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Wine

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Report Highlights:
U.S. wine exports to Germany are reaching new record levels in CY 2004. During the first eight months of 2004, American exporters shipped 325,000 hectoliters to Germany, 7 percent more than during the same period in CY 2003. Growth took place in bulk shipments. Actually, bottled shipments lost market shares.
German vintners harvested a significantly bigger grape crop for wine production in 2004. Quality is expected to be normal or better. Prices for bulk wine are falling as result of the good crop in Germany and other European countries.
Per capita wine consumption is calculated at 19.8 liters.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Berlin [GM1]
[GM]

Table of Contents

Executive Summary

In 2004, German vintners are expected to harvest 10.5 to 11.0 million hectoliters (hl) of grape must, which is 25 to 30 percent larger than the unusually short crop in 2003. First reports indicate that this years wine quality will be in a normal to better than normal range. The 2003 wine has been of excellent quality, a so-called century wine.

Grapes for wine are harvested from a productive area of 98,300 hectares, which are spread over 13 different wine growing regions. The predominant wine regions are in the states of Rheinland-Pfalz, Baden-Wuerttemberg and Hessen. Due to climate and geography, German wine production can vary significantly in quality and quantity from year to year. However, strict maximum harvest regulations based on the EU wine regime should limit fluctuations in annual production.

Germany is predominantly a white wine region with 65.7 percent white wine areas. However, due to consumer preferences, vintners are gradually switching over to produce more and more red wines. In 1991, only 20 percent of the grapes were of red varieties compared to 34.3 percent now. About 50 percent of the re-plantings are currently in red wine varieties. Based on area, Germany is the 15th largest wine grape producing country in the world and ranked seventh in 2002 in terms of wine production, just recently surpassed by Australia.

Total calculated wine consumption in MY 2002/2003 (Aug/Jul) is estimated at 19.5 million hl, 58 percent sourced from imports. Germany is actually the world's biggest importer of wine, predominantly from other EU countries. U.S. exports of mostly high quality red wines are growing strongly. Total U.S. wine shipments to Germany amounted to 450,600 hl in CY 2003 compared to 303,400 hl in 2002. On a value basis, the U.S. had been the largest non-EU supplier of wine in Germany until CY 2003. During the first eight months of 2004, suppliers from Chile and Australia have successfully expanded their market share to the same level as those from the United States. Due to the strengthening of the Euro versus the dollar, New World wine shipments to Germany continue to grow fast in 2004.

In CY 2003, Germany exported about 2.7 million hl of wine, mainly to other EU countries. However, about 6.5 percent of German exports are to the United States, or 176,900 hl. In its export markets, Germany is strongly promoting Riesling wine for the medium and higher price segments. The German Wine Institute spent about Euro 3.67 million ($3.29 million) in export promotions in CY 2001.

Note: In recent years the U.S.$/EURO exchange rate has been as follows:

1998: $1 = Euro 0.8990	2001: $1 = Euro 1.1166
1999: $1 = Euro 0.9383	2002: $1 = Euro 1.0575
2000: $1 = Euro 1.0827	2003: $1 = Euro 0.8840
	Sep 2004: $1 = Euro 0.8185

Production

In the fall of 2004, German vintners harvested about 10.5 to 11.0 million hl of grape must, which is about 2 million hl more than in drought-stricken 2003. The quality of the 2004 wine is expected to be normal or better.

Germany is the EU's 6th largest wine producing region with 102,489 hectares under wine grape cultivation in 2003 but also the world's 7th largest wine producer with an annual production of around ten million hectoliters. There are 13 different growing regions in Germany. The names of these regions are used for region of origin labeling. The commercial production of wine outside of these designated regions is not permitted. Based on the rules of the EU wine regime, the German wine law allows regional authorities to stipulate which grape varieties can be produced in the production regions. In 2003, 66 percent of grapes produced in Germany were of white wine varieties. Five years ago, white wine vines covered 77.4 percent of German wine production area. The leading Riesling and Mueller-Thurgau varieties are grown on about 36 percent of the grape area. Of growing popularity are White Burgundy, Chardonnay and Rulaender grapes with the largest decrease in the Mueller-Thurgau variety. Red wine is only planted in about 34 percent of the grape area, but its production area is growing by about 1,500 to 2,500 hectares every year. The most favored red grape varieties are Blue Burgundy, Dornfelder, and Blue Portugese. For re-plantings, the most favored grapes during the past five years were the Dornfelder and Blue Burgundy varieties (see Table 3.)

To assist vintners better meet consumer demand, the EU offers a restructuring program for vineyards. During MY 2003/04 (Aug/Jul) the EU subsidized the unrooting of unwanted grape varieties in Germany and the subsequent replanting with modern varieties valued at Euro 14 million (U.S.$ 12.4 million). For MY 2004/05, the EU granted restructuring subsidies of Euro 12.7 million for a restructuring area of 1,971 hectares. This program is available to all the wine-producing countries within the EU. Under this program, a total of 2,116 ha in Germany were replanted with new grape varieties other than Mueller-Thurgau, Kerner, Bacchus, Morio-Muskat or other high yielding varieties, which are of little interest to the consumer. Also, subsidized replanting with the high yielding red Dornfelder variety was stopped in MY 2001/02 since this could risk meeting maximum yield limits stipulated by production region and quality level. In MY 2002/03, the EU provided Euro 12.5 million (U.S.$ 11.8 million) for the restructuring of 2,100 hectares of grape area in Germany. The total annual replanting rate is estimated at about 4 percent since plants are kept in production for 20 to 25 years.

Four consecutive years of smaller wine production led to price increases in 2003 versus 2002. In particular, vintners selling their wine in bulk experienced highest profit gains. However, this group of vintners was also the group with highest losses in previous years. On the contrary, direct marketing vintners experienced income reductions in 2002/03 since they face increasing competition through low price wine offers in food retail outlets. Total bulk wine sales represent about 40 percent of German wine production. Vintners who market their wine directly do not face the enormous prices fluctuations from year to year that bulk wine marketers do - growing grapes is simple, but making and marketing a good wine is a science. During previous years, producers of bulk white wine seemed to have problems selling their product to mass producers of sparkling wines. These companies still prefer to import their raw wine from low-priced Mediterranean and eastern European sources. The majority of the bulk wines is purchased by mass bottlers for sale in discount stores. The disadvantages faced by domestic vintners are their small operation size and consequent inability to offer sufficient volume for sale in retail chains. However, for direct marketers small size may also be a helpful marketing tool.

Good wine harvests in Germany and other European countries in 2004 are again leading to price reductions for bulk wine. Actually, prices for the Dornfelder, Germany's shooting star for the past seven years in the red wine category, have already dropped by about 30 percent compared to fall 2003. Wine experts fear that the enormous marketing power of the food retail chains will lead to further price reduction for all types of wines.

Consumption

The economic situation in Germany has not yet significantly improved from 2002 and 2003. After stagnant growth in 2003, GDP growth for 2004 is expected at 1.5 to 1.8 percent. Due to the current strength of the Euro versus the U.S. dollar and the high crude oil prices, the outlook for the German economy in 2005 is darkening again. Germany is strongly dependant on export markets. With domestic budget deficits rising, public spending will not inspire additional growth. Unemployment is also approaching the 11 percent level without any clear indication for improvement. As a consequence of this pessimistic economic environment, the private savings rate has increased by one percentage point over the past four years to 11 percent of the disposable income. Consequently, spending in certain segments of the retail sector and in the hotel and restaurant sectors has been on the decline. Turnover in the hotel and restaurant sector dropped by about five percent in 2003. Data for the first half of 2004 indicate a slight recovery of 1.5 percent.

However, German wine consumption by volume had not been affected by these negative economic conditions. Wine consumption grew while demand for all other alcoholic beverages decreased. Wine has been gaining popularity since it has a positive-image among German consumers (see Table 4). In 2001, German consumers for the first time in history spent more money on wine than on beer. Good quality combined with interestingly designed bottles and labels makes wine attractive to all alcohol beverage consuming age classes. Per capita consumption in 2003 was estimated at about 19.8 liters. This number does not include sparkling wine, which lost about twenty percent of its consumption after the millennium year. In 2003, a consumer panel revealed that 67.5 percent of the German households are at least irregularly buying wine. Although this is the lowest level during the past four years, it indicates that the vast majority of Germans appreciate having at least an occasional glass of wine.

A recent consumer panel revealed that retail demand for wine is still increasing. During the first quarter of 2004, sales dropped by 2 percent but recovered during the second quarter by 3 percent. Also the number of individuals purchasing wine is increasing again by 1 percent. Retail prices in contrast are trending downward, reflecting the difficult economic situation and the extreme price competitiveness of the German food retail market in general. The beverage industry reports rising demand for alcoholic pre-mixed alcoholic drinks, in particular, by young customers.

The major beneficiaries in the long-term positive trend for wines are red wines in general and New World wines in particular, with a share of 11.4 percent of all German wine imports in 2003. As a result, the market share of German wines has actually dropped under 50 percent to 46.2 percent, to the dismay of the average German vintner (Table 5). Actually, in 2003 German wine regained a fraction of its lost market share, a trend, which continued into the first half of 2004. Recent market reports indicate that the winner in the 2004 German wine market is German white wine. This reverses the longer-term trend favoring red wines.

One of the reasons for the longer-term decline of the market share for German wines was the relatively low German wine production of the past four years but also the strong consumer preference for red wines. Despite recent re-planting of red wine varieties, Germany is still predominantly a white wine producing country. Consumption of red and rose wines, which cover 58.8 percent of the German wine market, are predominantly coming from imported sources. By converting their vineyards to red wine varieties, German vintners intend to participate in this popular red wine trend.

Some hindrances faced by the German wine industry are the fragmented production structure (about 67,000 vineyards) and the complicated German wine grading and labeling system, which is not fully understood by many customers (see GAIN Report GM9069). Because of its diversified structure, the German wine industry has difficulties to provide the increasingly concentrated retail trade with sufficient quantity of uniform types of wine. The large number of small vintners in particular, limits the marketing opportunities since discounters handle about 45 percent of total wine sales in Germany; another 22 percent is sold through super markets with only 17 percent sold directly by the vintners and wine cooperatives, see Table 4. Of the domestic wine sold in Germany, close to 40 percent is sold directly by the producer or producer cooperative to the consumer while about 85 percent of the imported wines are marketed through food stores, discounters and super markets. Only 7 percent of imported wines is traded by specialized stores and 5 percent are sold through restaurants and hotels.

To better position domestic wines on the retail shelves, the German Wine Institute has developed two new wine categories, 'Classic' and 'Selection' type wines (see GAIN Report GM0041). Vintners contract with the German Wine Institute for the use of the Classic and Selection label. The German Wine Institute controls the production methods and the quality of the wine sold under this label. In 2001, the first Classic type wines were put on the market, somewhere around 20,000 to 30,000 hl. In CY 2004, the market penetration of 'Classic' labeled wines is rather limited with an estimated volume of only 120,000 hl, which is 1.04 percent of total German wine production. The Classic line specifically aims to improve the quality of bulk wine and in the longer term the image of German wines. It focuses exclusively on dry wines. The target price range for Classic wines is between EUR 3.50 and EUR 5.00 per bottle of 0.75 liters. The target price for Selection wines is between EUR 7.50 and EUR 15.00. The target of this campaign is not only the domestic market. The Germans also intend to promote the Classic and Selection label in their export markets.

A closer look at actual consumption trends tells us that German consumers switched from higher price purchasing locations to price aggressive food discount chains during recent years – see Table 4. Discount stores have been the great winner in the wine retail market, handling about 45 percent of all wine retail sales in 2003, which is 50 percent more than seven years ago. Supermarkets were able to retain their market shares at 22 to 23 percent. Self-marketing vintners and coops experienced market share losses of about 4 percent. They still handle about 17 percent of all retail wines. The big losers in this market are the specialty stores who lost more than have of their wine sales.

With the success of the food retailers, average retail prices for wine dropped by 5 percent over the past seven years. Price reductions for imported wines were much stronger than for German wines. This is due to the difference in trade channels for domestic versus imported wines. According the German Wine Institute about 35 percent of all domestic wines are sold directly to the customers. However, this represents 45 percent of the traded value. Direct producer customer contact generates the willingness to pay higher prices. These wines do not have to compete with price aggressive food retailers. Many vintners developed a long-term delivery relationship with their customers, which is expressed in high prices and reliable quality. Also in high-priced specialty stores, the market share of German wines ranges at about 50 percent. Prices for German wines marketed through discounters are actually somewhat lower than those for imported wines. However, in 2003, some retailers sold German red wines at higher prices than imported red wines. Below average prices are primarily paid for wines from France and Italy. Wines from Spain and the New World countries in supermarkets and discount stores generated higher prices. These countries supply primarily red wines.

The share of imported wine sold at retail prices of less than Euro 2.50 per liter amounted to 58 percent in 2003 but only 36 percent of German wine was in this low price group. The most important price group for German wine is Euro 2.50 to 5.00 accounting for 51 percent. The upper price segment of more than Euro 5.00 per liter accounts for 10 percent of the imported wines and 13 percent of the German wines. Unfortunately the available statistics

do not separately list New World wines. However, market reports indicate that the big winners in the wine market, the New World wines, are generally selling at above average prices.
Specialty stores, which sell about 4 percent of all retailed wines provide a different price picture. Here wines from France and Italy receive significantly higher prices. There is no special price differentiation by region of origin. Direct wine purchases through the internet from abroad remains relatively small at only 1 percent of the market.

The Lebensmittelzeitung, a weekly food retail magazine, argues that the positive trend in wine sales in Germany over the past several years did hide a development, which can be dangerous for the local wine industry. The growing market power of the food retail chain hindered the development and launching of new wine brands sold through super markets or specialty stores, which usually offer a much wider variety of wines than discount chains. Food discounters have developed a very good reputation with German customers and possess excellent marketing experts who know what their customer wish to buy. As there is sufficient volume of good wine available on the global wine market, these discounters managed to select and purchase the desired wine and have it imported in bulk and bottled locally. The discounters have a clear understanding what types of wines with clearly defined characteristics are in demand. Their customers expect to always get the 'same' product. They do not necessarily care what brand name is labeled on the product; they are more and more willing to buy generic products or discount brands. The trend in this market goes in the direction to 2-Euro-bottles. Consequently, the raw wine has to be offered at a very low price.

Looking at the wine consumption by region within Germany, it is noticeable that people in the eastern part of the country consume significantly less wine than the more affluent population in western Germany. However, more wealthy clusters in and around the city of Leipzig and along the coastline to the Baltic Sea may be worthwhile for additional marketing efforts.

With respect to taste, German consumer preference for dry and semi-dry wines is steadily growing. Data for CY 2000 indicate that 54.4 percent of the German quality label wines were of the dry/semi-dry market segment, compared to 35.9 percent fifteen years before.

Favorite bottling size for Germany is the 0.75 liter bottle. Wines sold in one liter bottles are often of the lower price segment or sold directly through the vintners. About 94 percent of German wines are in glass bottles, of which about 27 percent are returnable. The industry has recently looked into packaging alternatives for glass bottles and also tested PET (plastic) bottles but came to the result that PET is not a packaging alternative for wine in Germany. An alternative to the glass bottle is the five-liter bag-in-the-box system, which is frequently used for French wines.

Sparkling wine consumption in Germany reached a high in 1999 due to the millennium celebration. Demand for sparkling wine, including champagne, has fallen to 3.9 liters per capita in 2002. Reports for 2003 do not show a turnaround of this negative trend.

Much of this information was extracted from market reports of the Deutsches Weininstitut.

Trade

Germany is the world's most important import market for wine. About 62 percent of Germany's wine consumption is of imported wine. Total imports in CY 2003 decreased by 5 percent to 12.7 million hl. However, during the first eight months of 2004, total wine imports increased again by about 10 percent – see Table 9 of the Statistical Section.

According to official German trade statistics, the drop in imports in 2003 occurred predominantly in imports from other EU countries. Particularly imports from Italy dropped by 17 percent. A recovery of imports from Italy to 2001 levels is reported for 2004. The big winner from the EU on the German market has been Spain during the past four years. This positive trend continued also in 2004. Imports from southeastern European countries such as Bulgaria, Macedonia, and Romania are marketed at very low prices, below 50 percent of normal import prices. These countries exported about 600,000 hectoliters of wine to Germany in 2003.

Of significantly growing importance to the German wine trade are New World wines, which already make up 13.3 percent of all German wine imports, compared to 4 percent in 1999. While prices for U.S., Australian, Argentine and South African wines are noticeably above the average import price, Chilean wine is marketed relatively price aggressive. Average prices for wines from the United States have been falling during the past five years, which is a result of the shift from shipments of bottled wine to bulk shipments. The strength of the Euro currency versus the US dollar makes it possible that more U.S. wines can be marketed through the mass retail system.

The total market share of the 5 New World countries increased to about 7 percent in 2003 compared to about 5 percent in 2002. A further increase to about 9 percent is forecast for 2004. U.S. (mainly California) and other New World wines have increasingly captured space on many of the retail shelves. They are no longer exotic products. Most important, they are selling at above average prices (except for Chile) and are of wine varieties that are popular with German consumers. About 80 percent of the imported U.S. wines are red wines, of mostly high quality. While U.S. red wine shipments to Germany make up for 5,4 percent of total red wine import volume, the value of these imports adds up to 6 percent making the U.S. the largest non-EU supplier of wine on value basis. California wines are relatively well known in Germany and German consumers expect high quality when they purchase California wines. Wines from other regions or states in the U.S. are not yet well known. Total U.S. wine exports to Germany amounted to 451,000 hl in CY 2003; further growth of about 8 to 10 percent is reported for 2004 (see Table 7 ff.). The increase of U.S. shipments particularly took place in the area of bulk wine shipments, up 150 percent to 186,000 hectoliters in CY 2003. Shipments of higher priced bottled wines grew to 268,000 hectoliters in CY 2003. Trade numbers for 2004 indicate that bottled wine shipments dropped noticeably to an estimated 185,000 hl.

German wine exports amount to 20 to 25 percent of domestic production. In 2003, these were 2.7 million hl. The leading markets are the United Kingdom and the Netherlands followed by the United States. Germany is working hard to improve its image as a supplier of quality wines. The export marketing focus is on dry Riesling wine. The German Wine Institute spends about EUR 3.5 million annually for export promotions.

Stocks

German wine stocks dropped slightly to 14.3 million hl by the end of July 2003 due to the smaller grape harvest in 2002. This stock level represents about 140 percent of a regular German harvest or about 72 percent of German annual consumption of wines. During MY 2002/03 (August/July) stock increases are reported for red wines because of the growing consumer preference for red wine. However, largest stocks are held in quality white wines at 9.7 mil hl. Low bulk wine prices indicate that stocks are still too high. In MY 2003/04, German vintners sold 7,300 hl of wine into the EU distillation program for drinking alcohol. No wine was distilled for industrial purposes.

Policy

The U.S. and EU continue to negotiate on several wine issues. These include the EU's acceptance of enological practices applied in the United States and the U.S. acceptance of EU geographic indicators. The U.S. acceptance of semi-generic regional names appears to be a major issue for the EU. The German wine producer's association indicated opposition to the possible agreement and demands that the International Wine Office (OIV) should become the only international standard setting organization. The German wine producers organization also suggests that the EU should approved all enological practices already approved by the OIV

Marketing

California wines have an excellent reputation in the German market and so far the consumers seem to be willing to pay an above average price. Other American wine growing regions should increasingly test the German market and take advantage of the good California reputation. Wines from the Mid-West have done some tastings / promotions in Germany during recent years. California wines have been very successful during recent years. However, since they are no longer a novelty in the German market, growth rates are likely to level off. They have to compete intensively with other New World wines, in particular wines from Chile, South Africa and Australia, which also have a good quality reputation. Also high quality wines from Romania and Bulgaria are foreseen to conquer the German market within the coming years. However, their great disadvantage is their image as low priced products.

The growing strength of the Euro versus the U.S. dollar during the past years has significantly improved the competitive situation for American wines. However, the generally difficult economic situation in Germany limits the opportunities to sell high value and high priced wines to the restaurant and hotel sectors. Companies are increasingly cutting back traveling and representation funds, which limits marketing opportunities in the high price market segment. Trade servicing efforts such as European storage, presentations, tastings and selling on commission will become a more important marketing tool to successfully compete with other New World and European suppliers.

On the lower end market segment, significantly increased bulk shipment of wines to Germany/Europe for bottling in the destination country has opened up marketing opportunities for U.S. wine placements on retail shelves. Price aggressive food discounters often use special sales to market special higher quality wines for a short period of one or two weeks. These special sales prices often range between EUR 5 to EUR 10 per 0.75 liter bottle.

Generic marketing for the German wine industry is conducted by the German Wine Institute, charged with marketing and promoting the quality of German wine within Germany and around the world. It receives most of its funds as royalties from German wine growers and processors. Overall, the German wine marketing strategy aims to improve the image of German wine, and promote German wine in the high and medium priced market segments. These promotional efforts have the potential to also generically support marketing opportunities of imported high quality wines. Promotional efforts are particularly targeting the lucrative medium-price segment of the wine market (between $5 and $9 per bottle), a segment in which German wines are under-represented. Besides the traditional export markets in Europe, North America and Japan, new markets in Eastern Europe, South America and Asia are also targeted.

German top politicians increasingly use German wines as an 'Ambassador' for Germany. Foreign Minister Fischer promoted German wine in New York. The Deutsches Weininstitut recently announced that they will be a major sponsor of the soccer world championship in Germany in 2006.

For marketing domestic wines, quality seals and wine awards have proven to be very helpful and efficient tools in wine marketing. Consumers feel confident when they identify such seals such as a golden or silver plaque of the Chamber of Agriculture or DLG quality seal (DLG = Deutsche Landwirtschaftsgesellschaft).

Helpful addresses for marketing wines in Germany and for general information about the German wine market are

California Wine Institute
Sabine Weyrich
Rheingaustrase 85
65203 Wiesbaden, Germany
Tel.: +49 611 9200 736
Fax: +49 611 9200 263
wineinstitute@weyrich-pr.de

Deutsches Weininstitut
Postfach (POBox) 1660
Gutenbergplatz 3-5
55006 Mainz, Germany
Tel.: +49 6131 2829 0
Fax +49 6131 2829 20
info@dwi-dwf.de
www.deutscheweine.de

The major international trade show for wine in Germany is the ProWein, held every Spring in Duesseldorf. Next show: Mar 6 - 8, 2004. ProWein is an excellent opportunity to meet importers, wholesalers, wine buyers, and media contacts; and to taste-test your wine against the competition. In 2004, about 2,700 exhibitors from 39 countries attracted about 30,000 expert visitors. In addition to individual U.S. exhibitors, California has a large Pavilion; also, a MIATCO organized Mid-West Wine Pavilion has become increasingly popular in recent years. Visiting ProWein would be a first step for U.S. exporters to market their wines in Germany; however, exhibiting at the show is more effective because it gives trade visitors a point of contact for questions and provides an opportunity to taste the wines. The next step would be wine tastings for wine buyers in various German cities.

ProWein - International Trade Fair Wines and Spirits
Messe Duesseldorf GmbH
Stockumer Kirchstrasse 61
40474 Duesseldorf, Germany
Tel.: +49 211 4560 01
Fax +49 211 4560 668
www.prowein.de
info@messe-duesseldorf.de

Another interesting regional trade fair is the Forum Vini held every November at the fairgrounds in Munich (Muenchen). Forum Vini is a consumer fair with 318 exhibitors, which attracted 9,300 visitors in November 2004, thereof about 85 percent private customers.

Forum Vini provides a good opportunity to test the German market in a large scale public tasting and selling environment.

Forum Vini
ALBRECHT, Gesellschaft fuer Fachausstellungen und Kongresse mbH
Oettingenstr. 25
80538 Muenchen
Tel.: +49 89 2729 4820
Fax: +49 89 2729 4822
www.forum-vini.de
Info@forum-vini.de

Statistical Section

Table 1: German Wine Production by Type and Quality, in 1,000 hl

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Calender Year	1998	1999	2000	2001	2002	2003*	2004*
White Wine	**7,936**	**9,042**	**6,819**	**6,071**	**6,364**	**5,397**	**6,900**
Table Wine	503	1,354	708	359	592	230	
Quality Wine	5,111	4,648	3,984	3,545	3,314	1,757	
Quality Wine w/ Spec. Attributes**	2,323	3,040	2,127	2,166	2,459	3,410	
Red Wine	**2,684**	**3,081**	**3,032**	**2,820**	**3,521**	**2,713**	**3,900**
Table Wine	26	33	69	25	31	18	
Quality Wine	2,436	2,706	2,736	2,539	3,216	1,854	
Quality Wine w/ Spec. Attributes	222	342	227	256	274	841	
Total Wine	**10,620**	**12,123**	**9,852**	**8,891**	**9,885**	**8,110**	**10,800**
Table Wine	529	1,387	777	384	623	248	
Quality Wine	7,547	7,354	6,720	6,085	6,530	3,611	
Quality Wine w/ Spec. Attributes	2,545	3,382	2,355	2,422	2,732	4,251	

* Preliminary
** Quality attributes shown on the label
Source: German Wine Growers' Association

Table 2: 'German Grape Must Production by Type and Quality, in 1,000 hl

Table 2: 'German Grape Most Production by Type and Quality, in 1,000 hl

Calender Year	1998	1999	2000	2001	2002	2003	2004*
White Wine	8,091	9,119	7,005	6,071	6,563	5,549	7,000
Red Wine	2,742	3,167	3,076	2,820	3,573	2,740	4,000
Total Wine	10,834	12,286	10,081	8,891	10,136	8,289	11,000

* Forecast
Source: German Wine Growers' Association

Table 3: Grape Variety Distribution, 1,000 hectares

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	1997	1998	1999	2000	2001	2002	2003
White Varieties	82,186	80,853	79,081	77,525	73,882	70,605	67,663
Riesling	22,774	22,631	22,355	22,118	21,514	21,053	20,770
Mueller-Thurgau	22,069	21,252	20,672	20,023	18,609	17,287	16,078
Silvaner	7,188	7,018	6,859	6,691	6,422	6,101	5,820
Kerner	7,263	7,011	6,828	6,543	6,054	5,557	5,053
Bacchus	3,396	3,316	3,282	3,209	2,967	2,756	2,516
Rulaender	2,538	2,565	2,637	2,769	2,905	3,146	3,433

Scheurebe	3,418	3,284	3,126	2,948	2,693	2,436	2,192
White Burgundy	2,029	2,165	2,396	2,593	2,795	2,984	3,105
Chardonnay		467	531	610	719	821	891
other white	11,511	11,144	10,936	10,021	9,204	8,464	7,805
Red Varieties	22,057	23,540	25,152	27,245	29,723	32,384	34,826
Blue Burgundy	7,745	8,204	8,643	9,255	9,806	10,637	11,022
Dornfelder	2,599	3,218	3,765	4,372	5,530	6,661	7,686
Blue Portogese	4,660	4,718	4,878	5,026	5,039	4,980	4,931
Trollinger	2,547	2,551	2,530	2,593	2,615	2,607	2,597
Black Riesling	2,187	2,228	2,289	2,405	2,481	2,518	2,514
other red	2,319	2,621	3,047	3,594	4,252	4,981	6,076
Total	104,243	104,393	104,233	104,770	103,605	102,989	102,489

Source: German Wine Growers' Association

Table 4: Wine Market Developments in Germany

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	Unit	1997	1998	1999	2000	2001	2002	2003
Wine Consuming Households	%	63.0	66.5	66.5	68.5	68.6	69.5	67.5
Market Share								
- German Wine	%	51.8	49.1	49.7	48.7	47.8	45.3	46.2
- Import Wine	%	48.2	50.9	50.3	51.3	52.2	54.7	53.8
- White Wine	%	48.8	47.8	46.7	43.3	41.1	41.2	40.0
- Red + Rosee Wine	%	51.2	52.2	53.3	56.7	58.9	58.8	60.0
- Wine in 0.75 l Bottles	%	48.3	49.1	51.1	52.2	51.8	49.0	49.0
- German Wine in 0.75 l Bottles	%	36.8	40.4	44.5	43.0	45.0	44.0	43.0
Average Prices								
- All Wine	EUR/l	3.02	2.97	3.10	3.11	3.21	2.94	2.87
- German Wine	EUR/l	3.27	3.35	3.35	3.32	3.48	3.36	3.21
- Imported Wine	EUR/l			2.85	2.73	2.68	2.60	2.58
- White Wine	EUR/l	3.00	2.86	2.92	2.92	3.05	2.77	2.72
- Red Wine	EUR/l			3.32	3.36	3.29	3.12	3.09
Trade Chanels								
- Vintners + Coops	%	20.8	19.5	19.3	18.7	19.0	18.3	17.1
- Super Markets	%	23.3	23.4	24.2	23.9	22.9	22.3	22.2
- Speciality Stores	%	7.7	6.3	7.4	7.2	5.6	4.7	3.7
- Discount Stores	%	30.8	35.3	35.8	37.2	39.0	43.1	45.2
- other	%	17.4	15.5	13.3	13.0	13.5	11.6	11.8

Source: German Wine Institute, Annual Report
www.deutscheweine.de Statistiken + Graphiken

Table 5: German Beverage Consumption, Liter per Capita

Table 5: German Beverage Consumption, Liter per Capita

	1996	1997	1998	1999	2000	2001	2002	2003
Alcoholic Beverage	161.3	160.3	156.3	156.3	154.4	152.2	151.6	147.0
- Beer	131.9	131.2	127.5	127.5	125.5	122.4	121.5	117.5
- Wine	18.3	18.1	18.1	18.0	19.0	19.8	20.3	19.8

- Sparkling Wine	4.8	4.9	4.7	4.9	4.1	4.2	3.9	3.8
- Spirits	6.3	6.1	6.0	5.9	5.8	5.8	5.9	5.9
Non-alcoholic Bev.	230.9	239.9	240.7	248.3	254.0	256.7	271.2	291.4
- Mineral Water	97.0	100.0	100.1	104.2	107.7	110.2	118.1	134.8
- Soft Drinks	92.7	98.7	99.6	103.7	105.7	106.2	112.8	114.6
- Fruit Juice	41.2	41.2	41.0	40.4	40.6	40.3	40.3	42.0
Hot Drinks + Other	278.7	273.3	275.1	277.3	275.8	276.6	320.7	322.1
- Coffee	163.5	160.0	159.1	159.4	158.9	159.2	156.3	153.5
- Coffee Substitute	3.3	3.4	3.2	3.0	3.0	3.0	3.1	
- Herbal Teas							45.8	49.8
- Black Tea	24.7	24.8	27.1	28.2	26.7	26.2	26.2	26.0
- Milk	87.2	85.1	85.7	86.7	87.2	88.2	89.3	92.8
Grand Total	670.9	673.5	672.1	681.9	684.2	685.5	743.5	760.5

Source: Ifo Institut Muenchen - Weinbauverband - Zahlen, Daten, Fakten

Table 6: German Wine PS+D - 1,000hl

Table 6: German Wine PS+D - 1,000hl			MY Aug/Jul		
	2000/01	2001/02	2002/03	2003/04* Estimate	2004/05* Forecast
Beg.Stocks	17,846	16,495	14,765	14,278	13,078
Production	9,950	8,980	9,984	8,110	11,500
Imports	11,616	12,434	12,056	12,800	12,500
Total Supply	39,412	37,909	36,805	35,188	37,078
Exports	2,569	2,509	2,703	2,600	2,800
Processing	607	600	450	10	10
Dom Wine Cons	19,741	20,035	19,374	19,500	20,000
Ending Stocks	16,495	14,765	14,278	13,078	14,268
Total Distrib	39,412	37,909	36,805	35,188	37,078
Per Capita Cons	23.9	24.3	23.5		

Source: German Vintners' Association

* Source FAS Bonn

Table 7: German Imports of Wine, 1,000 hl, Million Euro

Table 7: German Imports of Wine, 1,000 hl, Million Euro

	2001		2002		2003		Jan/Aug 2004*	
Quality White Wine	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro
Total	952.4	198.7	1,052.3	195.4	950.5	209.7	654.0	144.3
Intra-EU	948.9	198.0	1,052.2	195.4	950.5	209.7	654.0	144.3
Extra-EU	3.5	0.7	0.1	0.0	0.0	0.0	0.0	0.0
United States	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other White Wine								
Total	2,768.7	196.3	3,240.5	201.1	2,963.7	233.7	2,765.5	211.4
Intra-EU	2,325.6	139.7	2,762.2	143.3	2,386.8	159.2	2,460.5	162.3
Extra-EU	443.1	56.6	478.3	57.8	576.9	74.5	305.0	49.0

United States	37.1	9.1	61.9	11.1	65.8	11.5	68.5	10.3
Quality Red Wine								
Total	2,294.1	581.4	2,296.1	554.2	2,231.5	613.2	1,320.8	393.1
Intra-EU	2,291.6	580.6	2,296.1	554.2	2,231.5	613.2	1,320.8	393.1
Extra-EU	2.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0
United States	1.7	0.5	0.0	0.0	0.0	0.0	0.0	0.0
Other Red Wine								
Total	3,715.4	436.4	4,103.7	429.2	4,365.3	529.1	3,035.8	400.0
Intra-EU	2,082.9	214.1	2,425.1	221.2	2,639.1	289.0	1,628.8	214.8
Extra-EU	1,632.5	222.3	1,678.6	208.0	1,726.2	240.1	1,407.0	185.2
United States	210.9	58.9	241.3	50.8	355.8	67.7	256.5	38.0

Table 7 con't: German Imports of Wine, 1,000 hl, Million Euro

Table 7 con't: German Imports of Wine, 1,000 hl, Million Euro

	2001		2002		2003		Jan/Aug 2004*	
Vermouth	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro
Total	481.0	22.8	674.7	27.4	624.3	30.7	228.0	13.7
Intra-EU	310.1	17.4	519.4	22.9	459.0	23.9	227.6	13.6
Extra-EU	170.8	5.4	155.3	4.5	165.3	6.8	0.4	0.1
United States	0.3	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Wine Cooler								
Total	244.9	13.5	502.1	47.0	171.3	13.0	131.8	12.6
Intra-EU	233.3	11.0	492.7	45.4	154.4	10.7	118.7	10.5
Extra-EU	11.7	2.4	9.4	1.6	16.9	2.3	13.1	2.1
United States	1.3	0.3	1.2	0.3	2.5	0.3	1.3	0.3
Liquor/Wine Spirits								
Total	148.3	31.1	174.0	37.0	143.3	38.9	75.5	24.0
Intra-EU	146.8	30.3	172.5	36.4	141.6	38.1	74.8	23.5
Extra-EU	1.5	0.9	1.5	0.6	1.7	0.8	0.7	0.6
United States	0.3	0.4	0.1	0.2	0.1	0.2	0.0	0.2
Sparkling Wine / Base Wine for Sparkling Wine								
Total	1,388.8	408.0	1,367.6	370.6	1,251.3	415.8	769.7	254.8
Intra-EU	1,371.4	402.3	1,347.2	365.3	1,235.2	410.7	763.7	252.3
Extra-EU	17.4	5.7	20.4	5.3	16.1	5.1	6.0	2.5
United States	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0
Total Wine								
Total	11,993.7	1,888.2	13,410.9	1,862.2	12,701.2	2,084.0	8,981.1	1,454.0
Intra-EU	9,710.5	1,593.5	11,067.4	1,584.1	10,198.0	1,754.4	7,248.9	1,214.4
Extra-EU	2,283.2	294.7	2,343.5	278.1	2,503.2	329.6	1,732.2	239.6
United States	251.8	69.4	304.8	62.6	453.2	85.1	326.6	48.8

Source: Federal Statistics Office

Table 8: German Exports of Wine, 1,000 hl, Million Euro

Table 8: German Exports of Wine, 1,000 hl, Million Euro

	2001		2002		2003		Jan/Aug 2004*	
Quality White Wine	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro
Total	1,416.7	225.7	1,374.8	216.8	1,390.6	273.7	878.0	192.1
Intra-EU	1,013.6	122.5	982.9	113.8	981.9	139.6	617.7	101.2
Extra-EU	401.9	101.9	391.9	103.0	408.7	134.1	260.3	90.9
United States	130.0	38.4	138.4	44.2	107.4	38.7	120.0	47.4
Other White Wine								
Total	459.4	44.5	501.5	47.9	597.0	70.5	368.7	51.7
Intra-EU	401.3	36.1	442.2	39.3	515.8	58.8	336.3	45.3
Extra-EU	57.8	8.2	59.3	8.6	81.2	11.7	32.4	6.4
United States	1.6	0.3	1.3	0.3	2.1	0.7	1.7	0.7
Quality Red Wine								
Total	104.1	39.2	95.1	43.3	96.3	53.2	77.2	33.8
Intra-EU	61.9	21.7	52.5	25.7	55.1	30.7	62.2	23.1
Extra-EU	40.9	15.7	42.6	17.6	41.2	22.5	15.0	10.7
United States	2.8	1.4	3.9	2.1	4.0	3.3	1.8	1.2
Other Red Wine								
Total	234.4	38.7	316.0	51.8	447.4	84.0	291.8	57.0
Intra-EU	171.4	25.5	232.6	35.7	338.8	60.8	249.9	46.6
Extra-EU	62.4	12.8	83.4	16.1	108.6	23.2	41.9	10.4
United States	2.2	0.6	3.3	0.9	2.0	1.1	3.1	1.0

Table 8 con't: German Exports of Wine, 1,000 hl, Million Euro

Table 8 con't: German Exports of Wine, 1,000 hl, Million Euro

	2001		2002		2003		Jan/Aug 2004*	
Vermouth	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro	1,000hl	Mill. Euro
Total	112.3	12.4	155.4	15.9	178.6	21.7	105.5	13.8
Intra-EU	94.6	8.4	129.3	10.9	146.0	14.7	94.8	10.5
Extra-EU	16.6	3.5	26.1	5.0	32.6	7.0	10.7	3.3
United States	1.0	0.2	1.9	0.2	1.4	0.3	0.8	0.1
Wine Cooler								
Total	136.7	16.0	181.2	18.2	186.7	21.4	85.8	10.7
Intra-EU	111.3	12.1	152.8	14.4	149.9	16.5	71.3	8.2
Extra-EU	25.4	3.9	28.4	3.8	36.8	4.9	14.5	2.5
United States	0.4	0.1	0.2	0.1	1.0	0.2	0.2	0.0
Liquor/Wine Spirits								
Total	21.5	7.0	31.1	9.7	34.1	12.0	14.5	5.2
Intra-EU	20.4	6.2	30.2	9.0	33.4	11.4	14.2	5.0
Extra-EU	0.8	0.4	0.9	0.7	0.7	0.6	0.3	0.2
United States	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0
Sparkling Wine / Base Wine for Sparkling Wine								
Total	135.4	42.8	136.7	49.1	136.7	46.4	68.7	24.5
Intra-EU	90.9	26.0	87.3	30.9	86.4	25.4	49.5	13.8
Extra-EU	43.2	14.3	49.4	18.2	50.3	21.0	19.2	10.7
United States	5.2	1.4	4.3	1.4	4.2	1.8	2.9	1.3
Total Wine								

Total	2,620.6	426.5	2,791.8	452.7	3,067.3	583.0	1,890.1	388.7
Intra-EU	1,965.4	258.7	2,109.9	279.7	2,307.4	357.8	1,495.9	253.8
Extra-EU	649.1	160.7	681.9	173.0	759.9	225.2	394.2	134.9
United States	143.1	42.5	153.5	47.0	179.3	74.9	130.5	51.8

Source: Federal Statistics Office

Table 9: German Wine Imports by Country of Origin

Table 9: German Wine Imports by Country of Origin

	2001		2002		2003		Jam/Aug 2004	
	1,000 hl	Mill. $	1,000 hl	Mill. $	1,000hl	Mill. $	1,000hl	Mill. $
U.S.A.	250.2	61.9	303.4	62.3	450.6	84.7	325.1	48.5
Italy	4,556.4	564.0	5,125.1	635.8	4,243.2	678.8	2,939.6	489.7
France	2,544.5	518.2	2,644.2	542.1	2,602.7	631.5	1,573.3	392.4
Spain	1,531.0	250.7	1,471.4	250.3	1,968.5	304.4	1,810.9	225.0
Greece	202.0	25.6	208.0	31.1	198.2	33.7	116.1	23.6
Austria	224.7	20.3	462.7	28.5	422.1	35.7	221.2	23.5
Portugal	97.6	20.7	138.0	26.5	144.5	34.7	119.0	22.2
Hungary	185.5	16.2	183.4	16.8	202.3	20.5	116.4	12.9
Romania	198.3	10.9	183.3	10.0	171.3	11.3	90.0	6.9
Bulgaria	201.0	13.0	155.6	11.1	119.2	10.8	64.2	6.7
Mazedonia	461.1	16.6	453.2	17.6	303.4	15.2	318.0	16.2
Tunesia	34.5	2.0	14.2	0.8				
South Africa	121.3	25.0	148.0	29.8	186.4	40.5	169.7	37.6
Chile	329.5	47.8	343.4	43.0	457.9	53.9	403.1	50.2
Argentina	39.6	6.7	37.0	6.0	35.1	5.4	32.7	4.8
Australia	138.3	35.9	211.1	51.9	232.0	52.3	217.0	47.8
Other	152.4	23.1	152.2	24.0	168.2	27.0	105.1	19.6
World	11,267.9	1,658.6	12,234.2	1,787.6	11,905.6	2,040.4	8,621.4	1,427.6

* Preliminary

Source: Federal Statistics Office

Table 10: German Wine Exports by Major Countries of Destination

Table 10: German Wine Exports by Major Countries of Destination

	2001		2002		2003		Jan/Aug 2004	
	1,000 hl	Mill. $	1,000 hl	Mill. $				
U.S.A.	141.6	37.8	151.4	46.7	176.9	74.4	129.5	51.6
Great Britain	929.4	99.5	896.5	112.4	944.5	141.9	609.1	99.1
Netherlands	285.5	32.1	315.3	39.9	379.7	53.0	236.9	39.3
Sweden	120.4	17.5	133.0	20.5	157.5	27.5	97.3	16.5
Japan	101.5	29.9	100.7	30.7	87.3	30.8	46.7	19.3
France	104.5	17.9	139.7	26.5	130.7	26.4	71.5	13.9
Bel/Lux	95.1	12.9	96.3	14.6	99.4	18.0	53.0	10.1
Denmark	73.7	6.6	74.9	6.2	68.4	8.4	46.7	7.0
Austria	54.9	11.2	56.7	15.5	63.4	22.1	36.6	14.2
Canada	45.8	11.1	49.7	13.3	52.1	14.8	34.2	9.7
Ireland	21.4	3.2	31.2	4.8	54.1	8.9	32.5	6.5
Poland	35.3	4.5	37.6	5.4	47.8	7.0	29.9	5.5
Norway	45.6	7.5	55.1	10.0	61.0	12.9	49.5	12.1
Switzerland	17.0	8.5	21.7	10.6	28.3	13.8	17.3	10.0
Latvia	39.3	7.4	48.8	7.7	53.6	9.8	19.3	3.5
Other	260.5	48.8	246.6	53.8	297.3	70.3	188.8	46.0
World	2,371.5	356.4	2,455.2	418.6	2,702.0	540.0	1,698.8	364.3

* preliminary data

Source: Federal Statistics Office

Table 11: Average Prices for Imported Wine

Table 11: Average Prices for Imported Wine

	2001		2002		2003		Jan/Aug 2004*	
	Euro/L	$/L	Euro/L	$/L	Euro/L	$/L	Euro/L	$/L
	Quality White Wine							
WORLD	2.09	1.87	1.96	1.86	1.95	2.21	1.80	2.21
U.S.A.	3.00	2.69	-	-	-	-	-	-
INTRA-EU	2.09	1.87	1.96	1.86	1.95	2.21	1.80	2.21
CHILE	-	-	-	-	-	-	-	-
SOUTH AFRICA	-	-	-	-	-	-	-	-
	Other White Wine							
WORLD	0.71	0.63	0.66	0.62	0.70	0.79	0.63	0.76
U.S.A.	2.45	2.19	1.91	1.80	1.56	1.77	1.23	1.50
INTRA-EU	0.60	0.54	0.55	0.52	0.59	0.67	0.54	0.66
CHILE	1.77	1.58	1.45	1.37	1.02	1.15	1.00	1.22
SOUTH AFRICA	1.64	1.47	1.49	1.41	1.37	1.55	1.35	1.64
AUSTRALIA	2.33	2.09	1.99	1.89	1.72	1.95	1.93	2.36
	Quality Red Wine							
WORLD	2.53	2.27	2.55	2.41	2.43	2.75	2.43	2.98
U.S.A.	3.17	2.84	-	-	-	-		
INTRA-EU	2.53	2.27	2.55	2.41	2.43	2.75	2.43	2.98
CHILE	1.97	1.77	-	-	-	-	-	-
SOUTH AFRICA	2.50	2.24	-	-	-	-	-	-
AUSTRALIA	2.73	2.45	-	-	-	-	-	-
	Other Red Wine							
WORLD	1.17	1.05	1.11	1.05	1.08	1.21	1.08	1.32
U.S.A.	2.79	2.50	2.23	2.11	1.68	1.90	1.21	1.48
INTRA-EU	1.03	0.92	0.96	0.91	0.97	1.09	1.08	1.32
CHILE	1.60	1.44	1.31	1.24	1.04	1.18	1.02	1.25
SOUTH AFRICA	2.71	2.42	2.59	2.45	2.25	2.55	2.10	2.57
AUSTRALIA	3.16	2.83	2.86	2.70	2.10	2.37	1.76	2.16
	Liquor Wine							
WORLD	2.10	1.88	2.25	2.13	2.40	2.71	2.60	3.18
U.S.A.	13.76	12.32	24.00	22.70	15.10	17.09	18.92	22.91
INTRA-EU	2.06	1.85	2.23	2.11	2.38	2.69	2.56	3.14
CHILE	30.70	27.50	4.31	4.08	5.59	6.32		
SOUTH AFRICA	4.70	4.21	2.41	2.28	3.98	4.50	8.49	10.36
AUSTRALIA	10.12	9.06	13.18	12.47	18.42	20.84	10.63	12.94
	Sparkling Wine							
WORLD	2.94	2.63	2.87	2.71	2.94	3.32	2.69	3.31
U.S.A.	9.20	8.24	4.55	4.30	10.00	11.30	10.00	12.05
INTRA-EU	2.93	2.63	2.87	2.71	2.94	3.33	2.69	3.30
CHILE	3.72	3.33	4.52	4.27	3.00	3.40	5.00	6.16
SOUTH AFRICA	3.68	3.30	2.99	2.83	3.31	3.75	2.33	2.86
AUSTRALIA	5.20	4.66	5.36	5.07	5.20	5.88	6.14	7.54
	Vermouth							
WORLD	0.47	0.43	0.43	0.41	0.43	0.49	0.49	0.60
U.S.A.	0.63	0.56	3.11	2.95	2.35	2.66	2.24	2.78
INTRA-EU	0.56	0.50	0.47	0.41	0.46	0.52	0.48	0.60
SOUTH AFRICA	-	-	10.00	9.50	-	-	20.00	24.95

Wine Coolers								
WORLD	0.55	0.49	0.99	0.94	0.67	0.76	0.79	0.96
U.S.A.	2.31	2.06	2.53	2.39	1.11	1.25	1.69	2.07
INTRA-EU	0.47	0.42	0.97	0.92	0.61	0.69	0.72	0.88
SOUTH AFRICA	2.19	1.96	1.07	1.01	2.50	2.83	2.55	3.11

* Beginning 2004 EU 25 - Before 2004 EU 15
Source: Federal Statistics Office

Table 12: Wine Stocks – July 31, in Million hl

Table 12: Wine Stocks – July 31, in Million hl

	Total	White	Red	Domestic	Imported		Sparkling	
					EU	non-EU	Domestic	Imported
2001	16.495	12.163	4.332	12.776	3.037	0.689	0.956	2.024
2002	14.765	10.708	4.058	11.089	3.037	0.639	0.860	1.916
2003	14.278	9.700	4.578	10.889	2.790	0.599	0.832	1.802

Source: Deutsches Weininstitut