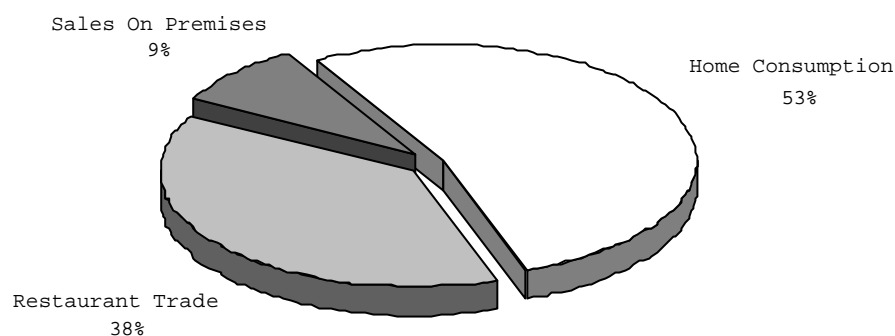


### 3. The Austrian Market

#### 3.1 Market Segments



Source: Bacchus Study "2000", 1994

In the study "Bacchus 2000" the share of the marketing segment was projected, based on domestic consumption, by the Kontrast company with the aid of Nielsen and GfK figures. It is important to note that no reliable data are available from the restaurant trade for calculating the absolute value of the hotel restaurant catering (horeca) marketing segment.

#### 3.2 Domestic Consumption

##### 3.2.1 Domestic Wine Consumption

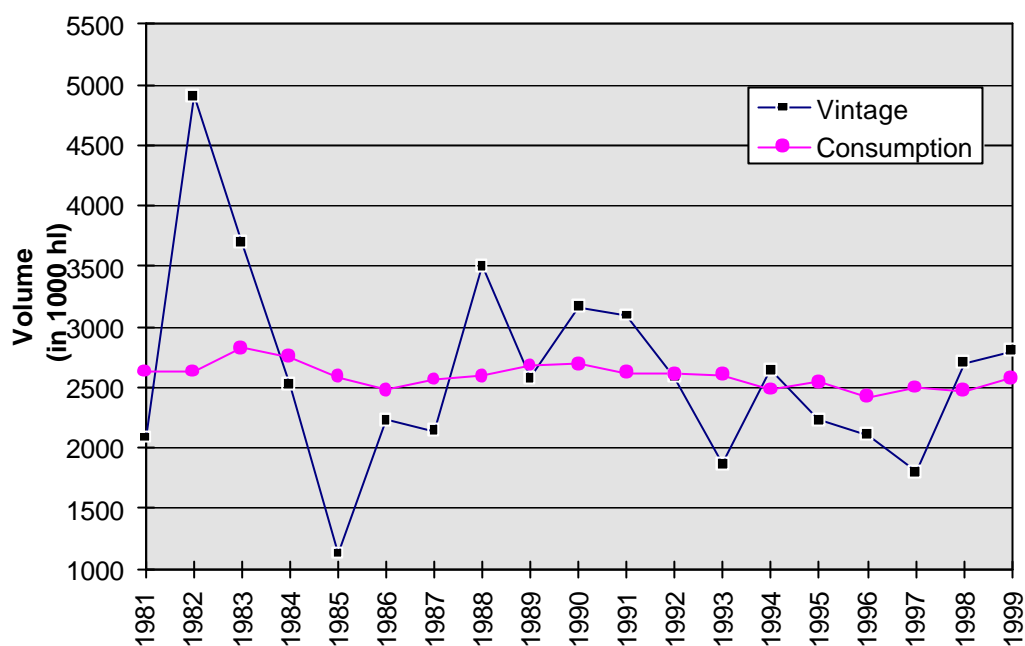
Consumption from 1981 to 2000

Year	Consump. in hl	Year	Consump. in hl	Year	Consump. in hl
1981	2,635,389	1988	2,595,399	1995	2,544,524
1982	2,631,575	1989	2,681,468	1996	2,567,448
1983	2,823,525	1990	2,689,330	1997	2,545,000
1984	2,750,855	1991	2,619,000	1998	2,750,000
1985	2,588,095	1992	2,608,332	1999	2,575,025
1986	2,476,437	1993	2,604,317	2000	no figure available
1987	2,565,621	1994	2,483,102		

Source: STATISTICS AUSTRIA, "Balance of Supply"

Over the last two decades, domestic wine consumption has remained essentially stable. Fluctuations have been more the cause of price and tax changes than a reflection of changes in consumer trends.

### Vintage and wine consumption 1981-1999 in Austria



Source: STATISTICS AUSTRIA

### 3.2.2 Domestic Consumption of Sparkling Wine

Year	Consumption in litres	Consumption in 0.75 l bottles
2000	14,625,000	19,500,000
1999	18,545,000	24,726,667
1998	15,280,000	20,373,334
1997	16,525,000	22,033,333
1996	16,100,000	21,466,666
1995	14,405,556	19,207,406
1994	11,186,111	14,914,816
1993	13,674,998	18,233,333
1992	11,041,669	14,722,223
1991	18,629,170	24,838,890
1990	14,045,834	18,727,778

Source: Association of the Austrian Sparkling Wine Industry, 2001

In 1999 sparkling-wine consumption grew at an unexpectedly rapid pace because of the “millennium effect”.

## 3.2.3 Per-capita Alcohol Consumption 1999

	Spirits (litres of pure alcohol)	Beer (litres) *	Wine (litres) **
1961	2.15	77.3	20.8
1962	2.30	80.2	22.1
1963	appr. 2.3	85.2	22.5
1964	2.00	89.9	26.0
1965	2.20	92.1	29.8
1966	1.90	98.8	31.6
1967	1.84	102.6	31.9
1968	1.96	98.2	33.4
1969	1.20	99.0	33.5
1970	1.40	98.7	34.6
1971	2.28	101.8	35.9
1972	2.36	103.7	35.5
1973	appr. 2.3	110.1	36.8
1974	1.96	105.4	35.4
1975	1.65	103.8	35.1
1976	1.70	102.0	36.3
1977	1.70	103.1	36.1
1978	1.37	100.9	35.0
1979	1.56	103.9	35.8
1980	1.59	101.9	35.8
1981	1.51	104.8	35.1
1982	1.52	108.5	35.3
1983	1.55	109.4	37.4
1984	1.48	107.7	36.4
1985	1.46	111.6	34.3
1986	appr. 1.45	118.5	32.8
1987	appr. 1.45	118.3	33.9
1988	appr. 1.45	117.8	34.2
1989	appr. 1.45	119.3	35.2
1990	1.51	121.3	35.0
1991	1.74	123.9	33.7
1992	1.26	122.2	33.1
1993	1.50	116.7	34.3
1994	1.40	116.6	32.8
1995	1.50	115.6	32.0
1996	1.50	114.0	31.5
1997	1.5 ***	113.3	37.8
1998	1.4 ***	108.6	34.3

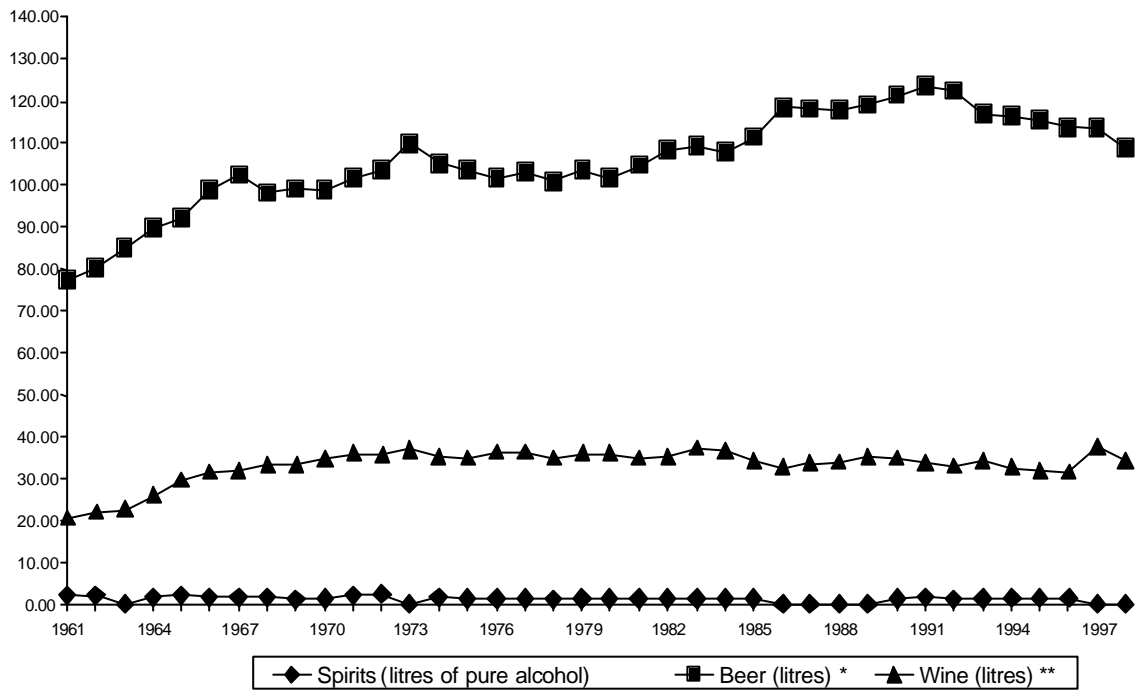
\* Figures include light and alcohol-free beer

\*\* From 1 July to 30 June

\*\*\* Estimated figure

\*\*\*\* no current data available

Source:  
World Drink Trends 1999  
OIV 2000

**Chart: Beer, Wine and Spirit Consumption in Austria 1961-1998 in litres**

Source: World Drink Trends 1999  
and OIV 2000\*  
Chart: AWMB

\* no current data available

### 3.3 Austria's Foreign Trade in Wine – The Most Important Markets

#### Volume and Value of Austrian Wine Exports

Within the EU all STATISTICS AUSTRIA data are based purely on statistical reports by the “exporters” – the *Intrastat* reports. *Intrastat* reports now have to be made by exporters if their annual turnover equals or exceeds EUR 145,345.67 (until the end of 1998: EUR 109,009.25). Small shipments and so-called car “boot” or “trunk” exports were not recorded, thus the statistics are not completely reliable. The threshold for the reporting varies from EU state to state. In Germany, for example, it is EUR 200,000. A comparison of import and export figures from the various EU states does not appear to be meaningful.

**Thus the import and export figures are also not necessarily consistent with the various sources.**

#### The most important markets

\*) in 1000 EURO

	2000	Ranking	1999	Ranking	1998	Ranking	1997	Ranking
Germany	28,499.74	1	25,587.74	1	32,614.19	1	21,656.80	1
Switzerland	2,701.90	2	1,680.27	4	1,189.51	4	1,162.69	5
United States	2,057.08	3	1,858.39	2	1,070.69	5	596.43	9
Netherlands	1,029.63	4	241.49	14	1,261.24	3	508.42	10
Czech Republic	1,009.72	5	1,822.34	3	657.98	8	1,365.60	3
Liechtenstein	561.98	6	724.18	7	475.13	9	395.99	11
Japan	524.99	7	763.50	6	983.99	6	714.45	8
Slovakia	505.73	8	138.44	17	34.23	25	17.66	29
Italy	447.66	9	1,354.69	5	11,006.01	2	723.39	7
Sweden	393.81	10	716.19	8	697.37	7	1,216.03	4
United Kingdom	354.28	11	267.94	13	276.08	14	377.32	12
Taiwan	264.17	12	312.28	11	417.51	11	1,480.56	2
Canada	219.33	13	432.04	9	278.99	13	232.77	13
Norway	219.11	14	118.31	18	83.43	19	150.72	14
Belgium	177.18	15	268.60	12	206.54	15	133.21	18
Poland	169.11	16	396.72	10	429.50	10	778.54	6
France	141.20	17	88.73	22	98.25	17	101.52	19
Macedonia	114.02	18	26.02	28	3.78	43	0.00	--
Thailand	95.49	19	156.46	16	103.99	16	80.96	21
Australia	77.25	20	24.27	30	32.78	27	60.90	23

\*) in litres

	2000	Ranking	1999	Ranking	1998	Ranking	1997	Ranking
Germany	27,360,409	1	19,097,124	1	16,902,300	1	13,397,112	1
Czech Republic	4,040,943	2	5,514,424	2	1,694,247	2	2,373,500	2
Slovakia	1,779,846	3	310,259	5	9,761	24	7,035	26
Netherlands	713,339	4	53,453	17	557,029	4	344,827	5
Switzerland	429,596	5	286,692	6	248,734	8	245,156	6
United States	280,938	6	232,222	7	153,732	10	112,081	12
Liechtenstein	163,460	7	108,513	11	92,969	11	78,811	14
Sweden	157,065	8	368,320	4	478,263	6	862,930	4
Italy	143,169	9	118,950	10	1,101,905	3	129,227	10
Poland	142,230	10	447,427	3	478,570	5	1,131,653	3
Japan	94,150	11	171,624	9	239,123	9	185,671	8
Thailand	78,754	12	103,659	12	72,948	14	66,805	16
Belgium	71,637	13	91,895	13	77,323	13	78,054	15
Canada	51,915	14	200,071	8	79,075	12	62,272	17
United Kingdom	50,950	15	82,771	14	72,644	15	116,634	11
Lithuania	44,535	16	22,240	20	0	x	0	x
Norway	36,541	17	17,539	24	9,436	25	23,287	23
Taiwan	30,003	18	37,046	18	62,021	16	167,931	9
Turkey	22,837	19	168	61	202	54	0	x
Australia	15,371	20	9,010	29	7,070	26	6,328	28

\*) Ranking according to the last year under review