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Winegrape similarities and concentrations: implications

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In a previous article in this journal, we described the mixes of winegrape varieties across countries in terms of both similarities and concentrations. We showed that countries are becoming more similar in their mixes of winegrape varieties between them and with respect to the world as a whole, and that they are becoming more concentrated. The aim of this article is to discuss the implications of these recent changes in similarities and concentrations. These insights are based on those of a recent scientific journal article[1], as well as those from other work – part of which is first published here.

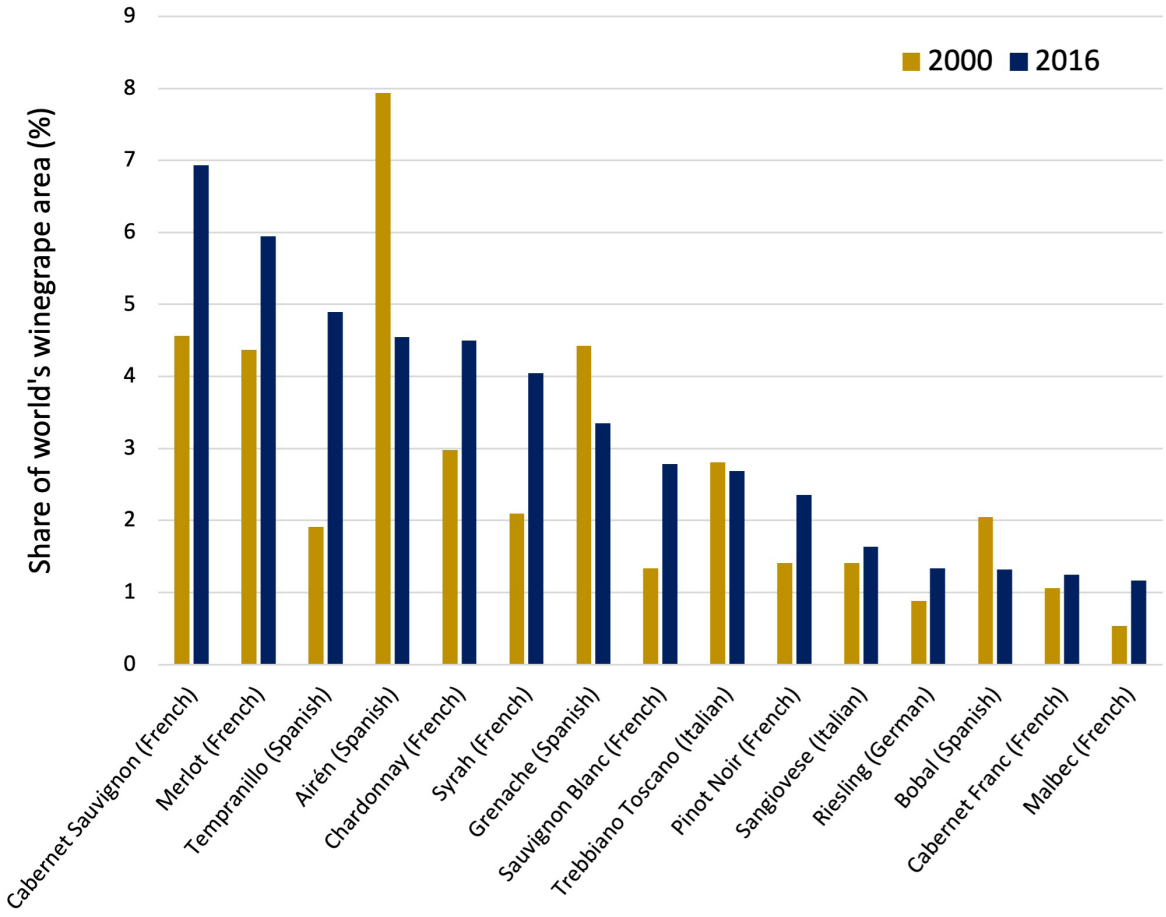


FIGURE 1. Share of world's winegrape area in 2000 and 2016 for the top 15 varieties by winegrape area as for 2016.
Notes: Authors' computation based on the analysis of Anderson and Nelgen (2021)[6] with data from Anderson and Nelgen (2020ab)[2 3]. Each variety's country of origin is in parenthesis.

Figure 1 shows the 15 most planted varieties in the world as of 2016, and how their area share changed between 2000 and 2016. Even though there are more than 1,700 varieties in the database we used for generating this figure (*i.e.*, Anderson and Nelgen (2020ab)[2 3]), almost half of the world's winegrape area is covered by these 15 varieties.

For the two Italian varieties, the area share planted to Trebbiano Toscano has decreased, while that planted to Sangiovese has increased. The area planted to Tempranillo has increased hugely, but the areas planted to the other three Spanish varieties in this figure (Airén, Grenache, and Bobal) have gone down. Airén was the most planted variety at the start of this century, but not anymore. The area of the one German variety in this figure, Riesling, has increased considerably.

All the other varieties in Figure 1 are French: Cabernet Sauvignon, Merlot, Chardonnay, Shiraz, Sauvignon Blanc, Pinot Noir, Cabernet Franc, and Malbec. The area planted to all those varieties has increased substantially.

This raises a question: Does this increasing concentration translate into less diversity of varietal wines for consumers? Not necessarily, because the increase in varietal concentration has been slower than

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the increases in wine exports that we have seen in the past few decades. Two of every five bottles of wine that are consumed globally are imported[4]. This means that consumers are usually able to buy a wines from other countries that grow diverse varieties. That said, other research we have done shows that the more similar the varietal mix of any pair of countries the more they trade wine between them[5].

A related question, especially in the context of climate change, is: Are countries with more similar climates becoming more similar in their varietal mixes? The answer is yes. While this may seem good, other research we have done shows that these countries may not necessarily be evolving towards varieties that are most appropriate for producing high-quality wine in their changing climates[7]. Overall, it seems that producers have found it more profitable to move towards mainstream varieties.

How much of this concentration is caused by European countries' strict planting regulations? The answer is not a lot. There does not seem to be an association between how concentrated countries are and the flexibility that growers have in choosing which varieties to plant (or even in having the right to plant). This suggests that a focus on marketing by geographical indications (as many European countries do) instead of marketing by varieties (like many non-European countries do) may help increase the share of a region that has more appropriate varieties for the (expected) climate of that region.

So, what policies could help increase the share of less-planted varieties that nonetheless have good potential? There may be many. One is for industry bodies to invest in promoting those less-known varieties. Another could involve small changes in regulations. For example, in countries where wine producers usually market their wines by variety, there is often a minimum percentage of wine of a particular variety for the wine to be labelled as made of that variety. Perhaps policymakers could consider decreasing that minimum percentage.

Most of the data used in Puga and Anderson (2023)[1], as well as in much of the other work cited here, are available on the website of the of the Wine Economics Research Centre of the University of Adelaide (https://economics.adelaide.edu.au/wine-economics). All these data can be downloaded for free as Excel files. ■

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