

COMMISSION OF THE EUROPEAN COMMUNITIES

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COMMUNICATION FROM THE COMMISSION TO THE COUNCIL
ON THE DEFINITIVE SUPPLY BALANCE FOR WINE FOR
THE 1992/93 WINE YEAR

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I. Total production

	1992/93			1991/92			AVERAGE FOR 1987/88-1991/92 WINE YEARS		
	Table wine	Quality wine	Other psr	Table wine	Quality wine	Other psr	Table wine	Quality wine	Other psr
D	805	12682	-	413	10291	-	277	10603	-
GR	3644	236	170	3603	355	64	3763	350	66
E	23187	9755	5039	18922	10508	3894	20272	10772	3502
F	29229	23554	12618	22407	16594	3688	30065	20973	8210
I	54941	10400	3345	48313	9207	2268	50712	9014	2637
P	5511	2260	-	7521	2400	100	6418	2412	20
Other	68	212	20	26	61	15	26	125	14
EUR-12	117385	59099	21192	101179	49355	10014	111533	54249	14449
TOTAL	197676			160650			180231		
EUR-12									

The harvest of the 1992/93 wine year was very good compared with the previous year's (+ 23%) and good compared with the average for the previous five years (+ 9.7%). The increase in production, at the level of the Member States, ranges between 53% in France and 14% in Spain. Portugal is the exception with a shortfall in production of 22% due to particularly bad weather conditions. Production of quality wines psr was 9.7 million hl up on the 1991/92 wine year (+ 20%) and approximately 5 million hl up on the five-year average (+ 8.9%). Table wine production was up on the previous year by 16.2 million hl (+ 16%) and by 5.8 million hl (+ 5%) on the five-year average.

II. Utilization

From now on the supply balance will be examined on the basis of the figures for the Community of Twelve since Community rules from this wine year apply to Portugal for the measures as a whole.

Total utilization for EUR 12 for the 1992/93 wine year, comprising human consumption, industrial utilization (including grape juice), losses, Community distillation and the net balance of exports to non-member countries, amounts to 193 995 000 hl.

1. Human consumption

EUR-12 consumption in 1992/93 was 129 million hl. This is slightly up on the previous year (+ 1 462 000 hl) (also in Portugal) but down by 3% on the average for the wine years 1987/88-1991/92. The greatest variations were in the United Kingdom (+ 13%), in Belgium (+ 9.4%) and in the Netherlands (- 8%).

In terms of types of wine, consumption of quality wines psr was 49 271 000 hl, rising 8.2%, whilst that of table wine was 71 443 000 hl, falling 3.1%. A comparison with the average figure for the previous five wine years confirms that consumption of quality wines psr is progressing (+ 8.2%) but reveals a steady downward trend for table wines (- 8.7%).

2. Industrial utilization

This comprises quantities for processing into on the one hand wine spirits, i.e. 8.47 hl of other wine, and on the other hand juice (6.69 million hl), vermouth (2.23 million hl) and vinegar (1.125 million hl).

Overall, industrial utilization absorbed 18.5 million hl, a substantially higher figure than the average for the period 1987/88 to 1991/92 (13.5 million hl). It should be mentioned here that in 1991/92 the harvest of the grape traditionally intended for making wine spirits had been very poor.

3. Community distillation

This involved 33 million hl, of which 26.8 million were accounted for by compulsory distillation, (including 15.5 million for preventive distillation) and 6.2 million by support distillation.

4. Import and export trade

Most trade in wine is intra-Community. However, in 1993 trade with non-member countries expanded to some extent. Community exports to non-member countries account for 9.6 million hl, an increase of 10% on the previous wine year.

Imports from non-member countries amount to 3.3 million hl, which gives a net export balance of 6.3 million hl (an increase of 16.6% on 1991/92).

III. Stocks

End-of-year table wine stocks in the Community of Twelve show an increase of 3 million hl, and this notwithstanding the large quantities of wine accounted for by distillation. This figure corresponds to the shortfall in table wine consumption in relation to the estimates given in the forecast supply balance drawn up at the beginning of the wine year.

Stocks of quality wines psr are up by some 5 million hl on the previous wine year, but this represents a purely fictitious increase since the stocks of vintage Port wines with mention of age (4 679 000 hl) which require long periods for maturing had not been declared until this wine year; they are now included in the supply balance.

IV. Conclusions

The current market organization has failed to achieve stabilization in the wine-growing sector.

The reduction in winegrowing areas, due to subsidized grubblings, has had the sole effect of compensating for the continuing fall in human consumption and the rise in yields, and the complex system of distillations has failed to act as a deterrent for wine producers.

The increase in stocks at the end of the 1992/93 marketing year after distillations confirms this observation.

This structural imbalance has had the effect of increasing the disparities between the different regional winegrowing economies and makes it necessary for the Community to pay out large sums to dispose of the surpluses.

The outlook for the wine sector in the medium term is one of large surpluses estimated to reach some 24 million hl by the year 2000. This prospect has prompted the Commission in July 1993 to present a discussion paper to the Council with a view to preparing a reform of the organization of the market in wine aimed at achieving a balance between production and consumption and, at the same time, improvement in quality.

B A L A N C E S H E E T W I N E													REF. : VINBIL46	
WINE YEAR 1992/93													1000 HL	
QUALITY WINES P&R RED ROSE WHITE													DATE : 20/10/94	
													PAGE : 3	
HEADINGS	BELG	DANM	DEUT	ELLA	ESP	FRAN	IREL	ITAL	LUXB	NORL	PORT	U.K.		
TOTAL PRODUCTION	:	:	:	:	:	:	:	:	:	:	:	:	:	21192
- GRAPE JUICE	:	:	:	:	:	:	:	:	:	:	:	:	:	5293
- WINE-MAKING	:	:	:	:	:	:	:	:	:	:	:	:	:	15899
STOCKS AT BEG. MAR. YR.:	23	5	217	179	368	48	5	100	57	158	:	226	:	1386
- PRODUCTION	:	:	:	11	368	:	:	38	2	:	:	:	:	573
- TRADE	23	5	206	25	48	48	5	62	55	158	:	226	:	813
AVAILABILITIES AT	:	:	:	:	:	:	:	:	:	:	:	:	:	:
BEG. MARKETING YEAR	23	5	217	349	1458	11422	5	3345	77	158	:	226	:	17285
IMPORTS	100	96	2825	6	7	529	20	32	41	391	:	1226	:	:
- INTRA EUR.	48	4	1504	6	4	328	11	6	41	33	:	:	:	:
- EXTRA EUR.	52	96	1321	6	3	201	9	26	:	358	:	1226	:	3298
TOTAL AVAILABILITY	123	101	3042	355	1465	11951	25	3377	118	549	:	1452	:	20583
HOME USES	78	93	2672	205	1495	11859	18	2920	21	396	:	1109	:	20556
- HUMAN CONSUMPTION	77	93	2584	195	977	529	18	2358	21	391	:	1109	:	8302
- PROCESSING	:	:	88	10	250	11260	:	562	:	:	:	:	:	12170
OF WHICH DISTIL.	:	:	88	:	250	11260	:	562	:	:	:	:	:	12160
- SPIRITS	:	:	88	:	:	8470	:	:	:	:	:	:	:	8470
- REGL. 822/87	:	:	88	:	250	2790	:	562	:	:	:	:	:	3690
- OTHER	:	:	:	:	:	:	:	:	:	:	:	:	:	:
OF WHICH VINEGAR	:	:	:	10	:	:	:	:	:	:	:	:	:	10
OF WHICH VERMOUTH	:	:	:	:	:	:	:	:	:	:	:	:	:	:
- LOSSES	1	:	:	:	8	70	:	:	:	5	:	:	:	84
OF WHICH PROD.	:	:	:	:	8	70	:	:	:	:	:	:	:	78
OF WHICH TRADE	1	:	:	:	:	:	:	:	:	5	:	:	:	6
EXPORTS	14	3	182	:	154	60	:	310	34	15	:	:	:	:
- INTRA EUR.	8	2	134	:	125	53	:	294	34	15	:	:	:	:
- EXTRA EUR.	6	1	48	:	39	7	:	16	:	:	:	:	:	-1193
STOCKS END MARK. YEAR	31	5	188	150	116	32	7	147	83	138	:	343	:	1220
- PRODUCTION	:	:	26	137	150	:	:	57	18	:	:	:	:	338
- TRADE	31	5	162	13	16	32	7	90	45	138	:	343	:	882
STOCK VARIATION	8	:	-29	-29	-252	-16	2	47	6	-20	:	117	:	-166
DEGRE OF SELF-SUFF.	0,00	0,00	0,00	0,83	1,17	1,25	0,00	1,38	0,95	0,00	:	0,00	:	0,94
POPULATION	9931000	5151000	79423000	10076000	37643400	56311000	3528000	57682000	374400	14938000	9816000	57373000	:	342246800
CONSUMPTION	:	:	:	:	:	:	:	:	:	:	:	:	:	:
PER CAPITA (LITRES)	0,78	1,81	3,25	1,94	2,46	0,94	0,51	4,09	5,61	2,62	0,00	1,93	:	2,43

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

BALANCE SHEET WINE															REF. VINBIL46
WINE YEAR 1992/93															1000 HL
															DATE : 20/10/94
															PAGE : 4
															TOTAL-VINS
															ROUGES ROSES BLANCS
															U.K.
DE DGVIA4	BELG	DANN	DEUT	ELLA	ESP	FRAN	IREL	ITAL	LUXB	NDRL	PORT	U.K.			
HEADINGS															
TOTAL PRODUCTION	2		13487	4050	37981	65401		68686	271		7771	27			197676
- GRAPE JUICE			5		3949	2145		600							6639
- WINE-MAKING	2		13482	4050	34032	63256		68086	271		7771	27			190977
STOCKS AT BEG. MAR. YR.	361	226	16431	2317	23647	40357	42	24164	184	411	10223	1068			119431
- PRODUCTION			9463	2121	19339	28421		16606	98		3885	13			76946
- TRADE	361	226	6968	196	5308	13936	42	7558	86	411	6338	1055			42485
AVAILABILITIES AT															
REG. MARKETING YEAR	363	226	29913	6367	57679	103613	42	92250	455	411	17994	1095			310408
IMPORTS	2461	1161	9721	58	69	6186	140	490	154	2018	54	6633			
- INTRA EUR.	2409	1065	8400	52	66	5985	131	464	154	1660	54	5407			
- EXTRA EUR.	52	96	1321	6	3	201	9	26		358		1226			3298
TOTAL AVAILABILITY	2824	1387	39634	6425	57748	109799	182	92740	609	2429	18048	7728			313706
HOME USES	2305	1149	18681	3342	29045	56108	140	53573	228	1965	7689	6777			181002
- HUMAN CONSUMPTION	2289	1149	18196	2860	16283	37354	140	35843	228	1941	5956	6777			139016
- PROCESSING	6		485	425	13204	18243		17480			1533				50476
- OF WHICH DISTIL.			485	339	11415	17642		15880			1958				47119
- SPIRITS						8470									8470
- REG. 822/87			485	339	11415	8494		15680			1358				37771
- OTHER						678		200							878
- OF WHICH VINEGAR	6			51	307	261		400			100				1125
- OF WHICH VERMOUTH				35	582	340		1200			75				2232
- LOSSES	10			57	458	511		250		24	200				1510
- OF WHICH PROD.				24	308	431		80			101				944
- OF WHICH TRADE	10			33	150	80		170		24	99				586
EXPORTS	152	30	2684	533	7199	10969	2	11387	94	84	2250	55			
- INTRA EUR.	146	23	1865	422	4529	8140	2	8809	94	84	1365	24			
- EXTRA EUR.	6	7	819	111	2670	2829		2578			885	31			9592
STOCKS END MAR. YEAR	367	208	18269	2550	21504	42722	40	27780	287	380	8109	896			123112
- PRODUCTION	64		11515	2374	15039	28534		20227	188		3190	20			80951
- TRADE	278	208	6754	176	6465	14188	40	7753	99	380	4919	876			42136
STOCK VARIATION	6	-18	1838	233	-2143	2365	-2	3616	103	-31	-2114	-172			3681
DEGRE OF SELF-SUFF.	600	0,00	0,74	1,35	1,93	1,33	0,00	1,80	1,19	0,00	1,23	0,00			1,33
POPULATION	9933333	5151000	79423000	10076000	37643400	58311000	3528000	57682000	374400	14938000	9816000	57373000			342246800
CONSUMPTION															
PER CAPITA (LITRES)	23,03	22,31	22,91	28,38	43,26	66,34	3,97	62,14	60,90	12,99	60,68	11,81			37,70

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

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