



COMMISSION III - « ECONOMY AND LAW »

## EXPERT GROUP “STATISTICS AND SITUATION”

Proceedings report of 6<sup>th</sup> session

Date: 2/4/2024

Place: Dijon (Dijon Metropole), KUDO videoconference



## SUMMARY SHEET OF THE WORK OF THE SUB-COMMISSIONS AND EXPERT GROUPS

Group of experts: « STATISTICS AND SITUATION»

Date: 2/04/2024

Number of experts present: 13 (Dijon), 22 (Kudo platform)

Number of countries, observers: 13 countries, 1 observer

Number of people invited: 1

### I/ Resolutions

Document	Step	Subject	Follow-up (step of the procedure)
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### II/ Questions from the Strategic Plan

Ref SP	Theme and treatment	Follow up
II A 1, II B 4, III A 3, VI B 3	Presentation of national situation reports by Member States, with a focus on area under vines as well as production, stocks, consumption, and international trade of wine, table grapes and dried grapes.	Continue this action also in the WP 2025 to keep monitoring the evolution of the vine and wine sector in the OIV Member States.
II B 1, II B 2, II B 3, V A 4, V B 3, VI A 7, VI B 2, VI C 4	Collection, aggregation and analysis of information on metadata and data collection methods in OIV Member States.	Keep this action for the WP 2025. The electronic working group (eWG) is re-established to simplify the draft report. It has been decided to shorten the study, divide it into several chapters and add an abstract to each section to ease the fruition and interpretation of results. The new draft will be then shared with the group of experts for their formal validation. The final report, once validated, will be published in 2025 as a document of collective expertise. In addition, in the framework of this collaborative work with the FAO, the preliminary results of the project on metadata and data collection methods will be shared with the Statistics Unit of the FAO. Alexandre Mondoux (CHE) has been confirmed as coordinator of the eWG.



III C 3	OIV-UN Tourism project on wine tourism measurement	S. Carvao (UN Tourism) made a presentation on the progress of the project on wine tourism measurement. This work has been conducted by an OIV-UN Tourism joint working group, whose mandate is to develop a scoping paper that includes a set of recommendations on how to measure wine tourism consistently and comparably at the international level. The publication of this report is expected in 2024 and will be followed by the launch of pilot projects at the country level in 2025.
II A 1, II B 1, III B 3, III A 3, VI B 3, VI C 1, VI C 4	OIV thematic focus.	<p>The 2022-2023 OIV Thematic Focus study on the evolution of world wine production and consumption by colour, published in December 2023, was presented to the group. The preliminary findings from the 2023/2024 thematic focus on re-exports in the international trade of wine have been presented. This report is expected to be published in 2024 as a joint publication OIV-OEMV.</p> <p>As for the new OIV Thematic Focus 2024-2025, the group has accepted the proposal of the OIV Director General and will work on the evolution of the vine and wine sector over the last 100 years (1924-2024). A questionnaire will be sent to OIV Member States in April/May 2024.</p> <p>For the year 2025-2026, the group agrees on the necessity of updating the study on table and dried grapes that was realized with FAO in 2016. In making this update, data on grape juices will be integrated into the report. For this reason, the IFU could be also involved.</p>

**III/ Request for additional information or opinion (statistics, economy, legal, technical, health)**

Information	Source
Request	Recipient

**IV/ Presentations other than point II**

Author	Country	Subject	Follow up



V/ Items on the agenda for the next session (without prejudice to subjects which may be added later)

Author	Country	Subject	Follow up

VI/ Other items

Author	Country	Subject	Follow up
		<p><b>Working Plan</b>  Progress and evolution of Working Plan 2024  Topics in the new Working Plan 2024</p>	<p>It has been decided to keep all actions of the WP2024 related to the work of the STATCO group also for the WP2025. The new thematic focus will be introduced as a new action. The OIV will send a call for experts to form the eWGs to work on the identified topics for 2024.</p>
		Date and place of next session	April 2024, Dijon

Date

Name and signature of the author of the proposal

4/4/2024

Patrick AIGRAIN  
President of STATCO group  
[original signature]

Giorgio DELGROSSO  
Head of the OIV Statistics and Digital Transformation Department  
[original signature]

**AGENDA<sup>1</sup>****6<sup>th</sup> session****Tuesday 2 April 2024 – 9.00 a.m. - 6.30 p.m. (UTC+2, Paris time)****Place: Dijon Métropole (S10), 40 Avenue du Drapeau - 21000 Dijon****KUDO videoconference**

No.	Topic	Working paper	WP Action	Time available
1.	<b>Adoption of the agenda</b>	CIII-STATCO 2024-04 OJ		9.00 a.m. - 9.05 a.m.
2.	<b>Approval of the summary of conclusions for the last Expert Group session</b>	CIII-STATCO 2023-03 CR		9.05 a.m. - 9.10 a.m.
3.	<b>Response rate to OIV statistical questionnaires</b>			9.10 a.m. - 9.20 a.m.
4.	<b>OIV Thematic Focus</b> - Presentation of the 2022/2023 Focus on the evolution of wine production and consumption by colour - Preliminary presentation on the approach to the 2023/2024 Focus on international trade flows and the main wine re-exportation platforms		193 & 283	9.20 a.m. - 11.00 a.m.
5.	<b>Presentation of the latest available data from OIV Member States on:</b> - Vineyard surface area - Production of wine, table grapes and dried grapes - Wine consumption - Wine imports and exports - State of wine stocks		97	11.30 a.m. - 1.00 p.m. 2.30 p.m. - 4.00 p.m.
6.	<b>OIV-UNWTO Project on Wine Tourism</b> - Report from the working group and presentation of the preliminary results		227	4.30 p.m. - 5.00 p.m.

<sup>1</sup> **Note:** Topics that delegations wish to add in accordance with the 2024 work programme will be discussed under the item 'Proposals for future work'. To do so, the completed project presentation documents must be returned to the OIV Secretariat with the working documents on the topic in question at least **15 days** before the OIV meetings, so that the delegates and experts may read these carefully. Failing this, the topic will not be presented during the meeting.

**Warning:** Taking into account the logistical and technical imperatives linked to the organisation of video-conferences, delegates and experts who plan to provide a document or make a presentation in accordance with the agenda are requested to do so **no later than 11 March 2024**. Otherwise, it will be technically impossible to share their document or presentation via the videoconference system.



	(UNWTO Secretariat Representative)			
7.	<b>Metadata and statistical data collection methods in OIV Member States</b> - Report from the working group - Definition of the future work programme and publications		146	5.00 p.m. - 5.40 p.m.
8.	<b>Proposals for future work</b>			5.40 p.m. - 6.10 p.m.
9.	<b>Information on the progress of ongoing projects on the 2023 work programme and on the projects to be included in the 2024 work programme</b>			6.10 p.m. - 6.20 p.m.
10.	<b>Any other business</b>			6.20 p.m. - 6.30 p.m.

## INTRODUCTION

The 6<sup>th</sup> session of the Statco Expert Group was held in Dijon (Dijon Metropole) and streamed on the KUDO platform on 2/4/2024. A total of 35 official delegates and experts representing 13 Member States and 1 Observer attended the meeting. The President of the Statco Expert Group, Mr Patrick Aigrain (FRA), assumed the role of chair of the meeting.

### 1. Adoption of the agenda

1.1. The Group adopted the agenda of the meeting without any objection.

### 2. Approval of the statement of conclusions of the 5<sup>th</sup> session of the “Statco” Expert Group

2.1. The proceedings report for the 5<sup>th</sup> session was unanimously approved.

### 3. Presentation of response rates of OIV statistical questionnaires

3.1. The Secretariat made a presentation on the return rates of OIV statistical questionnaires. In this framework, the three questionnaires that are systematically sent every year to each Member State were briefly described. In 2023, the return rates, ranging from 52% to 59%, increased compared to 2022 and the average observed over the previous ten years. The return rate for the March questionnaire 2024 peaked at 62%. It has also been highlighted that these positive results can be partly attributed to the new online questionnaire system, which was developed in the framework of the Digital Transformation Plan.



- 3.2. Conclusion: the group considers it important that the Secretariat keeps tracking progress in response rates and monitoring the performances of Member States.

#### 4. OIV Thematic Focus

- 4.1. The OIV Secretariat provided an overview of the findings from the 2023 OIV Thematic Focus study, focusing on the trends in global wine production and consumption categorised by colour. The report highlighted a decline in red wine production and consumption globally, contrasting with the rising popularity of white and rosé wines. However, the presentation underscored challenges such as data scarcity and inconsistencies between information gathered through the Thematic Focus questionnaire and the OIV statistical database. Notably, obtaining precise data on white and rosé wines posed particular difficulties, with complexities in categorisation and aggregation. For white wine, challenges stemmed from its diverse uses in both sparkling and transformed forms, while rosé wine suffered from a lack of clear definition, leading to its inclusion in red wine categories in many countries. The presentation concluded with a call for systematic data collection on the three main wine colours (red, rosé, and white) across all Member States.
- 4.2. Rafael del Rey (ESP) gave a second presentation on the preliminary results of the 2024 thematic focus. The study aims to analyse the main international trade patterns and identify the major re-export centres to get an estimate of the amount of wine that is re-exported. Given the complexity of the topic, it was reminded that this preliminary work is the outcome of several online meetings of a working group composed of Rafael del Rey (ESP), the President of the Group Patrick Aigrain (FRA), Christine Moulliet (FRA) and the staff of the Statistics Department of the OIV, which took place between June 2023 and March 2024. The presentation was divided into two parts. The first one focused on the approach used to estimate wine re-exports, the analysis of different groups of countries, and the methodology to estimate of wine re-exports in international trade. The second part showed some specific case studies on 14 countries that are considered to be major hubs. The president of the group as well as several experts present at the meeting highlighted the complexity and the interest of the study. Gergely Szolnoki (DEU) proposed to send a questionnaire to the Member States to get accurate re-export estimates. Raoul Compes (ESP) suggested that this work could be the basis for further analyses, for example on the global value chain. The president concluded by congratulating the work done so far and announced that this study will be a joint publication between OIV and OEMV (Observatorio Español del Mercado del Vino).
- 4.3. The OIV Director General (DG) congratulated the group of experts for their work, which is of great importance for the sector worldwide. In view of the next Congress that will celebrate the centenary of the OIV, the DG suggested that the thematic focus 2024-2025 should be on the statistical analysis of the evolution of the sector in the last 100 years. The first objective would be to present the preliminary results at the inauguration ceremony of the Congress taking place in October 2024. The full report is expected to be published in 2025, upon approval of the Statco group in March 2025. The president of the group agreed on the interest of such a study while at the same time highlighting the complexity of the task. By accepting this as a new theme for the focus 2024/2025, the president proposes to postpone the updating of the study on table and dried grapes, which was realized together with FAO in 2016, to 2025. In making this update, data on grape juices will be integrated into the report. For this reason, the IFU could also be involved.



- 4.4. Conclusion: the expected date of publication of the thematic focus on re-exports is the second semester of 2024. The new Thematic Focus for 2024-2025 will be on the evolution of the sector over the last 100 years, whose preliminary results will be presented by the OIV DG during the OIV Congress in October 2024. To meet this objective, a questionnaire will be sent to OIV Member States in April/May 2024. Moreover, an update of the focus study on unfermented products (i.e. grapes and juices) is foreseen for the 2025-2026 Thematic Focus.

## 5. Presentation of 2023 data on the vine and wine sector in the OIV Member States

- 5.1. Experts from ten Member States – S. Zulueta (ARG), R. Vanderlinde (BRA) F. Angevin (FRA), G. Szolnoki (DEU), T. Sarnari (ITA), Y. Van Der Merwe (ZAF), L. Barrado Cabrera (ESP), A. Mondoux (CHE), S. Wilson (NZL) - presented an interesting overview of their country's sectoral data and statistics for the year 2023, with a focus on the following variables: vineyard surface area, production, consumption, international trade and stocks of wine, table grapes and dried grapes.
- 5.2. Conclusion: the presentations and contributions made by the experts have been considered particularly important to better understand the evolution of the sector in the OIV Member States. It has therefore been decided to continue this action also in the WP 2025.

## 6. OIV-UNWTO Project on Wine Tourism

- 6.1. Sandra Carvao, Head of Market Intelligence and Competitiveness at UN Tourism, was invited to make a presentation on a joint project between OIV and UNWTO, which have created a Working Group with representatives from the Ministries of Tourism and Agriculture and Wine Tourism Experts from twelve countries. This initiative aims to foster knowledge and understanding of wine tourism and its impact on countries around the world by analysing how wine tourism is measured at the national level and discussing a possible comparable set of indicators at the global level. A joint report will be published in the second half of the year 2024.
- 6.2. Conclusion: the group has appreciated the work done by the joint working group and will evaluate the possibility of further collaborations with UNWTO in the future.

## 7. Metadata and statistical data collection methods in OIV Member States

- 7.1. The Secretariat together with the coordinator of the eWG on “metadata and data collection methods in the OIV Member States”, A. Mondoux (CHE), presented the activity report of the eWG whose objective is “improving the understanding, consistency, comparability, and quality of statistical data on the vine and wine sector, as well as highlighting best practices, main obstacles, and potential innovative solutions in sectorial data collection”. The presentation showcased a draft of the final report, summarising data and information gathered through past questionnaires. The report features comparative tables, and timelines, and highlights common issues and best practices. Feedback was sought from the group regarding the report's utility and potential for publication.
- 7.2. The President of the group complimented the eWG for the work done so far and proposed to finalise the work at the latest by the beginning of 2025. Several experts made remarks on the importance of dividing the report into chapters and providing an abstract at the beginning of



each section to make the study more accessible. It has been suggested that this study could be used to inspire future works of the group. In addition, for the eWG to get final feedback from the group of experts, the final output should be in one language (English) and shared with the group of experts at least one month before the next Statco session. Finally, it has been suggested by the president of the group that, in the framework of this collaborative work with the FAO, the preliminary results of the project on metadata and data collection methods will be shared with the Statistics Unit of the FAO.

- 7.3. Conclusion: the group decided to maintain the eWG with the mandate to simplify the draft report. It has been decided to shorten the study, divide it into several chapters and add an abstract to each section to ease the fruition and interpretation of results. The new draft will then be shared with the group of experts for their formal validation. The final report, once validated, will be published in 2025 as a document of collective expertise. Alexandre Mondoux (CHE) has been confirmed as coordinator of the eWG

## **8. Information on the progress of the ongoing draft projects of Working Plan 2024 and on the projects to include in Working Plan 2025**

- 8.1. The OIV Secretariat did not have time to present this item but indicated that all the activities and projects for 2024 are on schedule and will be continued in 2025. The only new entry in the working plan for 2024 and 2025 will be the new thematic focus studies.

## **9. Any other business**

- 9.1. No other issues having been raised, the President thanked the delegates and experts for their participation in the work conducted during this session of the STATCO Expert Group and declared the meeting closed. The next STATCO Group meeting will take place in the first quarter of 2025.