MONDAY
4th April 2022

YEAR 95
Supplement to Issue 12

TOPIC OF THE YEAR
Sustainability IN THE CELLAR

The topic for 2022 of our magazine will be Sustainable Wine Cellars, a specific focus that starts in the wine cellar to define a sustainability strategy for every winery

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WINE WORLD MAGAZINE

SUPPLEMENT TO ISSUE 12 OF IL CORRIERE VINICOLO, 4TH APRIL 2022

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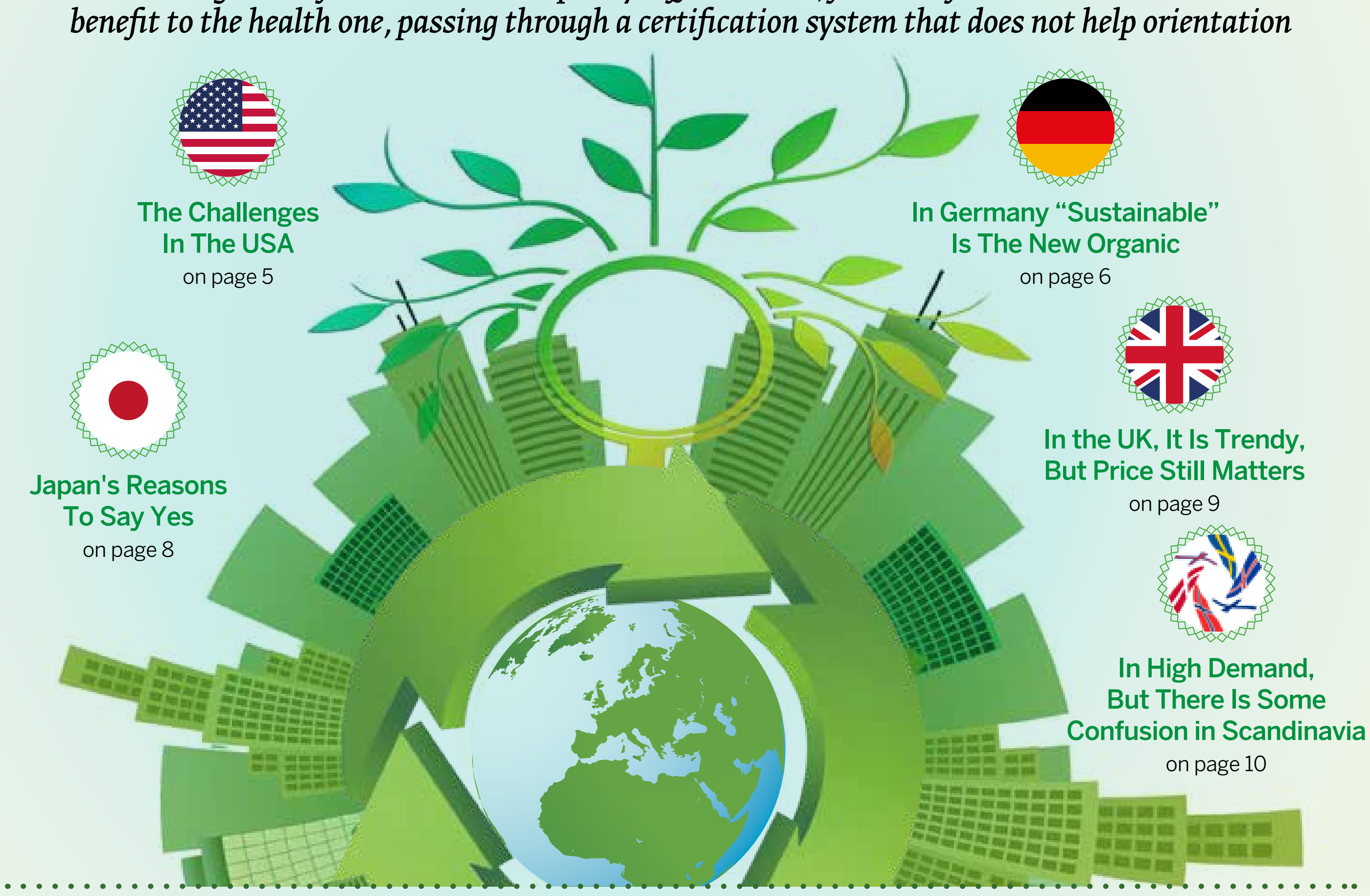
A SURVEY IN THE MAIN COUNTRIES CONSUMING SUSTAINABLE WINES

MARKETS FANCY SUSTAINABILITY
But What Kind And At What Cost?

The "eco-friendly" trend is growing on wine markets, but there is not a precise identity and a common vision of what "sustainable" means. From our exclusive survey in the main global markets, it appears that each segment of consumers has a partly different idea, from the focus on the environmental benefit to the health one, passing through a certification system that does not help orientation



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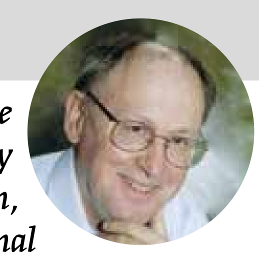

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AN EXCLUSIVE INTERVIEW WITH TOBIAS WEBB, CO-FOUNDER OF THE SUSTAINABLE WINE ROUNDTABLE

A Global Standard
To Promote Credibility

The word sustainability is now a world driver to promote the development of the sector. But to be credible, it needs to define global standards (and certification) in terms of wine production, distribution and marketing, all critical issues in the vineyard and the cellar, various international research and the controversial relationship with organic farming. The commitment of the Sustainable Wine Roundtable is based on a scientific, communicative but also political level

By **GIULIO SOMMA**

First on the G20 agenda, as well as that of the European Union, is the fight against climate change, which by necessity involves the ambitious goal of zero emissions by 2050. A commitment that the Old Continent has undertaken in the awareness that this goal represents only 7-8% of all air pollution, but is no less important. Controlling global warming below 1.5 degrees, on the other hand, is of vital importance to keep the Earth in a balance that, every year, has to face catastrophic and extreme climatic events, droughts and monsoons. The effort must come from every front and every productive and economic sector, including that of wine, which is looking with increasing attention to the only possible path, that of sustainability. Environmental, of course, but also social and economic sustainability, since one without the other would not suffice to guarantee a bright future for the thousands of producers around the world. An ambitious but nevertheless possible goal, on which the Sustainable Wine Roundtable has been working proactively for some time, and will present its work and the results of the latest research carried out with Imperial College London at the next Simei - International Exhibition of Wine and Bottling Machines in Milan, on 15 and 16 November 2022. The way to reach a standard of reference and global evaluation of the sustainability of wine, and therefore its measurement, is outlined, but the obstacles, as reported to Corriere Vinicolo by **Tobias Webb**, co-founder of the Sustainable Wine Roundtable, are many, starting with the most urgent: the income statement. That Europe hopes to be able to support with the 600 billion euros of the NextGenerationEU recovery plan and the seven-year budget that will finance the Green Deal. But a great deal, in terms of approach and management, both in the cellar and in the vineyard, will have to change.

Environmental sustainability is now a commitment endorsed by wine producers from every corner of the world. What is your point of view?

Sustainability is an extremely important issue. Each sector produces emissions, each sector has an impact on the environment, and each sector must deal with increasingly tighter moral duties in order to find a solution, ensuring that every company can have a positive impact on the environment. It must be like this, the goal today is to have respect for the environment, and this concerns the wine industry as much as any other type of sector.

What are the major problems that a wine producer has to face, in the vineyard and in the cellar?

I believe that the greatest difficulties faced in the vineyard are linked to climatic variability. In the last five years, I have had the opportunity to interview more than 100 winemakers, producers and managers on the great theme of sustainability, and each of them has said exactly the same thing. At present, the unpredictability of weather conditions is the biggest risk that has to be faced. A risk caused by CO_2 and greenhouse gas emissions, which are responsible for climate change. In the vineyard, the three major difficulties relate to the unpredictable variations in the weather, the health of the soil and the resilience of the agricultural ecosystem. These are interconnected issues, because climate change is having an impact on biodiversity and on different soils, on the subject of which, among other things, we do not know enough. Recently, I had the opportunity to speak with a producer who has gone as far as seven metres deep in the analysis of his soils. I asked him if he knew anyone else in the wine industry who had gone so far, and he replied no, that at most you usually get to two metres deep. In fact, you can learn a great deal about vineyard resilience by looking at the geological structure of the rocks that lie deep down, tracing, monitoring and testing in order to understand what happens down below.

Therefore, climate change is undoubtedly the biggest problem, but the other problem is being able to have healthy and resilient soils, capable of supporting the next generation of winemakers, the ecosystem and the vineyard itself. After all, it is about the health of the vine, which must face increasingly difficult challenges, starting with climate change and the consequent meteorological unpredictability. We can say that the more we know about biodiversity, the more we can learn about the genetic diversity of the vineyard and the way in which we can make it resilient to climate change. Many producers are worried because the genetic profile of the varieties they grow is essentially similar for everyone, and this means that if a disease, caused by climate change, whether it be a bacterium, a fungus or a parasite, affects a variety, it will also affect all the others. If, on the other hand, there is genetic diversity in the vineyard, the possibility that the vineyard can better resist parasites, diseases and climatic unpredictability is greater. In the cellar, however, the two major problems concern water resources and CO_2 emissions in all the different practices related to winemaking, which some of the leading companies in the world of wine - above all the Spanish Torres - have learned to "capture" and reuse within the production cycle. Definitely an excellent idea, because most of the wine companies are large producers of CO_2, especially during fermentation. There are also other problems in the cellar of course, from energy consumption to the use of chemicals, but the greatest impact concerns water and CO_2 emissions.

What about research? Is enough being done to find solutions?

Yes, research is doing a great deal. We are currently conducting a study with Imperial College London to examine technologies that can be used in vineyards and cellars to reduce the environmental impact. There are many solutions, but they require investments and, at the same time, a deep change in the way wine is produced and the winery, vineyard and, more generally, the company are managed. Many universities are doing really interesting research, such as that of Geisenheim, in Germany (member of the Sustainable Wine Roundtable), on reducing the impact of viticulture on the environment.

How do you judge the relationship between sustainability and organic production: do you think there is a need for some sort of transition to make the organic model sustainable?

The simplest answer to such a question is: it depends. And it depends above all on "how" one is organic. For example, one of the critical issues of organic farming concerns the working of the

• SUSTAINABLE WINE • ROUNDTABLE

The Sustainable Wine Roundtable is an international, independent, non-profit roundtable that involves the main stakeholders of the sector, in order to support the community of producers in creating a market in which high quality wine is produced, traded and consumed in ways that conserve and regenerate ecosystems, protect human rights, foster equality and inclusion, and generate prosperity, pride and a passion for excellence. Members: Ahold Delhaize, Alko, Alliance Wine, Amfori, Amorim Cork, Blb Vignobles, British Glass, Bsi, Catena Institute of Wine, Whole Foods Market, Château Léoube, Cloudy Bay, Concha y Toro, Diversity in Food & Beverage, Domaine Bousquet, Enotria & Coe, Equalitas, Famille Perrin, WWF, Fish Friendly Farming, Food Alliance, Grupo Avinea, Hochschule Geisenheim University, International Wineries for Climate Action, JancisRobinson.com, Journey's End Vineyards, Napa Green, Lidl, Wines of South Africa, New York Wines, North South Wines, Preferred by Nature, Ramón Bilbao, Schenk, Ste. Michelle Wine Estates, Sustainable Agriculture Network, Sustainable Winegrowing Australia, Sustainable Winegrowing British Columbia, System Bolaget, Co-op Uk, The Fairtrade Foundation, The Porto Protocol, The Wine Society, Treasury Wine Estates, Vingruppen I Norden, Vins de Bordeaux, Vintage Wine Estates e Waitrose & Partners.

Info: https://swroundtable.org/

SWR WILL TAKE THE STAGE AT SIMEI 2022

SWR will present its work and the results of the latest research carried out at the upcoming Simei, the International Enological and Bottling Equipment Exhibition that will take place in Milan on November 15 and 16, 2022.
The two sessions will have the following schedule.

FIRST SESSION
15th of November 2022
The *SWR* will present the work it is doing and will then present the findings of recent research conducted with Imperial College London on the technology trends in wine and sustainability.
• Panel discussion:
"Which are the technologies now, or in the future, which will be vital in making wine truly sustainable?"

SECOND SESSION
16th of November 2022
The *SWR* will present the work it is doing and will offer more in-depth insight into the *SWR* Global Reference Standard and the working groups. *SWR* will also outline how new members can join and the benefits of doing so.
• Panel discussion:
"What will be the true benefits of the Global Reference Standard on sustainable wine?"

land and the management of the vegetation between the rows. Organic viticulture requires an above-average number of passages in the vineyard, with the risk of oxidizing the soil and causing erosion, not to mention CO_2 emissions from tractors. Much depends on the type of work that is done on the ground: one thing is to pass between the rows to work it, another to simply pass over it and crush it to treat the plants. The real problem with organic farming is that it is not proactive enough: it all comes down to a series of things to avoid which does not solve the problems that arise in the vineyard. For example, in organic farming you cannot use artificial chemicals, but you are allowed to use organic based or approved organic chemicals, including toxic substances such as copper and sulfur. Furthermore, within the organic world, there are different standards between various countries, thus for example, certain products are allowed in Germany but not in France. It's not that simple, but in the end the biggest problem is that it is not a proactive approach to ecosystem management, but a set of rules that boil down to the non-use of chemicals. And this may or may not work. It depends on where we apply these principles, but it is not possible to offer holistic approaches or solutions to the entire ecosystem. There are also other forms of philosophy that are becoming popular, such as biodynamic, which instead looks at sustainability through an ecosystem perspective, even if many argue that biodynamic farming practices have very little to do with a scientific approach, and indeed there is an important component of mysticism. If there is science behind biodynamic it is in the aspects that concern soil health, while others make the idea seem rather crazy, like getting up at 2 am to harvest according to the lunar calendar, as if the fruit knows the difference between one day or another. However, there are interesting aspects, because it focuses a lot on the resilience of the ecosystem, but ultimately both biodynamics and organic approaches depend exclusively on their own rules, without the ability to look at the broader ecosystem context. A fundamental aspect is also that of costs, because the first pillar of sustainability is economic sustainability.

The Green Deal already shows how the European Union's ambitious environmental objectives are very expensive in economic terms: how can the wine industry combine three different needs such as environmental sustainability, social sustainability and economic competitiveness?
This is the real challenge and much depends on the territory in which you operate. For example, in Provence, where I lived, there are all conditions for chemistry-free or almost chemical-free approaches, but many producers continue to flood their vineyards with chemicals simply because that is what their parents and grandparents did, not because there is a real necessity. In this sense, the organic approach can be useful in making farmers understand that it is possible to be economically sustainable even by using less chemicals. As a Sustainable Wine Roundtable, we believe that all the tools available should be used, because there is nothing to worry about if it can be demonstrated, in this way, that the environment should not be damaged. To do this, you don't need a dogmatic approach like that of organic farming, you just need to be intelligent, especially in small farms, where producers should have the knowledge and experience to understand the impact of what they use on the wines they produce. Returning to the organic approach, costs are not important in Provence, but if we wanted to convert all Champagne, or Bordeaux, or Piedmont to organic, they would be very important, also because for many winemakers the margins are really low: the challenge is about the economic accessibility of certain protocols, the cost of which varies according to the territory. If we use an intelligent approach to sustainability, based on the evidence of climate and research, we can apply these techniques all over the world, without having to erode the profits of companies, whether they are in Champagne or Piedmont. What we suggest is that wineries use all the tools, with the awareness of thorough understanding, and in a transparent way, what they have at their disposal.

The challenge is also to face this change with a lower European budget...
And that is why one of the things we want to do as a Sustainable Wine Roundtable is to go to Brussels and meet political representatives in order to convince them that what is needed is not organic viticulture, but sustainable viticulture. We have to be very clear about what we are asking, because in other parts of the world there are regions that are self-certified as sustainable, but which are not sustainable, simply by adopting a different certification scheme, even with only 100 or 200 producers participating.
What we need to do as a wine industry is to collaborate, through the Sustainable Wine Roundtable, in order to create a global reference standard for sustainable wine production, distribution and sale. When we have achieved this, we will start producing sustainably as a wine industry as a whole, and at that point we can present this idea in a compact way in Brussels and shift the focus from organic to sustainability, helping European politicians and bureaucrats who draft regulations to understand the differences between "sustainable" and "organic". To achieve this, our definition of sustainable must be credible. We cannot limit ourselves to a list of things, such as organic, and self-certification. It is not enough; we must take into consideration other sectors, other activities, but also science and the society in which we live. The right way is to have a process in which each step is reported, so as to create a global reference standard, which is exactly the process we are going through right now. We know how to do it, because we work with people who have done the same thing for other industries. And here another front opens up, a huge problem in the world of wine: its inability to look outside itself, as if living in a bubble, in which everyone feels special and believes they have to face unique problems, which is not this case. Wine would have a lot to learn, for example, from the Italian tomato industry, or from that of hazelnuts. Our mission is to ensure that our standard becomes the global reference, and must be based on existing best practices in agriculture and with respect to soil consumption, not only on the experiences that come from the wine industry.

The last, more than a question, is a curiosity: do you believe that a sustainable approach to wine production can bring stylistic changes?
The last time I was in Friuli, a friend and producer told me about all the interventions he had made in the cellar, not necessarily using chemistry. Often it was a question of micro interventions, to obtain the aromas he wanted in his white wines. Everything we do to ensure the sustainability of the wine industry will play the same role as any other variable in the construction of the aromatic profile of a wine, but the skills of the winemaker will remain fundamental. In a wine we savour the terroir, the effects of the weather, but also the skills of the winemaker, as important as all the other factors.
There are those who say that biodynamic and organic wines taste better, while others argue that biodynamic vineyards are more vigorous and produce wines that are not suitable for ageing and should preferably be drunk when young. I believe that most of these views are just cognitive bias: sometimes things have the flavour we expect them to have. A bit like a comparison between eating the same steak in a beautiful Tuscan country house or in a fast food, it will always taste better in a Tuscan country house. At present, there is no evidence that a sustainable approach to work in the vineyard and in the cellar has consequences in terms of taste, but wine, as mentioned, is also made up of impressions...

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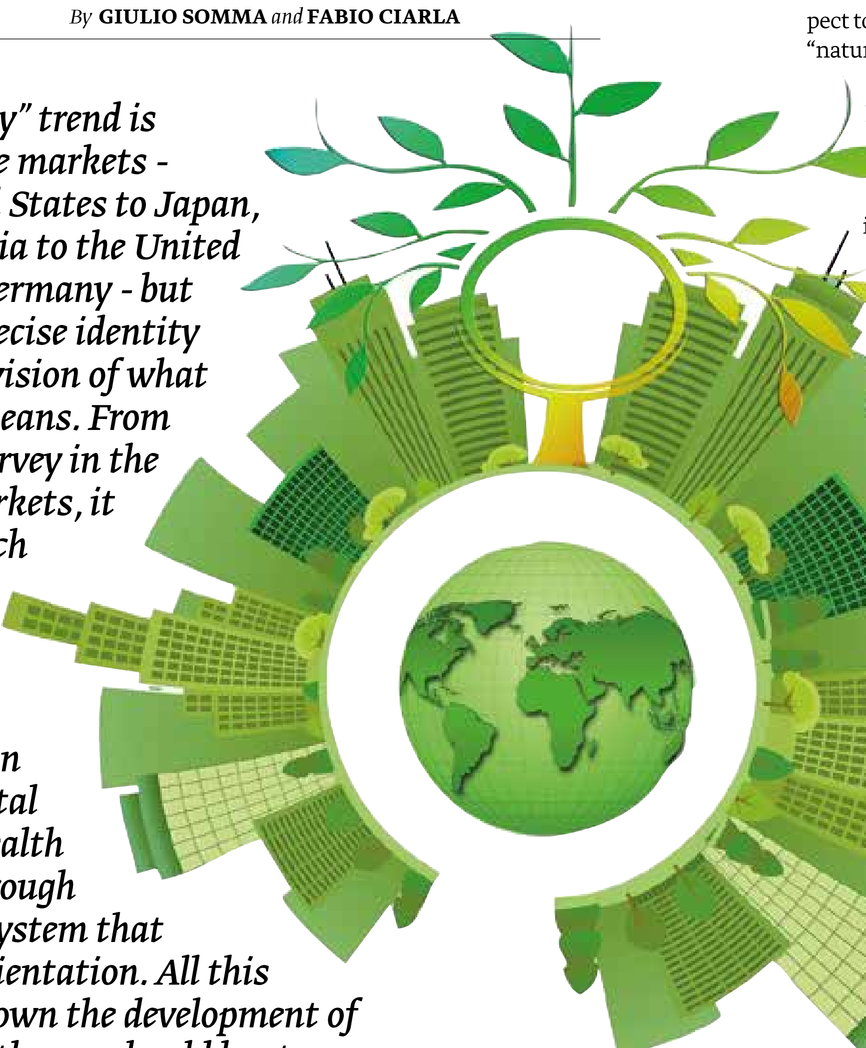
A SURVEY IN THE MAIN COUNTRIES CONSUMING SUSTAINABLE WINES

Markets Fancy Sustainability. But What Kind And At What Cost?

By GIULIO SOMMA and FABIO CIARLA

The "eco-friendly" trend is growing on wine markets - from the United States to Japan, from Scandinavia to the United Kingdom and Germany - but there is not a precise identity and a common vision of what "sustainable" means. From our exclusive survey in the main global markets, it appears that each segment of consumers has a partly different idea, from the focus on the environmental benefit to the health one, passing through a certification system that does not help orientation. All this seems to slow down the development of a trend that, in theory, should be strong and transversal. But today it is still struggling to take off, due to a price problem. Plus, the confusion on what kind of sustainability doesn't help clients open their purses



Rosé and sparkling wines are the two wines with the strongest growth. They have many nuances- of colour and production method - but they are easily and clearly identifiable by consumers. When the discussion moves to "sustainability," searching for a term that is as inclusive as possible, things get terribly complicated. For this reason, we explored some of the main world markets, starting with the USA with a double interview involving a large importer such as Winebow, and for the retail sales sector the Wine Outlet chain. The focus on the domestic markets of countries such as the UK, Japan, Germany and Scandinavia painted a very complex picture, which we described thanks to our correspondents and interviews with the operators of the sector.

Sustainability, which could be the broadest and most fascinating trend, does not in fact concern one or two types, but the entire world of wine, and seems to be slowed down by its many internal differences. In short, the global wine market- but perhaps it would be more correct to talk about the many markets that compose it- fails to give a precise and concrete identity to "sustainable" wines. Therefore, a specific movement capable of shifting balances and turnovers towards this category has not yet been created, and who knows when it will arrive.

To better clarify the different aspects, it is enough to think of a fundamental dichotomy: sustainable for the environment or more respectful of our health? Consumers often ask themselves these questions, sometimes making divergent choices like in particular in the Japanese market, where young people evaluate wine according to the lens of pollution, while their parents pay more attention to the effects on their body. It is quite clear that so different needs- the first one partly external to the product (which perhaps also pays attention to the packaging) and the second one exclusively internal to the wine-, can produce different ideas, also with reference to the commitments of producers and the certifications.

And we come now to the second huge obstacle that is slowing down the expansion of the category. The certification system is something very European, both by tradition and stratification of the rules. Certainly there are too many, but even if they were less, the discrepancy among consumer expectations would remain. Furthermore, for some less developed markets, wine is a "natural" aliment, no matter. There is therefore a need for a generalized growth of the wine culture in order to appreciate sustainability in wine, which will then have to take a decision on a most precise definition. Organic, eco-friendly, natural, vegan, no sugar added, all these terms are used in this specific area but, however, they do not help to clarify. It must be said that the production sector also has its heavy responsibility, too.

Even Scandinavia, the most friendly market for sustainability in terms of numbers and attitude, has troubles understanding the difference between organic and sustainable, despite a context of gradual and strong success in sales. In Japan the phenomenon is still quite small, but there is an interesting aspect to evaluate, the easy approach to the so-called "natural" wines, compared to static and often obsolete communication of more traditional products. Also here the problem of too many kinds of sustainability in the movement is real, while in the UK there is another problem - already described in the focus on the States - which is prices. The German market seems to have substituted the term "organic" with "sustainable," clearly signaling that consumers are more focused on the environmental aspect of wine production. Yet the problem of higher prices remains, especially in a market that largely sells cheaper wines. In most cases, organic or in any case sustainable wines–which several analyses of wine critics certify to be better than their traditional rivals- appear on the market at a higher cost than their competitors. This is a necessity, due to the bigger and more risky processes, which, however, could clash with a period of uncertainty and generalized increases, which could mean a further factor in preventing the explosion of the phenomenon.

And yet ... organic, sustainable, natural is appreciated. Basically, reversing the matter as in a mirror, we could say that despite all the difficulties of communication and the formation of a precise identity, consumers still love to choose a wine that appears more "green". In the hope that no one, or at least only a small part, will take a hint from this trend to join the movement with false credentials or just as a facade.

U.S. PROBLEMS AND OUTLOOK FROM IMPORTERS AND SPECIALIZED TRADERS

The Challenges of Sustainable Wines In The US

By GIULIO SOMMA and FABIO CIARLA

Health is more important than environmental benefits for US consumers, but sustainability alone is not always enough to justify higher prices. In interviews with Ian Downey (Winebow) and Jon Wiant (The Wine Outlet), sustainable wine is a active trend, but is not yet ready to boom and strongly influence the market

Winebow, a direct importer and large-scale distributor, is an authoritative point of reference for the US market, whilst the Wine Outlet, a wine shop franchise, is just as important having close and direct contacts with consumers. Interviewing Ian Downey and Jon Wiant therefore means trying to build quite a full and -that was not to be taken for granted- homogenous picture. American wine lovers like the concept of sustainability, but it is largely connected to health aspects than to the environment, with the exception of younger consumers. However, convincing consumers to spend more for a wine just based on that is much more difficult. Our interviewees explained how sustainability has a positive value, but not an absolute one. It is still seen as one of the upsides of a product, but not the main driver to purchase. If a wine is sustainable is good, but the brand and its quality come before any other aspect. Therefore making customers aware that sustainable wines are generally a little more expensive remains a challenge.

IAN DOWNEY

From Winebow

Ian Downey

"Interest is not yet translating into an equal change in behavior"

Having imported wine into the United States for 25 years, Ian Downey is a great expert in this sector. He has also been working for Winebow Imports for ten years, and in 2018 he became their Executive Vice President. The company was founded in 1980 and focused on Italian wines, but over the years it had a great expansion and today imports wine directly from 30 different countries, and distributes it across all of the United States.

In the US market, is there attention to sustainable wines? In which groups of consumers, in which channels of consumption and sale?
From a consumer and trade "sentiment" standpoint, there is both interest and some attention to sustainability in wine across most channels of trade. Retailers are making sustainable products available for their consumers, even making room for promotions and features highlighting these offerings. The On-Premise channel has environmentally interested restaurateurs, sommeliers, and patrons increasingly exploring what their options are. It should be noted that this interest is not yet translating into an equal change in behavior.

Is it possible to see whether consumers are willing to spend more on sustainable wines? What is the perception of consumers about the differences between organic - biological - sustainable - natural? There is a focus on sustainability certification and, if so, what is the most important, recognized, followed.
The attention and the interest have not fully translated into a full change in consumer behavior, to this point. There are consumption studies which point to the actual consumption rates of sustainable wine being far less than the %-rates of consumers who believe that sustainability is important to them. In general, we hear that consumers believe they would pay more for a sustainable product. However, in practice, the value-to-quality ratio is at the heart of most consumers' buying habits. This means that in order to pay more for a sustainable wine, a consumer will still need to believe that wine is delivering quality at some sort of value. If the price is raised to a level where the value-to-quality ratio is imbalanced, consumers are less likely to make that sacrifice when it comes to a luxury product, like wine. On the other hand, if a consumer is loyal to a specific brand or producer, they may be more likely to experiment and support sustainable offerings from that producer as the quality is known, even at a higher price. Sustainability is appreciated and even valued. The story is much more compelling when the sustainable story points directly to the quality experience. We have many winery partners (from Italy, Argentina, New Zealand, and other countries) who are elevating their commitment to sustainable practices. These sustainable releases are being well-received in the market, and we are encouraged that the category will continue to grow.

Is the shift towards sustainability more oriented towards environmental needs (therefore related to pollution) or health factors (therefore related to well-being)?
Most of the feedback we are hearing in the market is that sustainable farming and winemaking practices are attractive to consumers more for the environmental impact. Being good stewards to the land, and making a product that best reflects that stewardship is very appealing, particularly if that points to quality. I think most consumers agree with the notion that sustainable practices are generally tied to healthier living. But that is less quantifiable in most cases. An extreme example of an exception would be someone buying a wine because of the absence of sulfur in the farming and/or vinifying the wine because of an allergy. There are other trends, like low-alcohol wine, that are specifically geared toward health factors.

What are the most important aspects when it comes to sustainability, wine or packaging?
Because wine is an agricultural, luxury product the more compelling factor is the sustainable practices in the farming and winemaking processes. The packaging, though still an important commitment to sustainable business, does not distinguish the uniqueness of the wine or the producer in the same way.

JON WIANT
From The Wine Outlet

"It definitely seems there is a growing shift in the consumer's acceptance to organic wines"


Jon Wiant

After working in the wine industry for two decades, Jon Wiant created "The Wine Outlet" five years ago, a chain of wine shops that has built a name in Virginia. His knowledge of wine retail, import and domestic sales distribution make Mr. Wiant an expert in the sector. That is how he created a community-oriented shop dedicated to finding unique, quality wines from all over but also specializes in great customer values.

What are the most important aspects when it comes to sustainability, wine or packaging?
There seems to be more interest in the environmental qualities of the wine more than the packaging. Now to be fair, I run a local business shop that handles all types of customers but includes a fair amount of nicer wines that you might want to age for a while. The thought of cellaring a 2016 canned Barolo is amusing but not very realistic. I do occasionally counter questions about eco sustainable packaging and have brought canned and higher quality produced wines into the shop over the last 5 years but they have never sold quickly. Most of the attraction has been for portability and the idea of being able to bring them to pools, parks, and other places where glass is prohibited. Oddly enough there is more environmental concern for packaging from our beer customers even though there is no dialogue about the sustainable/organic ingredients of the beer itself.

Have there been any changes in the last year or are there any plans to move towards sustainability in the future?
The consumer influences a lot of the choices I make but also the growing amount of producers choosing sustainable wines as a standard is a large contributor as well. A large percentage of the wines I carry endorse sustainable, as well as organic, and a growing amount of biodynamic practices even if they have not completed certification or have chosen to skip the certification process and labeling.

Is it possible to see whether consumers are willing to spend more on sustainable wines? What is the perception of consumers about the differences between organic - biological - sustainable - natural? There is a focus on sustainability certification and, if so, what is the most important, recognised, followed.
It definitely seems there is a growing shift in the consumer's acceptance to organic wines. When we first started seeing a focus on organic wines here years ago the wines were higher priced and consumers questioned if there was a reason for the extra expense. Then we saw a large number of mid level and even budget wines using organics and touting their virtues for the first time.
Customers now appreciate that the wine is sustainable, organic, or even biodynamic and view it as an extra incentive to buy the wine, but the ultimate decision is still based on the quality of the juice. Natural wines fall into that at times but are often seen as their own category, and probably rightfully so in that they often have a different profile. It is easier to identify a natural Cabernet in a blind tasting than it would be an organic Cab for example.

Is the shift towards sustainability more oriented towards environmental needs (therefore related to pollution) or health factors (therefore related to well-being)?
As touched upon earlier, we do see growing interest in the environmental impacts but currently the majority of the customers asking about these wines are more interested from a personal standpoint. "Is organic wine healthier/better for you?" "Is it less likely to give you headaches?" These are some of the more common questions I encounter. On a related note I think one of the issues with sustainable wines in the US is an identity issue. Internationally there has been an effort through nonprofits like the Roundtable pushing for a global standard and definition of sustainability, along with trade organizations touting sustainability as a regional selling point (South Africa for example). To my knowledge there is not a domestic regulatory definition unlike organic and biodynamic (Demeter) which have a level of standard definition the consumer can find.

OPPORTUNITIES AND PROBLEMS FOR GERMAN WINE OPERATORS

"Sustainable" Is THE NEW ORGANIC

Germans are said to be strongly concerned about protecting the environment and stopping climate change. Do they act accordingly? During the past decades, organic wines have made many friends. Now the key word is "sustainable" wines. Yet in a market where €3.64 is the average price for litre, sustainable wines are still - and will keep on- having a hard time standing out

By **ROLF KLEIN**

Changing habits can take a lot of time. In the face of climate change (and even the current war in Ukraine), Germany remains the one country in the world with no speed limits on the Autobahn, and German SUVs are not slowing down, at least for the time being. However, there is a growing feeling that things must change. A growing number of consumers support regional farming and organic viticulture. This trend started more than 40 years ago, when Ecovin, the most important association of organic viticulturists, was established. The surface of organically managed vineyards has been growing steadily and amounts to nearly 10 percent of the total vineyard surface. It should be about 20 percent by the end of the decade. In the 1980s, many consumers regarded organic wines with suspicion, considering them to be rather "undrinkable." Not anymore.

Sustainability is a new keyword that made its appearance some ten years ago. It refers to the carbon footprint of all activities in an enterprise and can be certified by agencies such as Fair and Green e.V. (founded in 2013) and Dine (founded in 2011). The number of certified wineries is still comparably low. Organic viticulture is just one aspect of sustainability, which also includes social engagements, energy and waste management, as well as packaging. In a survey carried out among producers and trade professionals, many admitted that it may be difficult for consumers to understand the variety of organic and sustainability certification systems. Although most consumers probably do not know all the details that make a winery a certified sustainable winery, they feel that sustainability must be something positive, very much like organic.

However, it boils down to the question of "how much?". In their private wine purchases, Germans spend about €3,64 per liter, said the German Wine Institute. Consumers buy most of their wines in the food retail trade, with a strong share on hard discount stores. In these price ranges, wines can hardly be organic or even sustainable. But for those at least who have understood the need for a change in our habits, sustainability is a matter of broader significance.
"Sustainability is important to me in many aspects of everyday life," said **Monika Kellermann**, a food writer and wine expert. "That is why I prefer wines from producers who care about sustainability. Viticulturists who develop

sustainable strategies want to improve biodiversity, the quality of soils and water and thus make better wines. So I'm willing to accept a higher price if I know the producer works sustainably. It is fair to pay for his effort which not only helps him but also maintains our beautiful landscapes."


Monika Kellermann


Guido Walter


Jan Wolf


Martin Moser


Hans Rainer Schultz

It is essential to communicate the value of sustainability. Wine retailers have come to realise that there might be interesting stories to tell their clients. **Guido Walter,** owner of the Walter & Sohn wine shop in Munich founded in 2005, explained that the wines he is offering share a code.
"Our wines stand for fine craftsmanship and tell stories," he said. "Not just about the art of winemaking, but also about social, educational and sustainable aspects."
His wine shop has been certified by Fair and Green e.V., as one of several examples of wine merchants being certified. Another certified shop is Wein Wolff in Leer (Northern Germany), which was founded in 1800.
"We owe our existence over seven generations to our ancestors' sustainable way of thinking and acting," said **Jan Wolff**. "They have always combined economical, ecological and social ideas. I think that sustainability must begin in ourselves. It is not enough to offer good products. Everything we do must be seen under the aspect of sustainability so that future generations may continue our work in a healthy environment."
The incentive of the Fair 'n Green certificate is the requirement to continuously develop and improve sustainable strategies. At Wein Wolff sustainable wines (from certified producers) are available from €6,95 to €11,45 - a decent price range.

"We care for our environment,"echoed **Martin Moser**, who runs a Webshop named Grape-Times. "That's why we love organic and biodynamic wines. But our producers are not the only ones to work sustainably. We also try to minimise our carbon footprint by compensating the CO_2-emissions caused by our logistics through climate initiatives. For every order over €50, we plant a tree."
The wines they offer come from Germany, Austria, France and other countries. In order to keep their carbon footprint small, they do not offer wines from overseas.

Hawesko, the leading mail-order wine company, does. They offer wines from California and other regions certified by the Sustainable Winegrowing Program. In California, over 170,000 hectares are being cultivated by members of the Sustainable Winegrowing Program, said **Konstantin Baum**, a Master of Wine and expert on wines from California.
"The fact that such a huge surface – which is nearly twice the total vineyard surface of Germany – is engaged in sustainable viticulture really makes a difference," he said. "It is the biggest initiative worldwide. Californians are very open, as they have experienced the devastating effects of climate change."
It is unclear, however, if wines from California have enough market share to be of much influence.
"You can't taste the difference," Mr. Baum said. "But if you choose sustainable wines, you contribute to protecting our environment and enabling future generations to continue growing plants and vines. You help make sure there will be a future for winemaking. You can't save the world by buying just a bottle of sustainable wine. But it is a step. If producers understand that consumers prefer sustainable wines they might change their strategies."

In Germany, retailers often offer a selection of sustainable wines, but also have many more wines in store that are not certified. Natürlich wein is a webshop specialised on certified producers from Germany, France and Italy. They have all been certified by Fair and Green e.V..
"We want to demonstrate that sustainability does not just concern winemaking but also sales," said **Hans Bader,** who argued that even his shop is sustainable.
Another crucial sector is the Horeca channel. Currently, restaurant owners may have problems just surviving, due to the pandemic restrictions. But in the long run, it may be worthwhile for them to offer sustainable food and beverages. Again, it will take great efforts to convince their clients they should pay more for a glass of wine because it is filled with sustainable wine. Germans, who do not hesitate to annually throw billions of coffee-to-go cups into their litter boxes, are reluctant about spending too much money on food in restaurants. However, there is a growing awareness about the waste of food, especially among younger consumers. Some restaurants have joined the "No Waste" initiative, trying to reduce the waste of food, packaging and all kinds of material. In making a restaurant sustainable, wine is just a small contribution, but one that is an easy way to tell a story.

Sustainability has already reached the shelves of the food retailers. F.W. Langguth Erben, located in Traben-Trarbach on the Mosel River, is one of the pioneers of branded wines in post-war Germany. The Erben range, initiated in 1964, is one of the leading brands. Turnover last year was €73 million. They are about to focus on sustainability in their cellars and have installed 4,000 m² of solar panels. They have launched a number of organic brands such as Sontino Bio-vegan, The Flower Pot, and Footprint. The aim of saving our planet can only be reached by a huge and common effort, said Prof. Dr. **Hans Rainer Schultz**, the president of the renowned Geisenheim University during a meeting of delegates of the Great Wine Capitals.
"We need a global initiative by the wine industry," he said.
It will take many players, and especially big players, to make things – and our consuming habits – change for the better. It is a choice. Our choice.

THE ENVIRONMENT INSPIRES THE YOUNG. HEALTH INSPIRES THE ADULTS

Why Japan Likes Sustainable Wines

It is not a mass phenomenon yet, but sustainable wine is however important for the Japanese market. Its significant growth outnumbers other kinds of wine, although there is a bit of confusion between organic and sustainable

By MARI YASUDA


Hiromichi Matsumoto


Yasushi Tamura


Motohiro Okoshi


Grande Cave of Isetan


Yasuko Goda


Masaaki Tsukahara


Hayato Takahashi


Michiko Iwamuro

According to a consumer survey by the Consumer Affairs Agency of Japan in 2019, which collected about 2,800 replies, among the terms "Eco", "Lohas", "Fair Trade", "Sustainable" and "Ethical Consumption", the most recognized term is "Eco" with 72.6% of respondents' recognition. On the other hand, only 15.3% replied that they know the term "sustainable". It can be said that the level of recognition of the term "sustainable" is relatively low in Japan. In the world of wine, it seems that the majority of consumers have an image that sustainable wines mean organic wines. An "organic wine corner" in some supermarkets proves this. Only wine connoisseurs can relate sustainable wines to biodynamics. Some consumers may have an image of them as natural wines.

Approachable Organic Wines

According to the survey by Mercian Corporation, a leading wine importer in Japan, overall sales volume of organic wines in Japan in 2021 recorded a 20% increase from that of the previous year and accounted for around 3% of the total wine sales.

Cono Sur from Chile is a good example. Cono Sur is one of the major brands of imported wines and its organic series boasts the largest sales volume among the imported organic wines. Smile Corporation imports mainly Cono Sur and other wines from around the world. "We introduced Cono Sur organic series in 2004," said **Hiromichi Matsumoto**, General Manager of the Liquor Marketing Group of Smile Corporation. "In the following year, the sales exploded. Consumers highly evaluated its price level and taste".

The retail price of the organic series is around € 9, which is 31% higher than that of the basic series "Bicicleta". After Cono Sur, Smile Corporation started to import other organic wines from Argentina, South France and Italy to enrich their offer. The retail prices of these wines are set at almost the same level of those of Cono Sur Organic wines.

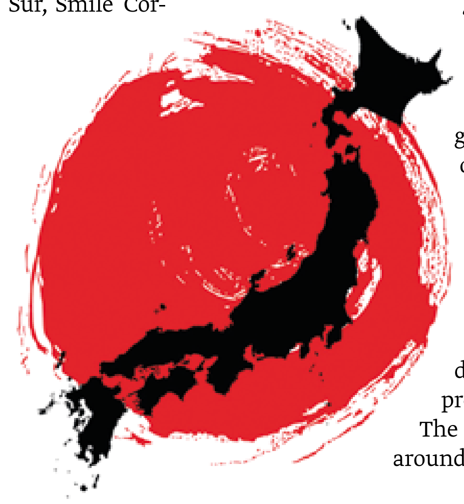
"The total sales volume of these four organic producers' wines in 2021 increased by 3.8% from 2020," said Mr. Matsumoto. "Compared with those of 2019, a pre-Covid year, it recorded a 30.7% increase".

The main sales channels are the mass-market retailers such as supermarkets. Consumers with a wide range of age purchase these organic wines.

"Though we do not have a statistic, we feel that consumers in their 50s and 60s purchase organic wines because they care about their health," he said. "When we place an advertisement for organic wines, we have inquiries by phone from consumers in their 50s and 60s. They want to know where they can buy our organic wines. They seem to have so much interest. Perhaps, younger generations think more about the environment rather than their health."

Hierarchy Of Organic Wines

Organic wines with approachable prices are not the only ones to constitute the organic wine market. Mavie, founded in 1998, is a retailer specializing in organic wines, the first one in Japan. They import organic wines from producers who engage in the whole process from grape growing to bottling by themselves and sell them via their own retail shops. Also Mavie wholesale their wines only to liquor shops and restaurants who have a temperature-controlled cellar.



"In the EU regulation of 2012, which laid down detailed rules regarding organic wines, the usage of sulfur dioxide and yeasts, or heat treatments were permitted," said **Yasushi Tamura**, President of Mavie. "Our products make a clear difference from those products."

The main price band is around € 23.

"Primary customers are those who have higher annual incomes, such as doctors or lawyers in their late forties to sixties, and have a good palate," he said. "Such customers know well that Michelin-starred restaurants in Europe stock good organic wines; therefore, they do not see organic wines as a one-rank-below product. Also, they know well that good wines are expensive. There is a price hierarchy in the world of organic wines, like in all wines. Our company targets the upper parts of this hierarchy. The world of organic wines is like a mountain which includes various sectors such as natural wines or biodynamics. And this mountain should be as high as possible, because the higher the summit is, the wider its base will be."

The Natural Wine Market

There is no detailed data about the sales of natural wines in Japan, but this market cannot be overlooked. It seems that it is gaining support of the young generation. **Motohiro Okoshi**, the owner sommelier of modern Vietnamese cuisine "Ăn Đi", one of the very popular restaurants in Tokyo, noticed that young people in their late twenties and thirties wanted to drink natural wines. Mr. Okoshi got his wine education in France for three years, then he served as chief sommelier in L'Écrin, a fine dining restaurant in Ginza Tokyo, for four years. After that, he became independent as a wine taster/wine consultant. He continues to collect the updated information on wines from all over the world and offer many wines consulting services.

"People who have been drinking wines for a long time do not know the term 'natural wines'," Mr. Okoshi said. "On the other hand, the younger generation knows this term. They come to us and say that they have tasted a natural wine somewhere and it was delicious, although it is a problem that they do not know the exact meaning of natural wines."

Why has the consumption of natural wine expanded? Mr. Okoshi said that the price of classic Bordeaux or Burgundy wines skyrocketed.

"As a result, the current young generation cannot afford these wines," he said. "On the other hand, an increasing number of bistros or restaurants offer natural wines. There, the young generation learned the taste of natural wines which are juicy and approachable. Classical wine lovers tend to be wine snobs, and this keeps the neophytes away from wines. Natural wines, however, do not require a complicated tasting manner. Natural wines can be enjoyed easily and casually. This may appeal to the young generation".

"Also, there is a demand for natural wines with high quality," he continued. "A wide price range of natural wines are requested, though there is a limitation."

Racines is an importer who handles fine wines, mainly natural wines. They pay close attention to the whole process of transportation, storage and distribution. They wholesale their wines only to liquor shops and restaurants who can control the temperature of the storage. Their view supports the expansion of natural wines in Japan. It was in 1998 that they imported natural wines for the first time.

"In 1990s, many young wine producers in France started to produce natural wines which can be called Second Generation natural wines," **Yasuko Goda**, co-Managing Director explained. "The youth with an edgy sense in Paris enjoyed these wines, saying "We were waiting for these kinds of wines. We were so excited!". Their wines brought forth a new market. In the 2000s, Bistoronomie (a contraction of "Bistro" and "Gastronomy") in Paris started to serve many natural wines. At the same time, bistro & wine bars who offer delicious dishes, created a movement. Some Japanese, who experienced these movements in Paris or worked in the wineries, started up bistros and offered various natural wines when they returned to Japan. Young generations, especially those in the fashion industries or designers, hang out in such bistros. Natural wines have expanded in Japan in such a way".

"People who produce natural wines, people who sell them, people who serve them, all those people are young," echoed **Masaaki Tsukahara**, co-Managing Director. "Perhaps, they find a kind of contemporary feeling in wines."

"We do not select wines from the viewpoint of sustainability," Ms. Goda added. "We look for delicious wine, and in this sense, we think organic viticulture is required; however, to what extent the organic viticulture is carried out is based on the policy of producers and depends on the climate conditions and other factors".

Currently 90 to 95% of producers Racines imports from is doing sustainable viticulture such as organic or biodynamic, of which around half is making natural wines.

Diversification Of Appeal Points

Some sales sites highlight organic, biodynamic or natural wines. However, others do not highlight them so much. This is based on the idea that sustainability is just one of the appealing points. Isetan is a major department store in Japan. The wine shop "Grande Cave" is located in the flagship store of Isetan in Shinjuku, downtown Tokyo. The shop offers around 1,900 items of imported and Japanese wines. On the price tag, the term "organic" is written in yellow, but there are no other tags to promote organic or sustainable wines. Several sommeliers are all at hand to advise on wines by discussing them with customers. **Hayato Takahashi**, a wine buyer of Grand Cave, said that a story of each wine is important in the advice to customers.

"In the department store, around 70% of demand is for gifts," he said. "In fact, last year when it was difficult to gather together due to the state of emergency, the demand for gifts increased. Customers chose wines based on a story which would delight their important person. Sustainability is just one of these stories. Which story will appeal depends on customers' preference."

In a shop which does not have

face-to-face sales, it is required to pick up the effective information for the limited size of POP (Point of Purchase). Meidi-ya is a supermarket who imports and retails alcoholic beverages together with manufacturing, importing and retailing of foodstuffs. Founded in 1885, Meidi-ya is a long-established store. They have their shops across Japan, but also sell their products and imported ones to the distribution network.
"In a business talk with buyers of supermarkets, we explain each winery's effort as a brand story," **Michiko Iwamuro**, manager of the wines & spirits division, said. "For example, this winery changed to sustainable farming four years ago. However, at the shop, customers choose wines based on the information on the limited size of POP; therefore, we should prioritize which items to be included on POP. In our store, customers still look for wines based on a country, taste and price, so we include them as a top priority. As the needs of consumers diversify, appeal points are diversified, too."
The importance of certification is controversial. Mr. Matsumoto of Smile Corporation said, "A mass-market retailer needs a certification because they should be able to provide a proof to consumers when they have an inquiry".
"A certification is one of the added value and it will increase the appeal to consumers," Ms. Iwamuro of Meidi-ya explained. "A certification other than organic, such as Terra Vitis, is not well recognized in Japan. We think that the EU leaf mark has a certain visibility; therefore, we show it on POP and in our catalog."
On the other hand, there is an opinion that a certification is not necessarily required.
"With or without a certification is also one of the stories," Mr. Takahashi of Isetan said. "An example of such a story is that this producer cultivates vines in an organic way but does not get a certification because it costs money and can attract a customer."

Future Of Sustainability

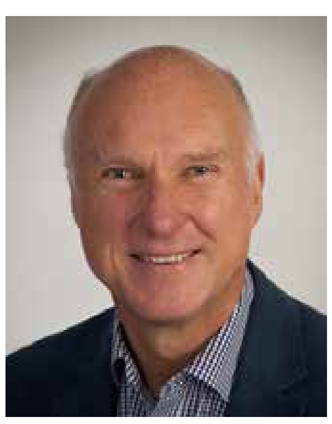
It is deliciousness that has supported the development of organic and natural wines.
"We never followed the movement of organic wines," Mr. Tsukahara of Racines said. "For more than 30 years, we have looked for excellent wines and found that being organic is a source of such wines. Both organic viticulture and perfection of taste should be required."
Kazuhiro Nomura, Deputy General Manager of the Liquor Marketing Group of Smile corporation also said that they selected wines based on taste rather than being on organic. Even though wines are made in a sustainable way, if those wines are not delicious, importers and sommeliers will not select them.
From the wider viewpoint of sustainability, it seems that an interest in the reduction of greenhouse effect gas or fair trade is still limited.
"We have inquiries about wines in tins or small paper boxes from large supermarkets and convenience stores," said Mr. Nomura of Smile corporation. "Although we cannot react to it yet".
A broad perspective of sustainability is expected in the Japanese wine market.

After years of marketing on definitions and certifications, the British market has finally opened up for sustainable wines. It now has to face the more general price hikes that are likely to reduce their market share

IN THE UK, PRICES WILL DRIVE FUTURE WINE PURCHASES

Sustainability Is Trendy, But Price Still Matters

By **TOM BRUCE-GARDYNE**



Richard Bampfiel

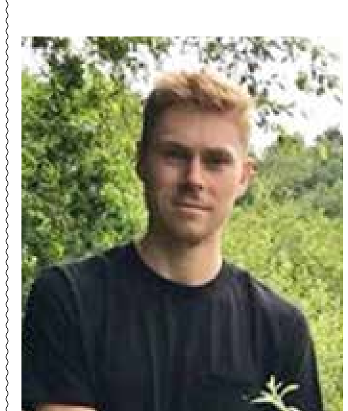
Neil Palmer

Marloes Klijnsmit

"If I was being cynical, the UK consumer is not that interested whether a wine is organic, made sustainably or ethically. They are far too obsessed with price," the late **Michael Cox**, told me in 2012, when he was running the trade body Wines of Chile.
Ten years on, with ever greater awareness of climate change and its impact on the planet, such attitudes have evolved somewhat, certainly for a younger generation of drinkers. That said, confusion abounds.
Lidl's UK wine consultant and Master of Wine **Richard Bampfield** put it simply.
"As far as I know, the consumer research indicates that organic is the only sustainability-related word that has any real resonance with the wine public," he said.
Organic wines began to appear in British supermarkets some twenty years ago, but for a long time they remained a small niche. One of the early pioneers was **Neil Palmer,** who co-founded the specialist organic wine wholesaler, Vintage Roots in 1986 when "no-one even knew what the word organic meant," he said.
"But I think in the last three years there has been a big step change," he said. "It's definitely become quite a bit more popular."
According to Nielsen, retail sales of organic beers, wines and spirits grew by a third in 2020, while in the six months to September that year, organic wines were up 54% in Waitrose, 45% in Aldi and 41% in Sainsbury's, to quote three supermarkets tracked by Kantar Research.
Whether this will prove to be an enduring trend and not a fleeting response to the unique circumstances of the pandemic, remains to be seen.
"The UK organic sector has always benefitted from food scares like mad cow disease, and GM crops," said Mr. Palmer, adding that maybe Covid has had the same effect.
Vintage Roots has supplied supermarkets in the past, though always found them to be somewhat fickle.
"They'll tick the organic box, but there's no long-term commitment," Mr. Palmer said. "Next week's fashion might be different and they'll jump on that."
Yet there is a burgeoning interest across all trade channels, and in response, Liberty Wines, a leading UK supplier to top restaurants, independent wine shops and the big chains, has quadrupled its range of "practising organic" or "certified organic" wines since 2017. Today they account for a quarter of the 1,322 wines listed by Liberty.
Consumer engagement depends on the setting, as **Marloes Klijnsmit,** the firm's senior brand manager, explained.
"In wine bars people are open to trying things different from the norm and can chat to the guys behind the bar," she said."While a lot of restaurants are focussed on sustainability. Where the menus are locally and seasonally-sourced, having a wine list that's organic and sustainable will be equally important."
At the Humble Grape, a chain of five London wine bars that also retail, the wine buyer **Will Hill** said.
"The producers we work with all tick certain boxes on sustainability whether it's organic, biodynamic, off-setting carbon, using solar power, or whatever," he explained. "We dig for that information and pass it on to the consumer. What matters is that it's sustainable, you don't necessarily have to drop the word 'organic.'"
Sustainable viticulture usually entails an added cost which Hill believes Humble Grape customers are happy to pay.
"If anyone queries the price, we explain it's the nature of the wineries we work with," he said. "It's about caring for the environment and we don't want to put a price on that."
But overall, there is little evidence that UK consumers are prepared to pay a premium for wine labelled organic, despite being content to pay considerably more for organic vegetables. That is certainly true in supermarkets where Waitrose buyer, Master of Wine **Barry Dick**, works.
"I think there's a perception that all wine is organic, and that's the challenge to overcome," he said.
He believes consumers are completely unaware that there might be any extra costs involved.
With no one there to explain a wine's sustainable credentials as there might be in a wine bar or an independent specialist, the messaging relies heavily on the label in the big chains.
But with organics, "there's a million different accreditations and a bunch of different logos," he said. "With no global standard, I think it's desperately difficult to communicate with consumers when we're not aligned very well."
Waitrose, like its rivals, "is committed to improving its environmental position at a corporate level," said Mr. Dick.
At the supermarkets, the drive for sustainability has shifted towards packaging and transport, and being responsible for the company's bulk sourcing.
"If we can increase our proportion of wines that are bulk shipped," he said. "That will have a huge impact on Waitrose's carbon footprint."
In 2019, 40% of the UK's wine was shipped in bulk for bottling here, an increase of 50% in a decade. The original motives were around efficiency and driving down costs, and perhaps they still are, but the talk is increasingly about sustainability. Compared to shipping bottles, a flexi-tank can carry twice as much wine per container and thus result in half the CO_2 emissions per litre, or so the argument goes. You can then use lighter bottles on arrival to reduce CO_2 still further.
Bag-in-box, which accounts for 60% of wine in Sweden, is claimed to be even better for the planet, albeit nothing as recyclable as glass.
"Although things may make sense from a purely sustainable point of view, we've got to remember the consumer has to have a degree of acceptance," he said.
Other formats include pouches, Tetra Pak and wines on tap in bars, but there's a long way to go. Bag-in-box has just 3-4% of the UK market at present. Maybe some really premium producers can get on board to increase acceptance, though it is hard to imagine a sommelier carting around a bag-in-box and offering diners "another squirt of Sassicaia" for example.
"There's a growing interest from our customers," said **Simon Zuckerman**, a buyer at Berkmann Wine Cellars. "From the multiple off-trade right through to independents and the on-trade to know more about the sustainability credentials of the wines we work with."
But he feels "consumers need something easy to latch on to, and 'organic' is one of them."
Discussions around low-carbon packaging are confined to the trade.
"I'm not sure how many restaurant-goers look at the wine list wondering how much each bottle weighs," he said.
Light-weight glass and UK bottling are issues that float way

Will Hill

Barry Dick



Tom Owtram

above consumers' heads, but people might notice if bulk shipping reduces the choice of wines available as the system clearly favours volume via the country's four big contact bottlers. Where this leaves those producers and regions that lack the scale or inclination to ship in bulk is unclear, and the same goes for those European wine appellations like Prosecco DOC which stipulate bottling at source.

Sustainable Wine Ltd describes itself as a purpose driven business with a mission - 'to make sustainability mainstream in the wine industry'.

"It is very complex and very difficult to maintain momentum with such an all-encompassing word," **Tom Owtram**, the firm's outreach & development manager, admitted. "But that's no reason not to do it. I think it will definitely be industry-led, but the educational piece with consumers is very important because it's how we can support them to make better choices."

Meanwhile the poor consumer is being bombarded with buzzwords from "organic" and "biodynamic" to "free-from", "vegan", "net-zero", "low-sulphur" and, that most loaded of terms - "natural wines", all sheltering under the big umbrella of sustainability. And with costs escalating everywhere from the vineyard right through the supply chain, just as we are being squeezed financially by soaring energy bills, we might all become a little price-obsessed.

NORTHERN EUROPEAN COUNTRIES PAY ATTENTION TO THE ENVIRONMENT AND ECO-FRIENDLY PRODUCTS

Sustainable Wines Are In High Demand – And Some Confusion

By ASA JOHANSSON

In Norway, Sweden, and Finland, the State Monopolies that regulate the sales of alcoholic beverages have a significant focus on sustainability. So does Denmark, which is a hub for natural wines in Scandinavia. Yet understanding and explaining the differences between organic and sustainable - and their national and international certificates - is not a simple task

In the Scandinavian countries, especially younger consumers are exceptionally aware and concerned about the environment, creating a growing demand for sustainable and ethical wines. Consumers care about the origin of imported wine and production methods, distribution, and certifications. In Sweden, sales of organic wine increased by 3.3 % during 2021 and 25% of all wines sold during 2021 in the approximately 400 monopoly stores, called Systembolaget, were certified organic. In Norway, the sales of organic products have doubled in the last ten years. In Denmark, it is more difficult to find precise statistics, but the organic trend is gaining ground there, too.

"In Denmark, about 80% of wine sales are in supermarkets," said **Ole Udsen,** Danish wine importer and wine writer. "This segment does not focus on sustainability, but much more on price. For the remaining 20%, there is at least a segment into sustainability. However, it may have fairly foggy notions about what sustainability really is."

Most Important Topic To Come

In the last few years, the interest in organic wine in Sweden has increased, and so has the sales. But what does the future look like in Sweden for Systembolaget's customers? At Systembolaget, with over 13,000 different wines, 2,000 are certified organic. The price range for sustainable wines is mostly around 8-12 euro for 75- ml bottles.

"Almost all tenders have criteria involving sustainability in some way," said **Margareta Lundberg** from the wine importer Handpicked. "Systembolaget just introduced a new sign on the shelves called sustainable choice, and the certification includes agriculture, production, packaging, and social responsibility. To get this approval, you need to apply the wines which fulfill the requirements."

Reading the Swedish monopoly's sustainability report, you understand that Systembolaget has set up a list with the most important goals to reach in 2030. The strategy is similar in Norway. The goals were set up by choosing the seven most important categories from the United Nations' 17 sustainable goals. The seven goals selected by the Swedish Monopoly are the following: Good health and wellbeing, Equality, Decent working conditions and economic growth, Reduced inequality, Sustainable consumption and production, Combating climate change and Significantly decreasing all forms of corruption and bribes.

Which of these will be most important for Systembolaget's customers? Will some goals be more important than others for the Swedish market?

Erica Landing-Löfving, a well-known and appreciated consultant specializing in sustainability and sustainability communication in the food and wine production chain, is quite clear about which goal will get the most attention for the Swedish customers.

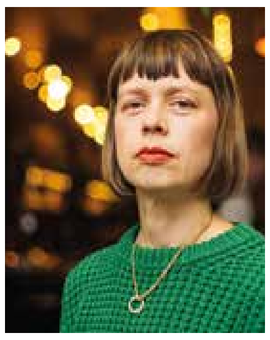
"The consumer is mostly concerned about sustainable


Ole Udsen


Margareta Lundberg


Erica Landing-Löfving


Martin Wall.


Maria Collsiöö


Marius Odland


Nana Ward

production," she said. "Expecting Systembolaget to take a holistic approach and responsibility while asking for clearer guidance to find products that meet higher minimum requirements and help identify additional sustainable choices. Different consumer groups will have different views on the most important parameters (water, CO_2, social aspects, pesticide use). Still, I think the focus will be greater on what is happening in the vineyard than in transport or production, even though transport has the greatest impact on carbon footprint."

Systembolaget instead thinks that there will be more than one goal that will have a significant impact on their customers.

Systembolaget's press office said that they worked on a project to make the UN's 17 sustainable goals the highest priority for their business, and their current focus was on the four goals of Decent working conditions and economic growth, Reduced inequality, Sustainable consumption and production and Combating climate change.

This new certification called sustainable choice has created discussions in Sweden. According to the small wine importer Vinonista and owner **Martin Wall**.

"Unfortunately, there's only a small part of the wines in the Monopoly that are allowed to get this certificate," he said. "The Monopoly has made up their sustainable certificate instead of using those valid in Italy or Europe. To get your wines marked as sustainable choice the wines need to be in the ordinary assortment."

The ordinary assortment is composed of around 2000 wines that are chosen through a tender set up by Systembolaget. These wines are low to medium-priced in most cases, and the tenders require a certain number of bottles. Criteria that can be hard to fulfill for small scale importers working with artisanal wine producers. The smaller importers in Sweden can list the wines that do not win a tender at Systembolaget, in a segment called the order segment. This makes it possible for customers to order these wines directly from the importer but for most consumers this seems complicated. And as said above these wines can not apply for the new certification "sustainable choice" created by the Swedish Monopoly.

Sustainable and organic compared to conventional wines

There are also different opinions about why consumers choose organic or sustainable wine instead of conventional wine.

"The awareness of packaging is growing due to the information campaign from Systembolaget," **Maria Collsiöö**, editor in chief at the Swedish wine magazine Törst, said.

Packaging is attracting the most interest, according to Systembolaget's press office, because of its major climate impact. But the discussion on the definitions of sustainable wine and regulations for organic farming, social responsibility, are hot topics.

"The certification of the wine is the most important," said **Marius Odland**, a wine expert in Norway. "Packaging is more about being practical. PET bottles seem to be decreasing due to the global issue about plastic."

The shift towards sustainability-oriented wines has to do with both environmental needs, related to pollution, and health factors, consequently associated with keeping a healthy lifestyle.

Ole Udsen says that there is a great confusion about what sustainability actually means in Denmark.

"For instance, there is a constant and automatic conflation of organic agriculture with sustainability," he said. "When there is no such automatic link in reality (science tells us, for example, that much organic agriculture has higher CO_2 emissions per produced unit than conventional agriculture, as a function of lower yields and more frequent interventions). From my experience with customers, the packaging (unfortunately) has very little focus, while the agriculture and the wine itself are more important. I have not conducted surveys of Danish consumers, so I cannot say for sure that wine or agriculture is the most important aspect."

In Denmark, the interest in organic wines has increased in the last ten years, going from being an absolute niche and hard to sell to having an important place among other sustainable consumer goods.

"Ten years ago, wine shops were nervous about sales on organic wine," said Nana Ward, a Danish wine writer and consultant. "It was considered something only appealing to a narrow group of consumers. At that point, wine was still a conservative product, this has changed dramatically. The young generation demands sustainability, so there is a rapidly fast-growing market and segment among consumers."

According to the persons in this article, there is great confusion in all countries between sustainable and organic certifications.

"The consumers are really confused about the different certifications," Ms. Lundberg said. "Add vegan and biodynamic, and they get even more confused. The EU regulation (the leaf) and Demeter, are the most important certifications."

Ole Udsen, Danish wine importer and wine writer, means it is the same thing in Denmark.

"The 80% (supermarket consumers) do not generally have a clear notion that there is any difference between the different certifications indeed," he said. "Some will not even know that there is something called 'natural wine,' while some conflate orange wine automatically with natural wine, or organics with sustainability."

"A state-controlled Danish certificate is seen as very trustful," **Nana Ward** confirmed. "Certificates are guarantees people rely on, but many of the certificates are not so well understood. Demeter is well recognized, but mostly from fruit juices, detergents and cosmetics."

Are Customers Willing To Pay More?

How much are consumers willing to pay extra for a sustainable or organic certification?

"As long as the quality of the wine is the same, the consumers are willing to spend more," said Margareta Lundberg from Handpicked.

Systembolaget thinks that the customers are willing to pay more but says it is difficult to give a percentage of how much more that would be.

Norway also follows the same trends as Sweden. The organic products at Vinmonopolet have doubled in the last ten years, and Italy is the top country before France when it comes to organic sales. But according to Marius Odland, importer and former wine writer, "Very few consumers will spend more on a bottle of organic wine, even if they say so. The information to be able to make a choice is not within the average consumers' knowledge."

ORGANIC AND SUSTAINABLE WINES ARE GROWING

Are Consumers Ready To Pay More?

Organic wine is growing in numbers and quality. But do we know how to communicate it to wine drinkers? And are consumers really interested in organic and sustainable wines?

by **PIERPAOLO PENCO**
Wine Business Management and Marketing Professor at MIB Trieste School of Management

Moved to mid-January, instead of the traditional appointment at the beginning of December, the tastings for the Mundus Vini Biofach competition, which I attended as a judge, confirmed how organic wine is consolidating in numbers and quality of offering. The International Grand Prix of Organic Wine Mundus Vini Biofach is an international competition organized in Germany by Meininger Verlag for organic wines from all production areas in the world. And never as this year, have we had the opportunity to blindly taste organic, biodynamic and sustainable wines from many producing countries, with a growing presence also from Eastern Europe up to Georgia and the New World, with several hundred samples presented. The competition results will be presented in July at the BioFach Fair in Nuremberg.

By participating in these tastings for some years, I have been able to witness firsthand both the average qualitative improvement of the wines presented at the Competition (the defects associated in the past with organic viticulture are now an exception) and the greater credibility that these wines collect from critics. and operators (the competition jury is made up of a mix of journalists, tasters, professionals, distributors and retailers). It confirmed what has been analyzed by two separate studies which, in recent years, have analyzed the scores of 200,000 wines provided by independent critics both in California and in France, and demonstrated that wines produced from organically or biodynamically produced grapes, taste better.

What the studies have also found is that there is also a marked increase in the quality of wines produced with organic grapes or from biodynamic agriculture, as noted on the basis of the evaluation by wine critics, which although recognized among wine producers, was not necessarily communicated effectively to consumers.

But Who Drinks Organic Wine?

In January, on the occasion of the Millésime Bio fair in Montpellier (the largest b2b event dedicated to production from organic farming), the European Observatory of Organic Wine Consumption presented a research carried out at the end of 2021 by Ipsos, interviewing 3,000 people from 18 years and older (1,000 for Germany, 1,000 for France and 1,000 for the UK).

Western Europe consumes less and less wine. 82% of the Germans, British and French interviewed said, in 2015, that they had consumed wine in the last six months. Only 73% of them did so in 2021. At the same time, the segment of more environmentally friendly wines is on an opposite trajectory. More than a third of French consumers (36%), for example, said that they regularly, or occasionally, drink bottles of organic wine. Consumption of these drinks has even increased, as only 17% of French people purchased organic wines during the first study of this type six years ago. A quantitative leap that can be observed in Europe, even if the French are much ahead of their neighbors: 23% of Germans and 27% of British have added these wines to their cart.

This growing interest in organic, biodynamic and sustainable wine has several explanations. The first is linked to the concern to preserve the environment. 54% of the respondents believe that the production of organic wine is more ecological than that of conventional wine. The second purchase lever lies in the curiosity aroused by "green" wine, of which 40% want to taste. Finally, 35% of the interviewees are ready to buy organic wine because it would favor a production sector considered more equitable, especially in terms of job creation.

Today, we have moved from consumption out of curiosity to permanent consumption, and organic wine producers have many reasons to be optimistic about the future. The survey shows that the organic wine lover is quite young (less than 35 years old) and urban, with an above average purchasing power. As a consequence, he agrees to put his wallet in his hand to pay an average of 14 euros per bottle (compared to 11.70 euros for a traditional wine). This shows that he is ready to pay more when the product respects the environment, reassures its traceability and guarantees better remuneration for producers.

There are many ways to solidify this breakthrough in organic wine, starting with consumer education, since 38% of respondents believe they do not have enough information on products. Therefore, in all communication materials, from labels to the web, on digital and social channels, during winery visits and fairs, it is important to provide clear information, consistent with the corporate identity and the goals that led to choosing organic production. It's really a strategic and not just a tactical element.

Does Organic And Sustainability Matter To Wine Consumers?

The concept of sustainability – in all its forms and definitions – has become a powerful driver of consumer sentiment in recent years. Those trends have taken root in the global alcohol industry, and for good reason. According to data collected for the IWSR Covid Tracker 2021, nearly half of American adult drinkers of beverage alcohol (48%) and 70% of Chinese alcohol drinkers said they were "positively influenced" to buy brands that had demonstrable environmental or sustainability credentials.

The history of sustainability and wine goes back longer than most industries. Organic wines have been a feature of upscale restaurant wine lists and independent stores since the early 1980s. Thanks to strong advocacy from its state retail monopoly, Systembolaget, organic wine in Sweden accounts for almost 1 in 4 bottles of wine sold in that market.

More recently, the wine category has witnessed further developments of sustainability. These include biodynamic and natural (or low-intervention) wines, which take the concept of sustainability down to a fairly basic level by allowing natural fermentation processes to take place free of any chemical inputs or selected yeasts. A number of wine-producing countries and regions have also set up their own sustainability standards, and used their marketing muscle to incentivise producers to comply.

As one might expect, wine consumers are at least as keen on sustainability in general. In the latest Strategic Report, "Opportunities for Alternative Wines," Wine Intelligence found that between 56% and 67% of wine consumers across major wine markets (US, Canada, UK, Sweden and Australia) had a high connection with sustainability in general, judging from their answers to a number of statements about the subject.

However there seemed to be a disconnect between their broader attitudes to sustainability and their willingness to translate this desire into their wine purchasing behaviour. Among all regular wine drinkers, the willingness to pay for more sustainable wines, or to opt for sustainable wines given the choice, fell to around a third of drinkers across the same markets.

This discrepancy between what consumers say that they would like to do with regard to the environment and sustainable products, and what they actually do, may depend on a variety of factors, including social influence (people copy habits of others), the domino effect (people like to be consistent) and pitching messages that resonate at both a rational and emotional level.

Getting people to buy in a sustainable way remains a major challenge for the wine industry, as there are plenty of reasons to revert to less sustainable alternatives – the (typically) higher price being one of the key dissuading factors. The silver lining for the wine category, as documented in Wine Intelligence's tracking data, is that the usage trend appears to be moving in a positive direction. The Wine Intelligence Alternative Wine Opportunity Index, a compound measure of consumer engagement in wine categories including sustainable, organic, natural, biodynamic and Fair Trade, is showing gains across the board.

Within this group, the standout performer over the past two years has been natural wine. This sector has benefited from widespread advocacy over the past few years from within the wine trade, particularly the influential sommelier community, and can now be found on wine lists at many fashion-conscious bars and restaurants in major developed world cities.

What appears to set natural wine apart from many other "sustainable" wine products is that its fundamental attraction is more focused on the intrinsic (the process in which the wine is made makes its taste profile very distinctive). This contrasts with the much more long-established organic wine, which is also continuing to build an audience, but at a less spectacular rate of growth. Organic wines may claim to offer a better consumer taste experience, but broadly organic's selling point is more likely to be extrinsic (the perception of the category as an ethical or sustainable choice).

That said, the deliberate strategy of Systembolaget in Sweden to list a growing number of organic wines in its retail stores has led Sweden to become one of the largest and most successful organic wine markets in the world, providing a good example of a "social influence" effect. Natural wine also seems to be benefiting from the same effect, among a more involved segment of the wine drinking population in larger cities such as London and New York. May the sustainable wine market simply require more of these social influence nudges to become acceptable in the mainstream?

Alternative Wine Opportunity Index 2022 by Wine Type

Natural wine tops the Global Opportunity Index for alternative wines, with organic wine a close second

Global Alternative Wine Opportunity Index 2022

		Rank difference 2022 vs 2020
1	Natural wine	n/a
2	Organic wine	-1 ↓
3	Sustainably produced wine	-1 ↓
4	Environmentally friendly wine	=
5	Fairtrade wine	-2 ↓
6	Preservative free wine	1 ↑
7	Wine from a carbon-neutral winery	=
8	Sulphite free wine	-2 ↓
9	Pet Nat (Petillant Naturel)	n/a
10	Biodynamic wine	=
11	Orange / skin contact wine	=
12	Vegetarian wine	1 ↑
13	Vegan wine	-1 ↓

Top four wine types all show increase in Opportunity Index scores since 2020

Natural wine ranking for 2020 not available as the category was not included in the previous index. The Wine Intelligence view at the time was that there was some consumer confusion as to what 'natural' wine actually was. In the past two years, ongoing research suggests that category understanding has grown to a point where it should be treated the same as other alternative wines.

Base = All global wine drinkers from Australia, Argentina, Brazil, Canada, China, Germany, Hong Kong, Ireland, Japan, New Zealand, Portugal, South Korea, Singapore, Sweden, UK, US (n=17,837), weighted by adult regular/ imported wine drinking population
↑ / ↓: Statistically significantly higher / lower than Oct '20 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mar '19, Oct '21, (n≤ 17,837), Global regular wine drinkers; Wine Intelligence Opportunities for Alternative Wines Report 2022

sustainable wine cellars

THE WINE WORLD MAGAZINE'S TOPIC OF THE YEAR

Sustainability IN THE CELLAR

The topic for 2022 of our magazine will be Sustainable Wine Cellars, a specific focus, essential in order to look at the paths of sustainability in wine. In addition to the energy-related aspect, the wine cellar is the core aspect for every sustainability strategy, because it is the place where the production process with high environmental impact takes place, and where almost all good practices of sustainability are still to be written. This is also why it deserves special attention

By GIULIO SOMMA

The markets are asking for sustainable wines, but at what stage is the worldwide production? If we now look at the many projects and interventions operated in the world by wine companies towards a more sustainable production, with a low environmental impact and circular economy, we can well say that the sector is getting ready to answer adequately to this demand for "green" wines even if, as we have read in the previous pages, there is still a bit of confusion in the minds of consumers coming from different countries on what sustainable wine are. On the other hand, on the production frontline, it is now clear what sustainability is, based on the three pillars (environmental, economic and social) that need defined standards capable of "measuring" the gradual achievement done by the companies. Also because the danger of greenwashing is always around the corner and the mainstream media that discusses this issue, is likely to induce in the public opinion that natural reaction of weary indifference that the hammering of the media can cause. With the risk that a subject of work and commitment necessary to guarantee the survival of the planet will no longer have the right attention from the public opinion.

To avoid this risk, on our magazine we wanted to dedicate the topic of the year to how to look at the development of sustainability from a particular perspective: that of the wine cellar, the center and heart of wine production, which today represents the real challenging complex of every sustainability strategy of the wine company, because it is the place where the high environmental impact production processes are concentrated and where almost all good sustainability practices are still to be written. Actually, browsing through the pages of the media specialized in wine, of today and yesterday, there is a clear difference between the number of researches, articles and initiatives dedicated to sustainability in the vineyard with respect to the same issues covered in the oenological and end-of-line processes in the wine cellar.

And - it must be said - the pandemic experience and the energy crisis of the last year, now aggravated by the winds of war, was necessary in order to bring to the center of the attention the need to rethink the entire system of productive practices in the wine cellar considering energy saving and, more generally, a lower environmental impact. Although electricity is the main source of energy used in wineries (over 90%).

"Energy consumption has always been counterbalanced by interesting sales volume," Professor **Riccardo Guidetti,** professor of Agricultural Engineering at the University of Milan, recalled in one of his recent speeches. "Which is the reason that when only energy analysis studies were carried out, comparing it for example with the cost of the bottle, the economic savings deriving from the adoption of solutions to reduce consumption turned out to be very low."

Then the post-pandemic crisis arrived, today the consequences of the conflict in Eastern Europe, and the costs of energy has become central for the economic processes of the companies (especially in the Old Continent), imposing a decisive shift of the attention to this issue also in the perspective of the sustainability of the company on the whole (see the article on the side). But the centrality of the wine cellar in the sustainable paths of the winery does not depend only on energy because, when we focus on the world of the wine cellar, we must not reflect only on the production and processing of wines where, as explained by **Antonella Bosso** researcher at CREA (the Council for Research in Agriculture of the Italian Ministry of Agriculture) and important exponent of the research groups of the OIV "the results that can be obtained in terms of sustainability are more limited," although they remain significant; we must rather think of everything that happens around the winery in terms of inputs, energy supply and different products (from the enological to the so-called "dry goods") whose sustainable compatibility becomes part of the company's sustainability report, and also of the managing outputs, sub-products or rubbish, the disposal of which still represents an economic cost for the company and a significant item of the environmental footprint, at least until it will possible to transform them into a new "resource," by reviewing the production processes in a circular economy perspective. **Tobias Webb**, co-founder of the Sustainable Wine Roundtable recalls this, in his opening interview of the newspaper.

"In the wine cellar, the two major problems concern water resources and CO_2 emissions in all the different practices related to fermentation," Mr. Webb said. "Which some of the leading companies in the world of wine have learned to capture and reuse within the production cycle. An excellent idea, because most of the wine companies are large producers of CO_2, especially during fermentation."

But we should also go back, at the moment of the designing and building of our factory where a whole series of architectural-engineering, plant and outfitting choices will be important in designing our sustainability path. Not only for the choice of the construction materials but also, and above all, in the design of the spaces and places of the wine cellar that will have to comply with the logic of energy efficiency, but also of working quality where, it is always good to remember, sustainability is a triad: not only environmental but also social and economic. The world winery system is now facing this epochal challenge with a fair, proactive and attentive attitude that is rapidly leading the production system to respond more and more adequately to the expectations of markets and of consumers from all over the world. The road is still long but the challenge for a planet capable of hosting future generations of winemakers is too important not to be won. Whatever it takes.

WITH RICCARDO GUIDETTI (UNIVERSITY OF MILAN), A GUIDE

Riccardo Guidetti

Electricity Consumption. You Can Save Money

By ROSSELLA CONTATO

Energy saving strategies have now become a priority hub not only in order to face the difficult economic market contingency, but also in order to set up business development plans correctly and profitably. Such plans, it is now clear, must be thought of within sustainable logics, where a correct energy balance responds to two of the basic dimensions of sustainability- the environment and the economical aspect. This is due to the increase of the prices of electricity and the uncertainty on what will happen in the near future that have shifted the focus of the discussion on the reduction of energy consumption from a purely environmental plan to that of economical saving, which has now become an absolute priority in the wine sector, considering that 90% of the energy used by wineries is electricity.

And beside the medium-term investment plans, that relate to the diversification of energy supply sources, a lot can also be immediately done in terms of "energy saving" by tackling the problem of consumption and the practices to reduce it. We asked **Riccardo Guidetti**, Professor of Agricultural Engineering at the University of Milan, who has conducted specific research on some Italian wineries and whose conclusions can be adapted to all wineries in the world, to help us understand the technical and management aspects of electricity consumption in the enological production. According to his re-

search, approximately 0.7 kWh are needed for each liter produced and bottled (0.5 kWh / l for the bulk one), a number that, multiplied by the annual production of medium-large companies, reaches very important figures that today weigh heavily on the balance of companies. The most energy-intensive phase is fermentation, which absorbs by itself about half of the electricity needed in the wine cellar, however it is necessary to analyze the entire process to identify possible margins for improvement.

An Energy Analysis

"A process for saving electricity must be anticipated by an overall energy analysis, in order to identify the corresponding consumption phase by phase," said Mr. Guidetti, recommending that all utilities areincluded in the analysis, not only the processing plants, but also the lighting inside and outside the estate, heating or cooling in offices, functionality of computers, printers, laboratory instruments, etc.

The energy used by each machine can be measured using special instruments that detect the voltage and current intensity, or it can be calculated by multiplying the power by the time of use, taking into account the coefficients of real use of the machines (generally used at 70 -80% of the rated power). As we have seen from our interviews with some plant engineering companies, even 4.0 systems integrated into the plants can provide useful information. The energy data must then be inserted in a flow sheet that covers the entire process and allows to immediately identify the most energy-consuming points and the possibilities of intervention.

Management Aspects

Mr. Guidetti emphasized that, by adopting virtuous behaviors, it is possible to save up to 15% of energy. How? First of all, by keeping the machines in stand-by when they are not working (it seems simple but it's often not done), and then using them at full charge, so that the engines operate with maximum efficiency. It is then necessary to be equipped with machines sized according to needs. Preventive maintenance can also lead to energy saving, since plant malfunctions, as well as leaks or inadequate insulation of pipes, valves and fittings, lead to a waste of energy. Finally, wineries must pay particular attention to the management of the peak of power that takes place during the harvest. The possible solutions indicated by the teacher are two: to agree with the provider specific multi-hour rates and evaluate the hypothesis of renting an autonomous generator for the necessary period.

Investing In Advanced Plant Technology

The current energy crisis can give wineries the decisive impulse to buy new machines. The payback period of investments, considering the actual costs of energy, is most likely 4-5 years less than the previous period. Among the possible technological solutions, the expert places in first place high-efficiency electric engines.

"There are also specific plant solutions, small technical details that each manufacturer has introduced to improve the efficiency of their machine," Mr. Guidetti said. "Particular organs, kinematic chains, gears, automatic components, valves with a specific design, as well as certain membranes with optimization of permeability, which in specific filtration operations reduce pressure losses for the benefit of a lower energy consumption connected with the functioning of the pumps."

Many other plant and design interventions manage to reduce energy consumption, for example: installation of inverters to adapt the rotation speed of the motors to real needs, adequate designing of the network of compressed air systems to minimize pressure losses, heat recovery, use of alternative energies, switch to LED lighting in all the plant.

Solutions To Reduce The Impact Of Refrigeration

Half of the electricity used in the cellar is absorbed by refrigeration (important especially in the phases of fermentation and maturation), therefore it is necessary to improve the energy efficiency of refrigeration systems. According to the professor, it is also worth considering the opportunity of managing refrigeration with absorption systems, based on the use of heat to regenerate the refrigerant fluid, instead of the traditional compression systems, which require a lot of electricity. If the heat is generated from renewable sources (such as biomass from pruning waste) and/or recovered from the hot flows in the cellar, a further energy saving and a lower impact on the environment is obtained. For the management of the cold fluid Guidetti suggests the adoption of some technical solutions, such as wine vessels equipped with jackets instead of traditional heat exchangers, which require pumps to move the product.

Energy saving in the fermentation phases can also come from a microbiological approach: using active yeasts at higher temperatures requires less refrigeration. In a research, in which the teacher took part, a new strain of Saccharomyces cerevisiae (Lalvin ICV Okay of Lallemand) was used, and this allowed to perform the fermentation at 19 ° C, instead of the standard temperature of 15 ° C, saving 65% of the energy. A final consideration concerns the cooling of the cellar rooms, such as the barrel rooms: an adequate recirculation of the air can lead to an electricity saving of 30-40%. It is generally implemented by shutters that allow to mix part of the air coming from the outside with the inside air, with the further advantage of preventing the development of mold on the walls.

New Developments

Using renewable energy sources means not only savings in bills but also in a reduction of the environmental impact of production. Photovoltaic panels have been widespread in wineries for some time, and over the years they have become increasingly economical and efficient.

"In particular, today there is a strong interest in agro-photovoltaics," Mr. Guidetti said. "Panels mounted in the field, above the crops, that are able to move and follow the direction of the sun, while ensuring the lighting of the underlying plants."

Thermal energy can also be exploited from the sun, with collectors ("solar panels"), capable of covering part of the heating needs. Wind systems, on the other hand, make it possible to use the kinetic energy of the wind. Today there are small ones, even less than 20 kW of power ("micro-eolic"), with regard to an investment of 2-3,000 euros per kW. In wineries they have not yet become popular due to their limitations. They are only suitable for windy areas, the aesthetic is not very good and the cost is quite high. For companies located near watercourses, the installation of micro-hydroelectric plants can also be considered. Finally, the popularity of geothermal probes is increasing, pipes deeply inserted into the ground (where the temperature is constant), filled with a fluid that heats or cools depending on whether the temperature of the external environment is lower or higher. The probe is connected to a pump that allows the transport of the fluid and the exchange of heat between the environment and the ground. Energy saving is undeniable, but the initial cost of the system is still quite high and the planning requires highly specialized experts.

A NATIONAL CERTIFICATION SYSTEM FOR SUSTAINABILITY IN THE WINE SECTOR

Italy Among The First Countries To Have One Standard For Sustainable Wines

The breakthrough of the first wine producing country in the world can become a very important international benchmark. The system of only one national sustainability standard for wine will be improved this year and will become effective, with an identification sticker to be placed on the bottles, starting with the early months of 2023

The next harvest could be the first, for Italian wines, to have the sustainability certification communicated to consumers with a sticker placed on the bottles of wine. According to what was confirmed by the Italian Minister of Agriculture, Stefano Patuanelli, also during the presentation press conference of Vinitaly.

"We have recently launched the new 'Regulations for the national certification of the sustainability of the wine sector,'" he said. "Introducing a unique national standard for production of sustainable wines that places Italy, and Italian wine, as the European leader of sustainability in viticulture by starting an integration itinerary that will involve all the labeling systems with quality and sustainability certification already active in our country. This system will also establish the adoption of an identification sticker to be applied to the bottles in order to answer to the request of sustainability but also of information arriving from the consumer."

Italy, which, among other things, has recently launched an important constitutional reform that has seen the introduction of "Protection of the environment, biodiversity and ecosystems" among the development objectives of the country and, therefore, fundamental principles of its Constitution, stands at the forefront among European countries, and in any case among the first in the world, in defining one standard, supported and guaranteed by the State, available for all the wineries that intend to promote the sustainability practices in an easy way, practical and economical, in order to allow that also to the small and medium-sized companies are able to adopt them.

Even if we will have to wait until the spring of 2023 to see it effectively used for the first bottles, this is a real answer to the demands of a global market, as we read in the previous pages, responsive to green choices but struggling to give a precise and concrete identity to "sustainable" wines, overlapped in some cases with other categories (Organic, eco-friendly, natural, vegan, no sugar added). Consumers are confused on the focus of sustainability between environmental and health benefits, disoriented by the proliferation of brands and promises of sustainability which, often, not guaranteed by an adequate system of controls and certification, lead to greenwashing. For this reason, the unique standard introduced in Italy can represent an effective answer to this confusion of consumers by proposing itself as a very important international benchmark for the development of the future of the market of wine at a global level. As a matter of fact from this situation of confusion on the meaning, and the certification, of the sustainability of wine comes also the strong resistance of the international consumer to pay more for a wine that claims to be sustainable with the happy exception, again, of Italy where, according to results of a recent market research presented at Vinitaly, the approval rating for organic/ sustainable wines is growing, driven by Millennials (27-41 years) who conquer the first place among the products indicated with the greatest growth potential in the next years, with consumers willing to spend almost 10% more of the average prices in order to embrace the ethical choice. Therefore, will Italy be not only the first wine producing country in the world for quantity, but also the first country in the world for sustainable wine production? We will see, but today the premises are all there.

A Really Sustainable WINE COMPANY

BLB Vignobles is a good example of how even a small winery can be fully sustainable, from the vineyard to the cellar to the economic and social impact that it has on the community where it is nested

By **MAURIZIO TAGLIONI**

One of the objections often raised by small wineries regarding sustainability is that achieving it requires a considerable expense of resources, investments, and a management devoted to implement all the good practices required by the guidelines. However, some cases, such as the one we are going to examine in this article, demonstrate that large investments in the vineyard or in the wine cellar, in order to access a sustainability management system, are not necessary. What is necessary is a gradual transformation of the company from an organizational point of view, and therefore the adoption of an operational scheme that foresees a continuous commitment towards a series of parameters to which, in time, it should conform.

BLB Vignobles is a family-run winery whose name comes from the initials of the owner, **Bruno Le Breton**. It has been able to achieve important goals in terms of sustainability, despite its small size and the relatively small number of employees. The winery is located in the south of France, inside the most important "green" region of the country, Languedoc-Roussillon-Midi-Pyrénées. The wines of these lands have a unique character, growing between the mountains, the Mediterranean scrub woods and the sea, as well as the Cabernet and Merlot grapes that the Le Breton family grow to produce most of its wines, offered on the market as IGP Pays d'Oc.

"Our motto 'let's make wine all together for a better world' expresses the philosophy and the spirit of the relationships we want to develop with our employees and all stakeholders," said **Morgane Le Breton**, company marketing manager. "To safeguard the sustainability of our firm and contribute to a better world for future generations."

A consideration, that of young Morgane, Bruno's daughter, who reminds us all that behind a simple consumption of wine there are the winemakers, a territory and real social choices.

"Our voluntary approach to sustainability is based on our company values," she said. "Which relate to the commitment to reduce our environmental impact, responsibility towards our territory, and an ethical governance, based on respect for our employees and our customers."

Historically, BLB Vignobles was founded in 2008, when the previous owner retired and sold the winery to the then director, Bruno Le Breton, who called the new company with the initials of his name. The commitment in terms of sustainability was immediate and passionate: already in 2013 the two estates of the group, "La Jasse" and "Montlobre" obtained the HVE (High Environmental Value) certification in the Hérault department. Since 2014, spurred by a committed voluntary vision and strong values, the company has incorporated the challenges and virtuous circle of CSR (Corporate Social Responsibility) into its strategy. In June 2015, BLB Vignobles obtained the AFAQ 26000 (Assurance Française pour la Qualité) certification issued by AFNOR (Association Française de Normalization). It became, therefore, in France, the first family-run winery rated according to the ISO 26000 standard. In 2018, BLB Vignobles also obtained the Terra Vitis certification.

"As a result of collective efforts undertaken by the governance, by the employees and also by our partners, this prize highlights our coherent action for a family viticulture of high social value, strongly focused on sustainable development," Ms. Le Breton said. The effort is regular.

"BLB Vignobles gets together every year with its stakeholder committee," she said. "An essential meeting from the point of view of social responsibility, where every actor involved in the production of the wines of La Jasse, Montlobre and Vignes des Deux Soleils (last vineyard to be part of the group in order of time, ed) meets to create the responsible wine of tomorrow."

Let's now analyze from a closer point of view the actions taken by BLB Vignobles in the field of sustainability, moving on the three pillars: environmental, economic and social.

Environmental Pillar: Actions In The Vineyard

"Starting from the vineyard, the actions undertaken were initially aimed at limiting the consumption, both of water and of fuel for agricultural machinery," Ms. Le Breton said. "The existence of weather stations in the vineyards has allowed a better control of the needs of water of the vines, and a drip management of the irrigation has ensured a significant saving of water. At the same time, punctual inspections in the vineyard to identify any pathogens have ensured that the treatments in the vineyard were reduced to the real need, allowing us to cut fuel consumption by 30% compared with the past, at the same climatic conditions."

To these measures, to ensure a better water balance, we must add the grassing of the vineyards and the adoption of a protocol for the enrichment of the soil with organic fertilizer.

"The measures adopted have also allowed us to limit the impact of our activity on the flora and fauna biodiversity of our area," she said.

Wine Cellar Renovations

"In the wine cellar, we first focused on the saving and the efficiency of energy," Ms. Le Breton said. "We then searched, identified and adopted different innovations based on reducing consumption and started to produce energy from renewable sources. The temperature set point of the wine cellar has been changed, bringing it from the previous 16 ° C to the current 19 ° C, the insulation of the building has been improved and, again to encourage the control of temperature, we have also started to use the cool air of the night, enhancing it through targeted ventilation."

Furthermore, thanks to the installation of a photovoltaic system of about 1000m², BLB Vignobles is able to cover about 88% of its energy needs. The rest of the energy is purchased from a local electricity cooperative, committed to an eco-responsible approach.

"Just as in the vineyard, also in the wine cellar there is a particular attention to the containment of water consumption," she said. "Thanks to the usage from the beginning of a purifier, that allows us to recover and reuse it in multiple operations, considerably improving our water balance. Then, we took care of the renovation of the cellar equipment, benefiting from recent technologies and lower energy consumption machinery. We have minimized mechanical maneuvers, such as the pumping over and other manipulations of the wine, maximizing the use of gravity wherever it was possible."

The reduction in energy and water consumption was a significant step forward for BLB Vignobles, but the path towards sustainability has not been interrupted. "Our work has also continued in the more exquisitely enological field," she said. "BLB has in fact become part, as a pilot company, of programs to improve process control solutions, which concern microbiological techniques, sulphite-free winemaking, and the response to new consumer expectations, including those concerning the demand of less alcoholic wine. The adoption of just-in-time has completed the framework for the renewal of our production philosophy."

BLB Vignobles has also started an eco-design approach within a supply chain action aimed at reducing packaging led by Adelphe (a non-profit company for the recycling of packaging of French companies, ed.).

"We minimize the environmental impact of the packaging of our products through a reduced weight of bottles and cartons," she said. "Recycling of glass, cork and cardboard; the use of recycled paper for labels, bleached with gypsum pigments; and by supplying us from eco-certified partners. Furthermore, we recover and treat all the effluents, and we collect the waste that we are unable to recycle internally, in sorting bins and screening barrels, directing them to the recycle process and towards appropriate channels."

Bruno Le Breton

Morgane Le Breton

Economic And Social Pillars

"Preserving our 'terroir' by seeking the best for our partners and customers and offering to the market a healthy and good quality wine is for us a constant challenge," Ms. Le Breton said. "BLB is committed, actually, to respect and protect its employees, customers, neighbors, and its environmental and viticultural heritage. This commitment is reflected in the dialogue with the staff, listening to customers and responsible management of natural resources. The respect for our human capital is of vital importance. Since the moment of integration, new employees, seasonal or temporary, are greeted warmly and with a welcome booklet. Workers have access to training programs of their choice, which may or may not be related to their job. Hours in the company are flexible and can be part-time for employees who request it.

Remote working is possible and established at least once a week. 100% of employees receive a bonus and the profit sharing agreement is supplemented by a thirteenth monthly salary. Finally, the gap between the lowest and highest wage is contained in the ratio of 1: 5."

In terms of support of the territory, an evidence of the mentioned commitments are the sponsorships and donations of BLB for social actions, local sports and cultural associations, the reception of school groups (from kindergarten to university), the preparation of botanical paths inside the firm and, more generally, the development of a wine tourist offer in order to make the natural heritage accessible to those who love wine or who, more simply, want to enjoy a moment of return to the nature and an "immersion" in the vineyards.

"We also contribute to a sort of 'territorial circular economy' by enhancing some of our waste in contexts different from the wine sector," she said. "Such is the case of exhausted barriques, which are donated to associations and/or local artisans who give them a second life, in the form of wooden furnishings and objects, that have the most different functions. Local associations can therefore self-finance their initiatives, artisans can participate in the rehabilitation of our equipment that is no longer suitable for quality production, and we reduce our waste by operating at zero kilometers and contributing to the local economy. This also is sustainability."

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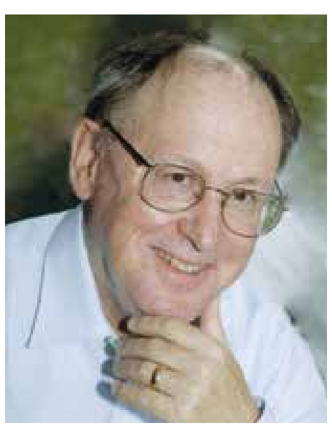
A NEW AGE OF COMPETITION IN THE BIDEN-HARRIS ADMINISTRATION AND ITS IMPLICATIONS FOR THE WINE SECTOR

The President of the National Association of Beverage Importers is discussing one of the topics that are likely to have a major influence on wine in the United States, the largest market in the world

By **ROBERT M. TOBIASSEN**
President of Nabi

What Is The New AMERICAN WINE DREAM?



Robert M. Tobiassen

Measuring, evaluating, and predicting competition policy in the United States' domestic market and the global wine world is a monumental task. We took a go at it. But first, open a bottle of your fine wine and pour a glass or two (but no more than two so you are a responsible drinker) as you read this article.

President Biden is leading a public dialogue on "What is competition in the United States and what should it be?", Executive Order 14036 (July 9, 2021 - EO), on "Promoting Competition in the American Economy" and his bipartisan infrastructure bill have the potential for making the most significant long term and fundamental shift in the U.S. economy for decades to come. If the EO and infrastructure law are properly carried out, then the "American Dream" will be indelibly changed. If not, then "it's a pipedream". Some may call it a "nightmare."

The President's Views

During the past 40-years, the economy of the United States has changed. Globalization of companies caused some of the change, but a new business philosophy grew in the U.S. that put shareholders and owners maximum profits as the paramount goal of businesses. Income inequality, the shrinking middle class, large companies acquiring smaller ones that increased market concentration and prevented new meaningful competitors, less bargaining power of employees, and less government oversight of the business community. President Biden grew up in the traditional "American dream" era and saw its benefits for all citizens, especially workers, to have better lives. He also saw how the reality of that dream was lost and decayed in the past 40-years and set a fundamental goal of the Biden-Harris Administration to restore that "American Dream" he grew up in and reaped its benefits. President Biden tasked many agencies to look at the reasons for why huge portions of specific goods, services, and agriculture ended up in the hands of a few huge companies. For the wine, beer, and spirits industries, the President tasked the Treasury Department and the Alcohol and Tobacco Tax and Trade Bureau (TTB) to examine several questions. Why did the Government allow so many mergers and acquisitions? Did the Government fail to enforce antitrust laws and unfair trade laws that resulted in small businesses not being able to compete? Are small and medium sized businesses really able to compete in the current economy?

One of the most significant initiatives of the Biden-Harris Administration is the goal of redefining the fundamental or organic aims and framework of the United States economy through a time consuming and methodical step-by-step project. First, the foundation was laid out in the Executive Order in July 2021, that directed 72 actions, such as reports and reviews, by Federal agencies, many within 120 days. Many agencies published requests in the Federal Register for comments by all interested groups or individuals in order to compile the reports and reviews.

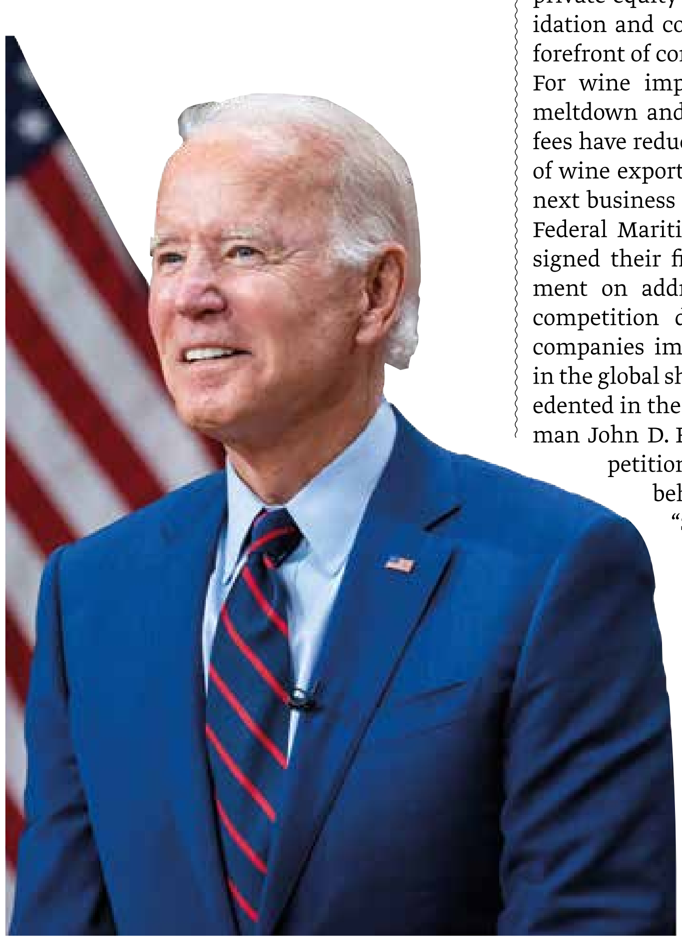
Two of those action items covered the Treasury Department and the Alcohol and Tobacco Tax and Trade Bureau (TTB) and I will focus only on those in this article. On February 9, 2022, the Treasury Department released its report titled "Competition in the Markets for Beer, Wine, and Spirits". TTB now has about 60 days to consider how it should respond to the competition questions in the report insofar as unfair trade practices enforcement is done and whether current TTB procedures adversely impact new entrants and small and medium sized wine, beer, and spirits companies in the United States marketplace thereby hindering competition. At the same time, the White House Competition Council is presumably working with the Federal Trade Commission and the Justice Department's Antitrust Division on the topics identified in the report that are beyond the authority or "competence" of TTB and the Treasury Department. We are standing at a pivotal point where constructive, thoughtful, and empathetic discussions are vital. These are really big tasks.

A policy review is influenced by the officials leading it.

The Chair of the Federal Trade Commission (FTC), Lina Khan, was a faculty colleague of Prof. Timothy Wu at Columbia Law School and they know each other. Mr. Wu is the project leader at the White House handling the drafting and execution of the EO. The FTC and the Antitrust Division of the Department of Justice are the primary Federal authorities tasked with enforcing the antitrust laws. The Assistant Attorney General, Antitrust Division Jonathan Kanter, is a progressive and forms the trifecta of competition policy reformers with Ms. Khan and Mr. Wu. President Biden appointed these officials.

Wine Sector And Importers

Cyril Penn, editor of the widely read e-newsletter, Wine Business Daily (Sonoma, California), interviewed a winery and vineyard expert on mergers and acquisitions (M&As) in the future of the U.S. wine industry, seven days after the EO was signed. While the EO topic itself did not come up in the interview, the interview highlights the uncertainties of whether U.S. wineries might go public or more being acquired by private equity firms, financial difficulties of vineyards due to the wildfires, and the lack of diverse sources of income; oddly, it implies that some small wineries will look for consolidation with other businesses that might provide security from financial diversity.



U.S. President Joe Biden

Many foreign wine producers and vineyard owners face similar challenges, especially in the time of Covid. Closures of on-premise/trade and off-premise/trade retailers cut sales volume and sales revenue on both sides of the Atlantic Ocean. Harsh weather in Europe with hail storms, early freezing temperatures, and rain storms reduced production and increased costs of wineries in Europe and in the U.S.

These financial downturns made certain wineries, importers, and distributors more vulnerable to take-overs, mergers and acquisitions, and private equity buyouts. The EO puts the consolidation and concentration of businesses in the forefront of competition policy.

For wine importers, the global supply chain meltdown and exorbitant increase in shipping fees have reduced the volume and timely arrival of wine exports to ports of entry in the U.S. The next business day following the EO signing, the Federal Maritime Commission (FMC) and DOJ signed their first ever memorandum of agreement on addressing economic oversight and competition deficiencies of foreign shipping companies impacting U.S. trade. Consolidation in the global shipping industry has been unprecedented in the past decades. American businessman John D. Rockefeller (1839-1937) said "Competition is a sin." "Sin" is in the eye of the beholder. Rockefeller established the "Standard Oil Trust" that monopolized oil wells in the United States. Competition by independent oil companies would result in the drilling of more overall oil wells that would cause lower consumer prices. But by his own company owning all of the oil wells, he could control prices and profits completely. So, money spent competing with other companies was always a net loss and created a waste of his own resources because of the resulting lower prices and, therefore, profits.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"…THE TRIFECTA OF COMPETITION POLICY REFORMERS…"

Left, Lina Khan, President of the Federal Trade Commission (FTC). Center, Prof. Timothy Wu from Columbia Law School and White House project leader for the EO. Right, Jonathan Kanter, Assistant Attorney General at the Antitrust Division

Implementation and execution of the EO is important to importers and directly impacts the wine import sector because consolidation in the U.S. of producers, distributors, and retailers create greater barriers and hurdles for you to overcome in getting your imported products into the U.S. marketplace. Trade practice regulations govern the promotional and sales activities used to get imported wines to the retailer and ultimately the consumer. During the past five years, active and rigorous unfair trade practice enforcement investigations by TTB have targeted smaller industry members than larger ones. The report questions this use of resources because small companies do not have market concentration that poses antitrust concerns. Moreover, small and medium sized companies increase competition provided the laws and regulations strongly maintain a level playing field in the marketplace. Many importers are small and medium sized companies.

Wine Consumers And Retailers

Consumers purchase from grocery stores, both independent stores and nationwide chain stores, are the primary retailers of wine to the bulk of consumers. The National Grocers Association (NGA), which in March 2021, issued a white paper calling on Congress and the federal government to modernize antitrust laws to restore competition to the grocery sector, issued a statement the afternoon of July 9 expressing its appreciation for order addressing the nation's competition policy, specifically its focus on the food sector.

"A diverse, competitive food retail marketplace benefits not only independent community grocers, but consumers, wholesalers, manufacturers, suppliers and farmers," NGA President Greg Ferrara said. "The order marks the first time in more than 20 years the executive branch has taken action to prohibit conduct that violates the Robinson-Patman Act, a law that was stood up to protect consumers as well as food entrepreneurs from dominant grocery chains who take advantage of their size to amass greater power and limit customer options. We look forward to working with the FTC as it reviews these violations and takes action to end these power buyers' anti competitive tactics."

Some large European wine (and spirits and beer) producers own import companies in the U.S.. These global companies face antitrust regulators both in the U.S. and in the European Union. Like the Biden-Harris Administration, the European Commission has commenced an aggressive antitrust enforcement program. In the U.S., when TTB investigates an alleged violation of an unfair trade practice, the State alcohol control agency usually opens its own investigation with sharing of information, and the reverse is true where the State opens the first investigation. On the global level, while direct coordination by the U.S. Government and the European Commission is unlikely, the more likely scenario arises when an antitrust investigation of a global company becomes public in the news press. The old adage applies: "Where there is smoke, there is fire."

What Is Next?

This effort by the White House, my friends, is serious business. This project is strongly driven internally by the Biden-Harris Administration. It stood out to me when reading, that the Treasury Department Report does not contain any specific discussion of the importer tier of the industry. In fact, the words "imported" or importing" only appear twice in the 64-page report. I believe this happened because many large distributors (or wholesalers) also own import operations so many of the remarks about distributors and competition indirectly apply to large import operations.

One unanswered question is how far will the tentacles of the EO policy extend? Joint ventures are popular among companies in the alcohol industry. Recently, Beam Suntory and Boston Beer announced a joint venture for the marketing of Truly as a spirits product along with Beam Suntory RTD brands. While outside the U.S., Moet-Hennessy and Campari announced an e-commerce/DTC partnership. EU merger review is ahead and will that review, in any respect, take a different approach similar to the economic philosophy of the EO?

Early Industry Criticism May Prevent Public Dialogue

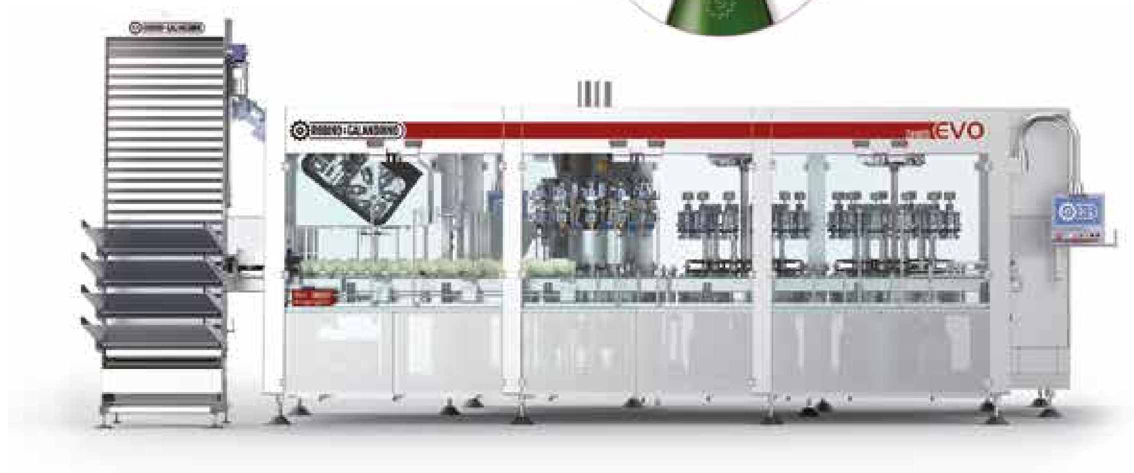
The Treasury Department report was released early in the morning of February 9, and before the day was over, press releases and media interviews spread like a wildfire in California or the Pacific Northwest harshly criticizing parts of the report and selectively citing text (what we call "cherry picking") that supported a company's business model. Hard or Red Lines were being drawn in the sands of political Washington, DC. For some, this effort is viewed as a "nightmare" while others agree it is the foundation for the "new American Dream". However, after reading the report closely, it reaches no solid conclusions about any and all of the competition and unfair trade practices discussed in the report. It is a comprehensive statement of the longstanding concerns and debates within the beverage alcohol industry at both the State and Federal Governments on competition policy. Nothing was new in the report that has not been discussed publicly or in the shadows in the past. It is a balanced report that is aimed at fostering a public, industry, and government dialogue.

Before condemning the report, everyone should read it closely. Politics should not make this a "pipe dream". The outcome here will directly affect the ability of small wineries to enter the U.S. market through large or small importers and distributors. We are standing at a pivotal point where constructive, thoughtful, and empathetic discussions are vital. As President Abraham Lincoln said, "The better angels of our nature" must prevail.

Now enjoy that glass or two of wine. When the world of travel opens up and health policies are showing good results, I hope to visit with some of you to share that wine and have a thoughtful conversation to hear your views, opinions, and worries. Until we meet then, enjoy your favorite wines…responsibly.

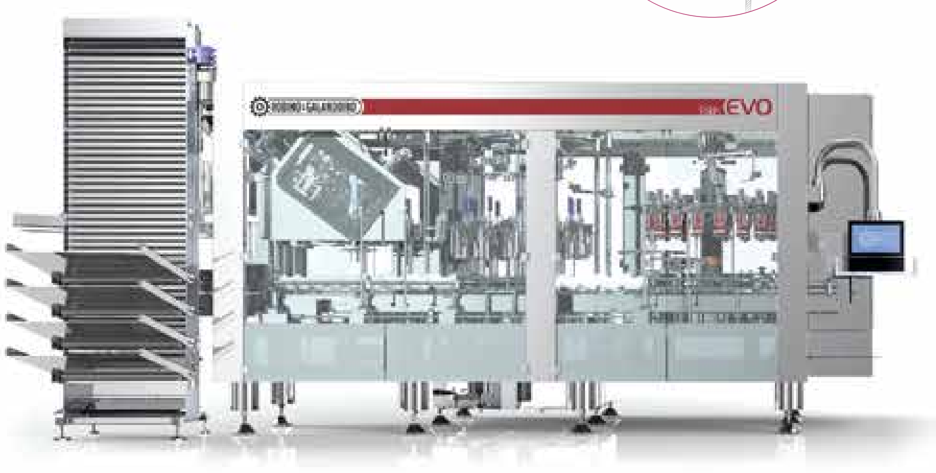
ROBINO & GALANDRINO

Zenith EVO



Feeding, dispensing and application of sparkling wines capsules with double centring system: orientation of the bottle (embossed logo on glass, screen print, sleeve and glass mould seaming) and capsule, both with cameras managed by SNIPER vision system.

Poker EVO



Feeding, dispensing and application of tin and polylaminate capsules (spinning heads) and PVC/PET ones (thermo-shrinking heads).

Record EVO PLUS

Feeding, dispensing and application of wirehoods.

Wirehooder featuring bottle orientation (embossed logo on glass or glass mould seaming) prior the application of wirehoods achieving the desired position of the opening eyelet (via SNIPER vision system).

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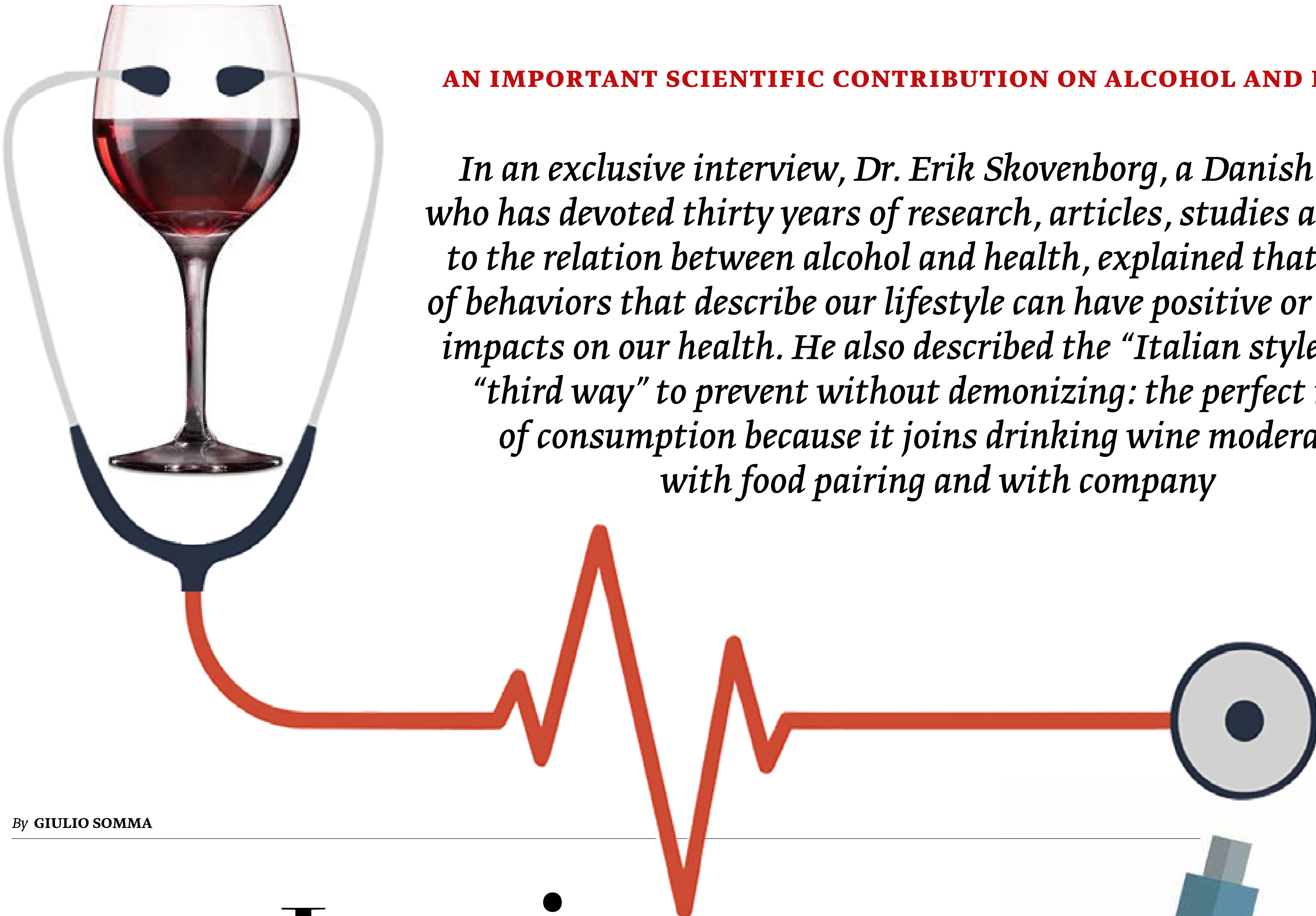
R&G

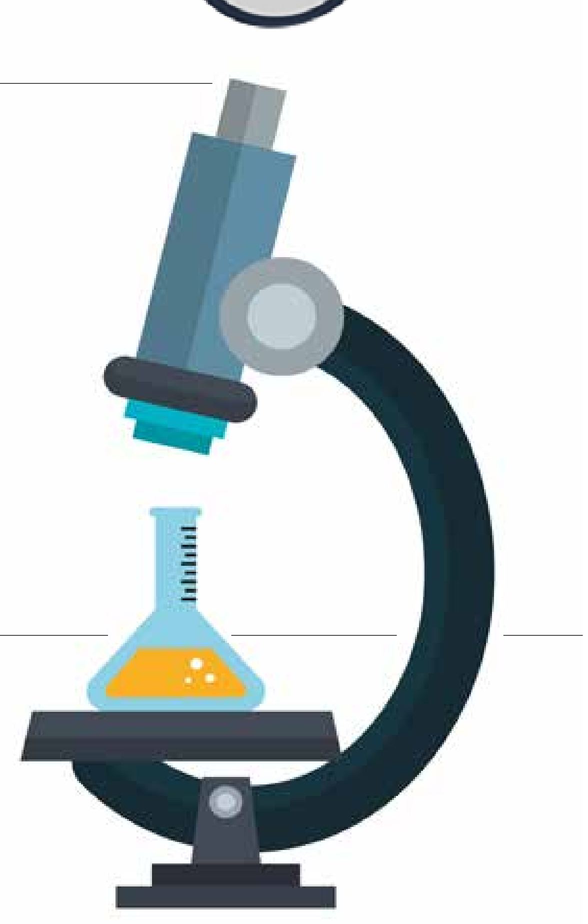


AN IMPORTANT SCIENTIFIC CONTRIBUTION ON ALCOHOL AND HEALTH

In an exclusive interview, Dr. Erik Skovenborg, a Danish doctor who has devoted thirty years of research, articles, studies and books to the relation between alcohol and health, explained that dozens of behaviors that describe our lifestyle can have positive or negative impacts on our health. He also described the "Italian style" as the "third way" to prevent without demonizing: the perfect model of consumption because it joins drinking wine moderately with food pairing and with company

By **GIULIO SOMMA**

Is wine HEALTHY?



The relationship between wine and health has always been difficult, in the eternal search for a point of balance. The debate on the conclusions of the BECA Commission, created to build the European strategy to fight cancer, ended up putting alcohol on a "black list," without any distinction between ranges and methods of consumption. It showed the contradictions and limits of politics, but also the partiality of scientific literature that does not have a shared and ultimate position.
To have a full picture, it is therefore important to multiply the voices and points of view, including for example that of Erik Skovenborg, who has been investigating the relationship between wine and health for more than thirty years. His is an important contribution, because it can encompass various aspects, including the consumption of alcohol (and therefore wine) in a much broader context. The idea is to give wine back to the role it deserves and to conceive the Italian style as a real "model of consumption." Dr. Skovenborg said that it "is everywhere imbued with a positive vision of moderate consumption of wine, connected to the table, to eating in company with family and friends."

The European Parliament, in the debate on the final document of the BECA Commission, has corrected an approach that, in Europe and in the world, is gaining more and more space: alcohol is bad for you, regardless of anything else. But can we accept this sentence - "alcohol is bad" - without making a distinction? And if not, why?
I am not very familiar with the details that animated the debate in the European Parliament, but in any case, from what I could understand, a first step was taken to change the basic concept that "all alcohol consumption is bad" to "heavy consumption of alcohol is bad."
But let's see what the studies say that epidemiology of cancer is, to a large extent, the determination of small effects and weak associations, and that creates great challenges. The study by Bergmann and others, published by the International Journal of Epidemiology in 2013[1], based on EPIC data – European Prospective Investigation into Cancer and Nutrition, on 268,442 European women, shows that mild or moderate alcohol intake does not show a direct correlation with the incidence of tumors. If we take, as a reference group, women who consume alcohol in a mild way, less than one drink a day, for all their life, in contrast with the group of non-drinkers (who consume alcohol at such a low level and so rarely that presumably it could not have any influence on the risk of getting sick, ed.), the result is that among women who consume one drink a day throughout their life, the risk of mortality connected to all causes is lower, with an HR ("Hazard Ratio," which we can translate as the risk ratio in the survival analysis, in other words the relation between the instantaneous risk rate of an event in two conditions that we want to compare, ed.) of 0.92 (0.86-0.98).
In this context, we often face problems concerning the information of alcohol consumption patterns. It is almost absent, for example, in the report of experts of the CUP (Continuous Update Project) of 2018 "Alcoholic drinks and risk of cancer." Most studies ask questions about alcohol intake in a week, then divide the weekly intake by seven in order to calculate the daily intake, but most studies do not have a real model of reference of alcohol consumption. However, when we have a precise model of reference, the results reveal a strong increase in risk associated with the famous binge drinking. For example, after analysing cumulative alcohol intake, binge drinking was associated with an increased risk of breast cancer among Danish nurses (Mørch and others, published in the "European Journal of Public Health" in 2007[2]), among U.S. nurses (Chen and others, published in the "Journal of the American Medical Association" in 2011[3]), among Puerto Rican women with a sister suffering from breast cancer (White and others, published by the American Journal of Epidemiology in 2017[4]), and among Spanish graduates (Sánchez-Bayona and others, within the Nutrients Project of 2020[5]).
At the same time, the study on Danish nurses did not find an increased risk of breast cancer with moderate and regular alcohol intake. With the information we have, which comes, however, from imperfect studies, we can still say that excessive alcohol consumption and binge drinking are significantly associated with an increased risk of cancer. On the other hand, regular and moderate alcohol intake, preferably during meals, is associated with lower all-cause mortality.

Dr. Erik Skovenborg

When it comes to fighting cancer, the disease of the century, it is right to use all the "weapons" we have. But isn't there a risk of demonizing entire categories of goods, losing track of the importance of lifestyle in its complexity? And how do different lifestyles correspond to different levels of risk?

Lifestyle is very important, and actually several studies show that a moderate consumption of alcohol, if associated with the good habit of doing exercise, does not lead to an increase of the risk of cancer.

A good example of the importance of physical activity as part of a healthy lifestyle, relating exercise and cancer-related mortality risk, is offered by the analysis of data from participants aged 30 and over at the "Health Surveys for England and Scottish Health Surveys," at the center of the study by Feng Y and others on 54,686 British adults, published by the International Journal of Cancer in 2020[6]. Among those who do little physical activity, a MET (Metabolic Equivalent of Task, the unit of measurement that estimates the amount of energy used by our body during an activity, compared to when we are resting) of less than 7.5 hours per week, has led to a significant association between alcohol consumption and the risk of cancer-related mortality. Among former drinkers the HR (Hazard Ratio) is 1.53 (1.11-2.12), among those who drink at levels that we can define as risky the HR is 1.47 (1.07-2, 02), and among drinkers at dangerous levels the HR is 1.64 (1.07-2.52), and all had significantly higher mortality risks than non-drinkers. The increased risk, however, is eliminated among individuals who do exercise at a MET level bigger than 7.5 hours per week.

But we can also give another example, looking at a healthy diet as an example of a healthy lifestyle. In the study by Engeset and others, published in the European Journal of Cancer Prevention in 2009[7], a significantly higher risk of breast cancer was found in women with high alcohol consumption and low fruit, vegetable and fish consumption compared to those who, on the other hand, consume a lot of fruit, vegetables and fish.

In this sense, considering the "role" wine plays in the Mediterranean Diet and in everyday life, can it be considered "dangerous"?

The Mediterranean Diet, which includes a moderate consumption of red wine, is associated in many studies with a lower mortality in relation to all causes, from a lower risk of death from cardiovascular disease to a lower risk of getting cancer. A systematic review and meta-analysis of data from multiple studies found a very close link between the Mediterranean Diet and a lower risk of cancer-related mortality among all the population, and a lower risk considering all causes of death among people who survived cancer. The association between Mediterranean diet and cancer is evident only in the inverted association (and therefore a lower risk) between cancer risk and consumption of fruit, vegetables, whole grains and moderate consumption of red wine. (Morze and others, published by the European Journal of Nutrition in 2020[8]).

What should the European and international wine supply chain try to do in order to change the point of view of the WHO, which in the next months could reiterate exactly the same message and the same principles (partial and prohibitionist) expressed by the BECA Commission of the European Union?

The best thing to do, but not only for the wine supply chain, could be to organize seminars and round tables that bring together scientists who represent both positions on the topic represented by the link between wine and health.

Is it possible to think of a "third way," which is able to implement prevention policies, without demonizing a basic product of the European diet and culture such as wine?

A good example comes from the Italian cultural heritage, which is permeated with a positive vision of a moderate consumption of wine, connected to the table, to eating with family and friends, and which is counterbalanced by a decidedly negative vision of binge drinking and drunkenness more in general. This cultural tradition of drinking wine with the family, and the emphasis placed on wine as a cultural product, is even stronger and more represented in the wine production areas, as emerges from the study by Beccaria F. and Rolando S., published in 2016 on "Drugs: Education, Prevention and Policy."[9] In this period, I am working on a study on the consumption patterns of an Italian community in Pennsylvania.

The Italian example, when it comes to anti-alcohol policies, is certainly not new, the scientific field has been talking about it at least since the end of the 1980s. One of the most important studies was published in 1992, "The cultures of alcohol - Sociology of daily drinking between theory and intervention," edited by Amedeo Cottino and Andrea Rolli, who started from alcohol control policies and investigated the different patterns of consumption. A work that has inspired, among others, an article by A. M. Cooper from 1993[10], that describes the happy relationship between Italians and drinking. Emphasizing, for example, that "Research from the late 1950s showed that Italians very rarely got drunk, and that even then Italy was virtually free from the psychological, social, economic and legal troubles associated with drinking that existed in the USA and other countries."

Another important aspect underlined by A. M. Cooper is "The trend inversion in consumption, which began to decline as early as the 1970s." In general, then, "most adults love to drink but don't overdo it." The strength of Italy, then as now, is in the socio-cultural model in which the consumption of alcohol is placed, "Which

ERIK SKOVENBORG

Erik Skovenborg is a Danish doctor, specialized in family medicine, who has developed a deep interest in the health implications of drinking. His research led him to become a member of the Social, Scientific and Medical Council of AIM - Alcohol in Moderation, in 1992 and then a member founder of SMAB - Scandinavian Medical Alcohol Board, in 1994.

Many scientific articles on wine and health have been published in "Circulation" (2001), "British Medical Journal" (2006) and "Drugs and Alcohol Today" (2020). Erik Skovenborg also became president of the "Health & Alcohol Symposium" in Copenhagen, in 1996. He was also a member of the organizing committee of the "Women and Alcohol Symposium" in Stockholm in 1998 and of the international symposium "Alcohol in moderation - Health and Culture in the next millennium "in Oslo in 2000. And again, he is a member of the Board of Directors of ERAB - The European Foundation for Alcohol Research, since 2004, and of the Isfar - International Scientific Forum on Alcohol Research, since 2010.

For many years, Erik Skovenborg has given lectures on alcohol and health to professionals, doctors and the general public, and has written columns on wine and health in the Danish publication "Vinbladet," in the Norwegian "Vinforum," in the Chinese dedicated press and in the English papers specializing in fine wines, as well as having held a weekly column of wine criticism for the Danish newspaper "Søndagsavisen" between 2005 and 2018.

Among his published works, "In Vino Sanitas, 1990"; "Lead in Wine throughout the Ages", 1994; "Wine and health - Myths and Facts", 2000; "Women and wine - from useful facts to healthy enjoyment", 2014; "Til øllet - a book on beer and health", 2016; and "A toast to old age - a happy life as senior with beer and wine", 2017.

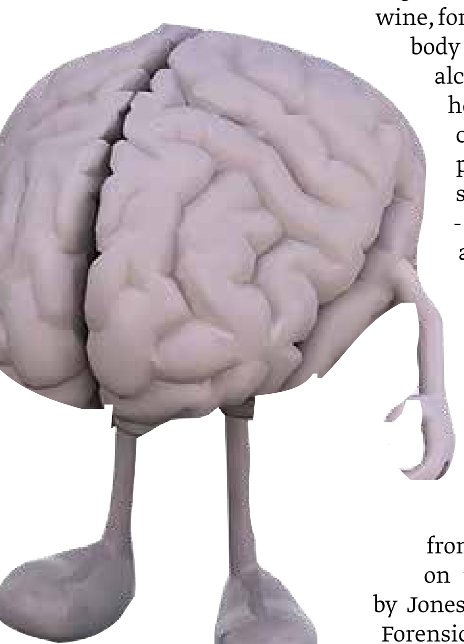
THE STUDIES:

1. "The association of pattern of lifetime alcohol use and cause of death in the European Prospective Investigation into Cancer and Nutrition (EPIC)", di Bergmann e altri, Int J Epidemiol 2013;42:1772-90.
2. "Alcohol drinking, consumption patterns and breast cancer among Danish nurses: a cohort study",
3. "Moderate Alcohol Consumption During Adult Life, Drinking Patterns, and Breast Cancer Risk"
4. "Lifetime Alcohol Intake, Binge Drinking Behaviors, and Breast Cancer Risk"
5. "Binge Drinking and Risk of Breast Cancer: Results from the SUN - Seguimiento Universidad de Navarra"
6. "Does adequate physical activity attenuate the associations of alcohol and alcohol-related cancer mortality?"
7. "Dietary patterns and risk of cancer of various sites in the Norwegian European Prospective. Investigation into Cancer and Nutrition: the Norwegian Women and Cancer study"
8. "An updated systematic review and meta-analysis on adherence to Mediterranean diet and risk of cancer"
9. "The more you know, the better you drink: The new drinking culture in Italian wine production areas"
10. "Italian drinking patterns; Model for theories and policies"
11. "Dietary and lifestyle habits of drinkers with preference for alcoholic beverage: does it really matter for public health?"
12. "Alcohol consumption and acute myocardial infarction: A benefit of alcohol consumed with meals"
13. "Alcohol drinking patterns and risk of functional limitations in two cohorts of older adults"
14. "Alcohol drinking outside meals and cancers of the upper aerodigestive tract"
15. "Drinking pattern and mortality: The Italian risk factor and life expectancy pooling project"
16. "Disappearance rate of ethanol from blood in human subjects: Implications in forensic toxicology"

emphasizes the educational aspect, but in mere scholastic terms, as well as in a broader sense. For example: the family introduces the children to wine very early; alcoholic beverages (wine, ed.) are treated as something that is part of normal everyday life, rather than as something mysterious; drinking only during meals (another typically Italian tradition) instead of at other times of the day; the approach is more to the quality of what you drink rather than the psychoactive effects of the abuse."
After all, the socio-cultural model of Italian alcohol consumption is the one that places it in a context of "Normality, among the aspects to be enjoyed every day, and not as a mysterious or dangerous activity relegated to peculiar contexts and out of routine and familiar life. Drinking was like eating."

What do your studies on responsible wine consumption say?
The optimal way to drink wine is a regular consumption during meals, and actually a review of the specific contexts in which alcoholic beverages are consumed, published by "The International Journal of Addiction" in 1979, observes that wine is often associated with meals, at home and with relatives. Furthermore, according to the data of the study by Kosti RI and others, those who consume alcohol in a mild or moderate way usually observe a healthier lifestyle, and this is even more evident if the reference drink is wine[11].
Another study, conducted by Augustin LSA and others, on the link between alcohol consumption and heart attack, published in Epidemiology in 2004[12], found that the consumption of alcohol during meals is inversely related to the risk of acute myocardial infarction.
The work of Léon-Muñoz LM and others, published in Clinical Nutrition in 2017[13], examined the adult population of Spain who followed a Mediterranean model of consumption, mainly drinking wine and at table, noting a risk of functional limitations (defined as the "Restriction or lack of ability to perform an action or activity in the manner or a time frame considered normal, due to a disability") below the average.
Another study, this time Italian, conducted by Dal Maso L and others, and published in 2002 by the International Journal of Cancer[14], shows that, at any level of intake, subjects who drink between meals showed a higher risk of developing upper digestive tract cancer compared to subjects who drink only during meals. Also from Italy comes the work edited by Trevisan M and others, and published in the Annals of Epidemiology in 2001[15], which shows, with data from coming from all over the country, how those who drink wine between meals have higher mortality rates connected to causes such as non-cardiovascular diseases and cancer, than those who drink alcohol at the table.

Why is it so important to match food with what you drink, and is it true that, on average, we still drink too much?



Drinking during meals, and therefore pairing wine, for example, with food, prevents your body from having a high BAC (Blood alcohol concentration, or blood alcohol level), caused by what is being called "first step of metabolism" (a phenomenon of the metabolism of some drugs - in this case of alcohol - which occurs when the bioavailability of the drug is reduced consistently before it reaches and goes throughout the body).
Regarding the topic of the average consumption of alcohol in the world population, it is difficult to make a judgment on "drinking too much" for an entire population, because the tolerance to alcohol intake differs from one person to another. A study on the pharmacokinetics of alcohol, by Jones AW, published in the Journal of Forensic Sciences in 1993[16], found a peak in the alcoholic rate of 67 mg/dl following the consumption of alcohol with food, compared to the 104 mg/dl marked after drinking the same amount of alcohol, but on an empty stomach. The time to metabolize the same dose of alcohol was approximately two hours shorter when the subjects of the survey had breakfast before drinking, while on the other hand when a meal was consumed five hours after consuming alcohol, the average rate of alcohol disappearance from blood increased by 36-50%.

Returning to another topic often covered by you: is red wine really healthier than white?
Basically, it is a distinction that clashes with the same limits that we have so far analyzed. The effects on our metabolism of white wine and red wine are however connected to a series of other personal choices that each of us makes over the course of a lifetime, and which contribute to identifying our lifestyle. There has been, in recent years, a widespread noise about resveratrol, and this is where some confusion has been generated. The fact is that the many beneficial effects of this particular substance have been found in test-tube and laboratory studies, or in studies on animals, so the benefits of the resveratrol contained in red wine are all to be demonstrated.

A NEW BOARD FOR THE EUROPEAN WINE INDUSTRY ASSOCIATION, AND A SPANISH PRESIDENT. BUT PRIORITIES REMAIN THE SAME

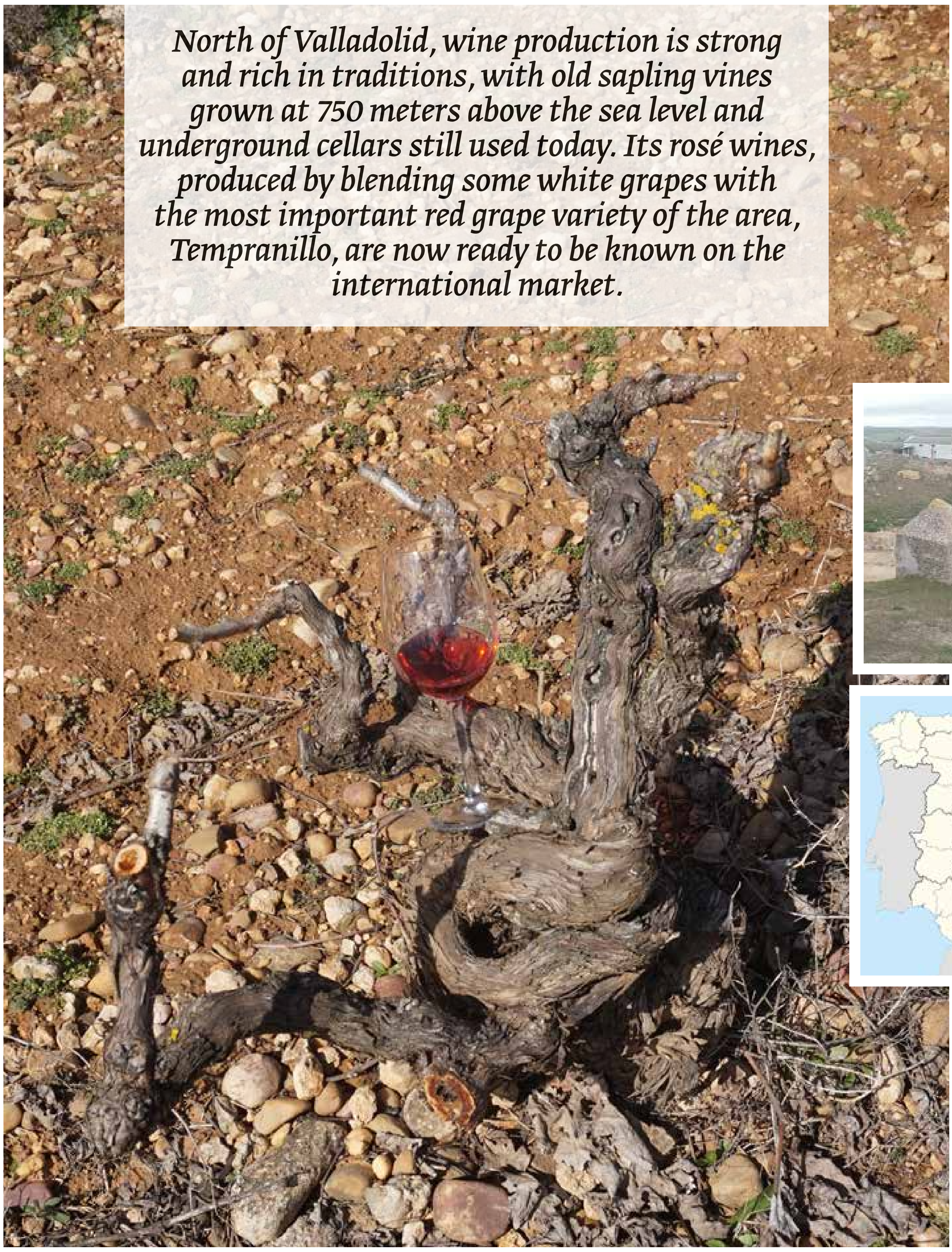
Health And Wine On The Comitè Vin's Political Agenda

By **GIULIO SOMMA**

Top Mauricio Gonzalez-Gordon
Bottom Domenico Zonin

Together with the crisis-management connected to the Russian-Ukrainian conflict, a priority in the strategy of the new leadership of the Comitè Vin (CEEV)- the main representative body of the wine industry of the old continent- is the concern for the impact on wine of the World Health Organization world policies against alcohol. It is necessary to strengthen the political lobbying action of the Comité Vins towards the European Parliament, said the Italian vice president, Domenico Zonin, while for Ignacio Sánchez Recarte, general secretary of CEEV, scientific research must be further developed in order to support a correct education towards responsible drinking.
The fight against the anti-alcohol scientist ideologies, that from the WHO have also reached the politics of the European Union, stands at the top of the political agenda of the new board of the CEEV, which elected as president the Spaniard Mauricio Gonzalez-Gordon, who is also president of Gonzalez Byass. Along with the work to protect European wine from the direct and indirect consequences that hit the wine companies with the Russian-Ukrainian war, the battle to disseminate a culture of responsible drinking capable of opposing the reasons of science to ideological and prohibitionists crusades is confirmed as the main concern of the new managing group of the CEEV, which saw the renewal of the two vice-presidents, the Italian Domenico Zonin, past-president and councilor of Unione Italiana Vini, and the Portuguese George TD Sandeman, president of Acibev (association of wines and spirits of Portugal) who will assist the successor of the French Jean-Marie Barillère (Ceev president from 2013 to today) together with Cécile Duprez-Naudy (Gleve), Ettore Nicoletto (Federvini, Italy) and Michel Chapoutier (Umvin, France) with Jérôme Perchet (Ffva, France) as treasurer.
After the political victory last February, which saw the amendments to Europe's Beating Cancer Plan approved by a large majority of the European Parliament, the original text was modified by introducing the distinction between alcohol consumption and abuse, saving wine from the threat of the health warnings on the label (which would have treated wine as tobacco). But the awareness is that the war against a prohibitionist prejudice that comes from the WHO, and will continue to condition EU policies on promotion and taxation, is still far from being won. And this is clear in the words of the new president.
"The scenario is really worrying," Mauricio Gonzalez told our magazine. "We can say we have won this battle, but the debate is far from over. We had to face those who, based on highly arguable surveys, firmly believe that there is no safe level for the consumption of alcoholic beverages. On the other hand, we are convinced that there is clear scientific evidence that a moderate wine consumption can become part of a healthy lifestyle. In other words, it is necessary to be able to put the world's scientific knowledge at the basis of the political-decision-making process. At the same time, however, as a wine making sector, we must assume our responsibilities in effectively fighting the problem of alcohol abuse, as we have been doing for over ten years through our association Wine in Moderation."
In the next years the commitment to extend the basis of scientific research on the effects of eating habits, of lifestyles and alcohol consumption on people's health in general and on the incidence of cancer will have to be more relevant in all the world, highlighted Ignacio Sánchez Recarte, Ceev general secretary, while for the vice president Domenico Zonin it is necessary to work to modify, making it more effective, the political lobbying action of the Comité Vins towards the European Parliament. "The outcome of the vote of the Members of the European Parliament on the Beating Cancer Plan was undoubtedly positive - underlines Zonin - But I would like to remember that we only have won one battle and not the war. This story showed, a clear gap between what happens in the real world and what happens inside the buildings of Brussels, which appear completely disconnected and far from the common feeling. This worries me a lot because I see too much distance between those who decide and those who undergo decisions that influence their daily life and work, in other words between the politicians /decision makers and the citizens who sent them to the top of the institutions". The CEEV must work harder to "bring the supply chain closer to the European decision-maker, finding better ways of lobbying by evolving its strategies of action and pressure towards the political front in Brussels", he concluded.

THE AREA HOUSED THE ROSÉ SESSION OF THE CONCOURS MONDIAL DE BRUXELLES



North of Valladolid, wine production is strong and rich in traditions, with old sapling vines grown at 750 meters above the sea level and underground cellars still used today. Its rosé wines, produced by blending some white grapes with the most important red grape variety of the area, Tempranillo, are now ready to be known on the international market.

A Spanish Rosé With An Ancient History, And A Young Market

By **FABIO CIARLA**

It is with no coincidence that the rosé session of the Concours Mondial de Bruxelles 2022 was held in Spain, the second largest producer of "rosados" wines in the world with 25% of the total– mostly coming from Valladolid. It is enough to leave the ancient Spanish capital, the center of the Castilla y Leon region, and drive north to reach the Cigales area in 15 minutes. There, pink is the color of over 65% of the annual wine production. A strong, we could say ancestral link, with a breeding and winemaking system completely original. The vines are mostly planted with saplings systems, excluding some new espalier systems, on soils that are often very pebbly. The height is important, as its plateau has an average altitude of 750 meters above the sea level.
But to complicate things, comes the continental climate, which sees temperatures fluctuate between 39 degrees in summer and -6 in winter, and with a low rainfall, an annual average of 407 mm. In a word, cold winters and dry summers, where however viticulture has evolved for centuries, regaining strength after the invasions of central European populations and Arabs, who were then supplying wine to France at the beginning of the disaster of European vineyards due to Phylloxera, with an historical evidence of a production of 15 million kilos of grapes in 1888.
An important history, therefore, which materialized in a modern and solid project only in 1991, with the establishment of the Cigales Designation of Origin, renewed in 2011 with a new Regulation that opens to white, sparkling and sweet wines and mostly to vines such as Sauvignon Blanc, Cabernet Sauvignon, Merlot and Syrah together with the historic Tempranillo and Garnacha (reds) and Viura, Albillo and Verdejo (whites).
Currently the annual production, bottled for about 90%, counts on 2.5 million bottles of rosé wine (stable), 1 million of red (in decrease) and 50 thousand of white (in increase). At the moment the market is mainly national, with 70% of the production consumed in the region of origin, which includes other important cities such as Segovia and Salamanca. Yet in the 1990s, work concentrated also on exports, reaching initially northern Europe and the United States, mainly as a result of a surge in production which required an expansion of the area of consumption. Today, over 80% of exports, which in total touch 690,000 bottles mostly of red wine, is related to Europe... - with Belgium, Germany, Sweden and Switzerland in the first place -, while about 12% concerns the United States and the remaining portion, Asia.

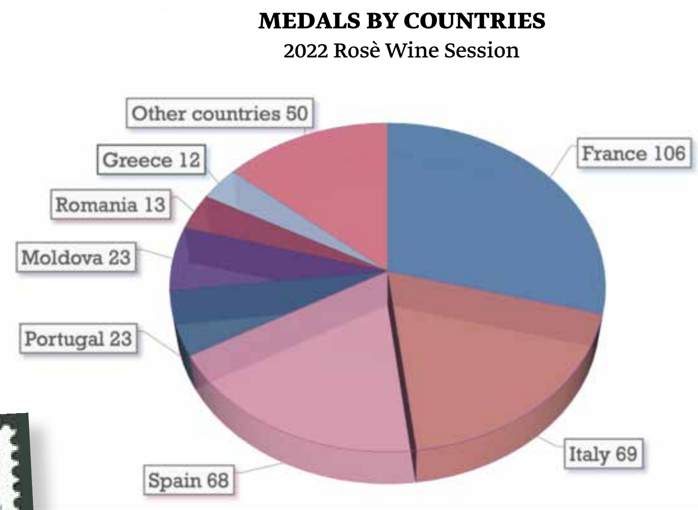
José Carlos Álvarez Ramos

Traditions And Enology

There are about 1,200 underground cellars in the Cigales area, a true historical and cultural heritage, which still today narrate a wine-growing history of great importance, comprising wine storage and wine-tourist hospitality. In the "caves," the wine was first produced and then stored, taking advantage of a stable temperature all throughout the year – as is a tradition in Italy, but perhaps here even more due to the summer / winter gap. The production is very complex and very burdensome, more than one can imagine, starting from the openings of these small hills, and since the excavated earth was placed above the cave to create even more isolation, the grapes were thrown in a first room to a depth of 7/8 meters. From here, it was then transferred to a second area where, having created a sort of "cube" thanks to the stalks and manual compaction, it was pressed with a very ingenious system of weights and beams. All this, of course, with inclinations in the floor towards the must collection areas and, fundamentally, several "chimneys" connected with outside that allowed the exchange of air for a very dangerous process in closed places, such as that of alcoholic fermentation. A lot of manual work, for the final part but also in the initial part, that starts in the vineyard, with historical sapling cultivation almost always mixed, mostly red berried Tempranillo and Garnacha and different white berried varieties, such as Albillo and Verdejo and Viura. Expanding the vision to the other rosés wines of the Region, the agronomist and oenologist **José Carlos Álvarez Ramos** of the University of Valladolid put it simply.
"The production of multi varietal rosé is of vital importance for the protection and promotion of minor varieties such as Grenache gris, Monastrel, Garnacha tintorera and others reds," he said. "But also for Albillo, Jaen, Puesta en cruz, Doña blanca and Pirulés for the whites. If it wasn't for the rosé wines, these varieties would not occupy the place they deserve among the great whites and reds of Castilla-y-León, in this sense I firmly believe that rosados also defend our historical varietal heritage."

Returning specifically to Cigales, here the tradition planned a single harvest, a process that for agronomic and oenological techniques appears archaic and qualitatively not interesting. But it stayed on his feet, perhaps in an unexpected way even after the modernization of the sector. Studies carried out in the area, in particular by the research institute of Castilla y León, have led to the conclusion that adequate proportions of white grapes, Sauvignon Blanc has recently been added to the historical ones, and red ones, with the novelties of Merlot and Syrah , have led to the production of a traditional Cigales rosé wine. Wines with an intense color but very bright, different from the Provencal trend but also from the shades of Bandol or of Cerasuolo d'Abruzzo. In terms of color, they are similar to the rosé wines of Puglia, but smell and taste are definitely original thanks to the altitude, the cold and long winters but above all to the use of white grapes.

Concours Mondial BRUXELLES
The United Nations of Fine Wines



THE RESULTS OF THE FIRST SESSION FOR 2022 OF THE CONCOURS MONDIAL DE BRUXELLES

Pink Is Always French. But The Surprise Is MOLDOVA

Last month, France, Spain and Italy confirmed to hold the top three positions, but there are significant news arrivals from Eastern Europe. Here is what to expect from the next session in Italy devoted to white and red wines

France was confirmed to be a reference point for quality and quantity of rosé wines also in the session of the Concours Mondial de Bruxelles dedicated to this typology, which was held in Spain at the beginning of March. The approximately 1,000 wines competing, from almost 30 different countries, were evaluated by 60 judges who arrived in Valladolid for three days of tastings which to some people gave a picture that was for some aspects predictable, but was surprising for others. As already mentioned Provence, but also all other important areas of France, had many awards, a total of 106 medals, followed by Italy with 69 and Spain with 68, on the second and on the third step of the podium. For the French also the largest number of Grand Gold Medals, 5, followed however - and here the surprises begin - by Italy, Spain and Moldova with two awards each, while the remaining two still go to the East Europe with Romania and the Czech Republic, expressing respectively the best sparkling wine and the best semi-dry. Moldova ranks, in terms of number of medals, fourth together with Portugal, a truly unexpected result if we think of the small production of a country which, unfortunately, in this period is named more often for the war events, being at the west right on the border with Ukraine.

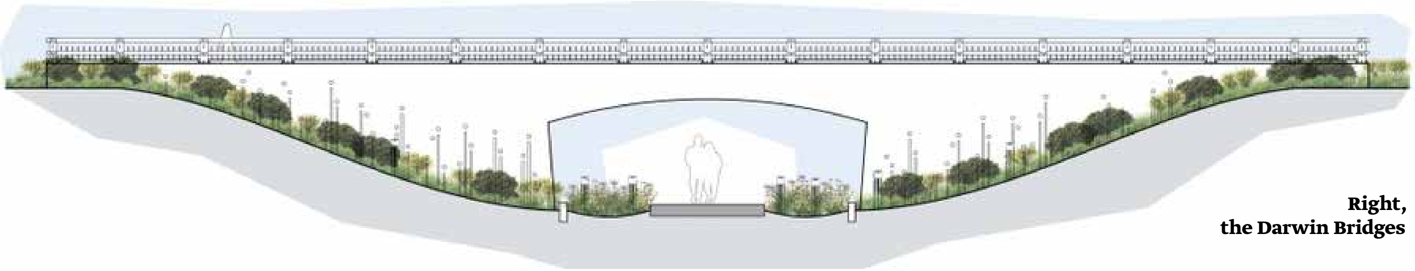
But the Spanish appointment of the competition that has Baudouin Havaux as president and Thomas Costenoble as director, was not limited to tastings sessions. It also included moments of in-depth analysis of the territory and of the rosé typology in general, as in the case of the intervention of **Elisabeth Gabay**, Master of Wine and a world's great rosé wine expert. Ms. Gabay confirmed the great vividness of the world of rosé wines, considered a separate category in the wine sector, being transversal, able to bring closer new generations and with a very important glamorous vocation. Concepts highlighted with concrete examples, in particular, with the presence of international stars in the field of rosé wine production, as we also told in the specials on rosé wines of our magazine last year (Wine World Magazine of June and October 2021). Elisabeth Gabay still placed full confidence in the future of rosé wines.

Elisabeth Gabay

"I really wish the wine trade market would not be ashamed of rosé wines," she said. "That wine producers and buyers would recognize all the diversity of styles, that the restaurant's wine list offered many different rosés, as much as red and white wines. There is still a long way to go to educate the market."

A market that according to the English expert could still expand in 2022, in particular with the "growth of premium and multi-premium rosés and regional identity."

The event in March is important, but included only a small part of what annually concerns the Concours Mondial de Bruxelles. Its largest session will be held in May and in Italy, the one dedicated to Whites (also Orange) and still Reds. Over 350 tasters, journalists but also many operators including buyers and importers will arrive in Calabria, in Cosenza and surroundings. They will be called to judge the wines in competition but with the possibility also, of course, to discover the beauties and winemaking traditions of the Calabria region.



Right, the Darwin Bridges

RECOVERY AND RECYCLE OF GLASS POWDER

Bottles of wine that “START” A NEW LIFE

By NANCY ROSSI

The incredible story of 70,000 glass bottles that became two bridges ...

SAQ sells annualy an average of 224 million bottles of wine: what happens to these bottles that, after having dominated the tables, go in the recycle basket?

It was 2004 when the *Société des Alcool du Québec*, the alcohol monopoly for the Canadian province of Québec, decided to invest in the Chaire SAQ de valorisation du verre dans les materiaux, a teaching position at the University of Sherbrooke whose purpose would be to enhance glass. Since then, a big deal of research has been funded and glass powder was found on the floors of SAQ branch offices, on the pavements of several cities and even on garden footpaths. However, the qualitative leap took place in 2021, when the glass powder from 70,000 bottles of wine was used in the two Darwin bridges, located on the Boulevard des Îles des-Sœurs in the greater metropolitan region of Montréal. It was a worldwide novelty. These two twin bridges were actually built with concrete formed in part from recycled glass powder, which is more ecological and basically should last from 25 to 50 years or more, compared with traditional concrete. It should be said that the researchers of the SAQ chair of the University of Sherbrooke had this idea and managed to realize it. These infrastructures did not go unnoticed, and in March 2021 they won two prestigious awards: the Excellence Award in the category of “Infrastructure 2021 of the American Concrete Institute (ACI) - for the Québec section, and the 2021 Excellence Award in the category of worldwide infrastructures, of the same institution.

But let’s see in detail the numbers of this ambitious construction. The two bridges have a length of 37 meters each and 2,800 tons of concrete were used to build them, 40 tons of which are glass powder. Glass powder therefore represents 1.6% of the materials employed, and according to the researchers’ calculations, it consists of about 70,000 recycled glass bottles of wine. It replaces 10% of the standard amount of cement. The detailed composition of the material used is the following: 78% gravel and sand, 14% cement, which acts as a “glue” (with high energy consumption), 6% water, 1.6% glass powder and 0.4% synthetic fibers. The advantages of using glass powder for the construction of these two bridges were many - stronger and more resistant concrete, able to last from 25 to 50 years and more than traditional methods; 40 tons of CO_2 less emissions, the equivalent of gas emitted by a car that travels around the Earth 5 times; 70,000 glass bottles of wine that don’t end up in dumping grounds.

Christian Marien-Pilon, director of social and environmental responsibility at SAQ, perfectly summed up the enthusiasm for this new use of glass powder.

“The integration of glass into concrete is a hyper-ingenious concept,” he said. “This is an incredible way to increase the durability of concrete by recovering a material that would otherwise end up in dumping grounds.”

Who knows how many bottles of Italian wine can be found in these two bridges.

Data source: SAQ press release

...And of Others That Became The Path Of The Garden Of The Future

But if you think that glass powder is to be found only in bridges in Canada, you are wrong. You can even find it in the educational gardens of the Québec government.

In 2014, Albert Mondor, a very well-known biologist with a passion for gardening in Québec, conceived and created “The Garden of the Future” at the Jardin Daniel A. Séguin, an educational garden of the Québec government. The idea was to recycle different materials and incorporate them into this new concept of gardens. In this garden, it is possible to find a sculpture by the artist Jeffrey McDonald: a giant spider built with various pieces of metal coming from a dumping ground, with several wire nets with various fat plants standing out, and last but not least, a path composed of powder glass coming from wine bottles. We are not dealing here with advanced technology, but rather with a utilitarian vision of a garden, based on recovery and recycling, and responding to the food and environmental challenges of tomorrow. In the garden of the future, edible and medicinal plants stand together with tropical and annual plants. In the garden, a huge industrial tank has been transformed into a shelter decorated with a collection of blue bottles that make a contrast with the red of the oxidized metal. This garden won the prestigious All-America Selections award in 2015.

NANCY ROSSI

Nancy Rossi’s name has been related for years to the international wine competition Sélections Mondiales des Vins Canada, as general manager. In 2020, she was appointed general director of Jardin Daniel A. Séguin, the educational garden of the Québec government’s Institute of Agribusiness Technology. Donna del vino, she currently collaborates with the Œnologues de France and is a taster in several competitions. In her spare time, she studies for a doctorate in International Political Economy at the ENAP-École Nationale d’Administration Publique in Québec.

CHILEAN WINE PRODUCTION EYES THE PAST TO BUILD ITS FUTURE

BY CECILIA ALARCÓN SALINAS

International Wine Consultant

Top, Cecilia Alarcón Salinas. Bottom, Díaz de Itata Winery, Fundo Cucha Cox

My last trip to Chile was remarkable and surprising at the same time. I started in the San Antonio valley, with their terrific white wine and pinot from cool climate, then I stopped briefly in Colchagua valley and finally arrived at Maule and Itata wine regions. This journey focused on rediscovering a part of the Chilean wine history and ancestral traditions, by visiting wineries and meet the growers, winemakers and professionals, who currently are contributing to changing the image of Chilean viticulture.

The new trends in the Chilean wine industry are marked by the big steps taken during the last 15-20 years, a revolutionary and very dynamic era with great innovations, where the new generation of winemakers and producers are looking for new territories, soils with specific geographical and climatic conditions, where the new frontiers of wine production are making the difference, with their unique sense of place and identity for new, distinguished wines.

Added to this development of the territory, there is a new interest in recovering “traditional grape varieties” and “old vines,” and Chilean ancestral winemaking techniques. Today, those vines, Uva País and Moscatel de Alejandría, which originally were introduced by the Spanish conquerors and Jesuit missionaries during the 15th and 17th - centuries. Later, during the 18th and 21st centuries, French varieties, as Cinsault, Carignan, Semillon, were introduced, and now are representing an invaluable “wine heritage” and part of a fascinating “Chilean reservoir.” The Chilean “genetic variety heritage” is, step by step, leading the way for new trends in the Chilean viticulture and drawing the attention of many winemakers and international buyers. Today, Maule and Itata wine regions (including Bio-Bio) have entered into a new development stage, thanks to the vision of entrepreneurs and the new generation of passionate winemakers. There are two important initiatives from wine associations in Maule to revalue ancient grape varieties; one is VIGNO, “Vignadores del Carignan,” which has recovered the production of Carignan grapes, and the other is ALMAULE, which is a new associative project to revalue the grape País. Both initiatives have created their trademarks, www.vigno.org, @almaule.cl In Itata, “Valle del Itata Enoturismo Ancestral”, a project is ongoing to promote wine tourism in the Itata Valley: https://rutadelvinoitata.com

Why is it so special with all those old vines, and which are their main characteristics?

The “dry-farmed vineyards” in the vast territories called “Secano Interior,” located in the Central and South valleys (Between Maule, Ñuble and Bio-Bio Regions) south of Santiago (260 km), and the “Secano Costero”, located mainly in the Coastal range.

Many of the wines produced from dry-farmed vineyards come from 100-150 years old healthy ungrafted vines, free of Phylloxera. The traditional ancestral goblet system is typical in dry-farmed vineyards, where the leaves foliage gives protection to the grapes from the sun and warm summers, and decades by decades those vines have been resistant, growing in extremely drought conditions.

Other characteristics in the Itata valley are that many of the small producers maintain ancestral cultivations of Moscatel de Alejandria and País, mixed with Torontel, Chasselas, San Francisco and Cinsault grapes, which gives an enchanting landscape and a unique local wine production (Pipeño, Chicha, Chacoli, Asoleado wines).

The history of Chilean viticulture and its old vines is in full evolution. Certainly, a fascinating task for many researchers, winegrowers, winemakers and for Chilean authorities to expose this great vine heritage worldwide, a heritage that represents the basis of today’s refashioning of Chilean wine production.

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THE WORLD OF WINE & BEVERAGE TECHNOLOGY IS RETURNING TO MILAN

Sustainability will be the focus of SIMEI 2022, the first edition of the wine technology fair since the pandemic began

SIMEI, the world's first leading trade fair for winery and bottling technologies, finally returns to Milan in 2022, following the forced break due to the Covid19 pandemic. As we know, the strong international connotation of the fair last year led the Unione Italiana Vini and the exhibitors to postpone the show, in anticipation of the difficulties that would have been encountered by operators travelling between different countries and continents.

The current situation certainly allows us to look to the future with renewed optimism. This, together with the industry's desire to meet again in person and the three-year interval during which suppliers have been able to perfect new technological developments, means that SIMEI 2022 is set to be the real edition of the new start.

SIMEI 2022 will be, as always and since 1963, "home" to the entire range of technology for the wine-making supply chain: process technologies, containers, finishing plants, packaging lines, end-of-line technology, process controls, measuring instruments, etc. With the addition of a new feature, that is the presence of the Enovitis Business fair, showing wine-making technology that will effectively and efficiently complete the range of product sectors for the winery.

The key theme in the exhibition halls at Fiera Milano, which will be hosting the trade fair in November, and in the events to be held over the four days will be the "sustainability" of production. The trade fair aims to be more and more the reference point for producers, exhibitors, associations and all professionals in the Wine&Beverage industry that adopt virtuous business models, able to safeguard and improve economic performance, while protecting the environment and the community.

What makes SIMEI an even more unmissable event is the programme of side events that will accompany the event. The programme is already well-defined, just undergoing the final tweaks. Starting from the Innovation Challenge, the competition that rewards technological innovations and that this year will also have a special mention for sustainable innovations. As always, many industry associations will come together in Milan during the fair to organise technical meetings, workshops and seminars, such as Assoenologi, Donne del Vino and, for the first time, the "Sustainable wine roundtable" that will be organising two events we will talk about on page 2-3 of this newspaper.

In addition, Unione Italiana Vini, as organiser of the fair, will be holding a conference focussing on the meeting between technology and sustainability, while other initiatives dedicated to the vineyard sector, again with seminars and technical workshops, will accompany the Enovitis business fair.

To complete the picture, with reference to the more general theme of "beverages," there will be an event specifically dedicated to the world of beer.

The dates for all players in the wine supply chain, who will be able to arrange an agenda of meetings through dedicated platforms, are therefore set from 15 to 18 November at Fiera Milano, a modern and functional exhibition centre, easily accessible thanks to the airports around Milan and local transport networks, with a wide selection of accommodation.

AN EXCLUSIVE INTERVIEW WITH IWSR AND WINE INTELLIGENCE ANALYSTS ON THE TRENDS FOR 2022

The premium market will soon be back stronger than ever diversifying the Ready To Drink offer. No-alcohol spirits are growing among LDA (Legal Drinking Age) Generation Z and Millennials, but alcoholic beverages as a whole seem not to have been affected, and will probably remain at the centre of the scene even in the recovery. E-commerce is increasingly solid, but is undergoing some transformation

The 2022 Global Market AT A GLANCE

By **GIULIO SOMMA** *&* **FABIO CIARLA**

"Beverage alcohol has proven itself to be one of the most crisis-proof consumer goods categories at a time of significant disruption. Although supply chain issues, increasing costs and recruitment struggles continue to challenge the industry, consumers are increasingly comfortable with returning to the on-trade in many markets, especially the Millennial and Gen X cohorts".

This is how **Mark Meek**, CEO of IWSR Drinks Market Analysis, has summarised an evident trend, a clear movement, in the general uncertainty of the pandemic period and of the recovery that now seems to be underway. Understanding which direction the wine market will take in the near future is a very hot topic, because many are looking for certainties in their daily business, while the most prudent want to gain a better interpretation of trends in order not to miss any opportunities. From this point of view, the reports by IWSR Drinks Market Analysis (IWSA - International Wines and Spirits Record) and by Wine Intelligence (division of IWSR Group since January 2021), global specialists in the beverage sector, are essential for both. Moreover, considering the changes caused by the war in Ukraine, being able to count on data and forecasts of such a prestigious institute in the wine sector, but also the entire world of spirits, is particularly important. That leads to a series of reflections that emerge both from the analysis of the key trends that guide the global market landscape, and from the focus on some particular aspects that have been studied in depth by other IWSR experts, starting with **Guy Wolfe**, strategic insights manager, in addition to **Richard Halstead**, CEO of Wine Intelligence, and **Lulie Halstead**, CEO of Wine Intelligence.

Mark Meek

GROWTH TRENDS IN ALCOHOL CONSUMPTION ON THE MAIN INTERNATIONAL MARKETS

Here are the key trends driving the global beverage alcohol market landscape

1. Emergence Of Non-traditional Luxury Categories

Although international status spirits (spirits sold at US$100 and above, excluding Baijiu) suffered declines in 2020 at a rate that exceeded that of the total global spirits market, IWSR expects a bullish rebound in line with previous growth levels of 2014-2019. Future category growth will be underpinned by increasing levels of wealth and new market entrants - especially in Asia and the US. IWSR consumer research, for example, shows that 39% of urban affluent Chinese alcohol drinkers said they had spent over RMB 500 (approx. US$79) on a bottle of alcohol to drink at home in the first half of 2021. As new consumers enter the market, a key disrupter to the current international status spirits landscape is segment diversification and the emergence of niche status categories - such as agave-based spirits, Irish whiskey, US whiskey and Japanese whisky, which all registered absolute growth in 2020.

2. Substituters vs Blenders. Moderation Choices Are Driven By Consumption Occasion

No- and low-alcohol products are becoming more approachable for consumers as they are increasingly accepted as a lifestyle and societal norm. Channels solely dedicated to selling alcohol-free drinks for adult occasions are also on the rise, with dedicated e-commerce sites, retailers and bars coming to market. A distinction in how and when consumers choose no- versus low- products is becoming increasingly evident. Across key markets, the majority of no/low consumers can be identified as 'Substituters' - those who use no- and low-products in place of full strength for certain occasions. IWSR consumer research shows that in the UK, for example, 40% of no/low consumers are 'Substituters', with LDA Gen Z and millennials (46% and 41% respectively) more likely to substitute than Boomers (36%). LDA Gen Z and millennials in the UK are also more likely to be 'Blenders' where they switch between no/low and full-strength on the same occasion (20% and 23% respectively). A similar trend can also be seen in other markets, such as the US. Tapping into no-alcohol occasions, new technologies are also enabling producers to launch alcohol-free products that offer mood-enhancing or functional benefits, many with ingredients such as CBD, nootropics and adaptogens. These products focus on how ingredients will make consumers *feel*, and are seen as an alternative way to enjoy traditional alcohol occasions - tapping into health conscious (and stressed out) consumers.

3. E-commerce Landscape Becomes More Nuanced As Sub-channels Blur

The value of E-commerce increased by almost +43% in 2020 across 16 key markets, up from +12% in 2019. IWSR data shows that by 2025, in these markets e-commerce is projected to represent about 6% of all off-trade beverage alcohol volumes, compared to less than 2% in 2018. As E-commerce alcoholic-drinks sales develop, the number of retailers is increasing and the range of business models they employ is becoming more diverse and nuanced. Distinctions between different e-commerce channels, and even between online vs offline purchasing, are becoming increasingly irrelevant to consumers. This is leading to a blurring of lines between online sales channels - for example, omnichannel retailers are establishing logistics partnerships with on-demand services in order to offer faster delivery; on-demand platforms are using 'dark stores' to improve delivery times and so become more like marketplaces; and marketplaces are establishing networks of physical stores.

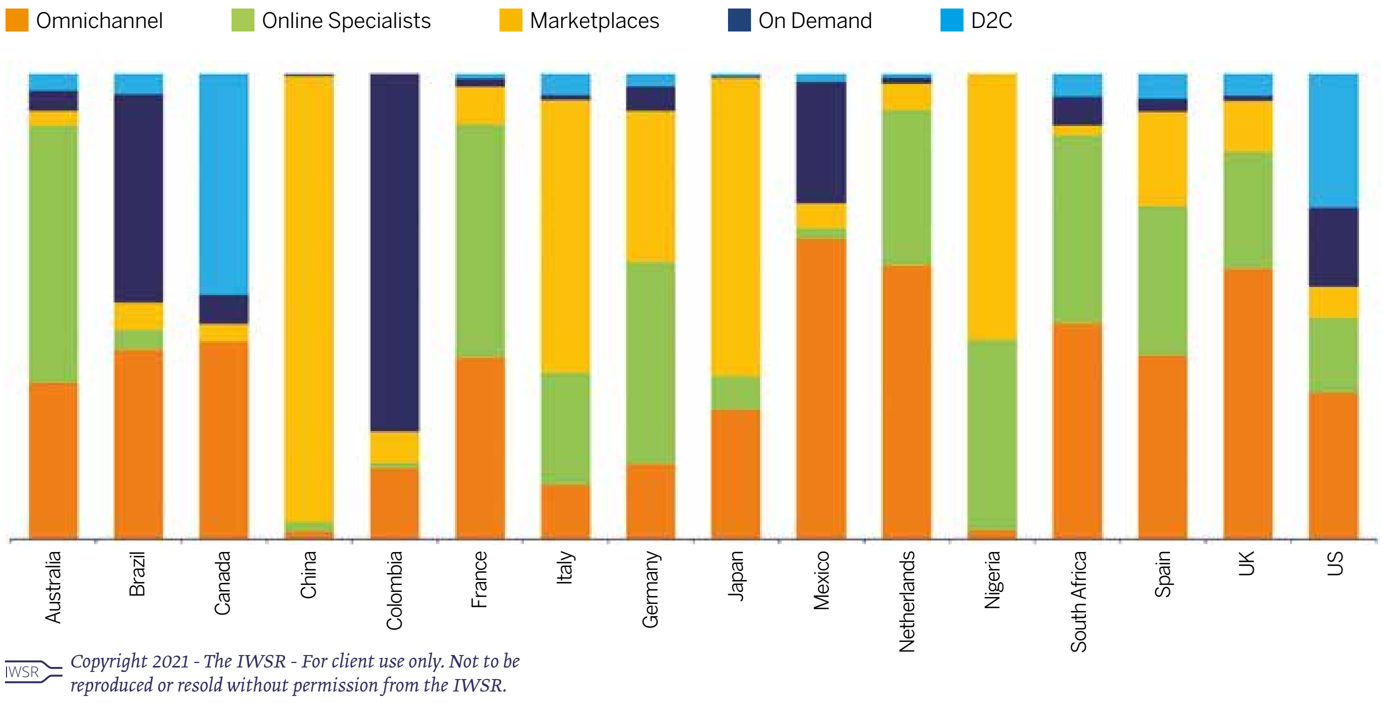
4. A More Sophisticated Home-premise Impacts The Return Of The On-premise

Changes in living location, work commutes and hybrid working policies mean that consumers are spending more time at-home and in local on-premise venues. As such, IWSR findings indicate that premium consumption may potentially shift, to some extent, from the on-trade to the home-premise. As consumers return to the on-trade, their experiences will be shaped by the last two years of premium at-home experiences, such as at-home cocktail-making and subscription services. Consumers will therefore be more conscious of higher prices and more easily deterred by poorer quality products or experiences in bars, pubs and restaurants. IWSR expects brand owners to be more selective in where they support their brands in the on-premise, likely increasing focus on the top-end and most active on-trade accounts.

Total E-commerce Alcohol Value by Channel

Differences in how beverage-alcohol e-commerce has evolved in individual markets means there is no standard model, with considerable variation in channel structure between countries

Source: IWSR E-commerce Strategic Study 2021



5. Early Signs Of Premiumisation In RTD Category
New RTD launches coming to market have a higher representation of premium-and-above products than volumes consumed in 2020, suggesting a trend towards premiumisation. This marks a clear diversion from RTD innovation so far, with the vast majority of the global RTD category currently sitting within the standard-and-below price bands. The move towards premiumisation will appeal to spirits and wine brand owners, as most of the value growth within the broader spirits and wine categories over the past decade has come from the premium-and-above segment. While flavour is the primary purchase driver for RTD selection by consumers in key markets, alcohol base (as well as cocktail type) are also significant motivating factors, with consumers more likely to perceive spirits-based products as being of higher quality. Spirits-based RTDs already dominate the category in most key markets – apart from in Mexico, and, most notably, in the US, where malt-based RTDs dominate. Although spirits-based RTDs hold a minority share in the US, their small volumes are driving the development of a super-premium segment – the first to be seen across the global RTD landscape.

6. Diversification As Category Lines Blur
People are switching with increasing frequency between beverage options or trialling completely new beverages. IWSR research shows a wide repertoire of product trials, with consumers showing strong interest in trying craft beer, hard seltzers, wine and Japanese whisky. Drinks companies are responding by moving into previously unexplored categories to diversify their portfolios and in some cases, proactively plan for the softening or decline of existing core brands and/or categories. Diversification also better positions beverage alcohol categories to address changing consumer tastes and the blurring of lines between traditional soft drinks and alcohol, or alcohol adjacent products, such as CBD and other enhancements. Companies are no longer selling products to groups of consumers, but are selling products that fit particular consumption occasions. Having a wider portfolio allows them to be more exhaustive in

their approach, better understand the adjacent and competing categories, and use small-scale investments to learn more about new products and occasions.

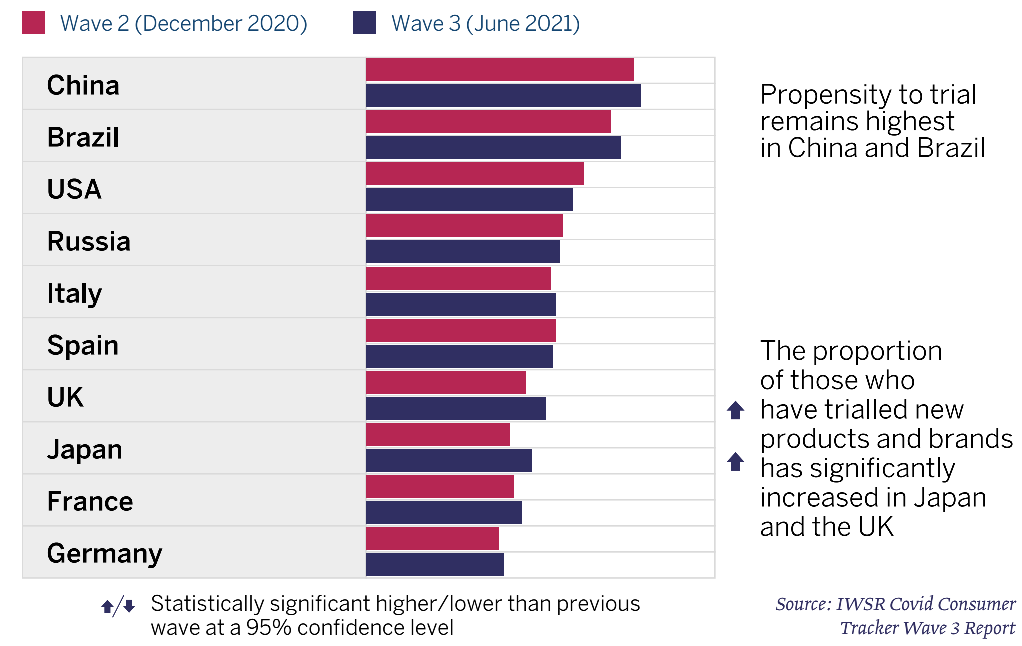
7. Clear Commitments To Sustainable Practices
Sustainable packaging solutions have been at the top of corporate and social responsibility agendas in the drinks industry for many years. But concerns around climate change have been growing in intensity, especially following events such as COP26. Influential figures across the industry, as well as consumers, are increasingly looking for drinks companies to show a clear commitment to sustainable practices. Solidarity with local brands and businesses has also been a key trend during the pandemic, and is one that is closely associated with consumers' sustainable mindset. For example, consumer research from IWSR shows that 48% of US alcohol drinkers say their purchase decisions are positively influenced by a company's sustainability or environmental initiatives; rising to 72% among Brazilian alcohol drinkers, and 70% of urban affluent Chinese alcohol drinkers. Shaky international supply chains and relative price were not the only drivers of this trend: in many cases, consumers reported they also wanted to 'do their bit' for the local economy. Building on this crisis response, local brands may hope to reinforce their status for the long term by emphasising sustainability, quality and community values.

8. External Pressures
Factors beyond consumer demand continue to impact production and route-to-market for the global beverage alcohol industry. Rising packaging costs, container capacity and other supply chain issues, inflationary pressures, and environmental change will impact some suppliers significantly. Some companies may therefore need to be more tactical and adjust some of their near-term market and brand strategies to adapt to the economic and operating environment. Brand owners should also be conscious of false positives witnessed through 2020 and 2021 that will revert to previous historical trends, especially as international travel resumes. Particularly for premium beverage alcohol, the past two years saw a marked shift in where products were purchased – a trend that may reverse as the market normalises. As such, purchasing spikes seen in domestic markets throughout 2020 and 2021 will likely face some downwards correction going forward.

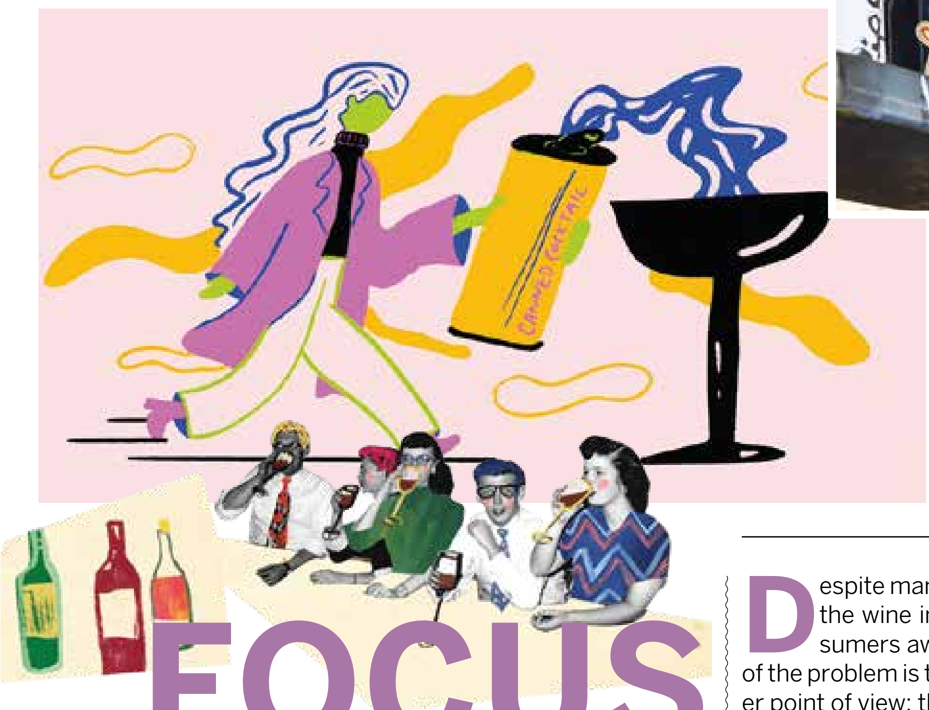
KEY CHANGES IN CONSUMER TRENDS: BEVERAGE TRIAL

Beverage Trial by Market - Wave 2 vs Wave 3

Proportion of consumers who say they have tried a new alcoholic beverage product or brand within the past six months. Asked of respondents in Wave 2 and Wave 3, all markets, n≥1.000



Source: IWSR Covid Consumer Tracker Wave 3 Report



FOCUS

1. WHAT IS THE TREND OF SO-CALLED ALTERNATIVE WINES (NO ALCOHOL, CANS, ETC.)? WHAT "CONTAMINATION" IS THERE BETWEEN WINE AND RTDS?

"Canned wine made huge strides in 2021, both from a technical and a sales point of view, and this will continue in 2022," **Richard Halstead**, CEO of Wine Intelligence, a division of the IWSR Group, said. "However, the big innovation will come from industry building new product sub-categories in wine that hit both of the growing trends of the 2020s: wine in a portable, single serve format, with a low-alcohol formulation that turns it from wine to a wine-based sparkling drink."
The continued growth of RTDs, especially in the US, is being led by an unprecedented bout of innovation in the category, and remains on course to grow substantially in 2022, according to forecasts from the IWSR. More astute RTD manufacturers are looking for ways in which they can premiumise their offering, which at the moment is largely focused around spirits-based beverages, using premium branded whiskies, rums and gins to drive consumer demand up the price ladder.
There is also an increasing focus on flavour, according to the IWSR's in-house market experts, which will see a shakeout of poorly formulated, low-value RTDs. Eventually, the same logic of successful RTD innovation – marquee brands, better flavours – will likely be applied to premium wine products.
"We expect the first movers here will be the sparkling wine producers, especially Champagne houses with an eye on extending their reach into the low alcohol / single serve space," Mr. Halstead said.

2. WITH REGARD TO SUSTAINABILITY AND ORGANIC, HOW STRONG IS CONSUMER SATISFACTION AND THE WILLINGNESS TO PAY MORE FOR THEM?

Despite many worthy efforts over the past three decades, the wine industry has yet to find a way of peeling consumers away from their love of a 75cl glass bottle. Part of the problem is that glass bottles work so well from a consumer point of view: they seem more environmentally friendly than plastic, they convey reassurance by reflecting the values, tradition, and quality of wine, and they look good on a table. Wine Intelligence consumer research shows that 55% of regular wine drinkers across key global markets consider glass to be a "sustainable" form of wine packaging, compared with 35% who thought that a bag-in-box was sustainable. Wine Intelligence consumer research also shows that male regular wine drinkers have a higher connection with sustainability than female regular wine drinkers, with a higher proportion of men claiming they are willing to spend more on a sustainable product and are more willing to give up convenience for a sustainable product, perhaps challenging some industry held stereotypes. Less surprisingly, it is younger regular wine drinkers (LDA Gen-Z and Millennials) who are significantly more connected to sustainability in wine.
"Perhaps a key challenge – and opportunity – for wine lies in the fact that wine drinkers currently believe that wine – particularly wine in glass bottles – is already 'sustainable', particularly in comparison to other drinks categories," said **Lulie Halstead**, CEO of Wine Intelligence, a division of the IWSR Group.
In fact, stating that a wine is "natural" on the front label increases the likelihood to buy amongst US wine drinkers by 8% compared to the same wine which has no additional claim. When interviewing US drinkers, there is often a confusion between wine made in a natural method versus wine in general, with them typically believing that "all wine is natural."

3. AT WHAT STAGE IS THE DEVELOPMENT AND WHAT ARE THE PROSPECTS FOR ALCOHOL E-COMMERCE? WHAT ARE THE MARKETS AND CATEGORIES THAT WILL DRIVE GROWTH?

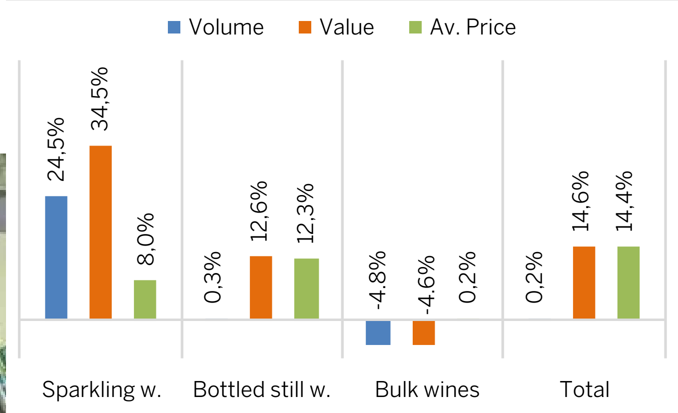
Over the next five years, total beverage alcohol e-commerce sales across key global markets are expected to grow by +66%, to reach more than US$42 billion, according to IWSR findings. Among 16 focus markets examined by IWSR (Australia, Brazil, Canada, China, Colombia, France, Germany, Italy, Japan, Mexico, Netherlands, Nigeria, South Africa, Spain, the United Kingdom and the United States), e-commerce value increased by about +12% in 2019, and then by almost +43% in 2020 during the height of the pandemic. Looking ahead to 2025, e-commerce is projected to represent about 6% of all off-trade beverage alcohol volumes, compared to less than 2% in 2018. The greatest forecast of E-commerce value growth will come from the US, thanks to average annual growth in the country of about +20%, which will see it become the top global market for online beverage alcohol. China, which currently accounts for a third of total e-commerce value, is expected to expand less rapidly, but still contribute substantial value.
IWSR findings also show that online business models for alcohol sales are becoming more diverse, leading consumers to increasingly shift between channels and retailers according to their specific needs at any given time. In general terms, the online beverage alcohol space can be perceived as two distinct, but overlapping, worlds: more "traditional" e-commerce – often omnichannel or online specialists – accessed via websites and used by older consumers seeking good prices and known brands and who are prepared to wait for delivery; and more "modern" app-driven e-commerce – often on-demand or marketplaces – used by younger legal drinking age consumers willing to pay for rapid delivery and looking for interesting/premium brands.
"Given the pandemic and overall changing consumer shopping behaviour, it's certainly not surprising that alcohol e-commerce is growing very quickly," **Guy Wolfe**, Strategic Insights Manager, IWSR Drinks Market Analysis, said. "But what's interesting is to see the significant variations that have developed both across and within markets in how different consumer groups shop via e-commerce and what their priorities are. E-commerce has clearly become engrained for many consumers, cementing its place as the third sales channel for beverage alcohol purchase."
Consumer research conducted by IWSR found that around one-quarter of alcohol drinkers across the globe report buying alcohol online, with two-thirds having made their first purchase pre-pandemic. China has the highest proportion of online shoppers among all beverage alcohol buyers, at nearly 60%, and the US has the highest proportion of online buyers who made their first purchase during the pandemic (54%). In most markets, wine is the largest major alcoholic drinks category in e-commerce (representing about 40% of total e-commerce value), with notable exceptions being China, Colombia, Mexico, and Nigeria, where spirits lead online sales by value. Although currently accounting for less than one-fifth of total e-commerce value, beer, cider, and RTDs are expected to grow strongly over the next five years, gaining share mainly from wine.


Richard Halstead

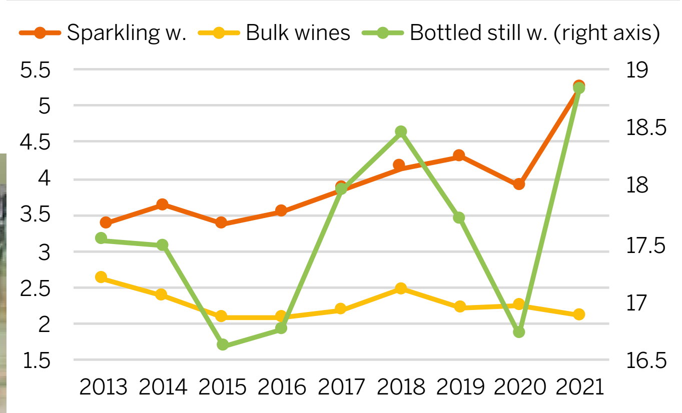

Lulie Halstead


Guy Wolfe

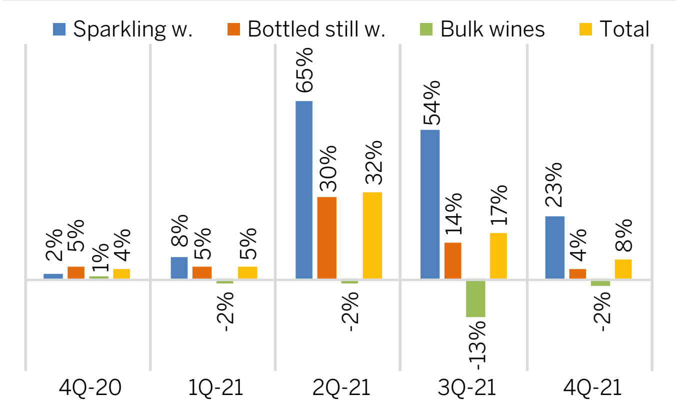
1. WORLD TRADE: ANNUAL % CHANGE BY TYPE



2. WORLD TRADE EVOLUTION (BILLION US$)



3. WORLD TRADE: % CHANGE BY QUARTER (VALUE)



2021 FINAL BALANCE

A Year Doped By Revenge Spending

Over 26 billion dollars in turnover, sparkling wines over 6,4 million hectolitres, beating all records, with performances that without Covid would have only been achieved in five years. Will these levels remain? Or will there be a return to more normal quotas? But above all, how: gliding or tumbling?

By CARLO FLAMINI - *Wine Observatory*

Over 26 billion dollars in value is a historic record for world wine imports, which grew by 15% in 2021, but with a difference in the pre-pandemic data. The difference between 2019 and 2021 amounts to two billion dollars, one of which is particularly influenced by the sparkling wine sector. Sparkling wines have been the real engine of the recovery, with a 35% growth in value which is also associated with a +25% increase in volumes, rising to over 6,4 million hectoliters *(charts 1 and 2)*.

The year 2021 has been extraordinary, literally- outside any preconceived scheme, somehow "doped." Phenomena such as "revenge spending" have interested all the major consumer countries, which in 2020 accumulated 2,9 trillion dollars in savings. A flow of unspent money that in 2021 - as far as wine is concerned, but it could also refer to spirits - merged into premium and ultra-premium product categories, such as the case of Champagnes on the American market (see the related paragraph).

The question at this point is more than legitimate. Can these peaks be considered a new "index 0," or are they destined to recede? And, in this second case, will the return be gradual or - given the current global macroeconomic situation dominated by inflation - will it roll precipitously downstream?

Certainly, if we divide the 2021 trend by trimesters *(chart 3)*, there has already been a hint of a return: on total exchanges, performance in terms of value, we have gone from +32% in the second quarter to +17% in the third to arrive at +8% in the fourth. Reductions of 50% in terms of basic points that involve all sub-categories, with more evidence for the segment of packaged still wines, already down to +4% in December from the peak of +30% in June. But the sparkling wines themselves have already drawn an inverted "V" shape, with a peak of +65% in June and a precipitous descent to the valley in December at +23% *(chart 4)*. Here it is more than likely that we will return to the pre-Covid quarterly average, that is +5-10%. Which for a segment now considered to be mature is still a good result.

SPARKLING W.

	,000 Litres			,000 US$			US$/litre		
	2020	2021	% Chg.	2020	2021	% Chg.	2020	2021	% Chg.
USA	143.478	197.486	37,6	1.257.490	1.842.959	46,6	8,76	9,33	6,5
UK	140.097	167.735	19,7	757.968	985.819	30,1	5,41	5,88	8,6
Japan	35.435	38.602	8,9	542.531	650.508	19,9	15,31	16,85	10,1
Germany	61.736	72.693	17,7	430.120	523.966	21,8	6,97	7,21	3,5
Russia	46.870	60.276	28,6	220.553	281.179	27,5	4,71	4,66	-0,9
Switzerland	20.851	23.499	12,7	202.218	254.792	26,0	9,70	10,84	11,8
Canada	17.646	21.175	20,0	163.108	231.261	41,8	9,24	10,92	18,2
France	27.915	34.337	23,0	103.836	136.073	31,0	3,72	3,96	6,5
China	9.799	11.153	13,8	71.859	113.618	58,1	7,33	10,19	38,9
Hong Kong	2.119	3.074	45,1	73.347	107.170	46,1	34,61	34,87	0,7
South Korea	5.072	6.962	37,3	46.432	77.825	67,6	9,16	11,18	22,1
Brazil	4.947	5.313	7,4	19.097	24.816	29,9	3,86	4,67	21,0
Total	515.963	642.304	24,5	3.888.557	5.229.987	34,5	7,54	8,14	8,0

BOTTLED W.

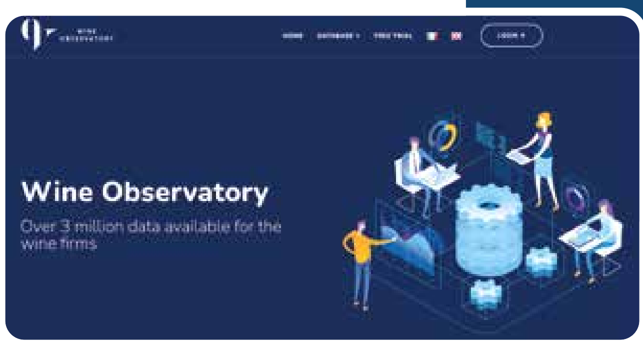
	,000 Litres			,000 US$			US$/litre		
	2020	2021	% Chg.	2020	2021	% Chg.	2020	2021	% Chg.
USA	704.295	740.650	5,2	4.020.294	4.792.259	19,2	5,71	6,47	13,4
UK	686.339	669.697	-2,4	2.667.991	2.906.746	8,9	3,89	4,34	11,7
Germany	528.314	521.911	-1,2	1.888.707	2.065.793	9,4	3,57	3,96	10,7
Canada	284.798	276.484	-2,9	1.696.153	1.902.309	12,2	5,96	6,88	15,5
China	311.082	285.501	-8,2	1.656.335	1.457.846	-12,0	5,32	5,11	-4,1
Hong Kong	35.496	35.568	0,2	893.868	1.258.055	40,7	25,18	35,37	40,5
Switzerland	102.243	108.270	5,9	947.456	1.107.737	16,9	9,27	10,23	10,4
Japan	164.513	156.652	-4,8	948.674	986.143	3,9	5,77	6,30	9,2
Russia	280.900	282.574	0,6	852.839	869.734	2,0	3,04	3,08	1,4
France	95.590	98.836	3,4	472.648	560.751	18,6	4,94	5,67	14,7
South Korea	44.592	63.911	43,3	275.361	469.255	70,4	6,18	7,34	18,9
Brazil	145.875	153.088	4,9	400.760	449.254	12,1	2,75	2,93	6,8
Totale	3.384.037	3.393.144	0,3	16.721.084	18.825.881	12,6	4,94	5,55	12,3

BULK W.

	,000 Litres			,000 US$			US$/litre		
	2020	2021	% Chg.	2020	2021	% Chg.	2020	2021	% Chg.
UK	574.343	466.814	-18,7	775.850	667.003	-14,0	1,35	1,43	5,8
Germany	793.731	790.209	-0,4	556.219	528.620	-5,0	0,70	0,67	-4,5
USA	372.021	442.494	18,9	311.933	398.588	27,8	0,84	0,90	7,4
France	485.450	441.540	-9,0	271.857	228.695	-15,9	0,56	0,52	-7,5
China	103.778	121.306	16,9	91.618	107.390	17,2	0,88	0,89	0,3
Canada	136.370	110.893	-18,7	87.514	81.844	-6,5	0,64	0,74	15,0
Switzerland	49.697	48.202	-3,0	74.008	76.281	3,1	1,49	1,58	6,3
Japan	43.531	35.055	-19,5	49.207	39.497	-19,7	1,13	1,13	-0,3
Russia	24.744	3.105	-87,5	15.256	2.096	-86,3	0,62	0,68	9,5
Total	2.583.664	2.459.616	-4,8	2.233.463	2.130.014	-4,6	0,86	0,87	0,2
Aggregate total	6,483,664	6,495,064	0.2	22,843,104	26,185,882	14.6	3.52	4.03	14.4

Note: % change based on USD. Please check the single countries for their currencies.

WINE OBSERVATORY

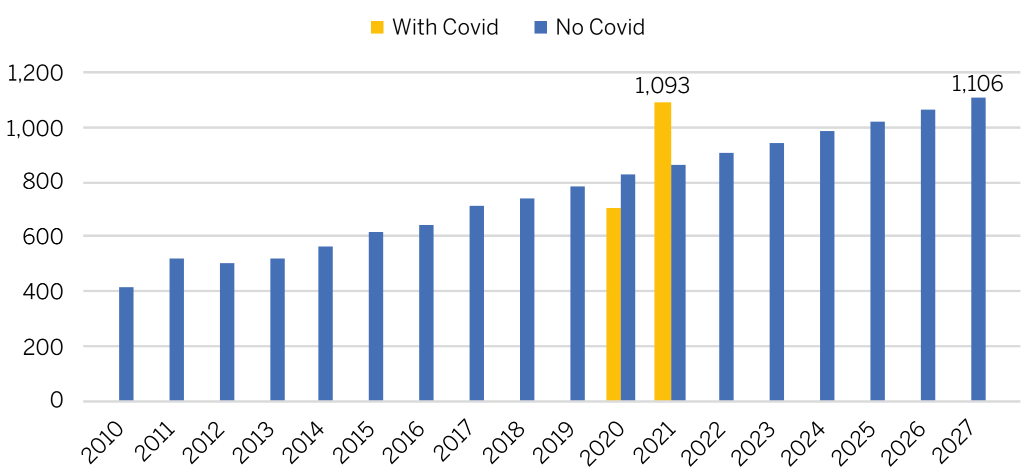


Stay informed with the Wine Observatory latest data

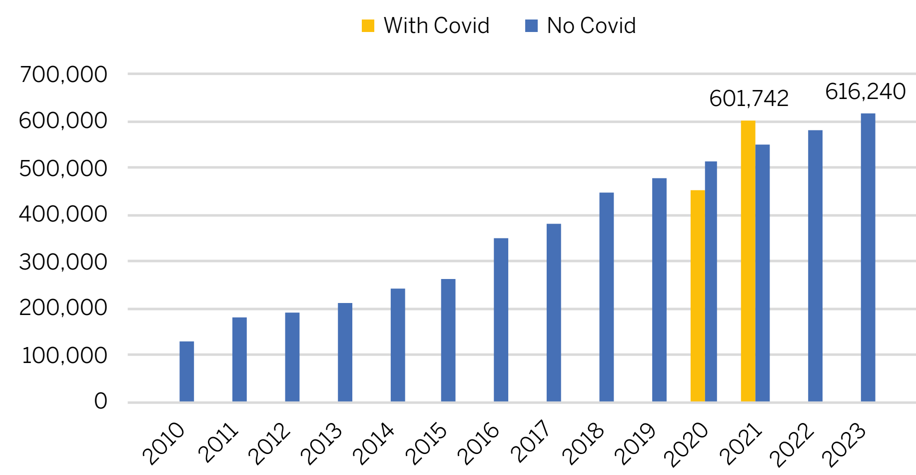
The data and analyses presented in these pages are provided by the Wine Observatory of the Unione Italiana Vini. At the address **www.wine-observatory.com** data from over 80 countries are available, from the largest importers to the smallest ones, divided into the categories of sparkling wine, still packaged wines, bag-in-box and bulk wines. The database allows for queries at various levels of depth to check the values in the main international currencies, to build datasets and to elaborate dynamic graphs, as well as the possibility of downloading data in Excel format. The platform, entirely in English, can be accessed through the free-trial function, which allows one to query the entire database for 48 hours.

MARKET ANALYSIS

5. FRANCE: SPARKLING WINES TO THE US - BILLION US$



6. ITALY: SPARKLING WINES TO THE US - MILLION US$

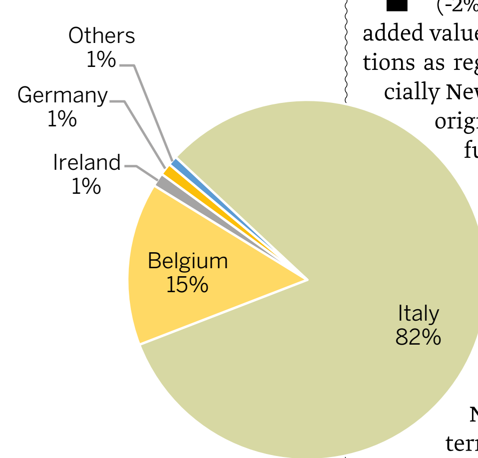


THE UNITED STATES

The American market canceled the Covid downturn, and in 2021 grew by 26% in value, exceeding for the first time in history a 7 billion dollar turnover at customs. This figure also beats 2019, the pre-pandemic year, which closed at 6,2 billion dollars, exceeding it by 14%. Volumes were also growing strongly, with a total just under 14 million hectoliters, equivalent to a homogeneous growth of 13% over 2020 and 2019. Sparkling wines are the main agents of growth. In value, the sum of 1,8 billion dollars was reached, with an increase of 50% in 2020 and 34% in 2019. And the main characters were Italian sparkling wines, which grew by 33% and 26%, over 600 million dollars, but above all the Champagnes: the one billion and 100 million dollars of turnover (+55% per annum), in addition to representing an absolute record, is equivalent to the value that French wines would have reached - in pre-Covid times - only in 2027 *(chart 5)*.

Basically, in only one year Champagne achieved everything it would normally have accumulated in seven years. It should be noted that the prices of Champagne remained practically stationary, so it was a question of more volume consumed (the so-called "revenge spending"). Half a million hectolitres in a year against a historical average of just over 350.000. For Italian sparkling wines, which reached 1,1 million hectolitres (as compared with the pre-pandemic average of 900.000), the accumulated value in the year 2021 would have only been reached in 2023 *(chart 6)*.

As for still wines, the market closed at 4,8 billion dollars, a record value (+20% in 2020 and +6% in 2019), with volumes returning to the levels of 2017, above 7,4 million hectolitres. (+5%). In this segment as well, the greatest growth was due to the French wines (+16% volume and +44% value, with a return to the levels of 2019), but the figure must also be related to tariffs imposed by the Trump administration. Italy was confirmed as market leader, with growth of +5% in volume (2,6 million hectolitres) and +12% in value (1,6 billion dollars), supported by average prices that exceeded 6,30 dollars/ litre (+7%). Homogeneous growth in value for white and red Italian wines, around +9%, but the performance of white wine is more important (+4% volume) while the red remained stable in physical terms but positioned at +7% in the column of prices ($6,50 / litre). Strong growth also for rosé wines, +31% volume, even if this type of wine is still marginal in the total of the Italian portfolio. A portfolio is made up for two thirds of still wines and 30% for sparkling wines, with the resumption of percentage shares from one category to another (2 points per year), which stopped temporarily in 2020.



7. PROSECCO IMPORTS TO THE UK (% value) TOTAL VALUE £ 206 MILLION

THE UK

The British market presents two completely opposite faces: the contraction dynamic remains on still packaged wines (-2% volume), with a push towards products with lower added value (Spanish and South African, for example) and reductions as regards the big players, such as France, Italy and especially New Zealand, whose volume fell by 25%. Large purchases originate in Belgium and the Netherlands, which today function as logistic platforms for the British large-scale retail trade: together, exports from these two countries add up to 5% of the total volume and value. On the other hand, the importance of sparkling wine, the only real engine of trade in the post Brexit and post Covid era, is much larger: Belgium alone has reached 7% of the total (124.000 hectolitres), while as far as Italian budgets are considered, the amount of Prosecco imported from ports overlooking the North Sea is 11% of the total volume, rising to 15% in terms of value *(chart 7)*. In total, the Italian accounts still remain in surplus: between direct (+8%) and indirect imports, the general balance for 2021/20 rising to +17%. The same argument can be applied to Champagne, with direct imports at +26%, which added to the Belgian package reaches +30% volume/value.

As for bulk wine, which was once one of the strong points of British trade, the negative figure (4,7 million hectoliters) puts the clock back at least five-years: strong passive performance for all the main suppliers, followed by Australia (-17%), USA (-40%), New Zealand and Chile (-25%). The only positive sign is that of South African cheap wines, priced at 66 pence per litre against the general average of one.

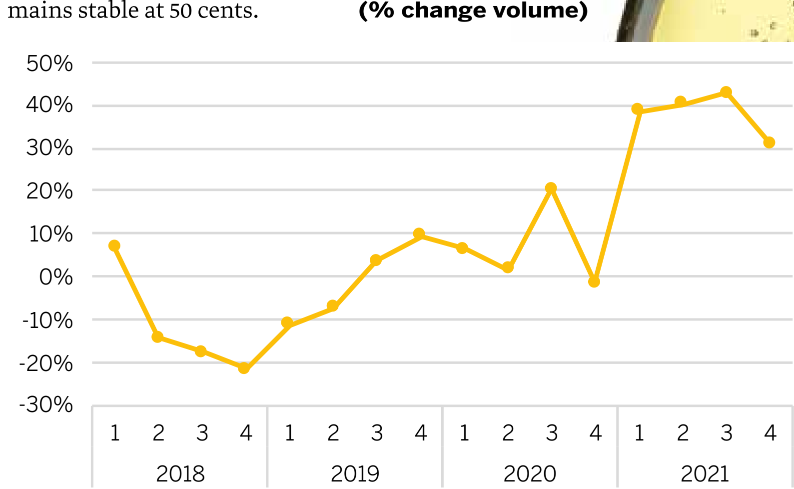
GERMANY

The German market presents dynamics similar to those of the United Kingdom. It saw large purchases of sparkling wine, especially that of Italy (+40%) and France (+15%), and little interest in packaged still wine: Italy at +1%, France at -1% and Spain at -3%. However, a general increase in the price lists should be taken into account, with the market average at +4%, outperformed by Italy (+6%) and especially France (+15%).

As regards sparkling wines, the positive news is that the downward trend divided into trimesters seen at the beginning of this analysis has not yet occurred, except for France (-14 points lost between June and December): for Italy, growth for trimesters remains homogeneous and above all strong, on an average volume of 40% *(graph 8)*.

As for bulk wines, in the face of sharply falling prices (8% on average), the Spaniards always aim at taking away the market from their Italian colleagues. As a result, final prices of the year can be calculated at -20% for Spain (33 euro cents per litre) and +21% in volume (almost 3 million hectolitres), against -6% for Italy, which remains stable at 50 cents.

8. GERMANY: IMPORTS OF ITALIAN SPARKLING WINES BY QUARTER (% change volume)



CHINA

The disappearance of Australian wines from the market (-90% per annum) completely reshuffles the cards. France is back in the lead, with 45% of market value, followed by Chile (20%) and then Italy (10%).

Italy gained 4 percentage points in one year (it was 6% in 2020), closing the year 2021 at 25% volume (320.000 hl), but above all at +44% in value (US $165 million), with the largest average price jump after the French: +15% per year, at US $5,16/ litre against +30% for the French, at 6,58. Among the big names in the market, Italy has the highest average prices, one euro more than the market average.

Looking at details of the products, the performance of sparkling wines is excellent (+34% value), in a market that has also seen an extraordinary recovery of Champagne (+85%), while as regards bottled wine the performance of Italian wine is +44% (142 million dollars) with an average price increase of 20% (US $5,75/litre), almost 2 euros above the Chileans and double the Spanish).

It should be noted that facing a decrease in the Chinese market and a return to growth of that of Hong Kong (+41% value, with a return to pre-pandemic levels), the difference between the two markets was reduced by 73% in one year, for just under $200 million. On the market of the former British colony, French (+30%) and Australian (+80%) direct exporters remain in the lead, while re-exports of French wines from the UK (+35%) and Singapore, which jumped in a year, are still rising, at more than +200%.

BOTTLED WINES

*In these pages are some of the 2021 data for the main wine import and export countries, analysed and commented by the Wine Observatory of the Unione Italiana Vini (**www.wine-observatory.com**), and published by the Quarterly Report "Wine By Numbers."*

*The full report, including all the details on the wine types, is available for free at **winebynumbers.it***

GERMANY

	,000 litres		,000 Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Italy	239.367	1,0	833.754	7,3	3,48	6,2
France	103.477	-0,6	412.421	14,4	3,99	15,0
Spain	76.338	-3,4	195.401	-3,4	2,56	0,0
Austria	28.309	8,0	62.835	8,8	2,22	0,8
USA	11.084	-8,6	48.536	-0,9	4,38	8,4
Portugal	16.239	6,0	48.375	4,1	2,98	-1,8
South Africa	13.496	-7,0	42.854	-2,2	3,18	5,2
Chile	5.547	-19,4	20.599	-8,9	3,71	13,0
Australia	4.634	-32,6	18.024	-25,1	3,89	11,1
Greece	6.630	-20,3	14.378	-22,8	2,17	-3,1
Argentina	2.612	1,7	11.510	16,3	4,41	14,4
New Zealand	1.312	-36,6	8.178	-17,6	6,23	30,1
Hungary	3.967	-9,8	6.085	-8,3	1,53	1,6
Switzerland	168	-5,4	1.872	2,6	11,15	8,4
Croatia	363	-20,0	1.270	-8,2	3,50	14,6
Moldova	554	18,2	1.049	10,0	1,89	-7,0
Turkey	324	-7,1	1.045	7,4	3,23	15,6
Bulgaria	92	2,0	778	0,9	8,45	-1,1
Others	7.400	0,3	18.219	6,1	2,46	5,8
Total	521.911	-1,2	1.747.183	5,8	3,35	3,6

SWITZERLAND

	Litres		Francs		Francs/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Italy	44.958.336	3,2	362.353.303	8,4	8,06	5,1
France	20.243.592	14,5	326.313.998	28,7	16,12	12,4
Spain	16.826.516	0,4	138.594.227	8,0	8,24	7,6
Portugal	8.558.569	3,3	39.210.573	8,4	4,58	5,0
Germany	4.456.035	2,2	37.733.436	7,2	8,47	4,9
USA	2.840.458	21,7	26.862.637	25,5	9,46	3,1
Austria	2.696.097	2,1	21.968.822	13,9	8,15	11,5
Argentina	3.062.280	29,9	14.984.343	20,3	4,89	-7,4
Chile	1.555.537	15,8	8.104.274	11,3	5,21	-3,9
South Africa	905.442	13,1	6.977.461	10,8	7,71	-2,0
Australia	917.886	15,7	6.106.512	33,8	6,65	15,6
New Zealand	193.651	1,2	1.740.323	9,5	8,99	8,1
Others	1.055.902	-5,1	21.512.387	6,5	20,37	12,2
Total	108.270.301	5,9	1.012.462.296	15,0	9,35	8,6

UNITED KINGDOM

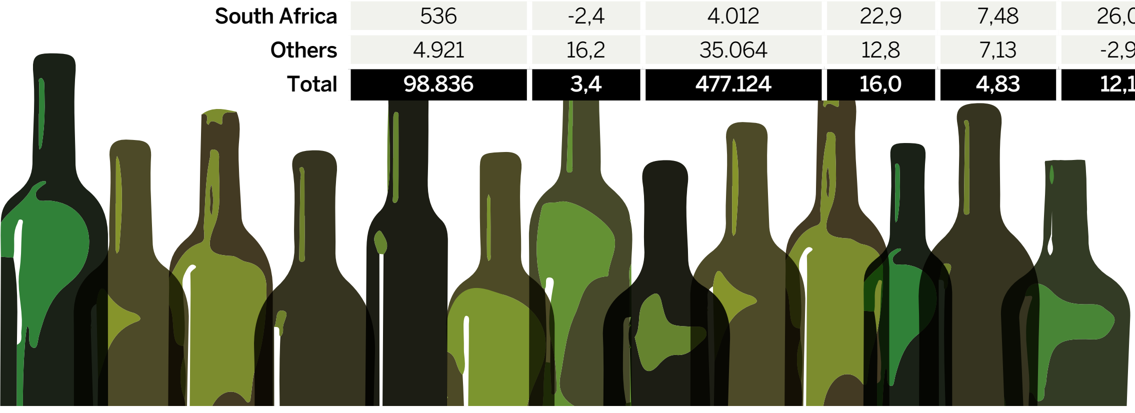
	,000 litres		,000 Pounds		Pounds/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	133.959	-2,9	659.262	3,3	4,92	6,5
Italy	143.728	-10,1	324.861	-0,5	2,26	10,6
Spain	106.660	12,6	212.952	1,5	2,00	-9,9
Chile	53.974	-3,0	146.456	-4,0	2,71	-1,0
New Zealand	29.036	-25,1	131.345	-19,7	4,52	7,2
Australia	35.228	-18,7	105.359	-10,1	2,99	10,5
South Africa	30.897	13,6	88.593	27,8	2,87	12,5
Portugal	23.889	16,6	83.336	23,3	3,49	5,7
Argentina	27.931	6,0	75.860	-0,8	2,72	-6,3
USA	13.737	173,6	63.973	36,3	4,66	-50,2
Belgium	15.602	394,9	62.168	445,3	3,98	10,2
Germany	20.366	-63,2	48.685	-57,3	2,39	16,2
Netherland	20.973	655,4	41.540	278,5	1,98	-49,9
Others	13.718	-12,0	69.753	0,5	5,08	14,2
Total	669.697	-2,4	2.114.143	1,9	3,16	4,5

RUSSIA

	Litres		$		$/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Italy	64.482.322	4,7	209.315.196	2,1	3,25	-2,5
France	27.576.975	-8,4	133.434.590	6,7	4,84	16,5
Spain	49.277.960	-2,4	122.640.128	-2,0	2,49	0,4
Georgia	42.757.201	5,8	119.630.249	-2,5	2,80	-7,8
Portugal	16.477.856	26,8	49.204.399	27,3	2,99	0,4
Chile	14.022.095	-17,1	37.580.749	-18,0	2,68	-1,0
Abkhazia	16.251.529	-14,5	35.411.517	-15,9	2,18	-1,7
New Zealand	5.409.311	4,4	29.291.001	4,3	5,41	-0,1
Germany	8.571.861	24,4	25.376.618	32,8	2,96	6,7
South Africa	8.176.576	22,8	21.868.879	22,9	2,67	0,1
USA	2.603.966	14,2	13.756.913	15,0	5,28	0,8
Australia	3.547.286	12,3	13.596.588	17,0	3,83	4,2
Argentina	4.044.220	6,4	13.296.571	3,2	3,29	-3,0
Moldova	4.578.241	-16,7	7.526.313	-15,6	1,64	1,4
Serbia	3.409.525	-27,0	6.348.774	-18,5	1,86	11,7
Armenia	1.234.707	-26,0	3.789.504	-18,1	3,07	10,6
Azerbaijan	915.955	-21,2	1.995.685	-25,9	2,18	-6,1
Bulgaria	801.187	-43,8	1.335.827	-42,0	1,67	3,2
Others	8.435.372	20,4	24.334.268	17,8	2,88	-2,2
Total	282.574.145	0,6	869.733.769	2,0	3,08	1,4

FRANCE

	,000 litres		,000 Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Portugal	30.507	6,8	95.649	9,2	3,14	2,2
Italy	19.511	17,0	77.297	10,7	3,96	-5,4
USA	928	80,6	73.324	18,3	78,98	-34,5
Spain	28.260	-6,0	39.180	-3,8	1,39	2,3
Chile	1.958	-7,4	34.344	21,4	17,54	31,1
UK	750	-49,9	28.323	12,6	37,74	124,6
Germany	7.125	-6,5	28.249	19,1	3,96	27,3
Switzerland	137	15,7	20.673	61,0	150,55	39,1
Belgium	709	-53,4	15.608	59,9	22,03	242,8
Argentina	1.395	15,3	11.313	32,0	8,11	14,5
New Zealand	920	25,0	8.809	37,2	9,58	9,8
Australia	1.177	646,0	5.279	136,8	4,48	-68,3
South Africa	536	-2,4	4.012	22,9	7,48	26,0
Others	4.921	16,2	35.064	12,8	7,13	-2,9
Total	98.836	3,4	477.124	16,0	4,83	12,1



CANADA

	Litres		$ Canadian		$ Canadian/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
USA	51.949.703	-1,4	564.701.958	7,3	10,87	8,8
France	55.519.922	5,0	555.381.849	14,5	10,00	9,1
Italy	58.773.690	-3,4	488.712.240	5,1	8,32	8,8
Spain	20.872.288	2,4	155.902.654	8,7	7,47	6,2
Australia	21.588.860	-13,2	150.512.383	-12,1	6,97	1,3
New Zealand	11.937.516	-7,9	117.177.377	-7,6	9,82	0,4
Chile	18.167.658	-12,4	94.380.263	-6,8	5,19	6,5
Argentina	12.191.996	-10,1	86.105.214	-4,7	7,06	6,0
Portugal	11.627.279	-4,4	75.240.509	0,9	6,47	5,6
South Africa	5.697.960	-12,5	33.441.404	-8,3	5,87	4,9
Germany	3.302.105	5,7	21.848.405	9,7	6,62	3,8
Others	4.855.067	20,4	40.066.505	26,9	8,25	5,3
Total	276.484.044	-2,9	2.383.470.761	4,9	8,62	8,1

BOTTLED WINES

USA

	,000 litres		,000 $		$/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Italy	256.566	4,9	1.628.626	12,2	6,35	7,0
France	131.649	16,0	1.366.742	43,6	10,38	23,7
New Zealand	61.596	8,1	468.563	12,7	7,61	4,2
Spain	45.877	7,8	276.220	22,5	6,02	13,6
Australia	76.591	-7,5	252.853	-5,5	3,30	2,1
Argentina	50.640	-3,5	245.985	1,3	4,86	5,0
Chile	43.343	-3,5	144.617	-0,3	3,34	3,4
Portugal	25.777	8,9	132.525	18,7	5,14	9,0
Germany	17.214	9,7	80.351	31,4	4,67	19,8
South Africa	9.993	8,4	46.718	9,5	4,67	1,0
Others	21.404	24,5	149.059	50,3	6,96	20,7
Total	740.650	5,3	4.792.259	19,4	6,47	13,4

CHINA

	Litres		$		$/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	100.477.620	13,9	654.962.308	44,0	6,52	26,5
Chile	66.137.446	32,1	267.642.948	41,4	4,05	7,0
Italy	24.649.166	20,2	141.833.440	44,4	5,75	20,1
Spain	48.166.382	39,0	131.744.082	45,6	2,74	4,8
Australia	4.727.848	-94,5	46.443.985	-93,1	9,82	24,5
USA	3.933.947	27,4	34.180.374	79,4	8,69	40,8
South Africa	8.120.050	94,3	30.197.600	105,9	3,72	6,0
Argentina	5.668.669	64,7	28.478.194	76,3	5,02	7,1
New Zealand	2.655.411	30,2	27.228.017	50,4	10,25	15,5
Germany	4.174.031	28,2	25.716.810	33,4	6,16	4,1
Portugal	4.397.920	0,1	17.478.298	2,0	3,97	1,9
Georgia	3.969.765	6,6	13.691.453	-1,0	3,45	-7,2
Moldova	3.260.347	-9,5	8.012.097	-6,5	2,46	3,3
Others	5.162.680	10,7	30.237.428	25,9	5,86	13,7
Total	285.501.282	-8,2	1.457.847.034	-12,0	5,11	-4,1

BRAZIL

	Litres		$		$/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Chile	69.431.569	-4,3	182.080.463	3,3	2,62	8,0
Argentina	26.753.452	18,4	79.383.437	19,8	2,97	1,1
Portugal	24.724.078	9,3	74.009.858	13,9	2,99	4,2
Italy	11.223.274	16,4	39.803.547	22,8	3,55	5,6
France	6.236.730	10,3	31.405.995	26,3	5,04	14,5
Spain	8.759.075	22,2	23.739.010	20,0	2,71	-1,8
Uruguay	3.749.525	-6,8	10.024.169	-0,6	2,67	6,7
USA	506.399	38,1	2.807.493	32,5	5,54	-4,1
South Africa	859.169	37,0	2.508.140	47,4	2,92	7,6
Australia	366.875	72,6	1.383.093	74,6	3,77	1,2
Germany	106.541	-22,2	546.967	8,5	5,13	39,5
New Zealand	21.995	43,1	137.547	53,2	6,25	7,1
Others	349.452	42,7	1.423.390	50,0	4,07	5,1
Total	153.088.134	4,9	449.253.109	12,1	2,93	6,8

HONG KONG

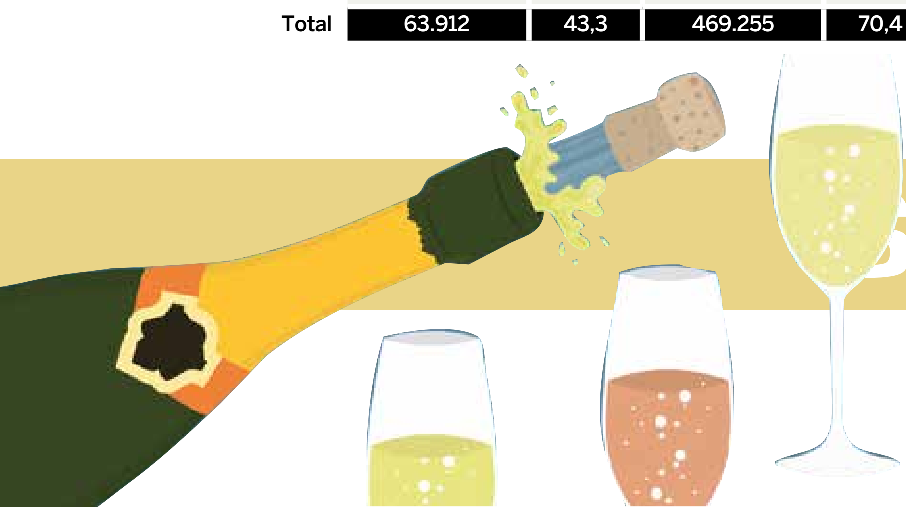
	,000 litres		,000 HKD		HKD/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	8.590	3,3	4.297.755	30,0	500,34	25,9
UK	1.495	10,1	1.441.264	34,6	964,20	22,2
Australia	9.570	18,5	1.111.195	79,1	116,11	51,1
Singapore	2.263	47,8	629.331	234,0	278,05	126,0
USA	2.598	-61,1	605.259	-7,0	232,95	139,4
Italy	2.077	13,8	248.009	37,4	119,40	20,7
China	1.419	103,0	245.493	90,0	173,04	-6,4
Switzerland	42	3,5	135.779	10,5	3211,88	6,8
Germany	587	4,1	116.769	6,6	198,80	2,5
Spain	1.567	14,7	99.444	41,8	63,48	23,6
New Zealand	1.093	14,7	96.194	38,1	88,00	20,3
Chile	1.679	-9,1	65.567	-8,7	39,04	0,5
South Africa	389	66,9	23.279	64,8	59,84	-1,3
Portugal	93	11,0	10.327	119,0	111,52	97,2
Argentina	49	-37,6	3.763	-14,5	76,35	36,9
Others	2.056	12,1	649.252	103,8	315,85	81,9
Total	35.567	0,2	9.778.680	41,1	274,93	40,8

SOUTH KOREA

	,000 litres		,000 $		$/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	11.025	92,1	126.000	105,9	11,43	7,2
USA	6.870	44,0	83.130	57,2	12,10	9,2
Italy	9.507	61,4	77.876	89,8	8,19	17,6
Chile	16.493	14,1	73.466	27,1	4,45	11,3
Spain	8.938	35,1	33.405	62,5	3,74	20,3
Australia	4.720	52,2	29.441	70,7	6,24	12,2
New Zealand	1.883	135,4	15.277	132,5	8,11	-1,2
Argentina	2.041	42,8	11.367	57,6	5,57	10,4
Portugal	892	11,3	7197	69,4	8,07	52,1
Germany	604	50,7	4.017	75,9	6,66	16,7
South Africa	300	55,7	1.610	75,2	5,37	12,6
Others	639	59,7	6.469	90,3	10,13	19,2
Total	63.912	43,3	469.255	70,4	7,34	18,9

JAPAN

	,000 litres		,000 Yen		Yen/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	45.005	-0,6	50.828.050	14,9	1.129,38	15,6
Italy	28.169	-0,8	17.127.365	12,7	608,02	13,7
Chile	40.379	-17,8	12.688.197	-15,8	314,23	2,3
USA	6.412	0,3	11.341.372	-5,0	1.768,66	-5,3
Spain	19.659	4,0	6.456.620	12,5	328,43	8,1
Australia	5.825	-3,4	2.782.965	4,3	477,73	8,1
Germany	3.183	17,1	1.837.515	23,3	577,22	5,3
New Zealand	1.117	-7,8	1.195.039	5,9	1.070,00	14,9
South Africa	1.655	7,6	918.967	9,2	555,28	1,5
Portugal	1.816	13,7	883.683	16,0	486,59	2,1
Argentina	1.478	-11,7	839.565	-2,7	568,18	10,2
Others	1.953	16,7	1.584.605	25,3	811,25	7,4
Total	156.652	-4,8	108.483.943	7,2	692,52	12,6



SPARKLING WINES

UNITED KINGDOM

	,000 litres		,000 Pounds		Pounds/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	28.572	25,5	350.162	20,7	12,26	-3,8
Italy	105.888	7,7	253.907	3,6	2,40	-3,8
Belgium	12.429	1361,9	54.379	1529,7	4,38	11,5
Spain	14.774	3,0	30.592	14,8	2,07	11,5
Germany	2.745	131,1	6.861	54,7	2,50	-33,0
South Africa	631	30,6	3.803	42,1	6,03	8,8
Australia	888	4,9	3.548	25,7	4,00	19,8
USA	207	-46,6	1.965	-1,9	9,51	83,5
New Zealand	176	-26,4	971	-16,3	5,51	13,7
Others	1.425	119,3	12.262	60,1	8,60	-27,0
Total	167.735	19,7	718.451	22,6	4,28	2,4

GERMANY

	,000 litres		,000 Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	23.999	14,5	284.756	20,0	11,87	4,8
Italy	28.712	37,7	109.811	30,4	3,82	-5,3
Spain	18.591	-1,1	42.388	-6,1	2,28	-5,1
Austria	330	9,6	2.908	-13,6	8,81	-21,1
Ukraine	421	31,8	2.405	131,5	5,71	75,7
South Africa	85	-0,9	625	0,3	7,35	1,3
Others	555	30,7	2.609	45,9	4,70	11,7
Total	72.693	17,7	445.502	19,3	6,13	1,3

SPARKLING WINES

RUSSIA

	Litres		$		$/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Italy	39.580.688	23,9	165.115.808	24,6	4,17	0,5
France	9.910.942	48,5	81.742.865	32,9	8,25	-10,5
Spain	6.260.952	10,4	21.377.618	11,1	3,41	0,7
Moldova	2.586.858	246,7	5.877.470	236,9	2,27	-2,8
Abkhazia	1.019.365	8,0	2.647.625	67,7	2,60	55,2
Germany	178.134	33,6	1.029.051	50,1	5,78	12,4
Georgia	179.712	104,6	521.343	96,8	2,90	-3,8
Others	559.433	-16,3	2.867.869	-4,1	5,13	14,6
Total	60.276.084	28,6	281.179.649	27,5	4,66	-0,9

SWITZERLAND

	Litres		Francs		Francs/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	5.578.820	21,4	141.030.060	32,3	25,28	9,0
Italy	14.305.694	14,3	74.245.501	14,4	5,19	0,0
Spain	2.188.166	-8,2	9.512.480	9,8	4,35	19,6
Germany	1.202.934	9,0	4.698.816	9,1	3,91	0,1
Austria	98.341	-5,5	974.600	2,9	9,91	8,8
Others	178.472	17,2	2.828.556	21,6	15,85	3,8
Total	23.552.427	13,0	233.290.013	24,2	9,91	10,0

CANADA

	Litres		$ canadian		$ canadian/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	4.678.940	37,6	146.007.947	50,9	31,21	9,7
Italy	10.282.274	22,3	92.148.111	24,3	8,96	1,6
Spain	2.576.239	8,0	19.958.003	12,0	7,75	3,7
USA	710.774	15,9	10.809.404	25,3	15,21	8,1
Germany	1.255.102	25,3	8.919.853	26,1	7,11	0,6
Australia	790.252	-1,2	5.005.217	0,2	6,33	1,3
Hungary	373.759	-23,2	2.062.661	-21,7	5,52	1,8
Others	507.622	-7,8	5.052.175	-7,3	9,95	0,6
Total	21.174.962	20,0	289.963.371	33,3	13,69	11,1

USA

	,000 litres		,000 $		$/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	52.354	51,6	1.093.482	55,0	20,89	2,3
Italy	113.771	30,5	601.742	33,3	5,29	2,1
Spain	25.925	44,4	122.394	48,3	4,72	2,7
Germany	1.013	14,9	4.046	14,1	4,00	-0,7
Australia	353	-4,5	2.033	7,6	5,76	12,7
Others	4.071	62,8	19.262	55,0	4,73	-4,8
Total	197.486	37,7	1.842.959	46,6	9,33	6,5

CHINA

	Litres		$		$/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	698.278	81,7	18.548.353	104,6	26,56	12,6
Italy	1.540.962	61,1	5.049.411	44,7	3,28	-10,2
Spain	367.619	-21,1	1.101.531	7,8	3,00	36,5
Australia	150.033	-26,6	647.183	-25,1	4,31	2,0
Germany	93.525	-36,4	341.294	-22,0	3,65	22,5
South Africa	43.246	519,4	122.591	398,4	2,83	-19,5
Chile	4.948	29,5	28.623	40,2	5,78	8,3
Others	72.268	-7,7	309.187	15,4	4,28	25,0
Total	2.970.879	32,2	26.148.173	72,1	8,80	30,2

JAPAN

	,000 litres		,000 Yen		Yen/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
France	2.806	-6,2	12.856.496	4,2	4.581,69	11,1
Spain	2.287	-1,0	1.012.767	1,0	442,89	1,9
Italy	1.548	0,6	875.095	-3,6	565,49	-4,2
Australia	309	-22,3	197.092	-9,0	637,95	17,1
Chile	369	5,1	158.150	-1,9	429,05	-6,7
USA	14	-77,2	37.267	-64,8	2.674,54	54,7
South Africa	23	67,7	10.662	-4,1	472,84	-42,8
Others	141	29,6	96.555	16,1	682,51	-10,4
Total	7.496	-3,5	15.244.084	2,8	2.033,69	6,6

BULK WINE

GERMANY

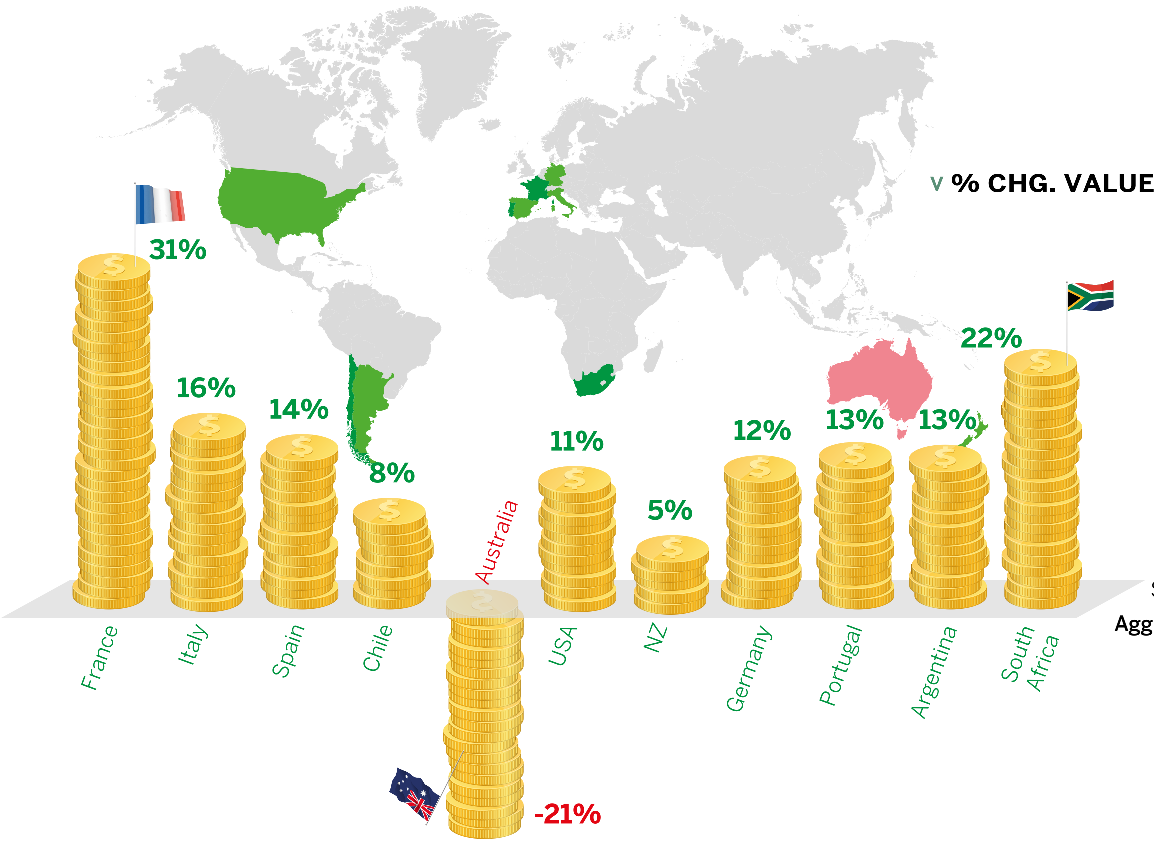
	,000 litres		,000 Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Italy	235.296	-5,8	121.256	-7,8	0,52	-2,1
Spain	292.134	21,3	96.990	-3,2	0,33	-20,1
France	67.575	-13,1	60.207	-7,3	0,89	6,7
South Africa	54.528	-0,1	34.423	-2,9	0,63	-2,8
Australia	35.470	11,1	32.230	13,3	0,91	1,9
USA	25.511	-27,9	29.176	-19,4	1,14	11,8
New Zealand	9.416	-22,0	23.306	-18,4	2,48	4,7
Chile	27.073	-26,3	20.449	-28,1	0,76	-2,4
Macedonia	17.527	-0,7	8.479	-8,0	0,48	-7,4
Hungary	9.395	-36,9	7.085	-31,3	0,75	8,9
Austria	7.854	-9,9	6.033	12,8	0,77	25,2
Argentina	3.761	-2,2	2.474	-13,9	0,66	-11,9
Portugal	1.632	9,8	1.343	13,2	0,82	3,1
Romania	1.255	52,6	1.095	58,0	0,87	3,6
Greece	627	-0,3	526	-35,4	0,84	-35,2
Others	1.156	-81,9	1.624	-59,2	1,41	125,0
Total	790.209	-0,4	446.696	-8,5	0,57	-8,1

FRANCE

	,000 litres		,000 Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Spain	353.704	-7,6	115.967	-21,4	0,33	-14,9
Italy	32.943	-15,7	19.232	-17,8	0,58	-2,4
USA	4.608	25,8	6.880	20,4	1,49	-4,3
Australia	6.613	2,1	6.499	8,0	0,98	5,8
Chile	7.063	-4,0	5.663	-2,7	0,80	1,4
South Africa	9.549	20,1	5.503	16,8	0,58	-2,7
Portugal	3.031	-11,6	2.914	-13,6	0,96	-2,3
Greece	1.936	-46,1	2.807	-44,7	1,45	2,7
Morocco	1.607	-48,5	1.929	-47,4	1,20	2,2
Argentina	1.217	-50,8	1.140	-44,5	0,94	12,8
Others	19.267	-24,0	25.002	-20,2	1,30	4,9
Total	441.540	-9,0	193.535	-18,9	0,44	-10,8

UNITED KINGDOM

	,000 litres		,000 Pounds		Pounds/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
Australia	170.055	-17,3	145.922	-12,8	0,86	5,4
USA	77.327	-39,6	111.372	-36,2	1,44	5,7
New Zealand	37.762	-24,8	83.305	-20,6	2,21	5,7
Chile	55.963	-24,3	43.449	-25,2	0,78	-1,1
South Africa	57.058	14,2	37.579	18,4	0,66	3,7
Argentina	27.076	5,8	26.776	-1,2	0,99	-6,6
Italy	17.337	17,9	17.251	34,3	1,00	13,9
Spain	12.856	-11,4	7.355	-17,1	0,57	-6,5
France	1.994	-42,0	4.038	-65,6	2,03	-40,7
Germany	357	-18,7	464	-24,6	1,30	-7,2
Others	9.029	18,1	7.865	26,4	0,87	7,0
Total	466.814	-18,7	485.377	-19,6	1,04	-1,1



WINE EXPORT BY COUNTRY - 2021

	,000 litres			,000 US$			US$/litre	
	2021	% Chg.	Share %	2021	% Chg.	Share %	2021	Chg. %
France	1,515,295	7%	15%	13,105,857	31%	37%	8.65	23%
Italy	2,220,180	7%	22%	8,412,601	16%	24%	3.79	8%
Spain	2,389,472	14%	23%	3,477,671	14%	10%	1.46	0%
Chile	1,187,789	2%	12%	1,968,700	8%	6%	1.66	6%
Australia	673,845	-15%	7%	1,694,406	-21%	5%	2.51	-7%
USA	328,281	-9%	3%	1,454,881	11%	4%	4.43	21%
NZ	393,682	-6%	4%	1,370,601	5%	4%	3.48	12%
Germany	366,688	0%	4%	1,172,709	12%	3%	3.20	12%
Portugal	328,461	5%	3%	1,095,145	13%	3%	3.33	8%
Argentina	325,094	-15%	3%	890,488	13%	3%	2.74	33%
South Africa	480,042	32%	5%	751,524	22%	2%	1.57	-8%
Aggregate total	10,208,829	5%	100%	35,394,582	17%	100%	3.47	12%

THE BALANCE SHEET OF THE TOP EXPORTERS IN 2021

CRAZY NUMBERS 35 BILLION DOLLARS and 100 MILLION HECTOLITRES

Thanks to the restart of on-trade sales, premium and luxury wines boomed after being strongly penalized in 2020. Countries from the old continent, especially France, are doing better and bubbles, mostly Champagne and Prosecco, had extraordinary results

By **CARLO FLAMINI**
Wine Observatory

In 2021, the main wine exporting countries scored record numbers. The total volume leaped over 100 million hectolitres, an increase of 5% compared to 2020, for a value that exceeded 35 billion US dollars, equivalent to a growth of 17%. The average prices of exported products also increased, just under $3,50 per litre (+12%), thanks to the extraordinary recovery of Champagne and French wines in general, which grew in value by 30%, over 13 billion of US dollars. Excellent performances also for Italy and Spain, respectively second and third in the world ranking by value (Spain is first in volume, 23% of total, with nearly 24 million hectolitres exported, +14%).

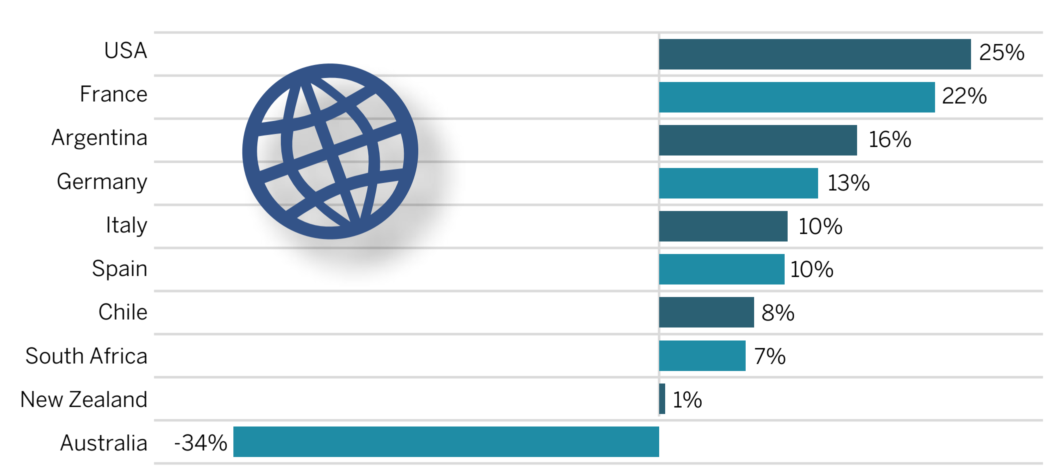
On the other hand, countries of the New World had some difficulties, in particular Australia (-15% volume), due to the well-known trade problems suffered with China, but also USA and New Zealand, while Chile is relatively stable, in fourth position for export volumes and values. Exports of Argentine wine, in particular bulk wine, fell sharply, even if the general balance in terms of value marks scored +13%, thanks to a strong increase in the general price.

The year 2021 was extraordinary from all points of view: widespread phenomena of revenge spending allowed premium and ultra-premium wines to re-emerge, after suffering from the closures of the catering sector in 2020 due to the Covid-19 pandemic.

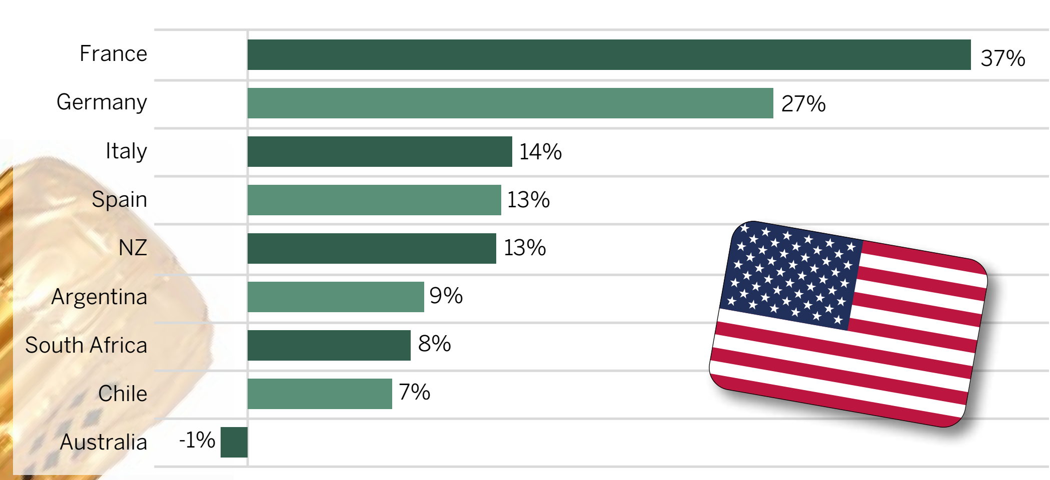
This explains the substantial performances – regarding still wines in bottles – collected by all the major suppliers, except for Australia and New Zealand, who suffered a troubled year on three of the main markets, the UK, Australia and Canada. In France, extraordinary exploits for the great red wines of Burgundy and Bordeaux, all over +30% in value, but also for the second lines and the IGP-Vin de Pays. In the United States, the value of Bordeaux wines has risen up to 68%, as well as those from Burgundy that reached almost 18 euros per litre, with an annual variation on the value of +45%. Performance of over 30% in China for Bordeaux wines, while Burgundy almost doubled the supplies.

On the American market *(chart 2)*, behind France, the best numbers are performed by European wines, all in double digits, while those of the New World are slightly behind, with the exception of New Zealand, which is in line with Italian and Spanish (+13%). The Australian wines are in decline, still struggling to find compensation for the refusal on the Chinese market: even in the UK the balances are negative *(chart 3)*, as well as for their New Zealand cousins, who

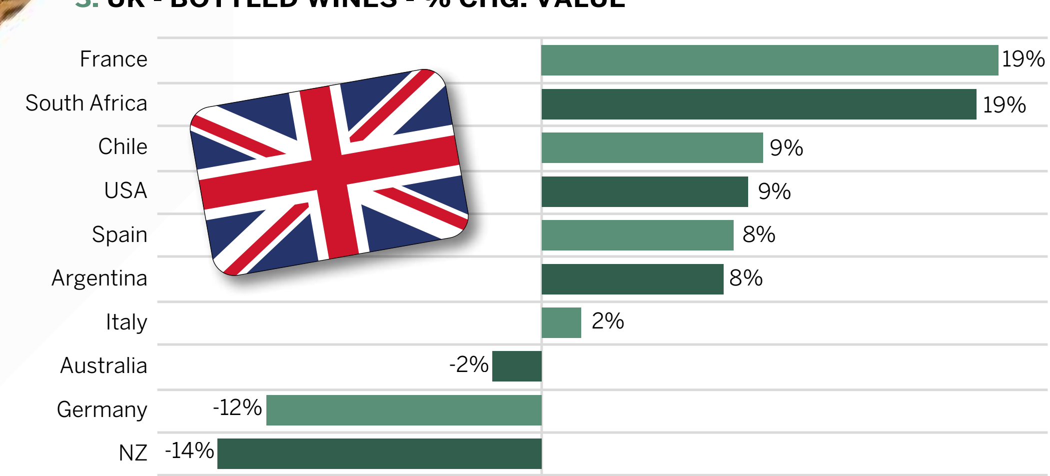
1. BOTTLED WINES - TOTAL EXPORT - % CHG. VALUE



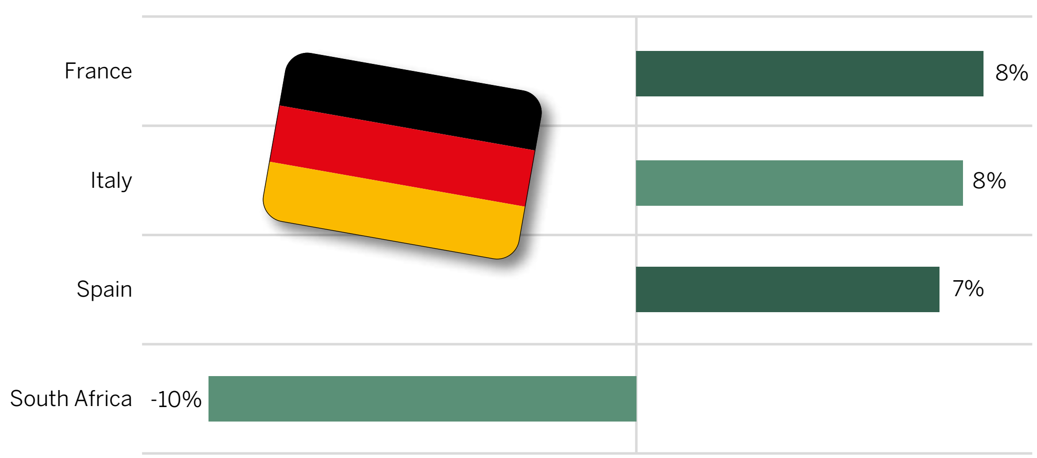
2. US - BOTTLED WINES - % CHG. VALUE



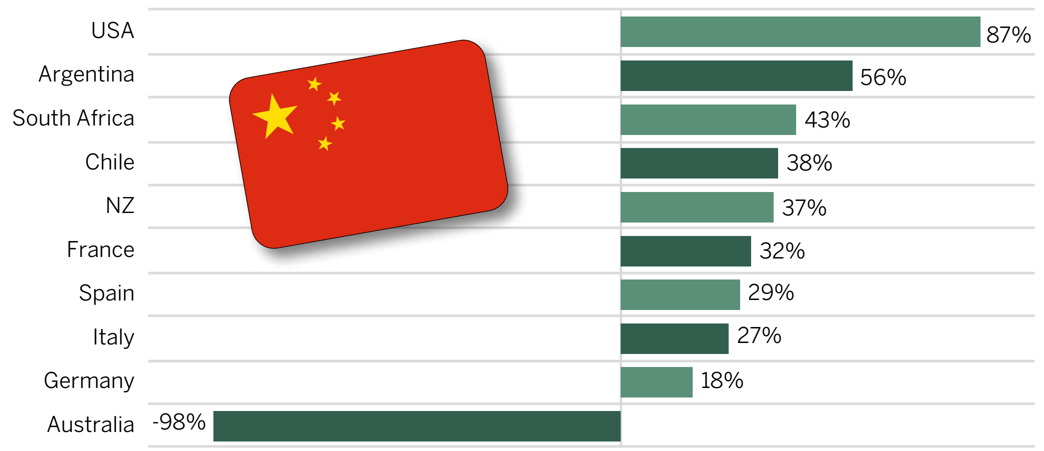
3. UK - BOTTLED WINES - % CHG. VALUE



4. GERMANY - BOTTLED WINES - % CHG. VALUE



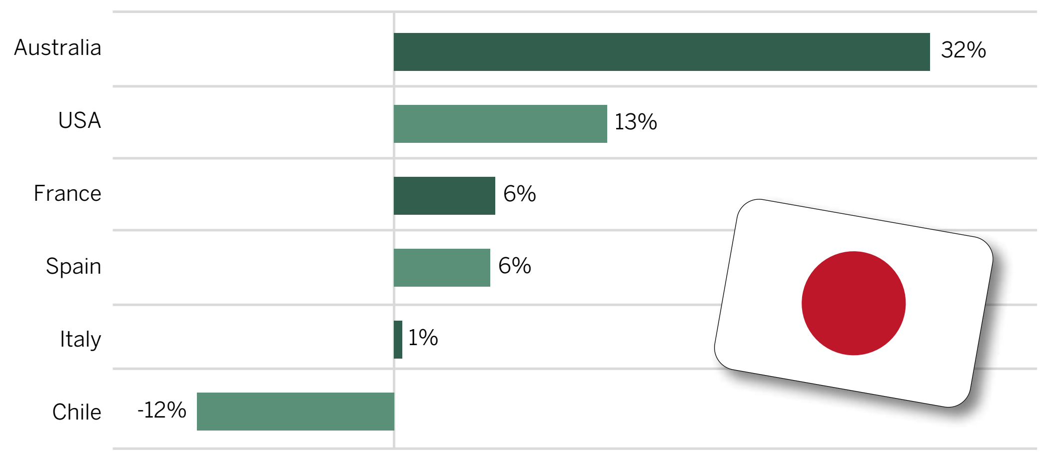
5. CHINA - BOTTLED WINES - % CHG. VALUE



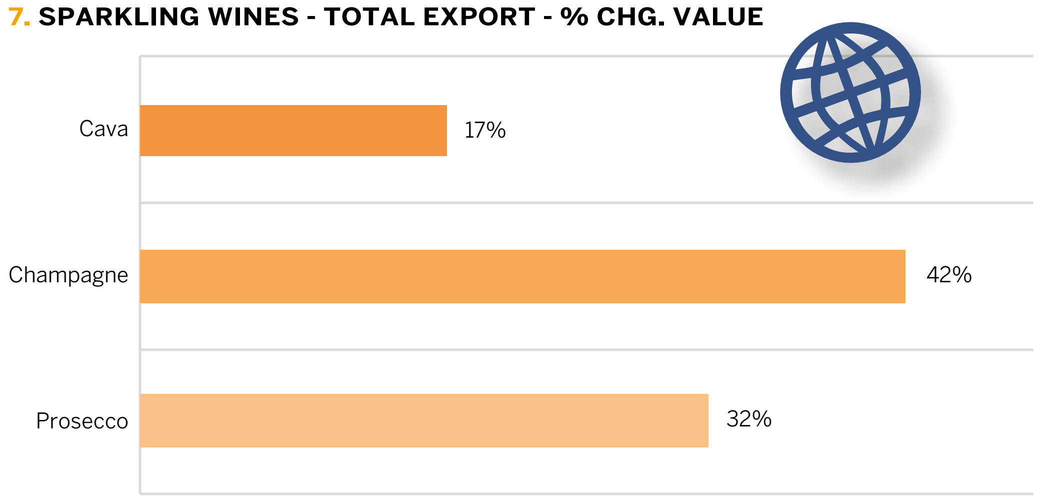
ended up as the market's worst performers. A market dominated by French wines (with Bordeaux at +33% and Burgundy at +24%) and by South African cheap wines. The rest of the countries, with the exception of Italy and Argentina, which do not grow, have increased between 8 and 9%. The German market *(chart 4)* also gives great satisfaction to the big European players, all between a +7% and +8% increase, while strong regressions for the South Africans can be registered.

On the Asian continent, apart from the Australians, which have practically disappeared from the Chinese market *(chart 5)*, the best performers are US wines, followed by Argentines, South Africans, Chileans and New Zealanders. The big players, France, Spain and Italy, are also on the rise. Finally, in Japan *(chart 6)*, we find one of the few positive signs of Australian wine (+32%), with lower growth rates for Americans, French and Spanish, stable Italy and Chileans in a strong identity crisis (-12%).

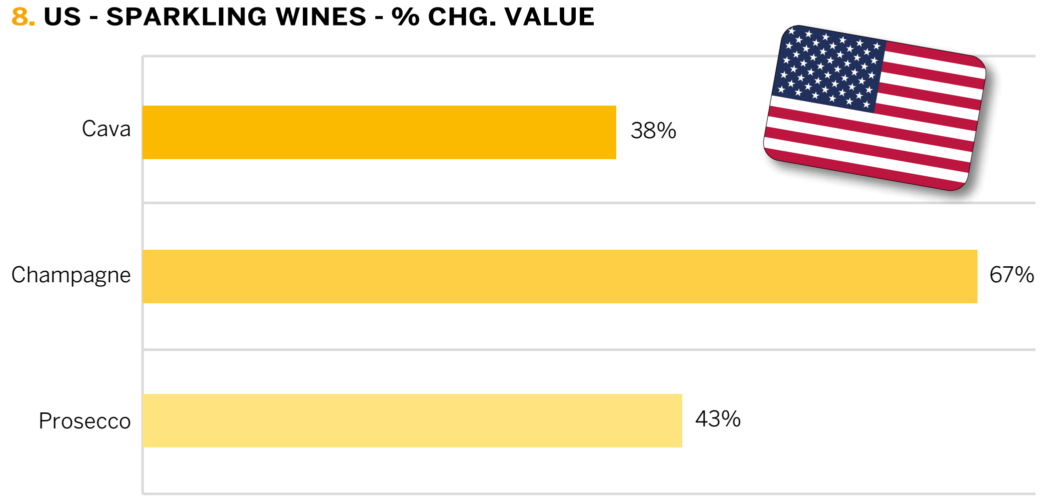
6. JAPAN - BOTTLED WINES - % CHG. VALUE



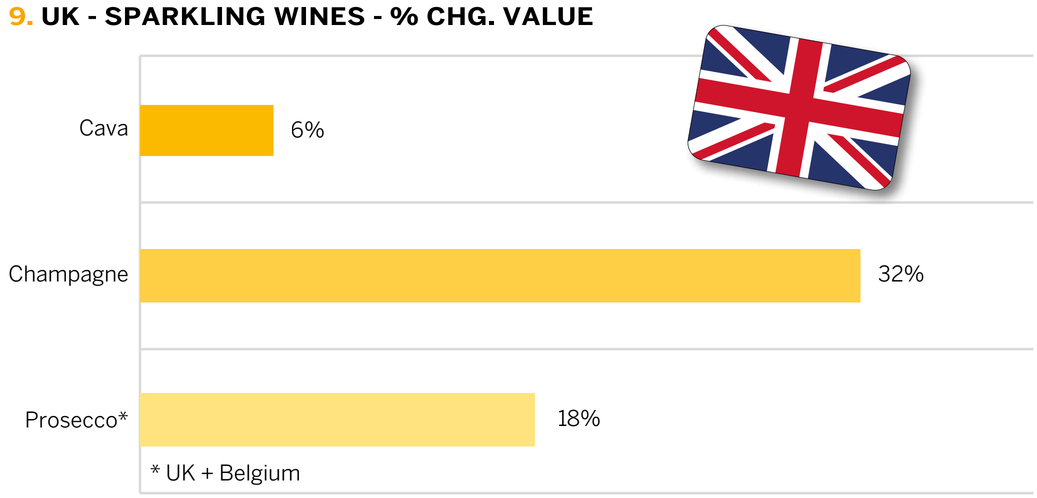
7. SPARKLING WINES - TOTAL EXPORT - % CHG. VALUE



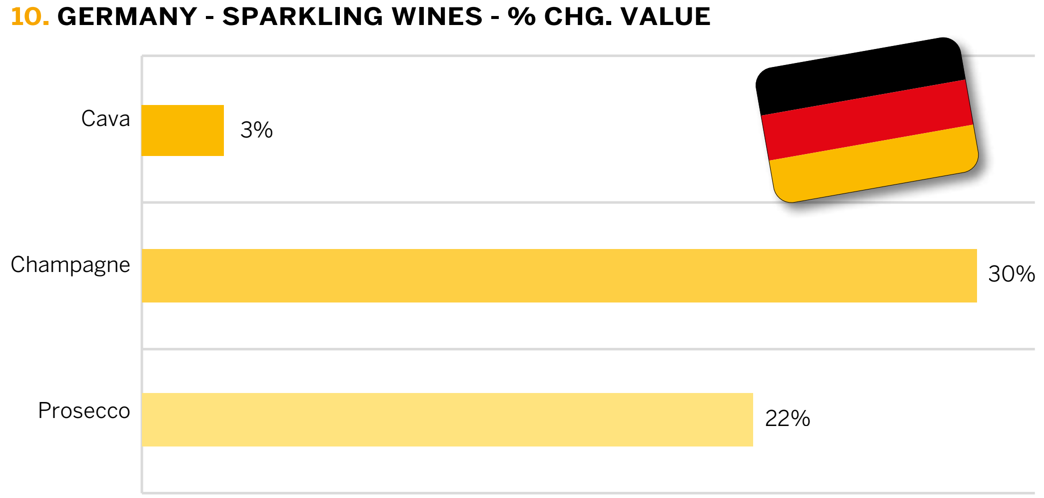
8. US - SPARKLING WINES - % CHG. VALUE



9. UK - SPARKLING WINES - % CHG. VALUE



10. GERMANY - SPARKLING WINES - % CHG. VALUE

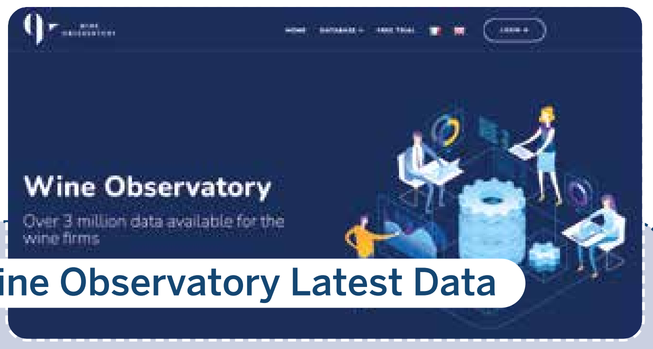


SPARKLING WINES: FULL CHAMPAGNE

As for sparkling wine, the world demand was very strong especially for Champagne, a product that had felt the strong impact of the crisis triggered by Covid: total exports at +42%, exactly 10 points above Prosecco *(chart 7)*, which is outclassed in performance value also on the US market (+67% versus +43%, *chart 8*). The gap on the British market is closer *(chart 9)*, but it must be said that the +18% achieved by Prosecco is cumulative with the exports to Belgium, which has become a logistics hub to London.

In Germany, 8 points separate French sparkling wines from Italians, while in the back there are only the Cava wines *(chart 10)*, which have the lowest growth performance.

WINE OBSERVATORY



Stay Informed With The Wine Observatory Latest Data

The data and analyses presented in these pages are provided by the Wine Observatory of the Unione Italiana Vini. At the address www.wine-observatory.com the detailed data of the exports from the main wine producing countries to the world (Italy, France, Spain, Germany, Portugal, USA, Argentina, Chile, Australia, New Zealand, South Africa) can be consulted. The import platform has data from over 80 countries, from the largest importers to the smallest ones, divided into the categories of sparkling wine, still packaged wines, bag-in-box and bulk wines. The database allows for queries at various levels of depth to check the values in the main international currencies, to build datasets and to elaborate dynamic graphs, as well as the possibility of downloading data in Excel format. The platform, entirely in English, can be accessed through the free-trial function, which allows one to query the entire database for 48 hours.

PERFORMANCES BY SUPPLIER

Italy

Sparkling Wines

	Litres		Euro		Euro/litres	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
USA	116.317.355	33,7	460.487.092	33,3	3,96	-0,2
UK	108.059.243	4,8	341.138.912	7,3	3,16	2,3
Germany	31.364.747	-6,6	128.980.088	12,6	4,11	20,6
France	24.125.044	24,3	84.418.376	22,7	3,50	-1,3
Belgium	23.639.428	68,4	74.252.257	61,3	3,14	-4,2
Russia	23.958.669	29,8	71.378.547	26,5	2,98	-2,5
Switzerland	14.433.886	11,4	68.890.665	10,7	4,77	-0,7
Sweden	15.435.339	31,5	60.911.116	33,4	3,95	1,4
Canada	10.171.487	20,2	50.193.669	23,4	4,93	2,6
Austria	9.120.844	21,6	39.037.616	22,0	4,28	0,3
Japan	8.378.087	13,7	36.086.995	4,7	4,31	-7,9
Poland	10.144.721	24,6	35.988.281	26,8	3,55	1,8
Netherlands	6.341.866	60,6	26.538.714	30,5	4,18	-18,7
Ukraine	6.676.909	71,0	22.730.794	59,2	3,40	-6,9
Norway	4.028.492	3,1	18.193.746	4,2	4,52	1,1
China	5.013.214	14,5	17.472.854	33,5	3,49	16,5
Spain	5.230.999	-22,3	15.412.348	34,3	2,95	72,8
Finland	3.591.205	39,7	15.030.406	38,1	4,19	-1,2
Czech R.	3.837.600	34,9	13.681.968	36,8	3,57	1,4
Denmark	3.022.394	3,9	11.663.666	5,2	3,86	1,2
South Korea	2.050.784	100,2	9.009.855	120,3	4,39	10,0
Hong Kong	1.087.445	47,0	5.237.645	39,7	4,82	-5,0
Ireland	1.346.222	28,5	5.090.682	32,4	3,78	3,0
Brazil	1.272.600	0,8	3.495.444	0,6	2,75	-0,2
Others	56.333.716	37,1	207.131.638	31,9	3,68	-3,8
Total	**494.982.296**	**21,3**	**1.822.453.374**	**23,7**	**3,68**	**2,0**

Bottled Still Wines

	Litres		Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
USA	227.829.320	13,0	1.081.664.060	15,8	4,75	2,6
Germany	231.398.987	8,5	768.980.078	9,2	3,32	0,7
UK	132.216.624	-2,4	352.202.679	3,6	2,66	6,1
Canada	61.442.580	2,6	310.432.817	9,3	5,05	6,6
Switzerland	43.935.271	7,0	298.540.323	9,2	6,80	2,1
Netherlands	50.634.668	22,1	179.748.174	17,5	3,55	-3,8
Denmark	28.396.677	3,2	124.305.317	0,2	4,38	-2,9
Belgium	33.383.951	3,4	111.961.327	6,4	3,35	2,9
Japan	24.074.905	-6,8	103.369.712	-0,7	4,29	6,5
France	18.979.675	-5,9	101.387.766	18,3	5,34	25,7
Sweden	19.814.710	-7,6	97.343.511	-1,9	4,91	6,2
China	20.496.733	22,6	89.612.458	27,1	4,37	3,7
Norway	12.332.465	-14,2	70.587.840	-5,0	5,72	10,7
Russia	26.070.819	9,5	65.754.507	13,0	2,52	3,2
South Korea	9.485.912	63,6	59.070.529	70,8	6,23	4,4
Austria	13.950.638	-6,5	47.361.017	-2,6	3,39	4,2
Poland	14.536.263	14,7	40.735.683	14,7	2,80	0,0
Finland	6.084.571	-3,5	27.721.211	0,3	4,56	4,0
Brazil	7.589.197	3,9	25.563.089	7,6	3,37	3,5
Ireland	7.820.792	-1,2	22.179.949	4,5	2,84	5,9
Czech R.	6.786.111	-0,1	20.021.454	-5,8	2,95	-5,8
Hong Kong	1.910.484	31,3	18.839.400	20,3	9,86	-8,4
Spain	2.771.711	35,1	14.795.036	16,4	5,34	-13,9
Mexico	2.710.144	19,2	8.404.974	33,5	3,10	12,0
Others	65.544.234	14,4	277.625.405	19,6	4,24	4,5
Total	**1.070.197.442**	**7,0**	**4.318.208.316**	**11,0**	**4,03**	**3,7**

France

Burgundy

	Thousand litres		Thousand Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
USA	13,810	30.0	242,541	45.4	17.56	11.9
UK	12,100	2.9	199,076	24.4	16.45	20.9
Japan	5,745	10.7	118,286	8.3	20.59	-2.2
Hong Kong	1,113	29.7	86,936	30.0	78.08	0.3
Canada	6,622	13.6	70,229	19.7	10.61	5.3
Switzerland	1,404	11.7	61,524	10.9	43.82	-0.7
China	2,148	76.9	54,848	91.1	25.53	8.0
Belgium	5,422	21.0	49,029	20.8	9.04	-0.2
Denmark	2,350	28.2	39,170	27.3	16.67	-0.7
Taiwan	711	37.1	35,229	21.2	49.53	-11.6

Champagne

	Thousand litres		Thousand Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
USA	25,633	67.6	740,455	66.8	28.89	-0.5
UK	19,786	22.4	454,255	31.9	22.96	7.8
Singapore	9,453	28.1	303,487	38.4	32.11	8.0
Germany	9,432	25.1	213,356	30.8	22.62	4.6
Italy	6,712	34.0	203,904	43.0	30.38	6.8
Japan	5,046	19.8	183,245	24.5	36.32	3.9
Belgium	7,858	20.0	176,316	26.9	22.44	5.8
Switzerland	4,558	24.9	123,553	32.1	27.11	5.8
Australia	5,457	19.5	118,787	31.6	21.77	10.1
Spain	3,738	58.5	105,586	71.0	28.25	7.9
Netherlands	3,414	30.0	98,465	48.4	28.84	14.2
Canada	2,392	46.9	77,537	47.9	32.41	0.6
Sweden	2,963	20.8	68,906	26.3	23.25	4.6
Hong Kong	964	8.8	41,249	28.9	42.81	18.6
Denmark	1,401	42.4	38,312	40.5	27.35	-1.4
South Korea	1,153	39.6	38,127	46.0	33.06	4.6
Austria	1,314	33.4	36,630	36.0	27.87	1.9
China	888	66.7	35,535	75.0	40.01	5.0
United Arab E.	812	48.3	31,130	57.4	38.32	6.2
South Africa	851	63.7	26,397	67.8	31.01	2.5

Bordeaux

	Thousand litres		Thousand Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
USA	24,111	24.7	345,100	68.3	14.31	35.0
Hong Kong	5,658	2.9	294,081	0.2	51.98	-2.6
China	33,169	10.7	291,391	33.0	8.79	20.1
UK	15,201	-18.8	272,283	33.2	17.91	64.1
Switzerland	4,657	15.0	151,601	37.9	32.55	19.9
Belgium	16,027	4.0	120,477	17.8	7.52	13.3
Japan	16,391	5.5	119,213	10.2	7.27	4.4
Germany	13,614	5.8	113,037	24.1	8.30	17.3
Canada	6,634	5.8	65,274	18.6	9.84	12.1
Singapore	1,344	3.1	40,834	29.6	30.39	25.7

Spain

Bottled Still Wines

	Litres		Euro		Euro/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
UK	99,538,275	-7.8	288,251,160	8.2	2.90	17.3
USA	46,085,888	6.7	231,841,266	13.0	5.03	5.9
Germany	97,563,597	11.0	204,999,621	7.2	2.10	-3.4
Switzerland	15,594,683	0.7	120,209,231	10.0	7.71	9.2
China	47,431,230	24.8	101,698,123	29.2	2.14	3.5
Canada	20,897,380	-0.2	98,665,006	6.2	4.72	6.4
Netherlands	39,642,881	-15.8	97,244,299	-11.6	2.45	4.9
France	47,211,561	-0.8	56,177,815	5.9	1.19	6.7
Mexico	14,242,939	23.1	52,104,139	21.5	3.66	-1.3
Belgium	12,927,765	9.7	43,442,285	21.7	3.36	11.0
Japan	19,284,576	2.7	42,910,039	5.9	2.23	3.1
Portugal	92,929,431	20.3	41,018,580	7.9	0.44	-10.3
Denmark	13,027,636	19.6	35,753,325	16.9	2.74	-2.3
Sweden	8,861,754	1.4	32,811,880	-1.5	3.70	-2.9
Ireland	9,779,362	6.9	30,753,595	-1.4	3.14	-7.8
South Korea	8,208,203	5.5	25,132,762	28.9	3.06	22.2
Norway	3,665,762	-0.6	20,570,797	1.8	5.61	2.3
Poland	10,488,402	21.4	20,460,496	18.3	1.95	-2.5
Brazil	7,974,678	6.1	17,959,654	5.9	2.25	-0.2
Russia	11,302,410	12.0	16,031,005	10.5	1.42	-1.3
Italy	23,438,529	76.6	12,694,640	54.0	0.54	-12.8
Hong Kong	2,227,245	8.3	12,121,545	20.6	5.44	11.4
Czech. R.	9,365,898	-1.5	10,597,908	-1.9	1.13	-0.4
Finland	3,559,041	0.3	10,178,501	6.9	2.86	6.6
Ukraine	4,682,237	-7.6	9,283,583	-7.5	1.98	0.1
Austria	1,819,645	6.0	6,702,278	-3.4	3.68	-8.9
Others	112,422,947	14.0	223,453,362	17.6	1.99	3.2
Totale	**784,173,957**	**7.7**	**1,863,066,893**	**10.0**	**2.38**	**2.1**

Australia

Bottled Still Wines

	,000 litres		,000 AUD		AUD/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
USA	87,778	-0.3	366,889	-1.3	4.18	-1.0
UK	43,199	-10.4	215,034	-2.1	4.98	9.3
Hong Kong	8,204	5.2	198,051	28.4	24.14	22.1
Singapore	7,183	5.2	162,863	89.4	22.67	80.0
Canada	23,727	-13.0	128,664	-19.0	5.42	-6.8
New Zealand	18,744	7.1	85,063	3.9	4.54	-2.9
South Korea	5,489	72.9	47,806	89.1	8.71	9.4
Japan	6,988	22.0	39,678	32.4	5.68	8.6
Netherlands	7,489	-13.9	38,682	3.5	5.17	20.2
Malaysia	2,504	-14.3	36,056	-19.8	14.40	-6.4
Taiwan	3,085	42.3	30,605	70.8	9.92	20.0
Thailand	2,562	6.2	26,658	37.4	10.41	29.4
Sweden	4,424	-5.8	25,136	-1.0	5.68	5.1
China	3,239	-96.0	19,334	-97.9	5.97	-48.3
Denmark	3,168	-41.1	17,226	-2.6	5.44	65.3
United AE	2,856	59.7	15,780	33.5	5.53	-16.4
Ireland	3,138	-15.7	14,040	-5.3	4.47	12.4
Germany	1,759	-29.3	11,378	-9.9	6.47	27.4
Others	20,966	15.3	132,547	-21.0	6.32	-31.4
Total	**256,502**	**-24.0**	**1,611,490**	**-33.6**	**6.28**	**-12.6**

Chile

Bottled Still Wines

	,000 litres		,000 $		$/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
China	65,311	31.5	255,840	38.2	3.92	5.1
Brazil	69,396	-7.4	183,032	-0.4	2.64	7.6
UK	53,840	0.8	166,516	9.4	3.09	8.5
USA	47,974	2.7	143,872	7.4	3.00	4.6
Japan	42,218	-12.7	116,052	-11.9	2.75	0.9
South Korea	18,333	21.0	78,763	35.5	4.30	11.9
Canada	18,815	-9.1	75,839	4.3	4.03	14.8
Netherlands	19,522	-34.9	64,370	-30.7	3.30	6.4
Mexico	20,171	52.0	58,574	77.8	2.90	17.0
Ireland	13,097	-13.2	40,926	-15.1	3.12	-2.3
France	1,976	3.7	36,643	7.8	18.54	4.0
Germany	8,917	-14.5	31,155	-1.0	3.49	15.8
Colombia	10,874	-6.9	29,028	-5.0	2.67	1.9
Russia	10,423	-21.7	25,910	-17.6	2.49	5.3
Denmark	6,090	25.5	24,964	35.1	4.10	7.6
Paraguay	5,972	39.6	15,117	47.2	2.53	5.5
Belgium	4,223	-6.5	14,929	-0.3	3.54	6.6
Finland	3,784	-8.9	12,489	-2.1	3.30	7.5
Sweden	2,881	-30.7	11,583	-17.2	4.02	19.5
Others	63,170	10.7	201,718	9.8	3.19	-0.8
Total	**486,986**	**0.7**	**1,587,321**	**7.7**	**3.26**	**7.0**

New Zealand

Bottled Still Wines

	,000 litres		,000 NZD		NZD/litre	
	2021	% Chg.	2021	% Chg.	2021	% Chg.
USA	68.765	16,3	585.166	12,8	8,51	-3,0
UK	31.220	-19,1	262.381	-13,7	8,40	6,6
Australia	24.795	-15,5	207.484	-7,4	8,37	9,6
Canada	11.560	-4,3	120.514	-8,0	10,43	-3,9
China	2.587	27,8	35.855	36,9	13,86	7,1
Ireland	3.446	-4,5	30.677	-5,7	8,90	-1,3
Netherlands	2.587	-21,3	20.895	-20,5	8,08	1,0
France	1.260	66,5	17.872	65,2	14,18	-0,8
Singapore	1.044	-3,1	17.027	11,2	16,32	14,8
Hong Kong	1.165	-3,5	14.529	-7,4	12,47	-4,0
Japan	1.066	-5,7	12.818	-6,0	12,02	-0,4
Germany	1.285	-55,0	11.051	-36,1	8,60	42,0
Sweden	583	-51,5	7.074	-37,5	12,14	29,0
Denmark	820	10,4	7.040	12,1	8,59	1,5
U.A. Emirates	413	71,9	4.175	39,5	10,12	-18,8
Others	8.995	13,9	81.315	16,5	9,04	2,3
Total	**161.590**	**-2,2**	**1.435.872**	**0,7**	**8,89**	**2,9**

IN THE VINEYARD AND IN THE CELLAR

A selection of machinery, equipment, services and products available on the market, curated by the manufacturers

BEKAERT

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Every winegrower knows that the choice of materials for his vineyard represents a relevant investment that should guarantee a long lifetime, with the best performances of support and stability. Today you can increase the lifetime of your trellis by relying on the superior quality and performances of Bekaert Bezinal® vineyard wires. Thanks to the high tensile strength, you can reduce the wire diameter while maintaining the same breaking load. In this way, with the same weight Bezinal® wires provide you from 40% to 120% more meters per coil compared to heavy galvanized wires. You will save on your time and operational costs thanks to the reduced elongation (4-5%), which will limit the need for re-tensioning activities in the fields. All our wires feature the advanced Bezinal®2000 coating. This new generation zinc-aluminum alloy is a Bekaert exclusive, and it provides superior resistance to atmospheric corrosion and chemicals. Tests in certified laboratories proved that Bezinal® wires last from 4 up to 8 times more than heavily galvanized wires, and twice the time compared to standard zinc-aluminum coated wires. Bekaert has been producing steel wires for over 130 years, and we are present globally with innovative, high-technology products. When you choose Bezinal® vineyard wires, you are relying on a recognized technology leader, which represents a guarantee of certified and constant quality.

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CELLI

EV And Idra, Two New Solutions For Vineyards

Two new models have recently been added to the range of solutions for vineyards by Celli, a company that has been designing, manufacturing and distributing equipment for processing soil all over the world since 1955. The project, called EV, involves a side-shift rotary tiller designed for inter-row processing using tractors with up to 100 HP power, which is higher than those that are suitable for other machinery by the company, such as the BV. The design idea of this new project came from the highly successful E fixed rotary tiller. Many new additions and improvements were added, from the hitch attachment system and hydraulic ram for side-shift movement of the rotary tiller to the thick tube of the rotor and the wider lateral safety guards. This has guaranteed more robustness and higher performance, as well as easier maintenance. To this, the Idra has been added, a mulcher which can operate with medium-powered tractors (from 70 to 100 HP), for which Celli designers have studied special solutions to provide support to specific technical requirements, such as transmission and rotor studied for a lower torque requirement at start-up. In this context, the Idra can be positioned in the range between the Mizar (lighter) and the Scorpio models. The Idra comes in different operating widths, from 2 to 2.85 meters, and in two versions, fixed and mobile, which use the same hood. With these new models, Celli continues to innovate its production line according to the specific needs of operators all over the world.

CMP

Vinplast, An Alternative Solution For The Storage Of Bottled Wine

In 2006 CMP srl has developed an alternative solution for the storage of bottled wine. CMP creates Vinplast, a recycled plastic interlayer for refining wine in bottles, which is undoubtedly the best storage system in terms of practicality, safety and cost-effectiveness. CMP has made over 15 molds to solve the needs of each customer and to guarantee the maximum protection of each bottle. The interlayer pads can suitable for 0.375 bottles as 1.5 liter magnums in total safety and they guarantee optimal conservation of wine and glass. Using this system the customer can optimize the space in his cellar, using all height possible, with advantages even for the aesthetic point of view.

The bottle is stored and protected from dust and light, the glass is preserved from any scratch. Bottle counting is facilitated by the constant and precise number of bottles per tray. When the layers aren't used, the space occupied is minimal compared to traditional systems. In addition each tray weights less than one kg and so it is extremely handling. Vinplast is undoubtedly is the best way to age your wine. CMP has created a network of resellers in many countries to be widespread in the distribution and to be able to satisfy the needs of customers with care and great attention.

ENOMECCANICA BOSIO

Crossflow Membrane Filters - Green Solution Less Waste For Disposal, More Respect For The Environment

Enomeccanica Bosio Srl has been operating in the winemaking field for more than 40 years, growing in parallel with new applied technologies and the needs of individual clients. Our goal is to create machines which are conceptually simple, yet guarantee excellent performance, ease of use and a high standard of reliability. Our crossflow filter has been specially designed for operating on wine, and in particular on very fine wines. Particular attention has been paid to the choice of components and how the machine interacts with the product being treated. Our filter elements require no particular preliminary treatments, and – as requested by end users – considerably reduce the need for maintenance and after-sales service. The ceramic membranes we use have a very low capacity for adsorbing most of the noble components in wine. Furthermore, they have no difficulty withstanding temperatures of up to 100°C and pressures of over 20 bar, and guarantee an operating life which is more than five times longer than that of organic fibre. With our patented "Back-Pulse" products, a turbidity of 0.00 NTU can be obtained in a single step starting from unfilterable values. hanks to latest generation PLCs, our filters comply with Industry 4.0 parameters.

Info: www.enomeccanicabosio.it
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ENOVENETA
Advanced Technologies For The Modern Oenological Process Management

Enoveneta starts in 1960s and during the years has become a leading international company. Within an area of 40,000 sqm and with a team of more than 60 employees, Enoveneta design, produce and trade the most advanced technologies for the modern oenological process management. From conception to the selection of technologies, a 360° consulting service: thanks to our highly specialized team, we can guide each customer through the research phase of the technological solution to best suit his or her production needs. This consultancy relationship is fundamental for us and creates a tight-knit collaboration with the customer that allows us to follow each project closely. Reliable and complete partners for the management of turnkey production unit projects: the complete design, development and production process is managed from our premises in Piazzola sul Brenta, in the Province of Padua, Italy. This allows us to respond promptly to the various requests and to intervene in the customization of the products to best adapt them to the needs of each customer. A timely support service in every corner of the world, even during the harvest: flexibility and efficiency, these are the principles that also define our technical support and after-sales service. Thanks to our foreign branches and international network of agents and distributors, we can respond quickly and effectively to every customer, wherever they are in the world. Expertise, reliability and passion. This makes Enoveneta the main technological partner for the oenological sector. *Info: www.enoveneta.it*

ERO
ERO-Vitipulse Combi, Two Defoliation Systems In One Machine Ensure Gentle Defoliation With Optimal Results

The ERO-VITIpulse Combi, newly launched on the market this year, combines two highly effective defoliation systems, the plucking roller system and compressed air defoliation, in one machine. The highlight is that both systems can be used simultaneously or alone. Likewise, both systems and also both working sides can be controlled separately from each other so that the defoliation intensity can be optimally adjusted as required (sunny/shady side).
Since the outer leaves are removed by the plucking rollers, a low pressure is sufficient to reach the inside of the canopy with the pulsating air blasts. Optimal working results are achieved with minimal plant stress. If the VITIpulse Combi is used after flowering, the flower hoods are detached from the inflorescences, reducing the use of pesticides and increasing quality at the same time. Due to its gentle mode of operation, the VITIpulse Combi can be used until shortly before the grape harvest. *Info: Luca Peretto (Northern Italy), mobile: 348 – 310 89 71, luca.peretto@ero.eu - Giancarlo Maggi (Southern Italy), mobile: 339 – 609 60 14, giancarlo.maggi@ero.eu*

GARBELLOTTO
Artisanal Intelligence

Garbellotto Spa has been producing casks, vats and barriques since 1775: now in its eighth generation, it has taken one of the most important steps in recent history by opening in 2020 the new plant in Sacile. The factory is called "Artisanal intelligence": Industry 4.0, with new robotic lines, support the valuable work of our coopers, allowing the heavier production processes to be soothed by focusing more on the craftmanship, quality and the selection of the best woods and their aromatic nuances. The company was founded over two centuries ago by the carpenter Giuseppe Garbellotto, who specialized in the production of casks, becoming in the 19^{th} century the supplier of the Habsburg's Family. The company halted the production only the first World War, when the lands were occupied. It was restarted at the behest of Giobatta Garbellotto, who reorganized the company according to an industrial scheme. After the Second World War Pietro Garbellotto rebuild it with the intention of developing the timber trade, in order to have always a large quantity and better quality of wood for casks and barrels. The company, with its 80 coopers and 17,000 mc of naturally seasoned wood, produces 100,000 hl of casks, vats and barriques per year and exports all 5 continents.

IDEAL
Ideal Solutions For Your Vineyards

Ideal is a leading Italian company in the industry of crops protection, manufacturing sprayers of all kind and for protection of all types of crops since 1947. Production of sprayers for vineyard care has been for ages its core business and commitment in improving its offer is still very high. Sprayers offered are consequently many and with different features, also thanks to Ideal focus on both customization and innovation, to meet both laws and markets requirements.
Among its models, low volume sprayers deserve to be mentioned. All highly technological but environment-friendly, they allow to work on more rows at the same time as well as a focused liquid supply using very low quantity of water per hectare. This means better results with less resources. Among them, Drop Save remains the most technological and environment-friendly remains Drop Save, allowing an automatic work as well as a 50% recovery on average thanks to its special computer and anti-drift panels. Also, Bora model deserves to be mentioned: its special configuration with fan group hanging on tractor and tank trailed by a tracker drawbar make it the perfect machine to work on more rows of espaliers vineyards on hilly grounds. In addition to low volume models, Ideal provides anyway various sprayers with axial fan, for those farms having smaller extensions or special grounds. Among all, we would remind Loire and Alsazia Top sprayer, both with tower and reverse suction but differently configured to allow proper treatments according to vineyards features. These are only a few solutions among the wide range of product offered by Ideal for vineyard protection, which has been working for almost one century to find the best care for your crops. Please visit our website *www.idealitalia.it* for more information.

METALUX
High Quality Capsules

Metalux Capsule was established in 1964 by Dino Ilario Dal Ri in Italy. Being a pioneer in global capsules' production and with over 55 years of experience and know-how, Metalux supplies high quality capsules to over 40 countries worldwide which makes Metalux one of the main well-known manufacturers of bottle capsules in the global packaging market. Available products are PVC capsules, aluminium wine capsules, capsules for sparkling wines and PET capsules. The main activity of the company is the production of PVC, PET and aluminium bottle capsules, according to the latest technologies in production processes. Recent addition to our variety of products is the PVC-Free heat shrinking capsules, PVC-Free polylaminate capsules and PVC-Free champagne capsules. Metalux is always valid in order to satisfy any new requirement of each client and ensure for the best result. Most customers of Metalux are active in the production of wine, champagne, sparkling wine, olive oil, alcohol beverages and beer. The history of Metalux is based on investment in technology and equipment and its philosophy is that "a quality product has no boundaries".
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RINIERI
In the vineyard next to you since 1920

Rinieri srl is an Italian brand that has been making agricultural machinery since 1920, specializing in the vineyard equipments in the last 50 years. Rinieri produces and sells more than 4000 machines every year, in all over the world where you can find some vineyards and orchards. Our offer of agricultural machinery for vineyard cultivation includes a range of machines that are adapted to all types of terrain for: mechanical weeding, suckering of the plant stem, cutting grass in the row, soil cultivation, shredding the sarments, canopy management, pruning and all inter-row cultivation requirements. In this way we are able to offer agricultural equipment tailored to the needs of each customer, from small businesses to large contractors. In every season and in every condition, our equipment helps you to manage your vineyard and its operations. Our solutions for inter-row tillage with power harrows, rotary tillers and tool holders with blades or ploughs are the result of years of field experience in the wine sector combined with extensive research and studies by our technical department, which constantly follows the latest developments on the world scene. One of the latest technical innovation on the market is the Bio-Dynamic with finger weeders, the "Biostar", designed for fast mechanical weeding without damaging the plant: the soil is fractured upwards from the root zone germinated weeds do no longer draw moisture and nutrients out of the growing zone. *Please visit our website www.rinieri.com for more information.*

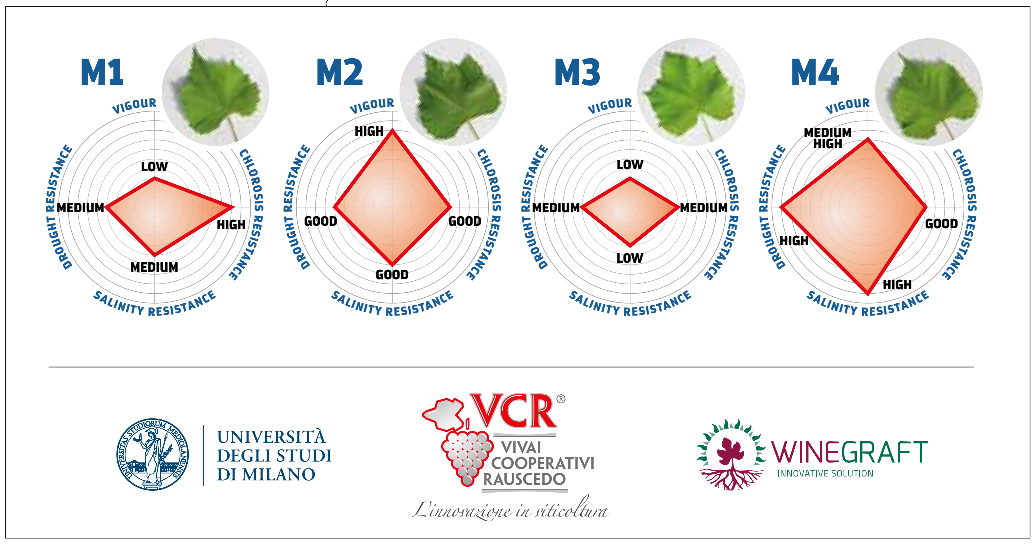
NORTAN
New Syncrocap Capsule Distributor

Thanks to an innovative mechatronic project (Feds Technology), the new Syncrocap distributor can automatically adapt to the different capsules to be processed, thus reducing the format change times up to 80% and the imperfections due to human intervention. Compared to standard capsule distributors, the new

Syncrocap represents a significant step forward for the whole sector. Each component has been completely rethought and redesigned around the following objectives: *processing optimization, increase in reliability, reduction and simplification of maintenance, minimization of the format change times for operators.* The main heart of the innovation is the fully electronic separation and distribution group, where a new proprietary mechatronic technology (Patent Pending) called F.e.d.s. Technology (Fully electronic distribution system) has been implemented. This leads to a reduction in setting and format change times by the operator of about 80% and to the complete elimination of errors and problems that may arise due to rough adjustments. Furthermore, thanks to a series of algorithms that encompass all Nortan experience, all mechanical devices have been eliminated and the concept of "Electronic Cam" has been introduced, which allows to automatically adapt the timing and parameters of the various components based on the type of capsule in work. The 40% reduction in details and the optimization of production processes has led to a significant increase in reliability.

VCR VIVAI COOPERATIVI RAUSCEDO
Rootstocks For The Viticulture Of The Future

In the second half of the 19th century, the phylloxera destroyed several thousands of vineyard hectares in Europe; the viticulture could survive by grafting the vine on rootstocks originated from American vine species that were resistant to the aphid attack. Over a hundred years later, some of those rootstocks, such as 1103P, 110R, 140 RU, SO4 or K5BB, are still at the basis of viticultural nursery, representing about 90% of the total grafts. Nevertheless, the viticulture expansion into new areas with peculiar pedoclimatic conditions, the climate change, and the demand for greater sustainability have required to resume the breeding activity to renew rootstocks offer accordingly to the new needs. In the 1980s, the University of Milan began a new rootstock breeding program, and in 2014, registered the four M series rootstocks in the Italian Catalogue of Grapes Varieties. The new rootstocks respond more efficiently to limiting factors such as water shortage, iron chlorosis and salinity. They have higher potassium and magnesium absorption capacity and induce lower vigour favouring the quality of the grapes. The M series rootstocks are exclusively propagated and sold worldwide by the "Winegraft S.r.l." and the Vivai Cooperativi Rauscedo and are now available to all winemakers!



^ *The characteristics of the M series rootstocks*