

COMMISSION OF THE EUROPEAN COMMUNITIES

COM(87) 406 final

Brussels, 14 September 1987

COMMUNICATION FROM THE COMMISSION
TO THE COUNCIL
CONCERNING THE FINAL SUPPLY BALANCE FOR WINE
FOR THE 1985/86 WINE YEAR

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Under Article 31(3) of Council Regulation (EEC) No 822/87 of 16 March 1987 (1), the basic Regulation on wine, the Commission is required to provide the Council each year with a final statement of Community resources and consumption in the preceding wine year.

In fulfilment of the above requirement, this Communication contains the final supply balance for wine for the 1985/86 wine year. A comparison of the balances for 1985/86 and 1984/85 attached to this Communication leads to the following observations:

I. PRODUCTION

Total production of wine in the Community in 1985/86 (1985 harvest) was 142.7 million hectolitres compared with the record 168.2 million hl from the 1979 harvest and 171.9 million hl from the 1982 harvest. There was a decrease in Italy to 61.7 million hl as against 70.2 million hl in 1984 (- 12.1%), with quality wines psr totalling 8.1 million hl, and an increase in France to 70.1 million hl as against 63.4 million hl in 1984/85 (+ 10.6%), with quality wines psr (19.9 million hl) accounting for 28.4% of total production. Germany's production at 6.1 million hl was down (- 31,5%) as was production in Luxembourg with 107 000 hl (- 29.6% compared with 1984/85). In Greece, the decrease was slighter (4.8 million hl as against 5.0 million hl in 1984/85, i.e. - 4.0%) while the share of quality wines psr in this figure went up slighly to 7.6%.

Community production as a whole in 1985 was down by 4.9 million hl compared with 1984 (- 3.3%).

II. CONSUMPTION

Total internal Community consumption in 1985/86 came to 139.8 million hl compared with 152.4 million hl in 1984/85 (- 12.6 million hl or - 8.3%). These figures cover direct human consumption and quantities processed; details are given below.

(1) OJ No L 84, 27.3.1987, p. 1.

1. Direct human consumption

Direct human consumption totalled 107.6 million hl, down by 7 million hl (- 6.2%) on the previous wine year. These figures confirm that the trend continues to be downwards, affecting the two main producing countries (France and Italy), without this being offset by the increases in consumption in the other Member States.

In France, wine consumption per head/year still averaged some 97 l in 1976-80 but is now down to 80.4 l in 1985/86 after being 83.1 l in 1983/84. The trend is much more marked in Italy: 62.2 l per head/year in 1985/86 compared with 80.4 l in 1983/84, 71.3 l in 1984/85 and an average of 90 l in 1976-80. Taking the Community as a whole, per capita wine consumption fell by 2.7 l in 1985/86 (- 6.4%). The trend over the last 15 years is apparent from the selected figures set out below.

	<u>1971/1972</u>	<u>1975/1976</u>	<u>1979/1980</u>	<u>1985/1986</u>
Italy	55 305	54 387	49 305	35 567
France	55 211	54 318	51 584	44 448
combined	<u>110 516</u>	<u>108 705</u>	<u>100 889</u>	<u>80 015</u>
Total EUR 10	131 331	134 448	129 458	107 607

2. Quantities processed

Quantities processed in 1985/86, which are made up of quantities intended for making into wine spirits with a designation of origin (i.e. wine produced specially for distillation), wine distilled with Community aid and quantities intended for the manufacture of other products such as vinegar, accounted for 31.6 million hl as against 37.1 million hl in 1984/85 (- 5.5 million hl or - 14.8%).

The quantities of wine distilled with Community aid, which reached 29.9 million hl in 1984/85, came to 23.8 million hl in 1985/86. France and Italy alone accounted for the distillation of some 23.2 million hl, with Greece distilling 0.6 million hl.

Disregarding distillation schemes financed from the Guarantee Section of the European Agricultural Guidance and Guarantee Fund (EAGGF), total internal consumption for 1985/86 corresponds to a self-sufficiency rate of 123.0%. This degree of self-sufficiency comes down to 102.1% if intervention distillation is taken into account.

III. END-OF-YEAR STOCKS

Community wine stocks at 31 August 1986 amounted to 97 million hl as against 99 million hl at 31 August 1985 (- 2 million hl or - 2%).

IV. EXTERNAL TRADE

In the wine year under review, the Community imported 4.6 million hl from non-member countries compared with 5.0 million hl in 1984/85 (- 8.1%). There was a downturn in exports from 11.0 million hl in 1984/85 to 9.4 million hl in 1985/86 (- 15.0%).

The external trade balance therefore remains in surplus, by 4.8 million hl against 6.0 million hl in 1984/85.

WINE SUPPLY BALANCE - 1984/85 WINE YEAR

('000 hl)

	BELGIUM	DENMARK	GERMANY	GREECE	FRANCE	IRELAND	ITALY	LUXEMBOURG	NETHERLANDS	UK	EUR 10
Total production	2		8 887	5 025	64 360		70 900	152		13	149 339
- used for grape juice			5		942		730				1 677
- used for wine-making	2		8 882	5 025	63 418		70 170	152		13	147 662
Start-of-year stocks	389		17 107	2 582	47 223	27	40 590	256	444	1 148	109 766
- held by growers	2		9 851	2 466	33 681		24 110	188		13	70 311
- held by the trade	387		7 256	116	13 542	27	16 480	68	444	1 135	39 455
Availabilities at beginning of wine year	391		25 989	7 607	110 641	27	110 760	408	444	1 161	257 428
Imports (1)	2 155	1 050	9 812	6	7 535	123	509	136	2 282	5 686	
- intra-EUR	1 769	853	7 872	6	6 924	100	419	129	1 745	4 471	
- extra-EUR	386	197	1 940		611	23	90	7	537	1 215	5 006
Total availabilities	2 546	1 050	35 801	7 613	118 176	150	111 269	544	2 726	6 847	262 434
Total domestic uses	1 971	1 024	15 998	4 334	62 307	119	58 637	209	2 164	5 630	152 393
- direct human consumption	1 958	1 024	15 608	3 144	44 207	119	40 622	209	2 143	5 630	114 664
- processing	1		390	1 120	17 800		17 750				37 061
of which distilling			292	1 080	17 577		17 300				36 249
- wine spirits			50	1 080	5 688		17 149				5 688
- Regulation 337/79			242		11 650		151				29 929
- others			98	40	239		450		21		632
of which vinegar-making	1			70	223		265				812
- losses	12				300						668
of which production				35	200		80				315
of which trade losses				35	100		185		21		353
Exports (1)	168	26	3 140	1 094	11 523	2	19 082	85	61	152	
- intra-EUR	165	16	1 993	661	7 817	1	14 040	85	59	52	
- extra-EUR	3	10	1 147	433	3 706	1	5 042		2	100	11 045
End-of-year stocks	407		16 663	2 185	44 346	29	33 550	250	501	1 065	98 996
- held by growers	2		9 616	2 011	30 409		23 378	187		8	65 611
- held by the trade	405		7 047	174	13 937	29	10 172	63	501	1 057	33 385
Changes in stocks	18		- 444	- 397	- 2 877	2	- 7 040	- 6	57	- 83	- 10 770
Degree of self-sufficiency (2)	0,00	0,00	0,56	1,54	1,26	0,00	1,69	0,73	0,00	0,00	1,21
Population	9 855 000	5 112 000	61 175 000	9 896 000	54 947 000	3 535 000	57 005 000	366 000	14 424 000	56 488 000	272 803 000
Per capita consumption (litres)	19,87	20,03	25,51	31,77	80,42	3,37	71,26	57,10	14,86	9,97	42,02

Source: EUROSTAT

(1) With the exception of France, the external trade figures take account of a reduction to 75% of the real volumen of vermouths and aromatized wines
(2) Excluding quantities distilled under intervention measures

WINE SUPPLY BALANCE - 1985/86 WINE YEAR

	BELGIUM	DENMARK	GERMANY	GRECE	FRANCE	IRELAND	ITALY	LUXEMBOURG	NETHERLANDS	UK	EUR 10
Total production	2		6 102	4 782	71 297		62 340	107		6	144 636
- used for grape juice			5		1 242		650				1 897
- used for wine-making	2		6 097	4 782	70 055		61 690	107		6	142 739
Star-of-year stocks	407		16 663	2 185	44 346	29	33 550	250	501	1 065	98 996
- held by growers	2		9 616	2 011	30 409		23 378	187		8	65 611
- held by the trade	405		7 047	174	13 937	29	10 172	63	501	1 057	33 385
Availabilities at beginning of wine year	409		22 760	6 967	114 401	29	95 240	357	501	1 071	241 735
Imports (1)	2 045	1 020	8 667	7	5 047	118	573	139	2 133	5 406	
- intra-EUR	1 712	815	7 228	6	4 412	105	493	129	1 602	4 054	
- extra-EUR	333	205	1 439	1	635	13	80	10	531	1 352	4 599
Total availabilities	2 454	1 020	31 427	6 974	119 448	147	95 813	496	2 634	6 477	246 334
Total domestic uses	1 868	991	14 663	3 685	62 376	115	48 655	213	2 050	5 217	139 833
- direct human consumption	1 855	991	14 229	2 941	44 448	115	35 567	213	2 031	5 217	107 607
- processing	1		434	675	17 626		12 828				31 564
- of which distilling			340	625	17 381		12 378				30 724
- wine spirits				625	6 020		12 228				6 020
- Regulation 337/79					10 970						23 823
- others	1		340	50	391		150				881
- of which vinegar-making	12		94	69	245		450		19		840
- losses					302		260				662
- of which production losses	12			32	181		80				293
- of which trade losses				37	121		180		19		369
Exports (1)	177	29	2 589	980	12 374	3	13 536	73	46	141	
- intra-EUR	174	18	1 762	691	8 610	3	9 717	73	44	45	
- extra-EUR	3	11	827	289	3 764		3 819		2	96	9 392
End-of-year stocks	409		14 175	2 309	44 698	29	33 622	210	538	1 119	97 109
- held by growers	2		7 654	2 156	31 595		23 916	146		7	65 476
- held by the trade	407		6 521	153	13 103	29	9 706	64	538	1 112	31 633
Changes in stocks	2		- 2 488	124	352		72	- 40	37	54	- 1 887
Degree of self-sufficiency (2)	0,00	0,00	0,42	1,56	1,36	0,00	1,69	0,50	0,00	0,00	1,23
Population	9 858 900	5 116 300	61 020 000	9 950 000	55 282 400	3 537 900	57 202 000	367 200	14 529 400	56 743 400	273 607 500
Per capita consumption (litres)	18,82	19,37	23,32	29,56	80,40	3,25	62,18	58,01	13,98	9,19	39,33

Source: EUROSTAT

(1) With the exception of France, the external trade figures take account of a reduction to 75% of the real volume of vermouths and aromatized wines
 (2) Excluding quantities distilled under intervention measures

Wine stocks ('000 hl) - 1984/85 wine year

EUR 10

	Stocks at beginning of year (1 9 1984)			Stocks at end of year (31 8 1985)			Changes in stocks		
	Total	Held by growers	Held by trade	Total	Held by growers	Held by the trade	Total	Held by growers	Held by the trade
a) Total wine (b + c + d)	109 766	70 311	39 455	98 996	65 611	33 385	- 10 770	- 4 700	- 6 070
- red and rosé wine	62 652	42 766	19 886	56 612	40 271	16 341	- 6 040	- 2 495	- 3 545
- white wine	47 114	27 545	19 569	42 384	25 340	17 044	- 4 730	- 2 205	- 2 525
b) Quality wine psr	47 773	32 283	15 490	43 345	29 892	13 453	- 4 428	- 2 391	- 2 037
- red and rosé wine	23 234	16 528	6 706	20 605	14 788	5 817	- 2 629	- 1 740	- 889
- white wine	24 539	15 755	8 784	22 740	15 104	7 636	- 1 799	- 651	- 1 148
c) Table wine	57 415	37 715	19 700	51 097	35 337	15 760	- 6 318	- 2 378	- 3 940
- red and rosé wine	38 436	26 188	12 248	34 896	25 355	9 541	- 3 540	- 833	- 2 707
- white wine	18 979	11 527	7 452	16 201	9 982	6 219	- 2 778	- 1 545	- 1 233
d) Other wine	4 578	313	4 265	4 554	382	4 172	- 24	+ 69	- 93
- red and rosé wine	982	50	932	1 111	128	983	+ 129	+ 78	+ 51
- white wine	3 596	263	3 333	3 443	254	3 189	- 153	- 9	- 144

Source: EUROSTAT

Wine stocks ('000 hl) - 1985/86 wine year

EUR 10

	Stocks at beginning of year (1 9 1985)			Stocks at end of year (31 8 1986)			Changes in stocks		
	Total	Held by growers	Held by the trade	Total	Held by growers	Held by the trade	Total	Held by growers	Held by the trade
a) Total wine (b + c + d)	98 996	65 611	33 385	97 109	65 476	31 633	- 1 887	- 135	- 1 752
- red and rosé wine	56 612	40 271	16 341	56 897	41 500	15 397	+ 285	+ 1 229	- 944
- white wine	42 384	25 340	17 044	40 212	23 976	16 236	- 2 172	- 1 364	- 808
b) Quality wine psr	43 345	29 892	13 453	44 184	30 148	14 036	+ 839	+ 256	+ 583
- red and rosé wine	20 605	14 788	5 817	22 448	16 191	6 257	+ 1 843	+ 1 403	+ 440
- white wine	22 740	15 104	7 636	21 736	13 957	7 779	- 1 004	- 1 147	+ 143
c) Table wine	51 097	35 337	15 760	48 787	35 077	13 710	- 2 310	- 240	- 2 050
- red and rosé wine	34 896	25 355	9 541	33 507	25 241	8 266	- 1 389	- 114	- 1 275
- white wine	16 201	9 982	6 219	15 280	9 836	5 444	- 921	- 146	- 775
d) Other wine	4 554	382	4 172	4 138	251	3 887	- 416	- 131	- 285
- red and rosé wine	1 111	128	983	942	68	874	- 169	- 60	- 109
- white wine	3 443	254	3 189	3 196	183	3 013	- 247	- 71	- 176

Production of table wine, quality wine psr and other wine in the Community
by colour and Member State

1984/85 wine year

Member State	Total wine			Quality wine psr			Table wine			Other wine		
	Total	rouges et rosés	blancs	Total	rouges et rosés	blancs	Total	rouges et rosés	blancs	Total	rouges et rosés	blancs
FR of Germany	8 882	1 129	7 753	7 731	1 054	6 677	1 151	75	1 076	-	-	-
France	63 418	44 888	18 530	15 715	9 877	5 838	39 572	35 011	4 561	8 131	-	8 131
Italy	70 170	42 453	27 717	6 885	3 773	3 112	59 389	37 597	21 792	3 896	1 083	2 813
Belgium	2	1	1	-	-	-	2	1	1	-	-	-
Luxembourg	152	-	152	101	-	101	51	-	51	-	-	-
United Kingdom	13	-	13	-	-	-	13	-	13	-	-	-
Greece	5 025	1 760	3 265	360	192	168	4 588	1 507	3 081	77	61	16
EUR 10	147 662	90 231	57 431	30 792	14 896	15 896	104 768	74 191	30 577	12 104	1 144	10 960

Source: EUROSTAT

Production of table wine, quality wine psr and other wine in the Community
by colour and Member State

Campagne 1985/86

Member State	Total wine			Quality wine psr			Table wine			Other wine		
	Total	rouges et rosés	blancs	Total	rouges et rosés	blancs	Total	rouges et rosés	blancs	Total	rouges et rosés	blancs
FR of Germany	6 097	595	5 502	6 081	593	5 488	16	2	14	-	-	-
France	70 055	48 093	21 962	19 860	13 480	6 380	39 472	34 613	4 859	10 723	-	10 723
Italy	61 690	39 024	22 666	8 082	4 569	3 513	48 631	30 797	17 834	4 977	3 658	1 319
Belgium	2	1	1	-	-	-	2	1	1	-	-	-
Luxembourg	107	-	107	86	-	86	21	-	21	-	-	-
United Kingdom	6	-	6	-	-	-	6	-	6	-	-	-
Greece	4 782	1 706	3 076	363	198	165	4 376	1 476	2 900	43	32	11
EUR 10	142 739	89 419	53 320	34 472	18 840	15 632	92 524	66 889	25 635	15 743	3 690	12 053

Source : EUROSTAT