

# Statistical and Economic Data on Global and Heroic viticulture

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**Dr. Alexandre Mondoux**

Professor of Economics in Changins



# Introduction

Global viticulture is undergoing structural and economic transformation

- Climate change, market concentration, globalisation, shifting demand

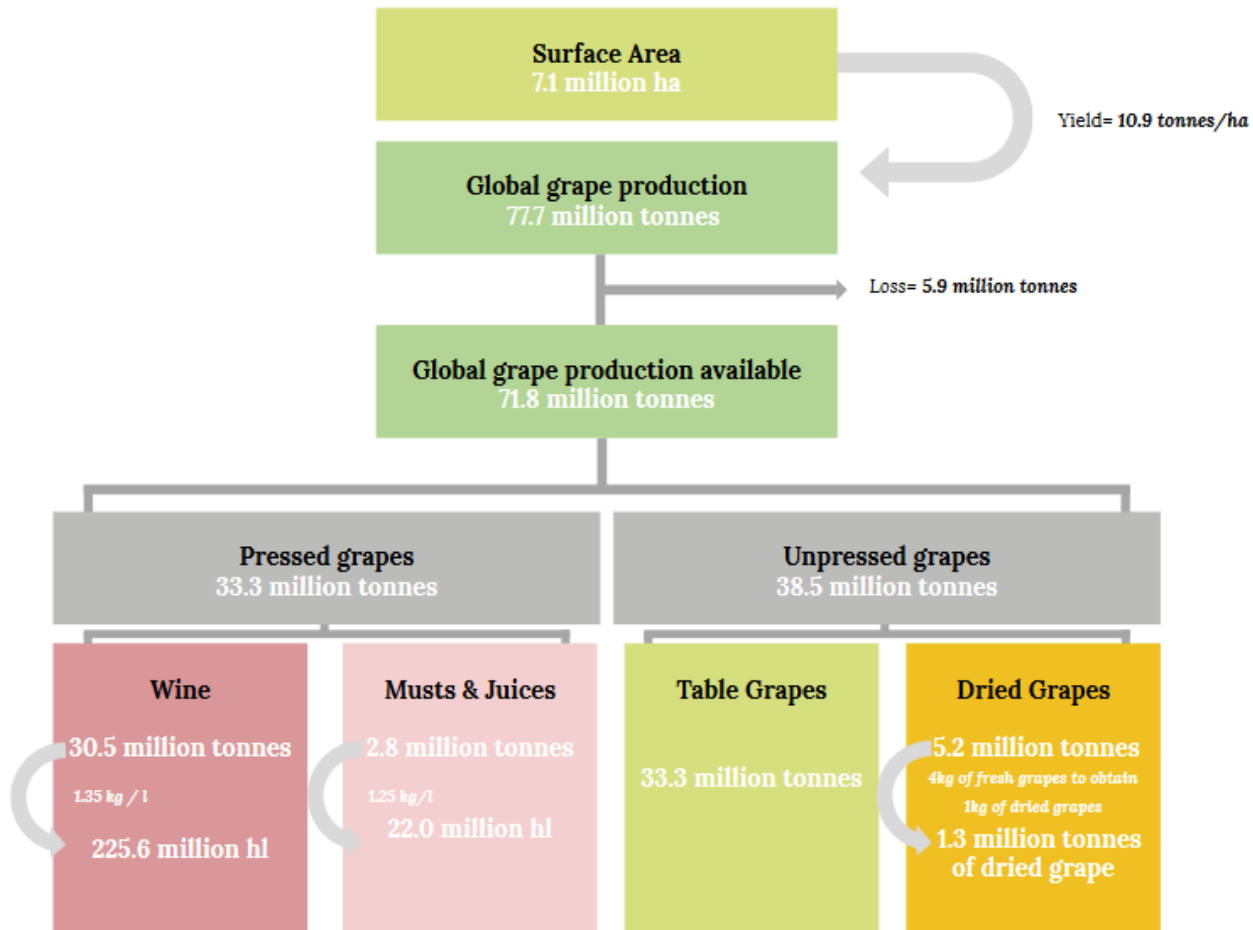
Heroic viticulture: extreme slopes (slope  $> 30\%$ ), terraces, high altitudes => Represents about 40% of the Swiss vineyard surface

Objective: statistical and economic assessment

- World wine market (OIV)
- Swiss wine market (FOAG and OSMV)
- Economic aspects of Heroic viticulture

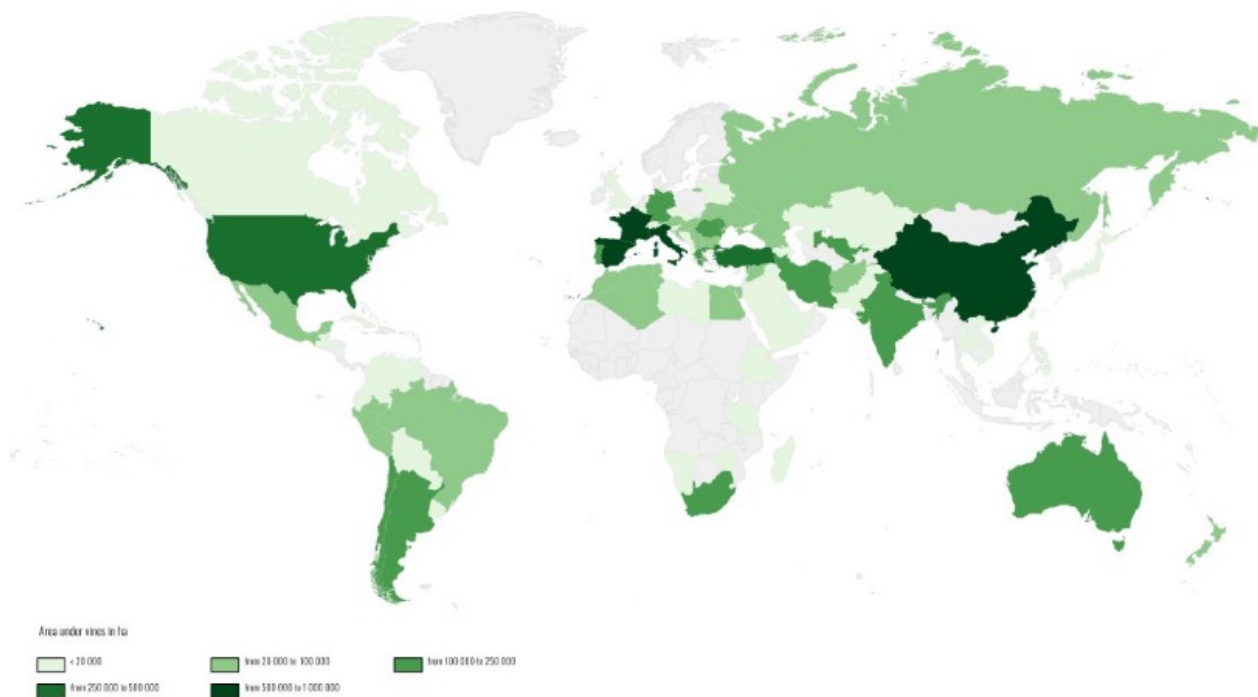
# Global grape balance sheet 2024 (OIV)

## Global grape balance sheet 2024



# World vineyard distribution in 2022 (OIV)

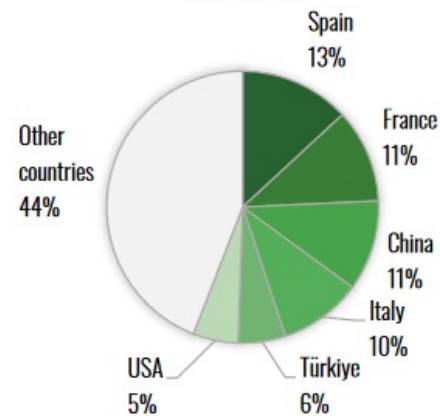
World vineyard distribution in 2022



© OIV

In 2022 there are **93 vine growing countries** at world level. **Top 6 countries** represent **56 %** of the world vineyard surface area.

Breakdown of vineyard surface area in 2022



**OIV**

# Evolution of world vineyard surface area in 2024 (OIV)



Grape for all uses

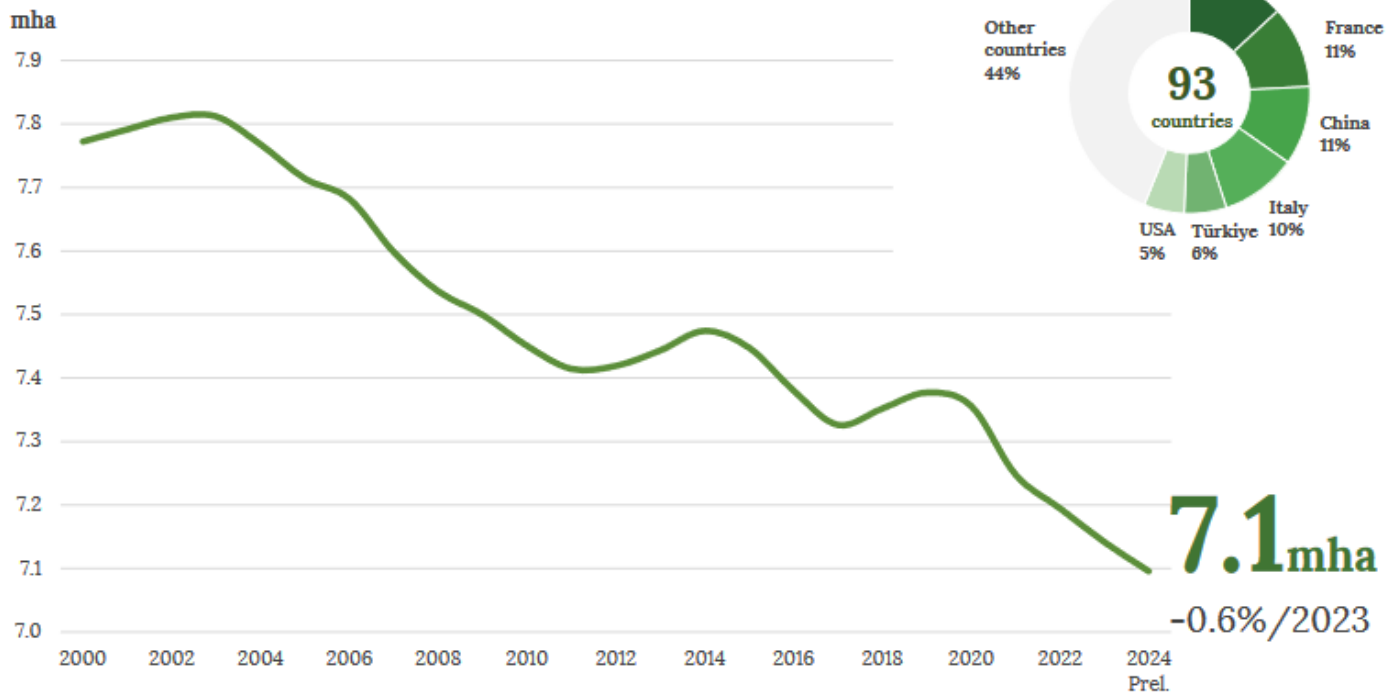


9% drop since 2000



EU = 46%  
SH = 12%

### Evolution of world vineyard surface area



# Evolution of world wine production in 2024 (OIV) – Supply side (I)



Lowest since 1961

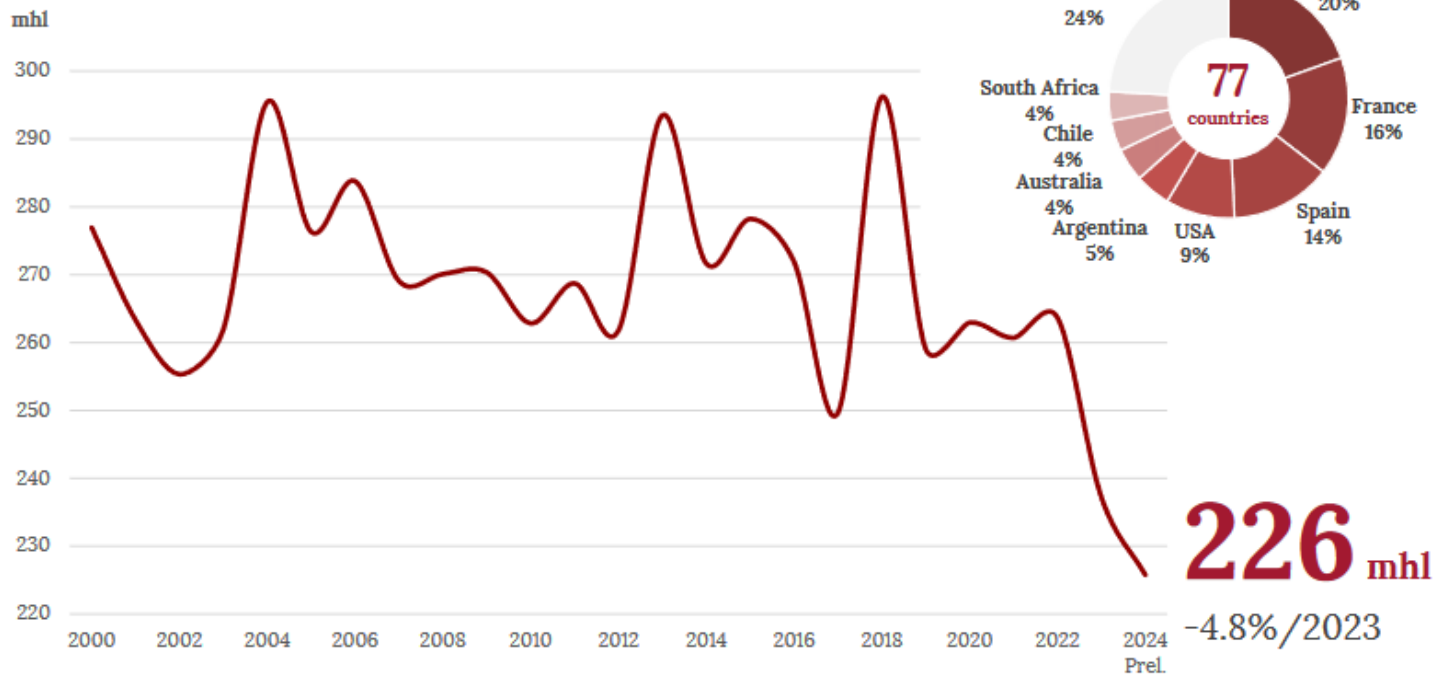


Atypical meteorological events



EU = 61%  
SH = 20%

Evolution of world wine production

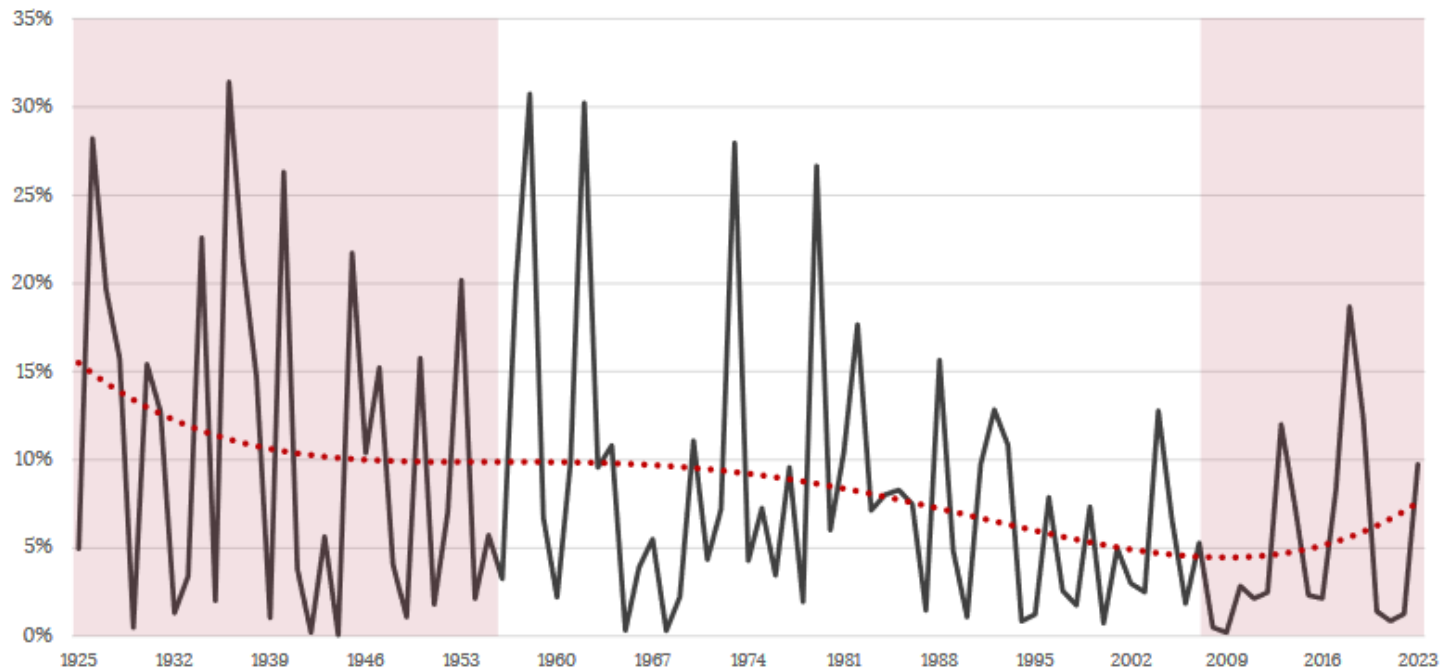


# Evolution of world wine production in 2024 (OIV) – Supply side (II)

## Wine Production

Wine production refers to the production of wine excluding musts and juices

Volatility Indicator (y-o-y variation)



Continuous Fluctuation



Tech Development



Climate change

# Evolution of world wine consumption in 2024 (OIV) – Demand side : $C = Si - Sf + P + M - X$



Lowest since 1961

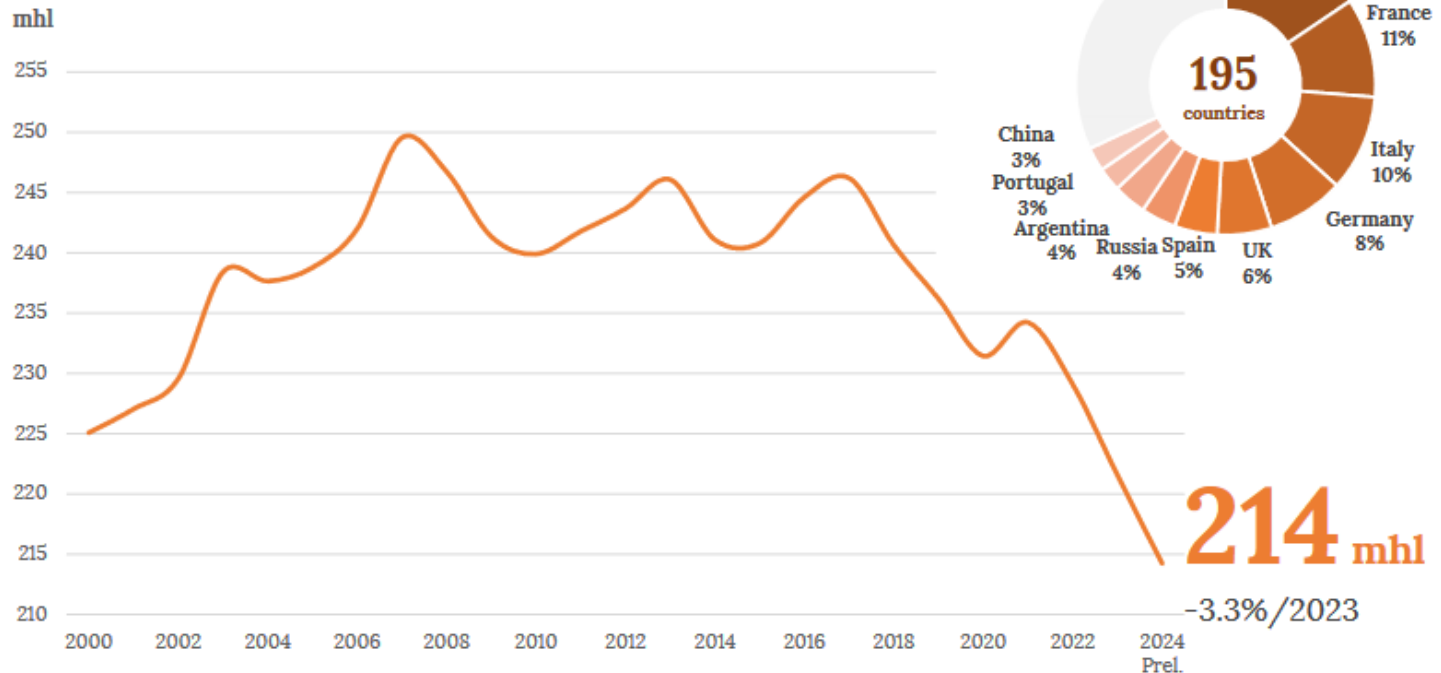


Inflationary pressures



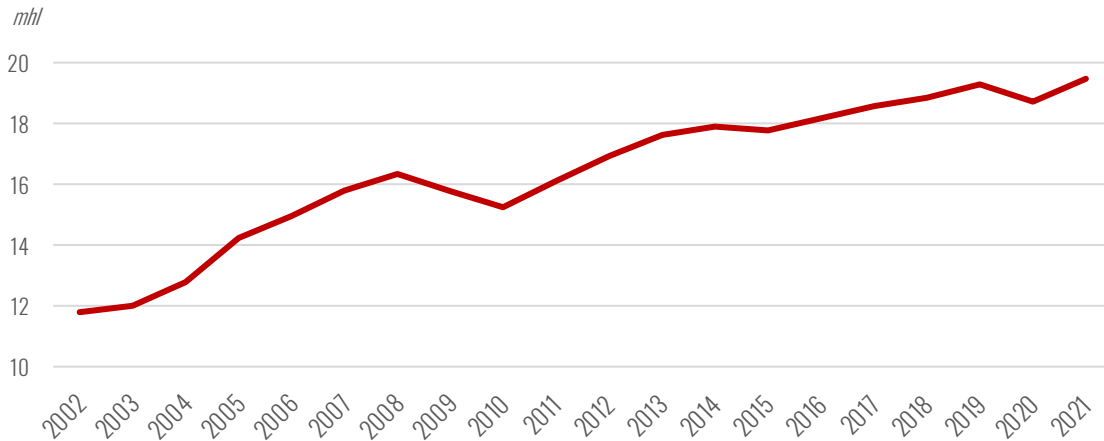
EU = 48%

Evolution of world wine consumption



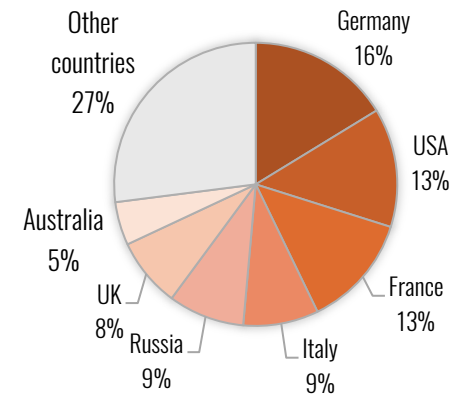
# Evolution of world consumption of sparkling wine (OIV)

Evolution of world consumption of sparkling wine



**19.5 mhl**  
+65% / 2002

Breakdown of sparkling wine consumption in 2021

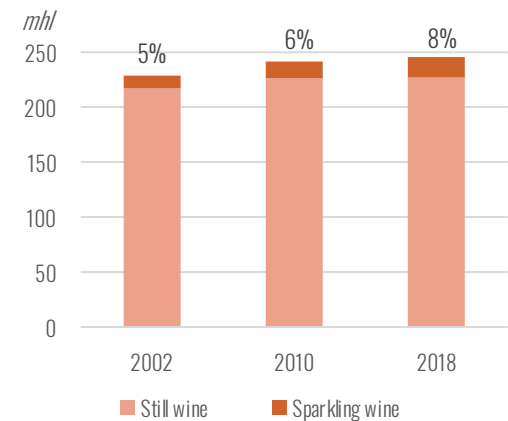


In 2021 global sparkling wine consumption reached 19.5 mhl, +65% since 2002.

In terms of the relative weight of sparkling wines in overall wine consumption, while in 2002 it was at 5%, in 2018 sparkling wines represent about **8% of total wine consumption**.

In 2021, seven countries - **Germany, USA, France, Italy, Russia, UK, and Australia** – represent **73%** of global sparkling wine consumption.

Share of sparkling wine in world wine consumption



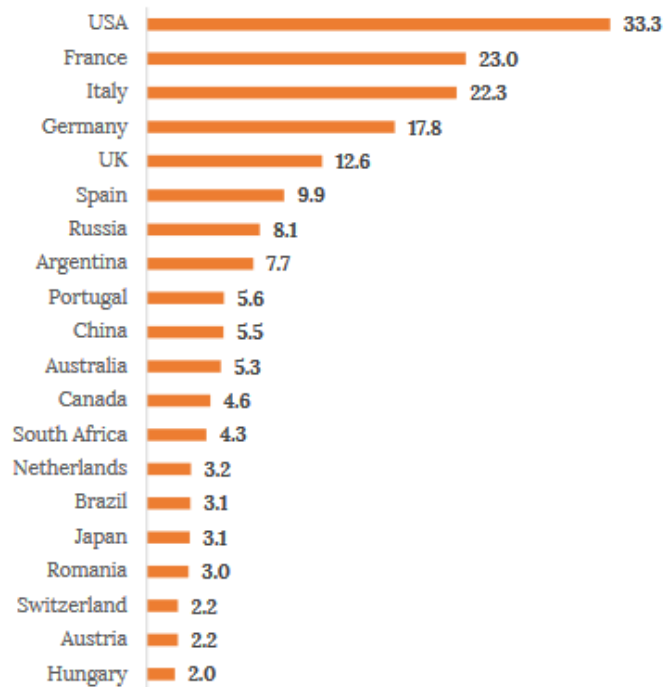
# Ranking of world wine consumption per country in 2024 (OIV)

## Wine Consumption

Wine consumption refers to the consumption of wine, including still, sparkling, and special wines

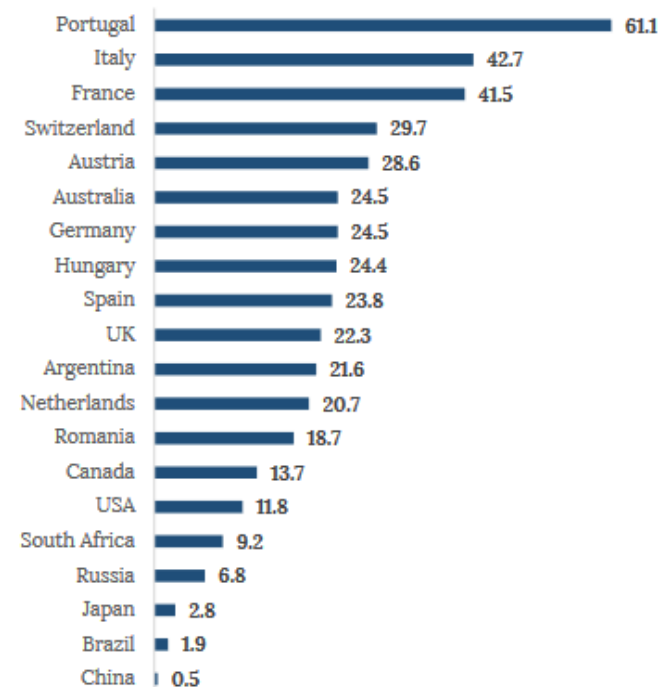
Major countries\* by total consumption in 2024

mhl



Consumption per capita 15+ in major consuming countries\* in 2024

l/ capita

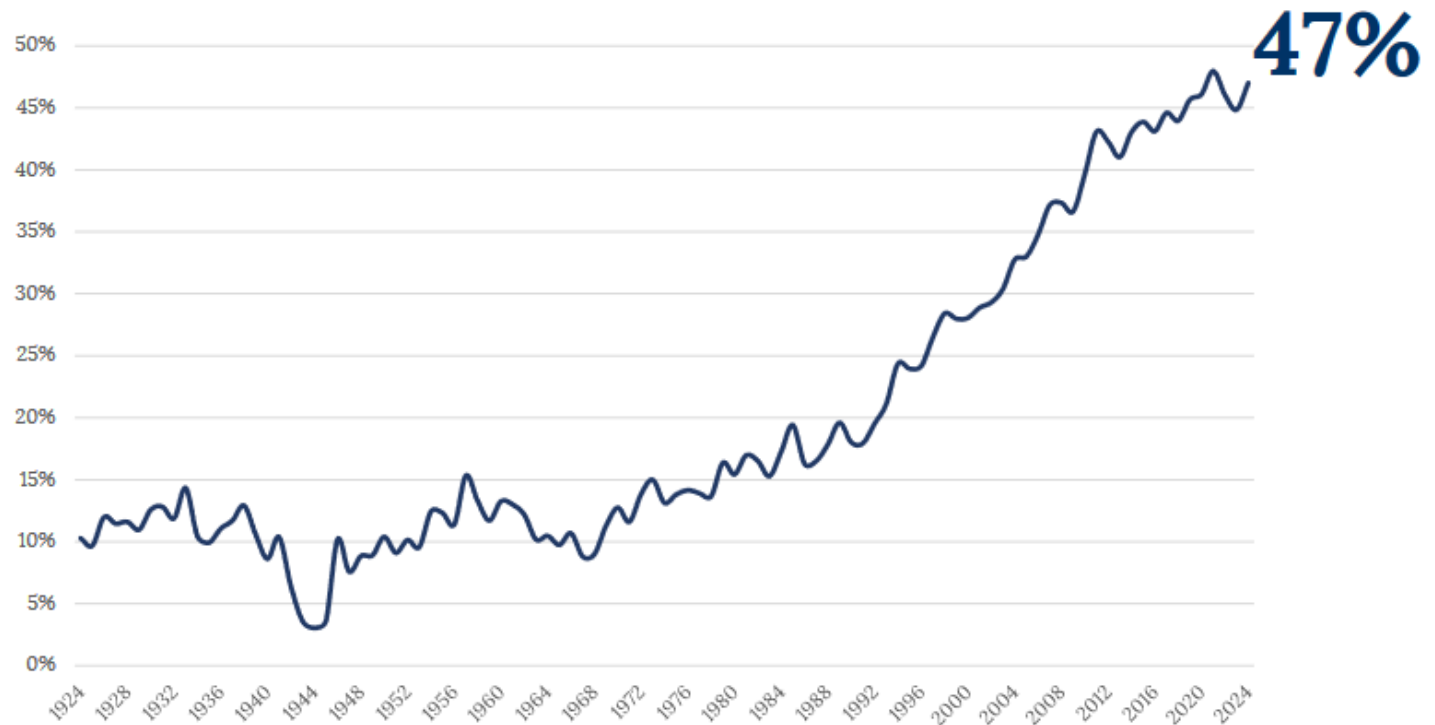


\*Countries with 2024 wine consumption above 2 mhl

Wine market internationalization index = Ratio of imported volume / global consumption (OIV)

## Market Internationalisation Index

the percentage of wine consumption that comes from imports



+ 30% pts since 1990



47% of wine consumed is imported



Highly globalised sector

# Evolution of world average export price in 2024 (OIV)



2nd highest recorded



Inflationary pressures

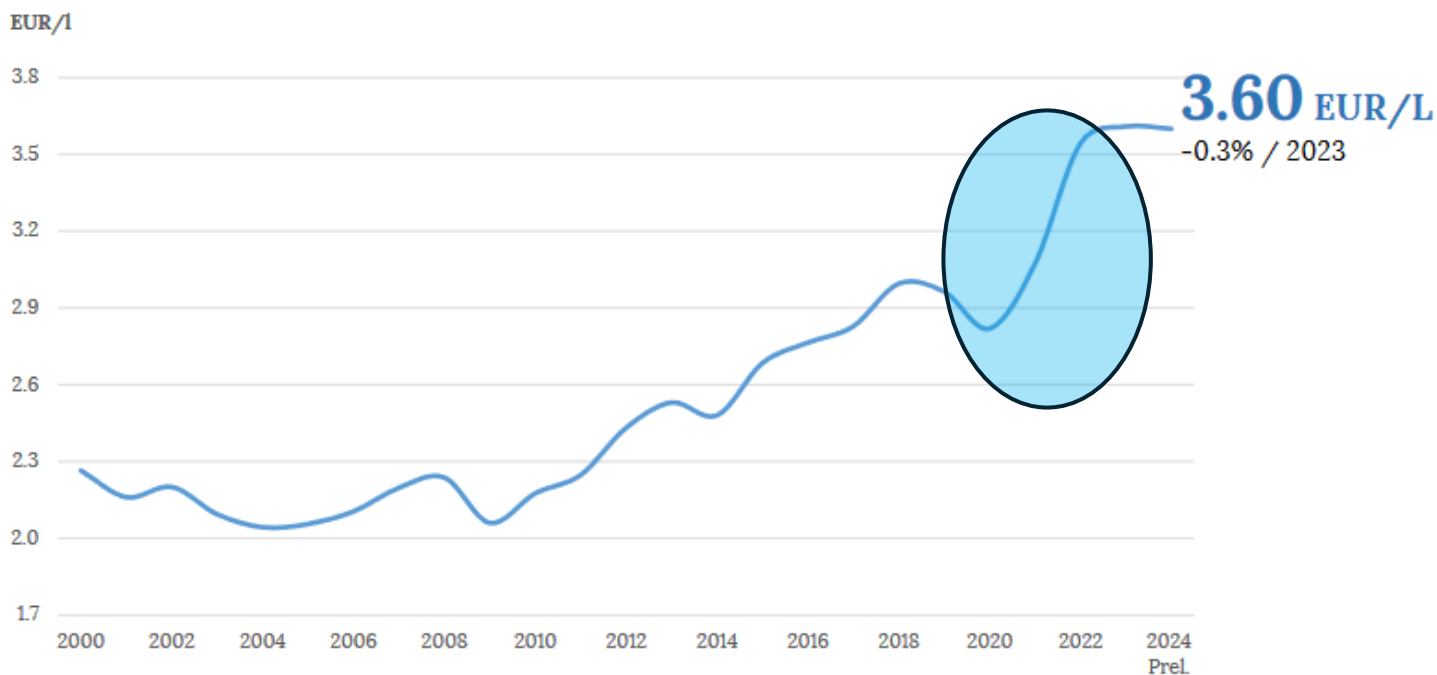


+30% / 2020

## International Trade in Wine

International trade of wine refers to import/export of wine(HS code 2204)

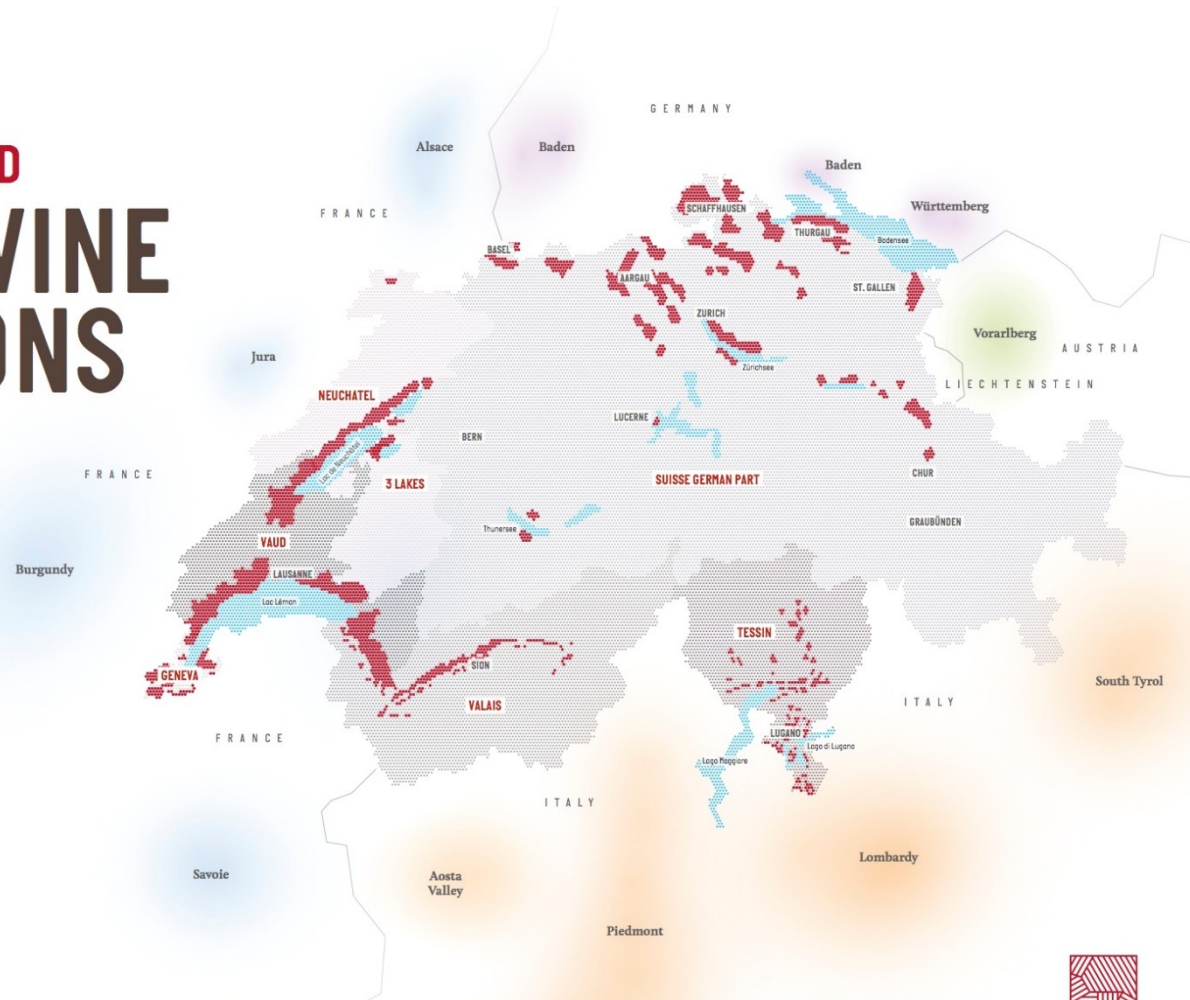
Evolution of world average export price



# The six Swiss wine regions

## SWITZERLAND THE WINE REGIONS

<b>VALAIS</b>	5'000 Hectares
<b>VAUD</b>	3'750 Hectares
<b>SWISS GERMAN PART</b>	2'650 Hectares
<b>GENEVA</b>	1'450 Hectares
<b>TESSIN</b>	1'050 Hectares
<b>NEUCHÂTEL - 3 LAKES</b>	1'000 Hectares
<b>SWITZERLAND</b>	<b>14'900 Hectares</b>



[WWW.SWISSWINE.CH](http://WWW.SWISSWINE.CH)

Switzerland. Naturally.



SWISS WINE

# FOAG report (wine year)

- Quantities
- Calculated consumption:  $C = Si - Sf + P + (M - X)$
- All distribution channels combined

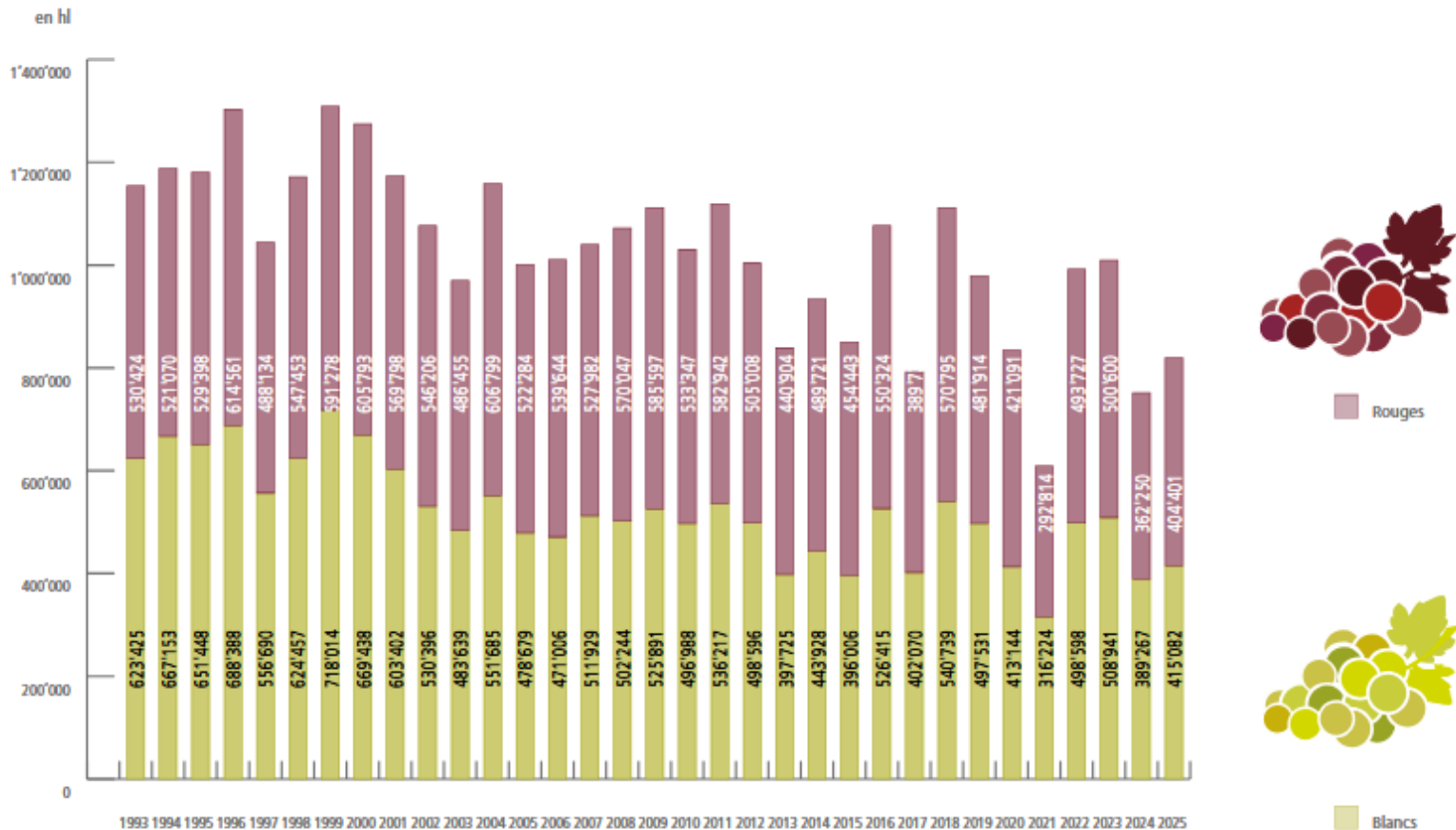


# OSMV Report (Swiss wine market)

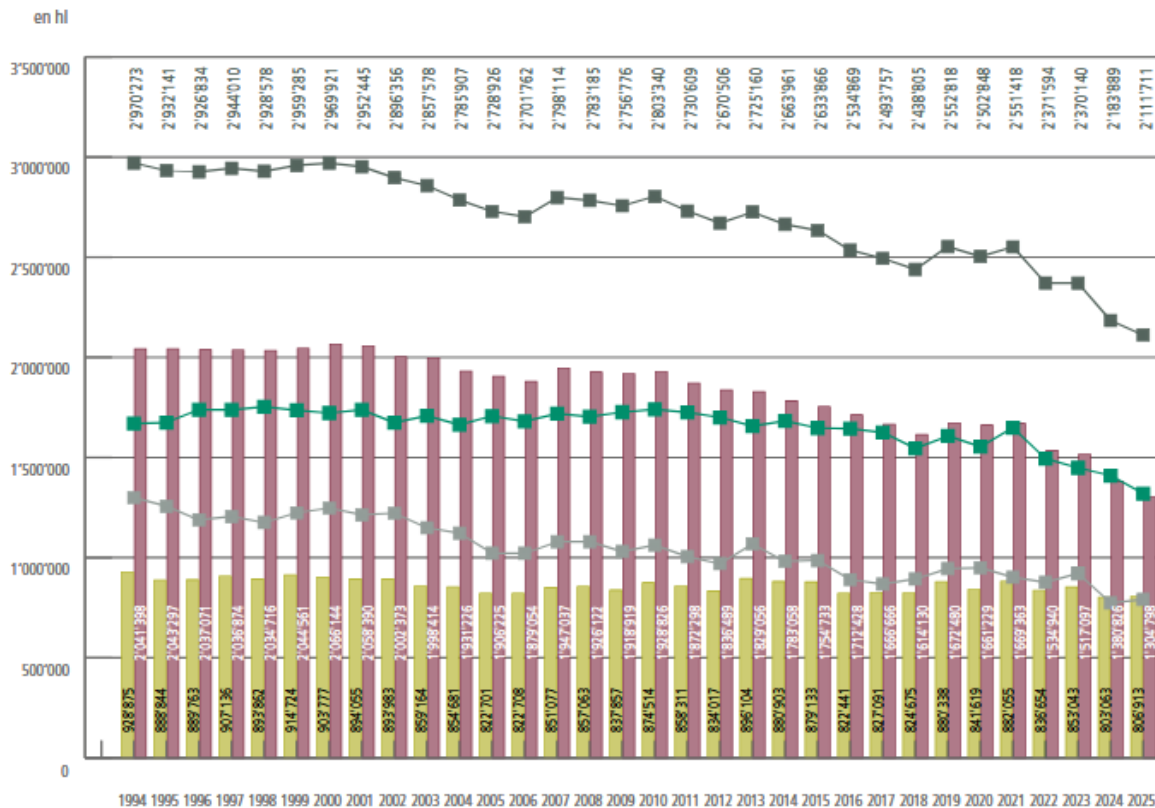
- Quantities and prices
- Average quantities and prices paid at the cashier
- **Retail market** (COOP, Denner, Globus, Manor, Migros, Volg, Spar and Landi)



# Wine production in Switzerland (FOAG, 2025)



# Wine consumption in Switzerland (FOAG, 2025)



- Market share of Swiss wines (2025) = 37.5%
- Cons. TOT : -3.3%
- Cons. CH : +2.3%
- Cons. For. : -6.4%

■ Consommation blanc et rouge  
■ dont vin étranger  
■ dont vin suisse



# Evolution of sales and prices of Swiss wines (AOC and VdP) 2019-2025

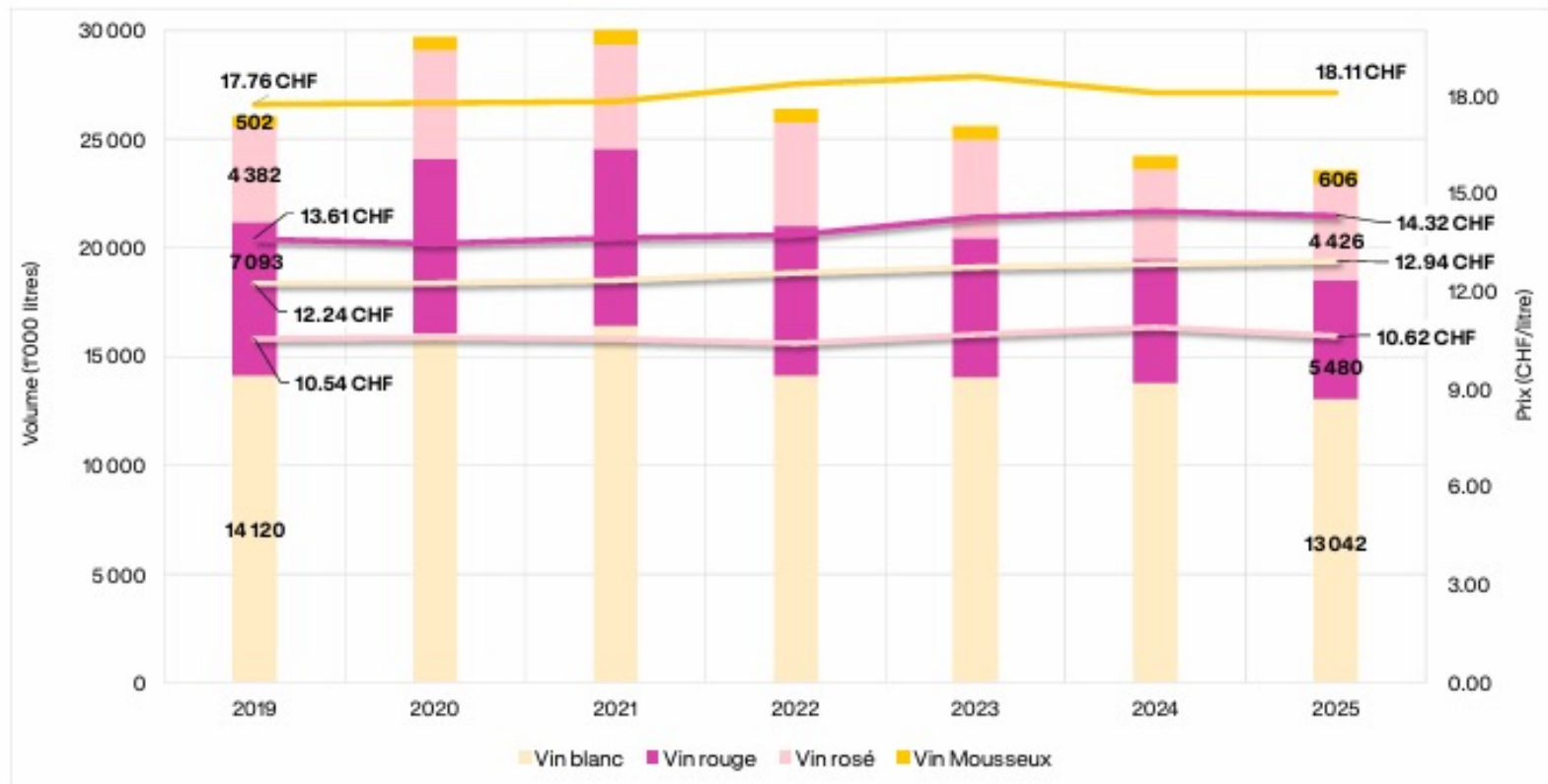
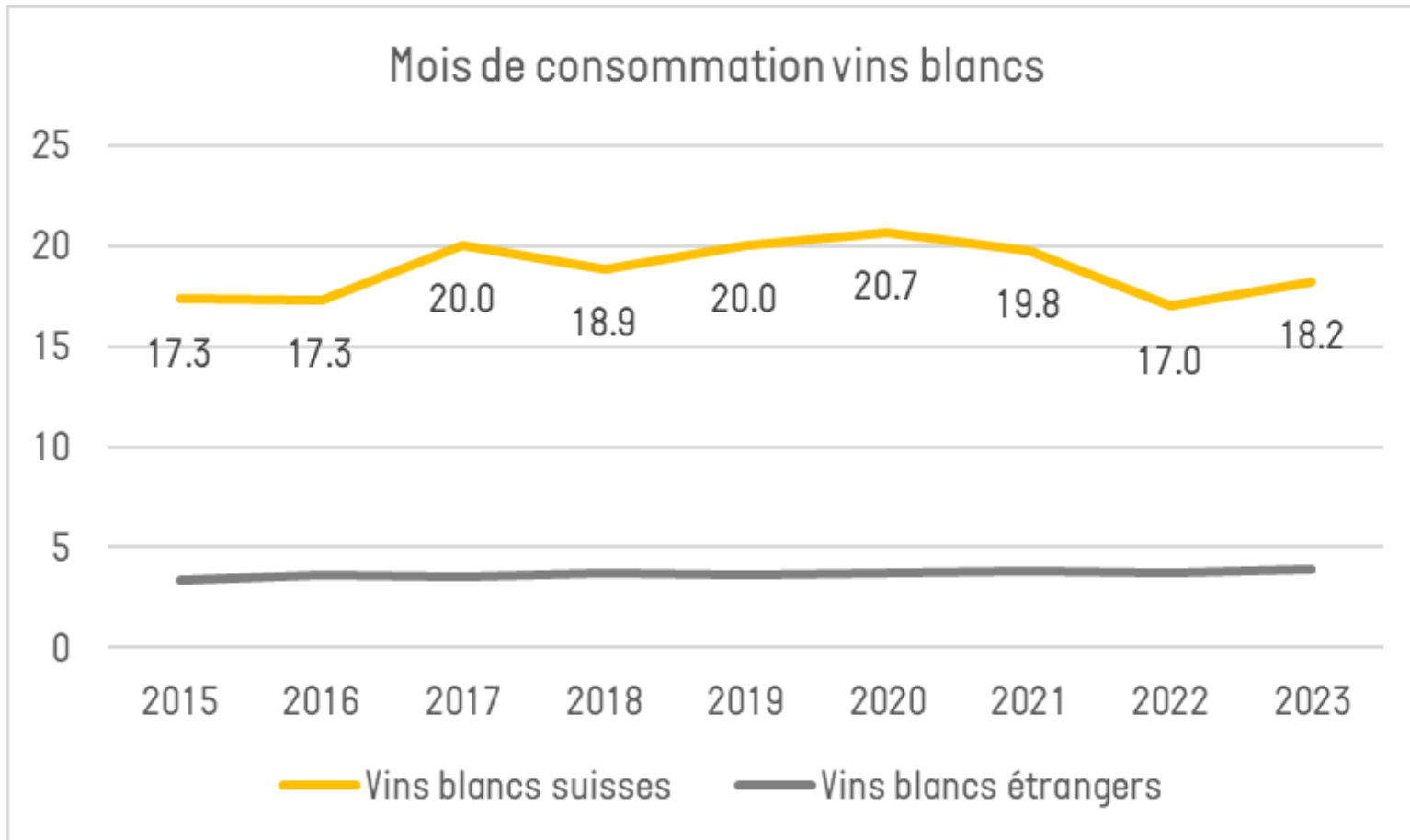
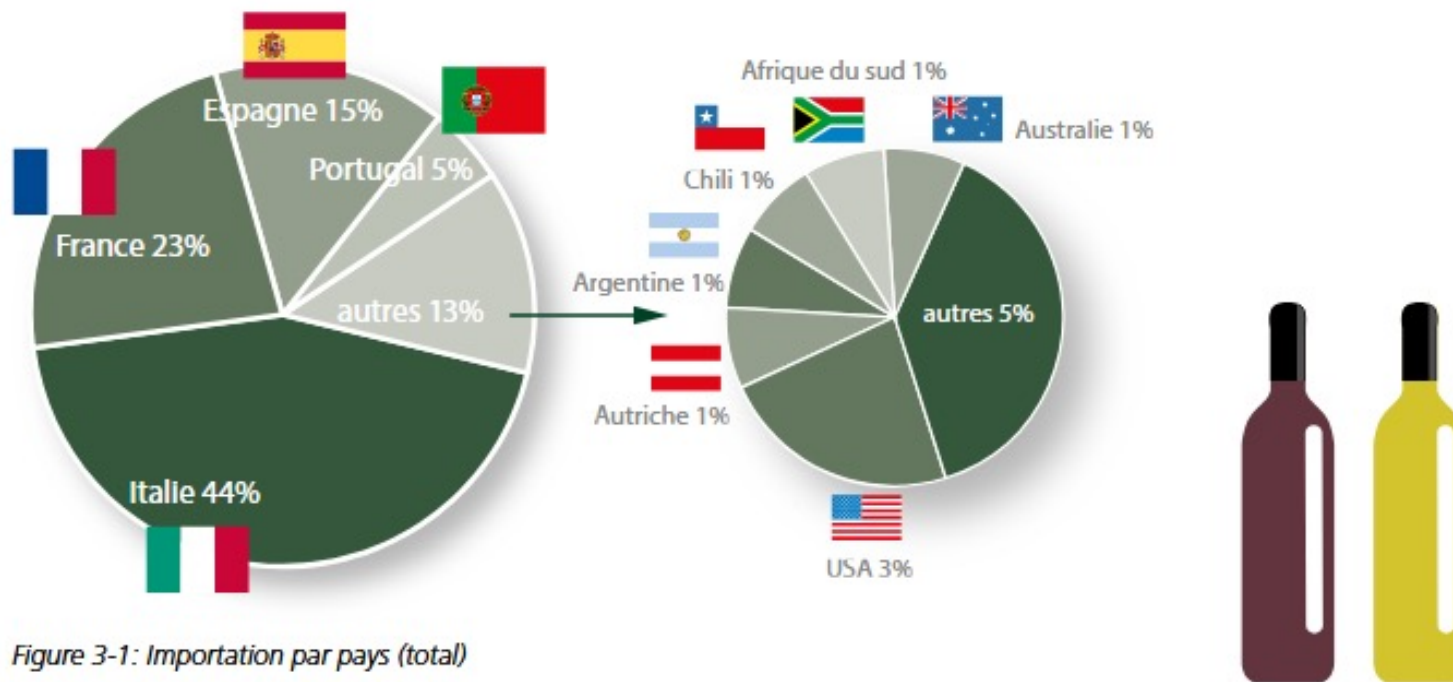


Fig. 3 Données de vente 2019-2025 : Coop, Denner, Globus (2019-2020), Manor, Migros, Volg, Spar, Müller (2023-2025) et Landi (2019-2025)

# Months of consumption for white wines ( $MoC = Si/C * 12$ ) - FOAG

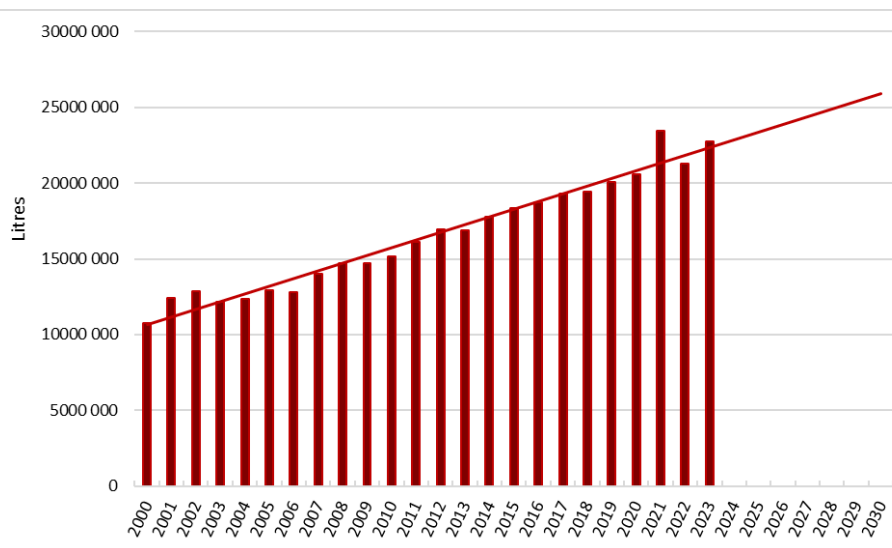


# Import and export market share by volume all colors combined in 2025 (FOAG, 2025)

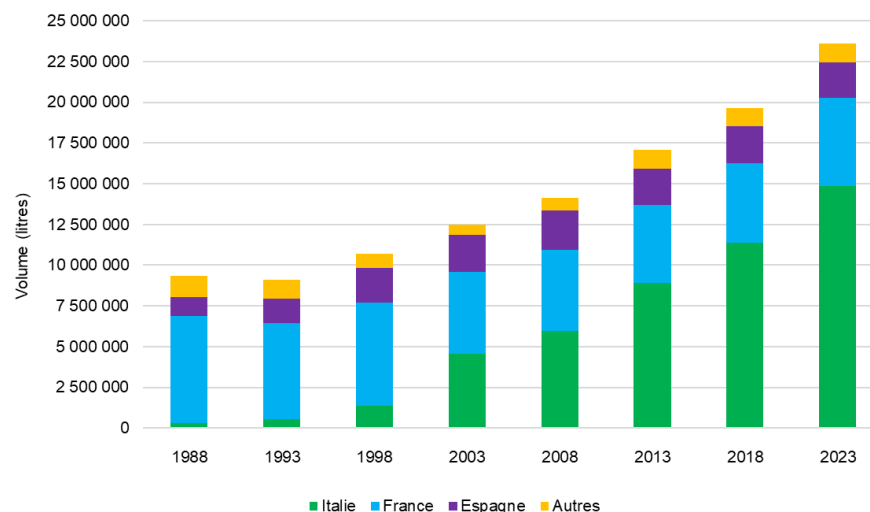


**Wine exports from Switzerland** represent **1.3%** of Swiss wine production in 2025 (re-exportation included). This figure drops to around **0.5%** if we consider only **Swiss wine exports**.

# State of the Swiss sparkling wine and NoLo market (FOAG and OSMV)



Evolution and linear projection of the consumption of imported sparkling wines in Switzerland (2000–2030). FOAG consumption data (2000–2023)



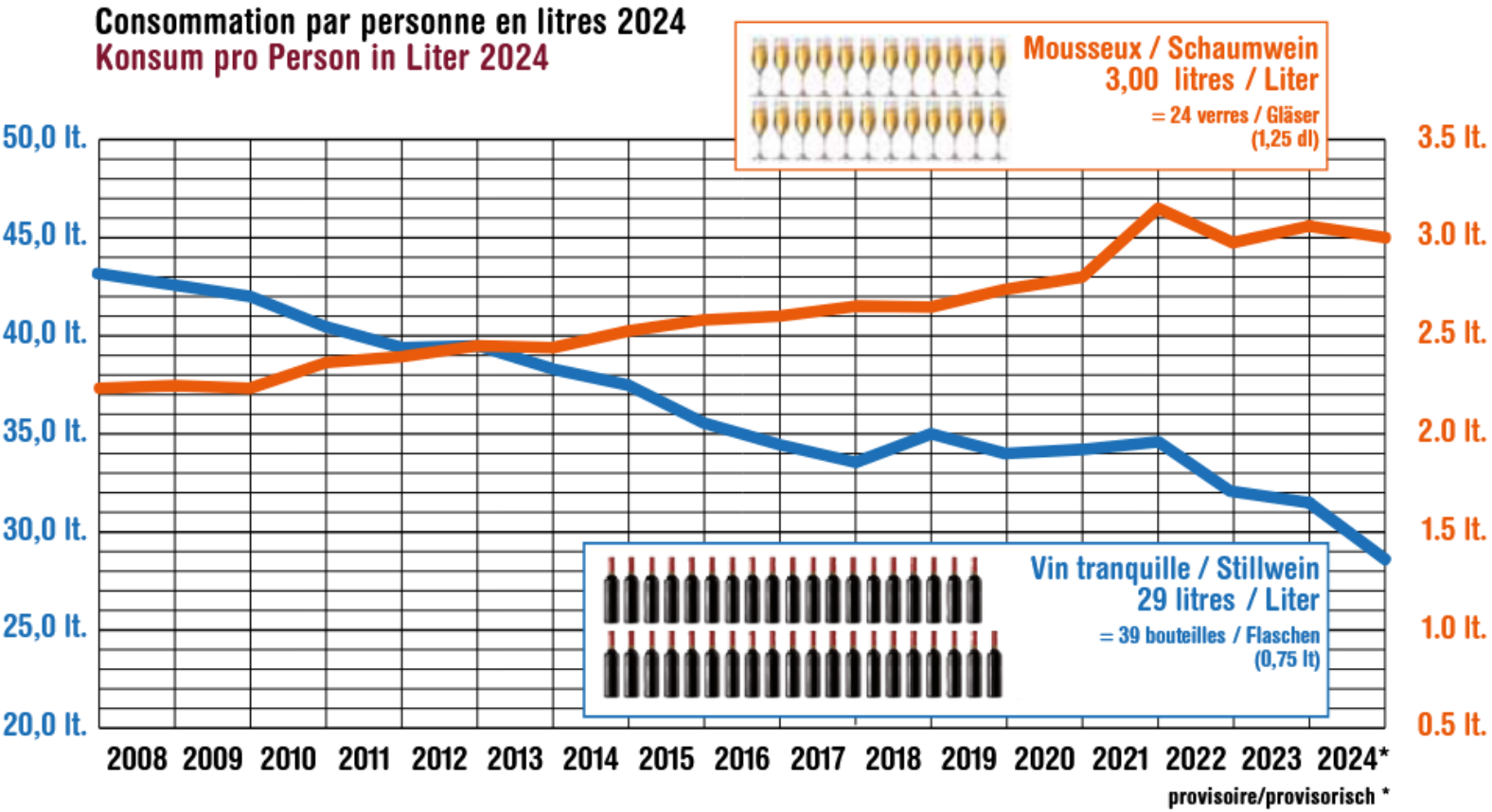
Evolution of import volumes of sparkling wines by exporting country (Swissimpex 1988-2023)

		Vente en grande distribution				Variation	
		2019	2021	2022	2023	2022-2023	
Cocktails à base vins mousseux	Volume <sup>1</sup>	979	1 051	1 003	1 067	▲	6.4%
	Prix <sup>2</sup>	8.49	9.47	9.93	9.52	▼	-4.1%
Vins mousseux sans alcool	Volume	1 530	1 777	1 738	1 787	▲	2.8%
	Prix	6.55	6.51	6.77	7.19	▲	6.3%
Hard seltzer <sup>3</sup>	Volume <sup>1</sup>	0	230	277	214	▼	-22.7%
	Prix <sup>2</sup>	0.00	8.30	8.44	8.86	▲	4.9%
Vins désalcoolisés	Volume	23	83	150	198	▲	31.8%
	Prix	11.11	12.65	13.45	12.65	▼	-6.0%
Total	Volume	2 532	3 141	3 169	3 266	▲	3.1%
	Prix	7.34	7.80	8.23	8.39	▲	2.0%

<sup>1</sup>En milliers de litres <sup>2</sup>En CHF/litres <sup>3</sup>À partir de 2020



# Swiss wine consumption per capita in 2024 (ASCV)



# Economic dimension of sustainability for Heroic viticulture

Heroic viticulture, practiced in extreme conditions such as steep slopes or terraces, presents a unique sustainability profile across three dimensions:

- **Economically**, it is costly and labor-intensive, with limited mechanization and lower productivity. Its viability depends on premium pricing, strong product identity, and often external support.
- **Environmentally**, it offers significant benefits, including biodiversity preservation and soil conservation, although it remains vulnerable to climate change and requires ongoing maintenance.
- **Socially**, it plays a key role in preserving cultural heritage, sustaining rural communities, and maintaining traditional knowledge, despite challenges such as **labor intensity** and workforce aging.

Overall, its sustainability relies on balancing economic viability, environmental stewardship, and social continuity.

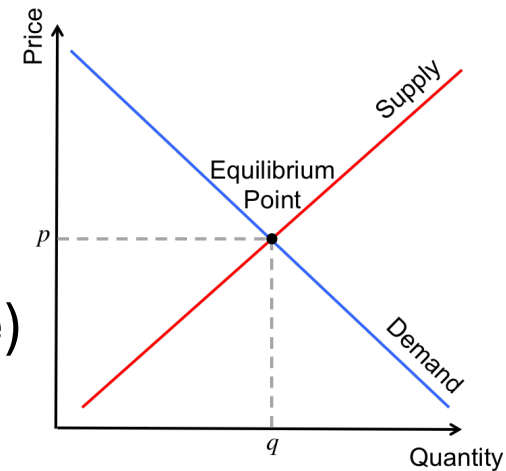
# Economic characteristics of Heroic viticulture

Higher production costs per hectare (**supply side**)

- Lower yields in many cases
- Strong link to geographical identity
- Dependence on labour intensity and availability

Premium pricing and origin labelling (**demand side**)

- Individual (producer) and collective (appellation) reputation
- Monopolistic competition (  $\neq$  perfect competition)
- Wine tourism, landscape value and Sustainability positioning
- Niche market differentiation



# Fine wine pricing in a small and highly competitive market (Masset, Mondoux and Weisskopf, 2022)

- Panel data base from 149 “fine wine” producers and 2454 wine over the six Swiss wine regions
- Methodology: Hedonic regression and DID
- Dependent variable: ln (price)
- Independent variables: Product attributes (varietals), Color, Aging technique, Positioning and labelling, 2015-2018 dummy variables, Parker scores

$$p_{it} = \beta_0 + \sum_{k=1}^K \beta_{1k}x_k + c_i + \delta_t + \beta_2D_{it} + \varepsilon_{it}$$

Variables	3a		Specification 3b		3c	
<i>A. Individual and collective reputation and status</i>						
Reference producer	MDVS producer	0.019 (0.012)	0.019 (0.012)			
Iconic producer	Gault–Millau Icon	0.116*** (0.033)	0.116*** (0.033)			
Region	German-speaking Switzerland	0.008 (0.018)	0.008 (0.018)	0.007	(0.018)	
	Ticino	0.068* (0.039)	0.068* (0.039)	0.071*	(0.039)	
	Three-Lakes	-0.020 (0.018)	-0.020 (0.018)	-0.021	(0.018)	
	Vaud	-0.059*** (0.018)	-0.059*** (0.018)	-0.059***	(0.018)	
	Geneva	-0.300*** (0.017)	-0.300*** (0.017)	-0.298***	(0.017)	
Famous T-V combination	Chasselas_Lavaux	0.196*** (0.028)	0.193*** (0.028)	0.194***	(0.028)	
	Merlot_Ticino	0.175*** (0.026)	0.172*** (0.026)	0.171***	(0.026)	



## Results (implications for Swiss Heroic viticulture) :

Strong correlations of Wines from Lavaux (Chasselas) and Ticino (Merlot) on Swiss fine wine prices (almost +2% of prices and strongly significant).

# Pricing of Wine Labels and Rewards (Devaud, Fenal, Mondoux, ongoing research)

- Data base from 220 Vaud producers and 4426 wines in 2025 (direct sales)
- Methodology: Hedonic regression
- Dependent variable: ln (price)
- Independent variables: Product attributes (varietals), Color, Aging technique, Labels, Rewards, Parker scores

$$p_i = \beta_0 + \sum_{k=1}^K \beta_k x_{ki} + \varepsilon_i$$



BIO SUISSE

Robert Parker  
WINE ADVOCATE

Variable	Description	Specification 1	
<b>A. Labels</b>			
Designation 1	Grand Cru	0.052	0.013
	Premier Grand Cru	0.238	0.048
Designation 2	Abbaye	-0.459	0.233
	Clos	0.086	0.032
	Château	0.021	0.040
Designation 3	Domaine	-0.011	0.032
	BioSuisse	0.084	0.032
	Bio en reconversion	-0.059	0.101
	Demeter/Biodynamic	-0.082	0.085

<b>B. Rewards</b>			
Grands Prix du Vin Suisse (GPVS)	Gold	0.069	0.029
	Silver	0.014	0.030
	Bronze or other	0.040	0.032
Sélection des Vins Valdois	Gold	0.047	0.028
	Silver	0.053	0.032
	Bronze or other	-0.007	0.034
Terravin	Gold	-0.031	0.022
	Silver	0.138	0.145
	Bronze or other	0.002	0.036
Mondial du Chasselas	Gold	0.068	0.036
	Silver	0.097	0.042
	Bronze or other	0.098	0.108
Expovina	Gold	0.099	0.050
	Silver	0.020	0.059
	Bronze or other	0.048	0.058

<b>C. Rankings</b>			
Falstaff		-0.035	0.045
Parker		0.390	0.067
<b>D. Wine specifications</b>			
Livestock	Aged in oak barrels/casks	0.215	0.009
	Amphora	0.140	0.039
	Concrete	-0.105	0.123
Réserve		0.044	0.021
Vielles Vignes		-0.030	0.024
Varietals	Chasselas	-0.186	0.012
	Pinot noir	-0.068	0.011
	Merlot	0.194	0.019

## Results :

Strong correlations of Wine Labels (Grand crus, BioSuisse, etc.) and Rewards (GPVS, Mondial du Chasselas, Expovina, etc.) on Vaud wine prices.

# Conclusions

Global viticulture is undergoing structural and economic transformation

Heroic viticulture sits at a delicate balance:

- Supply side: higher production costs per hectare
- Demand side: premium pricing, reputation and origin labelling

The long-term sustainability of Heroic viticulture depends on aligning three dimensions ensuring fair economic returns, supporting environmental stewardship, and maintaining strong social engagement.

Thank you very much for the attention!!

A team at your service

**Head OSMV and Associate Professor UAS in Economics**

Alexandre Mondoux ([alexandre.mondoux@changins.ch](mailto:alexandre.mondoux@changins.ch))

**Scientific Collaborators in wine economics**

Candice Devaud

Roxane Fenal

- Telephone : 022 363 40 50
- E-mail OSMV : [osmv@changins.ch](mailto:osmv@changins.ch)
- Website : <https://www.changins.ch/rechercheappliquee>