



**COUNCIL OF  
THE EUROPEAN UNION**

**Brussels, 11 December 2012**

**17630/12  
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**AGRI 861  
AGRIORG 209  
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**COVER NOTE**

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from: Secretary-General of the European Commission,  
signed by Mr Jordi AYET PUIGARNAU, Director

date of receipt: 10 December 2012

to: Mr Uwe CORSEPIUS, Secretary-General of the Council of the European  
Union

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No Cion doc.: SWD(2012)415

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Subject: Report from the Commission to the European Parliament and the Council in  
accordance with Article 184(8) of Council Regulation (EC) No 1234/2007 on  
the experience gained with the implementation of the wine reform of 2008  
- *Commission staff working document*

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Delegations will find attached a Commission staff working document accompanying the report  
from the Commission.

Encl.: SWD(2012)415



Brussels, 10.12.2012  
SWD(2012) 415 final

**COMMISSION STAFF WORKING DOCUMENT**  
*Accompanying the document*

**Report from the Commission to the European Parliament and the Council**  
**in accordance with Article 184 (8) of Council Regulation (EC) No 1234/2007 on the**  
**experience gained with the implementation of the wine reform of 2008**

{COM(2012) 737 final}

## TABLE OF CONTENTS

COMMISSION STAFF WORKING DOCUMENT .....	3
1. Market situation .....	5
1.1. Supply / EU Demand .....	5
1.2. Trade .....	9
1.2.1. Exports / Imports.....	9
1.2.2. Trade balance .....	12
1.2.3. Stocks and prices.....	15
2. Grubbing-up scheme .....	16
3. National support programmes .....	18
3.1. Restructuring and conversion measure .....	21
3.2. Promotion on third country markets .....	24
3.3. Investments .....	25
3.4. Transfer to the Single Payment Scheme .....	26
3.5. By-products distillation and other measures .....	27

**COMMISSION STAFF WORKING DOCUMENT**  
*Accompanying the document*

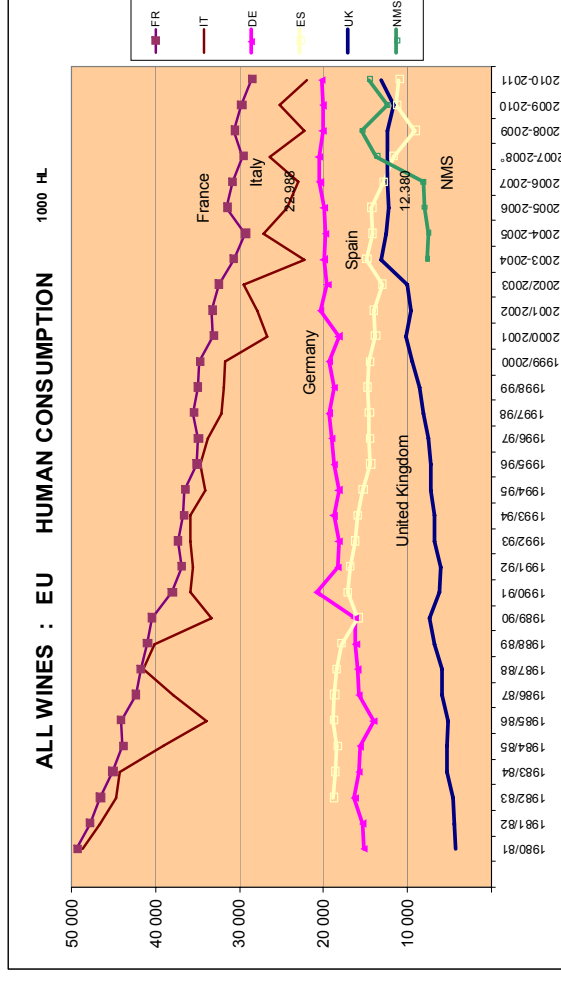
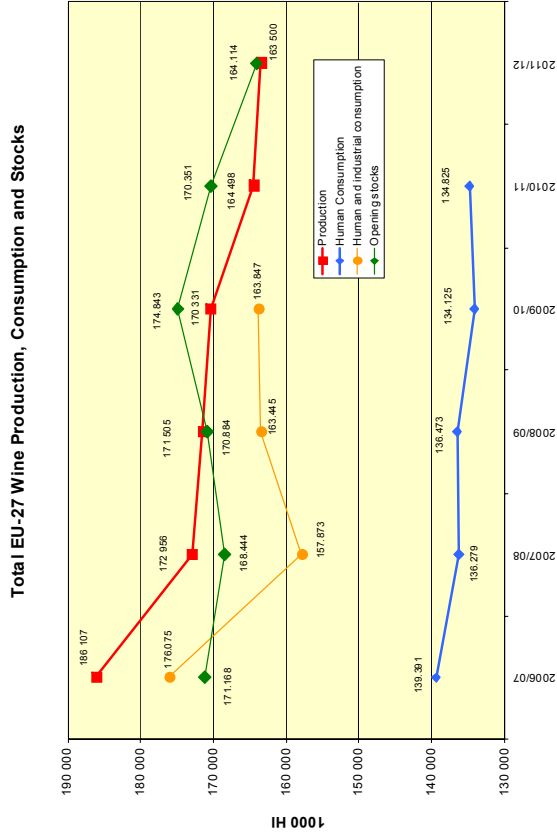
**Report from the Commission to the European Parliament and the Council**  
**in accordance with Article 184 (8) of Council Regulation (EC) No 1234/2007 on the**  
**experience gained with the implementation of the wine reform of 2008**

## ABBREVIATIONS AND ACRONYMS

CMO	Common market organisation
GI	geographical indication
ha	hectare
hl	hectolitre
HLG	High Level Group
NSP	national support programmes
OIV	International Organisation of Vine and Wine
PDO	protected designation of origin
PGI	protected geographical indication
SCMO	Single common market organisation
SPS	Single Payment Scheme
TT	traditional terms
WTO-TRIPS	World Trade Organisation – Trade-Related Aspects of Intellectual Property Rights

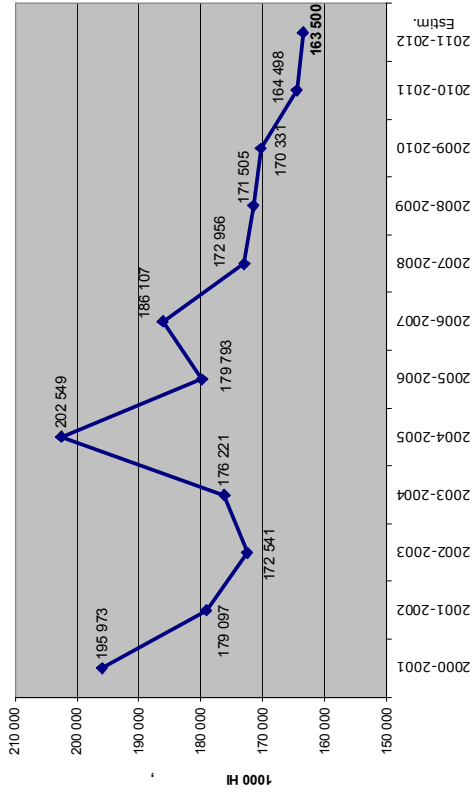
# 1. MARKET SITUATION

## 1.1. Supply / EU Demand

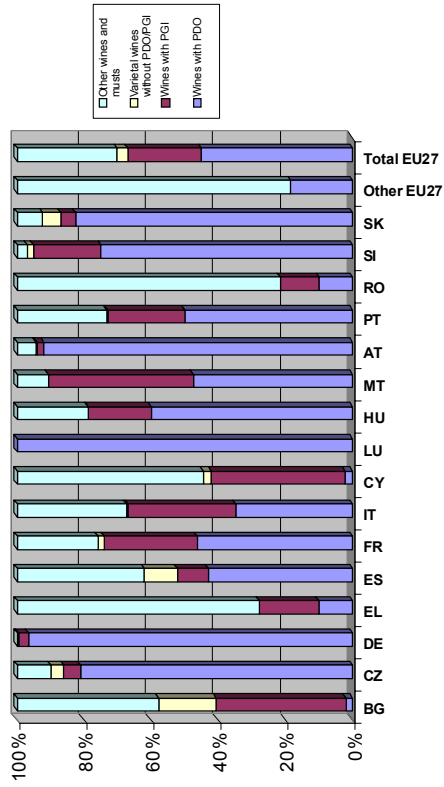


Source: Member States' communications of Article 19(1)(b) of Commission Regulation (EC) No 436/2008.

### Total EU-27 production of wine products Situation June 10th 2012

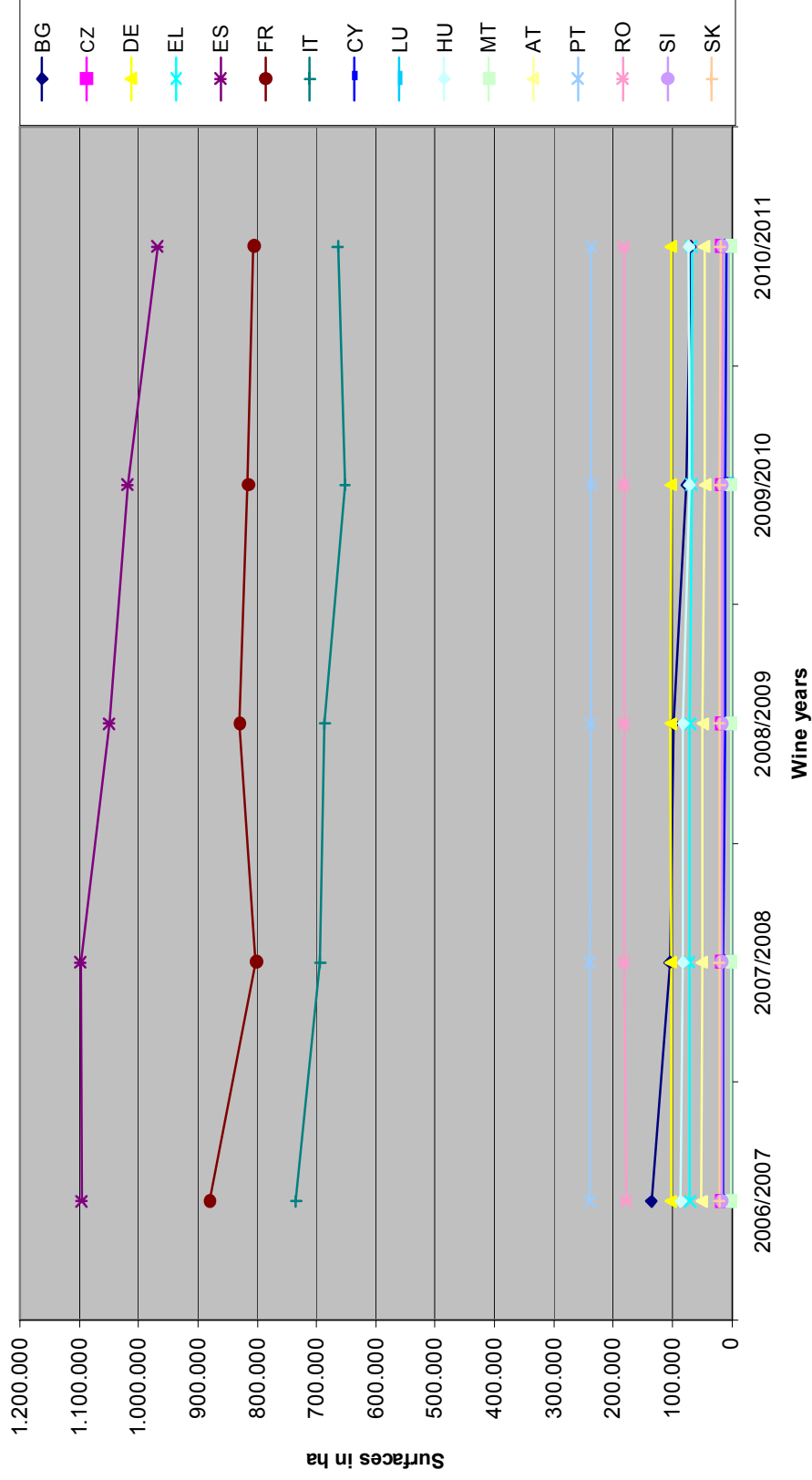


### 2011-2012 EU Wine production by category (PDO, PGI, VAR, others)



Source: Member States' communications of Article 19(1)(b) of Commission Regulation (EC) No 436/2008.

## Surfaces evolution for EU 27 from 2007 to 2011



Source: Member States' communications of Tables 7.1 and 7.2 of the Annex to Commission Regulation (EC) No 1227/2000 and Member States' communications of Table 14 of Annex XIII to Commission Regulation (EC) No 555/2008



### Total world production of wine

	Values in thousand hectoliter			Growth rate	
	1999-2001	2009-2011	2020	2000-2010	2012-2020
Argentina	14,753	13,953	14,650	-0.6	0.3
Australia	9,102	11,320	12,500	2.2	1.3
Brazil	3,241	2,875	3,465	-1.2	0.9
Canada	462	500	500	0.8	0.0
Chile	5,644	9,538	11,500	5.4	2.4
China	10,520	13,000	15,450	2.1	1.7
Japan	1,027	892	855	-1.4	-0.6
New Zealand	579	2,100	3,100	13.8	3.8
Russia	3,013	7,450	8,950	9.5	1.8
South Africa	7,129	9,769	10,200	3.2	1.0
USA	19,917	19,273	20,000	-0.3	0.5
Rest of the world	15,239	15,864	17,500	0.4	1.5
<b>World total</b>	<b>275,630</b>	<b>263,898</b>	<b>270,070</b>	<b>-0.4</b>	<b>0.3</b>
Germany	10,391	8,390	9,200	-2.1	0.3
UK	14	25	20	5.6	0.0
Rest of the EU	174,598	148,949	142,180	-1.6	-0.5
<b>EU</b>	<b>185,003</b>	<b>157,364</b>	<b>151,400</b>	<b>-1.6</b>	<b>-0.5</b>

Source: DG AGRI (European Commission)



Export to third Countries in value (1000 €)

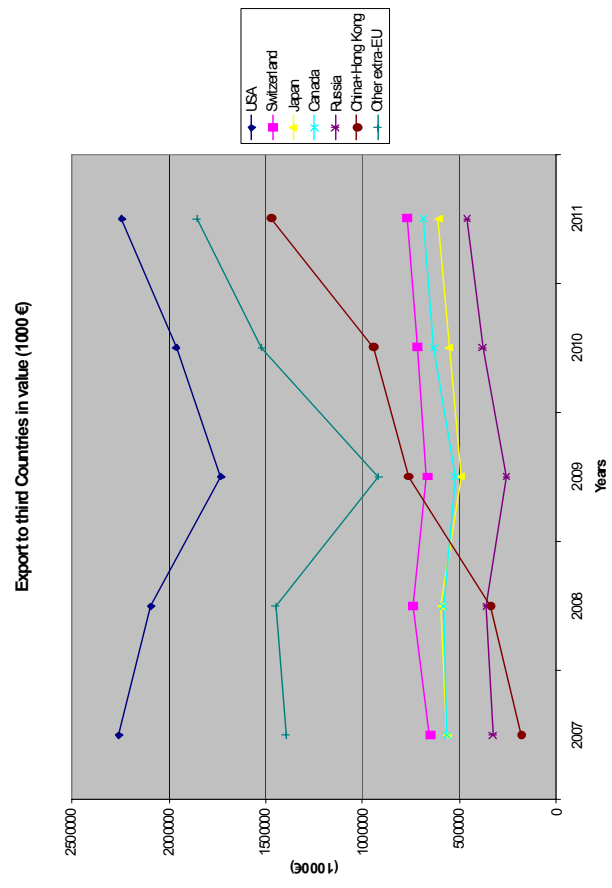
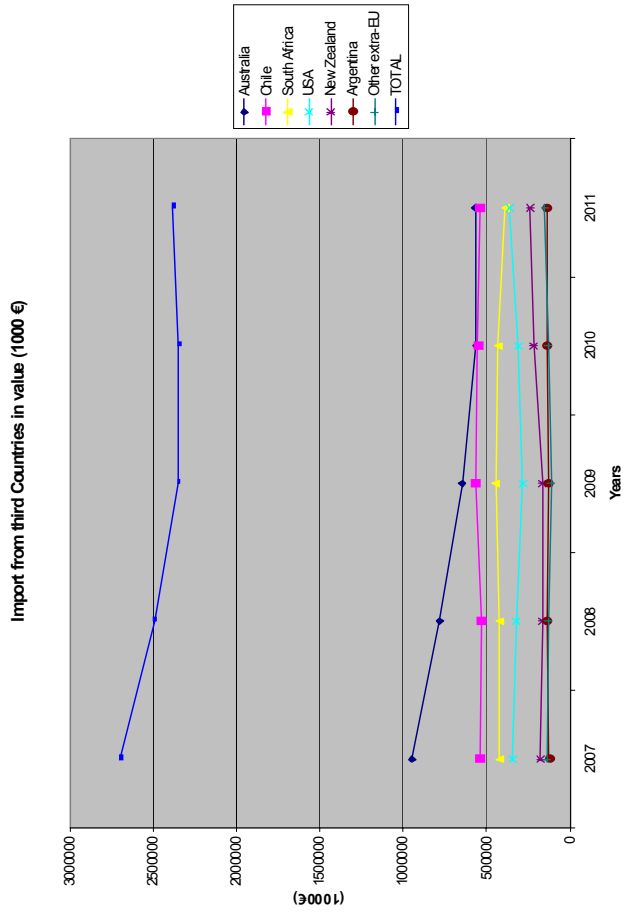
2007 - EU27		2008 - EU27		2009 - EU27		2010 - EU27		2011 - EU27		Variation 2011/2007	
USA	2.258.303	2.093.896	1.731.065	1.960.677	1.960.677	USA	2.240.387	1.960.677	USA	2.240.387	-1%
Switzerland	653.859	740.638	668.191	668.191	668.191	Switzerland	772.939	719.769	Switzerland	772.939	18%
Japan	566.095	596.326	492.008	492.008	492.008	Japan	610.060	552.763	Japan	610.060	8%
Canada	563.352	582.785	522.313	522.313	522.313	Canada	687.458	631.347	Canada	687.458	22%
Russia	329.309	361.661	258.290	258.290	258.290	Russia	461.128	380.395	Russia	461.128	40%
China+Hong Kong	182.099	339.955	763.121	763.121	763.121	China+Hong Kong	1.471.165	944.453	China+Hong Kong	1.471.165	708%
Other extra-EU	1.397.422	1.460.412	919.629	919.629	919.629	Other extra-EU	1.856.611	1.521.035	Other extra-EU	1.856.611	33%
TOTAL	5.950.439	6.165.673	5.354.618	5.354.618	5.354.618	TOTAL	8.100.348	6.710.439	TOTAL	8.100.348	36,1%

Import from third Countries in value (1000 €)

2007 - EU27		2008 - EU27		2009 - EU27		2010 - EU27		2011 - EU27		Variation 2011/2007	
Australia	946.429	782.267	646.067	646.067	646.067	Chile	563.855	563.855	Chile	563.855	0%
Chile	542.884	530.812	565.361	565.361	565.361	Australia	541.259	555.020	Australia	541.259	-2%
South Africa	424.060	422.258	445.653	445.653	445.653	South Africa	387.562	431.470	South Africa	387.562	-10%
USA	345.539	321.161	281.882	281.882	281.882	USA	363.796	308.597	USA	363.796	18%
New Zealand	176.671	166.720	165.756	165.756	165.756	New Zealand	238.041	217.708	New Zealand	238.041	9%
Argentina	125.011	137.242	130.512	130.512	130.512	Argentina	136.288	138.510	Argentina	136.288	-2%
Other extra-EU	137.859	131.692	113.776	113.776	113.776	Other extra-EU	150.569	131.324	Other extra-EU	150.569	15%
TOTAL	2.698.453	2.492.152	2.349.006	2.349.006	2.349.006	TOTAL	2.383.187	2.346.484	TOTAL	2.383.187	1,6%

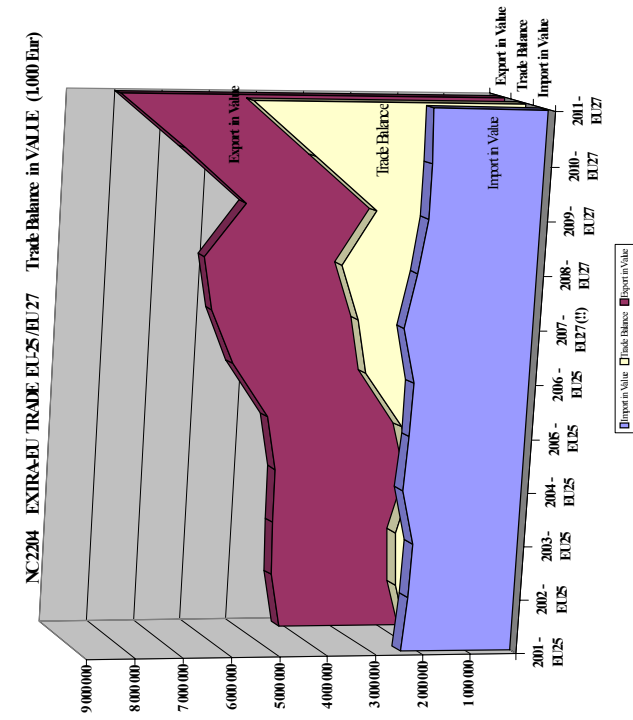
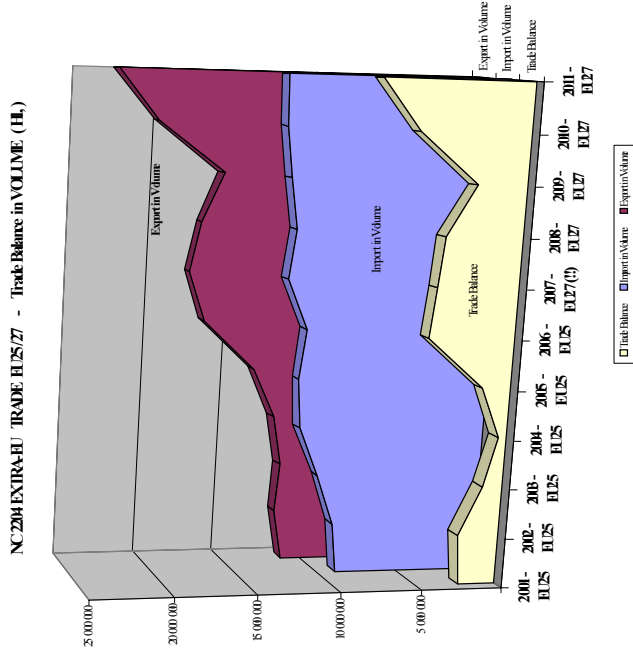
2007 - EU27		2008 - EU27		2009 - EU27		2010 - EU27		2011 - EU27		Variation 2011/2007	
	3.251.986	3.673.521	3.005.612	3.005.612	3.005.612		5.717.161	4.363.955	5.717.161	76%	

Source: EC-EUROSTAT COMEXT external trade DataBases

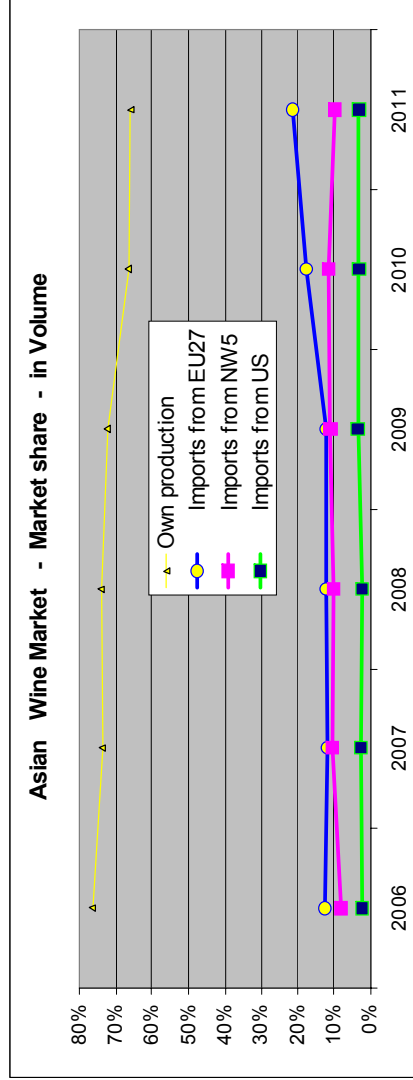
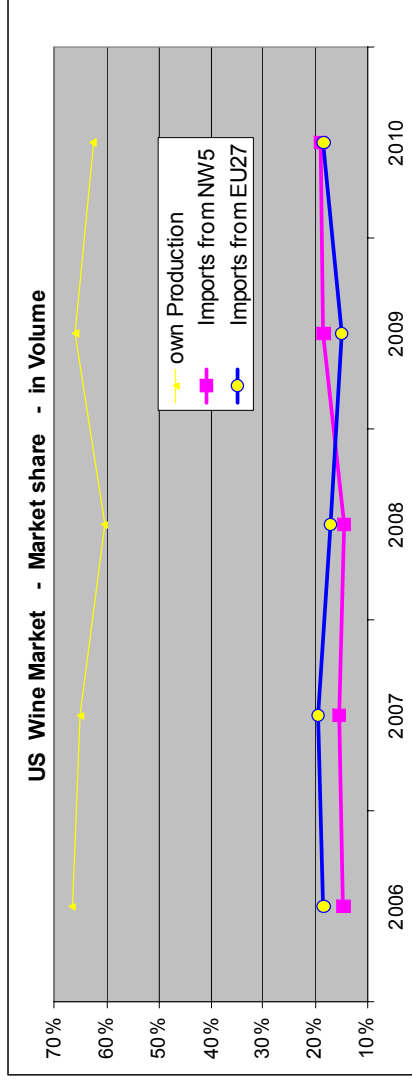


Source: EC-EUROSTAT COMEXT external trade DataBases

### 1.2.2. Trade balance

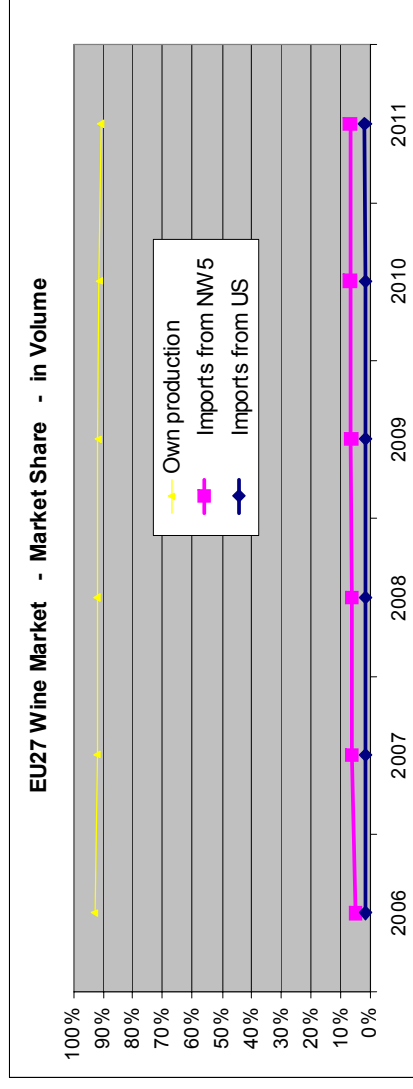
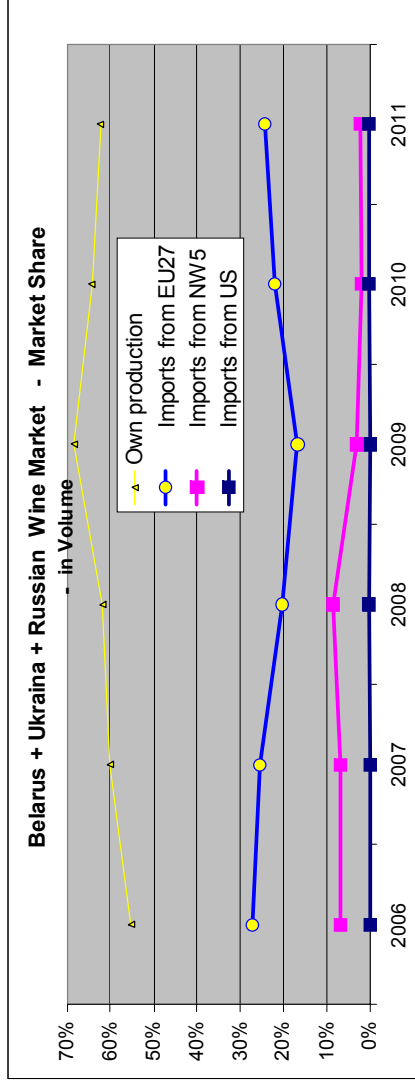


Source: EC-EUROSTAT COMEXT external trade DataBases



NW5 : Argentina + Australia + South-Africa +Chile + New Zealand

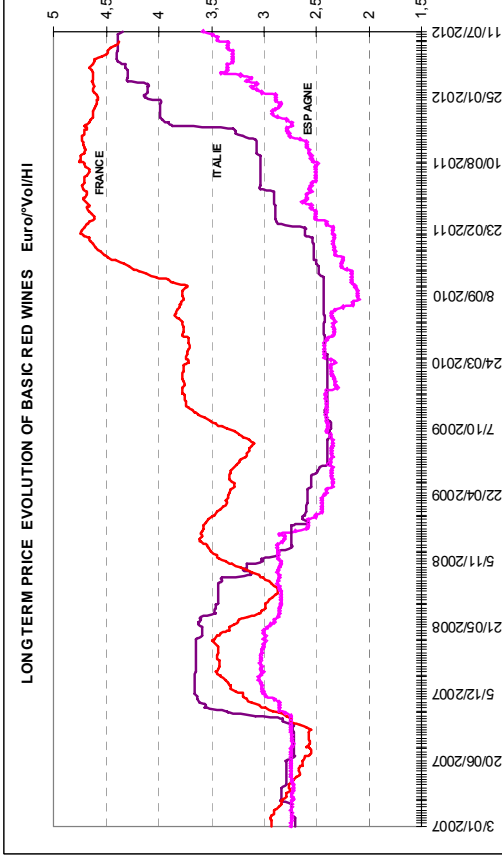
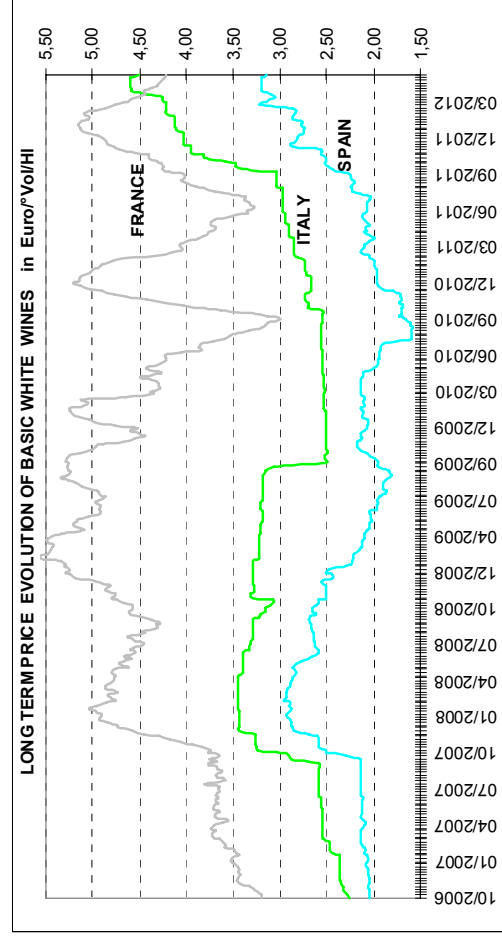
Source : Eurostat COMTRADE, COMEXT, OIV - compilation DG AGRI-C3.



NW5 : Argentina + Australia + South-Africa +Chile + New Zealand

Source : Eurostat COMTRADE, COMEXT, OIV - compilation DG AGRI-C3.

### 1.2.3. Stocks and prices

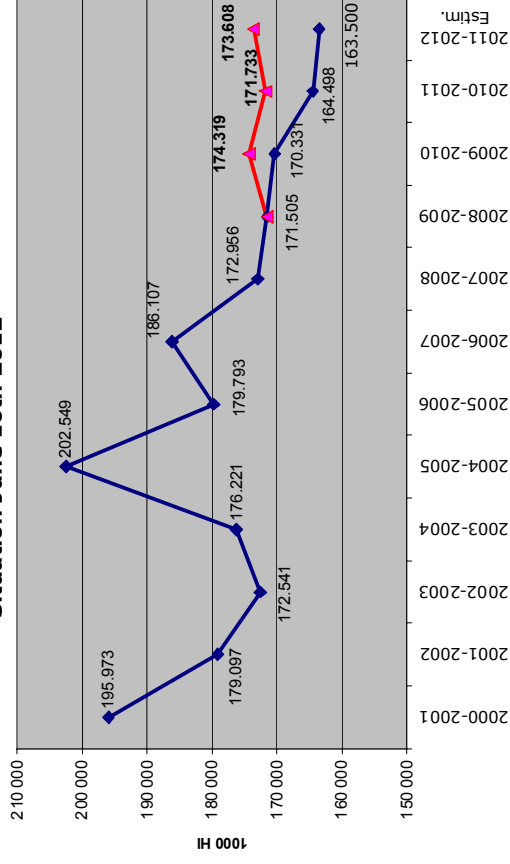


Sources: La semana vitivinícola, Il corriere vinicolo and [www.franceagrimer.fr](http://www.franceagrimer.fr)



## 2. GRUBBING-UP SCHEME

**Total EU-27 production of wine products  
Incl. simulation without grubbing-up (red line)  
Situation June 10th 2012**



Source: Member States' communications of Article 19(1)(b) of Commission Regulation (EC) No 436/2008.

Castilla La Mancha (Spain)	69 000 ha
Languedoc Roussillon (France)	15 882 ha
Puglia (Italy)	10 606 ha
Sicilia (Italy)	6 603 ha

**GRUBBING-UP scheme**

***Estimated yearly production reduction by Member States (hl)***

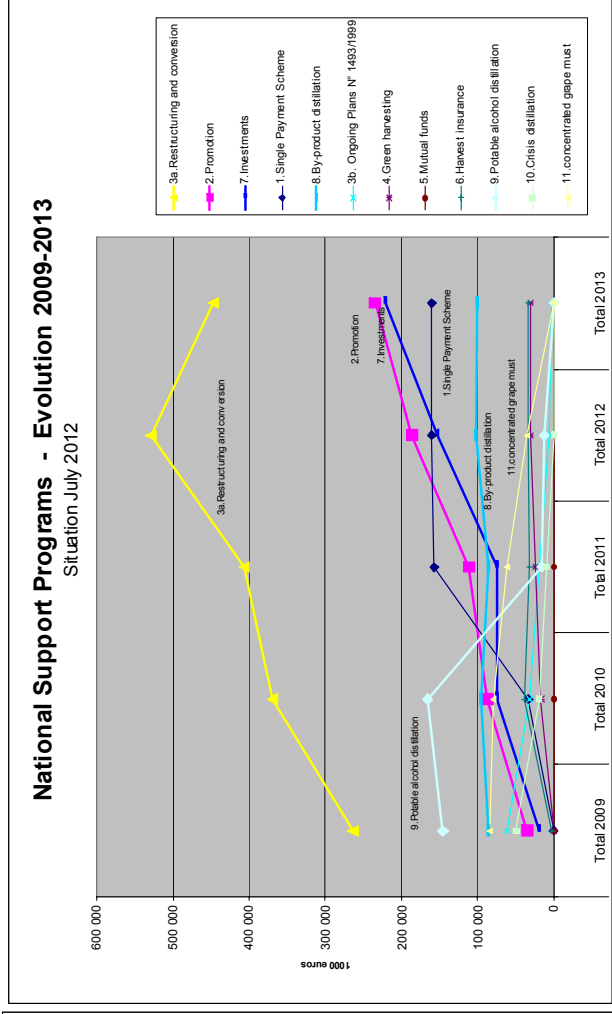
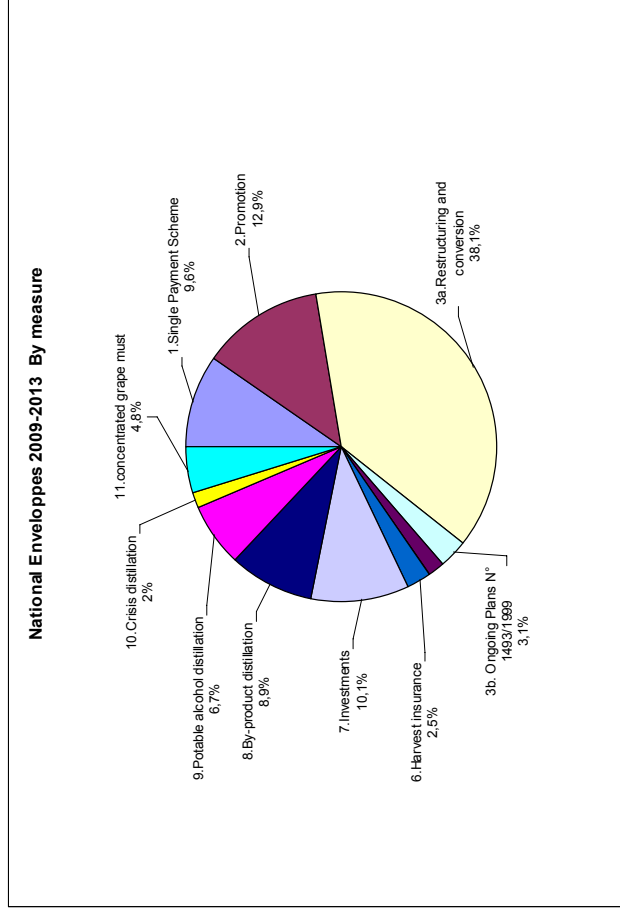
Yield range (hl/ha)	≤ 20	> 20 and ≤ 30	> 30 and ≤ 40	> 40 and ≤ 50	> 50 and ≤ 90	> 90 and ≤ 130	> 130 and ≤ 160	> 160	Total
<b>EU</b>	82.366	452.069	769.106	1.189.926	4.362.645	1.465.407	640.553	1.145.722	<b>10.107.791</b>

By Member State:

<b>BG</b>	77	144	141	654	2.180	0	0	0	<b>3.195</b>
<b>CZ</b>	62	173	0	5	0	0	0	0	<b>241</b>
<b>DE</b>	1	46	21	19	791	9.435	0	0	<b>10.315</b>
<b>EL</b>	0	0	162	387	129.327	5.767	2.903	8.809	<b>147.355</b>
<b>ES</b>	72.008	392.707	619.785	894.395	2.115.501	321.386	61.690	21.964	<b>4.499.434</b>
<b>FR</b>	1.383	17.599	54.960	134.254	1.146.885	88.380	2.580	6.720	<b>1.452.761</b>
<b>IT</b>	585	8.593	28.056	63.971	600.713	809.772	549.195	1.098.278	<b>3.159.163</b>
<b>CY</b>	40	2.782	3.301	22.337	22.433	75.881	0	0	<b>126.773</b>
<b>LU</b>	0	0	0	0	0	153	0	0	<b>153</b>
<b>HU</b>	2.973	10.131	23.453	28.220	193.279	92.677	11.101	4.193	<b>366.028</b>
<b>MT</b>	0	0	0	0	0	0	0	0	<b>0</b>
<b>AT</b>	95	641	1.753	5.519	40.896	3.571	41	30	<b>52.546</b>
<b>PT</b>	3.962	13.592	21.004	24.904	93.447	41.355	12.721	5.467	<b>216.451</b>
<b>RO</b>	121	376	13.263	3.811	10.960	16.611	97	261	<b>45.500</b>
<b>SI</b>	38	256	1.850	1.163	5.808	419	225	0	<b>9.759</b>
<b>SK</b>	1.020	5.029	1.357	10.287	426	0	0	0	<b>18.118</b>

Source: Member States' communications of Table 12 of Annex XIII to Commission Regulation (EC) No 555/2008.

### 3. NATIONAL SUPPORT PROGRAMMES



Source: Member States' communications of Annex IV to Commission Regulation (EC) No 555/2008 and DG AGRI Unit I.4 – Financial Management of EAGF based on Member States' monthly declarations.

## National support programme for 2009-2013

in 1000 euros	Total 2009	Total 2010	Total 2011	Total 2012	Total 2013	Total 2009-2013	
(1) (2)							
1.Single Payment Scheme	0	33.353	156.630	159.875	159.857	509.715	10%
2.Promotion	35.182	87.203	111.657	185.585	234.944	654.571	12%
3.Restructuring and conversion	326.202	400.547	425.915	535.101	449.695	2.137.460	41%
4.Green harvesting	131	16.793	24.566	30.166	30.100	101.755	2%
5.Mutual funds	0	0	0	0	0	0	0%
6.Harvest insurance	1.972	38.334	31.199	33.293	34.252	139.050	3%
7.Investments	18.642	74.342	74.363	152.304	220.750	540.402	10%
8.By-product distillation	85.493	95.856	85.474	103.047	100.855	470.725	9%
9.Potable alcohol distillation	145.100	165.527	15.862	12.138	0	338.627	6%
10.Crisis distillation	49.966	19.174	10.645	0	0	79.785	2%
11.concentrated grape must	84.567	78.753	62.377	35.036	0	260.734	5%
<b>Total measures 1 to 11</b>	<b>747.255</b>	<b>1.009.883</b>	<b>998.688</b>	<b>1.246.544</b>	<b>1.230.453</b>	<b>5.232.823</b>	<b>100%</b>

Source: Member States' communications of Annex IV to Commission Regulation (EC) No 555/2008 and DG AGRI Unit I.4 – Financial Management of EAGF based on Member States' monthly declarations.

## National support programme by Member States for 2009-2013

Measure :	Member STATES Total (in 1000 euros)											Member STATE ToTal (in 1000 euros)							Total E.U. 2009-2013
	BG	CZ	DE	EL	ES	FR	IT	CY	LT	LU	HU	MT	AT	PT	RO	SI	SK	UK	
(1) (2)																			
1.Single Payment Scheme	0	0	0	58.000	447.754	0	0	0	0	2.134	0	1.455	0	0	0	0	0	372	509.715
2.Promotion	2.670	0	5.579	16.527	145.104	173.185	263.042	400	90	0	1.000	0	6.770	32.662	3.252	4.170	120	0	654.571
3.Restructuring and conversion	74.597	15.173	81.741	22.701	427.248	452.152	507.373	11.614	0	100	99.443	0	18.503	186.660	205.445	16.315	18.393	0	2.137.460
4.Green harvesting	0	0	0	0	0	0	100.404	816	0	0	0	0	0	0	0	534	0	0	101.755
5.Mutual funds	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6.Harvest insurance	4.958	0	8.126	0	0	1.198	103.110	598	0	0	0	0	0	18.968	1.532	0	560	0	139.050
7.Investments in enterprises	0	6.272	65.008	0	56.300	276.822	86.571	6.106	0	0	9.063	0	32.425	0	0	0	1.835	0	540.402
8.By-product distillation	0	0	0	0	160.899	180.311	105.894	0	0	0	8.349	0	0	15.272	0	0	0	0	470.725
9.Potable alcohol distillation	0	0	0	0	232.802	0	94.463	0	0	0	2.195	0	0	9.167	0	0	0	0	338.627
10.Crisis distillation	0	0	0	0	0	32.739	47.046	0	0	0	0	0	0	0	0	0	0	0	79.785
11.Use of concentrated grape must	0	0	3.227	2.156	0	54.526	191.354	0	0	246	2.105	0	0	6.068	243	369	441	0	260.734
<b>Total:</b>	<b>82.225</b>	<b>21.445</b>	<b>163.679</b>	<b>99.384</b>	<b>1.470.106</b>	<b>1.170.934</b>	<b>1.499.257</b>	<b>19.534</b>	<b>90</b>	<b>2.480</b>	<b>122.156</b>	<b>1.455</b>	<b>57.698</b>	<b>268.798</b>	<b>210.473</b>	<b>21.388</b>	<b>21.349</b>	<b>372</b>	<b>5.232.823</b>
10a.Crisis distillation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Regulation (EC) No. 479/2008 Annex II Budget	112.683	21.640	164.252	101.475	1.487.851	1.187.388	1.508.631	19.586	202	2.478	122.175	1.687	57.763	274.035	210.500	25.589	21.349	1.172	5.320.356

Source: Member States' communications of Annex IV to Commission Regulation (EC) No 555/2008 and DG AGRI Unit I.4 – Financial Management of EAGF based on Member States' monthly declarations.

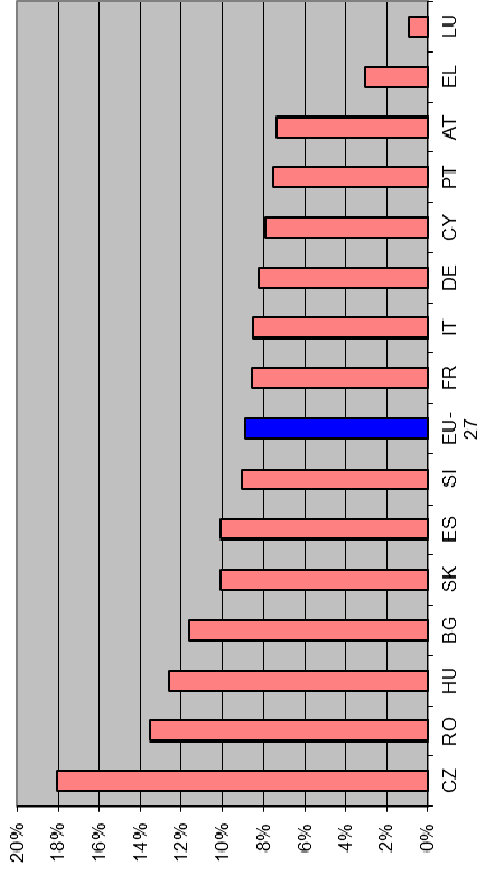
### 3.1. Restructuring and conversion measure

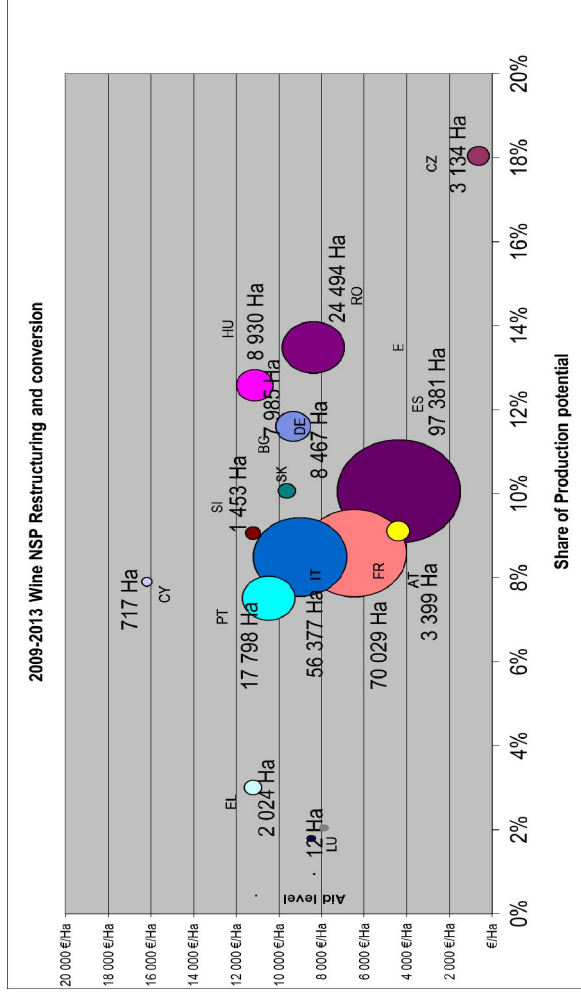
#### WINE 5-year National Support Programmes : RESTRUCTURING & Conversion

Overview	Member States														Total EU				
	BG	CZ	DE	EL	ES	FR	IT	CY	LT	LU	HU	MT	AT	PT		RO	SI	SK	UK
Ha.	7 985	3 134	8 467	2 024	97 381	70 029	56 377	717	12	8 930	12	8 930	3 399	17 798	24 494	1 453	1 909		<b>304 110 Ha</b>
3a+ b. Restructuring m€	74 597	15 173	81 741	22 701	427 248	452 152	540 763	11 614	100	99 443	100	99 443	18 503	186 660	205 445	16 315	18 393		<b>2 170 850 m€</b>
€/ha	9 342	4 842	9 654	11 214	4 387	6 457	9 592	16 209	8 349	11 136	8 349	11 136	5 444	10 488	8 388	11 228	9 634		<b>7 138 Eur/Ha.</b>
Production Potential 2010 Ha.	68 847	17 370	102 671	67 333	968 298	806 242	663 905	9 066	1 274	71 792	1 274	71 792	46 092	236 816	181 770	16 041	18 971		<b>3 277 179 Ha</b>
% Restructuring / Production Potential	12%	18%	8%	3%	10%	9%	8%	8%	1%	12%	1%	12%	7%	8%	13%	9%	10%		9,3%
Available NSP budget m€	112 683	21 640	164 252	101 475	1 487 851	1 187 388	1 508 531	19 586	202	2 478	122 175	1 687	57 763	274 035	210 500	25 589	21 349		<b>5 320 356 m€</b>
% Restructuring / Available budget	66%	70%	50%	22%	29%	38%	36%	59%	0%	4%	81%	0%	32%	68%	98%	64%	86%		40,8%

Source: Member States' communications of Annex VII and Table 14 of Annex XIII to Commission Regulation (EC) No 555/2008 and Annex Xb to Council Regulation (EC) No 1234/2007

Wine 5Y NSP: Restructuring & Conversion  
 Hectares restructured versus Production Potential





Source: Member States' communications of Annex IV to Commission Regulation (EC) No 555/2008 and DG AGRI Unit I.4 – Financial Management of EAGF based on Member States' monthly declarations.



### 3.2. Promotion on third country markets

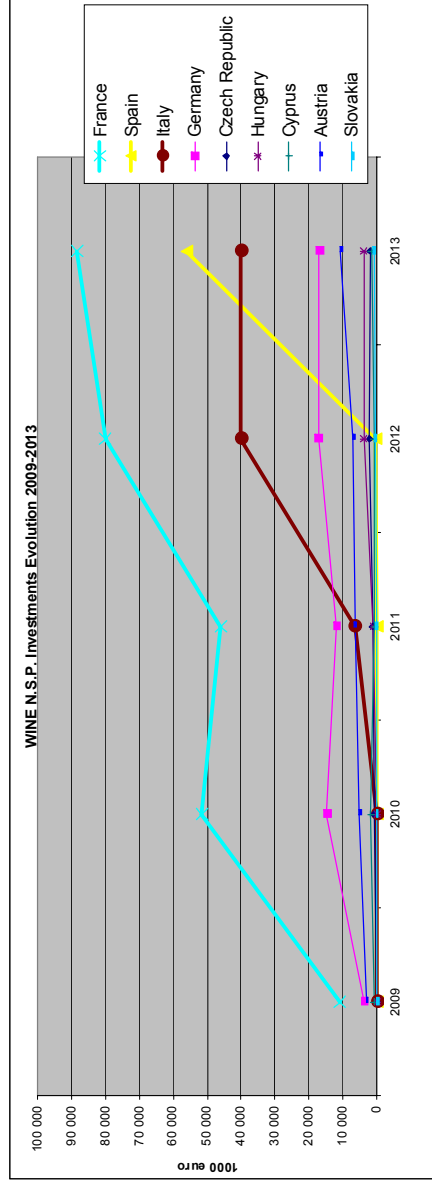
National support programme for 2009-2013							
Promotion							
	Total 2009 (in 1000 euros)	Total 2010 (in 1000 euros)	Total 2011 (in 1000 euros)	Total 2012 (in 1000 euros)	Total 2013 (in 1000 euros)	Total 2009-2013 (in 1000 euros)	Percentage of total for 2009- 2013
BG					2.670	2.670	0,4%
CZ							
DE	462	31	1.026	1.980	2.080	5.579	0,9%
EL	0	5.233	3.295	4.000	4.000	16.527	2,5%
ES	6.981	24.431	29.692	44.000	40.000	145.104	22,2%
FR	18.426	27.004	20.056	40.000	67.700	173.185	26,5%
IT	4.867	25.111	48.518	82.381	102.164	263.042	40,2%
CY					400	400	0,1%
LT				45	45	90	0,0%
LU							
HU					1.000	1.000	0,2%
MT							
AT	918	1.401	1.450	1.500	1.500	6.770	1,0%
PT	2.959	3.288	6.115	9.500	10.800	32.662	5,0%
RO	54	82	572	1.159	1.385	3.252	0,5%
SI	515	623	932	1.000	1.100	4.170	0,6%
SK				20	100	120	0,0%
UK							
<b>Total EU-27:</b>	<b>35.182</b>	<b>87.203</b>	<b>111.657</b>	<b>185.585</b>	<b>234.944</b>	<b>654.571</b>	<b>100,0%</b>

Source: Member States' communications of Annex IV to Commission Regulation (EC) No 555/2008 and DG AGRI Unit I.4 – Financial Management of EAGF based on Member States' monthly declarations.

### 3.3. Investments

	Total 2009	Total 2010	Total 2011	Total 2012	Total 2013	Total 2009-2013	% of N.S..P
in 1000 euros							
<b>Investments</b>	18 642	74 342	74 363	152 304	220 750	<b>540 402</b>	<b>10%</b>

Czech Republic		875	1 240	2 130	2 027	6 272	29%
Germany	3 819	14 835	11 959	17 302	17 092	65 008	40%
Spain				300	56 000	56 300	4%
France	10 906	51 504	46 013	80 000	88 400	276 822	24%
Hungary			1 063	4 000	4 000	9 063	7%
Italy			6 571	40 000	40 000	86 571	6%
Cyprus	898	1 874	690	952	1 693	6 106	31%
Austria	3 020	5 179	6 548	7 000	10 678	32 425	56%
Slovakia		75	280	620	860	1 835	9%



Source: Member States' communications of Annex IV to Commission Regulation (EC) No 555/2008 and DG AGRI Unit I.4 – Financial Management of EAGF based on Member States' monthly declarations.

3.4. Transfer to the Single Payment Scheme

TRANSFERS OF FUNDS TO S.P.S.

Total (in euros)	2010	2011	2012	2013	TOTAL	% NSP
BG						
CZ						
DE						
EL	13 000 000	13 000 000	16 000 000	16 000 000	58 000 000	58%
ES	19 507 000	142 749 000	142 749 000	142 749 000	447 754 000	30%
FR						
IT						
CY						
LT						
LU	467 000	485 000	595 000	587 000	2 134 000	86%
HU						
MT	318 000	329 000	407 000	401 000	1 455 000	100%
AT						
PT						
RO						
SI						
SK						
UK	61 000	67 000	124 000	120 000	372 000	100%
<b>EU-27</b>	<b>33 353 000</b>	<b>156 630 000</b>	<b>159 875 000</b>	<b>159 857 000</b>	<b>509 715 000</b>	

Source: Member States' communications of Annex IV to Commission Regulation (EC) No 555/2008 and DG AGRI Unit I.4 – Financial Management of EAGF based on Member States' monthly declarations.

### 3.5. By-products distillation and other measures

Distillations								
Distillation Measures		Total 2009 (in 1000 euros)	Total 2010 (in 1000 euros)	Total 2011 (in 1000 euros)	Total 2012 (in 1000 euros)	Total 2013 (in 1000 euros)	Total 2009-2013 (in 1000 euros)	Percentage of Total NSP budget
<b>8.By-product distillation</b>	ES	31.219	31.558	32.522	33.800	31.800	160.899	
	FR	30.594	35.970	26.248	44.000	43.500	180.311	
	IT	19.800	23.688	22.406	20.000	20.000	105.894	
	Others	3.881	4.640	4.299	5.247	5.555	23.622	
	<b>EU-27</b>	<b>85.493</b>	<b>95.856</b>	<b>85.474</b>	<b>103.047</b>	<b>100.855</b>	<b>470.725</b>	<b>9,0%</b>
<b>9.Potable alcohol distillation</b>	ES	100.105	132.025	671			232.802	
	FR							
	IT	43.412	28.477	12.575	10.000		94.463	
	Others	1.583	5.025	2.617	2.138		11.362	
	<b>EU-27</b>	<b>145.100</b>	<b>165.527</b>	<b>15.862</b>	<b>12.138</b>		<b>338.627</b>	<b>6,5%</b>
<b>10.Crisis distillation</b>	ES							
	FR	22.955	7.108	2.675			32.739	
	IT	27.011	12.066	7.969			47.046	
	Others							
	<b>EU-27</b>	<b>49.966</b>	<b>19.174</b>	<b>10.645</b>			<b>79.785</b>	<b>1,5%</b>
<b>Total Distillation measures</b>		<b>280.559</b>	<b>280.557</b>	<b>111.982</b>	<b>115.185</b>	<b>100.855</b>	<b>889.137</b>	<b>17,0%</b>

Source: Member States' communications of Annex IV to Commission Regulation (EC) No 555/2008 and DG AGRI Unit I.4 – Financial Management of EAGF based on Member States' monthly declarations.