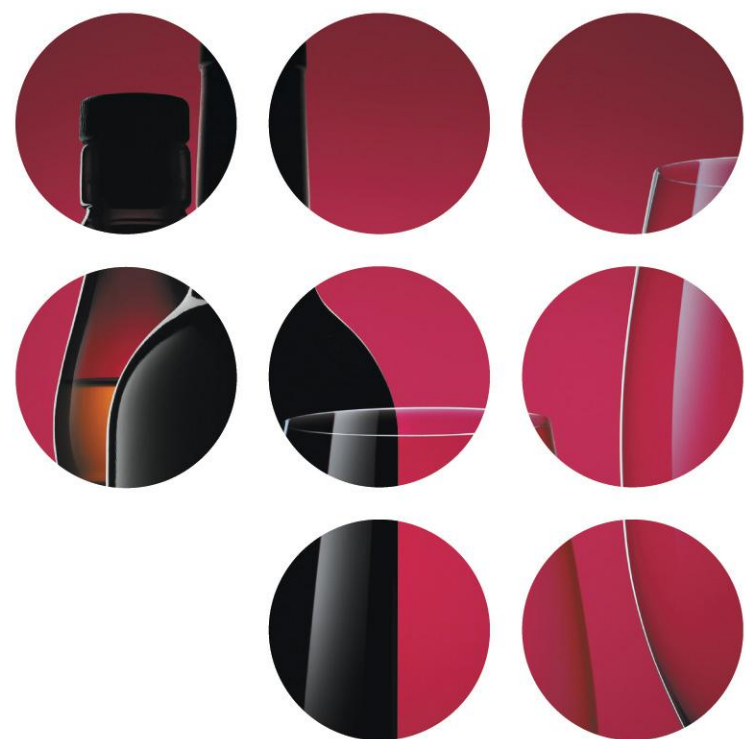




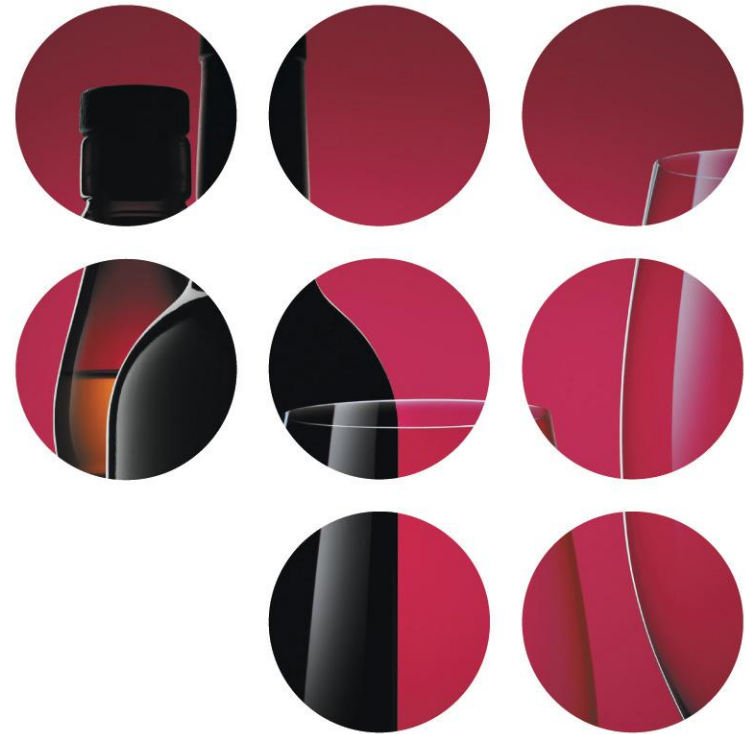
VINEXPO
2013
BORDEAUX
16-20 JUIN/JUNE



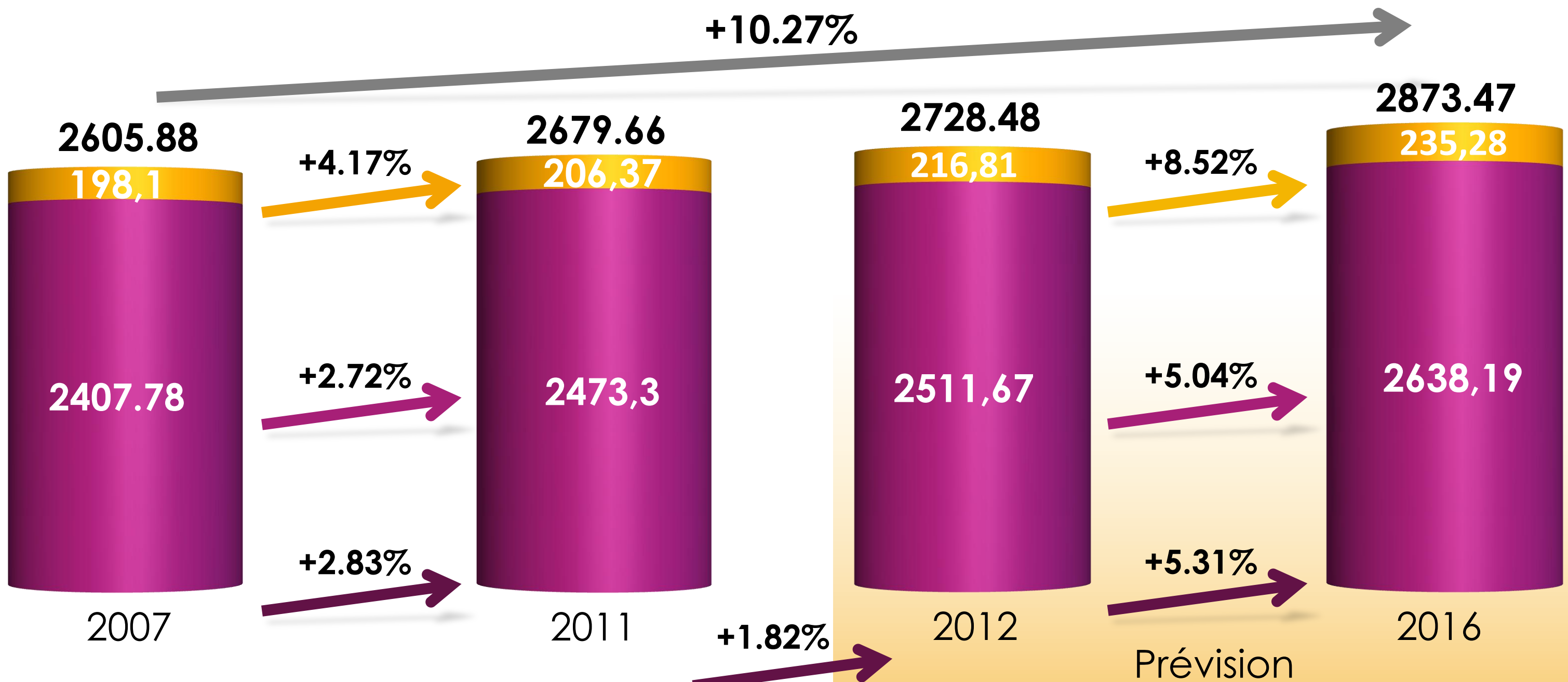
11^{ème} **ETUDE MONDIALE**
sur la conjoncture du secteur
du vin et des spiritueux
et prospective à l'horizon 2016.



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BORDEAUX
16-20 JUIN/JUNE



Le marché mondial du vin



TOP 10 DES PAYS CONSOMMATEURS

Volume – Millions de caisses de 9L

Vins tranquilles et effervescents

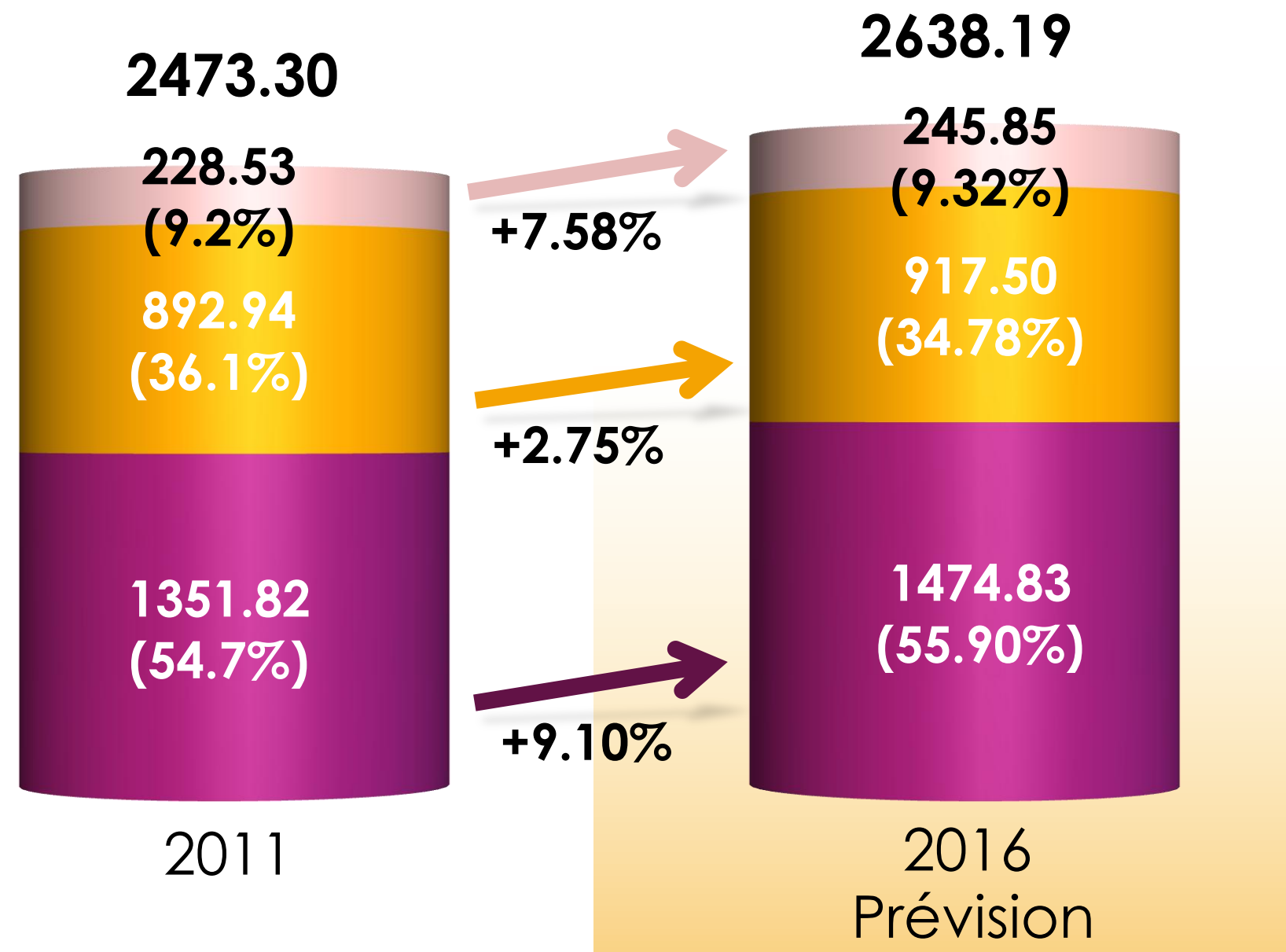
RANG 11/16	Pays	2007	2011	Evol 07/11	2012	2016	Evol 12/16	
44.94%	1/1	USA	288.52	317.87	10.17%	333.05	373.57	12.16%
	2/3	France	326.87	303.57	-7.13%	300.92	292.17	-2.91%
	3/4	Italie	310.94	303.12	-2.51%	299.59	284.96	-4.89%
	4/2	Allemagne	287.53	279.69	-2.73%	285.75	295.78	3.51%
	5/5	Chine (incl. HK)	63.96	155.94	143.82%	177.06	247.31	39.67%
	6/6	Royaume-Uni	144.52	138.65	-4.07%	134.87	129.93	-3.66%
	7/8	Argentine	124.46	108.25	-13.02%	107.62	105.05	-2.38%
	8/7	Russie	92.07	93.89	1.98%	97.83	115.23	17.79%
	9/9	Espagne	109.34	87.83	-19.67%	84.60	80.96	-4.31%
	10/10	Australie	50.04	56.40	12.72%	57.10	59.30	3.85%
TOTAL TOP 10		1798.24	1845.21	2.61%	1984.26	1878.57	5.63%	
Monde		2605.88	2679.66	2.83%	2873.47	2728.48	5.31%	

67.67%

CONSOMMATION MONDIALE

Volume – Millions de caisses de 9L

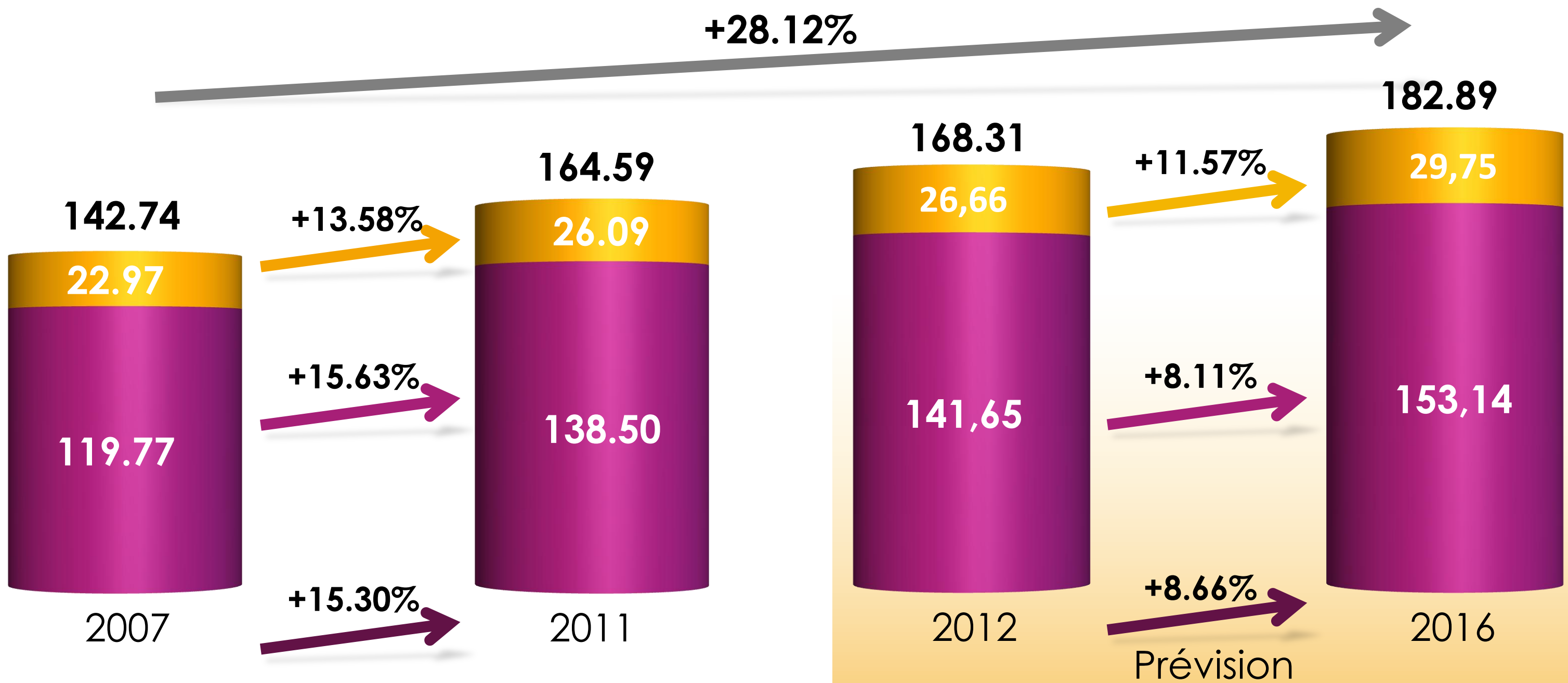
Vins tranquilles



CONSOMMATION MONDIALE

Valeur* – Milliards USD

Taux de change moyen en 2011 (1USD=0,719€)



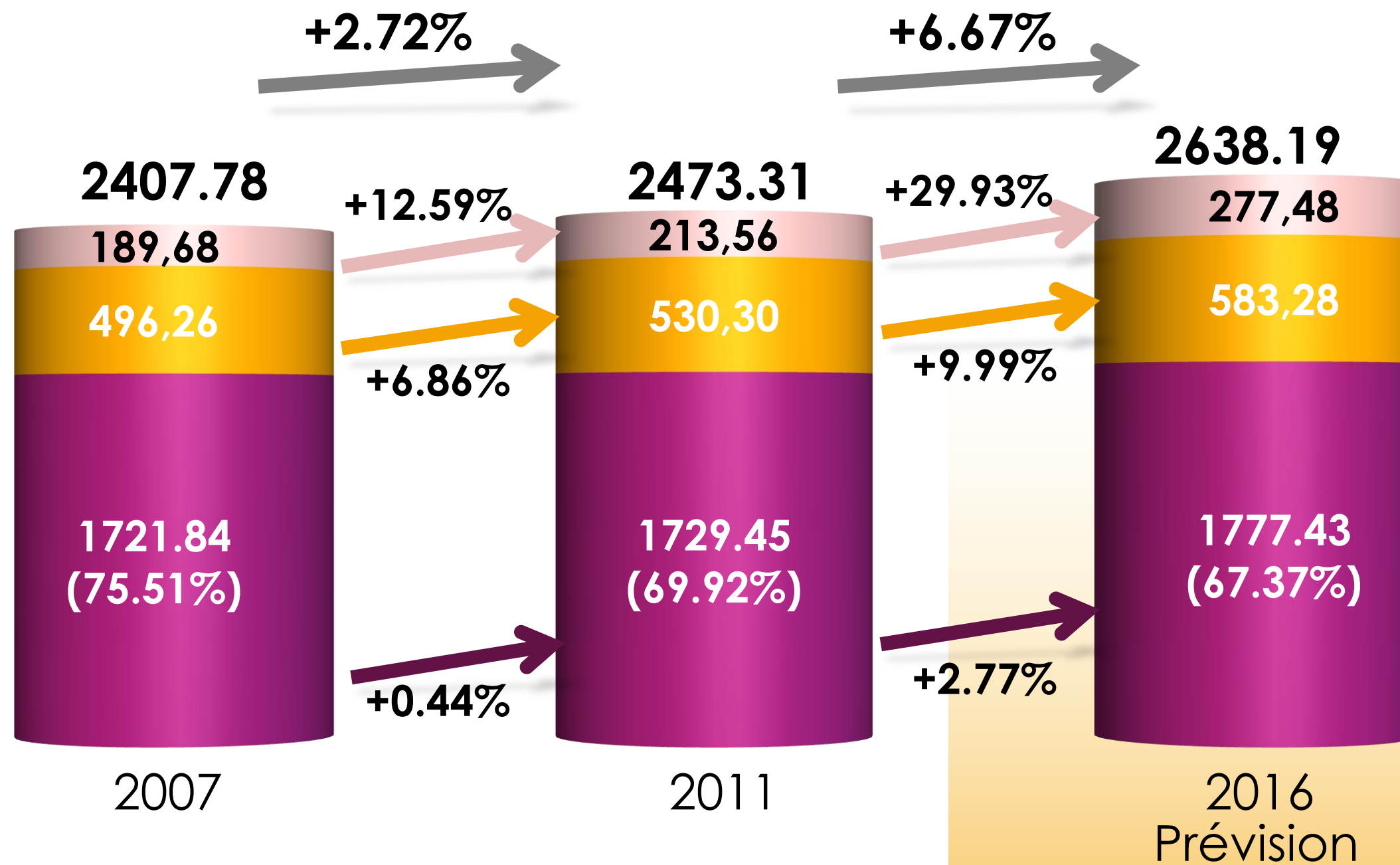
■ vins Tranquilles ■ Vins Effervescents

*Ventes TTC au stade de la distribution

CONSOMMATION MONDIALE

Volume – Millions de caisses de 9L

Vins tranquilles



Moins de 5 USD*

Entre 5 et 10 USD*

Plus de 10 USD*

*Ventes TTC au stade de la distribution

TOP 10 DES EXPORTATEURS

Valeur – Millions USD

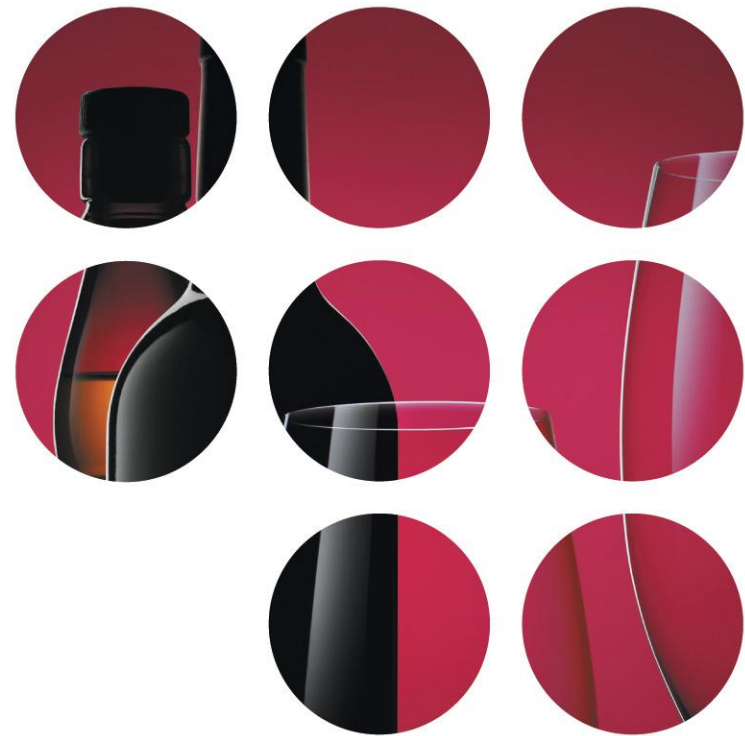
Vins tranquilles et effervescents

RANG Valeur/Volume 2011	Pays	2007	2011	Evol 07/11
1/3	France	9409.47	9902.64	5.24%
2/1	Italie	3967.70	6057.80	52.68%
3/2	Espagne	2366.23	2941.41	24.31%
4/4	Australie	2483.90	1963.80	-20.94%
5/5	Chili	1264.70	1683.20	33.09%
6/6	USA	814.70	1147.30	40.82%
7/8	Argentine	378.05	847.60	124.20%
8/10	Allemagne	619.30	587.50	-5.13%
9/9	Portugal	264.60	366.40	38.47%

PAS DE PREVISIONS...



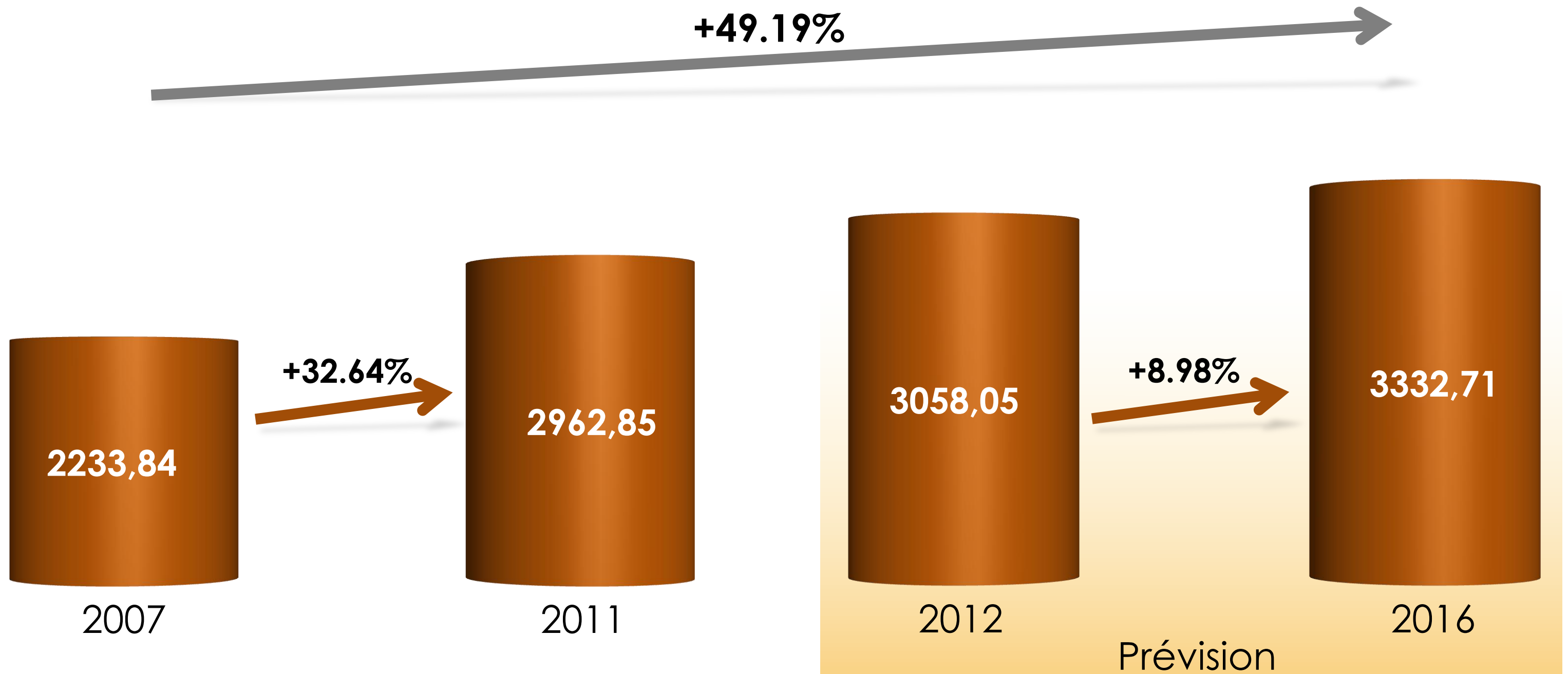
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2013
BORDEAUX
16-20 JUIN/JUNE



Le marché des Spiritueux

CONSOMMATION MONDIALE DE SPIRITUEUX

Volume – Millions de caisses de 9L

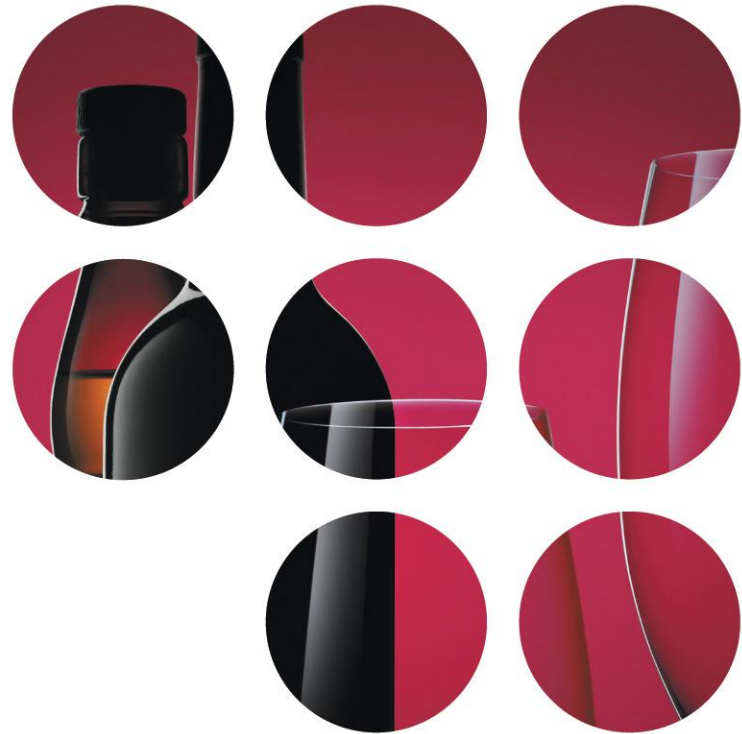


Catégories	2007	2011	Evol 07/11	2012	2016	Evol 12/16
Vodka	517.19	491.68	-4.93%	486.22	493.80	1.56%
Brandy	121.35	149.54	23.24%	153.35	161.42	5.26%
Rhum	118.32	144.74	22.32%	148.25	163.42	10.24%
Scotch Whisky	84.92	86.56	1.93%	88.76	99.41	12.00%
Liqueurs	83.03	84.86	2.20%	84.59	86.93	2.77%
Gin	48.82	48.04	-1.60%	47.50	47.09	-0.85%
Bourbon	28.09	30.47	8.44%	31.24	34.19	9.44%
Tequila	22.51	24.31	8.00%	25.02	27.60	10.33%
Cognac/Armagnac	10.93	10.83	-0.92%	11.28	12.66	12.22%
Autres spiritueux	706.00	752.28	6.55%	757.88	802.23	5.85%
TOTAL	2233.84	2962.85	32.64%	3058.05	3332.71	8.98%
Baijiu	492.67	1139.55	131.30%	1223.97	1403.97	14.71%



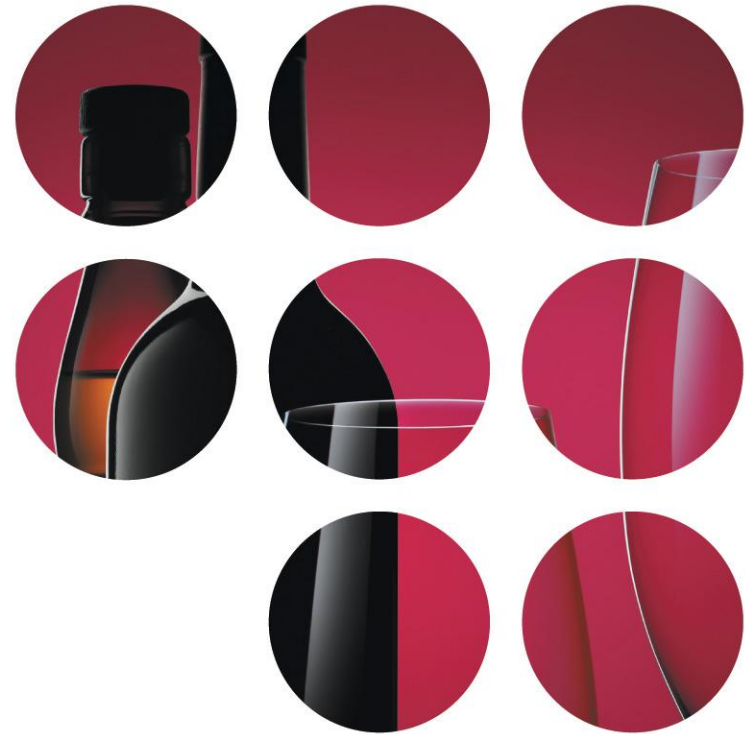
VINEXPO
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BORDEAUX
16-20 JUIN/JUNE

FRANCE





VINEXPO
2013
BORDEAUX
16-20 JUIN/JUNE

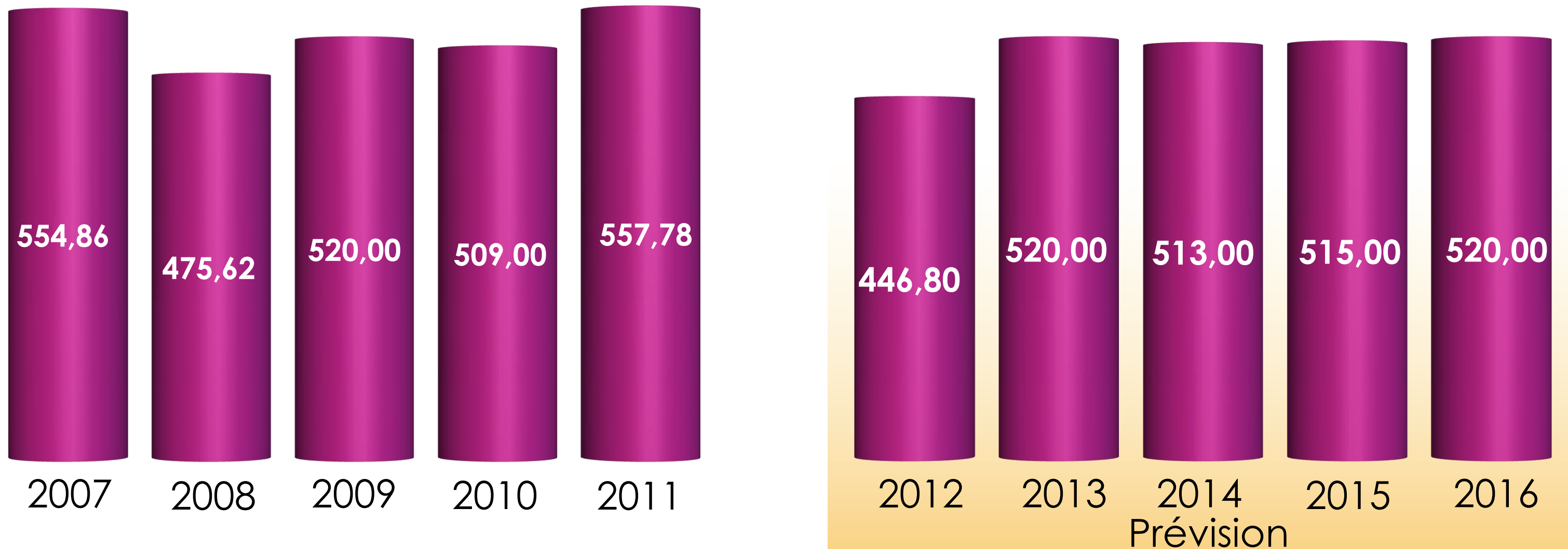


La production de vin

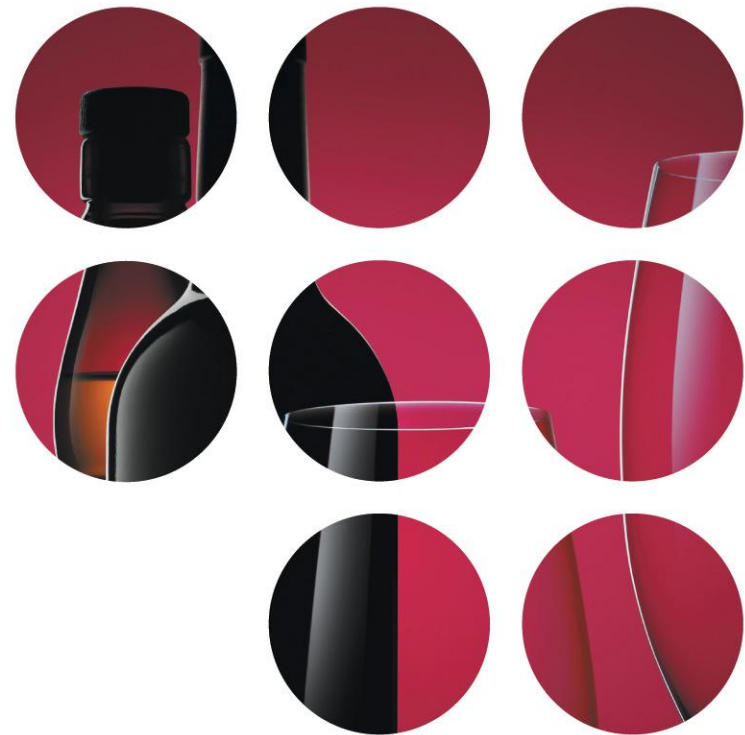
Moyenne – 2007 / 2011 → 523.45

-3.91%

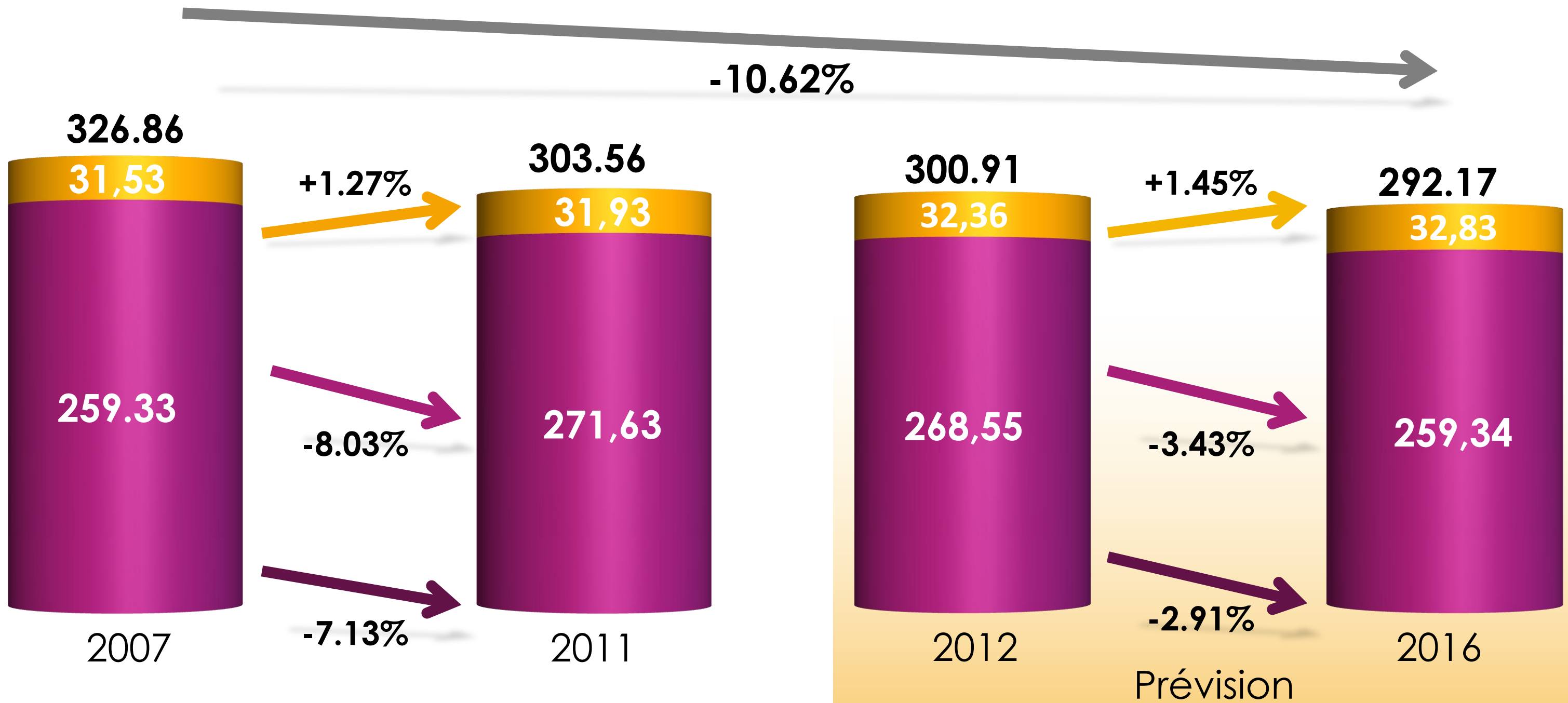
Moyenne – 2007 / 2011 → 502.96

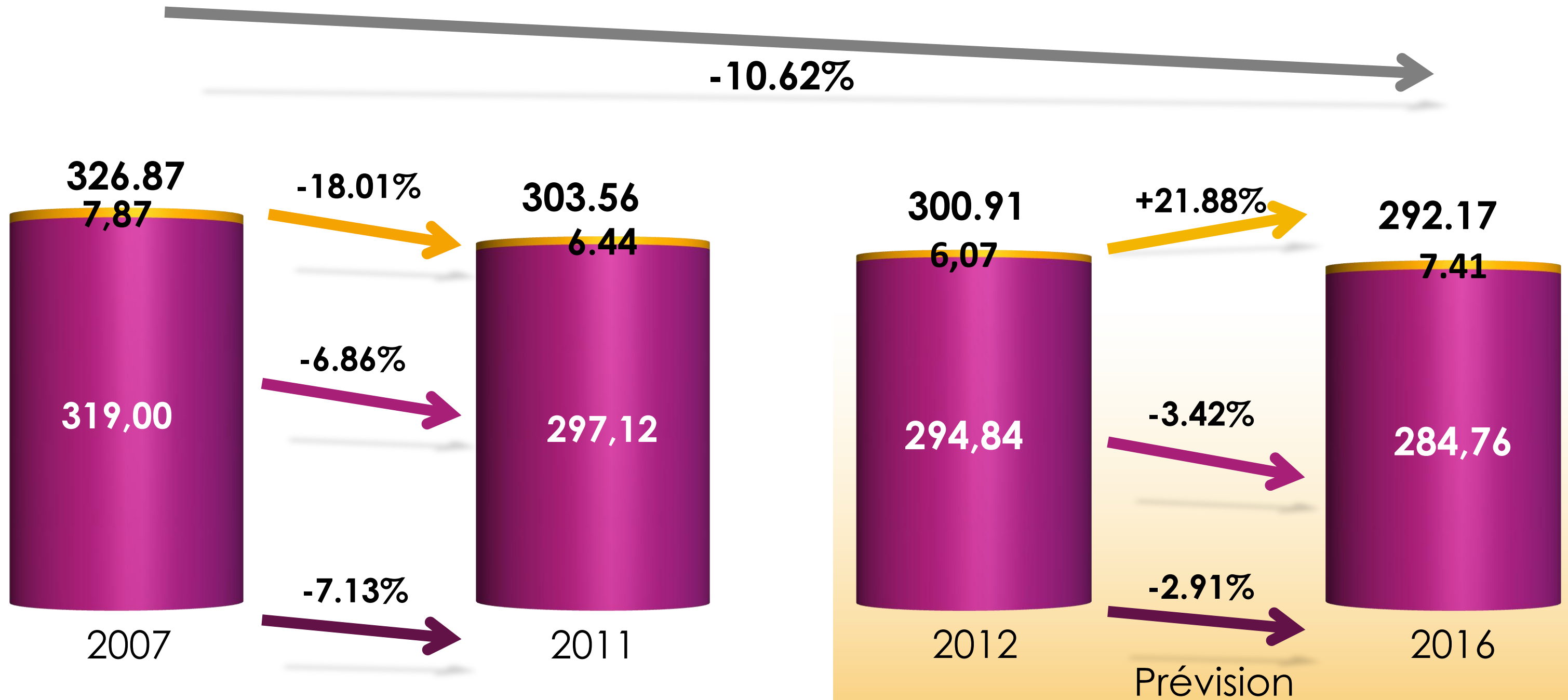


■ Production de vin de raisin (Incl. vin de raisin pour Eaux de vies)



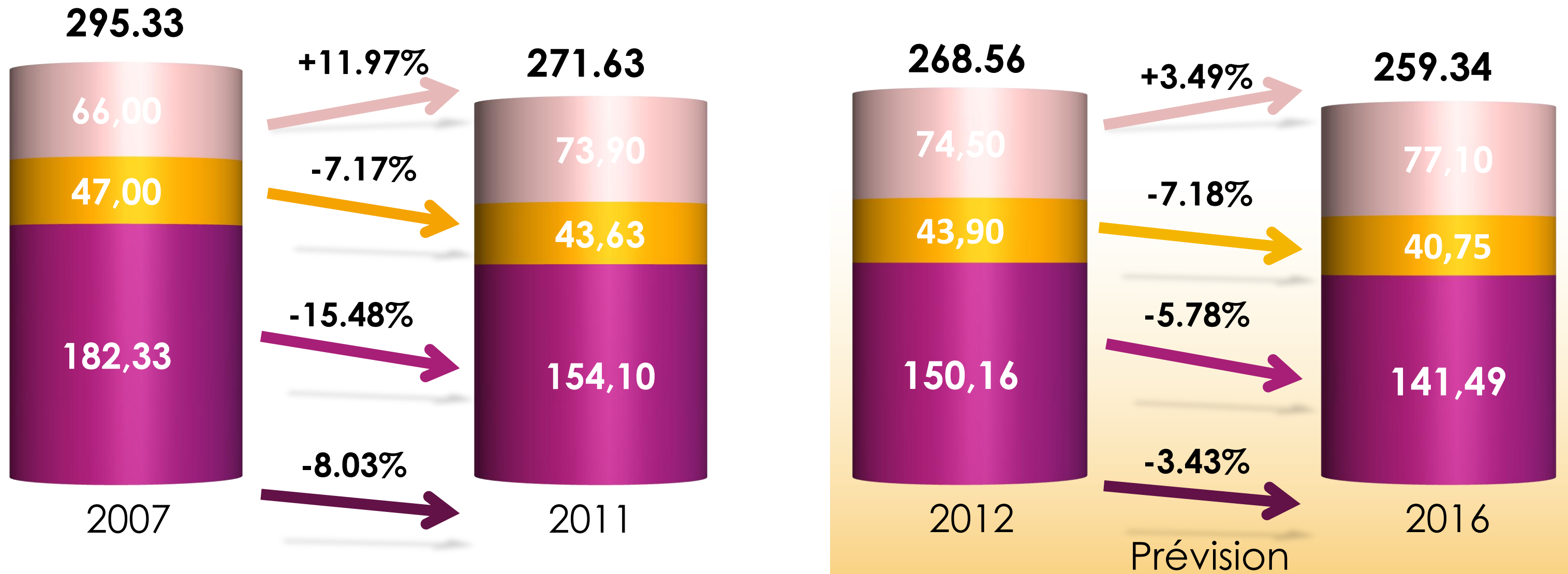
La Consommation de Vin

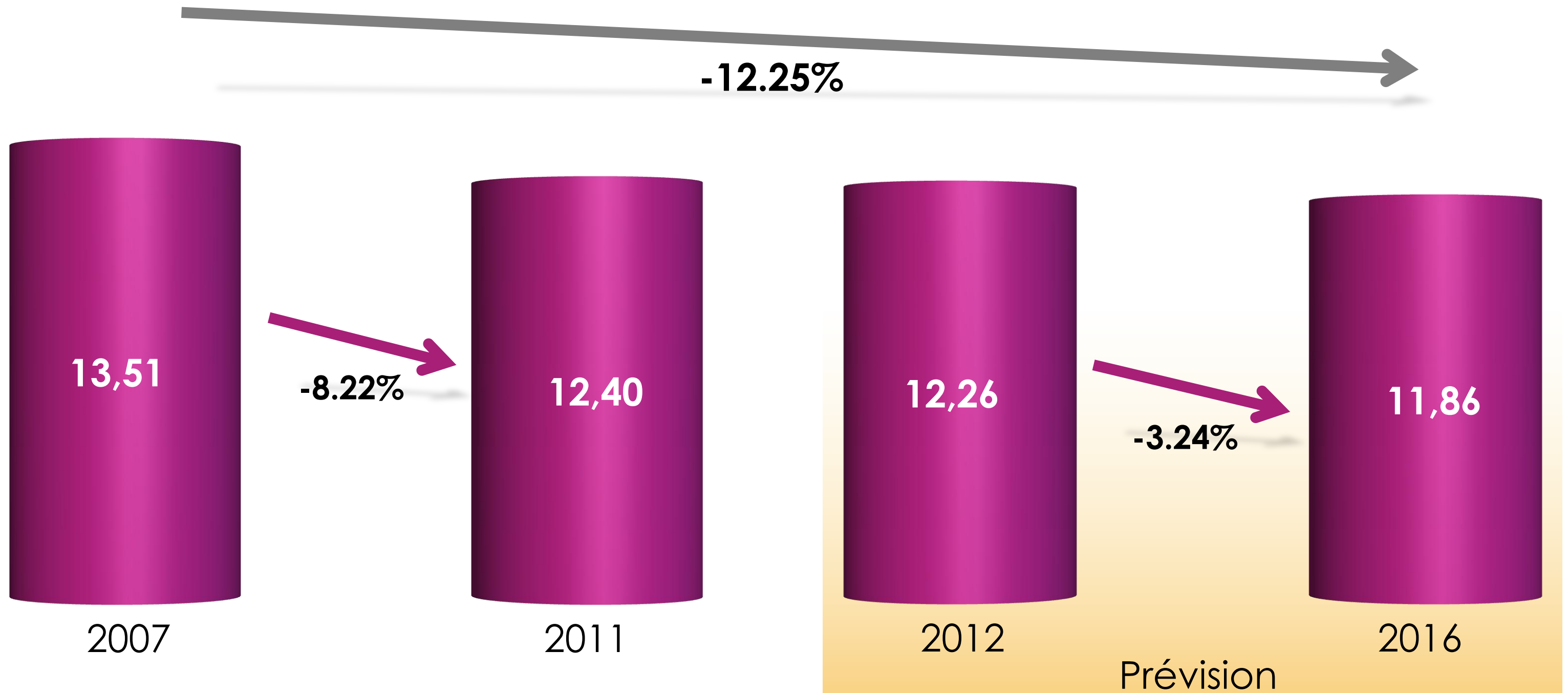




Vins tranquilles

-10.62%

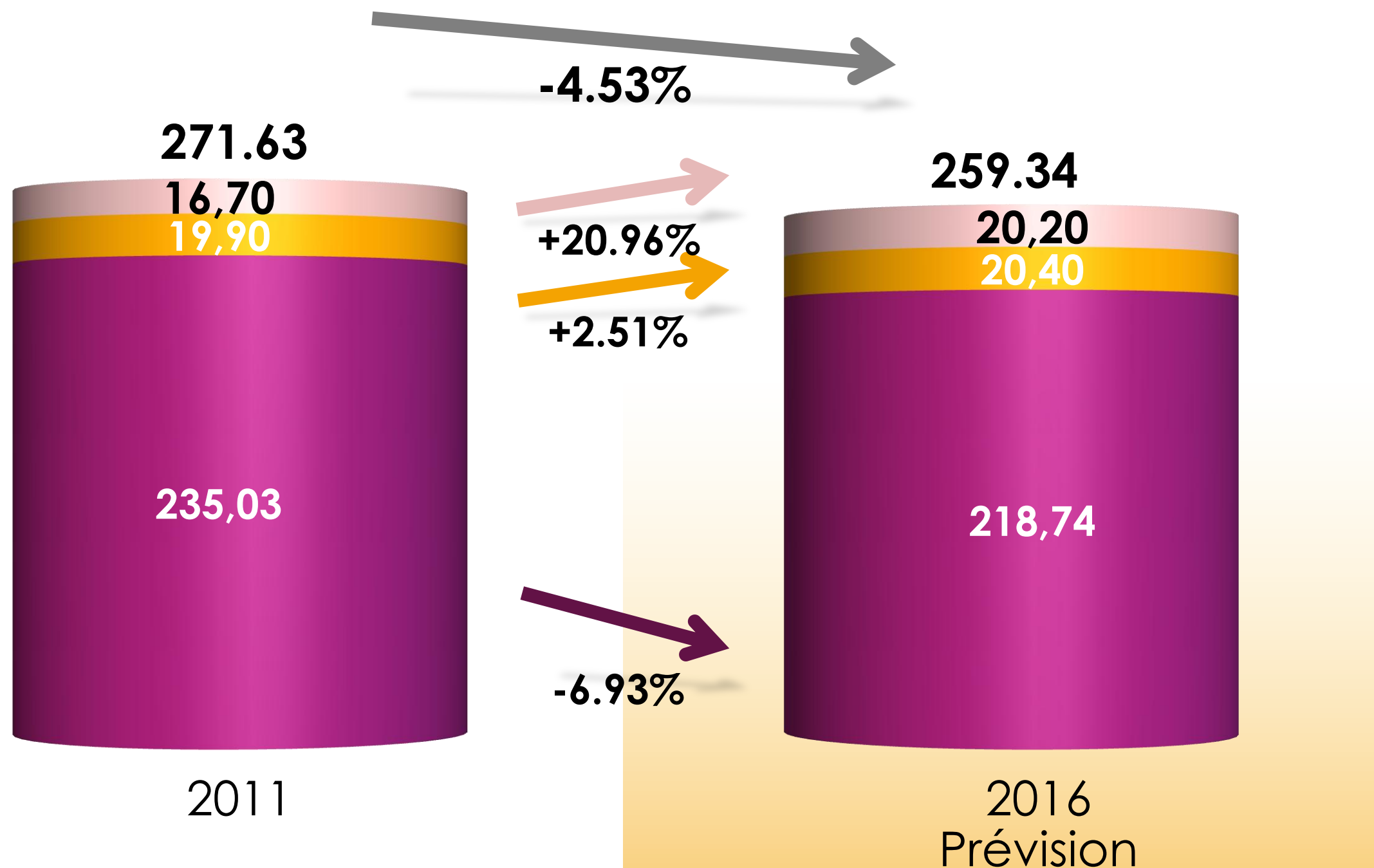




CONSOMMATION DE VIN EN FRANCE

Volume – Millions de caisses de 9L

Taux moyen de change sur 2011 (1USD=0,719€)



Moins de 5 USD*
 Entre 5 et 10 USD*
 Plus de 10 USD*

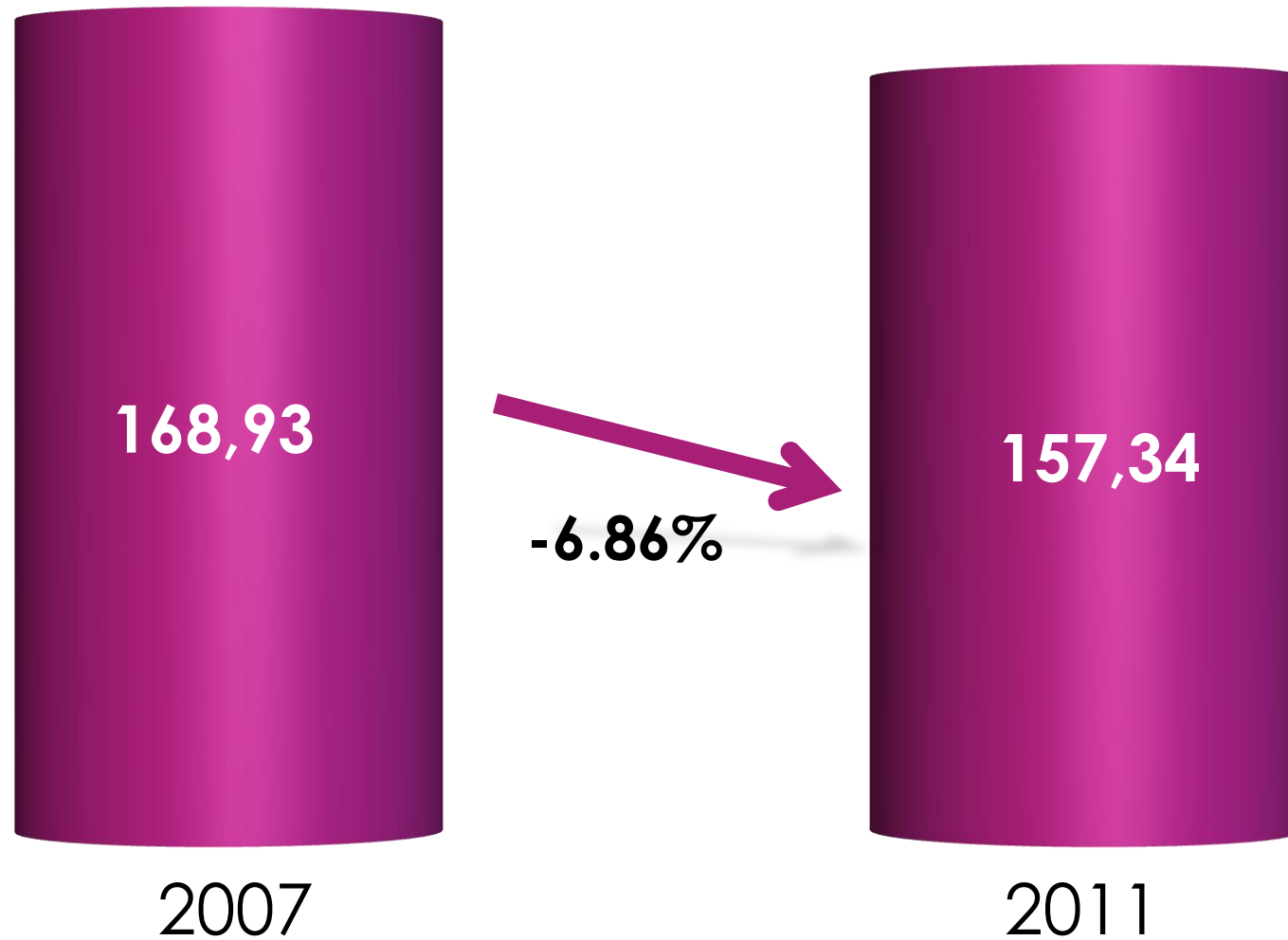
* ventes TTC au stade de la distribution

EXPORTATIONS DE VINS FRANCAIS

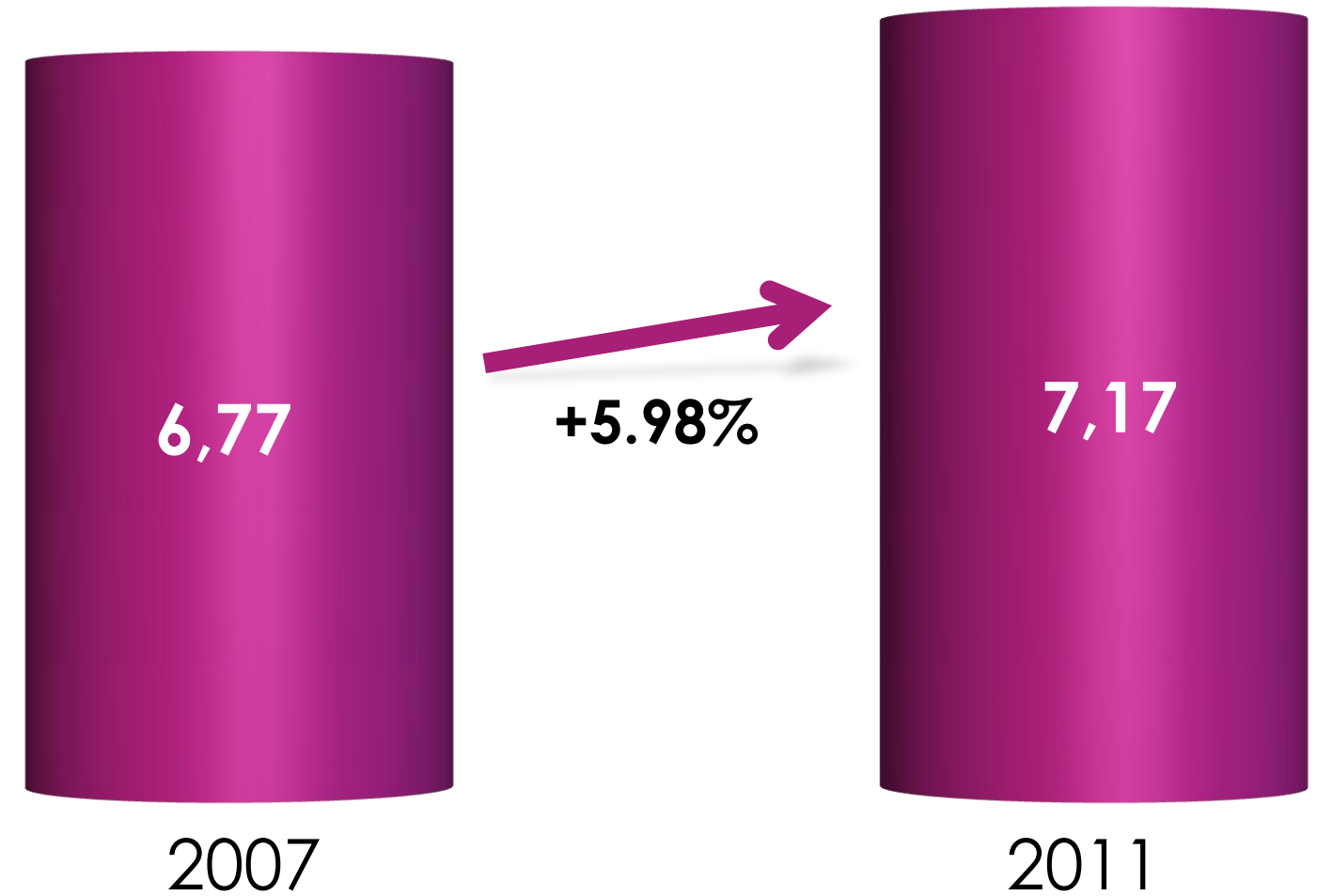
Volume – Millions de caisses de 9L
Valeur – Milliards d'Euros

Vins tranquilles et effervescents

Volume



Valeur



PRINCIPAUX CLIENTS DES VINS FRANÇAIS

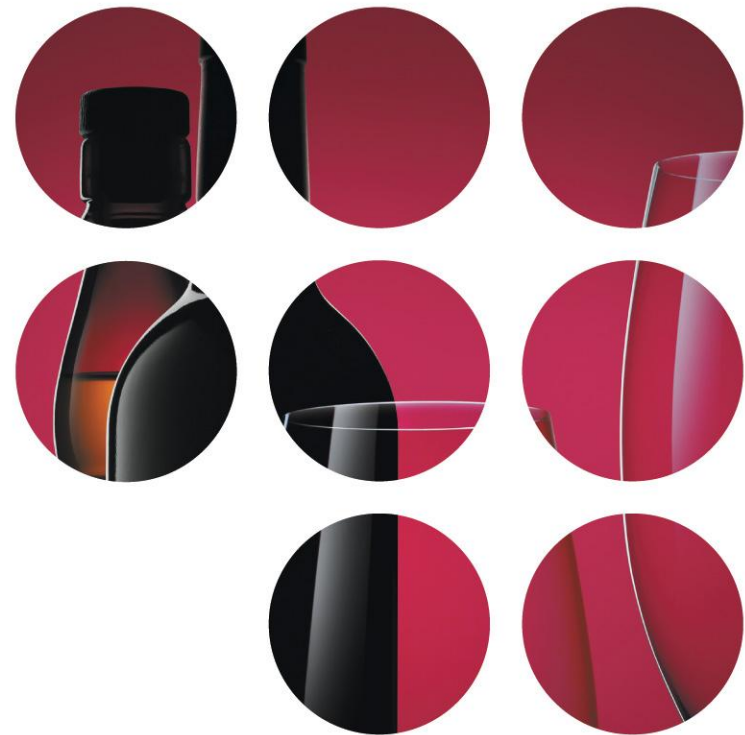
Volume – Millions de caisses de 9L

Vins tranquilles et effervescents

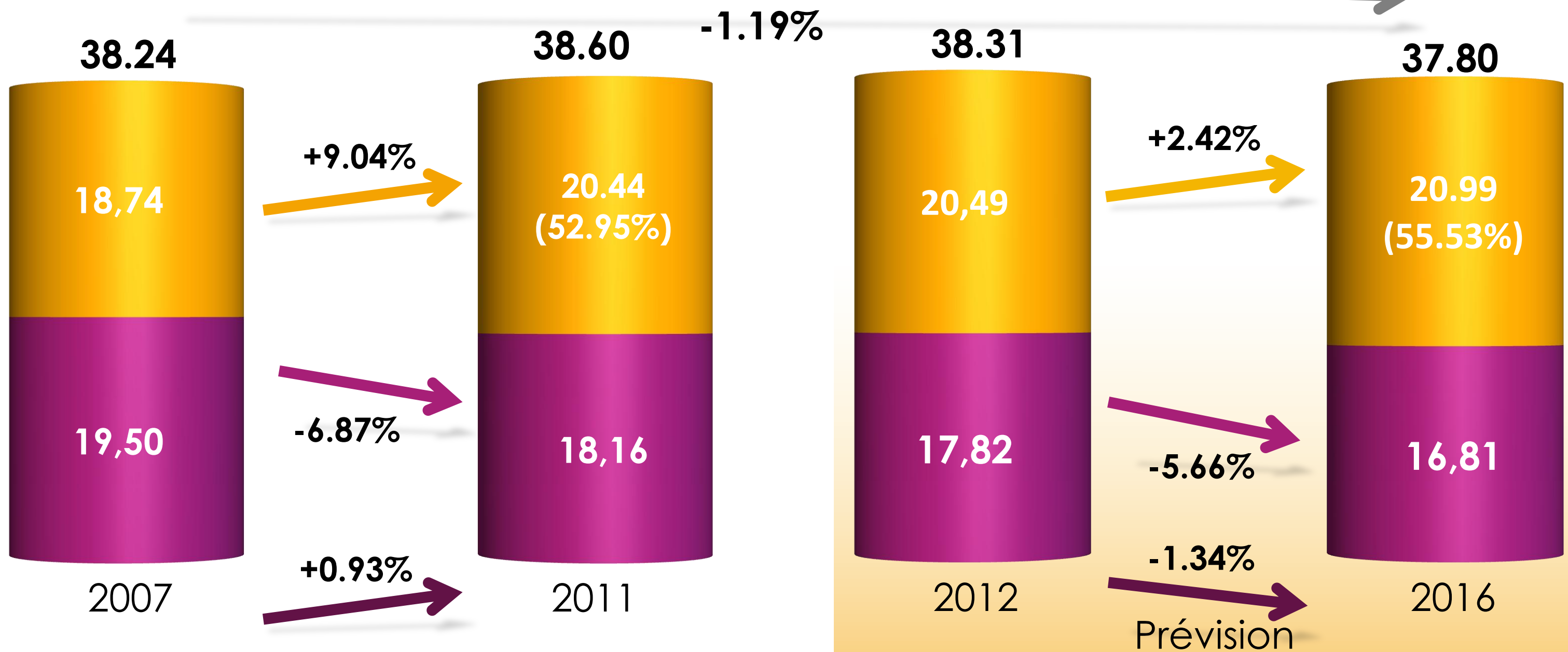
Pays	2007	2011	Evol 07/11
Allemagne	28.83	28.78	-0.19%
Royaume-Uni	33.40	23.95	-28.30%
Belgique/Lux.	20.65	16.68	-19.20%
Chine (Incl. HK)	2.26	13.75	508.32%
Pays-Bas	14.72	12.33	-16.22%
USA	12.01	11.24	-6.49%
Canada	6.51	7.34	12.87%



VINEXPO
2013
BORDEAUX
16-20 JUIN/JUNE



Le marché des **Spiritueux** en **France**



Catégorie	2007	2011	Evol 07/11	2012	2016	Evol 12/16
Scotch Whisky	12.73	14.03	10.17%	14.06	14.53	3.35%
Spiritueux "nationaux"	14.52	13.02	-10.34%	12.70	11.62	-8.50%
Liqueurs	4.24	3.74	-11.76%	3.68	3.44	-6.52%
Rhum	2.77	3.01	8.39%	2.95	2.95	0.12%
Vodka	1.99	2.91	46.83%	3.02	3.52	16.56%
Bourbon	0.56	0.68	22.72%	0.72	0.78	9.27%
Gin	0.60	0.50	-16.52%	0.49	0.46	-6.13%
Cognac/Armagnac	0.57	0.45	-20.07%	0.44	0.41	-7.68%
Tequila	0.18	0.19	4.92%	0.19	0.19	4.99%
Brandies	0.10	0.07	-26.45%	0.07	0.07	-4.27%
TOTAL	38.24	38.60	0.93%	38.31	37.89	-1.34%