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Global Agricultural Information Network

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Bulgaria

Post: Sofia

Wine Market Annual

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Wine

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Report Highlights:

Post forecasts Bulgaria's 2018 grape crop at 270,000 metric tons (MT), most of which will be used to produce about 130-135 million liters of wine. The Bulgarian wine sector continues to evolve and is driven by investments, increasing disposable incomes, tourism, and a thriving food-service industry. Wine consumption increased by three percent in 2017 and consumer trends reveal a growing preference for higher-quality wines. January-August 2018 trade data indicates wine imports by volume decreased by 12-percent. However, imports during this period by value increased by 11 percent. Poland, Sweden, and the United Kingdom were the top export markets for Bulgarian wine (value terms) in 2017 and in 2018.

General Information:

Production

FAS Sofia estimates that Bulgaria's 2018 grape harvest will reach 270,000 MT, of which about 220,000 MT will be processed into 130-135 million liters of wine (Table 5). Post sources report that this year's grape crop was of high quality, especially white wine grapes. In late November 2018, the Ministry of Agriculture (MinAg) reported in [Weekly Bulletin #48](#) that 98 percent of the grape area was harvested. 45,700 hectares (HA) produced 270,000 MT of grapes.

Wine grape production in 2017 declined by 4.5 percent from 2016 to 201,500 MT. Total 2017 vineyard acreage increased by less than one percent over 2016. The harvested area in 2017 decreased by 6.7 percent. Yields in 2017 increased slightly over 2016, to 5.91 MT/HA from 5.77 MT/HA, respectively (Table 1).

Weather conditions were generally favorable throughout the year. The winter was mild and no instances of winterkill were reported. Spring conditions were favorable, although frequent rains from May to July led to additional spraying and higher input costs. Hail damage occurred in northern Bulgaria around Shoumen, Varna, Montana, Vidin, and Vratsa. Summer temperatures were about average. Fall harvest conditions were warm, dry, and ideal for grape quality.

Some leading wineries experienced grape procurement and wine production disruptions after being forcibly closed because of unpaid excise duties and other regulatory irregularities. This sharply reduced grape sales and left grapes unharvested in some regions (particularly Haskovo). This resulted in complaints by farmers and a special Parliamentary hearing on the issue. Farm-gate prices declined up to 50 percent to 0.25-0.45 leva/kilogram (\$0.15-0.26/kilogram) compared to 0.60-0.80 leva/kilogram (\$0.35-\$0.47) in 2017, due to pressure from higher production and lower commercial purchases. Many farmers reported that grape prices were below the cost of production. Reportedly, grape imports from Romania, Moldova, and Macedonia also contributed to lower grape prices. Currently, Post forecasts wine production to reach about 130-135 million liters in 2018 due to the larger grape crop (Table 5). However, for the abovementioned reasons, FAS Sofia projects that commercial wine production will likely decline while homemade wine is likely to increase.

Vineyard Area

The vineyard area increased by less than one percent in 2017 to 51,272 HA, 66 percent of which was harvested (down from 72 percent in 2016). The 2017 decline in the area harvested was due to a 12-percent reduction in area harvested for red varieties, while area harvested for white varieties grew by two percent. By region, the southwestern region achieved the highest percentage of area harvested at 89 percent, followed by the southeastern region at 74 percent. The most abundant production areas continued to be in the southeastern and southcentral regions, which accounted for 40 and 31 percent of total production, respectively.

Immature, non-yielding vineyards accounted for three percent of total area. According to official data, 1,000 HA of new vineyard area were planted in 2017. Wineries continued to expand and replace old rootstock. White wines are increasingly popular, leading to investment in white grape varieties,

particularly over the last three years. White varieties accounted for 37 percent of harvested area in 2017 (Table 1), up from 33 percent in 2016. Red varieties continued to dominate, with 63 percent of harvested area. See [Attaché Report](#) about the varieties and details about planting.

Rootstock age remains a challenge, despite EU subsidies and active investments over the last decade. In February 2018, MinAg approved a new [National Viticulture Program](#) 2019-2023, which also provides guidance for using EU and national funds (see policy section). €134 million of EU funds are earmarked under this program for “restructuring and converting” vineyards. According to the program, only 32.5 percent of all rootstock is under 30 years old, including 4.1 percent which is no more than three years, 9.2 percent which is no more than 10 years, and 19.2 percent no more than 29 years old. The program seeks to improve production, particularly for Protected Designation Origin (PDO) and Protected Geographic Indication (PGI) wines.

Table 1: Industry Development 2015 - 2017

Vine Industry Development 2015- 2017			
	2017	2016	2015
<i>Total Vineyard Area on Farms</i>	51,272	50,892	50,705
- PDO, HA	15,952	15,900	15,355
-Protected Geographic Indication (PGI), HA	21,159	21,115	21,432
-Other (without PGI/PDO), HA	23,472	23,403	23,201
Total Area Harvested Vineyards, HA, including:	34,111	36,551	38,712
-Table Grape Vineyards, HA	2,126	2,009	2,254
-Wine Grape Vineyards, HA	31,985	34,542	36,458
--Of which: White Varieties, HA	11,826	11,631	12,421
Red Varieties, HA	20,159	22,911	24,037
<i>Grape Production, Total, MT</i>	201,529	211,083	261,820
• Wine grapes, MT	187,290	199,547	244,357
• Purchased for commercial wine making	165,818	173,503	195,860
• For homemade wine	24,327	26,765	42,176
• PDO grapes, MT	1,170	1,510	2,630
• PGI grapes, MT	56,770	54,470	76,850
• Other (without PGI/PDO), MT	129,350	143,570	165,300
• Table Grapes, MT	14,297	10,066 (11,540 per Eurostat)	16,320 (17,040 per Eurostat)
• From Standing Vines, MT	1,101	1,470	1,143

Source: MinAg Statistical Bulletin #342/April 2018, and Eurostat

Grape Yields, Production and Use

Average grape yields increased slightly in 2017 to 5.91 MT/HA, a 2.4-percent growth over 2016 due to more favorable weather and better input application. The 2017 harvested area declined by 6.7 percent

from 2016, and grape production decreased by 4.5 percent as a result (Table 1).

Table 2: Grape Production and Utilization, 2015 – 2017

	2015		2016		2017	
	MT	Percent	MT	Percent	MT	Percent
Total grapes	261,820	100	211,083	100	201,529	100
Grapes for wine manufacturing	242,936	92.7	203,242	96.3	191,657	95.1
Grapes for direct consumption	18,884	7.2	7,841	3.7	9,872	4.9
Grapes processed at commercial wineries*	195,860	80.6	173,503	85.4	165,818	86.5
Grapes for homemade wine*	42,176	17.4	26,765	13.2	24,327	12.7
Other products*	4,900	2.0	2,974	1.4	1,512	0.8

*as a share of grapes for wine manufacturing

Source: MinAg Statistical Bulletins, #342/April 2018

In 2017, about 95 percent of total grapes were used for wine, however, most commercial wineries reduced grape purchases by 4.5-percent in absolute volume (Table 2). Accordingly, commercial wine production in 2017 reached 108 million liters, a 10.6-percent decline from 2016 (Table 3). Reduced grape stocks negatively affected homemade wine producers as well. Grapes for homemade wine accounted for 12.7 percent of total grapes in 2017, versus 13.2 in 2016 (Table 2). Homemade wine declined by 10.3 percent to 11 million liters (Table 3). Thus total wine output (commercial and homemade) declined by 4.8 percent versus 2016.

Many wineries focused on producing PGI-category wines, due to better export opportunities, which drove production of PGI wines by 3.9 percent. Conversely, production of PDO wines, and non-PDO/non-PGI wines declined by 22 percent and 18 percent, respectively (Table 3). Despite the decline in non-PDO/non-PGI wines, these wine still accounted for 64 percent of production in 2017, down from 69 percent in 2016. Red and rose wines production declined by 14.2 percent to 51.4 million liters. White wine production decreased by seven percent to 56.6 million liters.

Bulgaria’s wine industry currently consists of 266 wine makers (260 in 2016), most of whom are small-to medium-sized. According officials, 72 of the wineries have some level of foreign investment. Currently seven Bulgarian wineries produce organic wine.

Table 3: Bulgarian Wine Production, 2014-2017, thousand liters

	2014 (000)	2015 (000)	2016 (000)	2017 (000)	Percent Change 2017/2016
With protected designation of origin (PDO)	1,053	1,686	951	741	-22.0%
With protected geographic indication (PGI)	32,223	50,372	36,098	37,522	+3.9%
Other	41,419	78,957	83,729	69,726	-17.0%
Commercial Total	74,695	131,015	120,778	107,989	-10.6%
Grapes must	8,615	5,666	3,721	7,707	+107.0%

Homemade	4,808	20,075	12,619	11,319	-10.3%
Total	79,503	151,090	133,397	127,015	-4.8%

Source: MinAg Statistical Bulletins, #342/April 2018

Consumption and Market Trends

Higher incomes, urbanization, tourism, and increased consumer demand, especially by millennials and women, supported growth in wine consumption and sales in 2017 and 2018. New product launches, online sales, and social media also boosted wine sales in 2017 and 2018. For two consecutive years, wine growth by value has surpassed wine growth by volume.

2017 wine sales by volume increased by 2.95 percent over 2016, reaching 129 million liters (source: Euromonitor). Similar levels of growth will likely persist through 2022 when wine sales are forecast to reach 150 million liters (Table 4). By value, wine sales grew faster, reaching 3.7 percent. Higher-value sales reflect an increasing preference for quality. This increase also outpaced growth between 2016-2015, which was 2.9 percent (Table 4). Post expects wine sales to reach €652 million by 2022 preserving the annual growth of 3.7 percent for 2019 and 2020.

Retail wine sales accounted for 82 percent of total sales in 2017, the same as 2016 (by volume) versus 18 percent in food service outlets channel. However, sales in value terms increased from 59 percent in 2016 to 60 percent in 2017. Growth in retail wine sales by volume was still higher at 3.2 percent.

Table 4: Market Development

Wine Market Development 2013-2017					
Wine Sales	2013	2014	2015	2016	2017
Wine Sales in Liters	115,500	111,100	122,100	125,400	129,100
Wine Sales/€ Million	487	473	515	530	550

Source: Euromonitor

Current Market Trends:

- Economic stability, higher disposable incomes, and an expanding middle class support demand growth for higher-quality wines and even exclusive wines. Demand for PDO and PGI wines increased.
- Growth in high-end culinary and increased focus by urban consumers on health and wellness influences wine demand. Wine is increasingly perceived as a more healthful choice, as well part of the culinary experience. It is also perceived as lower in alcohol (versus spirits), natural, and has antioxidant effects.
- Wine promotional formats such as wine fairs, festivals, exhibitions, golf tournaments, gift packs, cultural/art events, etc. This has improved wine awareness and prompted wine culture. Sales of award winning wines have increased. In 2017 and 2018 MinAg and the Ministry of Tourism promoted 12 Bulgarian wine and culinary destinations for tourism. Some wine makers have invested in wine tourism/tasting, spa facilities, and food outlets as a way to promote their wines and diversify incomes. There are now two wine trade shows and competitions, Vinaria and DiVino, which are attracting reputable international participants.
- Retailers are focusing more on wine sales and allocating more prime shelf space for their wine portfolios. For example, Kaufland and Metro Cash and Carry retail chains have launched a

private labels featuring selected wines with easy label guidance. This approach educates mass consumers and responds to the growing interest in wine culture.

- The food-service industry is focusing more on consumer expectations and is featuring more quality, unique, boutique, and exclusive wines. This channel has traditionally relied more on imported wines, but in 2017 higher-quality domestic wines were featured more.
- Rose wine sales grew by 10.9 percent in 2017 over 2016, mainly due to its perception as a pairing for healthful foods. Rose is also a favorite during the summer months and is often preferred by female wine consumers.
- White wine sales grew by 3.9 percent and red wine sales grew by one percent. Market share white wine increased from about 25 percent market share in 2016 to 33 percent in 2017.
- New colored wines, especially blue wine (PasionWines, Marques de Alcantra Blue Wine), as well as orange and green wines trended among younger consumers.
- Local wine makers emphasize quality and authenticity. Government efforts to limit gray-market channels and tighten control on production are likely to encourage higher quality production over the long term (see policy section).

The local wine industry is increasingly oriented toward the local market instead of exporting. According to one private study (the study covers 116 local wineries, accounting for 70 percent Bulgarian production, [source: Capital](#)), local sales by domestic wineries in 2017 increased by four percent to 187 million leva (\$110 million). Domestic wine sales (local sales and exports) reached 259 million leva (\$152 million), a four-percent increase over 2016.

Imported wines comprised about 10 percent of market share in 2017 (Table 5). Imported wines are priced at mid to higher levels, and appeal to higher-income and younger urban consumers. Italian wines dominate due to quality and affordability. American wines are perceived as high-quality, however they tend to be viewed as unaffordable by many consumers. The average price of one liter of U.S. wines in Bulgaria in 2017 was \$9.54, compared to \$1.97 for one liter of Italian wine, and \$0.87 for one liter of Spanish wine. The average price of one liter of imported (mostly European) wine in 2017 was \$2.43. Nonetheless, evolving consumer preferences also presents market opportunities for U.S. wines.

Table 5: Wine Supply and Demand, 2013-2018, thousand liters

Wine Sector Development, 2013-2018F						
	2013 (000 liters)	2014 (000 liters)	2015 (000 liters)	2016 (000 liters)	2017 E (000 liters)	2018 F (000 liters)
Wine production, total	188,341	79,503	151,090	133,397	127,015	135,000
- Commercial wine	172,447	74,695	131,015	120,778	107,989	120,000
- Home-made wine	15,894	4,808	20,075	12,619	11,319	15,000
<i>Imports</i>	<i>6,541</i>	<i>4,947</i>	<i>8,917</i>	<i>7,311</i>	<i>8,727</i>	<i>7,500</i>
-Intra EU	5,884	4,131	7,930	6,124	7,782	7,000
-Extra EU	657	816	987	1,187	945	500
Total supply	194,882	84,450	160,007	140,708	135,742	142,500
<i>Exports</i>	<i>50,901</i>	<i>43,305</i>	<i>38,264</i>	<i>31,411</i>	<i>30,522</i>	<i>31,000</i>
-Intra EU	35,801	29,351	32,752	25,690	25,524	26,000
-Extra EU	15,100	13,954	5,512	5,721	4,998	5,000

Local Market/Apparent Consumption and Stocks	143,981	41,145	121,743	109,297	105,220*	111,500
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Notes: *According to official and industry sources, local wine consumption in 2017 was 110-120,000 MT which indicates consumption of old stocks in addition to apparent consumption. Data about stocks is not typically published.

** Export and import data is based on World Trade Atlas/Eurostat.

Source: MinAg, WTA data, Euromonitor International; 2017 E and 2018 F – Estimates and Forecast by FAS/Sofia

Wine Trade

Table 6: Wine Trade, 2015 – 2018 (January-July)

HS#2204 Wine	2015	2016	2017	January-July 2017	January-July 2018	Difference in Percentage
<i>Wine Imports</i>						
• In 000 Liters	8,917	7,320	8,727	6,137	5,027	-18.10%
• In U.S. \$ (million)	20.6	17.5	21.2	12.5	13.7	+9.97%
<i>Wine Exports</i>						
• In 000 Liters	38,264	31,411	30,522	16,632	16,260	-2.24%
• In U.S. \$ (million)	39.7	36.6	38.6	20.1	22.6	+12.49%

Source: World Trade Atlas/WTA/Eurostat

Exports

Bulgaria is a net wine exporter although its exports have declined in absolute and relative terms. Exports dropped sharply in 2013-2016, although this trend was more moderate in 2017. In 2017, exports by volume declined by 2.8 percent, but grew by 5.4 percent in value due to an 8.5-percent increase in average export prices, from \$1.17/liter in 2016 to \$1.27/liter. Prices to main export markets, Poland, Sweden, and Russia were higher than in 2016. The highest was the increase in the average export price to Russia by 18.5 percent.

Bulgarian wine exports to Poland grew by less than two percent in 2017. Poland remained Bulgaria's largest export market and accounted for 34 percent exports by value and 55 percent of exports by volume. Exports to China jumped by 77 percent to \$4.9 million, surpassing Sweden at \$4.5 million, as Bulgaria's second-highest export market. Russia was the third largest export market in 2017 with 2.6 million liters and the fourth in value terms with \$3.4 million. Exports to Russia began to decline since 2013 and in 2017 it decreased by 30 percent in volume and by 17 percent in value compared to 2016 (Table 7).

Table 7: Bulgarian Wine Exports to Russia Development 2013-2018

Bulgarian Wine Exports to Russia Development 2013-2018						
	2013	2014	2015	2016	2017	2018

						(July)
Relative share of wine exports to Russia in value, percent	26.9	27.4	10.3	11.2	8.8	5.6
Relative share of wine exports to Russia in volume, percent	26.7	27.9	10.2	11.6	8.4	4.9

Source: WTA

According to private local analysis, exports from Bulgaria's top-25 wineries declined by seven percent in 2017. As a result, exports accounted for 27 percent of total wine industry sales, down from 29 percent in 2016, and 33 percent in 2015. Over 90 percent of wine exports are from the leading 25 wineries. Reds tend to dominate as exports, while whites are mostly sold domestically.

During January-July 2018, exports declined by 2.2 percent in volume, while increasing by 12.5 during the same period in value over the same period in 2017 (Table 6). Wineries are trying to shift exports to Western Europe, Asia, and the United States. Exports to all major export markets (with the exception of Russia) saw double-digit growth. The top export markets by volume and value remained Poland and Sweden. Although exports to Russia and China declined significantly during this period, according to the [Vine and Wine Executive Agency](#), China agreed to purchase 12 million bottles of Bulgarian wine per year for seven years starting from January 1, 2019 (Bulgarian exports to China in 2017 were at 937,000 liters).

Bulgaria makes promotes wines at international competitions. In 2018, Bulgarian wines won 44 medals at the Concours Mondial de Bruxelles in China (one grand gold, 15 golden and 28 silver medals). Bulgarian wineries won silver medals at the Los Angeles International Wine Competition, won 30 medals (seven golden and 24 silver) at the Mundus Vini, and another 18 medals (one golden and 17 silver) at Vinalies Internationales Competition in Paris.

Imports

Imports have grown steadily since 2009. In 2017, imports recovered following a dip in 2016, increasing by 19.4 percent in volume and by 21.3 percent in value. The average import price continued to increase, reaching \$2.43/liter, up from \$2.39/liter in 2016.

Italian, Spanish, and French wines sustained leading positions in imports in 2017 (by volume). Italian exports to Bulgaria jumped by 34 percent, followed by 19 percent growth for the Spanish wines. These two countries accounted for 61 percent of total wine imports.

In value terms, French and Italian wines accounted for 52 percent of imports. Imports of French wines held the largest share in total imports at 27 percent, followed by Italy at 26 percent, and Germany at 11 percent. It is notable that demand for quality wines drove imports of more expensive wines, resulting in import growth from Italy, Spain and Germany at 36-37 percent for each country, followed by New Zealand with 20 percent growth. Spanish and New Zealand wine sales have grown in the Bulgarian market, each with a 50-percent sales increase during the 2015-2017 period. Spain and New Zealand are now Bulgaria's fourth and fifth-largest wine suppliers, respectively.

Direct U.S. wines exports in 2017 grew by 50 percent (9,558 liters) and by 108 percent in value (\$90,000). FAS Sofia research shows that U.S. wines enter the market directly, but also through

transshipment points in Belgium and Germany. As a result, total U.S. wines exports to Bulgaria are closer to 20,000 liters and \$200,000 in value terms.

During January-July 2018, total imports (by volume) declined by 18 percent. Although wine imports decreased by volume during this period, imports grew in value terms during this period by 10 percent, reaching \$13.7 million (Table 6). This demonstrates a shift away from low-quality/low-cost toward high-quality/higher-cost wines. The average import price grew significantly by 34 percent \$2.73/liter. Spain, Italy, France, Germany, and New Zealand continued to be the top suppliers, however, only France and New Zealand had a sustained growth while the other suppliers reduced their exports to Bulgaria.

Agricultural and Trade Policy

The [National Viticulture Program 2014-2018](#) under the EU’s 2014-18 Common Agricultural Policy which budgeted €154 million (€31 million annually) concluded in 2018. In 2018, 91 percent of the program’s budget was absorbed under 280 projects, valued at 46 million leva (€23 million). The largest share of funds was dedicated to “restructuring and conversion” or replanting old rootstock due to age or inappropriate varietal structure (75 projects). Drip irrigation and soil erosion were the other major components (88 projects). Over the last five years, €130 million, or 84 percent of the entire program, were spent under “restructuring and conversion”.

The new [National Viticulture Program 2019-2023](#) was approved in February 2018, Its budget was reduced by €20 million to €134 million or €26.8 million annually. The emphasis on “restructuring and conversion” remains with an allocated budget of €76.3 million, or 57 percent of the entire program. The second priority, “winery investment”, has a budget of €42.5 million or 32 percent.

There is also new funding under the program for vineyard insurance (€5.0 million). Upwards of 80 percent of insurance premiums can be covered under the program if farmers are registered in the national viticulture registry. The goal is to encourage insurance coverage and to get at least five percent of vineyards area under a crop insurance plan. Another activity under the program aims to support export promotion (€10.0 million) and to grow Bulgarian wine exports to non-EU markets by at least 10 percent, especially of PDO and PGI wines. In October 2018, MinAg approved the main implementing [regulation](#) under the viticulture program.

In the fall of 2017, the MinAg drafted an updated version of the [major legislation for wine and distilled spirits](#). The draft was published for public comments, approved in the fall of 2018 (Official Gazette#98 of November 27, 2018 – [Wine and Distilled Spirits Law](#)) and will be enforced from January 1, 2019. It transposes current EU regulations for the wine industry in the national law. The new law is likely to benefit production of PDO and PGI wines by introducing clear standards of wine classification and quality.

Appendix:

Table 8: Bulgarian Wine Imports, 2013- 2018 (July), in value

Bulgaria Import Statistics
Commodity: 2204, Wine Of Fresh Grapes, Including Fortified Wines; Grape Must (Having An Alcoholic Strength By Volume Exceeding 0.5% Vol.) Nesoi
Calendar Year: 2012 - 2016, Year To Date: 07/2017 & 07/2018

000' United States Dollars								
Partner Country	Calendar Year					Year To Date		
	2013	2014	2015	2016	2017	07/2017	07/2018	%Change
World	17,791	17,010	20,590	17,482	21,199	12,472	13,715	9.97
France	5,495	5,130	4,555	5,158	5,626	3,065	3,885	26.72
Italy	5014	3648	4,963	3993	5,435	3,316	2,786	-15.99
Germany	1,571	1,933	2,086	1,689	2,317	1,277	1,120	-12.26
New Zealand	673	1,367	1,317	1,649	1,982	1,221	1,851	51.57
Spain	539	722	1,446	1,609	2,218	1,545	1,183	-23.45
Chile	1,360	1,427	1,244	947	867	571	464	-18.7
Netherlands	529	583	551	520	316	169	126	-25.38
United Kingdom	604	552	907	372	186	90	102	12.74
Argentina	72	193	293	254	179	110	75	-31.64
South Africa	93	209	172	208	143	98	47	-51.75

Source: WTA

Table 9: Bulgarian Wine Exports, 2013-2018 (July), in value

Bulgaria Export Statistics								
Commodity: 2204, Wine Of Fresh Grapes, Including Fortified Wines; Grape Must (Having An Alcoholic Strength By Volume Exceeding 0.5% Vol.) Nesoi								
Calendar Year: 2012 - 2016, Year To Date: 07/2017 & 07/2018								
000' United States Dollars								
Partner Country	Calendar Year					Year To Date		
	2013	2014	2015	2016	2017	07/2017	07/2018	%Change
World	61,941	55,020	39,724	36,650	38,623	20,083	22,592	12.49
Poland	14,704	14,468	12,700	12,467	13,129	6,594	8,287	25.68
Russia	16,674	15,102	4,102	4,098	3,398	1,465	1,282	-12.5
Sweden	3,659	3,725	3,601	3,896	4,751	3,101	3,399	9.62
China	982	1,645	988	2,760	4,880	1,943	714	-63.21
United Kingdom	3,427	3,832	3259	2,213	1664	971	2,111	117.27
Czech Republic	4,292	2,770	1,743	1,428	1,663	929	1,329	43.13
Belgium	1189	1,409	1,381	1,389	1,249	745	830	11.51
United States	593	968	652	1,210	1,251	711	622	-12.44

Source: WTA

