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Verordnung (EWG) 357/79 des Rates

THIRD BASIC SURVEY ON THE AREA UNDER VINES
Council Regulation (EEC) 357/79

TROISIEME ENQUETE DE BASE SUR LES SUPERFICIES VITICOLES
Règlement (CEE) 357/79 du Conseil

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1. INTRODUCTION

The purpose of this publication is to offer a synthesis of the results of the last basic statistical survey covering the total areas under vines which was conducted throughout the European Union in year 1999. To this end, the most relevant data collected by Member States have been selected from the "VITIS" database and have been used to draw up a series of summary tables, graphics and maps that we hope may give a concise overview of the European vineyard. Whenever possible, a comparison between the results of the 1989 and 1999 EU basic surveys has also been elaborated.

In this regard, it should be noted that whenever EU figures are offered, they refer to the total of the nine Member States on whose territory the area of vines cultivated in the open air is not less than 500 hectares. At present, only France, Germany, Greece, Italy, Luxembourg, Portugal, Spain, Austria and the United Kingdom carry out surveys on areas under vines. Data of the three basic surveys that have been carried out so far (1979, 1989 and 1999) are stored in the "VITIS" database (accessible via New Cronos) which is kept up, managed and updated regularly by Eurostat.

2. BACKGROUND OF COMMUNITY SURVEYS ON AREAS UNDER VINES

The Commission, in order to fulfil its obligations under the Treaty and the Community provisions on the common organization of the market in wine [Council Regulation (EC) 1493/1999], requires accurate up to date data on the production potential of the areas under vines in the Community and on medium-term trends in production and supply.

In order to assess the Community wine market situation and developments therein, every 10 years, beginning in 1979, basic statistical surveys covering the total areas under vines are conducted in vine - growing holdings. In between the basic surveys, smaller intermediate statistical surveys are also conducted but only on the area under vines of wine grape varieties.

These basic and intermediate statistical surveys allow production potential to be adjusted to market demand in good time, keep the development of wine production potential under constant observation, and enable the assessment of the production of wine in the Community. Such adjustment of production to the market can considerably reduce the ever-increasing costs of managing the wine market and enable a quick reaction to some well known problems as, for example, the recurrent the overproduction of table wine, which can create serious difficulties in the wine economies of certain producer Member States.

Therefore, detailed information is necessary on the use of the area under vines for the production of wine grapes, table grapes and material for vegetative propagation of vines, as well as on the varieties and the age of the vines. Within wine grapes, it is also necessary to record separately the area under vines intended for the production of quality wines psr and of table wines. Information on changes by way of grubbing, new planting or replanting in the area under vines of wine grape varieties, yields per hectare and on the mean natural alcoholic strength of fresh grapes, of grape must and of wine is also required. Given the existence of areas with widely differing yields, the area under vines of wine grape varieties should be subdivided into yield classes.

To this end, Member States on whose territory the total area of vines cultivated in the open air is not less than 500 hectares shall carry out:

- **Basic surveys** on the area under vines every 10 years (the first basic survey was carried out in 1979).
- **Intermediate surveys** on the changes taking place in the areas under vines of wine grape varieties from the second year after the basic surveys (the first intermediate survey was carried out in 1981 and related to changes during the two wine-growing years 1979/80 and 1980/81).

Vines cultivated in the open air in Member States with a total area under vines of less than 500 hectares, vines cultivated under glass and vines produced on very small areas solely for home consumption by the growers, are excluded from the surveys in view of their limited significance on the Community wine market and taking into account economic and technical reasons.

The surveys are to be implemented by the Member States following the specifications contained in Council Regulation (EEC) 357/79 of 5 February 1979 (OJ N° L54 of 5 March 1979, p.124) concerning the statistical surveys into the areas under vines, and ancillary technical legislation.

3. CHARACTERISTICS OF THE BASIC SURVEYS

3.1 Total area under vines

The basic surveys shall cover all holdings having a cultivated area under vines normally intended for the production for sale of grapes, grape must, wine or vegetative propagation material for vines. During the basic surveys, the following particulars shall be recorded for each holding:

1. Agricultural area in use

2. Area under vines cultivated. The area under vines cultivated is to be broken down according to its normal production use into:

   a) the area under wine grape varieties, further broken down into:
      - quality wines psr,
      - other wines: - including wine compulsorily intended for the manufacture of certain potable spirits obtained from wine with a registered designation of origin;

   b) the area under table grape varieties

   c) the area planted with root-stock for future grafting

   d) the area cultivated solely for the production of vegetative propagation material for vines subdivided into:
      - nurseries,
      - parent vines for rootstock.

   e) the areas under grapes intended for drying.

3. Varieties. Varieties that are classified simultaneously as wine grape varieties and table grape varieties shall be recorded according to their predominant use in the geographical units concerned. During the basic surveys, the following particulars are recorded for the area under wine grape varieties:

   a) Vine varieties. In the Member States concerned, a separate record is made for each geographical unit of those vine varieties which together constitute at least 70 % of the total area under wine grape varieties, and, in any case, of those varieties which constitute 3% or more of the said area. The remaining varieties may be grouped together according to the colour of the grapes.

   b) Age of the vines. The age of the vines is calculated from the wine-growing year in which they were planted or grafted. The age groups are established for each Member State concerned.

3.2 Methodology

Those Member States concerned shall submit to the Commission before 30 September of the preceding year a detailed description of the methods to be used for the basic surveys and, where appropriate, of the sampling plan. The Member States concerned shall take suitable measures to limit and, where necessary, to estimate errors of observation for the total area under vines cultivated for each type of production use.

The basic surveys may either be exhaustive, or based on random sampling. Whereas, since sample survey methods can produce accurate results at moderate cost over large areas under vines, Member States should be allowed to conduct the surveys either exhaustively or by sample, provided that standards of statistical reliability are laid down.

As regards the results of the basic surveys carried out by random sampling, the Member States shall take all the necessary measures to ensure that the sampling error at the 68 % confidence level shall be of the order of 1 % at most for the survey particulars within the geographical units concerned. The samples shall include holdings of all sizes.

3.3 Breakdown of the surveys

Independent of the survey method applied (exhaustive, or based on random sampling), the results of basic surveys are to be transmitted by Member States broken down in:

- 14 classes on the size of the area under vines.
- 14 classes on that part of the utilized agricultural area (UAA) under vineyard cultivation.
- 8 production classes according to the destination of the grape.
- 6 age groups of the varieties of wine grapes.

3.4 Periodicity of the survey and transmission of results

The basic survey on the area under vines should be carried out every ten years (starting in 1979), in those Member States on whose territory the total area of vines cultivated in the open air is not less than 500 hectares. At present, nine Member States (France, Germany, Greece, Italy, Luxembourg, Portugal, Spain, Austria and the United Kingdom) carry out surveys on the area under vines.

Basic surveys should be conducted before 1 April of the year following the reference campaign, and concerned Member States should notify to the Commission the results as soon as possible but not later than 15 months after completion of the field works. At the latest, these results should be notified on 1 April following the reference period (i.e. the wine-growing year).

The results of the basic surveys are to be submitted by geographical units (210) in the form of a schedule of tables. Therefore, the information provided by basic and intermediate surveys give an overview of wine-growing in the Community and also specific information concerning each of the 210 geographical units defined by Commission Decision No 99/661/EC of 9 September 1999 (OJ L261, 7.10.1999).

4. DATA PROCESSING AND DISSEMINATION OF RESULTS

Member States which process their basic survey results electronically shall submit these results to the Commission in a machine-readable form (at present, magnetic tape or diskette, even though e-mail is increasingly used).

The Commission shall study in consultation and continuing collaboration with the Member States, and if necessary, assisted by the Standing Committee for Agricultural Statistics the results supplied and the technical problems raised by the surveys and the collection of information to be communicated. Particular attention will be granted to the Community definitions relating to planting/replanting and the definition relating to cessation of wine growing, the significance of the findings of the surveys and the information communicated.

Within one year of communication of the results by the Member States concerned, the Commission shall submit to the Council these results, together with a report on the experience acquired during the basic surveys.

The results are to be disseminated via paper-based publications and are also available in machine-readable form. In order to provide users with access to the full range of information available on areas under vines, Eurostat has developed the "VITIS" database (accessible via New Cronos) containing all the data obtained from all the basic and intermediate surveys already completed. The full set of these data may be available, on request, on CD-ROM and diskette.

5. SYMBOLS AND ABBREVIATIONS USED

:	:	No data available
0	:	Figure less than half the unit used
-	:	Real zero (not applicable)
ha	:	Hectare
hl	:	Hectolitre
EU-15	:	European Union

Quality wine psr = Quality wine produced in a specified region
v.q.p.r.d. = Vins de qualité produits dans des régions déterminées
Qualitätswein b.A. = Qualitätswein bestimmter Anbaugebiete

Main results

6. Changes in the number of holdings, cultivated area under vines and utilized agricultural area (UAA) broken down by type of production

The following summary table and map (Figures 6-1 and 6-2) illustrate both the current characteristics and the development undergone by the European vineyard over the 1989-1999 period.

The European Union occupies a leading position on the world wine market, accounting for 45% of wine-growing areas, 60% of production and consumption and 70% of exports. After a long period of structural surpluses, the Community wine market has registered since 1994/1995 and overall balance between production and consumption, as a result of the measures taken to reduce the wine-growing areas.

The implementation of the Uruguay Round agreements in 1995 has resulted in a more open Community market in which traditional regulatory measures have lost much of their potential impact. Globalisation has brought along keener competition from third-countries and a substantial increase in imports, notably form Candidate Countries (Bulgaria, Rumania and Hungary), Argentina, Chile, South Africa, Australia and the United States. Most of these countries have developed aggressive commercial policies with the aim of gaining market quota, alongside quality products and highly competitive prices.

Bearing this circumstance in mind and taking into account the fact that European Union's vineyards are ageing, Council Regulation (EC) 1493/1999 of 17 May 1999 on the common organisation of the market in wine was passed. This new common organisation of the wine market is aimed at maintaining a better balance between supply and demand on the Community market, allowing producers to take advantage of expanding markets and enabling the sector to become more competitive in the long term. Besides simplifying considerably the legislation in this field, it is makes part of the general drive to clarify the Common Agricultural Policy that was launched in 1995 and reiterated in Agenda 2000.

6.1 Total area under vines

Even though the number of holdings having a cultivated area under vines has decreased slightly (-15,08%) in the European Union, significant differences are to be found among Member States. Whereas in Spain the number of holdings soared from 397.159 in year 1989 to 670.206 in year 1999 (+68,75%), figures plummeted down in all other Member States. The decrease in the number of holdings was especially noticeable in Greece (-38,35%), France (-33,92%), Portugal (-32,68%), and Luxembourg (-31,00%), and to a lesser extent in Germany (-11.35%).

As it may be observed in Figure 6-1, the drop in the number of holdings in the European Union came along with a reduction of the total area under vines. Even though Spain (+8.29%) and Germany (+1.93) increased their area under vines, it shrank in all other Member States notably in Greece (-27,28%) and Portugal (-19,10%). The breakdown of the total area under vines in the European Union highlights the overwhelming importance of wine-grapes and, among them, those intended for the production of quality wines.

Figure 6-1: Changes in the number of holdings, cultivated area under vines and utilized agricultural area (UAA) broken down by type of production

Type of production	Unit	EU-15			DEUTSCHLAND			ELLÀDA			ESPAÑA			FRANCE			ITALIA			LUXEMBOURG			PORTUGAL			ÖSTERREICH	UNITED KINGDOM	Unit	Type of production
		Total 1989	Total 1999	% change	Total 1989	Total 1999	% change	Total 1989	Total 1999	% change	Total 1989	Total 1999	% change	Total 1989	Total 1999	% change	Total 1989	Total 1999	% change	Total 1989	Total 1999	% change	Total 1989	Total 1999	% change	Total 1999	Total 1999		
TOTAL																													TOTAL
Holdings	N°	2 132 400	1 810 866	-15.08	77 388	68 603	-11.35	259 167	159 787	-38.35	397 159	670 206	68.75	166 272	109 869	-33.92	864 536	522 311	-39.58	871	601	-31.00	367 007	247 073	-32.68	32 044	372	N°	Holdings
UAA	ha	14 406 099	15 335 020	6.45	359 292	:	:	1 110 460	695 496	-37.37	4 265 355	8 133 841	90.70	2 472 877	2 070 272	-16.28	4 711 732	2 917 411	-38.08	2 917	:	:	1 483 466	1 197 227	-19.30	307 660	13 112	ha	UAA
Area under vine	ha	3 425 127	3 210 821	-6.26	102 357	104 335	1.93	137 669	100 109	-27.28	1 091 316	1 181 807	8.29	920 311	876 189	-4.79	905 425	681 843	-24.69	1 351	1 348	-0.22	266 699	215 758	-19.10	48 558	874	ha	Area under vine
WINE-GRAPE, TOTAL																													WINE-GRAPE, TOTAL
Holdings	N°	2 036 832	1 736 756	-14.73	76 683	68 598	-10.54	221 949	131 926	-40.56	371 693	644 709	73.45	164 727	108 771	-33.97	837 236	505 737	-39.59	871	601	-31.00	363 673	244 012	-32.90	32 030	372	N°	Holdings
UAA	ha	14015573	14 877 653	6.15	357 495	:	:	985 264	602 362	-38.86	4 158 457	7 899 079	89.95	2 453 336	2 050 141	-16.43	4 607 758	2 846 806	-38.22	2 917	:	:	1 450 346	1 158 614	-20.11	307 539	13 112	ha	UAA
Area under vine	ha	3 209 978	3 043 072	-5.20	102 028	104 233	2.16	74 147	50 878	-31.38	1 043 567	1 131 099	8.39	899 499	864 478	-3.89	834 153	636 662	-23.68	1 351	1 348	-0.22	255 233	205 003	-19.68	48 496	874	ha	Area under vine
QUALITY WINES p.s.r																													QUALITY WINES p.s.r
Holdings	N°	552 086	709 697	28.55	76 683	68 598	-10.54	29 579	24 115	-18.47	105 846	287 936	172.03	93 433	74 494	-20.27	90 070	101 025	12.16	871	601	-31.00	155 604	120 898	-22.30	32 030	0	N°	Holdings
UAA	ha	4 455 703	7 922 210	77.80	357 495	:	:	116 841	133 749	14.47	1 484 973	4 797 838	223.09	1 296 826	1 294 895	-0.15	781 657	884 867	13.20	2 917	:	:	414 994	503 323	21.28	307 539	0	ha	UAA
Area under vine	ha	1 422 277	1 847 474	29.90	102 028	104 233	2.16	13 300	13 671	2.79	506 437	786 772	55.35	509 513	545 230	7.01	190 609	230 706	21.04	1 351	1 348	-0.22	99 040	117 018	18.15	48 496	0	ha	Area under vine
OTHER WINES																													OTHER WINES
Holdings	N°	1 585 508	1 098 647	-30.71	-	-	-	198 415	107 811	-45.66	269 030	356 772	32.61	101 583	55 124	-45.74	778 380	437 475	-43.80	-	-	-	238 100	141 093	-40.74	0	372	N°	Holdings
UAA	ha	10628963	7 933 236	-25.36	-	-	-	897 399	468 613	-47.78	2 719 659	3 101 240	14.03	1 697 295	1 266 095	-25.41	4 202 103	2 345 668	-44.18	-	-	-	1 112 508	738 507	-33.62	0	13 112	ha	UAA
Area under vine	ha	1 787 701	1 195 598	-33.12	-	-	-	60 848	37 207	-38.85	537 130	344 326	-35.90	389 986	319 248	-18.14	643 544	405 957	-36.92	-	-	-	156 194	87 985	-43.67	0	874	ha	Area under vine
OF WHICH FOR SPIRITS																													OF WHICH FOR SPIRITS
Holdings	N°	10 355	6 684	-35.45	-	-	-	-	-	-	-	-	-	10 355	6 684	-35.45	-	-	-	-	-	-	-	-	-	0	0	N°	Holdings
UAA	ha	298 104	287 537	-3.54	-	-	-	-	-	-	-	-	-	298 104	287 537	-3.54	-	-	-	-	-	-	-	-	-	0	0	ha	UAA
Area under vine	ha	80 391	75 558	-6.01	-	-	-	-	-	-	-	-	-	80 391	75 558	-6.01	-	-	-	-	-	-	-	-	-	0	0	ha	Area under vine
TABLE-GRAPE																													TABLE-GRAPE
Holdings	N°	133 311	79 340	-40.49	-	-	-	41 066	20 283	-50.61	25 993	20 915	-19.54	12 574	5 490	-56.34	47 348	27 642	-41.62	-	-	-	6 330	5 010	-20.85	0	0	N°	Holdings
UAA	ha	846 021	516 305	-38.97	-	-	-	175 599	84 148	-52.08	145 764	120 979	-17.00	175 824	106 653	-39.34	255 973	143 607	-43.90	-	-	-	92 862	60 918	-34.40	0	0	ha	UAA
Area under vine	ha	145 704	96 236	-33.95	-	-	-	18 276	12 937	-29.21	33 940	29 338	-13.56	18 160	9 224	-49.21	66 706	39 582	-40.66	-	-	-	8 621	5 155	-40.21	0	0	ha	Area under vine
AREA NOT YET GRAFTED																													AREA NOT YET GRAFTED
Holdings	N°	11 532	11 824	2.53	-	-	-	796	359	-54.90	4 382	4 186	-	-	-	-	2 350	1 903	-19.02	-	-	-	4 004	5 376	34.27	0	0	N°	Holdings
UAA	ha	129 669	190 588	46.98	-	-	-	4 295	3 225	-24.92	81 522	107 530	-	-	-	-	15 163	14 522	-4.23	-	-	-	28 689	65 312	127.65	0	0	ha	UAA
Area under vine	ha	11 716	26 710	127.98	-	-	-	326	189	-41.91	7 301	19 891	-	-	-	-	1 617	1 783	10.28	-	-	-	2 472	4 846	96.04	0	0	ha	Area under vine
VINES FOR MATERIAL PROPAG. NURSERIES																													VINES FOR MATERIAL PROPAG. NURSERIES
Holdings	N°	4 636	2 668	-42.45	440	80	-81.82	72	78	8.33	286	1	-99.65	1 073	561	-47.72	2 338	1 790	-23.44	3	-	-	424	51	-87.97	107	0	N°	Holdings
UAA	ha	52 976	41 042	-22.53	4 128	:	:	619	283	-54.31	5 816	0	-100.00	21 263	15 912	-25.17	17 979	22 228	23.63	10	-	-	3 161	537	-83.03	2 083	0	ha	UAA
Area under vine	ha	3 373	3 630	7.63	278	79	-71.72	22	17	-20.73	409	0	-99.98	739	810	9.56	1 690	2 595	53.55	-	-	-	234	68	-70.87	62	0	ha	Area under vine
PARENT VINES																													PARENT VINES
Holdings	N°	2 168	2 047	-5.58	132	71	-46.21	169	200	18.34	490	395	-19.39	544	444	-18.38	695	616	-11.37	-	-	-	138	321	132.61	0	0	N°	Holdings
UAA	ha	36 610	32 590	-10.98	1 173	:	:	1 153	487	-57.76	7 037	6 254	-11.13	16 153	15 800	-2.18	9 747	7 527	-22.78	-	-	-	1 348	2 522	87.07	0	0	ha	UAA
Area under vine	ha	4 765	5 061	6.20	51	23	-54.02	32	12	-62.38	1 373	1 479	7.72	1 914	1 677	-12.39	1 258	1 221	-2.97	-	-	-	138	649	370.09	0	0	ha	Area under vine
GRAPES FOR DRYING																													GRAPES FOR DRYING
Holdings	N°	57 105	42 183	-26.13	-	-	-	53 138	42 145	-20.69	3 967	-	-	-	-	-	-	-	-	-	-	-	-	38	-	0	0	N°	Holdings
UAA	ha	239 225	191 171	-20.09	-	-	-	225 083	190 433	-15.39	14 143	-	-	-	-	-	-	-	-	-	-	-	-	738	-	0	0	ha	UAA
Area under vine	ha	49 592	36 112	-27.18	-	-	-	44 866	36 075	-19.59	4 726	-	-	-	-	-	-	-	-	-	-	-	-	37	-	0	0	ha	Area under vine

6.2 Wine grapes

The number of holdings that produced grapes intended for production of wine declined sharply in most Member States survey-on-survey to only 1.736.756. Again, the more striking reductions were observed in Greece (-40,56%) where only 131.926 holdings under this category were registered in year 1999, and also in France (-33,97%), Portugal (-32,90%) and Luxembourg (-31,00%). On the contrary, the number of holdings increased in Spain from 371.693 in year 1989 to 644.709 in year 1999 (+73,45%).

The total area devoted to wine-grapes also declined in the European Union, especially in Greece (-31,38%) and Portugal (-19,68%). As depicted in Figure 6-1, Spain (+8,39%) and Germany (+2.16%) were the only Member States that increased their respective surfaces. Nevertheless, it should be noted that the net increase registered in Spain (+87.532 new hectares) was about 40 times the net increase observed in Germany (+2.205 new hectares).

6.3 Quality wines p.s.r.

According to the last basic survey carried out in 1999, the number of holdings in which quality wines were produced has not varied much in the European Union since 1989. However, the overall figures cloak the different evolution of Member States. The huge increase in the number of holdings registered in Spain (+172.03%), where 182.090 new holdings have been inventoried offsets sharp decreases in Luxembourg (-31,00%), Portugal (-22,30%) and France (-20,27%) and a lighter recession in Germany (-10,54%).

Conversely, the area under vines devoted to grapes intended to produce quality wines increased steadily in almost all Member States. This means that compared with year 1989, fewer holdings specialised in quality wines are running nowadays, but their average size is bigger. This is particularly noticeable in some Member States as Portugal, France and Greece. In Portugal 34.704 holdings registered under this category in 1989 have disappeared, but there are 17.978 new hectares (+18,15%) dedicated to quality wines. In France, 18.939 holdings have disappeared in the last ten years, but 35.717 new hectares are under production. The exception may be found in Spain, were 182.090 new holdings are running and the total are intended for quality wines expanded +55,35% (roughly 280.335 new hectares).

6.4 Other wines

The results of the 1999 basic survey reveal that the number of holdings producing other wines in the European Union has fallen to just 1.098.647, well below (-30,7%) the figures observed in the 1989 basic survey. Except in Spain, where the number of holdings increased by 32,61%, all other member States reported sharp decreases, notably France (-45,74%), Greece (-45,66%) and Portugal (-40,74%).

The area under vines intended for the production of other wines plunged in all Member States. The most important cutbacks were observed in Portugal, that in the last ten years lost 68.209 hectares (-43,67%) dedicated

to this category of wines, followed by Greece (-38,85%), Spain (-35,90%) and France (-18,14%). It should be noted that in year 1989 Spain was, after Italy, the most important producer in this category of wines, and that in ten year's time the total area has gone down by 192.804 hectares.

6.5 Table grapes

The number of holdings producing table grapes has declined sharply (-40,5%) in all the European Union. The most important reductions were observed in France, were the number of holdings shrank to 5.490 (-56,34%), in Greece were only 20.283 holdings still produce table grapes (-50,61%), and in Portugal with just 5.010 holdings remaining (-20,85%).

In year 1999, the total surface used to cultivate table grapes in the European Union was well below of that recorded in year 1989. In France it dropped down to only 9.224 hectares (-49,21%), Portugal lost 3.466 hectares (-40,21%) and in Greece just 12.937 hectares remain in production (-29,21%).

6.6 Grapes for drying

The last basic survey on the area under vines reflects the diminishing importance of this type of production in the European Union. Greece, the most important and almost only European commercial producer of grapes for drying, reported that the number of holdings has fallen from 53.138 in year 1989 to just 42.145 in year 1999 (-20,69%).

This reduction in the number of holdings (–26,1%) has lead to a tailing away of the surface (-27,2%) dedicated to this type of production. Greece alone registered a loss of 8.791 hectares (-19,59%) in the last basic survey and Spain, that had 4.726 hectares in year 1989, has assessed the area currently under grapes for drying as negligible.

7. TRENDS IN THE AREA UNDER VINES BROKEN DOWN BY TYPE OF PRODUCTION (1989/1999)

The following graphics (Figures 7-1 to 7-9) intend to offer a snapshot for each Member State of the trends in the area under vines, broken down by type of production, registered in the period 1989-1999. For the sake of comparison and to give a better idea of the relative importance of the different types of production, Figures have been set up for all Member States according to a common structure.

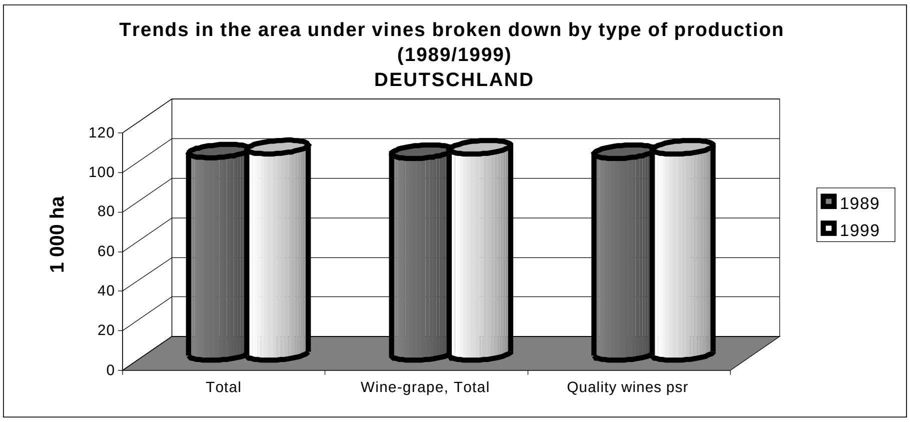
The first two columns on the left of all Figures (except for Austria and United Kingdom) represent the total area under vines recorded in years 1989 and 1999. The following columns offer a breakdown of this total area according to the most important type of production: wine-grapes, table grapes and grapes for drying. As specified in the basic survey, wine-grapes are to be further broken into quality wines and other wines. For the sake of comparison and given their economic relevance, the columns depicting the area variation observed survey-on-survey in quality wines and other wines have been placed just after the columns offering the area under wine-grapes.

7.1 Germany

As shown in Figure 7-1, the total area under vines in Germany has hardly changed in the last ten years: in year 1989 there were 102.357 hectares and in year 1999 this figure went up to 104.335 hectares (+1,93%).

Traditionally, Germany's area under vines has been intended for wine production. This wine production falls under the category of quality wines. For this reason, as depicted in Figure 7-1, the representation of Germany's total area under vines, wine-grape and quality wines are exactly the same.

Figure 7-1:

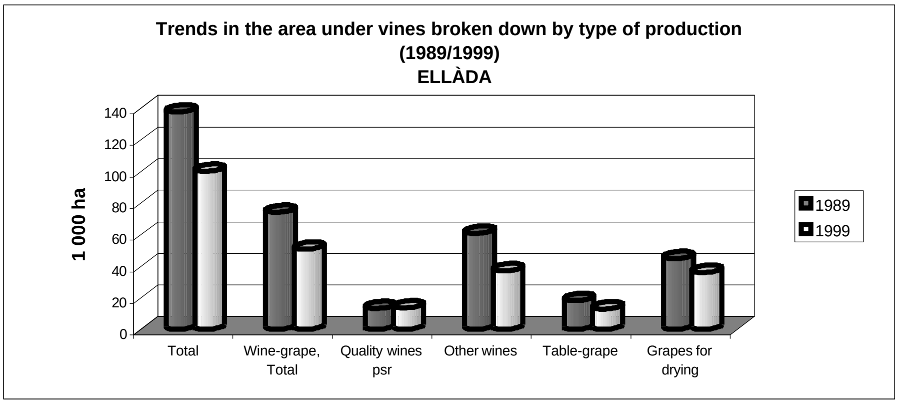


7.2 *Greece*

Total area under vines has decreased substantially in Greece over the last ten years. As it may be found in Figure 7-2, except quality wines that increased by 371 hectares (+2,79) all other types of productions suffered a reduction, particularly other wines (-38,85%).

Even though Greece is acknowledged as the European Union's sole commercial producer of grapes for drying, this type of production has lost up to 8.791 hectares (-19,59%) in the last ten years.

Figure 7-2:

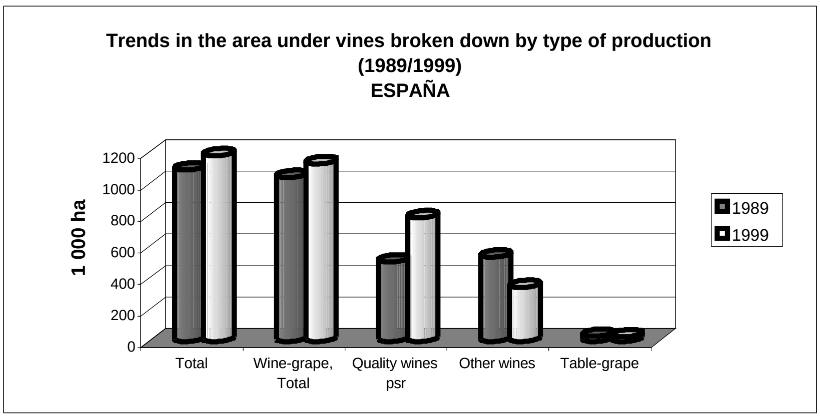


7.3 *Spain*

Spain is the sole Member State in which the total area under vines has increased in the last ten years, coming up from 1.091.316 hectares to 1.181.807 hectares (+8,29%). As pointed out in Figure 7-3, the commercial problems undergone by undifferentiated table wines led to a substantial reduction of other wines (-35,90%) and its shift towards quality wines. Together with brand new plantations, it led to an outstanding increase in the surfaces of quality wines put in production (+55,35%).

Despite the fact that the area used to produce table grapes shrank from 33.940 hectares to 29.338 hectares (-13,56%), its high commercial value jointly with its specific requirements regarding soil, temperature, and culture techniques, endears it as an important type of production in certain southern Spanish regions.

Figure 7-3:



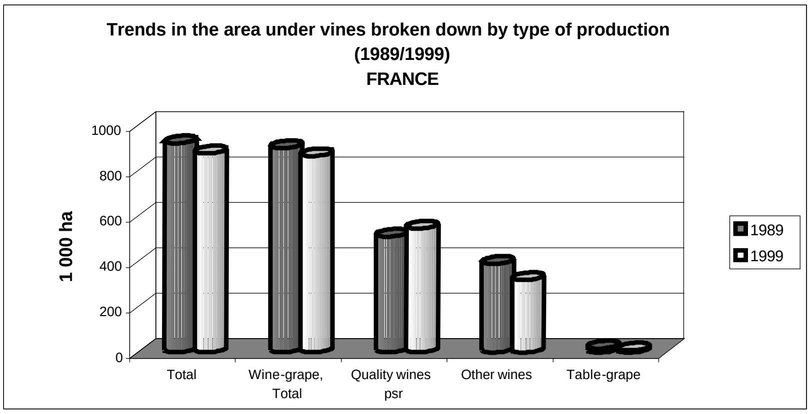
7.4 France

As depicted in Figure 7-4, the total area under vines has dropped by about 35.021 hectares survey-on-survey, coming down to 876.189 hectares in year 1999 from 920.311 hectares recorded in year 1989. This reduction was mainly due to the reduction observed in the surface intended for wine-grapes (-3,89%).

Nonetheless, it should be noted that while total area for quality wines rebounded slightly (+7,01%) due to 35.717 new hectares, that for other wines declined sharply (-18,14%), losing about 70.738 hectares.

The French surface for table grapes almost halved in the last ten years (-49,21%), plunging downwards from 18.160 hectares in year 1989 to scarcely 9.224 hectares in year 1999.

Figure 7 -4:

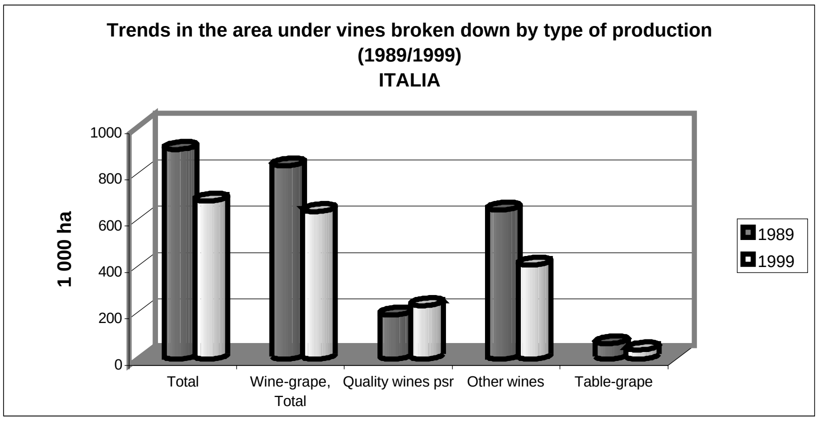


7.5 Italy

Despite a long tradition in wine growing, Italy has undergone an important reduction of its total area under vines during the last decade. Like in many other Member States, changes in consumption trends and increasing competition have forced a reduction (-24,70%) of the total area devoted to vines, which has come down from 905.425 hectares in year 1989 to just 681.843 hectares in year 1999. This dip in surface has come hand by hand with a shift from production of common table wines to more marketable quality wines.

As it may be found in Figure 7-5, the area devoted in Italy to quality wines increased by 40.097 hectares (+21,00%), whereas other type of productions suffered a considerable reduction, notably other wines (-36,90%). Even though Italy is still to be considered the first European producer of table grapes -well ahead Spain, Greece and France-, surface devoted to this kind of production retrenched from 66.706 hectares in year 1989 to only 39.582 hectares in year 1999.

Figure 7-5:

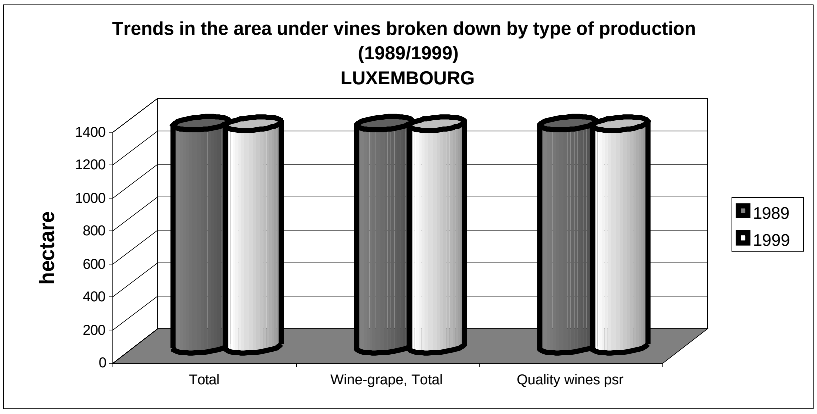


7.6 Luxembourg

In spite of the cutback observed in the number of holdings (-31,00%), the total area devoted in Luxembourg to vines has practically remained stable in the last ten years (-0,22%). Due to the special climatic and agronomic characteristics of the Mosella's valley, area under vines in Luxembourg is exclusively meant for the production of wine, notably of quality wines.

For this reason, Luxembourg's total area under vines, wine-grape and quality wines are exactly the same (gathering up to nearly 1.350 hectares), as depicted in Figure 7-6.

Figure 7-6:

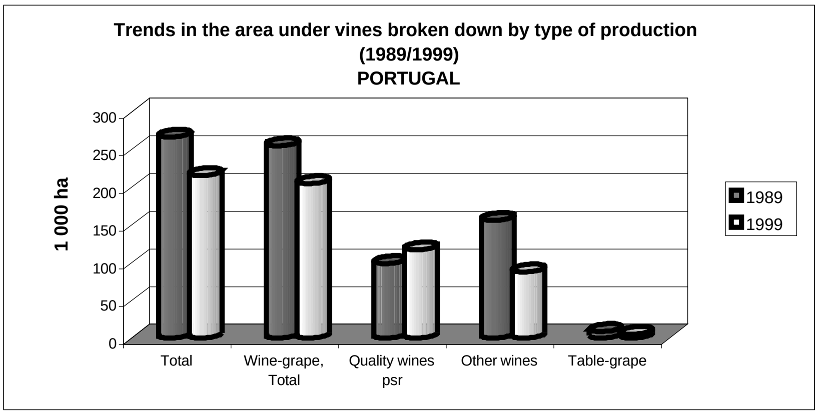


7.7 Portugal

In the last ten years Portugal has undergone an important backslide both in the number of holdings (-32,68%) and in the total area under vines (-19,10%). As shown in Figure 7-7, whereas total wine-grape area suffered a mighty reduction (-19,68%), not all types of productions fared alike: whereas quality wines jumped +18,15%, up to 117.018 hectares, other wines were seen down by -43,67%, to just 87.985 hectares.

This shift to quality wines was due mainly to the commercial crisis faced by the Portuguese wine sector in the mid 90's. The abundance of table wines in all European markets paved the way to a shift towards more value-added and market oriented quality products. Alike many other Member States who bore the brunt of the crisis, Portugal undertook an overhaul of its wine sector, which lead to an increase of 17.978 hectares in quality wines during the last decade.

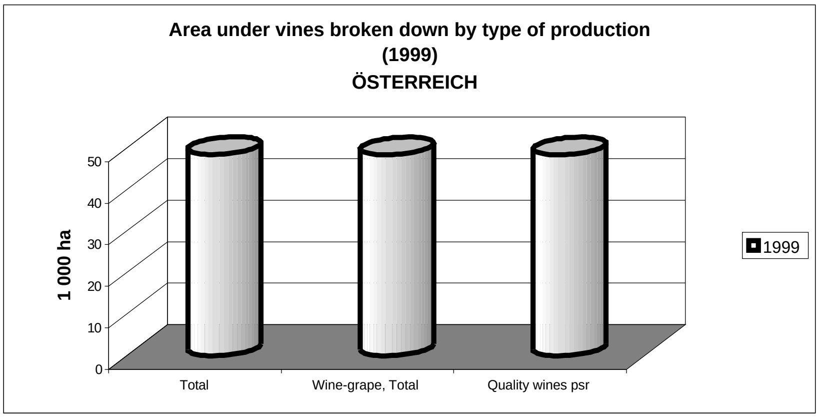
Figure 7-7:



7.8 Austria

Austria has only carried out one basic survey under vines in year 1999. In the light of the results, it may be said that wine production in Austria is unambiguously oriented towards quality wines. As depicted in Figure 7-8, with just 32.044 holdings, fifty times the number of Luxembourg (601 holdings) but just half the number registered in Germany (68.603 holdings), up to 99,97% of the total area under vines to be found in Austria (48.558 hectares) is devoted to wine production, notably quality wines (48.496 hectares).

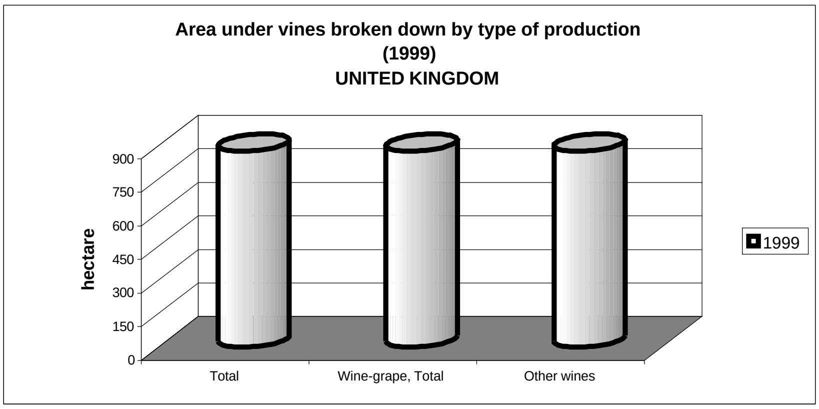
Figure 7-8:



7.9 United Kingdom

With only 372 holdings and a total area under vines of scarcely 874 hectares, the United Kingdom ranks last among the 9 Member States in whose territory areas under vines are cultivated, well behind Luxembourg (1.348 hectares). As reflected in Figure 7-9, all the surface devoted to vines in the UK is meant for the production of other wines. (Please note that the scale on the left refers to hectares).

Figure 7-9:



A summary overview of the survey-on-survey evolution of the area under vines in each Member State may be found in Figure 7-10. For the sake of detail, the trends in the area under vines are broken down by type of production.

Figure 7-10: Trends in the area under vines broken down by type of production (1989/1999) - Summary tables

	EUR-12			**EU-15**			**DEUTSCHLAND**			**ELLÀDA**			**ESPAÑA**		
	1989	**1999**	**Variation**	**1989**	**1999**	**Variation**	**1989**	**1999**	**Variation**	**1989**	**1999**	**Variation**	**1989**	**1999**	**Variation**
	thousand hectares		*%*	*thousand hectares*		*%*	*thousand hectares*		*%*	*thousand hectares*		*%*	*thousand hectares*		*%*
Total	3 425	3 161	-8	3 425	3 211	-6	102	104	2	138	100	-27	1 091	1 182	8
Wine-grape, Total	3 210	2 994	-7	3 210	3 043	-5	102	104	2	74	51	-31	1 044	1 131	8
Quality wines psr	1 422	1 799	26	1 422	1 847	30	102	104	2	13	14	3	506	787	55
Other wines	1 788	1 195	-33	1 788	1 196	-33				61	37	-39	537	344	-36
Table-grape	146	96	-34	146	96	-34				18	13	-29	34	29	-14
Grapes for drying	50	36	-27	50	36	-27				45	36	-20	5	-	-

8. Changes in the production of the area under wine-grape vines regarding the type of production

During the last decade, the most significant market problem faced by the Community wine sector was the limited ability to adapt swiftly to competitive changes on both the internal and the external market. This gave way to important surpluses on a multiannual basis, and even to dramatic fluctuations in production from one harvest to another. Therefore, among other measures, it seemed necessary to restructure vineyards by varietal conversion, relocation of vineyards or improvement of vineyard management techniques in those wine-growing areas were production was not at all aligned with demand.

In May 1999, Council Regulation No 1493/1999 on the common organisation of the market in wine was published (OJ L 179 of 14 May 1999) with the major aims of improving market balance, better align supply on demand for different types of product, allocate new planting rights, encourage quality productions and support restructuring and conversion of vineyards.

Figures 8-1 to 8-6 may give a good overall idea of the structural evolution undergone by Member States during the last decade, as they depict the changes in the production of the area under wine-grape vines regarding the type of production (total production, quality wines and other wines). They reflect the efforts made towards a better control of wine production in the EU and the development, of a policy encouraging quality production in wine growing.

Total production was seen down only in Italy and Portugal, with all other Member States registering a slight increase, as showed in Figures 8-1 and 8-2. This was partially due to the difficulties found in enforcing the existing measures governing planting rights. Many new areas were planted in breach of those measures, disrupting the wine market and leading to an increase of total production, which forced emergency market intervention measures. The low production registered in Spain in years 1994 and 1995 was due to the severe drought suffered by this Member State.

Figure 8-1:

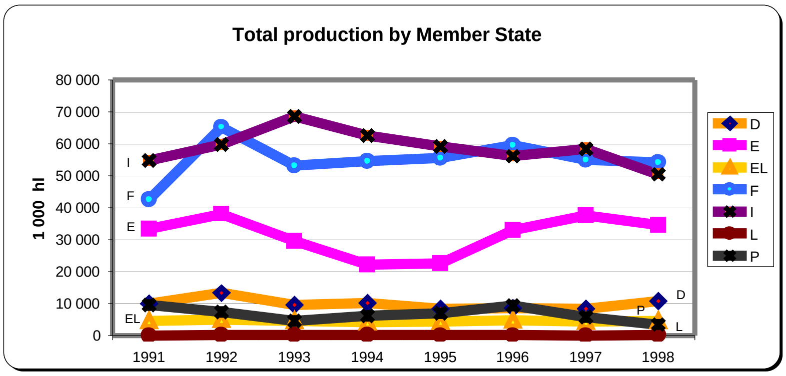


Figure 8-2:

Total production by Member State (1 000 hl)

	1991	1992	1993	1994	1995	1996	1997	1998
D	10 147	13 348	9 698	10 327	8 491	8 625	8 487	10 794
E	33 517	38 169	29 673	22 158	22 695	32 997	37 720	34 716
EL	4 589	4 977	4 581	4 240	4 356	4 751	4 501	4 669
F	42 689	65 401	53 285	54 640	55 610	59 650	55 112	54 271
I	54 866	59 788	68 686	62 672	59 290	56 202	58 495	50 563
L	86	271	169	175	150	128	75	160
P	9 653	7 407	4 576	6 316	7 021	9 413	5 861	3 529

Production of quality wines increased in almost every Member State, as showed by Figures 8-3 and 8-4. However, France and Italy kept and steady onwards trend, while Spain had some trouble in recovering from the drought suffered in years 1994 and 1995. Notwithstanding the increase in this type of wines, market experience showed the need to draw up precise rules intended to govern the production and movement of quality wines. Provisions intended to preserve particular quality characteristics and to enable better reclassification of quality wines seemed especially necessary.

Figure 8-3:

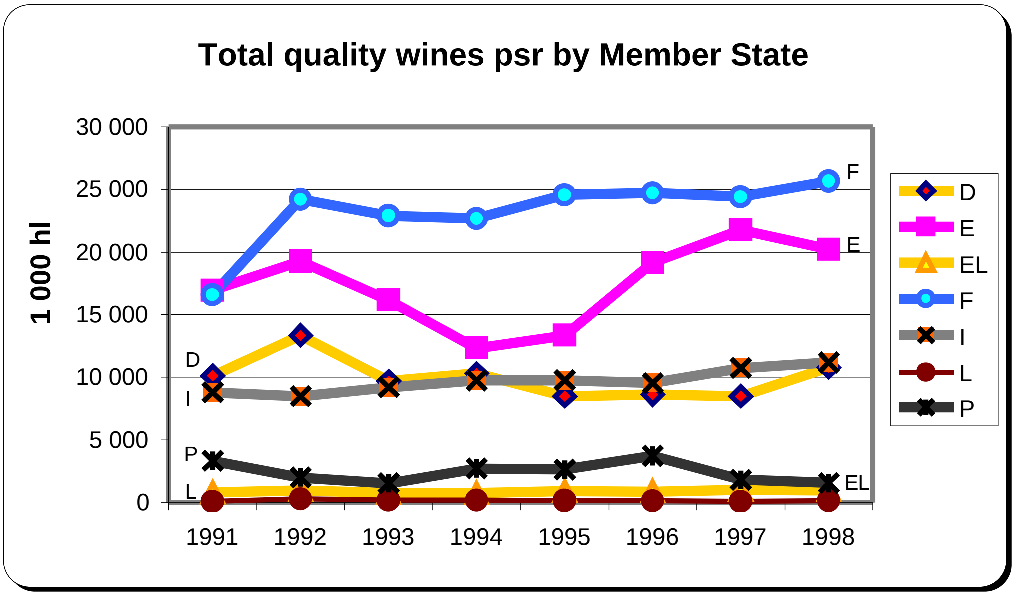


Figure 8-4:

Total quality wines psr by Member State (1 000 hl)

	1991	1992	1993	1994	1995	1996	1997	1998
D	10 147	13 348	9 698	10 327	8 491	8 625	8 487	10 794
E	16 965	19 264	16 160	12 335	13 342	19 143	21 790	20 222
EL	805	969	778	750	905	867	1 001	972
F	16 594	24 222	22 903	22 656	24 577	24 734	24 413	25 657
I	8 811	8 501	9 215	9 761	9 782	9 558	10 757	11 180
L	86	271	169	175	150	128	75	160
P	3 352	2 003	1 555	2 725	2 662	3 738	1 817	1 573

Since year 1962 the common market organization for wine was based on machinery aimed at controlling the market balance, especially that of table wines (excluding quality wines produced in specific regions). A price and intervention scheme involving distillation was applied to these wines, i.e. withdrawal at a guaranteed minimum price of production surpluses, which were subsequently processed into potable alcohol or fuel. International and internal competition set up tough market conditions for table wines, and the intervention scheme became sort of artificial outlet for structural surpluses, discouraging many producers and forcing a shift towards more marketable wines. As it may be observed in Figures 8-5 and 8-6, the production of wines other than quality wines has dipped steadily in most Member States in the last ten years. This is especially noticeable for Italy, and to a lesser extent for France. Other Member States (Spain, Greece and Portugal) also registered a slight decrease.

Figure 8-5:

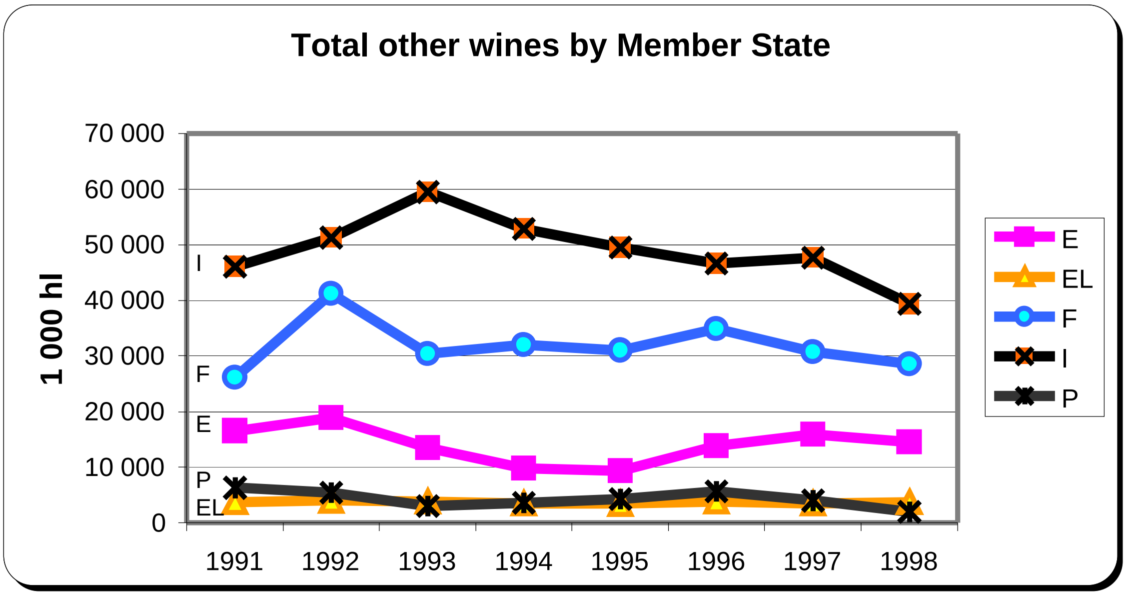


Figure 8-6:

Total other wines by Member State (1 000 hl)

	1991	1992	1993	1994	1995	1996	1997	1998
E	16 551	18 905	13 512	9 822	9 354	13 853	15 930	14 494
EL	3 784	4 007	3 802	3 489	3 451	3 884	3 500	3 696
F	26 095	41 179	30 381	31 984	31 033	34 916	30 699	28 614
I	46 055	51 287	59 471	52 910	49 508	46 644	47 737	39 383
P	6 302	5 404	3 021	3 591	4 359	5 674	4 044	1 956

9. Area under WINE-grape varieties broken down by varieties and age of the vine

During the last decade, most EU wine-growing areas have struggled to better align production on demand and thus offer to the markets high quality competitive products. Amongst the measures put in place to attain this objective, restructuring of vineyards by varietal conversion, relocation of vineyards or improvement of vineyard management techniques, where -whenever possible- encouraged as an alternative to more radical measures such as premiums for permanent abandonment of wine-growing. Despite their financial impacts on producers, namely loss earnings during the period of conversion and the costs of implementing those measures, restructuring and conversion measures where broadly welcomed in most regions, were more appropriate and productive varieties were planted.

Figures 9-11 to 9-18 offer an overview of the most significant wine grape varieties cultivated in Member States, broken down by variety and by age of the vines. Given the importance of certain Member States as wine producers, and for the sake of closer detail, a closer look to the different and most important black grape and white grape varieties cultivated in Greece (Figures 9-1 and 9-2), Spain (Figures 9-3 and 9-4), France (Figures 9-5 and 9-6), Italy (Figures 9-7 and 9-8) and Portugal (Figures 9-9 and 9-10) seemed appropriate. Needless to say that every country cultivates those varieties that are better adapted to their soil, terrain and climate, and serve better their traditional oenological practices and commercial interests.

GREECE

Figure 9-1:

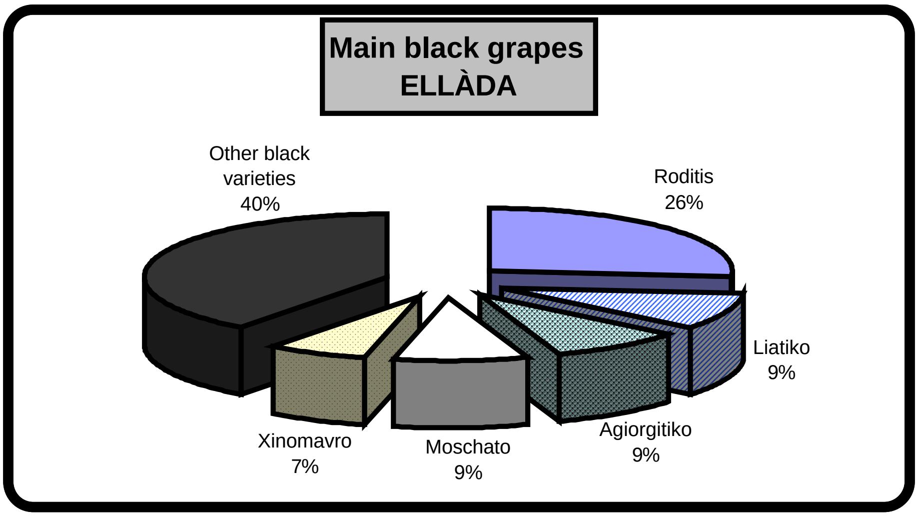
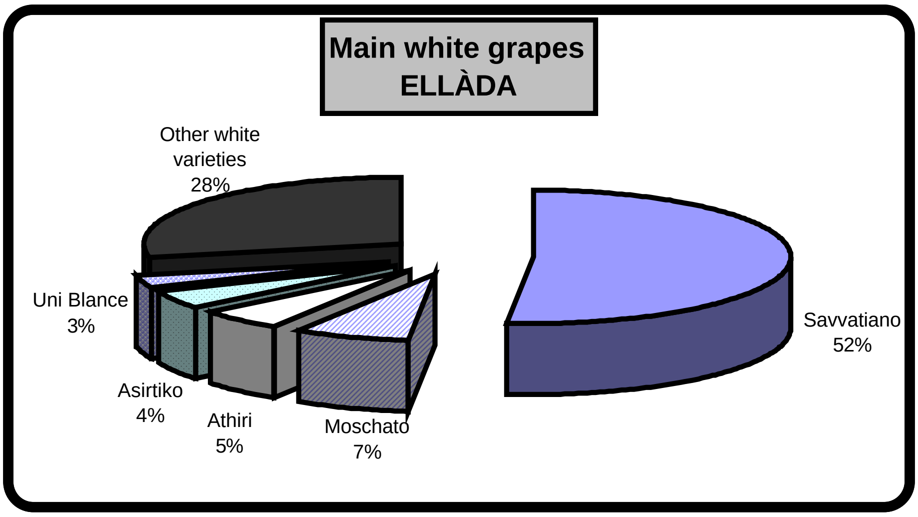


Figure 9-2:



SPAIN

Figure 9-3:

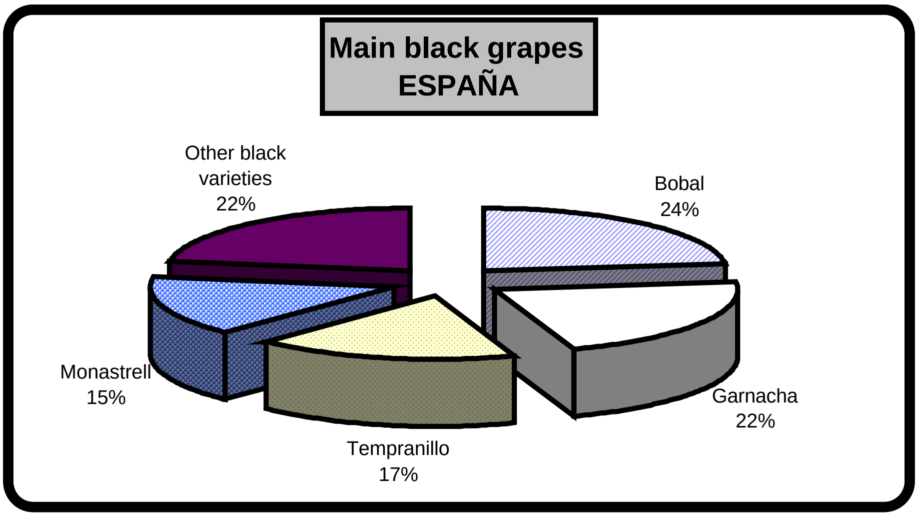
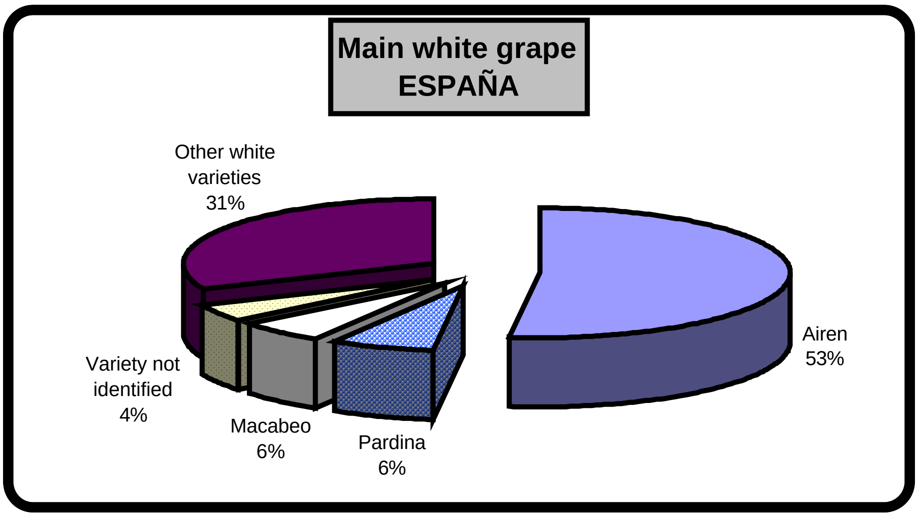


Figure 9-4:



FRANCE

Figure 9-5:

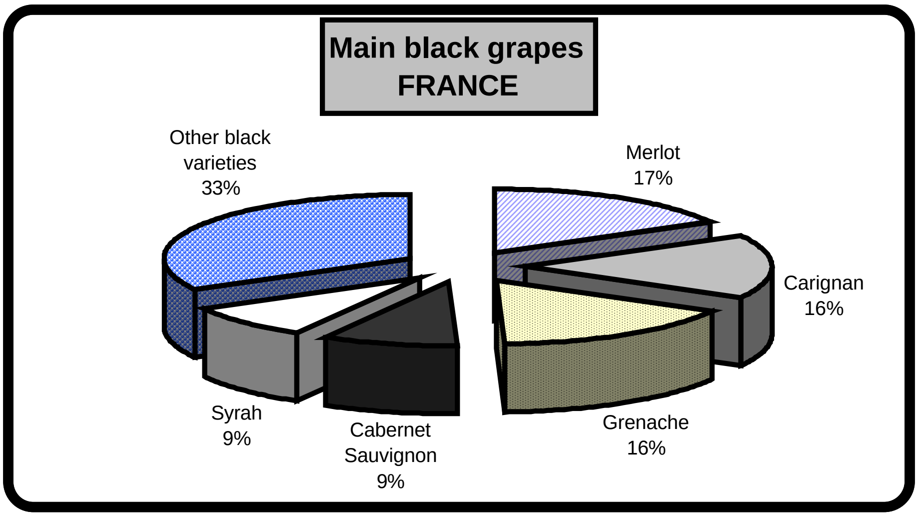
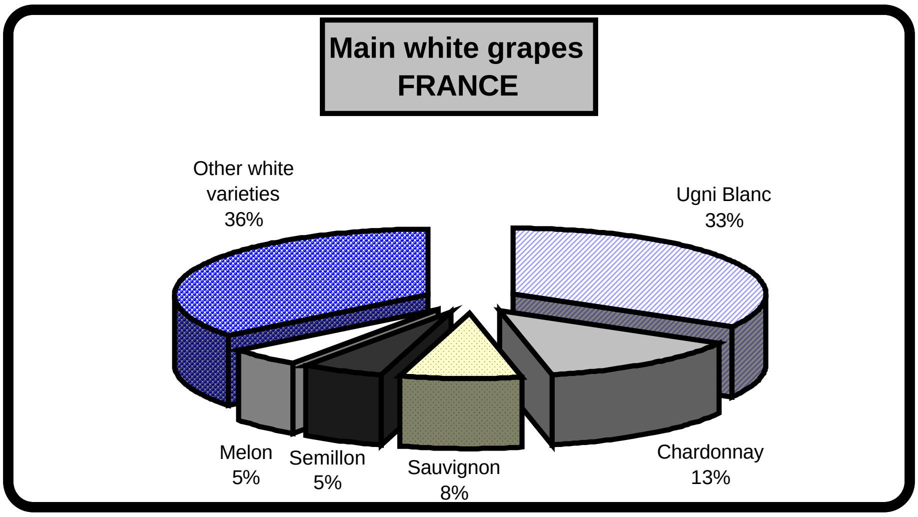


Figure 9-6:



ITALY

Figure 9-7:

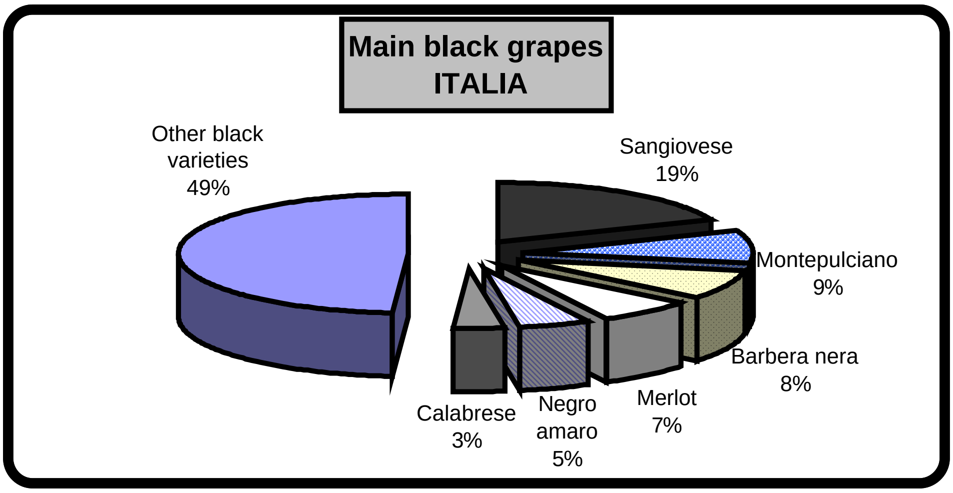
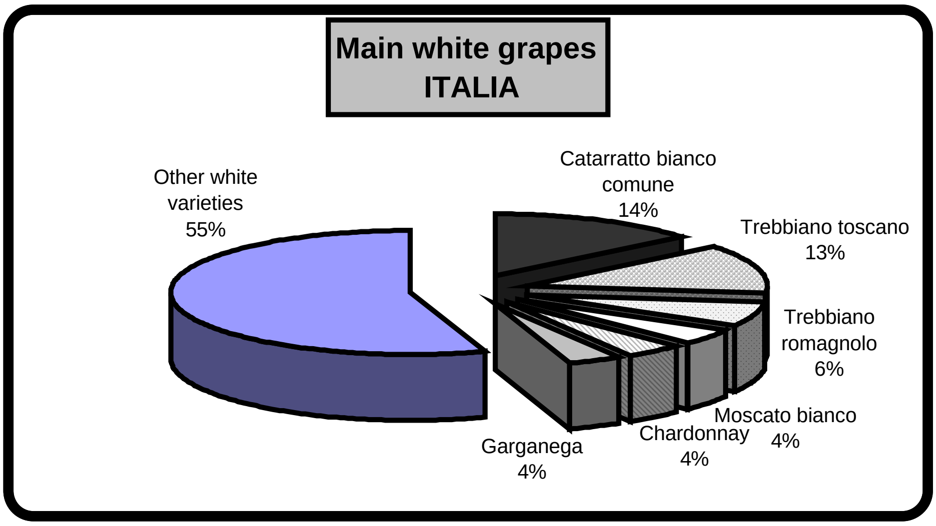


Figure 9-8:



PORTUGAL

Figure 9-9:

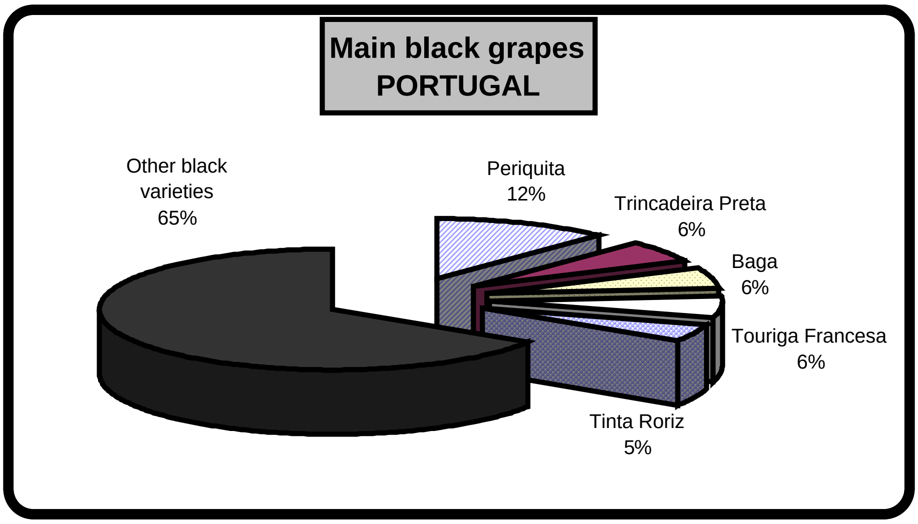


Figure 9-10: