

# COMMISSION OF THE EUROPEAN COMMUNITIES

COM(93) 720 final

Brussels, 12 January 1994

## COMMUNICATION FROM THE COMMISSION TO THE COUNCIL

ON THE DEFINITIVE SUPPLY BALANCE FOR WINE  
FOR THE 1991/92 WINE YEAR

COMMUNICATION FROM THE COMMISSION TO THE COUNCIL  
ON THE DEFINITIVE SUPPLY BALANCE FOR WINE  
FOR THE 1991/92 WINE YEAR.

I. Total production

	1991/92			1990/91		
	Table wine	Quality wine psr	Other	Table wine	Quality wine psr	Other
D	413	10 291	-	197	9 313	-
GR	3 603	355	64	3 126	328	72
E	18 922	10 508	3 894	26 637	10 891	4 703
F	22 407	16 594	3 688	29 290	23 615	12 625
I	48 313	9 207	2 268	43 450	9 652	1 764
P	7 521	2 400	100	8 501	2 850	-
EUR 12	101 179	49 355	10 014	111 238	56 755	19 189
Total EUR 12	160 548			187 182		

The 1991/92 wine year was characterized by a "small harvest" as a result of the very bad weather conditions in France and some regions in Spain. The fall in production in France was considerable and affected all types of wine (in total 35% down on the previous year), whereas in Spain the reduction mainly affected table wines (approximately 8 million hl less). By contrast, table wine production in Italy was 5 million up on the 1990/91 wine year.

II. Utilization

With a view to considering the supply balance to follow, we will comment on figures for the Community of Eleven since the market in Portugal is managed according to specific arrangements, on the basis of transitional measures adopted from the beginning of the second stage of accession on 1 January 1991.

Total utilization for EUR 11 for the 1990/91 wine year, comprising human consumption, industrial utilization (including grape juice), Community distillation and the net balance of exports to non-member countries, amounts to 162 649 000 hl, down on the previous wine year on account of the fall in consumption and distillation measures covering a smaller quantity of wine to be distilled.

1. Human consumption

With an EUR 11 level of 122 million hl in 1991/92, human consumption shows a fall of 4 million hl over the previous year (i.e. -3%). The greatest reductions were in Germany and France.

2. Industrial utilization

This comprises quantities for processing into on the one hand wine spirits, i.e. 3.8 million hl of other wine, and on the other hand juice, vermouth and vinegar, i.e. 4.3, 1.2 and 2 million hl respectively, mainly of table wine.

Overall, industrial utilization has allowed almost 11.3 million hl to be disposed of, which represents a fall of 5 million hl ascribable to the very poor harvest of the grape traditionally intended for making wine spirits.

3. Community distillation

In the Community of Eleven this involved 21.6 million hl, of which 15.6 million were accounted for by compulsory distillation, (including 8.15 million for preventive distillation) and 6 million by support distillation.

4. Import and export trade

Most trade in wine is intra-Community; EUR 11 exports to non-member countries account for 8.7 million hl, more or less the same as the previous wine year.

The figure for imports from non-member countries remains unchanged at 3.3 million hl, which gives a net export balance of 5.4 million hl, and confirms the stability of the level of trade.

III. Stocks

End-of-year table wine stocks in the Community of Eleven show a fall of approximately 3 million hl, which seems to indicate that intervention measures are matched to needs and have achieved the desired result.

V. Conclusions

For a number of years the conditions for activities linked to wine growing have been unfavourable.

Of the large number of problems affecting the wine-growing sector, two in particular have a negative effect on striking a balance between availabilities and uses:

- the continuing fall in human consumption
- the increasing competition at world level, with new countries coming onto the market at very competitive prices as a result of considerably lower production costs.

The negative consequences of this situation have been felt less in the 1991/92 wine year as a result of the considerably lower than average production.

Nevertheless the difficulties persist: stocks represent 16.5 months of normal use of quality wines psr and almost seven months of table wines. It is clear that the availability of such quantities will have an effect on the following wine year.

BALANCE SHEET WINE  
 WINE YEAR 1991/1992

QUALITY WINES PSR RED ROSE WHITE

HEADINGS	BELG	DANM	DEUT	ELLA	ESP	FRAN	IREL	ITAL	LUXB	NDRL	U.K.	EUR11	PORT	EUR12
TOTAL PRODUCTION			10291	355	10508	16594		9207	61			47016	2400	49416
GRAPE JUICE														
WINE-MAKING			10291	355	10508	16594		9207	61			47016	2400	49416
STOCKS AT BEGINNING														
OF MARKETING YEAR	234	132	11865	404	17894	31789	17	8765	164	171	422	71857	1713	73970
PRODUCTION			8693	369	15226	21850		5897	134			52169	862	53031
TRADE	234	132	3172	35	2668	9939	17	2868	30	171	422	19688	851	20539
AVAILABILITIES AT														
BEG. MARKETING YEAR	234	132	22156	759	28402	48383	17	17972	225	171	422	118873	4113	122986
IMPORTS	1442	587	3282	10	101	713	80	148	62	1096	2734		29	
INTRA EUR.	1442	587	3282	10	101	713	80	148	62	1096	2734		29	
EXTRA EUR.														
TOTAL AVAILABILITY	1576	719	25438	769	28503	49096	97	18120	287	1267	3156	118873	4142	122986
HOME USES	1378	590	11239	455	7975	14937	70	5814	168	1068	2370	46264	1688	47952
HUMAN CONSUMPTION	1372	590	11239	444	7240	13427	70	5774	168	1056	2570	43950	1600	45550
PROCESSING					525	1472						1997		1997
OF WHICH DISTIL.					525	1472						1997		1997
SPIRITS														
REGL. 922/87					525	800						1325		1325
OTHER						672						672		672
OF WHICH VINEGAR												153		153
OF WHICH VERMOUTH														
LOSSES	6			11	210	38		40		12		317	88	405
OF WHICH PROD.				4		38		20				62	44	106
OF WHICH TRADE	6			7				20		12		45	44	89
EXPORTS	66	8	2199	39	3812	6333		3734	36	26	30		1209	
INTRA EUR.	66	5	1592	35	2921	4494		2343	36	24	17		605	
EXTRA EUR.		3	607	4	891	1839		1391		2	13		604	7208
STOCKS END MARK. YEAR:	232	121	12000	275	16716	27826	27	8572	83	173	556	66581	1245	67826
PRODUCTION			9263	247		18324		6058	62			33954	500	34454
TRADE	232	121	2737	28		9502	27	2514	21	173		15355	745	16100
STOCK VARIATION	2	-11	135	-129	-1178	-3963	10	-193	-81	2	134	-5276	-468	-5744
DEGREE OF SELF-SUFF.	0,00	0,00	0,92	0,78	1,41	1,17	0,00	1,58	0,36	0,00	0,00	1,05	1,42	1,06
POPULATION	9931000	5151000	79423000	10076000	37643400	56311000	3528000	57682000	374400	14938000	57373000	332430800	9816000	342246800
CONSUMPTION PER														
CAPITA (LITRES)	13,82	11,45	14,15	4,41	19,23	23,84	1,98	10,01	44,87	7,07	4,48	13,22	16,30	13,31

CALCULATED AS THE DIFFERENCE BETWEEN TOTAL EXPORT AND INTRA-COMMUNITY IMPORT

HEADINGS	BELG	DANM	DEUT	ELLA	ESP	FRAN	IREL	ITAL	LUXB	NDEL	U.K.	EUR11	PORT	EUR12
TOTAL PRODUCTION	1	413	3603	18922	22407	48313	10	15	93684	7521	101205			
GRAPE JUICE	5	1	1251	450	47863	10	15	91977	7521	99498				
WINE-MAKING	1	408	3602	18922	21156	47863	10	15	91977	7521	99498			
STOCKS AT BEGINNING														
OF MARKETING YEAR	137	107	3789	1300	6750	15370	13	19582	50	64	383	47545	5500	53045
PRODUCTION	2	288	1211	4605	10831	13444	14	37	30432	1600	32032			
TRADE	135	107	3501	89	2145	4539	13	6138	36	64	346	17113	3900	21013
AVAILABILITIES AT														
BEG. MARKETING YEAR	138	107	4197	4902	25672	36526	13	67445	60	64	398	139522	13021	152543
IMPORTS	609	478	3230	59	22	5960	45	610	55	557	2458			
INTRA EUR.	609	478	3230	59	22	5960	45	610	55	557	2458			
EXTRA EUR.														
TOTAL AVAILABILITY	747	585	7427	4961	25694	42486	58	80955	115	621	2856	139522	13021	152543
HOME USES	610	465	3215	2352	16868	24933	44	44189	53	530	2540	95799	6385	102184
HUMAN CONSUMPTION	600	465	3215	2137	8465	22792	44	28942	53	522	2540	69775	3935	73710
PROCESSING	7		1911	171	8214	1911		15037				25340	2362	27702
OF WHICH DISTILL.														
SPIRITS														
REGL. 822/87														
OTHER														
OF WHICH VINESAR	1													
OF WHICH VERMOUTH	6													
LOSSES	3													
OF WHICH PROD.														
OF WHICH TRADE	3													
EXPORTS	31	20	512	567	2263	5070	2	8374	18	11	29		1100	
INTRA EUR.	31	17	426	499	931	3934	1	7094	18	10	23		700	
EXTRA EUR.														
STOCKS END MARK. YEAR	106	100	3700	2042	6563	12483	12	15492	44	80	287	40909	5536	46445
PRODUCTION	1													
TRADE	105	100	3500	168	4386	10	80	13343	34	20716	2062	27778	3474	16817
STOCK VARIATION	-31	-7	-89	742	-187	-2887	-1	-4090	-6	16	-96	-6636	36	-6600
DEGREE OF SELF-SUFF.	0,00	0,00	0,13	1,60	1,98	0,90	0,00	1,55	0,19	0,00	0,01	1,25	1,18	1,24
POPULATION	9931000	5151000	79423000	10076000	37643400	56311000	3528000	57682000	374400	14938000	57373000	332430800	9816000	342246800
CONSUMPTION PER														
CAPITA (LITRES)	6,04	9,03	4,05	21,21	22,49	40,48	1,25	50,18	14,16	3,49	4,43	20,99	40,09	21,54

CALCULATED AS THE DIFFERENCE BETWEEN TOTAL EXPORT AND INTRA-COMMUNITY IMPORT

B A L A N C E S H E E T W I N E										OTHER WINES RED ROSE WHITES			1000 HL	REF. : VINBIL46	
WINE YEAR 1991/1992										EUR11	U.K.	EUR11	PORT	DATE : 30/11/93	
HEADINGS	BELG	DANM	DEUT	ELLA	ESP	FRAN	IREL	ITAL	LUXB	NDRL	U.K.	EUR11	PORT	EUR12	PAGE : 3
TOTAL PRODUCTION				64	3994	3688		2268	15			9929	100	10029	
- GRAPE JUICE					2528			100				2628		2628	
- WINE-MAKING				64	1366	3688		2166	15			7301	108	7401	
STOCKS AT BEGINNING															
OF MARKETING YEAR	7	6	772		322	258	4	141	44	130	143	1827		1827	
- PRODUCTIN					322			67	11			400		400	
- TRADE	7	6	772			258	4	74	33	130	143	1427		1427	
AVAILABILITIES AT															
BEG. MARKETING YEAR	7	6	772	64	1688	3946	4	2309	59	130	143	9128	100	9228	
IMPORTS	141	104	3902	14	6	684	23	38	43	576	973				
- INTRA EUR.	82		2510	11	3	57	15	27	43	433					
- EXTRA EUR.	59	104	1392	3	3	627	8	11		143	973	3323		3324	
TOTAL AVAILABILITY	148	110	4674	78	1694	4630	27	2347	102	706	1116	12451	101	12552	
HOME USES	121	101	3863	78	1253	4528	23	1926	6	539	891	13329	101	13430	
- HUMAN CONSUMPTION	120	101	3836	14	1129	684	23	856	6	533	891	8193	101	8294	
- PROCESSING			27	64	114	3774		1070				5049		5049	
OF WHICH DISTIL.			27	64	114	3774		1070				5049		5049	
- SPIRITS						3771						3771		3771	
- REGL. 822/87			2	64	114			1070				1250		1250	
- OTHER			25		3							28		28	
OF WHICH VINEGAR															
OF WHICH VERMOUTH															
LOSSES	1				10	70				6		87		87	
OF WHICH PROD.						70						70		70	
OF WHICH TRADE	1									6		7		7	
EXPORTS	4	4	80		73	54		321	39	9					
- INTRA EUR.	4	3	69		34	47		308	39	9					
- EXTRA EUR.	1	1	11		39	7		13							
STOCKS END MARK. YEAR:	23	5	731		368	48	4	100	57	156	285	1719		1719	
- PRODUCTION								38	2			40		40	
- TRADE	23	5	731			48	4	62	55	156		1086		1086	
STOCK VARIATION	16	-1	-41		46	-210		-41	13	28	82	-108		-108	
DEGREE OF SELF-SUFF.	0,00	0,00	0,00	4,57	1,20	0,61	0,00	2,53	2,50	0,00	0,60	0,60	0,99	0,61	
POPULATION	9931000	5151000	79423000	10076000	37643400	56311000	3528000	57662000	374400	14938000	57373000	332430800	9816000	34246800	
CONSUMPTION PER															
CAPITA (LITRES)	1,21	1,96	4,83	0,14	3,00	1,21	0,65	1,48	1,60	3,57	1,55	2,46	1,03	2,42	

CALCULATED AS THE DIFFERENCE BETWEEN TOTAL EXPORT AND INTRA-COMMUNITY IMPORT

B A L A N C E S H E E T W I N E										TOTAL WINES RED ROSE WHITE									
WINE YEAR 1991/1992																			
HEADINGS	BELG	DANN	DEUT	ELLA	ESP	FRAN	IREL	ITAL	LUXB	NDRL	U.K.	EUR11	PORT	EUR12	REF. :VINBIL46				
															1000 HL				
															DATE :30/11/93				
															PAGE : 4				
TOTAL PRODUCTION	1	10704	4022	33324	42689	59788	86	15	150629	10021	160650								
GRAPE JUICE	5	1	2528	1251	550	4335													
WINE-MAKING	1	10699	4021	30796	41438	59238	66	15	146294	10021	156315								
STOCKS AT BEGINNING																			
OF MARKETING YEAR	378	245	16426	1704	24966	47417	34	28488	258	365	948	121229	7213	128442					
PRODUCTION	2	8981	1580	20153	32681	19408	159	37	83001	2462	85463								
TRADE	376	245	7445	124	4813	14736	34	9080	99	365	911	38228	4751	42979					
AVAILABILITIES AT																			
BEG. MARKETING YEAR	379	245	27125	5725	55762	88855	34	87726	344	365	963	267523	17234	284757					
IMPORTS	2192	1169	10414	83	129	7357	148	796	160	2229	6165		30						
INTRA EUR.	2133	1065	9022	80	126	6730	140	785	160	2086	5192		29						
EXTRA EUR.	59	104	1392	3	3	627	8	11		143	973		1	3324					
TOTAL AVAILABILITY	2571	1414	37539	5808	55891	96212	182	89522	504	2594	7128	270846	17564	288081					
HOME USES	2109	1156	18317	2885	26096	44398	137	51929	227	2137	6001	155392	8174	163566					
HUMAN CONSUMPTION	2092	1156	18290	2595	16934	36903	137	35572	227	2111	6001	121918	5636	127554					
PROCESSING	7	27	235	8853	7157	16107		16107		32386	2362	34748							
OF WHICH DISTIL.		27	160	7951	8549	14507		14507		29194	2282	31476							
SPIRITS																			
REGL. 822/87		2	160	7951	2103	14307		14307		24523		24523		24523					
OTHER		25			675	200		200		900		900		2282					
OF WHICH VINEGAR	1	40	482	268	400	400		400		1191		1191		80					
OF WHICH VERMOUTH	6	35	420	340	1200	2001		2001		2001		2001		2001					
LOSSES	10	55	409	338	250	26		26		1088		1088		176					
OF WHICH PROD.		23		338		80		80		441		441		88					
OF WHICH TRADE	10		32			170		170		238		238		88					
EXPORTS	101	32	2791	606	6148	11457	2	12429	93	46	59		2309						
INTRA EUR.	101	25	2087	534	3886	8475	1	9745	93	43	40		1305						
EXTRA EUR.		7	704	72	2262	2982	1	2684	3	19	*	6245	1004	8525					
STOCKS END MAR. YEAR	361	226	16431	2317	23647	40357	43	24164	184	411	1068	109209	6781	115990					
PRODUCTION	1	9463	2121	28421	28421	16606	98	16606	98			54710	2562	57272					
TRADE	360	226	6968	196	13936	13936	43	7558	86	411		29784	4219	34003					
STOCK VARIATION	-17	-19	5	613	-1319	-7060	9	-4324	-74	46	120	-12020	-432	-12452					
DEGREE OF SELF-SUFF.	0,00	0,00	0,58	1,48	1,70	0,98	0,00	1,57	0,38	0,00	0,00	1,12	1,23	1,12					
POPULATION	9931000	5151000	79423000	10076000	37643400	56311000	3528000	57622000	374400	14938000	57373000	332430800	9816000	342246800					
CONSUMPTION PER																			
CAPITA (LITRES)	21,07	22,44	23,03	25,75	44,72	65,53	3,88	61,67	60,63	14,13	10,46	36,67	57,42	37,27					

CALCULATED AS THE DIFFERENCE BETWEEN TOTAL EXPORT AND INTRA-COMMUNITY IMPORT

ISSN 0254-1475

COM(93) 720 final

# DOCUMENTS

**EN**

**03**

---

Catalogue number : CB-CO-93-771-EN-C

ISBN 92-77-63834-6

---

Office for Official Publications of the European Communities  
L-2985 Luxembourg