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BI Daily

25 September 2024

GLOBAL TRENDS

Harvest Update - Europe, September 2024

Growers have said the crop has been coming in lighter than average and indeed wineries have confirmed juice yields have been lower than expected. There have also been reports of a significant production shortfall in the Pyrénées-Orientales and the eastern part of the neighbouring Aude department – by as much as 70% – due to lack of water.

It has been another challenging growing year in Italy, with most regions having experienced all or a combination of the following issues: spring rain, hail, mildew pressure, summer drought, and extreme temperatures.

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Chile's Wine Exports Show Signs of Recovery

In the first half of 2024, Chile's wine industry showed modest signs of recovery, following a sharp decline in exports the previous year. According to data from Chile's customs authorities, the country's wine and must exports registered a 2.1% increase in value (in USD) and a more substantial 14.1% rise in volume compared to the same period in 2023.

However, this recovery in volume does not tell the full story. Despite the increase in the number of liters exported, the average value per liter dropped by over 10%, from \$2.25 per liter to \$2.02 per liter—the lowest price point since 2017. These figures indicate that while Chile is moving forward, it is still far from regaining the levels of success seen in the first six months of 2022 and earlier years.

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MAJOR WINE PRODUCING COUNTRIES

French government asks EU for more cash to pull up vines

Plans have been submitted to the European Commission for €120 million in subsidies to pull up 30,000 hectares of French vineyards.

The strategy, which was created by the French government, the Nouvelle-Aquitaine region and the Bordeaux Wine Interprofessional Counsel, would see the uprooting of around 4% of the country's total 800,000 hectares of vineyards. The move is part of an even wider plan to remove 100,000 hectares of vineyards by the Ministry of Agriculture — more than a fifth of the total — although the EU request will only cover the initial 30,000ha.

That funding package totalled €57 million, with €38 million provided by the government and the remainder financed by the CIVB. The CIVB believed that pulling up roughly 10% of its vines will put the region back on a sustainable path. In the new deal, vineyard owners are being offered up to €4,000 per hectare in the vine-pull deal, and aren't allowed to replant vines until 2029 at the earliest.

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Spain announces five year plan to combat climate change

Spain has felt the brunt of climate change perhaps more severely than any other wine nation, with long-term droughts leaving great swathes of the country's vineyards parched – [especially in Catalonia](#).

"In addition to expanding the technical information on the different measures for adaptation to and mitigation of climate change, this update includes an ordering of priorities, and preliminarily identifies some lines of action," the release continued. "It also takes stock of the actions carried out in the previous plan and, in order to facilitate future monitoring, defines specific indicators for each new line of work, also identifying the main possible financing avenues and proposals."

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Italy Overtakes France as World's Top Wine Producer

Italy is set to regain its position as the world's leading wine producer in 2024, edging out France after a brief dip in output last year. According to data from Italy's primary agricultural association, Coldiretti, the country's wine production is expected to increase by roughly 8%, reaching between 41 and 42 million hectoliters. Meanwhile, France, facing significant climatic challenges, anticipates an 18% reduction in output, with the Ministry of Agriculture forecasting a total of 39.3 million hectoliters.

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