

Development of Organic viti-viniculture in Spain : History and future

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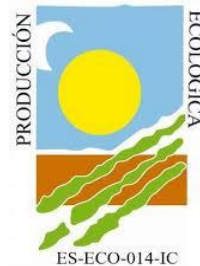
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de la Vigne et du Vin

Summary

- Beginning of organic production: legal aspects and bodies
- Grow of the viti-viniculture
 - Grapes production
 - Wine production
- Perspectives of future
 - Tendencies

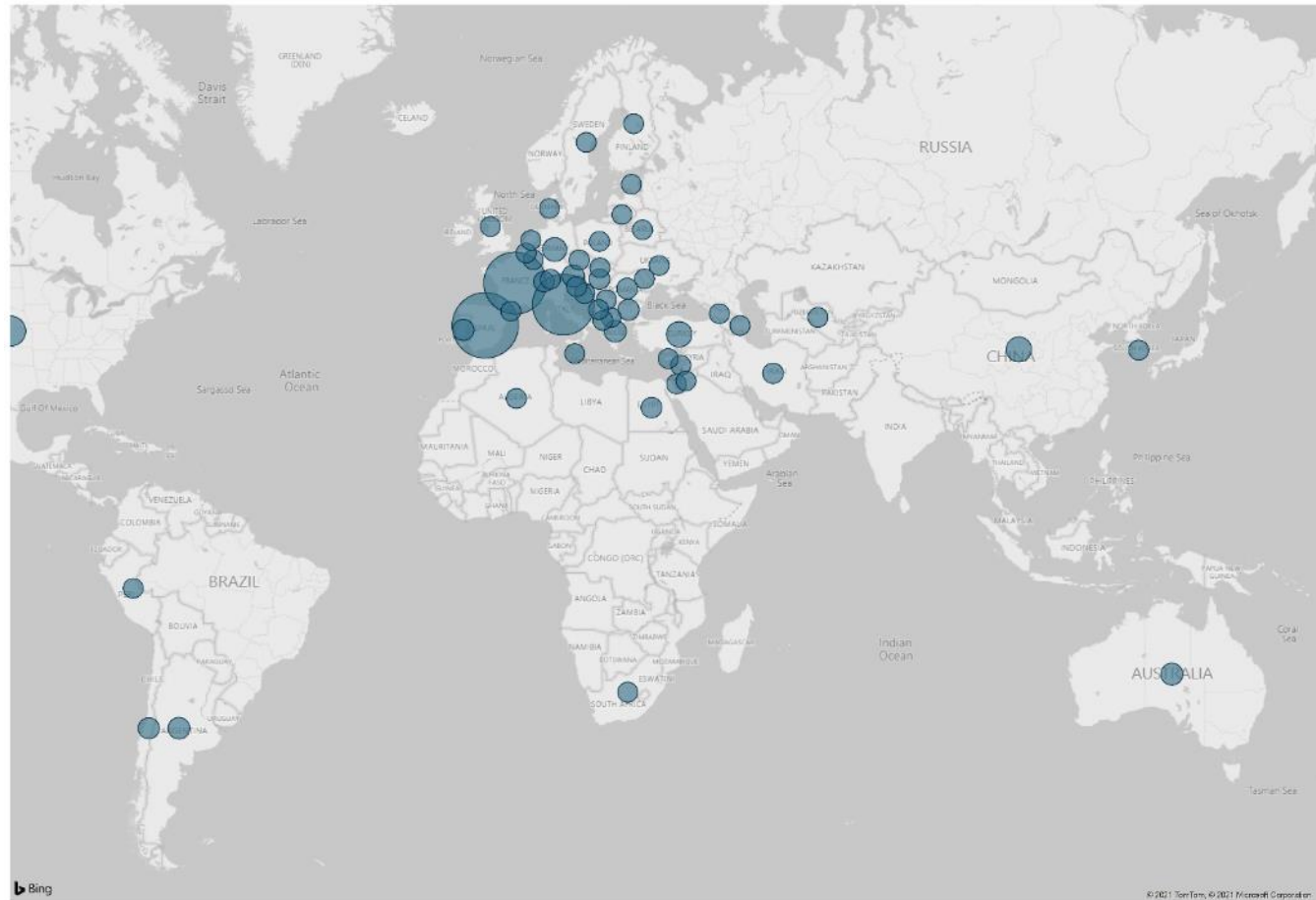
Beginning of organic production in Spain

- First Regulation in 1989: Created the category “Agricultura ecológica”
- Adapted to European Regulation in 1991 (R 2092/91): Comisión Reguladora de Agricultura Ecológica (CRAE)
- Control bodies by regions (1994-):
 - 18 Regions
 - 30 bodies, some of them private companies or public ones.



World organic grapes: Global distribution 2019

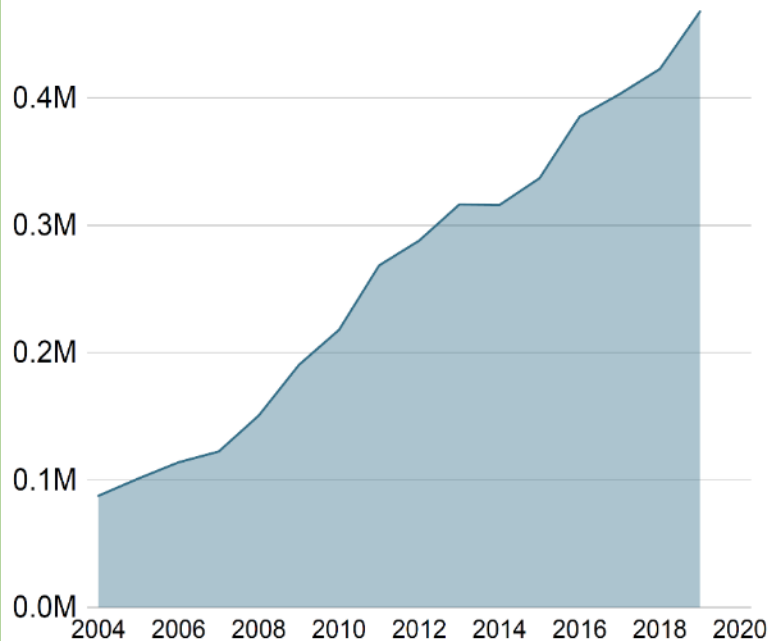
Grapes: Organic area by country



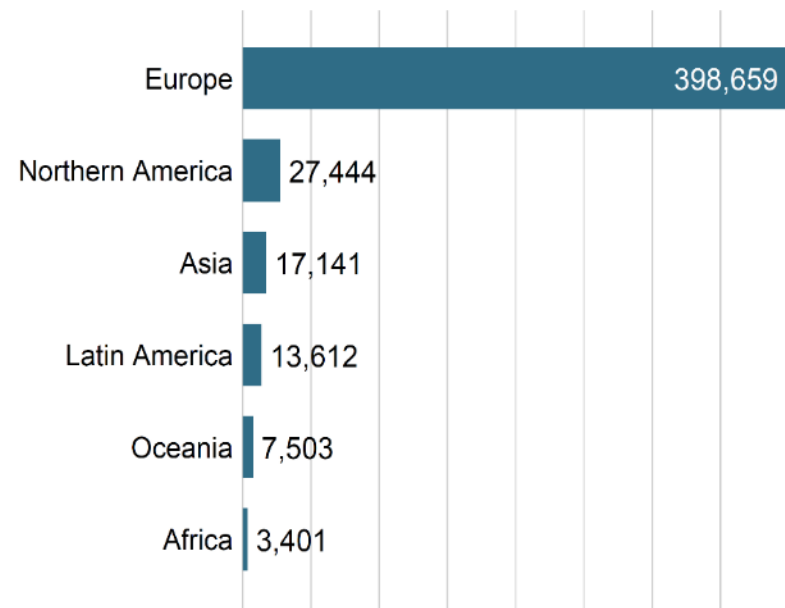
Source: FIBL

World Development of the organic grapes area and area by continent 2019

The development of the organic grapes area in thousand hectares



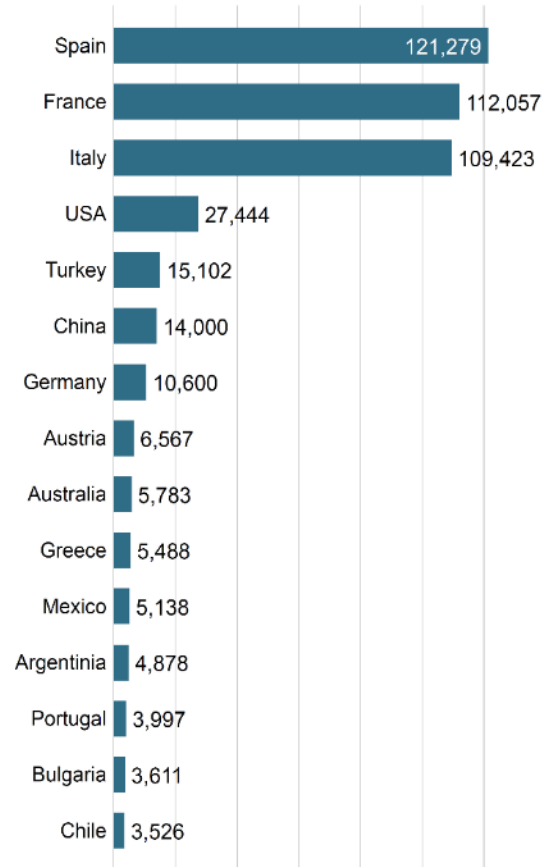
Organic grapes area by continent in hectares



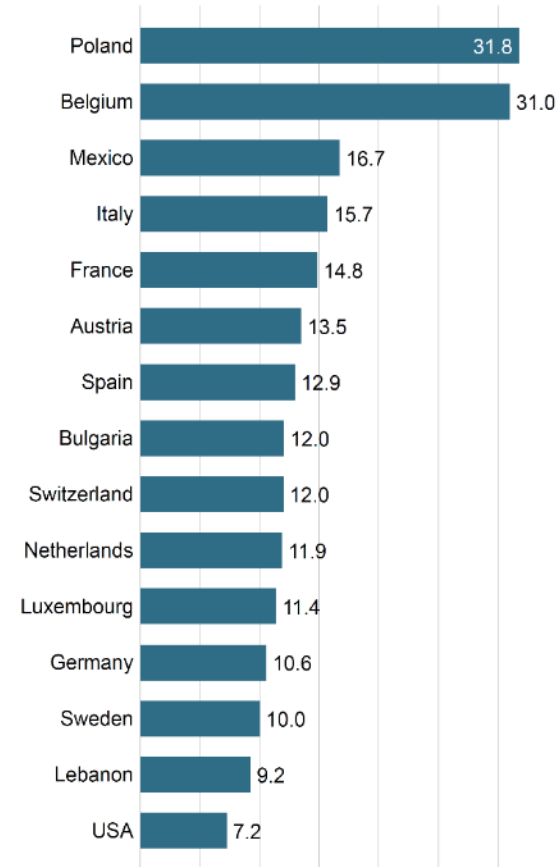
Source: FIBL

World Countries with the largest organic grapes area and highest organic grapes area share 2019

The countries with the largest organic area in hectares

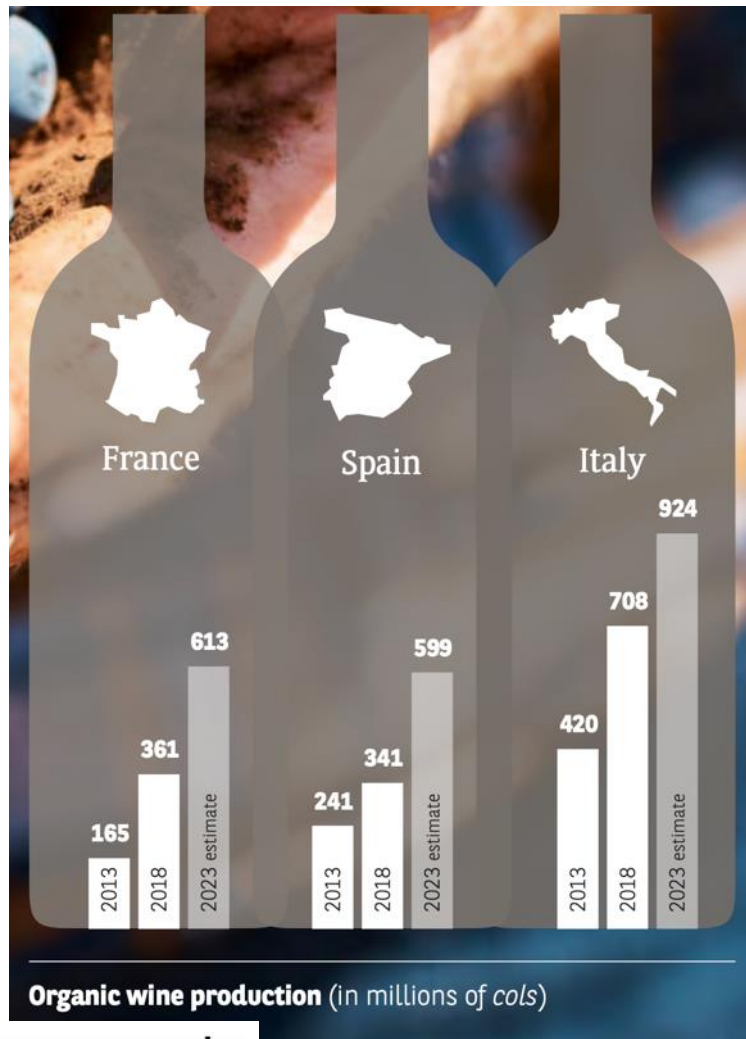


The countries with the highest organic area share in %



Source: FIBL

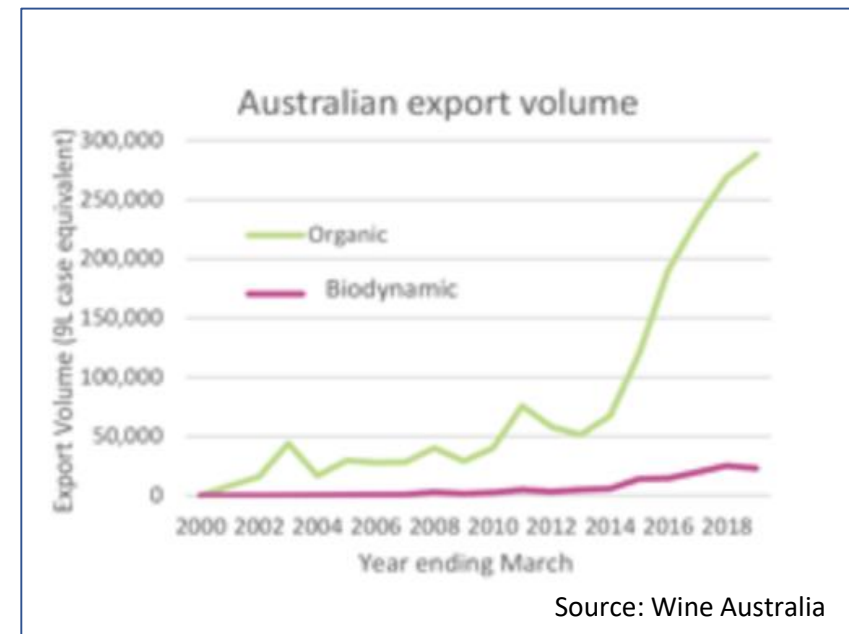
Organic wine production in the world



Europe 80%, US 12%

2014: 7.5 million HI (3 % total production)

2023: 2000 million bottles market



Spain: Vineyards surface among organic production

Tabla I.6. ESTRUCTURA INDUSTRIAL AGROALIMENTARIA ECOLOGICA

MAGNITUDES Y RATIOS	Unidades	2019	2018	2015	Variación 2019/2018 (%)	Variación 2019/2015 (%)
INDUSTRIAS/ELABORADORES ECOLOGICOS	Nº	5.230	4.627	3.482	13,03%	50,20%
ESTABLECIMIENTOS INDUSTRIALES ECOLOGICOS	Nº	9.635	8.886	5.825	8,43%	65,41%
Nº Establecimientos por industria ecológica	Nº	1,84	1,92	1,67	-4,07%	10,12%
-Centrales hortofrutícolas	Nº	1.329	1.205	1.785	10,29%	-25,55%
-Conservas vegetales y hortalizas	Nº	1.234	1.103	841	11,87%	47,33%
-Bodegas y envasadoras	Nº	1.152	1.033	969	11,52%	18,89%
-Almazaras y remojadoras	Nº	1.054	993	793	6,55%	32,91%
-Cereales y derivados	Nº	1.048	999	799	5,99%	32,41%
-Alimentación infantil y afines	Nº	745	695	545	7,20%	36,51%
-Manipulación frutos secos	Nº	460	427	327	7,73%	41,28%
-Industrias cárnicas	Nº	540	469	349	15,14%	54,73%
-Industrias lácteas	Nº	205	175	125	17,14%	64,00%
-Comercializadoras de huevos	Nº	185	170	120	8,82%	55,00%
-Envasadoras de miel	Nº	162	167	117	-3,00%	38,41%
-Conservas de pescado	Nº	85	70	50	21,43%	70,00%
-Fábricas de piensos	Nº	127	173	123	-26,59%	3,25%

Fuente: MAPA

Tabla I.3. ESTRUCTURA PRODUCTIVA PRIMARIA: SUPERFICIE ECOLOGICA (2)

MAGNITUDES Y RATIOS (Miles de Hectáreas)	2019	2018	Variación 2019/2018 (%)	% s/Superficie Ecológica Total en 2019
SUPERFICIE ECOLOGICA TOTAL	2.354,92	2.246,42	4,83%	100,00%
Prados y pastos	1.254,30	1.186,90	5,68%	53,26%
Cereales	211,76	204,78	3,41%	8,99%
Olivar	209,29	200,13	4,58%	8,89%
Frutos total	202,26	185,74	8,95%	8,58%
Viñedo	121,29	113,42	6,94%	5,15%
Legumbres secas	35,91	34,46	4,21%	1,52%
Forrajes	32,35	33,52	-3,49%	1,37%
Cultivos industriales	23,03	23,12	-0,39%	0,98%
Hortalizas frescas	22,23	22,31	-0,36%	0,94%
Otros cultivos	76,23	75,44	1,05%	3,24%
Barbechos	166,17	166,6	-0,26%	7,06%

Fuente: MAPA

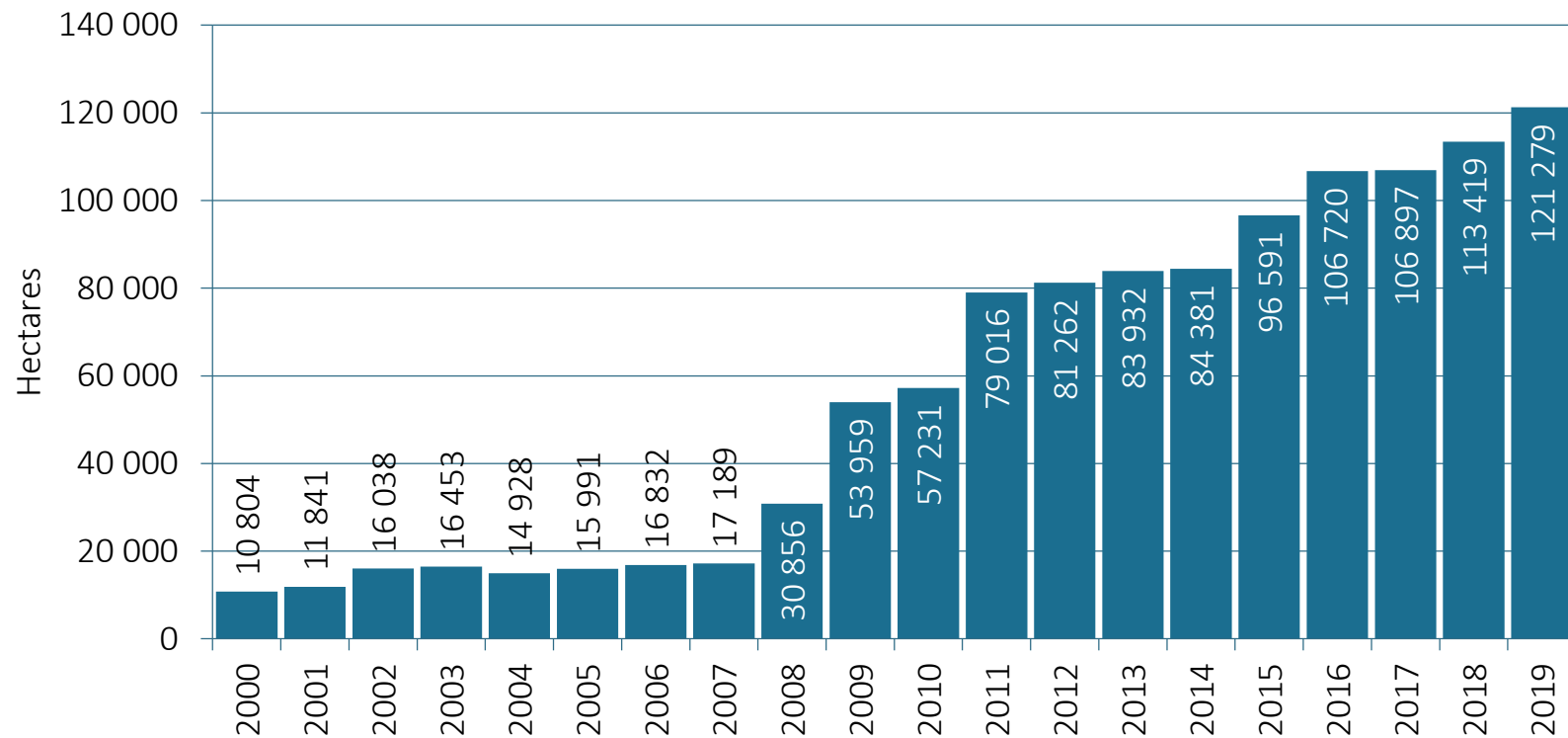
Surface and production in Spain 2019

COMUNIDAD AUTÓNOMA	VIÑEDO PARA VINO INSCRITO EN AGRICULTURA ECOLÓGICA (ha)	PRODUCCIÓN ESTIMADA (Tm)	Nº BODEGAS Y EMBOTELLADORAS
ANDALUCÍA	1.064,04	3.559,29	102
ARAGÓN	1.747,40	4.231,78	28
ASTURIAS	0,52	4,15	0
BALEARES	818,34	3.468,92	30
CANARIAS	411,00	2.064,00	27
CANTABRIA	4,92	34,42	2
CASTILLA Y LEÓN	6.850,16	26.881,96	117
CASTILLA-LA MANCHA	1 61.211,79	1 223.128,87	2 213
CATALUÑA	2 18.627,38	2 76.421,89	1 273
COMUNIDAD VALENCIANA	3 12.713,87	3 40.103,11	3 141
EXTREMADURA	1.681,57	4.545,09	14
GALICIA	69,77	458,71	19
LA RIOJA	1.085,91	7.058,41	62
MADRID	570,04	798,50	9
MURCIA	11.691,47	39.300,00	52
NAVARRA	1.395,77	3.425,96	28
PAÍS VASCO	929,91	5.578,70	35
TOTAL ESPAÑA	120.873,84	441.063,76	1.152

Spain: Development of the organic grape area 2000-2019

Spain: Development of the organic grape area 2000-2019 (including in-conversion areas)

Source: MAPA 1999-2021



Source: FIBL

Share organic from total surface vineyards



Tendencies

- Increase of organic wines production/consumption
- Climate change: dryer areas less humidity and pests.
- Drink less, drink better.
- Beyond the organic production: natural, biodynamic wines or regenerative agriculture (small in figures).

Biodynamic production

Table 1 Demeter-certified vineyards worldwide

Country	Number of farms with grapes for wine*	Area (hectares) with grapes for wine	Average hectares/farm
Certified by DI members			
Austria	34	348	10.2
Belgium	1		
Brazil	1	19	
France	286	4,706	16.5
Germany	54	218	4
Italy	74	1,303	17.6
The Netherlands	2	1	0.5
New Zealand	8	241	30.1
Slovenia	9	69	7.7
Spain	33	1,014	30.7
Switzerland	37	215	5.8
UK	6	35	5.8
USA	58	1,314	22.7
Certified by DI (ICO)			
Argentina	9	312	34.7
Chile	17	1,224	72
Czech Republic	1	53	
Greece	1	5	
Hungary	3	11	3.7
Mexico	1	4	
Portugal	1	3	
South Africa	3	93	31
Total	639	11,188	

Notes: *Demeter certification and "in conversion" certification. Data courtesy of Demeter-International data. Statistics of biodynamic winegrowers worldwide. Not all farms included here are certified as biodynamic. Some of them are in conversion.

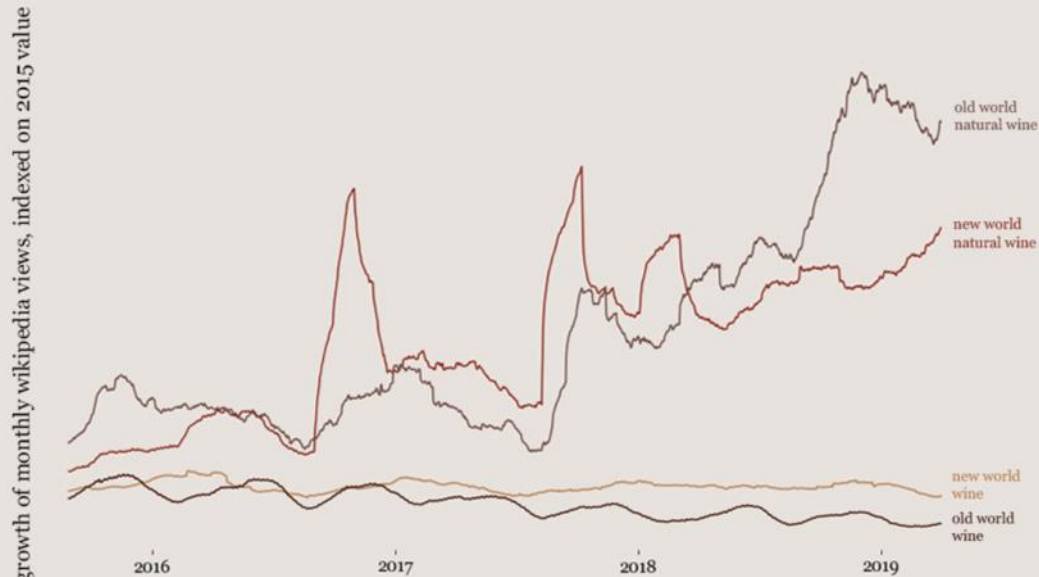
Abbreviations: DI, Demeter International; ICO, International Certification Office.

- Mainly small producers
- Intensive vineyard care
- Less production
- Increase of production costs

Natural wines

Natural wine interest has grown faster than wine interest, according to Wikipedia page views.

Old World natural wine interest has experienced a recent spike in growth.
New World natural wine interest appears generally spikey.

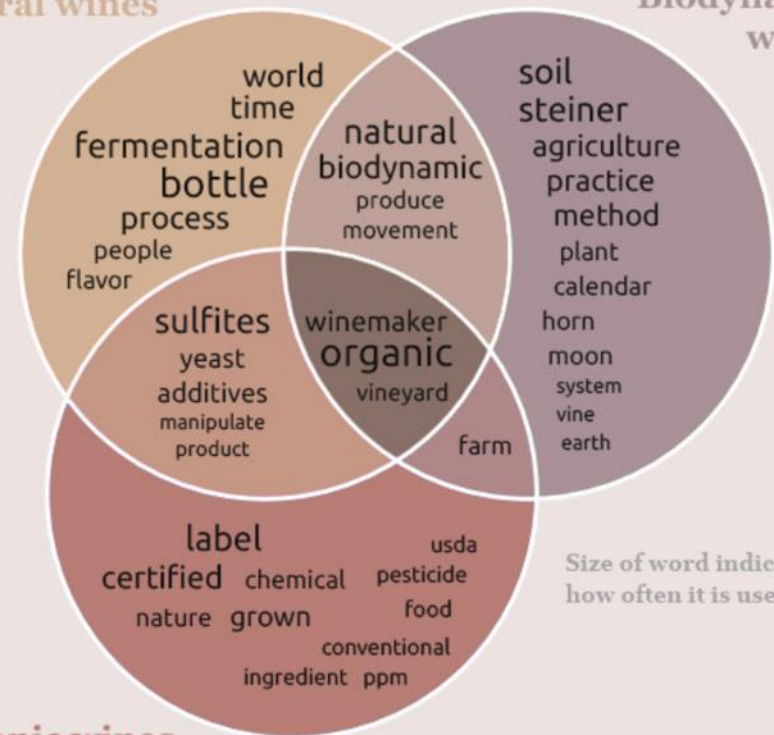


Source: Wikipedia page views, broken out by language (proxy for country) and wine type

Wine style descriptions have **significant overlap** when we look at the top 20 descriptors used in blogs.

Natural wines

Biodynamic wines



Size of word indicates how often it is used.

Organic wines

Source: 60+ blogs and websites describing each style of wine

Source: Wineandthehill.com



REGENERATIVE VITICULTURE: SOILS ALIVE AGAINST CLIMATE CHANGE

(Image taken from regenerative viticulture 1st symposium in Spain, 2021)

Thank you!