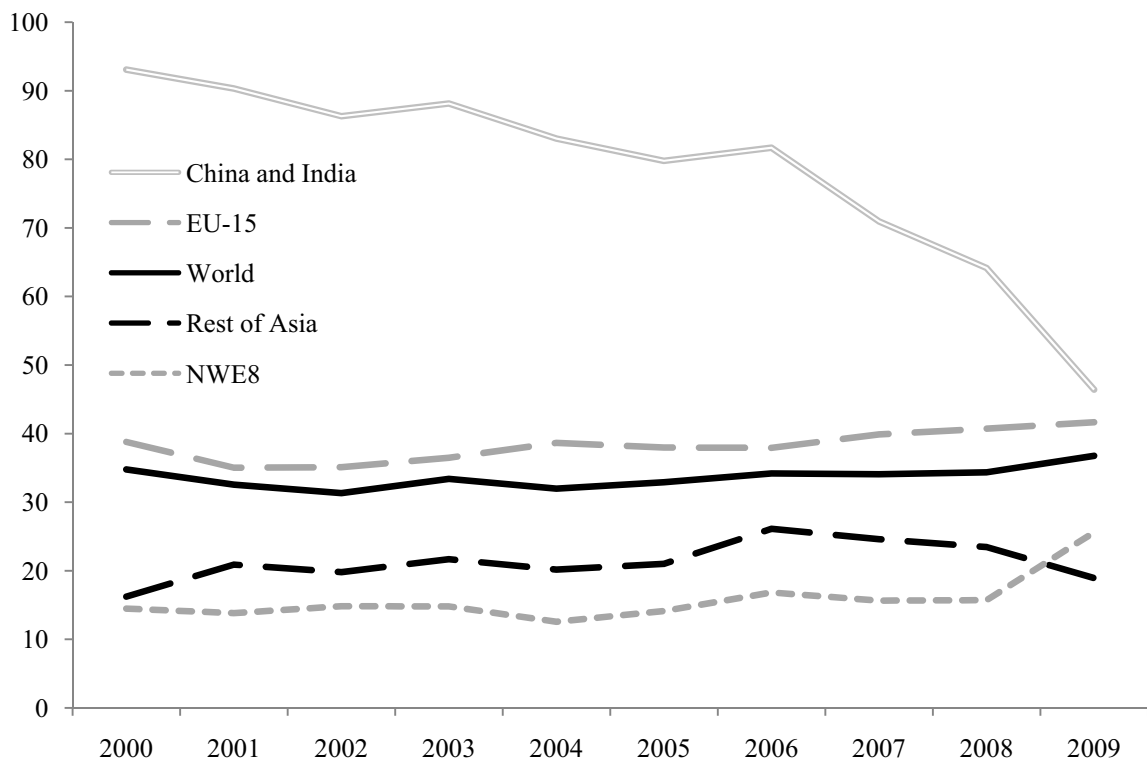
36. Unit value of bottled still wine imports, Asian markets, 2000-02 and 2009 (US\$/litre)



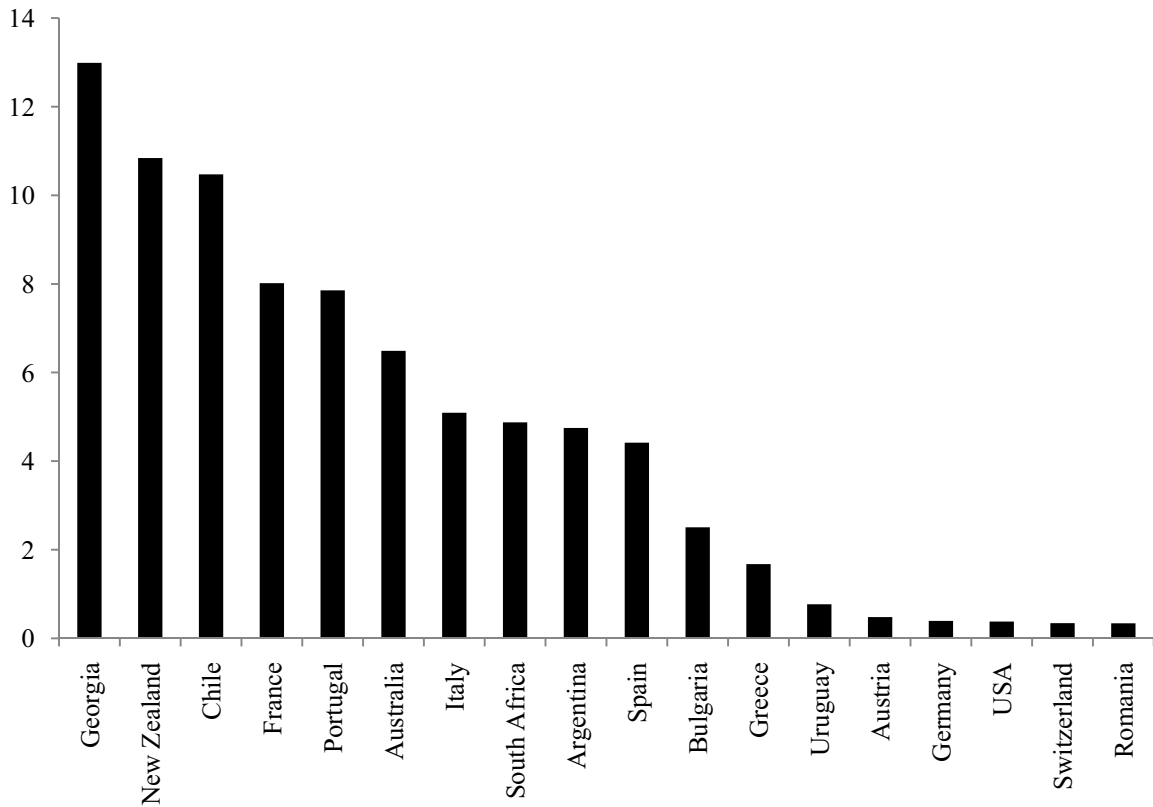
37. Bulk wine as % of total wine export volume, 2000 to 2010



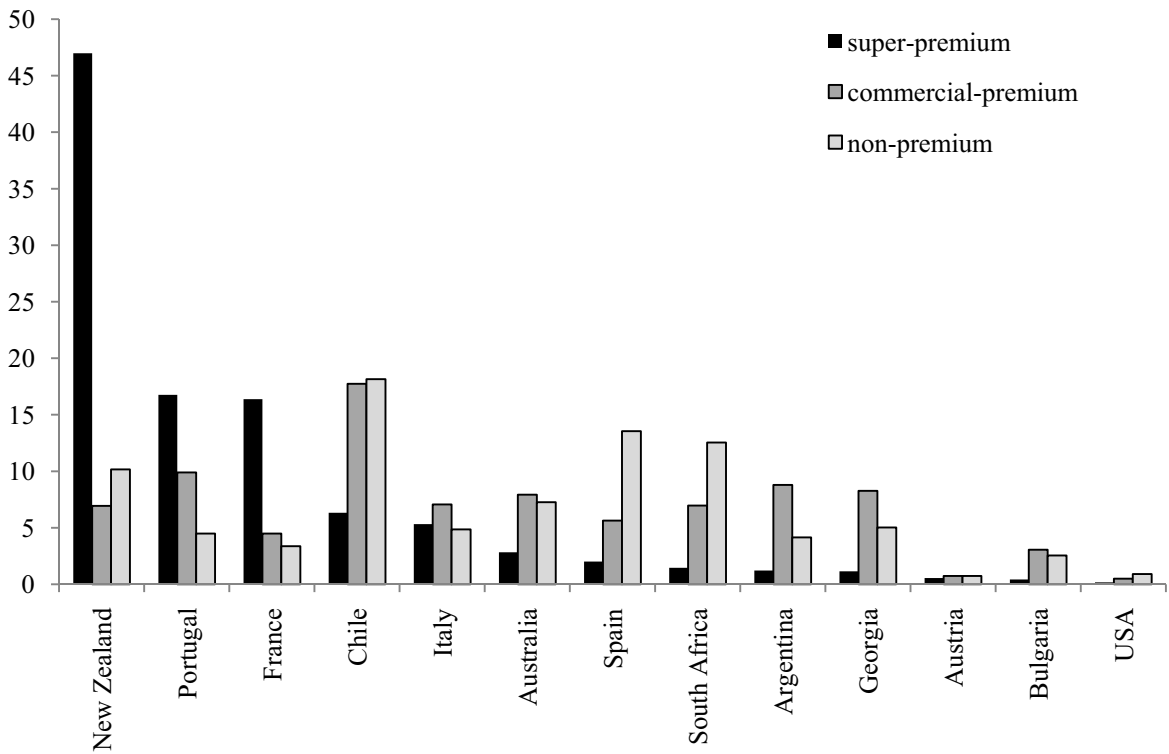
38. Bulk wine as % of total wine import volume, 2000 to 2009



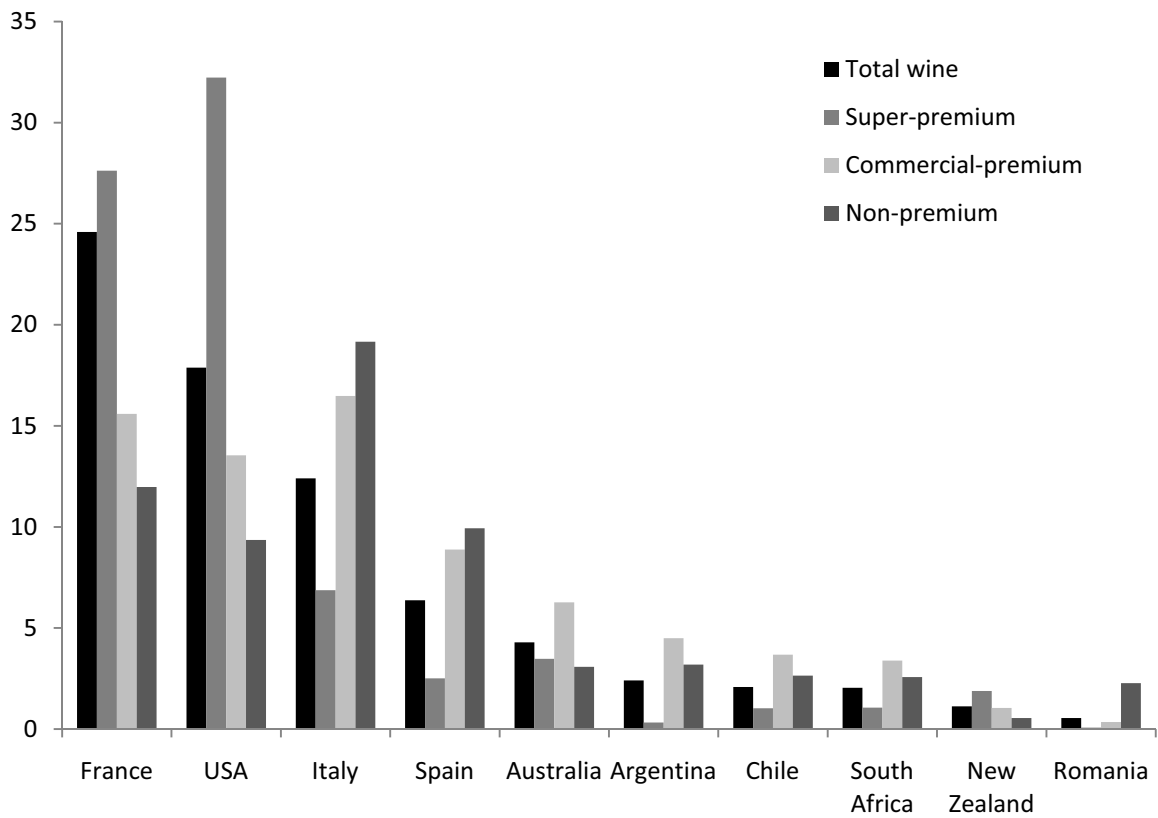
39. Index of revealed comparative advantage in wine, 2007-09
(Moldova, at 39, is not shown)



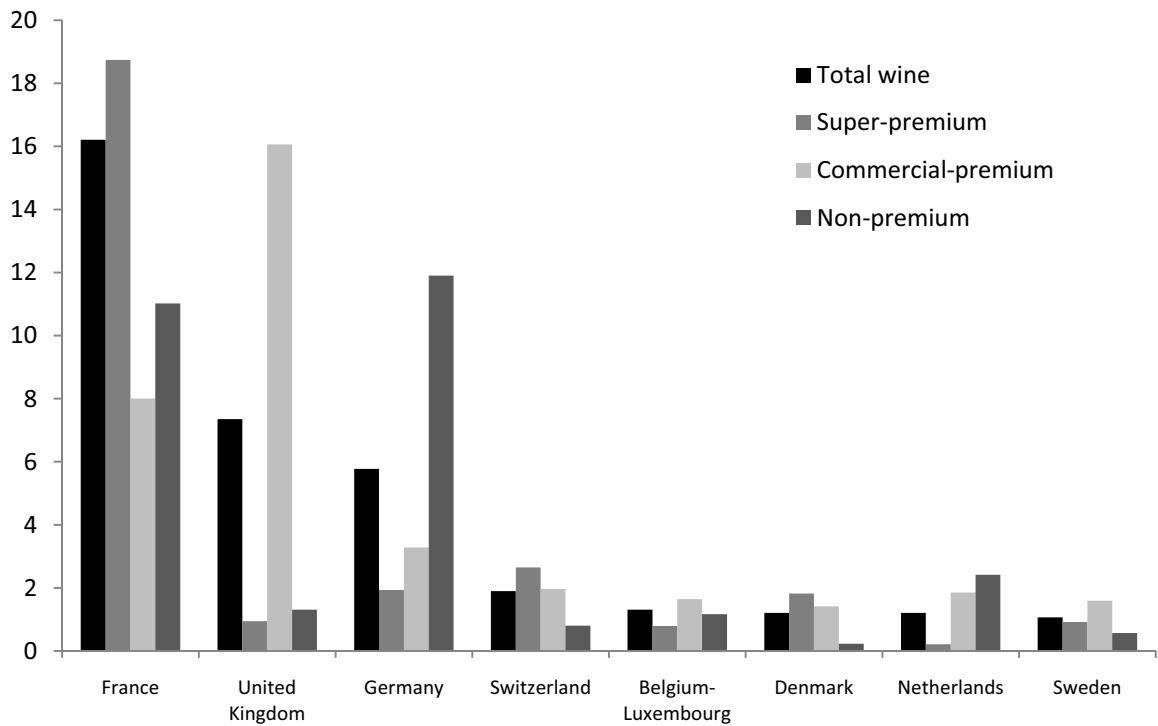
40. Index of revealed comparative advantage in still wine, by quality, 2007-09
(Moldova's non-premium index is very high but not shown)



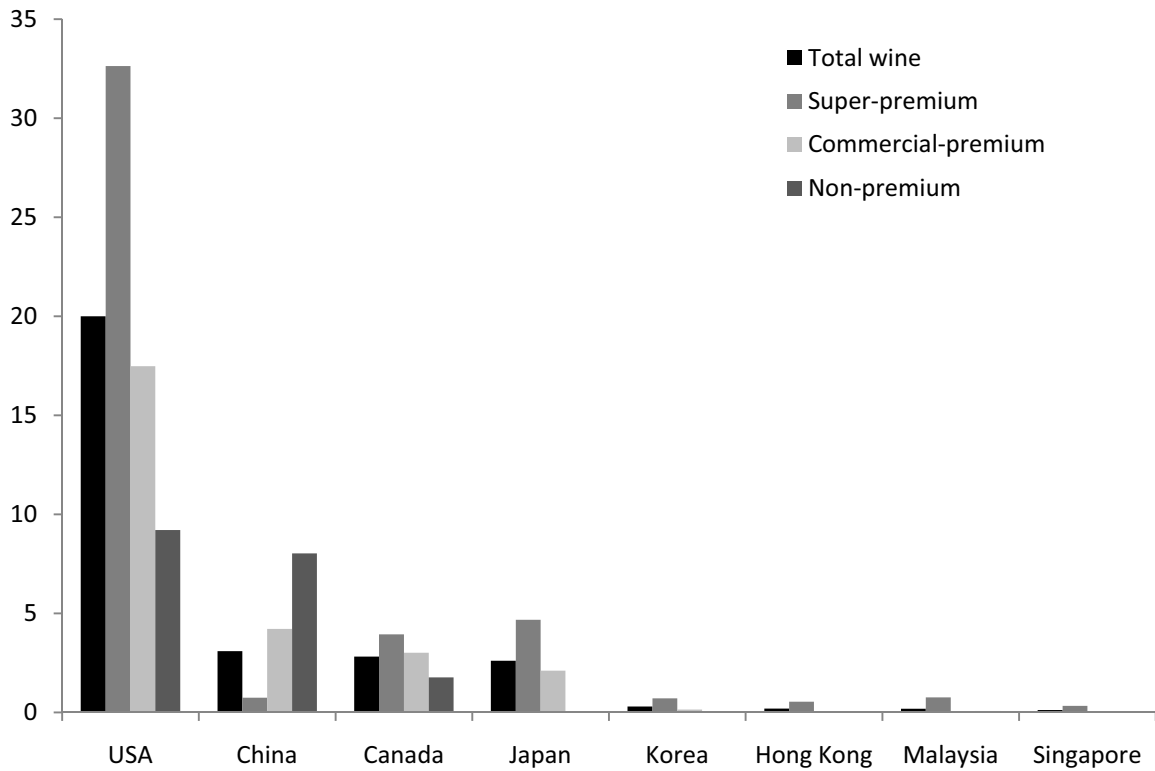
41. Shares of value of world wine production, by quality, 2009 (%)



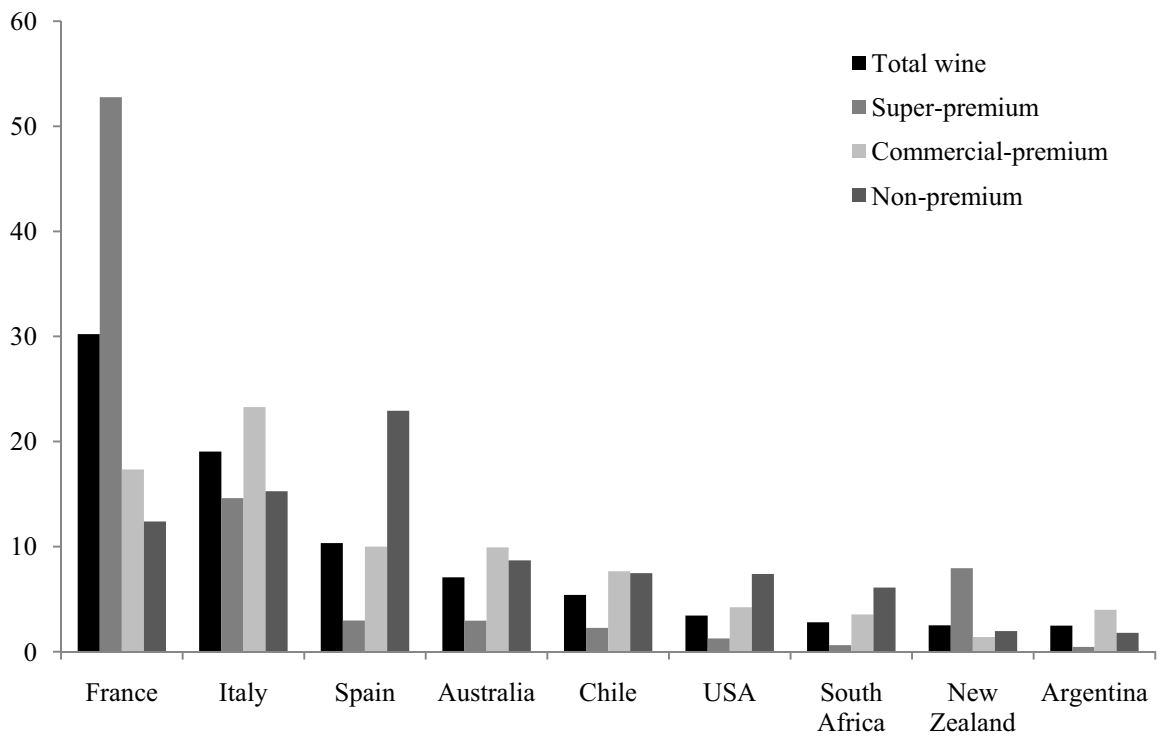
42. Shares of value of world wine consumption, by quality, European countries, 2009 (%)



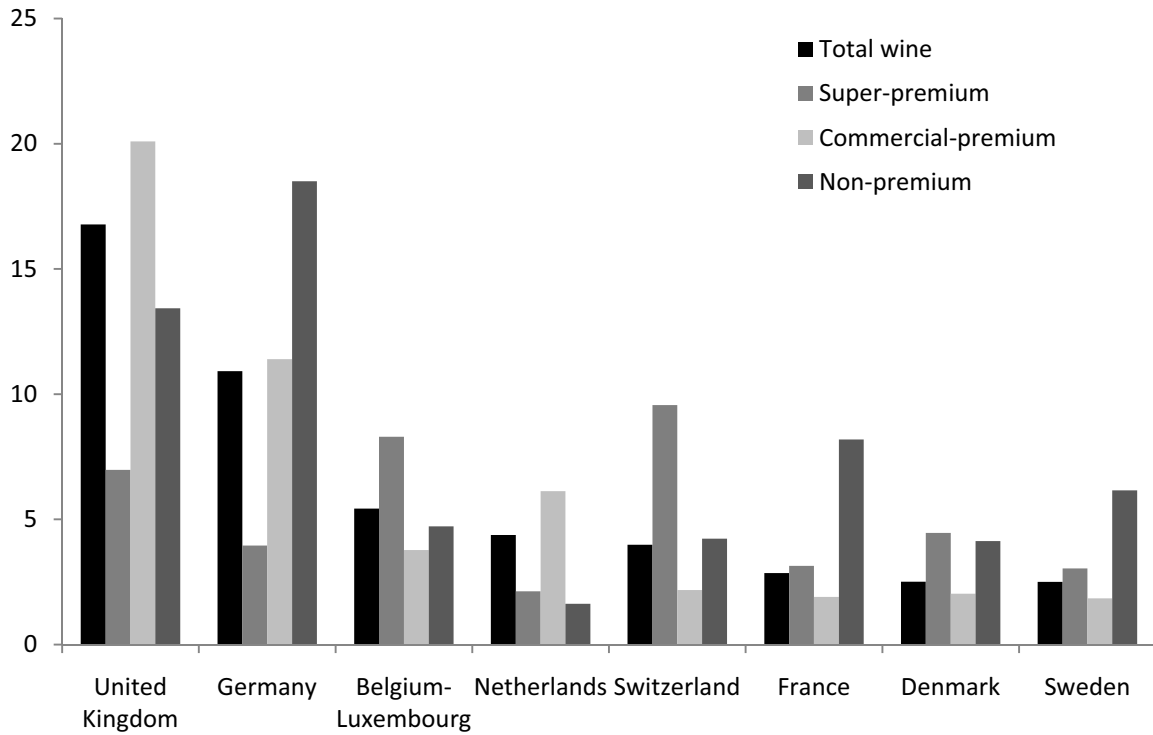
43. Shares of value of world wine consumption, by quality, non-European countries, 2009 (%)



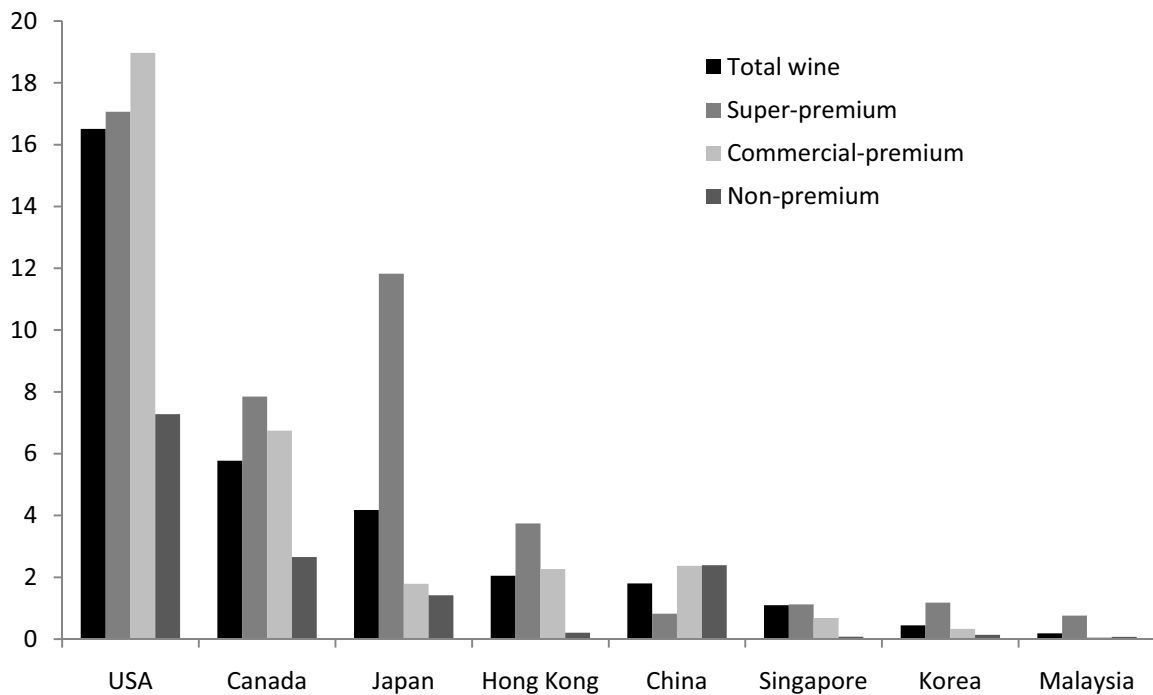
44. Shares of value of world wine exports, by quality, 2009 (%)



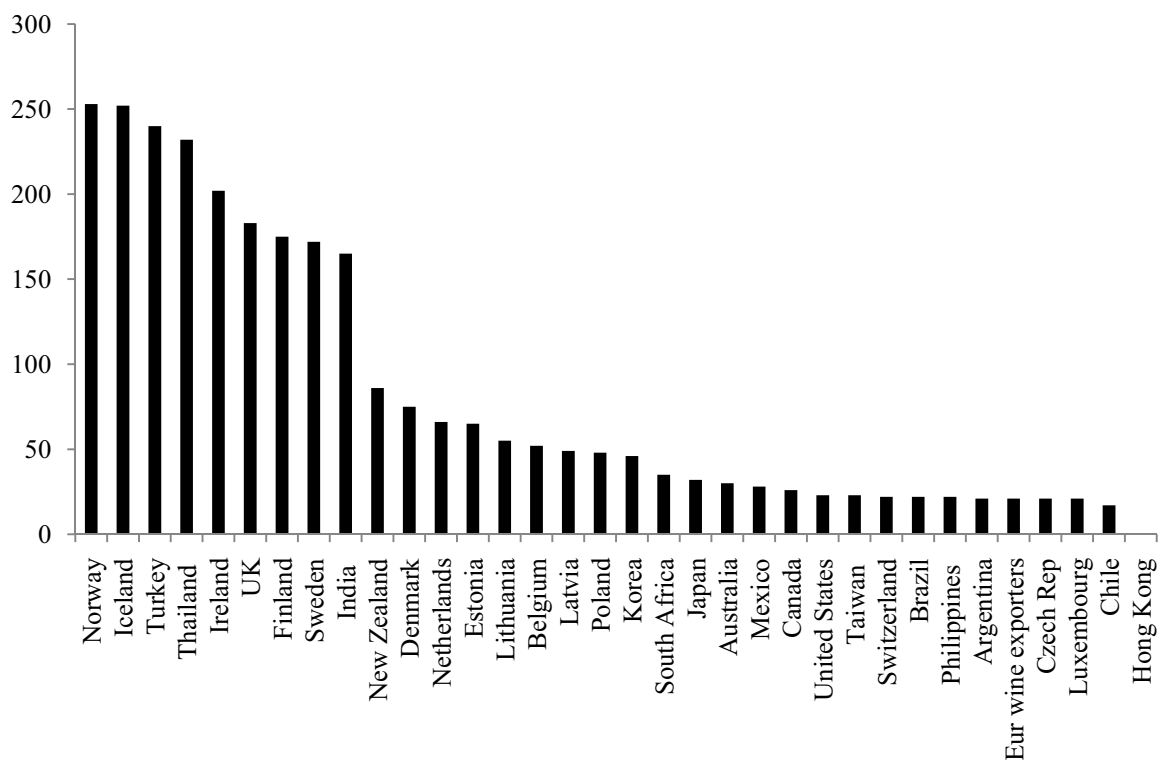
45. Shares of value of world wine imports, by quality, European countries, 2009 (%)



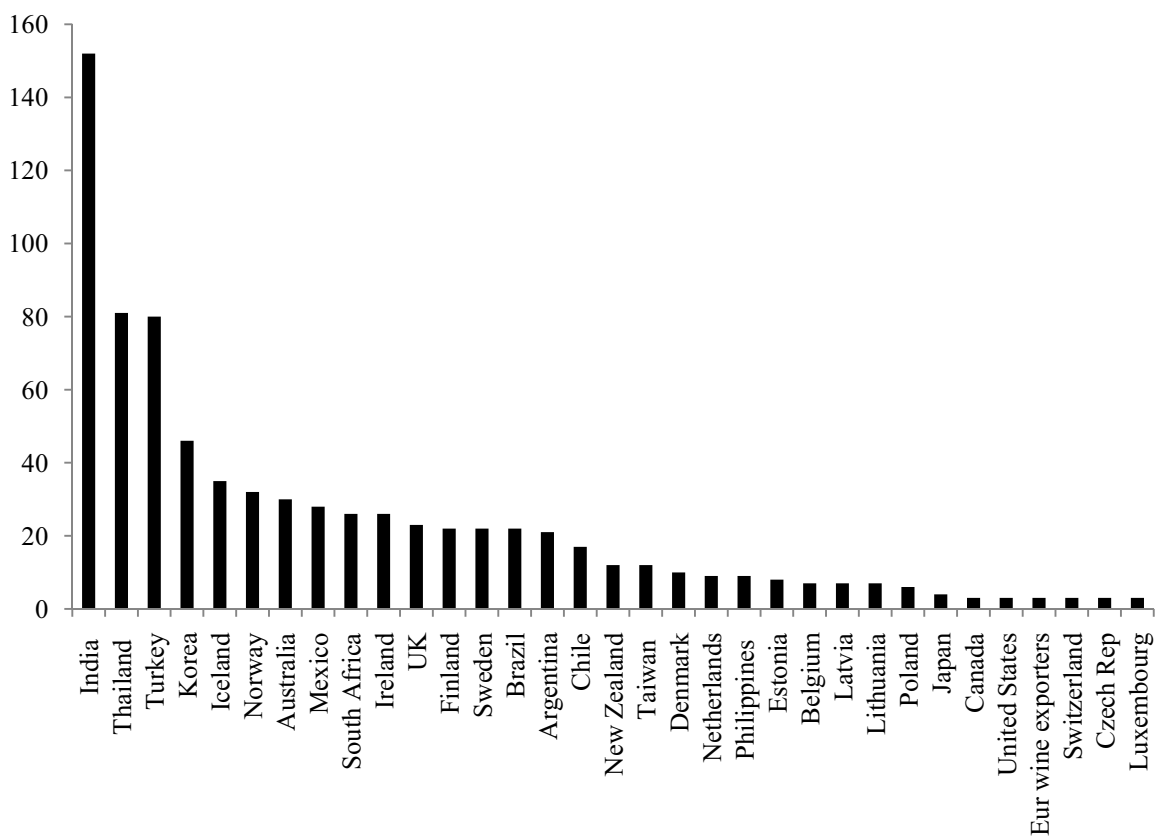
46. Shares of value of world wine imports, by quality, non-European countries, 2009 (%)



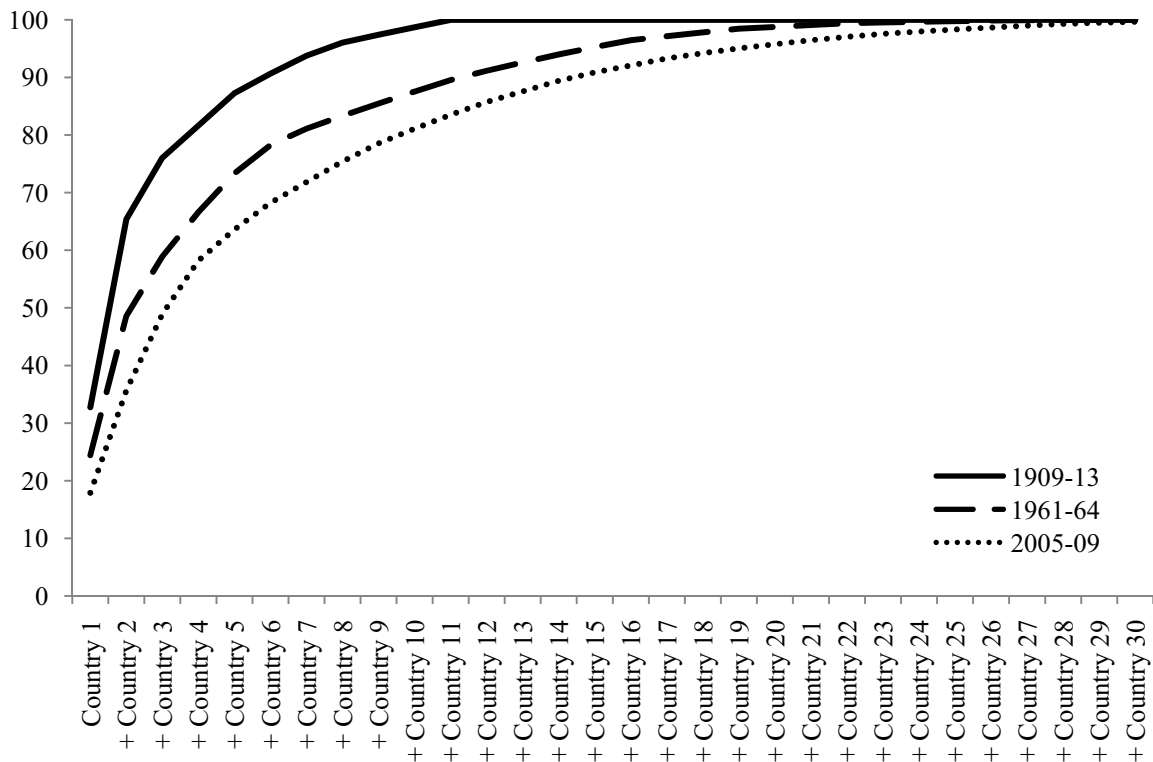
47. Taxes (import plus excise plus VAT) on non-premium wine consumption, 2008
(ad valorem equivalent, %)



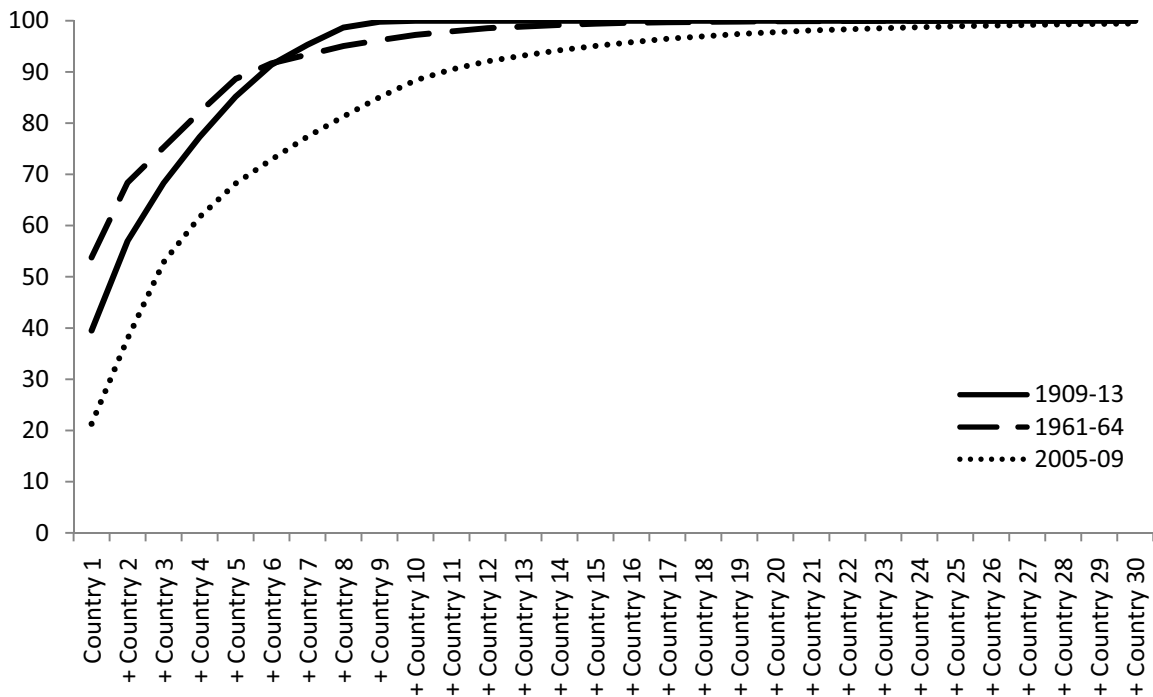
48. Taxes (import plus excise plus VAT) on super-premium wine consumption, 2008
(ad valorem equivalent, %)



49. Cumulative national shares of world wine production volume, 1909-13, 1961-64 and 2005-09 (%)



50. Cumulative national shares of world wine export volume, 1909-13, 1961-64 and 2005-09 (%)



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About the Wine Economics Research Centre

The Wine Economics Research Centre was established in 2010 by the School of Economics and the Wine2030 Network of the University of Adelaide, South Australia, having been previously a research program in the University's Centre for International Economic Studies. Its purpose is to promote and foster its growing research strength in the area of wine economics, and to complement the university's long-established strength in viticulture and oenology research.

The University of Adelaide is the Southern Hemisphere's premier wine research and teaching university and is part of the adjacent Wine Innovation Cluster which includes the University's School of Agriculture, Food and Wine and the Australian Wine Research Institute (established in 1955).

Adelaide is the capital of the state of South Australia, where nearly half of Australia's winegrapes and two-thirds of Australia's wine exports originate. Adelaide has four major wine regions and more than 200 cellar doors within an hour's drive (Adelaide Hills, Barossa Valley, McLaren Vale and Southern Fleurieu/Langhorne Creek), in addition to South Australia's three other key wine regions (Clare Valley, Coonawarra/Limestone Coast and the Riverland). The University of Adelaide is also home to the National Wine Centre of Australia.

The Wine Economics Research Centre is unique in Australia and one of few similar centres around the world. It has close links with the Center for Wine Economics at the Robert Mondavi Institute for Wine and Food Science at the University of California, Davis, and with the American Association of Wine Economists' *Journal of Wine Economics*.

The key objectives of the Wine Economics Research Centre are to:

- publish wine economics research outputs and disseminate them to industry and government as well as academia
- contribute to economics journals, wine industry journals and related publications
- promote collaboration and sharing of information, data and analyses between industry and government agencies as well as research institutions
- sponsor wine economics seminars, workshops and conferences and contribute to other grape and wine meetings

The founding Executive Director of the Wine Economics Research Centre is Professor Kym Anderson. Contact details are as follows:

Wine Economics Research Centre
School of Economics
University of Adelaide
Adelaide SA 5005
Australia
Email: kym.anderson@adelaide.edu.au
Website: www.adelaide.edu.au/wine-econ

[BACK COVER PAGE OF COMPENDIUM]

The first edition of this ground-breaking book (to 2001) was an indispensable part of my reference library, its pages festooned with Post-it markers. The rate and amount of change in global wine markets since then could not have been envisioned by the authors (or anyone else), so while this is technically a revised edition, it is to all intents and purposes a new work, every bit as indispensable as the first edition.

James Halliday, wine critic and author of the *Australian Wine Companion*

Kym Anderson and Signe Nelgen's data track the astonishing changes undergone by the wine world over the last half-century in meticulous detail. This volume should be an essential download for everyone researching, studying or writing about wine.

Andrew Jefford, wine writer for *Decanter* and author of *The New France*

The ever-changing world wine market has progressively become more global and interconnected among nations. To understand these changes it is more important than ever to take a global perspective, which requires information at a global level. This newly expanded and updated statistical compendium will be useful for anyone interested in knowing about and understanding the changing patterns of wine production, consumption and trade in various parts of the world. It is also an invaluable resource for economists and others who seek to analyze those patterns and their underlying causes.

Professor **Julian Alston**, Director of the Robert Mondavi Institute's Center for Wine Economics, University of California, Davis

The authors have revised and expanded what was already an indispensable compendium to another, even higher level.

Professor **Orley Ashenfelter**, Princeton University and founder/author/publisher of the newsletter *Liquid Assets*

Kym Anderson is George Gollin Professor of Economics and foundation Executive Director of the Wine Economics Research Centre at the University of Adelaide. He has published numerous articles on the economics of wine for industry and academic journals as well as a 2004 book on *The World's Wine Markets: Globalization at Work*. He has served on the Board of Directors of Australia's Grape and Wine Research and Development Corporation (2000-05), and is a co-founder and Vice-President of the American Association of Wine Economists and a Co-Editor of the *Journal of Wine Economics*.

Signe Nelgen grew up in a wine-producing family in Germany and is a doctoral student in the School of Economics at the University of Adelaide.