



COMMISSION OF THE EUROPEAN COMMUNITIES

Brussels, 22.12.1998
COM(1998) 791 final

COMMUNICATION FROM THE COMMISSION TO THE COUNCIL

**CONCERNING THE FINAL WINE BALANCE FOR THE 1995/96 WINE
YEAR**

**COMMUNICATION FROM THE COMMISSION TO THE COUNCIL
CONCERNING THE FINAL WINE BALANCE FOR THE 1995/96 WINE
YEAR**

TOTAL PRODUCTION

	1995/96			1994/95			Average 1990/91- 1994/95		
	TW	QW	Other	TW	QW	Other	TW	QW	Other
AU	736	1.471	22						
DE	239	8.122		498	9.908		428	10.374	
GR	3.568	284	23	2.795	223	33	3.267	269	69
ES	10.003	9.960	913	11.001	8.933	1.061	19.169	9.886	1.140
FR	22.812	24.982	6.560	21.919	22.656	8.750	24.208	21.864	8.531
IT	42.311	10.363	3.028	45.795	10.545	2.436	47.871	10.044	2.570
PT	4.227	3.028		3.400	3.121		5.596	2.491	
Other	45	110	10	29	156	10	37	135	16
EUR-15	83.941	58.320	10.556	85.437	55.542	12.290	100.576	55.063	12.326
Total EUR-15		152.817			153.269			167.965	

I. Total production

The figures for the 1995/96 wine year were the first to include Austrian wine production. However, the harvest was down very slightly on the previous year, being the smallest since the introduction of the common organisation of the market in wine at 9% lower than the average for the previous five wine years. Nevertheless, the production of quality wines psr was up, on both the previous year (up 5%) and the average over the previous five years (up 6%). The production of table wine, however, fell 1.8% on the previous year and 16.4% on the average for the previous five years.

II. Utilisation

The balance from the 1995/96 wine year is for EUR-15, since the market organisation rules were applied immediately in the new Member States, Austria, Finland and Sweden. Total utilisation in EUR-15 in the 1995/96 wine year, comprising human consumption, industrial uses (including juices), losses, Community distillation and net exports to third countries, was 151 823 hl.

1. Human consumption

Direct human consumption in EUR-15 in 1995/96 totalled 129 million hl, 2.5% down on both the previous year and the average over the 1990/91 to 1994/95 wine years. It is interesting to see that consumption continues to grow in the non-producer countries (+11% in Belgium, +7% in the United Kingdom, +22% in Ireland and +8% in the Netherlands) while falling in the producer countries (-2,6% in Greece, -9,5% in Spain, -4,3% in France, -3,3% in Italy and -2,3% in Portugal).

The fall in total consumption is due to the fact that the continuing positive trend in the consumption of quality wines psr (+1%) was not enough to offset the fall in the consumption of table wine (-1.9%). This becomes even clearer when one looks at the average for the last five wine years: an increase of 4.2% in the consumption of quality wines psr and a fall of 7.7% in that of table wines.

2. Industrial uses

These include the quantities used for the production of brandy with a registered designation of origin (5.65 million hl of wine), juices (3.26 million hl), vermouths (2.18 million hl) and vinegar (1.22 million hl). Overall, these uses absorbed 12.31 million hl.

3. Community distillation

Since the harvest was small, obligatory distillation was not introduced for the second successive wine year. The total volume distilled (apart from 4.5 million hl of by-products of wine-making) was 2 million hl. This was a reduction of 4 million hl on the previous year, in which the harvest was also small, and of 19 million and 27 million hl on the 1993/94 and 1992/93 wines years respectively.

4. Imports and exports

Intra-Community trade involved around 30 million hl. Exports from EUR-15 to third countries during the 1995/96 wine year totalled 9.7 million hl, down 13% on the previous year. Of this, 2.15 million hl were exported with a refund.

The Community imported 7 million hl from third countries, 83% more than in 1994/95. The reduction in exports and the large increase in imports are explained by the low level of Community production.

III. Stocks

Stocks of table wine in the EUR-15 at the end of the wine year were up 4.5 million hl, or 11%, but stocks of quality wine psr were down slightly (-0.2 million hl). It is clear that, although production during the year would have been insufficient to cover all requirements, i.e. including the production of wine spirits, it was more than enough to cover other needs. This, and the worsening of the balance between imports and exports, led to an increase in stocks of table wine.

IV. Conclusions

For the second successive year, the harvest was small and insufficient to cover needs if one includes the volume of wine required to supply the market for potable alcohol. There has been a shift in demand to quality wines, with the ratio of human consumption of table wine to quality wine per falling from 2.1:1 in 1986/87, to 1.5:1 five years ago and to 1.3:1 in 1995/96.

QUALITY WINES PSR - RED, ROSE, WHITE

C727998/TENA

REF:

VINBIL51

DATE: 5/10/98

1000 HL

Page:

1

HEADINGS	BE	DK	DE	EL	ES	FR	IRL	IT	LUX	NL	AUS	PT	FI	SVE	UK	TOT EUR
TOTAL PRODUCTION			8122	284	9960	24982		10363	110		1471	3028				58320
GRAPE JUICE**																
WINEMAKING			8122	284	9960	24982		10363	110		1471	3028				58320
STOCKS BEG MARKETING YR.	273	84	11295	246	11738	29362	21	7929	186	286	1782	4772	19	111	368	68472
PRODUCTION			8628	210	9215	19777		5392	151		1247	1077			2	45699
MARKETING	273	84	2667	36	2523	9585	21	2537	35	286	535	3695	19	111	366	22773
AVAILABILITY AT BEGINNING																
MARKETING YEAR	273	84	19417	530	21698	54344	21	18292	296	286	3253	7800	19	111	368	126792
IMPORTS	1460	927	3306	40	181	927	100	97	64	1620	123	14	70	517	3012	
INTRA EUR	1460	927	3306	40	181	927	100	97	64	1620	123	14	70	517	3012	
EXTRA EUR																
TOTAL AVAILABILITY	1733	1011	22723	570	21879	55271	121	18389	360	1906	3376	7814	89	628	3380	126792
HOME USES	1356	911	10954	195	7251	16712	100	6266	156	1646	1809	2345	77	565	2946	53289
HUMAN CONSUMPTION:	1350	911	10954	185	6881	15286	100	6226	156	1630	1705	2220	77	565	2946	51192
PROCESSING:																
OF WHICH DISTILLATION						1373					104	100				1708
-SPIRITS						1373					104	100				1708
-REGL 822/87					191	928					104	100				1219
-OTHER						385										489
OF WHICH VINEGAR																
OF WHICH VERMOUTH																
LOSSES:	6			10	179	113		40		16		25				389
OF WHICH PRODUCTION				5	179	113		20				25				342
OF WHICH TRADE	6			5				20		16						47
EXPORTS	111	16	1870	180	3047	6737	4	4386	36	80	51	1735		1	62	
INTRA EUR	100	14	1288	140	2366	4937	4	2873	36	49	48	690			62	
EXTRA EUR	11	2	582	40	681	1800		1513		31	3	445		1		
STOCK END MARKETING YR.	266	84	9899	195	11581	31822	17	7737	168	180	1516	4334	12	62	372	*5258
PRODUCTION			7172	165	9115	21989		5294	138		1179	1151				68245
TRADE	266	84	2727	30	2466	9833	17	2443	30	180	337	3183	-12	62	372	46203
STOCK VARIATION	-7		-1396	-51	-157	2460	-4	-192	-18	-106	-266	-438	-7	-49	4	-227
DEGREE OF SELF-SUFFIC.	0,00	0,00	0,74	1,46	1,41	1,58	0,00	1,65	0,71	0,00	0,81	1,35	0,00	0,00	0,00	1,12
POPULATION	10.068.300	5.180.600	80.614.100	10.346.400	39.114.200	57.529.600	3.560.000	56.932.700	395.200	15.239.200	7.909.600	9.859.600	5.055.000	8.692.000	57.959.000	368.455.500
CONSUMPTION PER CAPITA	13,41	17,58	13,59	1,79	17,59	26,57	2,81	10,94	39,47	10,70	21,56	22,52	1,52	6,50	5,08	13,89
(Litres)																

* Calculate as the difference between total export and intra-Community import

** Including the preparation of concentrated must

5

BALANCE SHEET WINE

WINE YEAR 95-96

TABLE WINES - RED, ROSE, WHITE
DATE: 5/10/98

C727998/TENA
1000 HL

REF: VINBIL51
Page: 2

HEADINGS	BE	DK	DE	EL	ES	FR	IRL	IT	LUX	NL	AUS	PT	FI	SVE	UK	TOT EUR
TOTAL PRODUCTION	2		239	3568	10003	23212		42711	30		736	4227			13	84741
GRAPE JUICE**				400		400		400								800
WINEMAKING	2		239	3568	10003	22812		42311	30		736	4227			13	83941
STOCKS BEG. MARKETING YR.	106	112	4846	924	5698	11118	17	14615	42	63	918	2405	16	81	234	41195
PRODUCTION			440	853	3954	6691		9112	16		551	1276			30	22923
MARKETING	106	112	4406	71	1744	4427	17	5503	26	63	367	1129	16	81	204	18272
AVAILABILITY AT BEGINNING																
MARKETING YEAR	108	112	5085	4492	15701	33930	17	56926	72	63	1654	6632	16	81	247	125136
IMPORTS	540	326	5595	10	345	4703	72	195	58	583	105	684	96	297	2325	
INTRA EUR	540	326	5595	10	345	4703	72	195	58	583	105	684	96	297	2325	
EXTRA EUR																
TOTAL AVAILABILITY	648	438	10680	4502	16046	38633	89	57121	130	646	1759	7316	112	378	2572	125136
HOME USES	466	303	5450	3105	7126	21010	71	28626	57	509	887	3734	94	263	2162	73857
HUMAN CONSUMPTION:	457	303	5450	2795	5214	19166	71	25540	57	503	801	3464	94	263	2162	66340
PROCESSING:	6			260	1812	1794		2886			80	210				7048
OF WHICH DISTILLATION				160	946	1198		1116			80	160				3660
-SPIRITS				160	946	1198		916				160				3380
-REGL 822/87								200			80					280
-OTHER				50	353	302		450				50				1211
OF WHICH VINEGAR	6			50	513	294		1320								2177
OF WHICH VERMOUTH				50	100	50		200		6		60				469
LOSSES:	3			15	100	50		60				60				285
OF WHICH PRODUCTION	3			35				140		6						184
OF WHICH TRADE																
EXPORTS	76	23	545	470	2910	6232		10221	42	64	97	710			136	
INTRA EUR	72	21	481	460	1909	4702		8751	42	41	27	500			136	
EXTRA EUR	4	2	64	10	1001	1530		1470		23	70	210				*5592
STOCK END MARKETING YR.	106	112	4685	927	6010	11391	18	18274	31	73	781	2872	18	115	274	45687
PRODUCTION			382	866	4210	7277		12681	2		590	1446			33	27487
TRADE	106	112	4303	61	1800	4114	18	5593	29	73	191	1426	18	115	241	18200
STOCK VARIATION			-161	3	312	273	1	3659	-11	10	-137	467	2	34	40	4492
DEGREE OF SELF-SUFFIC.	0,00	0,00	0,04	1,21	1,62	1,15	0,00	1,53	0,53	0,00	0,84	1,18	0,00	0,00	0,01	1,19
POPULATION	10.068.300	5.180.600	10.614.100	10.346.400	39.114.200	57.529.600	3.560.000	56.932.700	395.200	15.239.200	7.909.600	9.859.600	5.055.000	8.692.000	57.959.000	368.455.500
CONSUMPTION PER CAPITA																
(Litres)	4,54	5,85	6,76	27,01	13,33	33,32	1,99	44,86	14,42	3,30	10,13	35,13	1,86	3,03	3,73	18,00

* Calculated as the difference between total export and intra-Community import
** Including the preparation of concentrated must

6

OTHER WINES: RED, ROSE, WHITE																
C727998/TENA											VINBIL51	3				
1000 HL											REF:	Page:				
DATE: 5/10/96																
HEADINGS	BE	DK	DE	EL	ES	FR	IRL	IT	LUX	NL	AUS	PT	FI	SVE	UK	TOT EUR
TOTAL PRODUCTION				23	2418	7416		3128	10		22					13017
GRAPE JUICE**					1505	856		100								2461
WINEMAKING				23	913	6560		3028	10		22					10556
STOCKS BEG. MARKETING YR.	39	4	193	45	307	56	13	198	64	80			16	62	368	1445
PRODUCTION			21	41	125			108	21							316
MARKETING	39	4	172	4	182	56	13	90	43	80			16	62	368	1129
AVAILABILITY AT BEGINNING																
MARKETING YEAR	39	4	193	68	1220	6616	13	3226	74	80	22		16	62	368	12001
IMPORTS	452	239	2458		1671	795	91		48	144	55		90	287	2124	
INTRA EUR	327		1028								45					
EXTRA EUR	125	239	1430		1671	795	91		48	144	10		90	287	2124	7054
TOTAL AVAILABILITY	491	243	2651	68	2891	7411	104	3226	122	224	77		106	349	2492	19055
HOME USES	388	237	2326	68	2385	7204	79	3112	7	39	51		90	287	2103	16376
HUMAN CONSUMPTION:	387	237	2324	63	2364	639	79	2927	7	37	38		90	287	2103	11582
PROCESSING:			2	5	15	6545		185			13					6765
OF WHICH DISTILLATION			2	5	15	6545		185			2					6754
-SPIRITS						5652										5652
-REGL 822/87			2	5	15	893		185								1100
-OTHER																2
OF WHICH VINEGAR																9
OF WHICH VERMOUTH																2
LOSSES:	1				6	20				2						29
OF WHICH PRODUCTION					6	20										26
OF WHICH TRADE	1				6	20				2						3
EXPORTS	65	2	149		233	98	4		37		26					30
INTRA EUR	60	1	98		206		3		37		22					30
EXTRA EUR	5	1	51		27	98	1				4					
STOCK END MARKETING YR.	38	4	176		273	109	21	114	78	185			16	62	359	1435
PRODUCTION			9		103			36	36							184
TRADE	38	4	167		170	109	21	78	42	185			16	62	359	1251
STOCK VARIATION	-1		-17	-45	-34	53	8	-84	14	105					-9	-10
DEGREE OF SELF-SUFFIC.	0,00	0,00	0,00	0,37	0,39	1,04	0,00	1,03	1,43	0,00	0,43	0,00	0,00	0,00	0,00	0,61
POPULATION	10.066.300	5.180.600	80.614.100	10.346.400	39.114.200	57.529.600	3.560.000	56.932.700	395.200	15.239.200	7.909.600	9.859.600	5.055.000	8.692.000	57.959.000	368.455.500
CONSUMPTION PER CAPITA (Litres)	3,84	4,57	2,88	0,61	6,04	1,11	2,22	5,14	1,77	0,24	0,48	0,00	1,78	3,30	3,63	3,14

TOTAL WINES - RED, ROSE, WHITE																
REF: C727998/TENA										VINJIL51		4				
DATE: 5/10/98										1000 HL		Page:				
HEADINGS	BE	DK	DE	EL	ES	FR	IRL	IT	LUX	NL	AUS	PT	FI	SVE	UK	TOT EUR
TOTAL PRODUCTION	2		8361	3875	22381	55610		56202	150		2229	7255			13	156078
GRAPE JUICE**					1505	1256		500								3261
WINEMAKING	2		8361	3875	20876	54354		55702	150		2229	7255			13	152817
STOCKS BEG. MARKETING YR.	418	200	16334	1215	17743	40536	51	22742	292	429	2700	7177	51	254	970	111112
PRODUCTION			9089	1104	13294	26468		14612	188		1798	2353			32	68938
MARKETING	418	200	7245	111	4449	14068	51	8130	104	429	902	4824	51	254	938	42174
AVAILABILITY AT BEGINNING																
MARKETING YEAR	420	200	24695	5090	38619	94890	51	78444	442	429	4929	14432	51	254	983	263929
IMPORTS	2452	1492	11359	50	2197	6425	263	292	170	2347	283	698	256	1101	7461	
INTRA EUR	2327	1253	9929	50	526	5630	172	292	122	2203	273	698	166	814	5337	
EXTRA EUR	125	239	1430		1671	795	91		48	144	10		90	287	2124	7054
TOTAL AVAILABILITY	2872	1692	36054	5140	40816	101315	314	78736	612	2776	5212	15130	307	1355	8444	270983
HOME USES	2210	1451	18730	3368	16762	44926	250	38004	220	2194	2741	6079	261	1115	7211	145522
HUMAN CONSUMPTION:	2194	1451	18728	3043	14459	35091	250	34693	220	2170	2544	5684	261	1115	7211	129114
PROCESSING:	6		2	265	2018	9652		3071			197	310				15521
OF WHICH DISTILLATION			2	165	1152	9056		1301			186	260				12122
-SPIRITS			2	165	1152	5652						260				5652
-REGL 822/87						3019		1101			186					5699
-OTHER						385		200								771
OF WHICH VINEGAR	6			50	353	302		450			9	50				1220
OF WHICH VERMOUTH				50	513	294		1320			2					2179
LOSSES:	10			60	285	183		240		24		85				887
OF WHICH PRODUCTION				20	285	183		80				85				653
OF WHICH TRADE	10			40				160		24						234
EXPORTS	252	41	2564	650	6190	13067	8	14607	115	144	174	1845		1	228	
INTRA EUR	232	36	1867	600	4481	9639	7	11624	115	90	97	1190			198	
EXTRA EUR	20	5	697	50	1709	3428	1	2983		54	77	655		1	30	*10094
STOCK END MARKETING YR.	410	200	14760	1122	17864	43322	56	26125	277	438	2297	7206	46	239	1005	115367
PRODUCTION			7563	1031	13428	29266		18011	176		1769	2597			33	73874
TRADE	410	200	7197	91	4436	14056	56	8114	101	438	528	4609	46	239	972	41493
STOCK VARIATION	-8		-1574	-93	121	2786	5	3383	-15	9	-403	29	-5	-15	35	4255
DEGREE OF SELF-SUFFIC.	0,00	0,00	0,45	1,21	1,34	1,3		1,51	0,68	0,00	0,81	1,25			0,00	1,09
POPULATION	10.068.300	5.180.600	80.614.100	10.346.400	39.114.200	57.529.600	3.560.000	56.932.700	395.200	15.239.200	7.909.600	9.859.600	5.055.000	8.692.000	57.959.000	368.455.500
CONSUMPTION PER CAPITA	21,79	28,01	23,23	29,41	36,97	61,00	7,02	60,94	55,67	14,24	32,16	57,65	5,16	12,83	12,44	35,04
(Litres)																

* Calculated as the difference between total export and intra-Community import
 ** including the preparation of concentrated must

ISSN 0254-1475

COM(98) 791 final

DOCUMENTS

EN

03 10 16 17

Catalogue number : CB-CO-98-791-EN-C

Office for Official Publications of the European Communities

L-2985 Luxembourg