

A NEW INSIGHT IN THE WORLD OF WINE

Speaking to the global planet of wine and speaking of it with words, as well as with numbers, data and reportages, analyses and scenarios. This is why this new special edition of *Il Corriere Vinicolo* came about, together with *Vinitaly*. The oldest wine magazine in the world goes beyond the Italian borders and aims at hosting the international discussion about wine. It is a special project in a special year that looks at the five continents where today wine is a protagonist in the vineyards and on the table. Enjoy.

WINE WORLD MAGAZINE

by IL CORRIERE VINICOLO

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WORLD WINE TRADE: FORECASTS FOR 2020

The Economic Burden of Uncertainty

The first quarter of the year closed at -4 percent, but it was the one least affected by Covid-19. The real problems started from June onwards. We analyzed what might happen on the world arena in three scenarios, all of them negative ones.

World wine trade in the first quarter of 2020 was down by 4 percent in volume, with peaks of 6 percent on bulk wine trade and -4 percent for bottled wine. On a continental level, only the Americas show a positive trend (+4 percent, driven by sparkling wine with +18 percent, while bottled still wine stopped at +1 percent). However, a strong downturn was registered in Europe (-5 percent, with extremes of -10 percent for sparkling wine) and especially in Asia, weighed down by the terrible Chinese and Japanese performance, with a global balance of -13 percent. Leaving the reader to analyze the performance of the main import and export countries (dealt with in more detail inside the magazine), we can give a forecast with data processed by the Wine Observatory of the *Unione Italiana Vini* for the end of the year, based on three scenarios, all three with negative outcomes.



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EDITORIAL

A Magazine For The New “Global Wine”

by GIULIO SOMMA  
Editor-In-Chief of *Il Corriere Vinicolo*

When the first issue of *Il Corriere Vinicolo* came out in Milan, Italy, in 1928, as the magazine of *Unione Italiana Vini* (still the oldest and most important Association of Italian Wine Producers today), the term “global” didn’t appear on the pages as an indication of the magnitude of market phenomena, and wine was almost exclusively a European product. The great Italian, French and Spanish wines had already crossed the ocean to conquer elite consumers in different countries of the world, but it was a limited phenomenon, a far cry from the mass dynamics that wine consumption has taken on all over the world today. And vineyards were already present in some non-European countries, for instance South Africa, Australia, Chile or California to name just a few, but they were mostly known at a local level and had a generally limited economic value. Since then, the magnitude of wine on a global level has radically changed. What’s more, there is now no country on earth where the ancient drink of Bacchus is not drunk. There is no area of the globe that doesn’t have its own vines, its cellars housing wines with a strong territorial imprint that expert producers perfect, year after year, throwing themselves into conquering markets in a great competitive agon that no longer has boundaries. Wine has left its European cradle forever to become a global phenomenon to all intents and purposes, in terms of both consumption and production. And we, who have experienced this great expansive phenomenon supported by a winemaking system that has led the way, together with an industrial chain of machines, technology, products and solutions for winemaking and viticulture that has led the globalization of wine production by bringing Italian know-how to all the continents that grow vines today, we couldn’t just sit back and be spectators or narrators of this extraordinary event. And so, the oldest weekly wine magazine in the world, at the dawn of its 92<sup>nd</sup> year, decided to open a window “on and for” the global wine world, broadening the experience of Wine by Numbers, the statistical magazine of our journal dedicated to world markets and started over eight years ago. This led to the creation of WWM, Wine World Magazine, *Il Corriere Vinicolo*’s international publication. It is a magazine designed for the modern producer of “global wine” who is

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ON THE AGENDA AT VERONAFIERE FROM 22<sup>ND</sup> TO 24<sup>TH</sup> NOVEMBER, AT THE SAME TIME AS THE WINE2WINE BUSINESS FORUM

A NEW INTERNATIONAL EVENT ON ITALIAN WINE, THE WINE2WINE EXHIBITION

WINE2WINE exhibition

RIDE THE WAVE OF BUSINESS

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CEO OF VERONAFIERE  
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BETWEEN BRANDS AND E-COMMERCE  
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Italy's Prosecco is more dynamic in searching for new outlets, with France historically overtaking Germany, and significant growth on second-level markets. Asia is growing, but still too slight

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*On the agenda at Veronafiere from 22<sup>nd</sup> to 24<sup>th</sup> November,  
at the same time as the Wine2wine Business Forum.  
Three days at the service of wineries, aimed at a B2B and B2C public*

# THE WINE2WINE EXHIBITION IS HERE

## The New International Event on Italian Wine

**T**his innovative smart event dedicated to the wine sector aims to bring together businesses, content, meetings, education and ideas. The Wine2wine Exhibition is a new format of the Vinitaly ecosystem, on the agenda at Veronafiere from 22<sup>nd</sup> to 24<sup>th</sup> November 2020, at the same time as the Wine2wine Business Forum. Three days at the service of wineries, aimed at a B2B and B2C public in order to support the relaunch of the market and the Italian wine system (and more) after the lockdown phase and in view of phase 3 of the recovery. The event was presented online by Maurizio Danese, president of Veronafiere, and Giovanni Mantovani, CEO of Veronafiere. Among those taking part in the meeting moderated by Gennaro Sangiuliano, director of TG2 news programme, were Carlo Maria Ferro (president of ICE-Agency), Federico Sboarina (Mayor of Verona), following contributions by Luigi di Maio (Minister of Foreign Affairs and

International Cooperation), Teresa Bellanova (Minister of Agriculture, Food and Forestry Policies) and Luca Zaia (President of the Veneto Region). Over one thousand registered users logged on, including wineries and journalists.

### An Original Project to Tackle Exceptional Times

The Wine2wine Exhibition is an original project to face this exceptional moment in time and which Veronafiere created to give a positive response to producers' needs. The first of these is the need to resume dialogue with the national and international wine community: distributors, buyers, restaurant owners, specialist press, opinion leaders and also consumers. It is the first great united event in autumn aimed at the winemaking sector that gathers together public institutions, regions and consortia, in collaboration with the Ministry of Agriculture, Food and Forestry Policies, the Ministry for Foreign Affairs and the ICE-Agency, all working together at Veronafiere towards

the incoming flow of foreign buyers.

The Wine2wine Exhibition has been developed according to #safebusiness safety protocols agreed with the main Italian trade fair workers and health authorities. There will also be the latest digital tools so that the whole international community of buyers can take part in virtual B2B meetings, masterclasses and guided tastings online.

The event will open its doors to wine lovers on Sunday 22<sup>nd</sup> November, with direct sales to the consumer, while the other two days will be reserved for professionals in the sector. Three pavilions at Veronafiere will be used: 9, 10 and 12, with access via the new Re Teodorico entrance, on Viale dell'Industria. The exhibition will be organised like a walk-around tasting, with a route based on themes and geographical areas that illustrate the Italian designations and wine types. There will also be exhibition spaces housing spirits, rosé wines, special wines and international wines.

The advantage of the Wine2wine Exhibition is the fact that this event is tailor-made to the contingent needs of wineries, with personalised participation fees, maximum economic return on investment and minimal organizational and logistics obligations for exhibiting wineries fresh from the labours of the harvest, thanks to turn-key stands and services. At the trade fair, the exhibition integrates perfectly with the training and networking events of the Wine2wine Business Forum (23<sup>rd</sup>-24<sup>th</sup> November) and the presentation of the 100 best Italian wines at OperaWine, selected by Wine Spectator (21<sup>st</sup> November). In addition, new opportunities and synergies in agribusiness will be explored at the same time as B/Open, Veronafiere's B2B event on certified organic food and natural self-care which will debut on 23<sup>rd</sup> and 24<sup>th</sup> November, in Pavilion 11.



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### A Magazine For The New "Global Wine"

looking for information on research trends in the vineyard and cellar, innovations in technology and the solutions science offers to the production system. The focus is on analysing the development of international markets, so it looks for in-depth information on world wine trade scenarios and markets of individual countries (emerging or already mature), because their continually evolving taste and consumer trends hide (or reveal) new business opportunities. On these markets, our magazine encounters "the other side" of the supply chain, buyers and distribution workers who we will converse with via studies on global business trends, data, statistics and analyses of the scenario of individual wine types as well as specific areas or countries in the world, which become valuable for those who deal with continually changing markets on a daily basis. Science, research, innovation, technology, production systems on the one hand, data,

statistics, scenarios and market trends on the other, as well as politics, culture, environment, territory and tourism linked to wine have always been our "daily bread". They have made Il Corriere Vinicolo a unique magazine in the world, which we want to offer to wine producers and professionals all over the planet, starting from today. We would like to set off on a path of sharing with you, to construct the new "global wine" magazine together. We welcome any comments, ideas, criticisms and suggestions that can help transform "our" magazine into "your" magazine. We are looking forward with a thousand-year-old history behind us, which helps wine to maintain its fascinating unique nature that has won over (and will continue to win over) consumers of many languages and different cultures.

Enjoy the read!



UNIONE ITALIANA VINI

WHAT IS THE UNIONE ITALIANA VINI?  
(Association of Italian Wine Producers)

Founded in 1895, the Association of Italian Wine Producers is the oldest and until today, the most important association of Italian wine producers. It gathers over 600 companies and 150,000 wine producers, making up to 50 percent of the Italian wine revenues, 85 percent of the country's wine exports. The association works as a general representation of the wine sector, and aims at protecting the interests and representing the sector, its companies and categories at the national and international level.

The Association of Italian Wine Producers is based in Rome, Milan and Verona.

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## The Economic Burden of Uncertainty

### 1<sup>st</sup> Scenario. Maintaining the Same Pace As in the First Quarter

This is the least predictable scenario, because world imports for the first quarter also include the product sent from the country of origin in the last months of 2019 in the calculation, when the Covid-19 epidemic hadn't broken out yet. In terms of quarters, therefore, a deterioration is forecast for the second quarter, followed by a partial return to the pace at the end of 2019.

If the year should end with a negative annual figure of 4 percent, thus reflecting January- March, estimated losses on total 2020 trade would be 3.3 million hectolitres, 1.7 of which bottled still wine and 1.5 bulk wine. There is a neutral effect of sparkling wines, which benefit from the North American boost.

### 2<sup>nd</sup> Scenario. An Increase of 2 Percentage Points on March Losses

This scenario is definable as moderately negative, and absorbs the effects of Covid-19 already revealed not only in Asia, but also in Europe (espe-

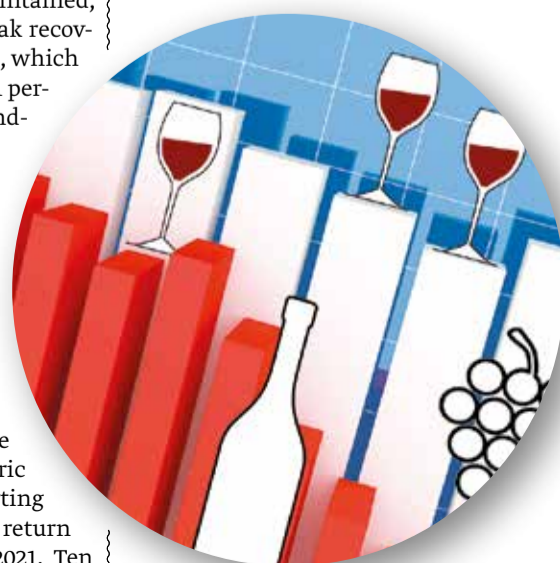
cially in the UK, France, Germany and Russia) and America, but like the first scenario, it foresees a reversing of the trend at the end of the year. A final closure of -6 percent leads to a reduction in volume of 5 million hectolitres, 2.7 of which are bottled still wine and 2.2 bulk wine, with sparkling wine still on neutral territory (200,000 hectolitres of physical loss, at 5.3 million hectolitres in total). In terms of quarters, the negative quarter is the second and third quarter is maintained, followed by a very weak recovery in the fourth one, which in any case closes at -1 percent on the corresponding period in 2019.

### 3<sup>rd</sup> Scenario. An Increase of 6 Percentage Points on March Losses

This is the most difficult scenario, because it assumes the pandemic will deeply undermine the economic fabric of the main importing countries, delaying a return to normality until 2021. Ten

percent total on world trade corresponds to 8 million hectolitres less wine than in 2019 - 4 of bottled wine (-9 percent) and 3.6 percent bulk (-13 percent). Also Sparkling wine is decreasing at -400,000 hectolitres (-8 percent).

In terms of quarters, the situation in March gets worse in both the second and third quarter of the year (with extremes of -11 percent), while the balance in the fourth quarter slightly recovers, but remains negative (-5 percent).



**GIOVANNI MANTOVANI, VERONAFIERE'S CEO, TALKS ABOUT HOW THE AIMS OF THE WINE2WINE EXHIBITION ORIGINATED**

# WINE2WINE Will Put Italian Wine Back at the Centre of Markets

*The first B2B (also B2C) event "of and for Italy's supply chain" that examines the world of trade. It is an innovative, both physical and virtual format aiming to restart national and foreign markets*

In a few months we have gone from a health pandemic to a global economic pandemic affecting all sectors, forcing them to suddenly change their strategy in order to safeguard the market positioning they had achieved prior to the first two months of this year. The signs of suffering expressed by our country's main assets today are already clear. These include those represented by Veronafiere SpA, especially agribusiness, and more specifically wine, which made 6.4 billion euros in exports in 2019, up by 3.4 percent on 2018. It is a sector with a positive trade balance: 6 billion euros surplus in the past year. With respect to this data, the scenario drastically and quickly changed from March onwards and world lockdown inevitably caused heavy setbacks. In just a few days, Italian wineries had to face the closure of their main national and international market positioning channel (HORECA); a replanning on markets and a new business area to operate in. In addition, the 54<sup>th</sup> edition of Vinitaly was postponed, international events were cancelled or moved from the first to the second quarter and stocks in the cellar grew each week on the eve of the new vintage. Seeing its consolidated and recognised role of promoter of Italian wine all over the world, Veronafiere could not remain powerless and has made the relaunch its objective, as called upon by the Minister for Agricultural Policies, Teresa Bellanova. We have been working during these months, gathering requests from wineries in order to offer an innovative business event to stimulate recovery and support the relaunch. To do this, we mobilized all the leading figures and institutions: the Ministry of Agricultural Policies; Ministry of Foreign Affairs and International Cooperation; the ICE Agency. And we shared the project, which was presented last week. It uses all of Vinitaly's know-how to guarantee an event that can really meet the needs of Italian wine in this historic period.

## Putting Italian Wine Back at the Centre

From 22<sup>nd</sup> to 24<sup>th</sup> November, the Wine2wine Exhibition will be the first B2B (and B2C) event 'of and for the Italian supply chain' which examines the world of trade. It is a flagship event that aims to put Italian wine back into the picture and on world markets after the emergency. This event tags onto the Wine2wine Business Forum, which is already in its seventh edition. As the Minister Di Maio stated, the wine2wine Exhibition is "a unique event in an exceptional situation."

It has an agile, innovative and born-digital format, in an environment that integrates physicality and virtuality, with the aim of getting both national and foreign markets going again, as well as international demand.

The Wine2 wine Exhibition completes the path towards the event that envisages a strong digital promotion. In fact, Veronafiere has already begun an important campaign which stands out for its content and reports, as well as a calendar of professional webinars that enable Italian wineries to talk with the most important and influential professionals and buyers from various markets, many of whom will then be present in Verona.

## The Programme

The November event will follow a route based on themes and geographical areas: the focus will be on illustrating the main designations and wine types, based on the concept of a walk-around tasting. One of the innovations is a day dedicated to wine lovers. On Sunday 22<sup>nd</sup> November, the doors will open to consumers who wineries can sell directly to. This is an unusual idea, and very useful to wineries in these exceptional times.

The next two days, on the other hand, will be for business, which is our core activity. Physical and digital encounters with buyers and distributors, HORECA professionals and Ambassadors of the Vinitaly International Academy are just some of the cornerstones of the wine2wine Exhibition. The content will be completed with the w2w Business Forum on the 23<sup>rd</sup> and 24<sup>th</sup> November, an international networking and educational event dedicated specifically to scenarios of the post-pandemic export map.

Moreover, the main stakeholders and international media will be present: Decanter, Vinum, Revija Vino (Slovenia), the International Wine&Spirit Competition and the Gilbert & Gaillard French guide.

It is clear that we will be aiming for the presence of the most important professionals and buyers from the most strategic markets. All of this depends on how the situation evolves, but in any case, we are ready to offer efficient and concrete solutions.

Our network of relations didn't go into lockdown, on the contrary, we intensified our efforts and investments because we realize we are an essential tool for the internationalization of Italian products for wineries and institutions alike.

This role is recognized by the government and also by the export pact signed on 8<sup>th</sup> June by the head of the Ministry of Foreign Affairs, the Minister of Agricultural Policies, Teresa Bellanova, the President of ICE, Carlo Maria Ferro, and other institutions. It assigns about 1.4 billion euros to go towards the strengthening of the internationalization of companies. And Veronafiere is on the front line with ICE Agency, both for the main strategic European markets for Italian wine exports, like Germany and the United Kingdom, as well as non-EU markets: the USA, China, Russia, Japan, Canada and Switzerland. At the moment, we can announce more in-depth work in Japan with Thierry Cohen, president of Japan Europe Trading. VIA (Vinitaly International Academy) ambassadors are involved once again, to endorse products, as well as Gino Colangelo, Leon Liang (Grapea), David Gleave (Liberty Wines) and Steve Moody (Fells). We are working on a further series of events with the active support of ICE offices in Russia, the USA and Canada and the Chicago Chamber of Commerce.

As for the United States, the top destination market for Italian wine, we can announce that the Opera Wine 2020 event will take place on Saturday 21<sup>st</sup> November: a tasting of the top 100 Italian wines selected by Wine Spectator, who will be present at the event.



From the left, Maurizio Danese, president of Veronafiere, and Giovanni Mantovani, CEO of Veronafiere

*The prestigious gala that traditionally inaugurates Vinitaly will initiate Wine2wine this year. An exclusive interview with the editor of the magazine, Thomas Matthews*

## OPERA WINE TO OPEN Wine2wine This Year

During the last edition of Wine2wine Business Forum (25<sup>th</sup>-26<sup>th</sup> November 2019), Bruce Sanderson, senior editor of Wine Spectator, announced the line-up for OperaWine 2020, i.e. the 103 best Italian wine producers named by the American magazine. The producers should have taken part in Vinitaly's exclusive opening gala, but this year OperaWine will open the 2020 edition of Wine2wine. Like every year, OperaWine will open its doors by invitation only to a public made up of journalists, professionals and key figures from all over the world. The focus will be on the diversity of Italian wine and its promotion, themes to be handled with particular care during the gradual reopening after Covid-19.

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Group picture of producers selected by OperaWine in 2019, on the steps of the Gran Guardia Palace in Verona. (Ph. Sophia Lonardi)

**WINE WORLD MAGAZINE** by IL CORRIERE VINICOLO

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## OPERA WINE WILL BE A CELEBRATION OF THE WINE COMMUNITY

What is happening in the USA? Some observations on the wine market in the post-Covid phase by Thomas Matthews, executive editor of Wine Spectator, in this exclusive interview with our magazine while waiting for Opera Wine 2020.

"If we can get together to share a glass of wine, we will feel like ourselves again," Mr. Matthews says. "It will certainly be a good thing for business, but more than anything it will be a statement of our shared history and a step towards a better future."

### Could you give us an idea of what is happening on the American wine market right now? What is the current situation and how are your businesses reacting?

The American wine market has been in turmoil for most of 2020. Firstly, duties placed on wines and spirits from certain European countries have led to an increase in prices and changes in consumption. Lockdown caused by the pandemic led to a block of almost all restaurants, bars and hotels. Lastly, the economic aftershocks caused a steep increase in unemployment and a fall in general spending on consumption. Our studies indicate that overall wine sales in the United States fell by 28 percent between April 2019 and April 2020. However, there are two silver linings. Sales in off-premise retail stores have increased, with a rise of 26 percent in April 2020 compared to April 2019, which has continued to increase, although with more limited surges. Moreover, direct sales from wineries to consumers have significantly increased: +15 percent in April this year compared to the same month in 2019.

### The general opinion is that large wineries will still be around in the post-Covid-19 phase. But what will happen to the smaller ones? What help programs for small wineries would you suggest be introduced and put into effect?

Prospects for businesses linked to the wine world differ according to the type of business. Even large companies, for instance national importers and large wholesalers, have suffered because they depend on on-premise clients. Companies who have consolidated direct relations with their consumers, on the other hand, did well, whether they were large retail stores or small wineries. However, it is true that small businesses, especially family-run restaurants, were the worst hit by the consequences of the pandemic. Some analysts estimate that 25 percent of all restaurants will not be able to reopen even when restrictions are lifted. The US government and some states have set up help

programs to support small enterprises, but unfortunately the laws have not been specifically aimed at the catering industry. They have been tweaked a bit, but restaurants still need further help. Proposals include assistance to help face rent payments, amnesty for salaries paid to employees during lockdown and for tax credits due.

### Let's talk about the relationship between the wine industry and digital transformation: do you think that this health (and also social and economic) emergency has helped encourage further reflection on this? And if so, how?

The obligation for people to stay safe in their homes has certainly favoured digital-based companies compared to those who depend on physical sites. At Wine Spectator, we experienced a drastic increase in the digital public, so we implemented new products to exploit this growing demand: our series "Straight Talk" via live video chats on Instagram is one example. Wine shops saw a shift in business from clients coming into the store to orders via web services. Several wineries that have lost orders from restaurants have been able to compensate with direct sales of more wine to loyal consumers.

### According to Wine Spectator, what role can an event like OperaWine play in this historic moment.

After three months spent in various degrees of isolation, people are hungry for human contact. We have discovered that distance working can be productive, but also unsatisfactory. Being with others, talking face to face, sharing wine and food: these are essential moments for our wellbeing. OperaWine will be a celebration of the wine community and the network of relationships that holds it together. If we manage to get together to share a glass of wine, we will feel like ourselves again. It will certainly be good for business, but more than anything it will be a statement of our shared history and a step towards a better future.

### Do you have any forecasts for export trends for Italian wine in the near future?

During this pandemic period, US consumers turned to wineries and brands they already knew and trusted. Many Italian wine producers have established solid relations in the United States, and their sales have remained strong. The Americans are curious, and have demonstrated a thirst for traditional wines made with native grapes by producers who demonstrate authenticity and promote their cultural heritage. Italy is rich in these resources and, once the pandemic has passed, these producers will prosper once more. In my opinion, the greatest threat for Italian wine sales in the United States is duties on exported European goods. If they remain, or even increase, higher prices could halt the demand for Italian wines.



The Wine Spectator team in a previous edition of OperaWine. From the left: Bruce Sanderson (senior editor), Alison Nappus (senior editor and tasting director) and Thomas Matthews (executive editor)  
Ph.: Vitality International Graphics Team

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**2021**  
VERONA, 18-21 APRIL

## Confirmation And Changes to the Veronafiere Programme



Above, cutting the ribbon at the opening of Veronafiere's Shanghai premises in 2018. In the foreground, from the left: Simone Incontro, director of Veronafiere's Shanghai premises, Michele Cecchi, Italian consul general in Shanghai, Ettore Sequi, then Italian Ambassador to China, Giovanni Mantovani, CEO of Veronafiere, and Maurizio Danese, president of Veronafiere. Photo on the left, some moments from the Western China International Fair in Chengdu, where Veronafiere-Vinitaly accompanied MISE's (Ministry of Economic Development) "China Task Force."

# THE "HOT AUTUMN" OF VINITALY IN CHINA

The first signs of the Chinese market picking up with very interesting recovery prospects. Vinitaly China Roadshow (14-18 September), Vinitaly Hong Kong (5-7 November) and Wine to Asia (9-11 November) are the upcoming dates dedicated to the wine world in Asia. Veronafiere's digital working is increasing, with social media campaigns and live-streamed wine tastings. The market data, 7 million dollars to kickstart the market in Shenzhen and the new trend of small wine bottles

**L**ive-streamed wine tastings, roadshows, social media campaigns and MiniApps for B2B meetings. Vinitaly's activity is undergoing exciting changes in China, where Veronafiere has a permanent branch, in Shanghai, in the central business district of Xuhui. Despite the temporary slump in the market due to the Coronavirus emergency, Vinitaly's activities continue, with particular focus on the digital world and planning autumnal events.

### Vinitaly's Calendar in China and Digital Activities

At the end of summer, Veronafiere's calendar is full of a series of dates dedicated to the wine world in Asia: Vinitaly China Roadshow (14-18 September) stopping at Shanghai, Xiamen and Chengdu, together with ICE and Pacco Communication; Vinitaly Hong Kong, from 5 to 7 November; while 9 to 11 November will see the debut of Wine to Asia, the new fair dedicated to wine professionals from the Asia-Pacific region, promoted by Shenzhen Baina International Exhibition Ltd, who organises fairs and events in China and Asia.

"As a whole, Asia is a very interesting market with excellent prospects for development both for the wine sector and the various Italian supply chains," **Flavio Innocenzi**, sales director of Veronafiere, explained. "China is slowly emerging from the Covid-19 emergency and, although there

are no fairs or large international events planned until next October, many roadshows and B2C events dedicated to the end consumer are being organised during these months. Our aim is to latch onto this recovery even more motivated than before and to make sure our fairs take place, as well as roadshows and all the digital activity."

While awaiting these events, Veronafiere organised several live streaming wine tastings, featuring wineries from Tuscany, Marche and Veneto and important Chinese buyers with premises in Shanghai, Chengdu, Beijing and Hangzhou.

In coordination with the Verona site, the Shanghai office has set up a social media campaign #sharethevine, identifying the most popular reference platforms in China, such as Yizhibo, WeChat, Weibo and Tik Tok. This last channel was recently activated by Vinitaly in China to directly identify end consumers and distributors in order to help support companies and importers already present in Asia. Some wine consortiums were involved on Weibo and WeChat and their directors and presidents explained how they were tackling the emergency, what their strategies for the future were and their reference markets.

WeChat is a MiniApp that will be used to publish the digital wine catalogue again this year and to assist messaging and B2B meetings between exhibitors and potential buyers. In view of the third edition of the Vinitaly China Roadshow, a campaign will be launched in support of WeChat, with Chinese influencers on the official account of Vinitaly, and another one to promote Italian wine,



together with the institute for foreign trade ICE, through a promotional event called "I love Italian wine."

### The Wine Market in China in These Covid Days

Professionals defined 2020 as the most difficult year for wine sales in China in the last decade. After the forced lockdown during these past months, the country's economy has not completely recovered yet. Restaurants and bars started doing business again, but wine sales are struggling to return to pre-Covid-19 levels, inasmuch as most wine consumption in China depends on corporate dinners and events, which currently have to stick to strict anti-gathering rules.

As the China Economic Research Institute reported, in April imports fell by 47.8 percent on an annual basis, for a total of 29.15 million litres imported, while the value dropped by 48.5 percent compared to

the same month last year, to around 138 million dollars.

But what are the reasons for this sudden slowdown? And why is this decline worse than in January-February 2020, right in the middle of the pandemic, when it stopped at 30.4 percent for volume and at 28.3 percent in value?

In April the pandemic lessened in most regions of China and consumption of spirits and alcoholic drinks began to pick up. So why this new setback? There are three main reasons. Firstly, the difficulty facing large international logistics companies, especially for sea transport: in fact, many shipping companies had to cancel shipment programmes, resulting in a lack of space leading to an increase in prices for transporting containers, which doubled in one month.

Moreover, March and April were the months of maximum spread of the pandemic in European wine-producing coun-



**FLAVIO INNOCENZI**  
Sales director of Veronafiere

tries and this inevitably had repercussions on the wine producers' activities that they had to stop, or in any case reduce production, with consequences for wine exports. Finally, expectations and fears about market trends also played an important role. Many Chinese buyers, lacking funds and worried about the situation, decided to delay executing orders, therefore slowing down wine imports. "After the slowdown that markets suffered in the past months, May already saw a gradual recovery in consumption," **Simone Incontro**, director of the Shanghai branch of Veronafiere, commented. "In view of the upcoming traditional Chinese celebrations for the second half of the year and the return to business of European wine producers, we expect an upturn in wine imports in July and August, in both volume and value, and this is precisely why promotional activities in this country are essential."

#### In Shenzhen, 7 Million Dollars to Kickstart the Market

Various strategies have been implemented in China to relaunch the economy. While many cities in the country issued vouchers for restaurants and foodstuffs to encourage domestic consumption, the city of Shenzhen, in the Guangdong province, decided to support the city's 200 retailers of alcoholic beverages by handing out 7 million dollars in vouchers to local residents. The aim is to increase sales of a wide range of beverages, including wine, the Chinese spirit baijiu and beer. The residents of Shenzhen can use these vouchers to buy the alcohol of their choice in designated shops. Shenzhen, not far from Hong Kong, is considered the main

centre for wine consumption in southern China, as is the province of Guangdong, which spent 8.2 billion dollars on alcoholic beverages in 2018, according to the latest available figures.

#### New Trends, Mini Wine Bottles

Mini wine bottles are one of the new trends spreading through China. Some buyers are trying out this idea to relaunch the domestic beverages market after the Covid-19 emergency. The quarter bottles (187 ml) are becoming popular on e-commerce channels. On Taobao, one of the most popular Chi-



nese sites run by the Alibaba Group and similar to Amazon and eBay, if you type "mini bottle of red wine" you find several items between 20 and 30 yuan, products that reach thousands of monthly sales in volume. And the 250-ml bottles of wine are just as successful. The advantages? Mini bottles currently cover a minimal part of the market, but the potential customers are numerous, starting from young wine enthusiasts living alone. This new idea is ideal for dinner at home or for people who like a drink but have a low alcohol tolerance, as well as not making customers feel pressured to buy, especially when it's a new wine.

## AN INTENSE INTERNATIONAL ROAD MAP

**T**oday, Vinitaly is an ecosystem of over forty ventures in Italy and abroad, where all the highest consumption markets are monitored, both historic ones like North America and Europe, as well as more recent ones such as Asia, Russia and South America. There are two "vintages" in the life of Vinitaly that mark its international vocation, 1978 and 1998.

In 1978 the Ministry for Industry approved the "international" status for Vinitaly. In 1998, 100 years since the foundation of Fiera di Verona, China Wine was organized in Shanghai.

In the second half of the 1990s, Vinitaly was still missing a step to complete the road to internationalisation - to physically take the promotion formula linked to the brand directly where the emerging markets were. China Wine is the seed of what would go on to become the Vinitaly World Tour, Vinitaly in the World from 2010, and lastly Vinitaly International.

The last decade of the 20<sup>th</sup> century was paved with momentous, political, economic and technological changes that altered geopolitical balances and cancelled geography like during the first Iraq War or the Balkans War following the break-up of the USSR. The world discovered the internet, email and fear of the Millennium Bug. This was nothing compared to what would happen in 2001, with the terror attack on the Twin Towers in New York City, resulting in the second Iraq War. It took courage, foresight and determination to believe in internationalisation.

The origin of Vinitaly abroad was similar to that of Vinitaly in Verona, with internal and external forces that were unsure of the real effectiveness of organizing or taking part in it, in that period of unrest. But Veronafiere didn't give in and the overseas offshoot of Vinitaly grew in a short time.

At the start it was a veritable non-stop tour, which called at many cities in China, Japan, India, Russia and the United States, with different types of events, and made forays into areas of strong interest such as Singapore and South Korea. The events were numerous and involved worlds seemingly leagues



apart from the customary wine world, for instance the cinema (Los Angeles) or the Olympics (in Beijing).

Over time, Vinitaly in Verona became a point of arrival and departure for over forty events that take place all over the world each year, starting the day before the main fair with OperaWine, which began in 2012. It is Wine Spectators' only overseas event and presents 100 wines from 100 producers (representing all of Italy's regions) to buyers and journalists in a special première event to the fair held from Sunday to Wednesday.

In 2014, another piece was added to the puzzle. The educational enterprise Vinitaly International Academy was set up to promote knowledge of Italian wines all over the world through courses. It issued two certificates based on the skills achieved: "Italian Wine Ambassador" and "Italian Wine Expert"; to date, there is a total of 236 in 36 countries worldwide.

The reasoning behind the road map drawn up by Veronafiere through Vinitaly has always been to act as a tool to help businesses and to promote wine knowledge on international markets. Collaboration with institutions (MIPAAF, MISE and MAE), ICE, Embassies, government bodies of countries where important relation-forming events are held, aims to make investments from European, national, regional funding, or completely private funds, more targeted and effective, in order to make a concrete contribution to the economy. This also contributes to the image of Italy. Over the years, Italy's wine has become an ambassador of the highest value that the country can express and it is esteemed for this all over the world.

## Vinitaly's Long March to Asia

**1998** In its centenary year, Veronafiere confirmed and relaunched the international nature of Vinitaly by taking Italian wine to Shanghai, in China, with China Wine. It was a positive experience that was repeated over the next few years.

**2002** In June, Veronafiere went to Singapore with Vino&Olio.

**2003** The fair took part for the first time in IFOWS, the Italian Food and Wine Show in Mumbai, India.

**2004** After six years of presence, the "Vinitaly" brand was used for the first time directly in China, and for the very first time in Russia.

**2005** The internationalisation phase of the brand was strengthened to support the national winemaking system. New "measures" in India with IFOWS to pave the way for the first real edition of Vinitaly India. In November, the 7<sup>th</sup> edition of Vinitaly China was held in Shanghai.

**2006** Vinitaly extended its presence on the Asian markets thanks to Vinitaly Japan, in Tokyo in November, the first editions with the Vinitaly brand in India, in Mumbai and New Delhi, and Vinitaly China in Shanghai.

**2008** Vinitaly World Tour celebrated 10 years starting off from India in January. In November a there was a stopover in Japan, where the promotional agreement between Veronafiere and Isetan was confirmed until 2010, and then in China, with three stops in Beijing, Shanghai and, for the first time, Macau.

**2009** In November, the Vinitaly World Tour debuted in South Korea.

**2010** Singapore was added to Vinitaly World Tour, which changed

format to become Vinitaly in the World, following an agreement between the Ministry of Agricultural Policies and Veronafiere, which allowed consortiums, associations and individual producers to include in national and regional projects for promotion abroad, partly financed by OCM vino, participation in the stops of Vinitaly in third countries.

**2013** Vinitaly in the World became Vinitaly International. This rebranding further confirmed the role the event plays as ambassador and partner for the development of national business all over the world, by activating a network of solid institutional and business relations.

**2014** Vinitaly International Academy, an educational enterprise created by Vinitaly International, was set up to promote knowledge about Italian wine worldwide. Veronafiere signed a collaboration agreement with Shenzhen Taoshow Culture & Media, a Chinese company of the Pacco Cultural Communication group which deals with promotional strategies in the wine&food sector, for Vinitaly to take part in offsite wine events in Chengdu.

**2015** At Expo Milan 2015, Vinitaly organised the VINO - A Taste of Italy pavilion, the first in the history of the World Fair. It illustrated Italy's winemaking heritage through a cultural and tasting journey, with 3,600 wines. There were over 2.1 million visitors, 20 percent of which from abroad, particularly China.

**2017** In May, Vinitaly went on a mission to Beijing and Shanghai alongside the Italian government to find out more about possible new joint promotional activities within China's 'One Belt One Road' project. The initiative added to already-existing agreements with important Chinese players such as Alibaba, 1919, Cofco and Pacco Group Ltd, as well as the long-standing collaboration with the Shanghai Wine&Dine Festival, the International Wine & Spirits Show

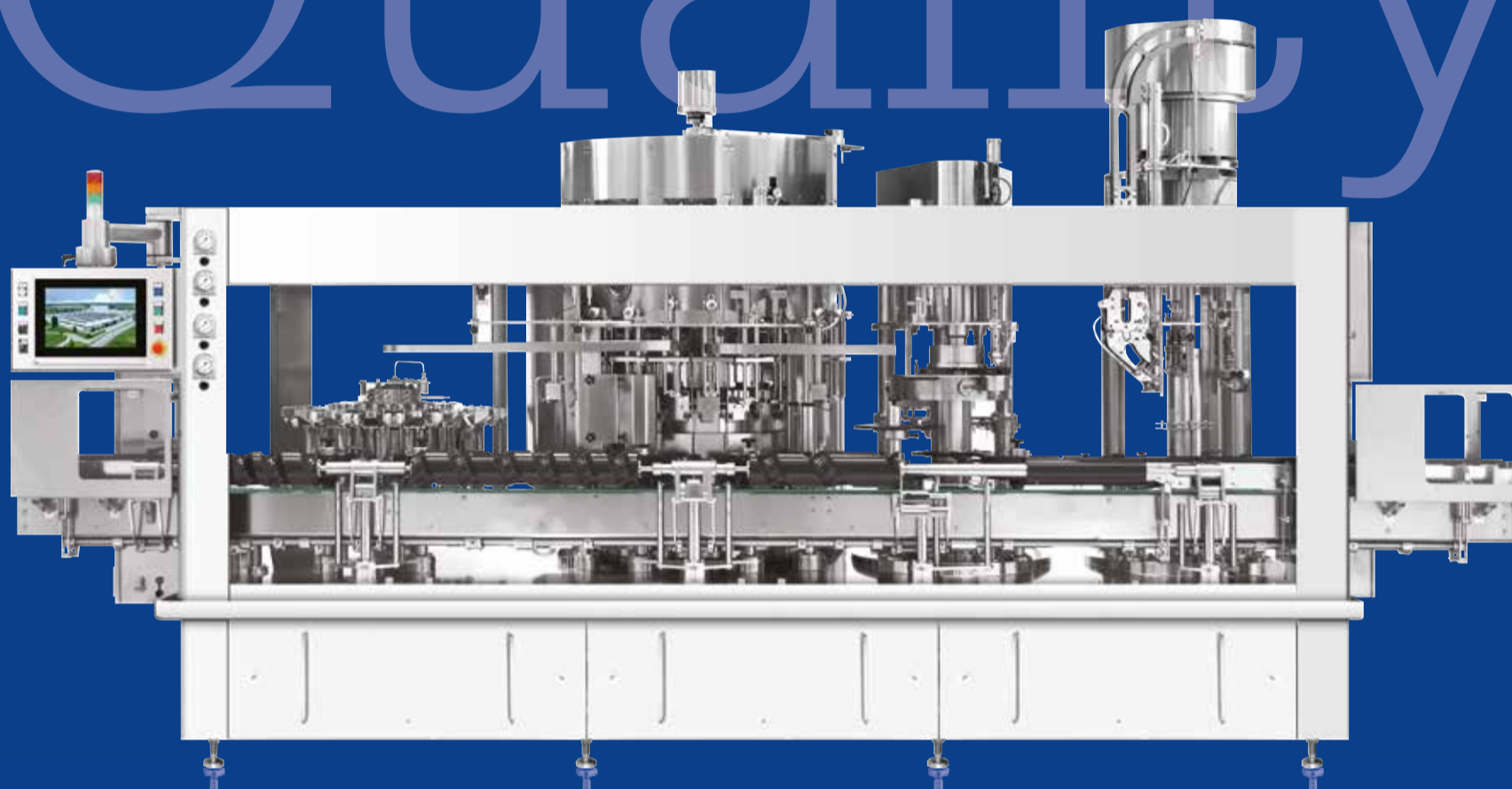
in Chengdu and the Hong Kong International Wine and Spirits Fair. In November, at the Wine & Spirits Fair in Hong Kong, Vinitaly organised the Italian pavilion with 120 wineries.

**2018** In January, VPE (Verona Parma Exhibitions, a newco of Veronafiere-Fiere di Parma) entered at 50% of the shares in "Bellavita Expo", a British company operating in trade shows for the Italian food sector in strategic markets, including Asian ones. In June, Vinitaly International launched a new roadshow in China, stopping at Shenzhen, Changsha and Wuhan, three cities in the southeast of the country, with over 40 million residents. Collaboration with HKTDC (Hong Kong Trade Development Council) was strengthened, where Vinitaly organised the Italian wine and oil pavilion at the International Wine&Spirits Fair. In September, Veronafiere-Vinitaly was at the Western China International Fair in Chengdu, accompanying the "China task force" under the Italian Ministry of Economic Development. In November, Veronafiere officially opened their new Asian office in Shanghai.

**2019** During the 53<sup>rd</sup> edition of Vinitaly, Veronafiere launched Wine To Asia, a new B2B fair to promote Italian wine on Asian markets. It was created through a newco whose joint stock company in Verona is the majority shareholder. The sole partner is Shenzhen Taoshow Culture Media, a company belonging to Pacco Communication Group Ltd. The aim was to further internationalisation in this area of the world, thanks to a stable and privately-owned fair tool which can continuously and effectively communicate with trade. The first edition of Wine 2 Asia is planned for 9-11 November 2020, in Shenzhen, China. In 2019, Vinitaly's B2B roadshow also grew. In June, it covered four Chinese cities (Beijing, Guangzhou, Zhenzhou and Xi'an) and involved over 3,500 professionals. At the same time, Vinitaly launched their MiniApp, which exploits WeChat, the most widespread messaging system in China.



# Quality



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# GAI



A map illustrating the geographical spread of VIA diploma holders: USA, China, Canada and Russia are the countries with the highest concentration of Italian Wine Ambassadors in the world.

#### VINITALY INTERNATIONAL ACADEMY

EXPERTS AND AMBASSADORS 230 PEOPLE 36 COUNTRIES/REGIONS



# The Importance of Educating Italian Wine Ambassadors Throughout the World

Wine is one of the most valuable and sought-after Italian products on international markets. It is also one of the most complex ones. With the designation of an origin system, hundreds of winemaking regions and over 500 native vine varieties registered to date, Italy offers an extremely difficult gamut to understand, to communicate and to be fully appreciated. On account of this, Vinitaly International Academy (VIA) has been on the front line for years in educating real Italian wine ambassadors abroad. These international professional figures are equipped with the right tools to convey Italian wine and promote this excellent Italian product in their own countries. Now, more than ever before, on the threshold of the post-Covid era, VIA is upholding its commitment and faith in the importance of investing in high-level wine education.

VIA was set up in 2014 as a Veronafiere product to increase the educational courses provided. VIA is Vinitaly's educational structure, a benchmark for the promotion of Italian wine all over the world. It offers a complete range of educational courses, organised in progressive and standardised levels, which can provide a solid foundation on the diversity of Italian wine. Since 2014, over 600 professionals have improved their expertise through VIA's courses: 215 have obtained the title of Italian Wine Ambassador, 15 have attained the top-level certificate of Italian Wine Expert. They include Masters of Wine, Master Sommeliers, Head Sommeliers, Wine Educators, journalists, opinion leaders, buyers, importers, distributors, agents and every other kind of figure involved in the wine industry. Over the years, VIA has become the gold standard of education on Italian wine abroad. By involving the main institutes and associations of the Italian wine industry, VIA's ecosystem acts as an intermediary between key players on the Italian wine scene and international professionals.

#### Constantly Evolving

One of the typical features of this institute is its continual evolution. 2018 was a year of great development, starting with the appointment of Professor Attilio Scienza as scientific director, an esteemed professor of viticulture and well-known international expert in the sector. In fact, his experience in the field and his professionalism in developing educational programmes have made the courses VIA offers even more complete and in-depth. In the same year, an improved and enhanced programme was introduced to the Hong Kong edition. Frontal lessons now offer a systematic detailed study of styles, vine varieties and the history and culture of Italian terroirs. Further intensive tasting sessions

*Now, more than ever before, on the threshold of the post-Covid era, Vinitaly International Academy is upholding its commitment and faith in the importance of investing in high-level wine education. In the face of this difficult situation and to adapt to the appropriate safety measures, the concept of the Academy has been digitally redesigned. This has led to the creation of the "Agile" format of the Italian Wine Ambassador course*



The VIA team, made up of Italian Wine Ambassadors from all over the world, with Stevie Kim and Professor Attilio Scienza (centre) during a field trip to Bolgheri at the end of September 2019 (Photo: Michela Viola)

stitute of Wine and Spirits. Davar IWE is a wine educator, master sommelier and boutique fine wine business development manager at Breakthru Beverage, Nevada. He is a food and wine expert, he studied at the American Sommelier Academy and holds the WSET certificate.

#### Support for VIA from the Sector

Vinitaly International Academy enjoys support from the four most important institutions in the Italian wine sector: Unione Italiana Vini (UIV), FederDoc, Federvini and Federazione Italiana Vignaioli Indipendenti (FIVI). Their role, as an advisory board, is to act as an institutional guarantor of the project and to help VIA develop connections between the Italian wine industry and international trade professionals. Alongside it, supporters are recognised as playing a leading and fundamental part in VIA's ecosystem. These include Italian wineries, protection consortiums, administrative regions, private consortiums and Italian business networks. Becoming a VIA supporter allows access to the close-knit network of contacts and the whole community of Italian Wine Ambassadors and Italian Wine Experts. This can also be done by following the course stopovers, either in person or by taking part with your own wines in the tasting laboratories. Furthermore, being a VIA supporter gives you the opportunity to make contacts outlined by profession or origin and already strictly selected by the VIA team. Many wineries have already found these contacts useful as brand ambassadors or for profitable incoming activities. In general, contributing in different ways to the Vinitaly International Academy project means supporting Italian wine on the international market effectively and across the board. Every Italian Wine Ambassador combines a high-level knowledge with an equally in-depth familiarity with their own specific market. Investing in their education is tantamount to gaining available knowledgeable and up-to-date agents able to adopt the right approach to convey the whole value of Italian wine and to attract specific target consumers.

were introduced, partly guided by teachers from the VIA faculty and partly student-led with a walk-around tasting formula. During the course, students have the chance to taste a total of no less than 250-300 wines.

With these innovations, VIA mainly aims to establish itself as a bridge between foreign professionals and the Italian wine industry, encouraging the candidates not only to deepen their knowledge of the product, but also to come to Italy to visit wineries and get direct experience of Italian wine in the place where it is produced. It should be underlined that candidates on VIA courses are highly-selected professionals, already working in their reference market, which is often their country of origin: exposing them to as many Italian wines as possible during the tastings is an added value to the advantage of their education as well as to Italian wineries, which can obtain valuable feedback from those who understand the needs of a specific category of target consumers.

#### "Agile" Format of the Italian Wine Ambassador

For VIA, the desire for change, in order to keep up with the times and to stay alongside the Italian winemaking sector, hasn't stopped during this 2020 marked by Covid-19. In the face of this difficult situation and to adapt to the appropriate safety measures, the concept of the Academy

has been digitally redesigned. This has led to the creation of the "Agile" format of the Italian Wine Ambassador course, which replaced the "flagship" course in Verona, originally planned for April. It is based on an online platform developed specifically by the VIA team to make distance learning courses interactive, which enables "agile" sharing of documents and information. The course is structured in two parts: first the theory, which was held from 8 to 12 June, while the second, i.e. the tastings and exam, will take place on site during wine2wine, in November. Field trips to the territory are also planned for November: students will be taken on visits to winemaking areas and wineries, to experience an all-round full immersion in Italy's winemaking heritage. The same "Agile" format of the course will be set up in the summer, for the 2020 edition of the course in the United States. Instead of the four stops originally planned for the USA, VIA has organised the theoretical part online and at two different times, the first with the East Coast time zone and the second for the West Coast. The tastings and final exam will take place in four cities, Atlanta, Houston, Seattle and Detroit.

As in past editions, the teachers of the Agile Format of VIA's Italian Wine Ambassador course will be Sarah Heller MW and Henry Davar. The former is a wine educator, wine branding expert and owner of Radix + Folium Design. She mostly lives in Hong Kong and is a member of the In-



THE INTERNATIONAL SYMPOSIUM



**SIMEI**

WHAT IS SIMEI?

SIMEI is Italy's International Enological and Bottling Equipment Exhibition. The fair was restructured to become an unquestionable "global" fair of technologies, products and accessories for the winemaking industry. Thanks to a large incoming operation of over 150 operators and producers from the five continents, the 2019 edition of SIMEI opened up to production chains similar to wine, such as oil, craft and other beers, and the vast world of spirits. The fair was held from 19 to 22 November 2019 at Milan Exhibition Centre in Rho.

# WOOD AND WINE. THE NEED FOR A NEW ALLIANCE

In 30 years, we have gone from Parkerization to an almost total Deparkerization. And it's the red wines that have suffered the most. But, ironically, this is a favourable moment. If the boom in "oak-free" wines, like sparkling wines, rosés and whites, has overshadowed them, today there is room for a more rational, almost surgical use of oak and barrels. So much so that some countries are even systemizing their own way of using this technological tool, especially Italy

by CARLO FLAMINI



Niccolò D'Afflitto  
MARCHESI FRESCOBALDI



Paolo Castelletti  
UNIONE ITALIANA VINI



Justin Knock  
MASTER OF WINE



Franco Battistutta  
UNIVERSITY OF UDINE



Gabriele Gorelli  
SOMMELIER



Nicolas Vivas  
RESEARCHER

“We all took drugs,” said **Niccolò D'Afflitto**. “Then we took methadone, we detoxed, and now we are all looking for a better way to use wood to continue making wines with the consensus of consumers all over the world.” In the words of Mr. D'Afflitto, technical director of Marchesi Frescobaldi, we find the most spot-on summary of 30 years of evolution in the global scenario of winemaking. The so-called Parkerization imposed a universal style in the rapport between wood and wine, while the current Deparkerization, with extremists ruling out the use of oak, has become the new dogma (or new drug). It is difficult to interpret what is happening today. Wood is still a tool, described as “essential as salt in food” during the international congress dedicated to wood and wine that took place last December during SIMEI, the International Enological and Bottling Equipment Exhibition. The fair concluded a cycle of studies on the theme launched by Unione Italiana Vini through the *Il Corriere Vinicolo*, called “the year of wood.” But just as too



Barolo, nel legno  
la sua autentica dimensione



HANDLE  
WITH CARE



Dalla botte alla botte  
passando per la barrique

much salt makes a dish inedible, an excessive use of wood to add “aroma” makes the wine difficult to identify. Everyone now professes an almost religious commitment to enhancing the specific nature of terroirs and grape varieties, in order to make wines unique and identifiable as an expression of a territory and/or a winery's trademark. And knowing that you have to handle wood with care has almost become an obsession today.

## Winemaking Style: Two Macrotrends

Introduced by **Paolo Castelletti** (general secretary of the Unione Italiana Vini) and moderated by Master of Wine **Justin Knock** (who conducted a preliminary series of interviews with producers and distributors to try to

systemize the wood-wine relationship in the four corners of the earth), enologists, consultants, researchers and barrel manufacturers took turns to summarize three meetings on the relationship between wood and valorizing the territory, ageing methods and the consumer's perception today. In a nutshell, what emerged from

Mr. Knock's study is that there are two macrotrends in international winemaking styles today: territorial expression and expression of fruit.

“Wood is called on to support one or both of these objectives,” the English Master of Wine explained. “The era of aromatic power is over, at least for great wines, and has been replaced by a search for purity and finesse. As regards choice of format, the classic regions, especially the French ones, continue to use barriques, while others are trying a return to larger formats. The chosen type of oak is even more essential than before, while from a purely winemaking point of view there is a lot of focus on cellar hygiene, temperature and humidity control, in order to obtain controlled ageing, stability and a clean final product.”

After the introduction, Pandora's box literally broke open. Very precise questions led to answers unfolding like a peacock's tail: French or Slavonian oak? Light, medium or heavy toasting? Fine or coarse grain? And then barriques, large barrels or somewhere between the two?

## From Barriques to Large Wood

The barrique used to be the incarnation of the “Parker” phenomenon, and Mr. D'Afflitto

explained how he came to buy 1,300 a year. But in some countries today, especially in Italy, there is an almost cathartic return to the use of large-sized barrels, so much so that at the end of the conference some speculated on an “Italian style,” codified by **Franco Battistutta**, professor of science and food technology at the University of Udine - large wood (on average 50 hectolitres) and necessarily of different origins (Italy not having its own forests), with medium toasting, using small-er containers only for blending. On the other hand, the French style is more geared towards using barriques, also for purely logistical reasons (vicinity to forests) and for space (cellar size, especially in Bourgogne). And then there is the time the wine spends in wood, highlighting another clear distinction between the French school (less time in the barrel and long bottle maturation) and the Italian one (long time in the barrel, but less time in the bottle), and a return to the use of wood (especially vats) for fermentation, in order to keep the aromas clean.

## Climate Change and “Parkerized” Systems. An Explosive Combination

These streams of winemaking thoughts are facing momen-

tous changes in the territory where the vines take root. As pointed out by both **Nicolas Vivas** (researcher in science and wine ageing techniques in wood) and **Lorenzo Landi** (Tuscan winemaker and consultant), climate change has brought the harvest forward by an average of three weeks, which means that grapes ripen with higher temperatures (in summer rather than nearly autumn), at a time when the vine suffers from the worst water stress. And above all, viticultural contexts have been modified during the past 30 years in order to pander to the demands of “Parkerized” consumers, leading to the current high planting density and low yields. The effect of climate change in bringing forward ripening today fits into production methods that were designed to obtain naturally more concentrated grapes yesterday. It is an explosive combination, so that today producers have problems to manage less acidity on the one hand, and the loss of the reducing power of wine on the other, with oxidation processes already in progress in the grapes.

All of this ultimately leads to less resilient wines than in the recent past, which are less able to stand the test of time. Therefore, Mr. Landi underlined, ox-


**Lorenzo Landi**  
ENOLOGIST

**Piero Garbellotto**  
GARBELLOTTO SPA

**Anouck Chapuzet Varron**  
VINEA

**Andrea Lonardi**  
BERTANI DOMAINS

**Stefano Ferrante**  
ZONIN1821

ygation should be reconsidered with caution, inasmuch as it might be appropriate to use wood that releases less oxygen (coarse-grained and/or larger containers), in order to preserve the essential component of final freshness that consumers seem to look for more than anything else. This can be done in the cellar straightaway, but obviously things need to be thought out also in viticultural terms, if it's true that today, as underlined by the winemakers, cellar choices cannot disregard the general plan that embraces (in Mr. D'Afflittio's words) vineyard choices: plant spacing, rootstocks, clone varieties and, before that, soil type, elevation and exposure.

#### Towards Precision Winemaking

Here it comes the division between the Italian, French or Spanish styles. An awareness appears to be emerging for the need to create precision winemaking, like precision viticulture in recent years. According to Mr. Battistutta, choices made on the origin or grain of

the wood are no longer enough. A step forward must be taken to talk about individual woods, individual staves and barrel manufacturers as opposed to forests, as confirmed by the outcome of the meeting on ageing methods, coordinated by **Gabriele Gorelli**, sommelier and professional in visual communication. He particularly stressed the aspect of storing barrels at the winery, already observed by Mr. Vivas. The temperature factor (a limit of 14-15°), as well as humidity and hygiene factors can no longer remain in the background.

"The main goal must be to obtain zero deviations, zero microbiological problems in the wood," he said. "Even more so if the winery uses fewer but larger barrels, not only because the investment is higher, but because the loss of product is measured on higher volumic masses than those of individual barriques."

#### The New Cooperage Profession

If the wine sector is moving towards precision winemaking, the world of barrel making is

moving to codify a "precision artisanship," explained, **Piero Garbellotto**, general manager of the Garbellotto company in Veneto, a historic barrel manufacturer in Italy.

"If, for wine, the concepts of terroir and origin have now been digested," he continued. "For barrel manufacturers, it is necessary to talk of individual plants and microzones where plants grow, whether it's Allier or Slavonia, which have surface areas of thousands of square kilometres. Our company patented a wood spectrophotometer that is able today to identify four main aromatic categories, stave by stave: structure, sweet, spice and balance. We created a veritable wood library, where we catalogue oaks with different aromatic concentrations in the natural maturation process, from the most delicate and sweet to the more robust and intense, to make barrels and barriques that release exactly what the cellar requires." Another innovation comes from the French barrel manufacturer Vinéa, who have patented their "Hydro Ceramic

Toasting" technique.

"Today, toasting is done with fire, whether it is light, medium or high," **Anouck Chapuzet Varron**, general manager of the company and president of the French Association of Master Barrel makers, explained. "And is basically a barbecue just releasing aroma. Ceramic cooking of the oak was created in order to control the caramelization of wood sugars through heat, so smoke is not released to the wood and we obtain a product that is extremely respectful of the fruit and allows the wine to express its primary characteristics, fruit of the terroir." Wineries have a high number of options available today, but obviously the winemaking aim remains central.

"We at Bertani Domains use thought models," said **Andrea Lonardi**, operations director. "That means having a strong identity and presenting it faithfully each year, as if it was always the first time. We learned that Bourgogne, Burgundy and Rioja models exist, so maybe an Italian model exists, too, but within these

general plans wineries just enhance their own models, otherwise we would have carbon copy wines."

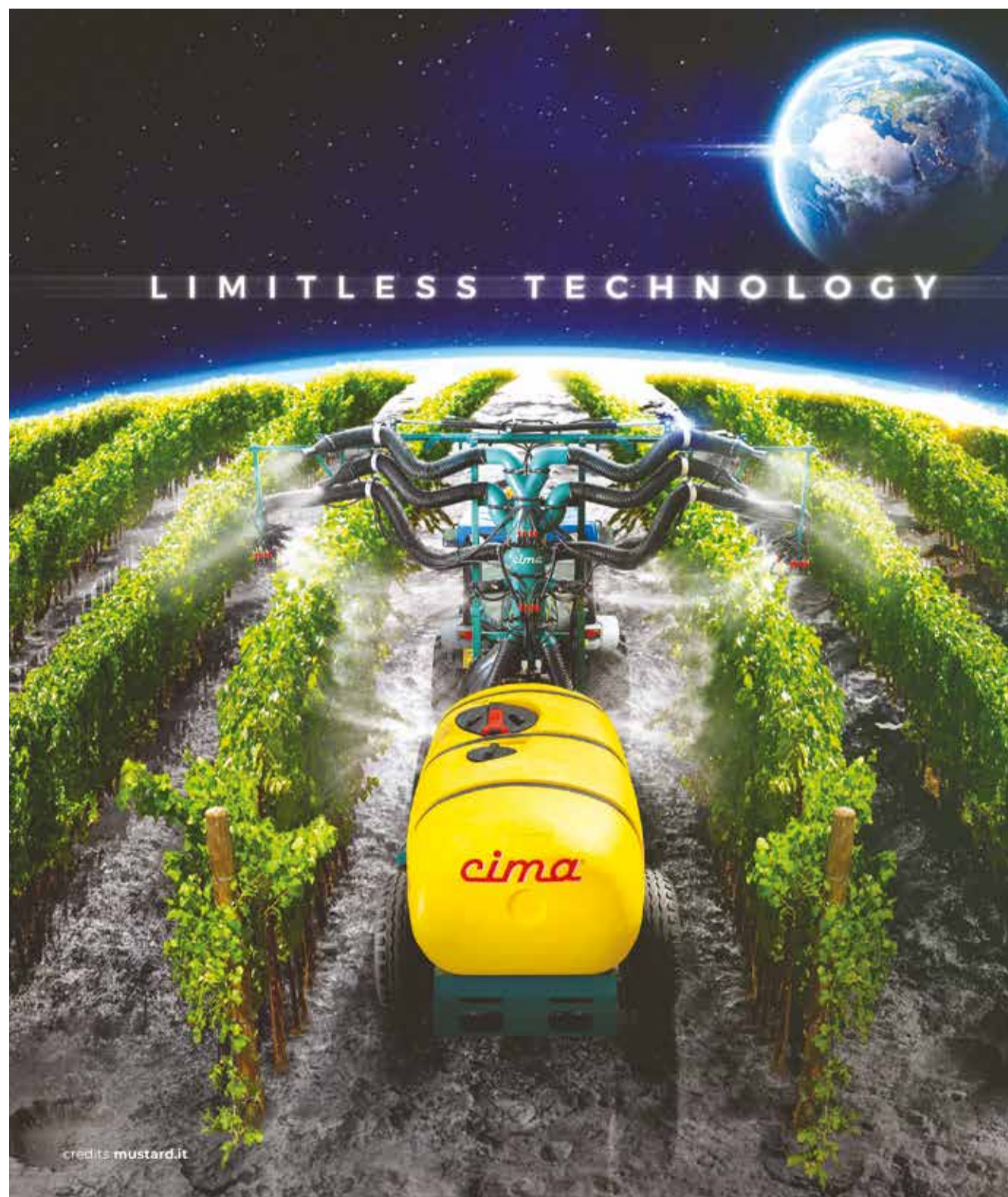
#### Contradictions of the Consumer

Up to this point, the discussion remained in the cellar. But the ever-present spectre is the end consumer, whose buying models appear difficult to codify. As a result of the meeting on identifying trends in progress, coordinated by Justin Knock, attended by journalists from all over the world, it was acknowledged that there is a strong contradiction between what the consumer claims to appreciate and what they then go out and buy.

"Outside of the wood discussion and talking about Prosecco, for instance," said **Stefano Ferrante**, technical director of Zonin1821. "We are sometimes surprised by the fact that the consumer seems to prefer the brut version, or even *pas dosé*, but then the dry and extra dry versions perform better in terms of sales. It's the same for wood. It's true there is a

high segment that appears to tend towards wines where you can't taste the wood, but underneath there is a vast public that say they don't want wood aromas, who turn their nose up at a wine that hasn't had wood contact. It is a sign that their mind is ready for change, but not their palate."

It is a sign of the times in which we live, and of the post-Parker period, also in the face of consumption. Gurus that lead the way today don't have the same hold on "people," who found shorter and more democratic ways to form an opinion and to build their own personal relationship with wine - apps, social media, wine clubs. It's true that everything that exercises an influence over the consumer today (from Prosecco-style sparkling wines, to fresh, fruity whites and Provençal rosés) sees neither hide nor hair of wood. Reds are experiencing that open-ended phase of general "negligence," while waiting for a new revival. And who knows whether the resurrection might not go through a new alliance with oak.



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## AN ORIGINAL VIEW OF NEW DISTRIBUTION SCENARIOS WITH THE KEARNEY EXPERTS

*The impact of Covid has shifted balances and opened new prospects for logistics and distribution. This is the moment for wineries to identify the needs of modern consumers by focusing on the omnichannel approach. From “Islandization” to “Globalization”. In an interview with the Corriere Vinicolo, Emanuele Savona and Luca Rossi illustrate the main trends to look out for*

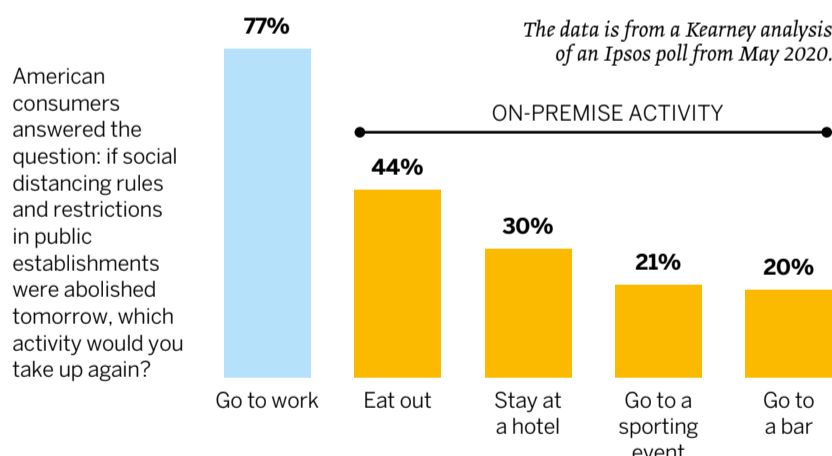
by GIULIO SOMMA and CARLO FLAMINI

**T**he revolutionary impact of Covid-19 has not just had direct consequences on wineries' revenue accounts, hit by the sudden drop in exports and the zeroing of the HORECA and wine tourism sectors, nor has it simply caused an increase in revenue for large distribution chains and online players who were already geared to e-commerce, inducing those who lagged behind to undertake the road to the internet. The most disruptive force of the pandemic, combined with the long, forced lockdown in most countries, has brought to light certain weaknesses in the wine distribution chain, considering the absence- and lack of faith- of entrepreneurs in that kind of sales method that suggests a direct rapport with the consumer. With on-trade out of the game, most wineries needed to intercept clients and reach them directly in the comfort of their own home. And it needed to be done quickly, through product distribution methods which many had never had anything to do with before.

The hard lesson of Covid brought to light the need for an intelligent integration of the physical dimension with the digital one, based on an approach that many large firms are implementing - and not just in the wine sector. Today's imperative is to build networks on different levels which allow action to be combined with information, in order to meet the needs of ever-more educated and loyal consumers, with buying dynamics that respond to the rationale behind multiple buying channels (physical, online, mobile), delivery (home, shop, lockers), speed (same day delivery) and a wide range of products.

In a word, today's imperative is the omnichannel approach.

### The impact of Covid-19 on the on-premise market will be deep-reaching and of long duration



### Post-Covid Retail

So how will post-Covid retail change? How is it changing in the food and wine sector? Will we have to wait for long-term structural changes? And how should distribution be remodelled to the new needs of consumers? Luca Rossi and Emanuele Savona, respectively Senior Partner of Consumer and Retail and Principal of Consumer and Retail at Kearney (global management consulting firm offering consumer consultancy in over 40 countries), attempted to answer these questions during a round table meeting-cum-interview promoted by the *Corriere Vinicolo*. In a recent study on world retail, Kearney predicted great changes in the sector following the general economic crisis. Among them were the acceleration of the current decline in retail sales (which have been under pressure for years to try to intercept digital natives and companies selling online), changes in consumer behaviour and liquidity problems following forced shop closures, the probable failure of retailers who do not have experience in selling online, the chance for digital players to open showrooms or sales outlets, and an increase in experiential stores. Though not specific to the wine world, these indications may be useful to highlight the development of some macro-trends that will inevitably have to be taken into account. According to **Luca Rossi**, the grocery sector in Italy is still living in a primitive direct-to-consumer phase.

From the top, Luca Rossi and Emanuele Savona.



### KEARNEY AT A GLANCE

Kearney is a global partnership working in over **40 countries**, with over **3,600 employees**. The firm offers **consulting** to three quarters of the Fortune Global 500 companies. It works **in Italy** with over **100 people** and supports clients in various sectors, with particular focus on production and distribution of consumer goods.

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"Apart from a few brands, such as Amazon or Esselunga, we notice the limits of important chains that offer click-and-collect services with limited territorial coverage," he said. "For an individual producer, the difficulty of setting up a direct-to-consumer system depends on the amount of investment needed to build up an efficient service. Therefore, with a limited portfolio of brands, with average receipts and consequently a limited investment capacity, the solution could be to join together with other individuals with a complementary range of goods."

Making a platform available to consumers would lead to improved third-party services and create a more easily sustainable context from an investment point of view and average revenue.

"It also shouldn't be forgotten that it would establish a direct relationship with consumers," Mr. Rossi underlined. "While also managing to set up a database with valuable information for creating a more tailored product range, which can earn further revenue either through publicity or by making the said database available to third parties."

#### B2B Platforms

As Emanuele Savona pointed out, the impact of the digital age on retailers' sales methods goes beyond the current moment of the Covid-19 pandemic, though the economic crisis has undoubtedly accelerated this trend.

"Particularly in the B2B sector, the use of digital channels for restocking goods and managing sales continues to gain ground," the expert explained. "Basically, for what is defined as 'small trade' (which could be similar to wine shop trade in Italy), in more advanced markets there is an increase in requests from clients to find digital applications that integrate, supersede and replace the role of classic sales agents. What do we mean? Some large brands in the soft drinks sector are experimenting with applications that refer to platforms where the user's buying experience approaches that of an Amazon-style platform. Therefore, not only do they buy a product with personalised offers for individual sales outlets, but they can also track the order in real time by viewing the vehicle that is about to deliver the product on a geographical map."

This is an important step forward, according to Kearney's Principal, seeing as it opens the way to a whole series of developments for a wine shop, for example the creation of a community of wine shop owners where they can exchange information and experiences about the wines they buy; but also the chance to open up to partners who supply accessory services and materials for tastings and experiences linked to food.

"Therefore, starting with the product and then expanding to create a platform," Mr. Savona observed. "That aims to increase average spending on the platform itself, where it is essential to combine visit frequency, thus creating continuous purchase occasions, with engagement between people who have the same interests."

An illuminating example is Clos19, a platform of web shops set up in 2017 by the giant LVMH, where the simple sale of the product is offered together with that of related experiences.

#### Integrate Physical and Digital

The integration of the physical dimension with the digital one has led to the American distributor Southern Wines successfully developing so-called one-to-one marketing, along the same lines as Gruppo Meregalli in Italy, with the creation of an e-shop for HORECA professionals.

"Thanks to digitalization and the intelligent gathering of infor-

mation and data about orders and traffic arriving from the website, it is possible to profile the individual user," Mr. Savona underlined. "Furthermore, such an amount of data allows us to strengthen the role of sales agents, inasmuch as the distributor can recommend the agent a tailored range for their client, which could be a wine shop or a wine bar, on the basis of the information gathered through physical and online orders. In fact, the parent company has a whole series of data at their disposal and, by means of a specialised infrastructure and data analytics skills, is able to guide their client towards certain wines and products rather than others, through so-called prescriptive selling."

#### Complementarity

The use of a virtual shop that manages to supply and sell an all-round experience can be exploited by groups of wine companies that want to grow by operating with neighbouring sectors.

"The French of LVMH sell both their wine and whole journey packages with experiences in the cellar," Mr. Savona observed. "In my opinion, if we then shift towards categories that are not in the luxury goods sector, this strategy could be applied by wine and food consortiums to recommend products and event packages linked to their area and elsewhere. The advantage of joining forces would also have an impact on customer acquisition and logistics costs, which are often unsustainable for an individual company. Therefore, the wine entrepreneur must exploit the great potential of virtual channels in order to make direct contact with consumers. And collaboration between similar and complementary sectors, or through associations like consortiums, is one of the paths that offers most opportunities for success these days,

both in terms of integration and improving the range on offer, as well as sharing investment risks and burden."

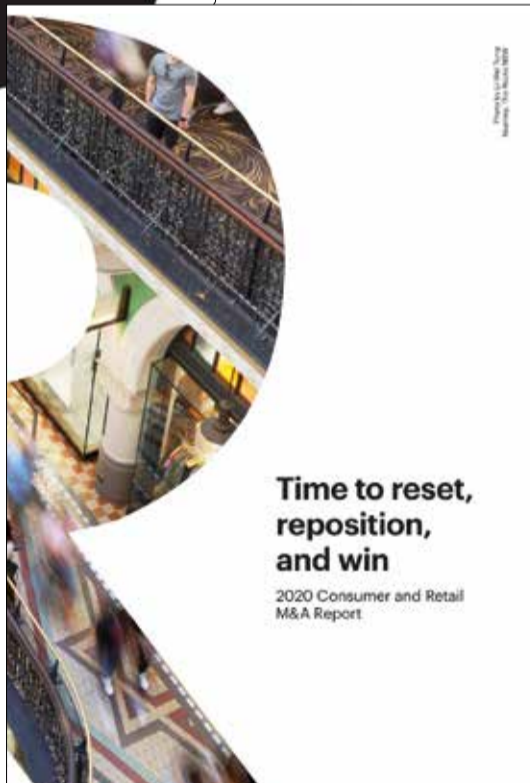
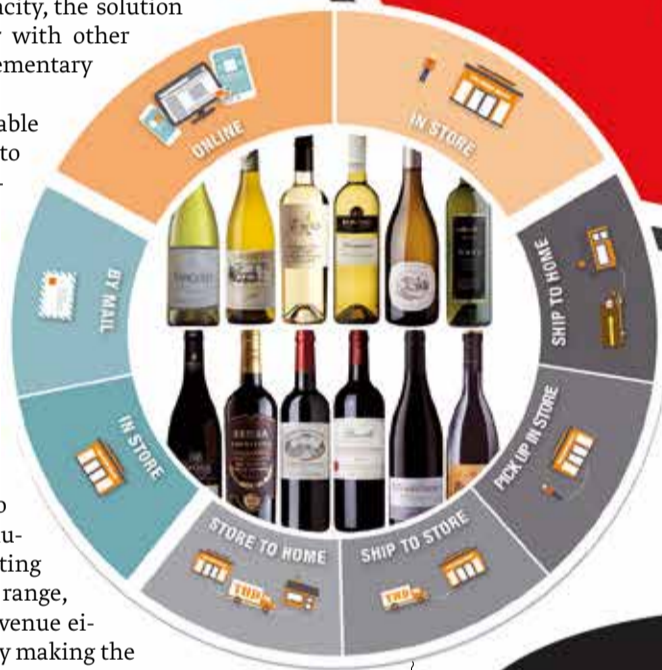
#### Same-day Delivery

The rationale behind same-day delivery, which Amazon were pioneers of, has now become almost intrinsic to the online buying dynamics of consumers.

"I believe that Amazon is strongly imposing the same-day delivery service on the whole industrial world," Mr. Savona said. "Even the consumer is now used to being served the same day they place an order. Therefore, anyone moving towards this service must bear very high standards in mind. I.e. the organization of a widespread distribution system throughout the area by creating small agile distribution centres that favour rapid delivery of goods."

But wine is a product that needs to be explained, so could the online buying trend risk anonymisation of the product and a clear reduction in the emotional aspect of the buying experience for the consumer?

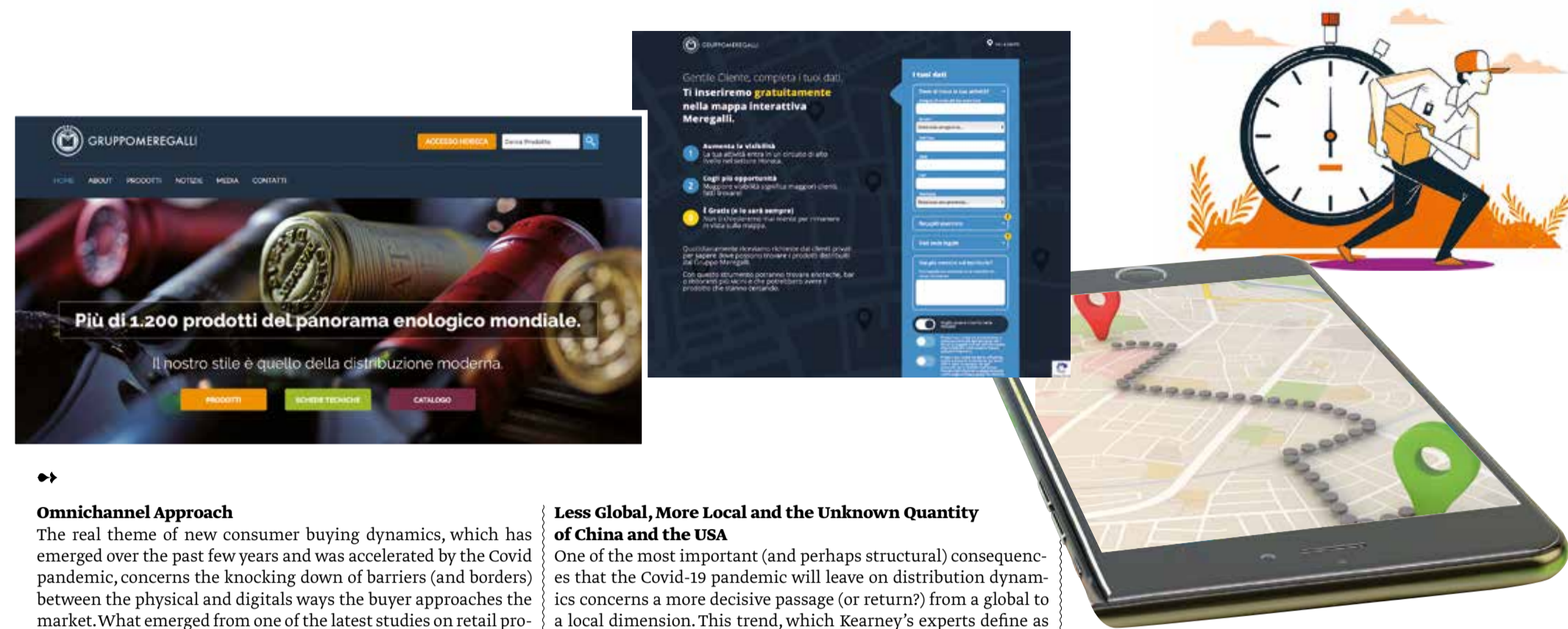
"In this case what counts is the producer's ability to talk about their product on digital channels," Mr. Savona recalled. "For instance, the Tannico company has managed to build up a good story around the wines and spirits it sells. These are stories that meet the needs of different customers' awareness. Therefore, I believe that the theme of storytelling is fundamental for sales when it comes to products like wine and can be satisfied with a good digital project."



#### "TIME TO RESET, REPOSITION, AND WIN", THE CONCLUSIONS OF THE REPORT

100 international managers from the consumer and retail sector were consulted by Kearney during the lockdown period, through the study "Time to reset, reposition, and win" – 2020 Consumer and Retail M&A report. The answers on the business prospects and strategies necessary to face the economic crisis have highlighted three macro-trends:

1. Retailers who have not adopted efficient omnichannel solutions and a differentiated experience for consumers (also online) will face a stabilization of business or failure.
2. Consumer goods companies will opt for acquisitions of smaller entities, in order to develop supply chain models that are more adaptable and flexible, shifting from globalization to "Islandization": from global to local.
3. Investors will be more cautious when looking for business, putting into play financial reserves mainly in moments of economic difficulty. And they will also be more attentive to quality.



**Omnichannel Approach**

The real theme of new consumer buying dynamics, which has emerged over the past few years and was accelerated by the Covid pandemic, concerns the knocking down of barriers (and borders) between the physical and digital ways the buyer approaches the market. What emerged from one of the latest studies on retail promoted by Kearney, “Time to reset, reposition, and win”, which involved over 100 important international managers from the sector (see box), was an increased interest towards the digital world and a more rapid merging between consumer goods and online services, with an increase in offers that companies aim at consumers. These data would appear to outline a clear trend towards reshaping the physical buying experience of the user.

“The theme of the omnichannel approach is opening up for companies, creating a buying experience,” Luca Rossi explained. “That is more linear, more integrated and enjoyable through both channels: physical and online. It is certainly clear that limiting yourself to the physical channel is no longer enough, but also limiting yourself only to the online one could prove reductive, especially for a product like wine, where direct experience, tasting, storytelling and the social aspect that revolve around it are important and decisive. Therefore, winemaking companies looking towards the future will need to be prepared to arrange an efficient and effective omnichannel approach which offers the consumer the chance to choose how, where and when to try to buy the product.”

**Less Global, More Local and the Unknown Quantity of China and the USA**

One of the most important (and perhaps structural) consequences that the Covid-19 pandemic will leave on distribution dynamics concerns a more decisive passage (or return?) from a global to a local dimension. This trend, which Kearney’s experts define as “Islandization”, will force companies to react and plan their marketing strategies accordingly. The proliferation of the pandemic, combined with macroeconomic uncertainties, accelerated this defensive attitude of many cultures and countries, leading to an increase in nationalism and protectionism, both on an industrial and a consumption level, with the population rethinking their preferences towards local services and goods. According to Kearney’s experts, the trend could be around for a long time.

“This change of heart about global supply chains, which Islandization depends on is due to two phenomena,” Mr. Rossi observed. “The first is the emergence of solid commercial barriers powered by the war between the United States and China; the second is linked to the fact that Covid-19 interrupted the restocking chain to the Far East for some months, enough to induce companies to address the issue of how to strengthen the supply chain. The outcome is a kind of ‘repatriation of production supply chains’, a rapprochement towards Europe or Italy and, at the same time, an emphasis on local consumption. The consumer also interprets and experiences this action emotionally, according to the idea of local to local, as a way of supporting their own economy

which is in difficulty due to the pandemic.”

Whether this specific trend overcomes the post-Covid phase and strengthens itself over time, a lot will depend on geopolitical developments, but also on the possibility of new spikes of Coronavirus. The question is a must for Italian wine in particular, whose number one client is the United States, while China eternally promised future development.

“I believe that the breakup of international relations between the United States and China will go far beyond any new presidential election, whoever the new president may be,” Mr. Savona said. “However, even Biden, Trump’s rival in the race to the White House, has not taken a soft line with the Chinese. Therefore, we will see a profound change of mind about geopolitical balances.” But it won’t just be the United States who want to cut close ties with China: Europe will follow suit too.

The first signs are arriving loud and clear of intolerance towards embracing what the Old World’s industry is starting to view as dangerous, with an economy like the Chinese one, motivated too much by a ‘take-it-all’ attitude.

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WINE INTELLIGENCE'S ANALYSIS IN DIFFERENT AREAS OF THE WORLD

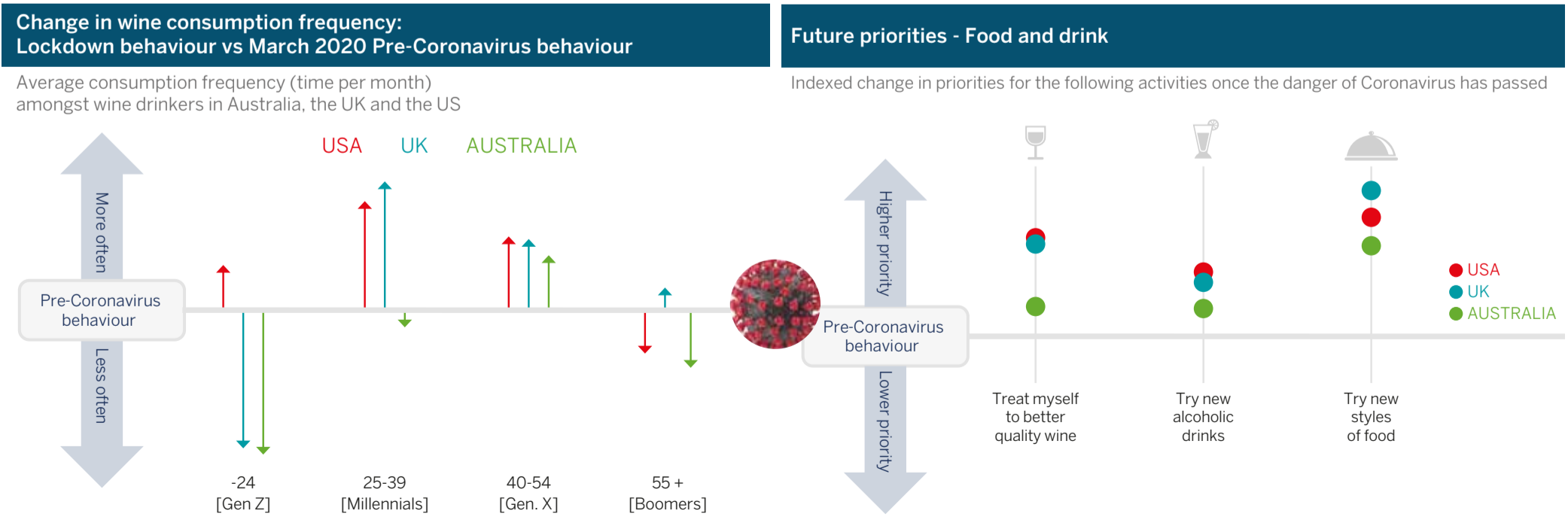
Australia, the United States, the United Kingdom, Canada and South Korea: different reactions to lockdown and different recoveries for each country. The role of the young Gen Z and Millennial generations. The accomplishments of e-commerce and the importance of branding in the consumer's imagination

by PIERPAOLO PENCO - Wine Intelligence's Country Manager for Italy

In recent weeks, Wine Intelligence has published various reports on the behaviour of consumers and their attitudes towards wine during the Covid-19 pandemic, as part of a study covering 12 market research activities that will continue over the following months. The first three reports focus on the main English-speaking wine markets on a global level- Australia, the United States and the United Kingdom. Comparing the three markets, we looked for models of how consumers were responding to the various forms of lockdown and to the different rates of coronavirus infection in each market. Despite differences in contagion rates and responses from the different governments, at first glance, behaviour and trends seemed remarkably coherent. Overall, wine consumers remained closely linked to it, changing the volumes of on-premise consumption into increased spending on take-away wine, and finding new occasions to taste a glass of wine (online chats with friends and family, pre-dinner drinks). Before the lockdown, our data showed a long-term growth trend in the number of occasions for drinking wine in all three areas of the market. The measures and restrictions put in place due to the virus caused similar reactions among consumers. In the United States and the United Kingdom, people drink more often, while the Australians have maintained stable consumption levels. But in all the markets, more informal occasions to drink at home (like phone calls or video calls with family and friends, or between meals) are making up for the closure of restaurants, bars and pubs. However, while the models generally seem to be similar, at a closer examination, the factors behind these behaviour and attitudes are very different. Young adult consumers under the age of 25, also known as Gen Z, rarely drank wine before lockdown. In the United Kingdom and Australia, the pandemic further reduced their connection with wine, probably because beforehand wine was associated with public and social events in their lives. Nevertheless, in the United States, the Gen Z are drinking a little more often, probably because they eat more inside their homes. In the United States and the United Kingdom, young people between 25 and 39 (widely known as Millennials) are the ones who mainly increased their wine consumption frequency. They tend to drink wine when they catch up with friends and family online, or between meals during the day, more than other age groups. However, the Australian Millennials did not change the overall frequency with which they



Between Brands and E-commerce How Wine Is Resisting The Tide of Covid

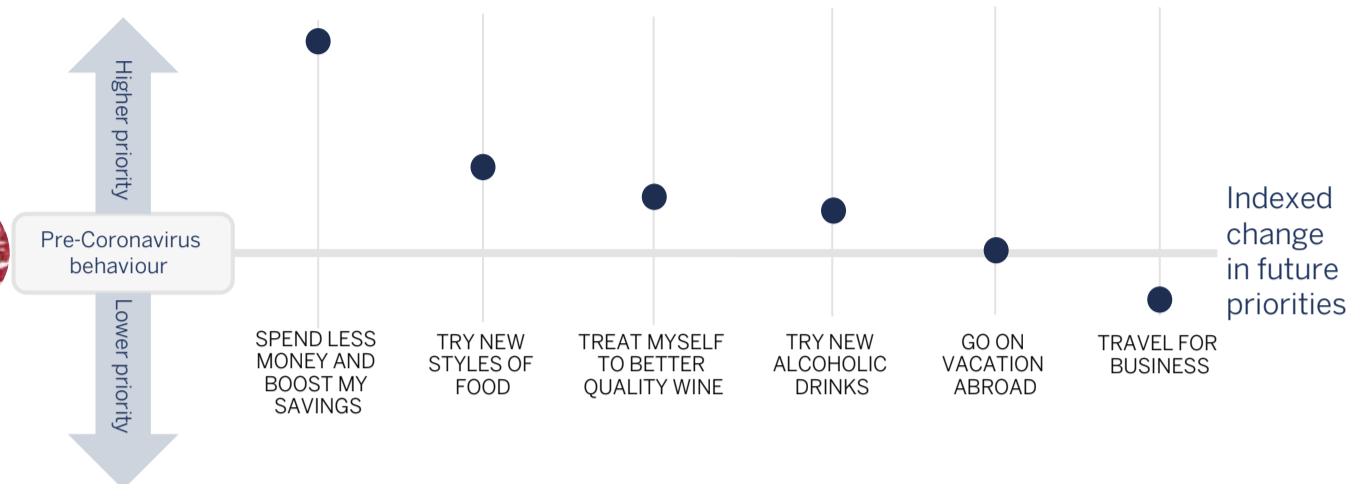


Source: Wine Intelligence Vinitrac® Global, Mar '20 (23<sup>rd</sup> March 2020 – 16<sup>th</sup> April 2020), n>=1,000 regular wine drinkers in each market

wine  
intelligence

Canadian wine consumers anticipate focusing more on both saving while indulging in treats such as trying new styles of food and treating themselves to better quality wine

Indexed change in priorities for the following activities once the danger of Coronavirus has passed



Source: Wine Intelligence Vinitrac® Canada, Mar '20 (31<sup>st</sup> March 2020 – 20<sup>th</sup> April 2020), n=2,395 Canadian regular wine drinkers

ers, both in the United Kingdom and Australia, while American boomers seemed to be more cautious about spending during lockdown.

It is reassuring for the wine sector to see that, although wine drinkers in all the markets are rather cautious about their future buying behaviour (a bit more in the United Kingdom and the United States), wine still seems to be at the top of their priority list. In all markets going on holiday and air travel are really not on the agenda in the near future. But when restrictions are lifted, wine drinkers (especially the young Gen Z and Millennial generations) seem to give more priority to satisfying their need to experiment and treat themselves, and try new foods or better quality wine.

#### Focus on Canada

According to another recent study published by Wine Intelligence, the monthly Canadian consumer population slowed down their spending on wine during lockdown, since the various opportunities to drink at typical social occasions were drastically reduced. According to the "Canada Covid-19 Impact" report, when restrictions were in place, most of the Canadians interviewed in a national survey of 1000 monthly wine consumers in April 2020, they claimed they had reduced the amount of money they spent per bottle of wine.

Spending per bottle in Canada has been increasing for some years now. In the same survey, 25 percent of Canadians (compared to 21 percent in March 2019) stated that in normal conditions they would spend more than 16 Canadian Dollars for a bottle of wine for an informal occasion, while 51 percent said they would spend over 16 Canadian Dollars for formal or social occasions (49 percent the previous year). Unlike other markets like the United States, where the restrictions provoked a steep rise in volume of wine purchased, Canadian consumers said they hadn't significantly altered the quantity of bottles they bought to drink at home. However, the study showed that Canadians maintained the total number of occasions for drinking wine. These results suggested that wine previously consumed in restaurants has been replaced by further purchases in supermarkets, wine bars and liquor stores.

When asked about their intentions once restrictions were lifted, regular Canadian wine consumers seem, on the whole, quite reluctant to commit themselves to social activities outside home, at least in the short term. When allowed, 39 percent of those interviewed claimed that they will probably go to restaurants less than before lockdown, while 42 percent will be less likely to go to bars. The data from Canada demonstrates how Coronavirus had very different impacts on attitudes and behaviour. Like many other wine markets, before the global pandemic the population of regular Canadian drinkers was precarious. And while the quantity of wine drunk wasn't increasing, they tended to spend more money on the wine they bought, enjoying it on more formal and social occasions, at home or in restaurants. The Coronavirus pandemic, predictably, interrupted this trend. As we wrote, with restrictions in place and many social activities not possible, Canadians widely maintained the quantity of

drink wine, although they also enthusiastically adopted these new occasions.

The main differences can probably be found between the older consumers in each market. The boomers reacted differently depending on their national situation. Although there have been no great changes in the United Kingdom, they drink less frequently in the United States and Australia. While in the United States they are less likely to drink wine on different kinds of occasions, the boomers in the United Kingdom and Australia drink more often during lunch and dinner than other age brackets, but not so often between meals. Gen X (40-54) is the only generational segment that showed coherent behaviour in all markets. Before the lockdown measures were put in place, they were the second segment in terms of highest wine-drinking frequency - the most widespread also in the United States - and now during lockdown they coherently drink wine on more occasions on all the markets examined.

While drinking frequency shows some variations, we observed a constant trend in all the markets (except for China): spending is going down. This phenomenon is mainly due to the Gen Z consum-



still wine they buy, but reduced sparkling wines and spirits at the same time, and spent more on a bottle of wine for all occasions.

Thinking about the future, regular Canadian consumers are very wary about returning to their old social lives. Unlike other markets, where younger consumers are forcing themselves to get back to their old habits, young Canadians share the same reluctance as the older age groups to go out and meet other people at bars, restaurants and events. The Canadian catering and away-from-home consumption sector may have to wait longer than other countries to see business volumes return to serious levels. The on-premise channel in Canada would not appear to be very lucky, then.

Does wine drinkers' reluctance to start socialising in bars and restaurants again represent a significant check to post-pandemic recovery in the wine sector? Perhaps it could halt, at least temporarily, the ten-year trend in Canada towards buying more expensive, interesting and ambitious wines. Therefore, bars and restaurants (and the companies that rely on these channels) will have to make more of an effort to engage their historic or loyal client base again, in order to fill their tables once Coronavirus restrictions are lifted.

#### Focus on South Korea

In contrast to the English-speaking markets illustrated above, South Korea must be one of the few countries that can be said to have had a "positive" viral experience. The lack of negative impact on people's daily lives is clear from the data of our recently published report on the impact of Covid-19. As opposed to the USA, the United Kingdom, Australia or Canada, the Koreans seem to have approached the pandemic in their own way. Almost two thirds of consumers of imported wine claimed they wanted to go back to restaurants as soon as allowed. In addition, consumers in this market seem less worried about boarding a plane or going to the cinema, again in clear contrast to the English speakers.

However, the resurgence of the virus and the relative restrictions have led to wine drinkers reducing their consumption. While the Americans and Canadians have continued to drink wine (although spending less per bottle) during the pandemic the Koreans bought less wine and spent less per bottle. This thriftiness is coherent among the different groups of age, sex and even level of interest; very interested wine lovers slightly increased their consumption but significantly reduced how much they spent per bottle. A factor that would explain this lack of drive for wine sales during the pandemic is the absence of the internet when making purchases. Unlike other markets, South Korea does not have an available channel for online wine sales that works, since it is still banned by government legislation. The prospect of having to physically buy wine in a shop (together with daily necessities like food and drink) may have reduced the temptation to treat themselves to an extra purchase of wine.

Assuming there are no second spikes of the virus, in the next few months the South Korean wine market is likely to make a rapid recovery from the March-April depression, particularly the on-trade channel. This should lead to a positive development for producers who have been successful over the years on the market and provide interesting prospects on other markets, where public health measures have been more effective.



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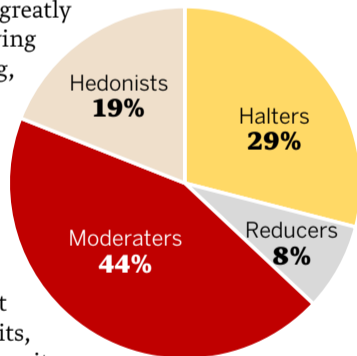


**"CHINA  
COVID-19  
IMPACT  
REPORT"**

by CARLO FLAMINI

What will the post-Covid Chinese consumer be like? Wine Intelligence mapped out attitudes towards wine in its "China Covid-19 Impact Report", hot off the press. Focusing on consumers of imported products, living in first-, second- and third-tier cities (a total of about 50 million people), the report suggests that more than half of the sample will not substantially change their habits. In fact, in some cases, Covid will drive them to experiment more with new methods of consumption and to abandon old models. But around 40 percent claimed that the pandemic has changed not only the way they approach drinking wine, but the way they live, undermining their tendency to sociability, travel and experiences. In short, remixing the order of their priorities.

Let's start from the latter, who are about 30 percent of the total (defined as "Halters", those who stop, **Figure 1**). Belonging horizontally to all age brackets, they state they are no longer going to restaurants, parties or events, because their priority is to save money now. They will mainly reduce their consumption of spirits and will buy more bottled mineral water, for a question of food safety. They will also reduce wine consumption, avoiding special occasions for consumption. They will buy less wine from the supermarket and more and more online. Another 8 percent are even more drastic. Wine Intelligence defined them as "Reducers." They belong to the younger age bracket, live in first-tier cities, and will only drink wine at home, without food, while before they were regular restaurant-goers and "social animals." They will attend very few events and will stop going to the gym, partly because they are not allowed to. They will also greatly increase their online buying and curtail trivial spending, including holidays abroad. Then we come to the "neutral" consumers ("Moderators"). They make up the vast majority (44 percent) and live in second- and third-tier cities. They say they want to return to pre-Covid habits, but these weren't exactly exciting: little social life, occasionally eating in restaurants, infrequent flyers. Despite this complex behaviour, they claim they want to treat themselves more to wine, maybe passing up beer or spirits and buying mainly from the supermarket. Four out of ten say that foreign travel has become a priority.



**1. CATEGORIES OF CONSUMERS**

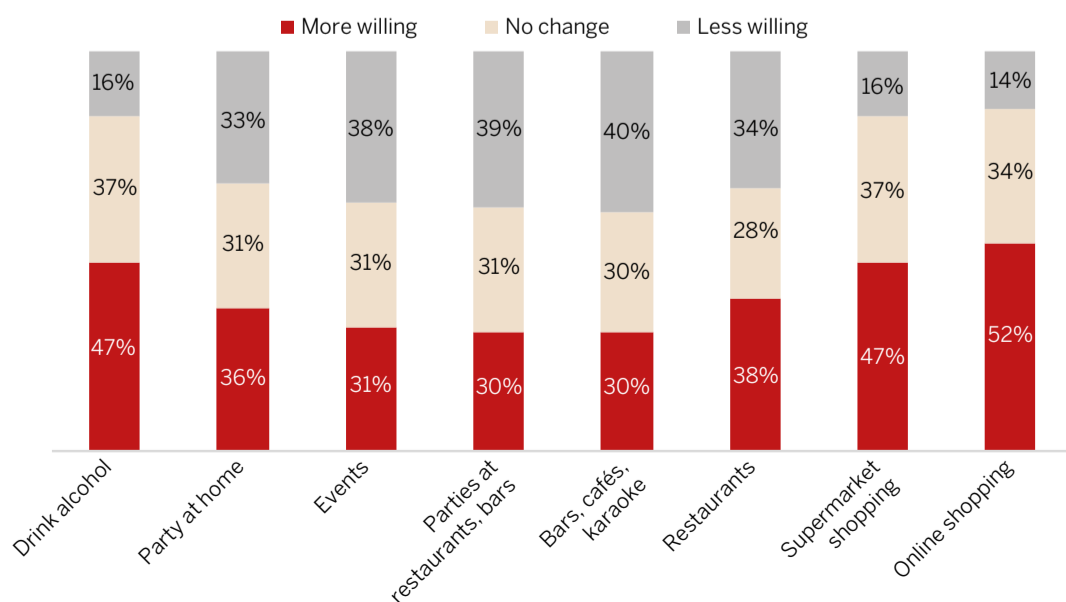


No dramatic forecasts. More attention to saving money, less social life, but indulging themselves every now and then. A more watchful eye on everything healthy

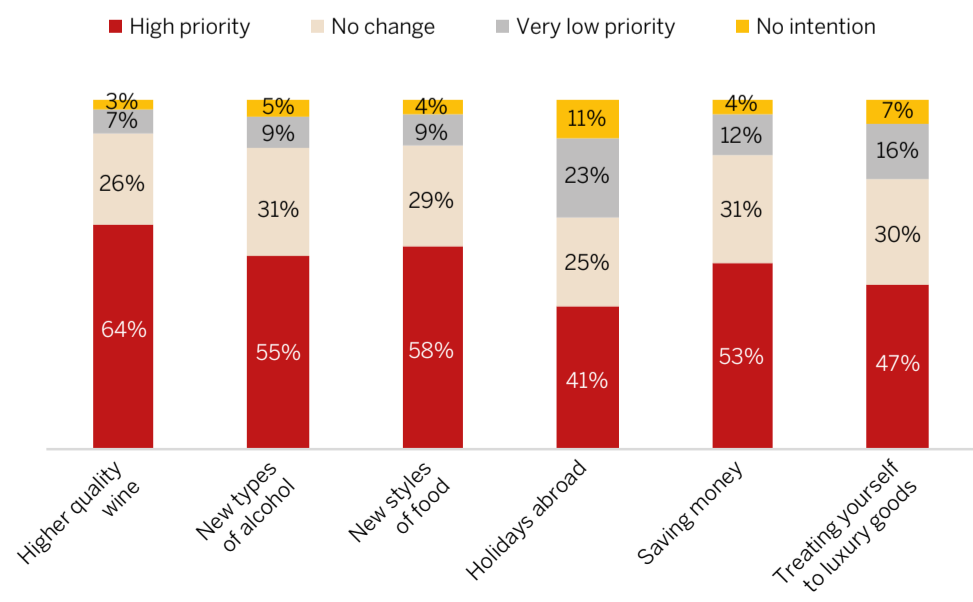
# The Wine Consumer? (MAYBE) A CHANGE FOR THE BETTER



## 2. THE EFFECTS OF COVID ON BEHAVIOUR



## 3. POST-COVID PRIORITIES



## New Priorities

A significant segment, about 20 percent, is defined by Wine Intelligence as "hedonists": a great increase in consumption and spending on wine, especially for non-food occasions, no cuts in spending, nor for other types of alcohol either. In the post-Covid era, their priorities will be travel and luxury goods, more social life, restaurants, events and holidays.

Wine Intelligence described a greyish prospect for a country that, in addition to the pandemic, experienced a dramatic lockdown and a total halt of industrial activity. It is no coincidence that one of the most common answers was "to save money", as well as health, represented by the consumption of bottled mineral water, the partial or total abandoning of spirits in favour of wine, seen as a more healthy element, and from the increased tendency to buy online, which was already very widespread in the country. Reassembling the scenario, the most affected types of behaviour are those in the social setting (**Figure 2**). About 40 percent of wine consumers claim they will go to fewer events and parties at restaurants and bars, as well as generally going less to these places, while more will increase domestic spending on traditional channels and even more so online (half answered to the positive). For alcohol consumption, a good half of the sample declare they will continue or increase their habits, associated with a higher tendency to have parties at home, where knowing and controlling people is a determining factor. On priorities (**Figure 3**), it would appear that the pandemic has seriously affected the concept of quality, meaning food safety and therefore health. Two thirds of consumers claimed they intended to treat themselves to better wines than before the Covid pandemic, and a good half wanted to experiment new things, both for drinks and food. Travel is limited, especially abroad, which could affect the experiential side of getting to know winemaking regions, while divisions in social class can be seen in the relationship with money. Fiftythree percent indicated that saving money was an absolute priority, but on the other hand, 47 percent claimed they wanted to treat themselves to luxury goods.



# VINEYARD & CLIMATE CHANGE

The 2020 investigation-topic of *Il Corriere Vinicolo* is dedicated to climate change in the vineyard and cellar. In the following pages, a focus on **CANOPY MANAGEMENT**

## TOWARDS NEW PLANT WALL ARCHITECTURE

by CLEMENTINA PALESE



MARCO SIMONIT

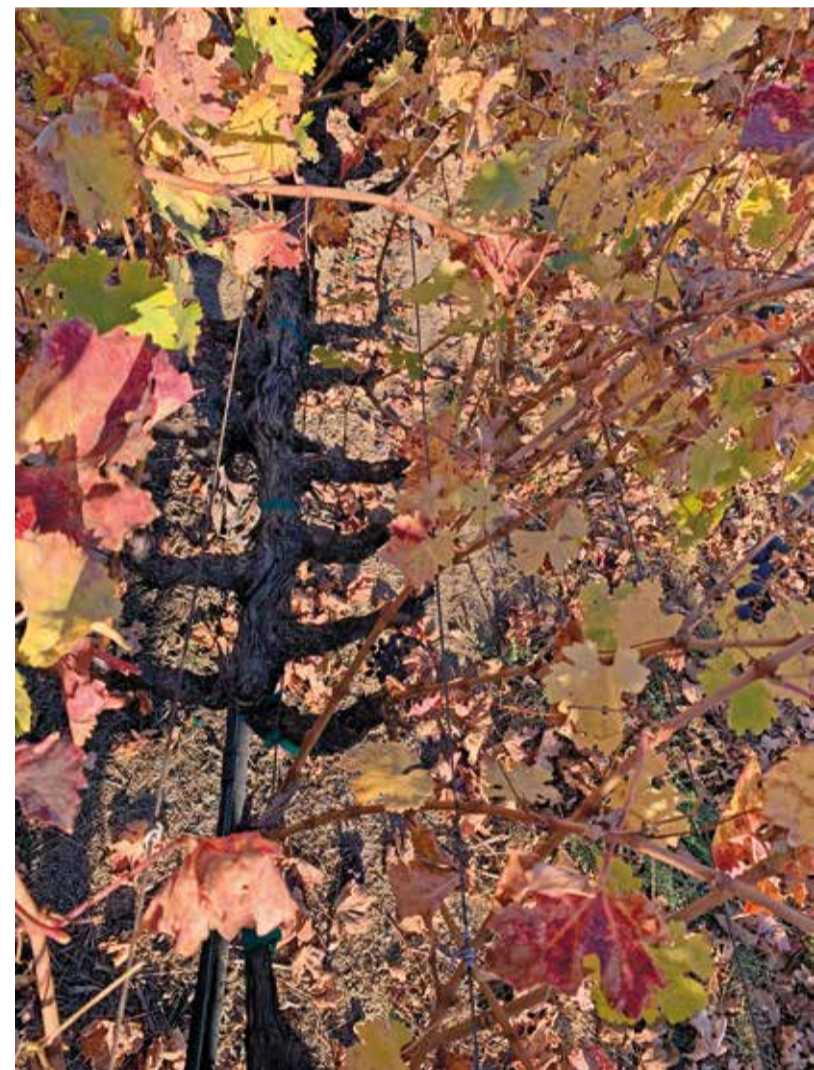
To mitigate the effects of global warming, we need to call into question the basic concepts that have inspired canopy management until now, starting with vigour and plant architecture, with one eye on the past and one on the future

**G**lobal warming is not the only change to take place in winegrowing in recent years. It is certainly the toughest to tackle, but it goes hand in hand with the change in wine styles sought after by the market. But while everything else is changing, little has changed in the vineyard, or at least not enough. "Climate change has not been followed by modifications to the architecture of training systems and plant wall management," points out **Marco Simonit**, cofounder of Simonit&Sirch- Grapevine pruners. "For the last forty years or so, espalier has gradually replaced local vine training systems. There has been a passive importation and the spread of 'turnkey' vineyards has not favoured contextualization with respect to pedoclimatic conditions, experience and variety. At the same time, in the last twenty years vineyards have become more densely planted, yields have been reduced, grapes are more concentrated and wines more opulent in their pursuit of awards from wine guides and critics. Today, we are looking for elegant wines that are lighter, easier to digest and fresher. The market is different, the climate has changed, but espalier systems are the same and the agronomic approach has not changed enough."

### Espalier: Pros and Cons

There are several positive aspects to espalier, such as a high degree of mechanization. But, on the other hand, it forces vegetation into the same space over time and this makes it necessary to carry out a series of operations with inevitable consequences. "One example is mechanical or manual staking of vines, or something in between, which is compulsory for espalier but creates the risk of plant diseases and shoot clustering," Mr. Simonit explains. "Incorrect arrangement of space has repercussions on capturing light and photosynthetic performance. Lack of uniformity in the development of shoots to be trimmed, with very different diameters and lengths, is another aspect that conditions bunch morphology and weight and grape composition. The way Espalier training systems have been conceived, also to facilitate work between plants, means they cause a lot of land to be exposed to solar radiation. This does not help to maintain a cool environment, which is positive for the vine, but causes water loss from the soil and releases heat during the night, especially during difficult times in summer, when the plant needs it most. Therefore, it creates conditions that bring forward ripening, raise sugar levels and distance technological ripening from phenolic ripening, when it doesn't also cause heat damage to completely exposed bunches. And therefore, after all these imbalances, what can you do? The harvest is done earlier and earlier to avoid very high sugar levels, very low acidity, and wines that don't stand the test of time. The

An example of "evolved" cordon espalier: lateral vegetative points are arranged along the axis of the wine row and develop shoots on the two opposite sides. This determines the position of bunches on two opposite bands on one side, and on the triangle on the other side. The photo on the right shows "evolved espalier" from above; the photo below shows the side of the row, where bunches are protected by slanting shoot



right soil management can lessen the 'side effects' of espalier. However, unfortunately there is an ongoing tendency to 'not work' the soil, instead of adopting beneficial controlled grassing over, cutting and cover cropping."

### Wall Height and Vigour

"The substantial height of the wall," continues Simonit, "met the need to produce lots of sugars. The first topping is done when shoots grow above the height of the espalier, so not based on whether it is necessary or not to develop side shoots, but for a kind of geometric pre-setting. And that's assuming the plant has the right vigour. The result of this operation depends a lot on homogeneous shoot development: often it doesn't affect most of the shoots, but only causes reactions in bunches of some of the shoots. Shoots that are not topped have a completely different metabolism to the others. Conse-

quently, depending on vigour, topping significantly conditions the development of side shoots in the proximity of bunches, with important influences on grape composition, ripening times and the protection of bunches from excessive exposure to the sun. Depending on the variety and winemaking aims, side shoots can be managed, topped or maintained. But side shoots can only be

used to guide plant physiology if they are present. Therefore, it is clear how important vigour is.”

Until some years ago, reaching a balance between growth and fruit production was imperative. Intervening on the vine as little as possible with shoot and crop thinning was a sought-after result. On the basis of these considerations, it would no longer seem to be a suitable aim.

“The balance between growth and fruit production was an almost unintentional ideology that lasted for many years,” Mr. Simonit says. “Anyone who carried out topping was seen as a sinner, because it meant that plants were unbalanced. How can you explain that the greatest wines in the world are produced in vineyards where they carry out topping 4-5 times a year? Decisions need to be adapted to conditions: in some areas it may be necessary to have high walls, while not in others. With the same plant architecture, for example, if a 180-cm wall is Okay for Nebbiolo in Piedmont, it might be too much in Abruzzo. To give another example, in some particularly hot areas of Tuscany it might be interesting to have a wall half that height with the development of side shoots in order to obtain wines with more balance, stability and ageing potential. With good vigour conditions, choosing an earlier moment for the first topping, enabled by a higher wall height, is a good solution for protecting the grapes from the sun when there are problems of excessive solar radiation and scorching. Removal of leaves and lateral shoots, especially under organic or biodynamic management, is sometimes necessary to maintain a microclimate favourable to grape bunch health and to be able to reach and treat just the fruit area effectively with active substances that don’t transfer. However, these needs often lead to exposing the grapes even more than they are already, on espalier.”

#### “Evolved” Espalier

Espalier systems conceived for different climate and market conditions than today’s, and vineyard management to be modified according to specific pedoclimatic conditions, varieties and winemaking aims, are no longer relevant nowadays. Many starting points for change have arisen by observing traditional vine growing methods, especially in hot climates, and the “reinterpretation” of espalier is already a reality.

“There are very hot areas in Spain, Portugal, Tunisia, Greece, the United States and also in Italy, which have ‘territorial’ vine training systems, such as arbour, bush and pergola, with great structural and vegetative development of the plant,” Mr. Simonit says. “Fresh white wines are produced with good acidity and ageing potential, using bush-trained vines in scorching areas of the world without irrigation. Grapes are kept intact by early topping, side shoot development and hanging vegetation that protects grape bunches and shades the soil, guaranteeing cool temperatures at night and preserving humidity in the soil. Fortunately, these local training systems have not completely been lost. The pergola and arbour systems, used in the past to capture more light with high leaf surface area and to produce more grapes with adequate sugar levels, represent an interesting starting point not for the sugars, but for their ability to mitigate the effects of global warming. I have seen espalier systems with drip irrigation burning under the summer sun in the Douro Valley and Rioja, in Spain, while 50 or 60-year-old, bush-trained vines display a beautiful green canopy without a drop of water. This is demonstrated by the presence of a wooden structure built over the years that guarantees the performance of the plant over time, as well as the accumulation of plant reserves, complex and efficient root systems, able to find water, and canopies suited to the environment. In contrast, espalier systems are suitable for Bourgogne, Champagne and Bordeaux. There, they need to remove leaves for aeration because, while it almost feels like summer here today, it was 15 degrees and raining in Bordeaux and Champagne this morning. Obviously, they need a high number of plants per hectare and a low yield per plant to obtain the grape composition they need. We, on the other hand, are in a completely different situation and have the same, or very similar, viticultural models.”

Suitable vine training systems for the future will need different density, plant spacing and, above all, plant wall architecture.

“Espalier systems, as they are structured today, are outdated in this period of climate change,” Mr. Simonit claims. “There are people dying of hunger and thirst all over the world. Water is too important a resource to think of using it for viticulture. We need to find ‘self-sustaining’ alternatives, and at least partly mechanizable ones. In California and Australia, they are investing heavily in espalier to overcome limits, using plant walls that are no longer closed and narrow, but open, with complex structures to position the shoots not vertically, but slanting to form an upside-down triangle. This system is designed and created to distribute shoots in the space and to increase coverage and shade of the soil and bunches with vegetation. They are formed by a primary structure, which can be a cordon or a guyot, in which the shoots are distributed almost in a ‘vase’ shape, like an open ‘V’. We have been working for many years on these ‘alternative’ espalier systems, which I call ‘evolved’ because they follow the evolution of the climate and allow a dynamic shoot positioning in the space and time of the primary and secondary structure. They have good potential for mechanization, though mechanical pre-pruning and harvest prove difficult, even if some have tried it, but with not very flattering results.”



#### INTERVIEW WITH **LUCIANA BIONDO**

## We Need a Holistic Approach

*Mitigating the effects of climate change on the plant is easily achievable by integrating canopy management with other practices in an all-round vision of the vineyard’s microclimatic system*

“To contrast situations of vine stress induced by climate change, we must look at the vineyard as a complex system where all decisions contribute to the end result. An example of this approach is the great importance of soil management on canopy health, and therefore on planning work on vegetation.” This is how **Luciana Biondo**, an agronomist working in Piedmont after gaining lots of experience in different regions, emphasizes the holistic vision with which to look at vineyard management in times of global warming. “The other general consideration about all the work is that timing is essential,” Ms. Biondo, director of Tenuta Santa Caterina, continues. “We must give quicker and more varied solutions than before, when we used to act

canopy management must be aimed at the plant’s wellbeing. While the old school imposed decisions about leaf removal and shoot thinning along the east-facing side of the vine row, or in some special conditions, today’s aim is to reach the summer period first and foremost with a healthy canopy, in the best conditions to help the plant to suffer as little as possible from extreme weather conditions. And the plant is healthy if the soil and roots are healthy. That’s when the fundamental premise for achieving canopy management useful to supporting environmental stress, particularly water stress, is to reduce water loss from soil through the management of grasses, depending on the weather events that occur. We understand how useful targeted sowing between rows is, choosing grasses according to knowledge of the vineyard and winemaking aims. They improve the structure of the soil and should be managed according to the weather conditions that actually occur. You can decide to cut, flatten or bury them depending on whether the vintage is particularly wet or dry. Moreover, grassing over increases biodiversity, which also helps to manage diseases and therefore the plant’s wellbeing, making it react better to stress. Not that canopy management has lost value, but if the first decision to ‘remove leaves or not’, ‘remove side shoots or not’ used to be done out of habit, because we knew that it was necessary in a certain vintage, this is no longer the case today. We must be ready to act one way or another depending on what is required.”

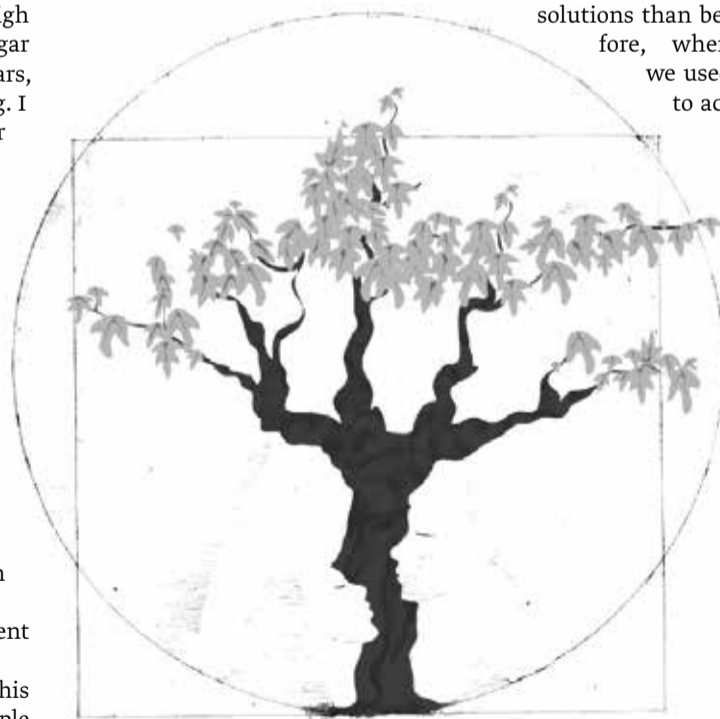
**Therefore, over the years, canopy management has undergone, or rather should have undergone, important changes.**

The best thing to do has certainly changed in theory. But in reality, frequently people still rely on consolidated and easy-to-organise techniques that are often not the right ones. However, I don’t want to generalise: there are many differences between regions.

There are areas where it proves difficult to introduce innovative know-how that breaks with all previous traditions, areas that will have to face problems of widespread global warming in time. Shoot thinning, which is done in spring, is an operation that is always done if your aim is to produce quality. Leaf thinning and topping, on the other hand, are fundamental for determining grape quality in terms of colour and composition. Regulating production with these tools is useful, but you must always keep an eye on how the vintage is going. Thus, topping tends to be done later and less intensely. Over the years, some have tried to leave the “cap” higher in order to keep the wall shaded. All of this, I repeat, must be integrated into the general vineyard scenario with a holistic approach. In contrast to early topping, I can say that delaying topping in certain climates, depending on plant health, may help you decide what should be done based on the real conditions, because in any case balance is always fundamental to wellbeing, and is what helps it to find positive reactions. Side shoot management, also to delay ripening, must bear the variety in mind. It is pointless aiming for too-low yields especially for white varieties, with the risk of getting concentrated grapes and putting acidity at risk, though the winemaking aim must be borne in mind. But that’s another question.

**Will criteria used to plan new vineyards in light of new conditions imposed by global warming be different to those used in the past?**

Yes, of course, especially regarding density. In recent years we haven’t heard of or seen excessively dense new vineyards, i.e. over 5,500-6000 vines/ha. Plant spacing will have to change, but I don’t want to talk about new vineyards, because it isn’t the right time given the Covid-19 crisis. I don’t believe we should suggest changing a vineyard today, but we should modify current canopy management and be wary of single solutions to problems, as they don’t exist.



on the basis of solid experience. The weather used to be more predictable, for example rain in spring, high temperatures in July, but the extreme conditions that we are often faced with today, make it essential to be ready to analyse situations and make decisions. That’s when work plans need to be more elastic and adaptable to conditions that arise each time according to how the vintage is going and with all that follows. The starting point is that for the vine to produce good grapes, it must be healthy and with this in mind



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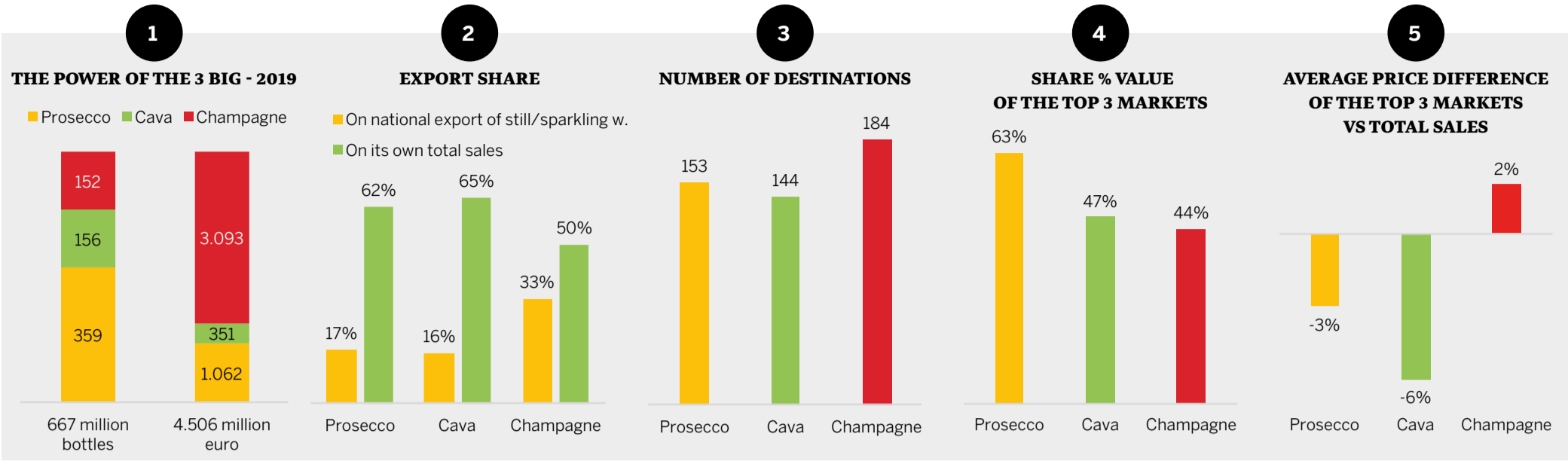


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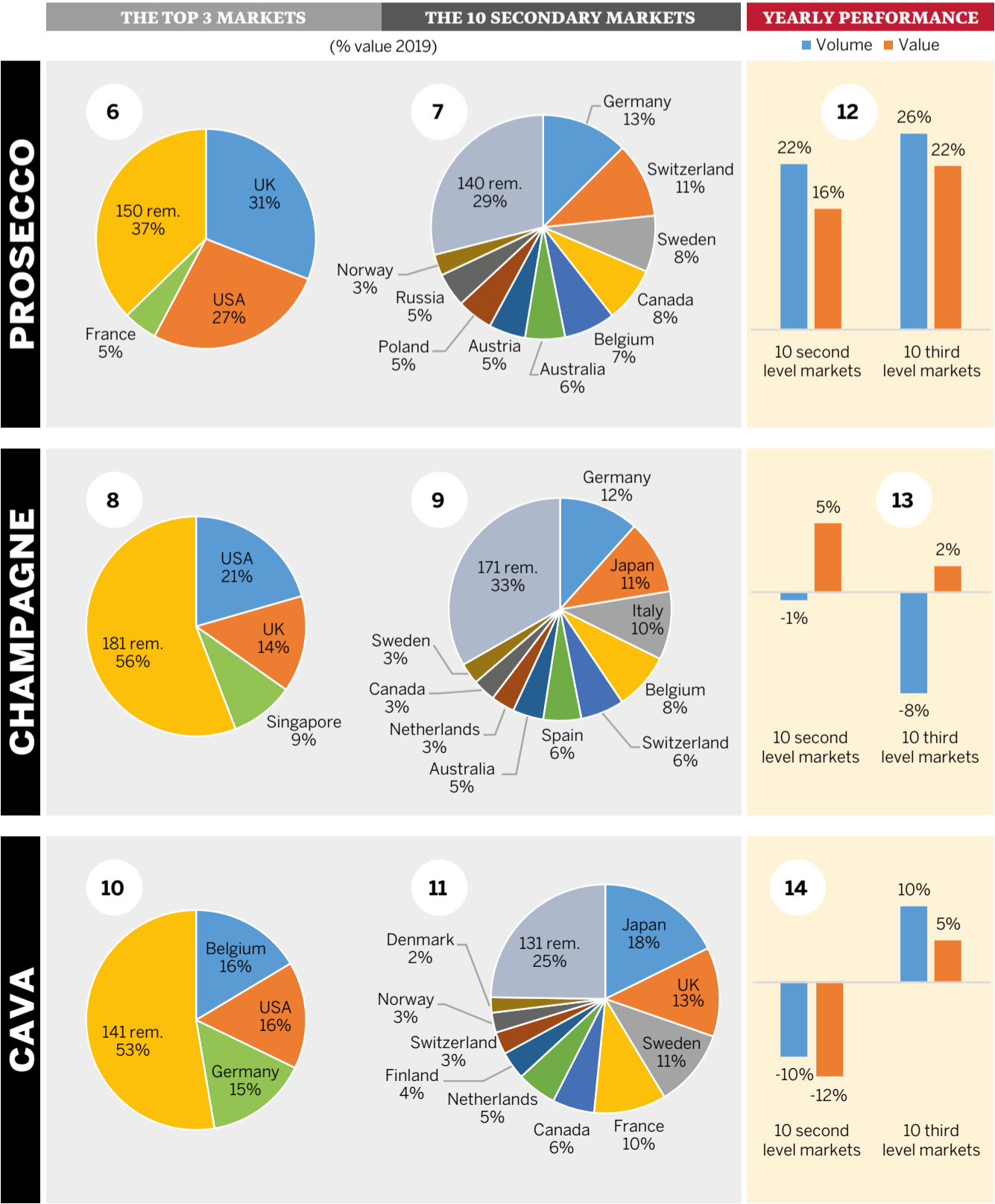


# Prosecco, Cava and Champagne

## MISSION “EXPANSION”

by CARLO FLAMINI

Over 4.5 billion in export value and 670 million bottles for the 3 biggest sparkling wines. Prosecco is more dynamic in searching for new outlets, with France historically overtaking Germany, and significant growth on second-level markets. And Asia? It’s growing, but still too slight

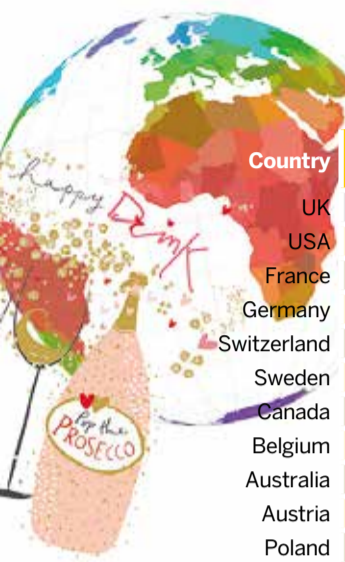


In 2019, the three great sparkling wines totalled 4.5 billion euros in value abroad (up 300 million on 2018), for a total of 667 million bottles (613 in 2018). Half of them were Prosecco, the rest were almost equally divided between Cava and Champagne (Figure 1). When we come to the value they generate, the tables are turned, however, with French sparkling wines worth 3 billion euros (up 200 million on 2018), equal to 70 percent of the total, against 23 percent for Prosecco (1.1 billion) and 7percent for Cava (390 million euros of turnover abroad). The weight of total bottled-wine exports (still + sparkling + semi-sparkling) of the respective countries are more significant. Thirtythree percent for Champagne (up 1 percentage point), 17 percent for Prosecco (up 2 percentage points) and 16 percent for Cava (down 1 percentage point), with strong growth for Prosecco on the Italian total; by now it has become a category in its own right. The export share of total sales in volume sees a very strong trend for Italian and Spanish wines abroad, over 60 percent, compared to 50 percent for Champagne, though this share has still grown considerably in the last three years (Figure 2).

**The Distribution**  
Where are these values abroad? First of all, the different publics are very diversified: the most widespread wine is the one with the lowest production, i.e. Champagne (184 destinations, stable), while the most-produced wine, Prosecco, is somewhere in the middle, with 153 destinations (also stable compared to the previous year). Cava has the least destinations (144 countries), a sign of a higher average market coverage compared to the bottles exported to each country (Figure 3). As highlighted in the report on world trade, the three great sparkling wines also have problems of concentration (Figure 4), which are more evident for the Italian product. Facing taxes fluctuating between 44 percent (Champagne) and 47 percent (Cava), on the first three markets (with the news that France

has overtaken Germany, thanks to the umpteenth powerful growth in value, +46 percent compared to a lean +3 percent for Berlin), Prosecco has earned 63 percent of the billion euros of foreign turnover (2 percentage points down on 2018). However, the variation in price between the first three markets and the average Prosecco exports, is less than for Cava: a 3 percent reduction compared to 6 percent for the Spanish sparkling wine, while on Champagne’s first 3 markets (USA, UK and Singapore), average prices are 2 percent higher than the average of the other destinations (Figure 5). Essentially, both the Italian and Spanish sparkling wines have established themselves on the three main markets applying lower average prices compared to the general average, while on the other hand, Champagne has slightly higher prices on their main markets.

**Second-level Markets**  
The concentration of Prosecco exports doesn’t change much if we exclude the first 3 markets and assume that the total is made from the sum of all the others. On the 150 remaining markets (Figures 6-7) which are worth 395 million euros, a third is generated by Germany, Switzerland and Sweden (another new entry, which has overtaken Canada and Belgium, thanks to constant growth). The situation is similar for Champagne (Figures 8-9), with Germany, Japan and Italy making up a 1/3 of the one billion, 700 million euros earned from the other 181 remaining. Cava is even more unbalanced, in Japan, UK and Sweden (which has overtaken France) it makes up 42 percent of the 185 million generated from the 141 remaining destinations (Figures 10-11). If we compare the three main markets, the three sparkling wines only have the USA in common, while Prosecco and Champagne both have the UK in common, while Germany is only on the podium for Cava, after being overtaken by France for Prosecco. On the ten second-level markets, they only have three countries in common: Canada, Sweden and Switzerland.



PROSECCO: TOP 50 MARKETS BY VALUE - 2019

Country	Litres	Euro	Euro/litre	Share % value	Ch. % volume	Ch. % value
UK	96.782.436	328.725.818	3,40	31%	8%	-2%
USA	67.174.098	284.195.284	4,23	27%	40%	39%
France	13.958.551	53.222.479	3,81	5%	49%	46%
Germany	11.397.959	49.426.707	4,34	5%	11%	3%
Switzerland	9.252.502	42.921.198	4,64	4%	17%	12%
Sweden	7.831.526	31.984.809	4,08	3%	39%	36%
Canada	6.225.686	31.574.328	5,07	3%	29%	27%
Belgium	8.135.057	29.316.762	3,60	3%	8%	3%
Australia	5.278.389	22.756.311	4,31	2%	14%	9%
Austria	4.699.637	20.871.127	4,44	2%	33%	14%
Poland	5.115.414	20.599.204	4,03	2%	64%	61%
Russia	4.895.084	19.331.626	3,95	2%	32%	26%
Norway	2.630.389	12.095.780	4,60	1%	5%	2%
Netherlands	1.827.564	8.262.139	4,52	1%	10%	4%
Latvia	1.728.108	7.657.922	4,43	1%	48%	55%
Czech Rep.	1.596.561	6.844.837	4,29	1%	29%	25%
Finland	1.426.091	6.196.909	4,35	1%	3%	2%
Spain	1.597.778	6.020.725	3,77	1%	1%	-7%
Japan	1.055.056	5.168.034	4,90	0%	30%	30%
Lithuania	1.128.003	4.849.230	4,30	0%	69%	73%
Greece	1.128.396	4.738.034	4,20	0%	27%	17%
Ukraine	1.107.358	4.618.163	4,17	0%	65%	57%
Romania	1.227.296	4.615.390	3,76	0%	36%	20%
Estonia	819.679	3.817.190	4,66	0%	16%	9%
Slovakia	909.498	3.654.638	4,02	0%	59%	36%
New Zealand	827.320	3.452.145	4,17	0%	79%	68%
United Arab Em.	549.361	2.931.651	5,34	0%	14%	9%

	Litres	Euro	Euro/litre	Share % value	Ch. % volume	Ch. % value
Denmark	700.088	2.920.167	4,17	0%	-8%	-18%
Ireland	701.313	2.851.484	4,07	0%	19%	13%
China	541.387	2.410.467	4,45	0%	34%	30%
Mexico	513.390	2.285.866	4,45	0%	21%	26%
Hong Kong	419.411	1.981.896	4,73	0%	34%	28%
Singapore	383.337	1.927.752	5,03	0%	18%	17%
Croatia	396.888	1.828.566	4,61	0%	40%	22%
Thailand	363.179	1.755.544	4,83	0%	38%	35%
Cyprus	335.810	1.601.387	4,77	0%	10%	13%
South Africa	307.324	1.590.711	5,18	0%	-10%	-1%
Hungary	295.067	1.315.466	4,46	0%	14%	-4%
Malta	239.309	1.111.909	4,65	0%	21%	11%
Portugal	252.920	1.008.434	3,99	0%	78%	69%
Bulgaria	207.674	970.455	4,67	0%	31%	21%
Serbia	203.319	875.961	4,31	0%	43%	34%
South Korea	142.807	734.376	5,14	0%	61%	52%
Belarus	151.615	611.939	4,04	0%	439%	279%
Turkey	126.088	595.936	4,73	0%	83%	91%
Lebanon	97.148	572.103	5,89	0%	5%	0%
Colombia	121.403	533.523	4,39	0%	49%	35%
Vietnam	92.787	516.579	5,57	0%	70%	68%
Luxembourg	98.084	485.066	4,95	0%	-22%	-21%
Maldives	118.860	483.111	4,06	0%	78%	61%
103 remain.	2.175.388	10.692.729	4,92	1%	-1%	2%
Extra EU	104.638.165	456.125.162	4,36	43%	33%	30%
EU	164.651.228	605.384.705	3,68	57%	15%	7%
Total export	269.289.393	1.061.509.867	3,94	100%	21%	16%

Diversification

Which of the three sparkling wines is making the most effort in the vital process of portfolio diversification? The answer is clear: as Prosecco has the highest concentration rates, it is also the one that feels the need to widen its markets more. From Figure 12, in fact, it emerges that Prosecco performs extremely well both on the 10 second-level markets (from the 4<sup>th</sup> to the 13<sup>th</sup>, including Germany, Switzerland, Sweden and Canada), and even more so on the next 10 ones from the 14<sup>th</sup> onwards (Netherlands, Baltic, Finland and Japan): the annual performance in volume and value from 2019 illustrate a progression of over 20 percent, while on the larger ones, it is above 20 percent in volume and 16 percent in value. With these figures, the performance of the other two pale into insignificance: Cava (Figure 14) is decreasing in volume and value on the first 10 second-level markets (Japan, UK, Sweden and France), while they press much more on volume than value on the 10 third-level markets (Poland, Brazil, Baltic). Champagne (Figure 13) shows good development in value on second-level markets (+5 percent, PROSECCO: FIRST 50 DESTINATIONS 2019 by CARLO FLAMINI, but at the expense of volume), including Germany, Japan, Italy, and Belgium, while not performing so well on third-level markets (Emirates, Austria, Hong Kong and Denmark), where there is a 2 percent increase in value against a decrease of 8 percent in volume.

Asia, Yet to Be Built Up

The Asian continent is proving to be tougher to penetrate with sparkling wines. Excluding Japan and South Korea, and setting aside Singapore which mainly acts as a hub for Cham-

pagne, the share of China/Hong Kong/Taiwan and South-east Asia remains marginal for European sparkling wine businesses. In terms of percentages we are talking about 1 percent of volume and value for Prosecco and Cava and 2 percent for Champagne.

In absolute values, obviously Champagne generates more trade (Figure 15). If Singapore alone is worth almost 300 million euros (9 percent of the total), more than one difficulty continues to be observed on the Chinese market and the relative appendices of Hong Kong and Taiwan. In total, we are talking about sixty millions euros out of a total of 73 generated by the area, in fact 2 percent lower than in 2018. For Prosecco, on the other hand, the total is just below 10 million euros (Figure 16), however there is a strong increase (+25 percent), in the main outlets China, Hong Kong and Singapore. There is also strong growth in Vietnam, the Philippines and Malaysia. For Cava (Figure 17), the turnover is just over 2.5 million euros, with China, Hong Kong and Taiwan just below 2 million euros, and substantially stable. Then come Singapore and all the other markets with negligible shares.

Who Carries the Most Weight and Where

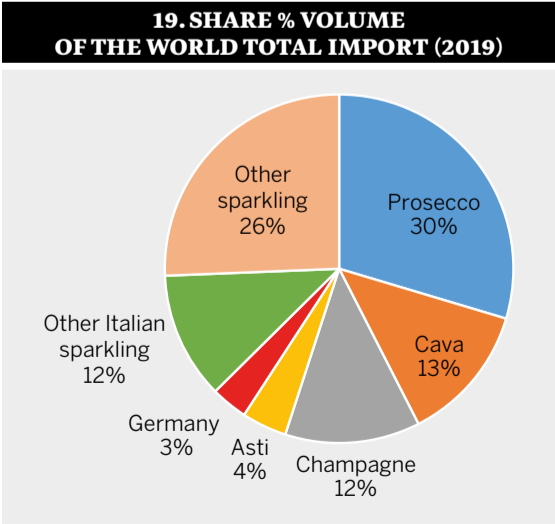
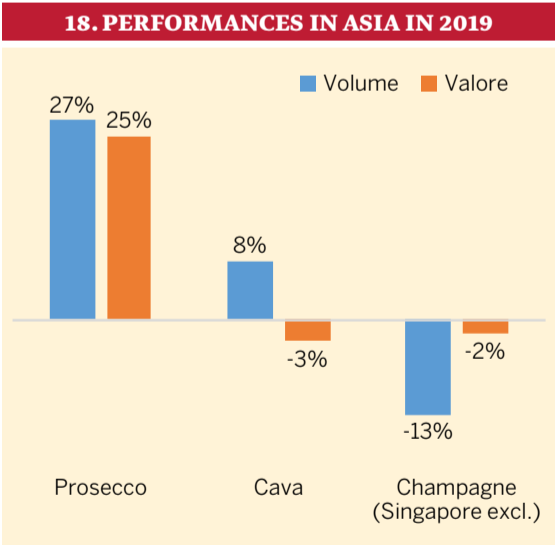
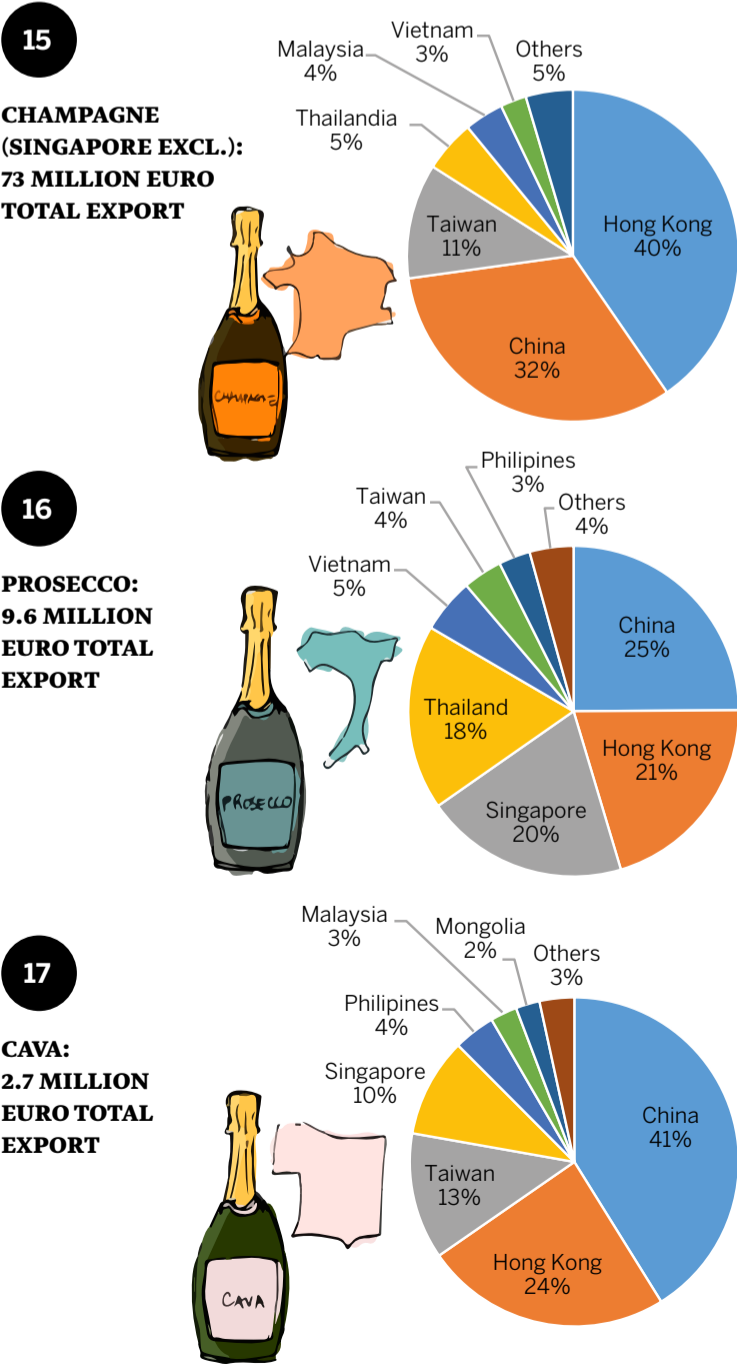
Competition on a global level sees Prosecco as the top sparkling wine today: out of a total of 1.2 billion bottles in circulation (2019 figure), Prosecco makes up 30 percent (4 percentage points up on 2017), compared to 13 percent for Cava (-1 percentage point) and 12 percent for Champagne (down 2 percentage points) (Figure 19). Asti is worth 4 percent, 1 percentage point less (51 million bottles), while German sparkling wines make up 3 percent

(41 million bottles). A further 143 million are Italian sparkling wines other than Prosecco and Asti, mainly with a registered designation of origin (about twenty million fewer bottles), while the rest is scat-

tered among the other countries, including other Spanish and French sparkling wines- 311 million bottles. Among Prosecco, Asti and the rest, Italy totals over half a billion bottles, 46 percent of the total.

Let's take a look at the different weights on the main destination markets (Figures 20 to 23). In the UK, Prosecco is now worth almost 70 percent of the import market (2 percentage points up on 2017), compared

to 20 percent earned by Cava and Champagne (6 percentage points less). In the USA, where there are also local sparkling wines on the market, the wines from Veneto-Friuli are the top import product, with a share of





44 percent of the total volume (up 8 percentage points). In Germany on the other hand, the share of Prosecco sparkling wine is smaller (18 percent), inasmuch as a market share is also taken up by semi-sparkling wines. In Germany, Cava wins the sparkling wine war, with 35 percent of the share, and it also prevails in Belgium, which has always been a stronghold for traditional method sparkling wines, making up half the volume destined to Brussels. The situation is more difficult in Japan and Russia, where the small shares in volume of Champagne are compensated by the higher added value of the product, an immeasurable factor for volume products such as Prosecco and Cava. In Russia, a large share of the market is made up of sparkling wines of a different origin, like the Republic of Abkhazia, formally recognised only by Moscow. The Spanish take up a large share of the market in the Land of the Rising Sun (21 percent), compared to a negligible

2 percent for Prosecco and Asti. Asti has made a strong comeback in Russia (15 percent), where there is also an increase in the product from the Veneto (standing at 11 percent, up 2 percentage points on 2017). In France, where Champagne is not included in the import figures, Prosecco stands at 48 percent and has overtaken the Spanish to become the top foreign reference in this incredibly difficult market. Another important leap can be seen in Sweden, where the share reaches 31 percent (up 8 percentage points on 2017 and 8 percent above the Spanish), and also in Switzerland, a nearby market that is literally invaded by Veneto wines, 45 percent of the total (8 percentage points up on 2017). In Australia and Canada, Prosecco has reached a share of 30 percent, earning something like 10 percentage points, while in the Netherlands, like in Belgium, competition from the Spanish product and other sparkling wines, especially German ones, is still very marked, although Prosecco is coping well.

## INTERVIEW WITH ANDREAS BROKEMPER, CEO of the Henkell-Freixenet Group

# The Best Gift the Crisis Gave Us Was Time To THINK AND INNOVATE



by CARLO FLAMINI

**“W**hen for whatever reason you are forced to stop, that is the right moment to think and innovate.” This is the message arriving from Germany, from Andreas Brokemper, CEO of the international group Henkell-Freixenet, the largest sparkling-wine producer in the world, which owns the Mionetto brand in Italy, has 30 branches worldwide and over 4,000 employees. “When people’s lives change in such a drastic manner, and they are forced to stay at home, they always expect something new. And it is our job to propose it in these difficult times.”

### Is that why you are currently creating new products?

Yes, we are keeping our level of innovation high. For Freixenet we have launched a mini bottle of Prosecco and an Italian rosé. Then we have introduced a new line of Italian still wines in the “diamond” bottle. Some brands will undergo restyling and we are extending our portfolio of wines in cans, in the wake of the Sparkling wine brand’s success on the American market.

### But what about concerns for today and tomorrow?

You’re right, there are. At the moment, there are many concerns, starting with the health of our employees and all of our partners and clients. We start every day with virtual meetings with all our associates, in Spain, Italy, France and now in the USA. Covid has affected every country in the world, limiting operations and slowing down deliveries, with trucks grouped row upon row at borders, just to give an example. We are facing daily logistics problems in our operations that used to be just routine until the other day. Our collaborators are doing a sterling job to guarantee supplies to our clients during this crisis. But let’s look on the bright side: I have never seen such large and widespread solidarity between partners, constantly helping each other to face these difficulties. What puts us to the test today, makes us stronger tomorrow, as a community.

### But sparkling wine consumption seems to be most at risk, considering the occasions and places where it is drunk. Don’t you agree?

The non-Champagne sparkling wine market is currently expanding, it has crossed European borders to arrive firstly in the U.K., in North and South America, and even in Oceania and Africa. Sparkling wines have managed to emerge from their main and almost exclusive role, which was for celebrations and parties, to become a more everyday product. I am certain that we will see a short-term slow down, but in the medium and long-term, growth will return, especially when people will be able to go back to celebrating life again...



Andreas Brokemper, CEO of Henkell-Freixenet



*“In the darkest moments people expect something new, and it is our job to propose it. Sparkling wine will not be damaged. On the contrary, we’ll have a new post-2008”*

### However, today there are very few reasons to be cheerful and celebrate...

Celebrating life also means giving it the right value and appreciating it. We are all beginning to understand that being healthy cannot be taken for granted. We see people toasting with aperitifs on balconies, in chats, and soon the time will come when we can leave this crisis behind us, a time when we will all want to, in fact, we will all need to celebrate. I foresee more positive signs in the future.

### Can you give me some examples?

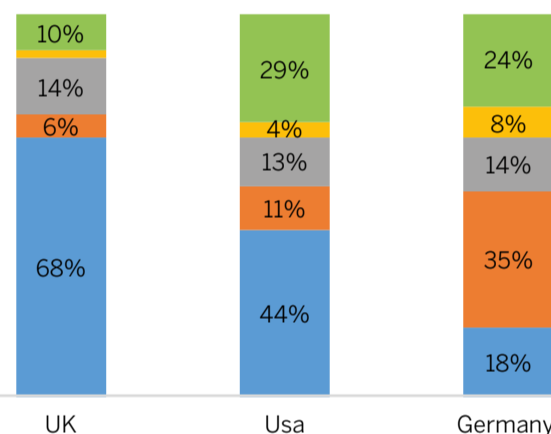
There is a factor that we tend to underestimate: sparkling wine is typically a drink for women. Women are becoming more key players in active, working life. And they like to drink two types of drinks, especially with their friends: those with a low alcohol content and social drinks like sparkling wines. We mustn’t forget the lessons learnt during the 2008 financial crisis, which gave Prosecco a real boost: consumers traded down from Champagne, looking for sparkling wines that were more affordable for everyone, at the end they discovered that Prosecco fitted the bill perfectly.

### Do you think it will take a long time for the world to get over this shock?

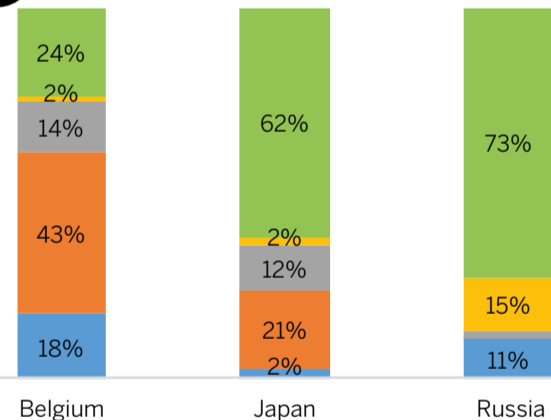
Everything depends on how much the United States will be able to support its economy with subsidies and liquidity, both during and after the lockdown. Undoubtedly millions of restaurants and bars all over the world have been forced to close and events cancelled. I hope that recovery will start in the third quarter of this year and that we will return to business as usual next year. I hope we can put this crisis behind us once and for all by the eve of the new year, allowing ourselves another reason to celebrate.

## 20 UK - USA - GERMANY

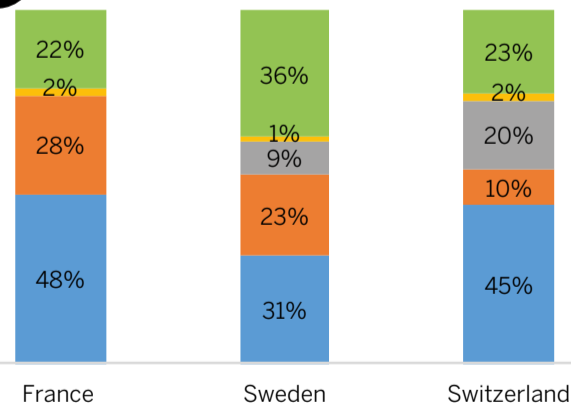
■ Prosecco ■ Cava ■ Champagne ■ Asti ■ Altri



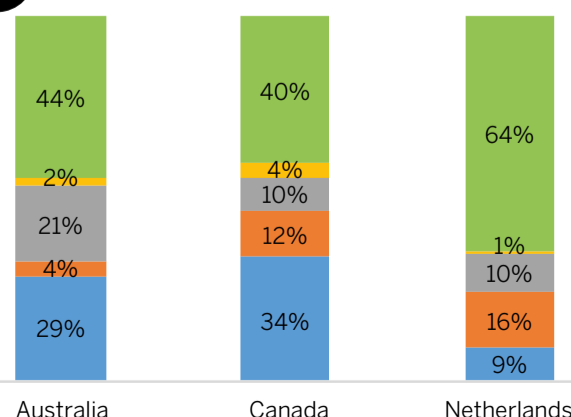
## 21 BELGIUM - JAPAN - RUSSIA



## 22 FRANCE - SWEDEN - SWITZERLAND

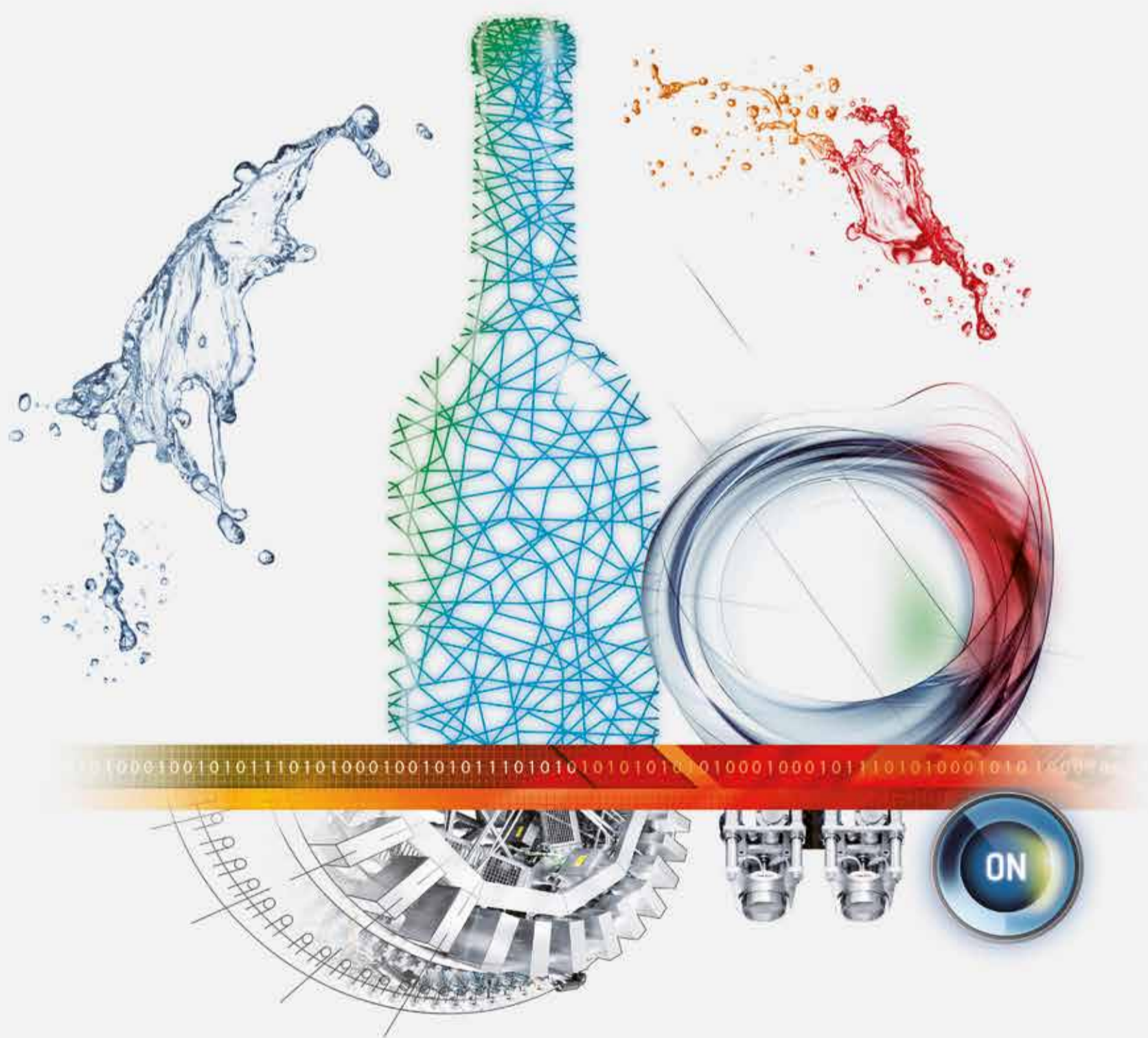


## 23 AUSTRALIA - CANADA - NETHERLANDS



INTERNATIONAL  
ENOLOGICAL  
AND BOTTLING  
EQUIPMENT  
EXHIBITION

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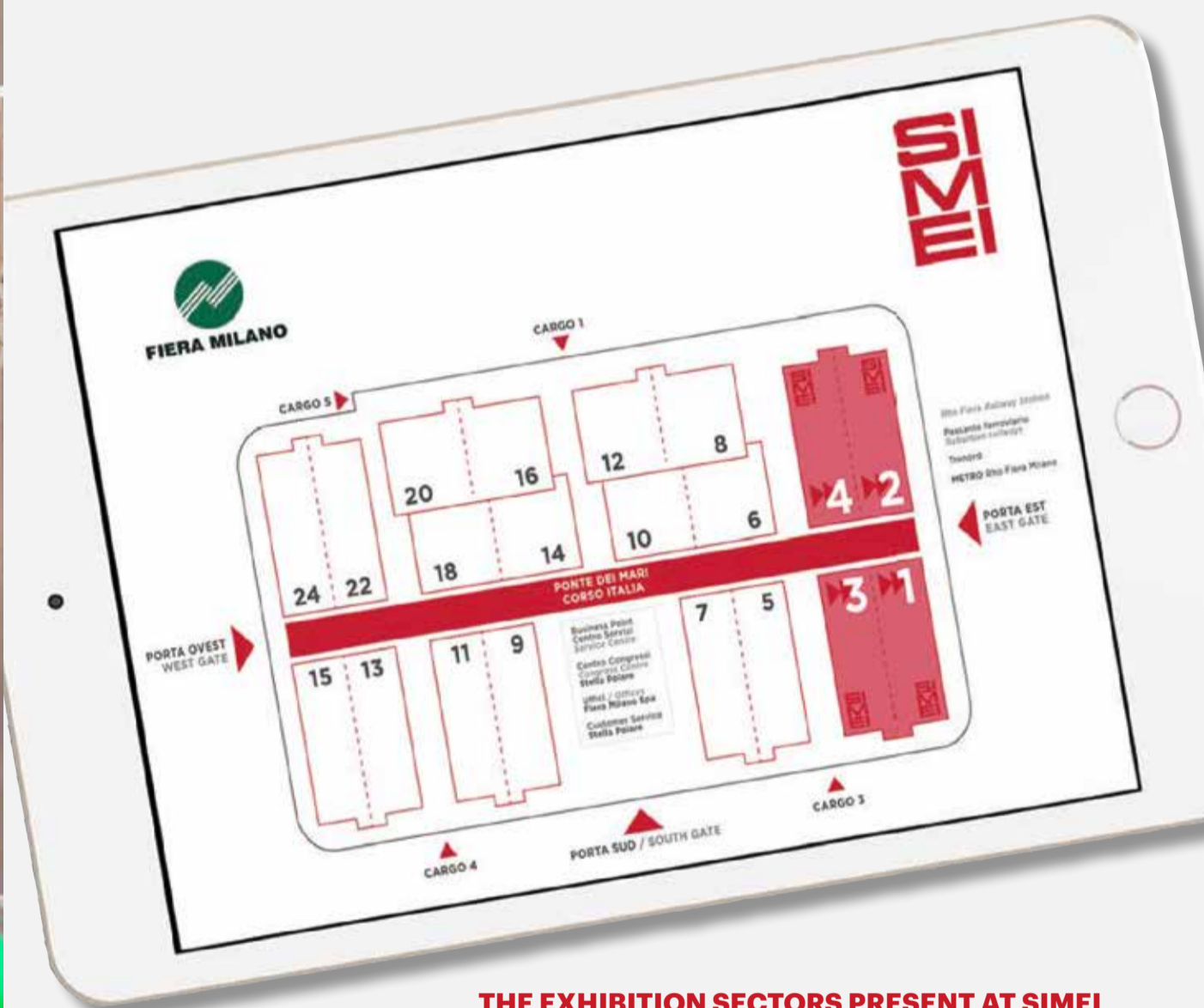


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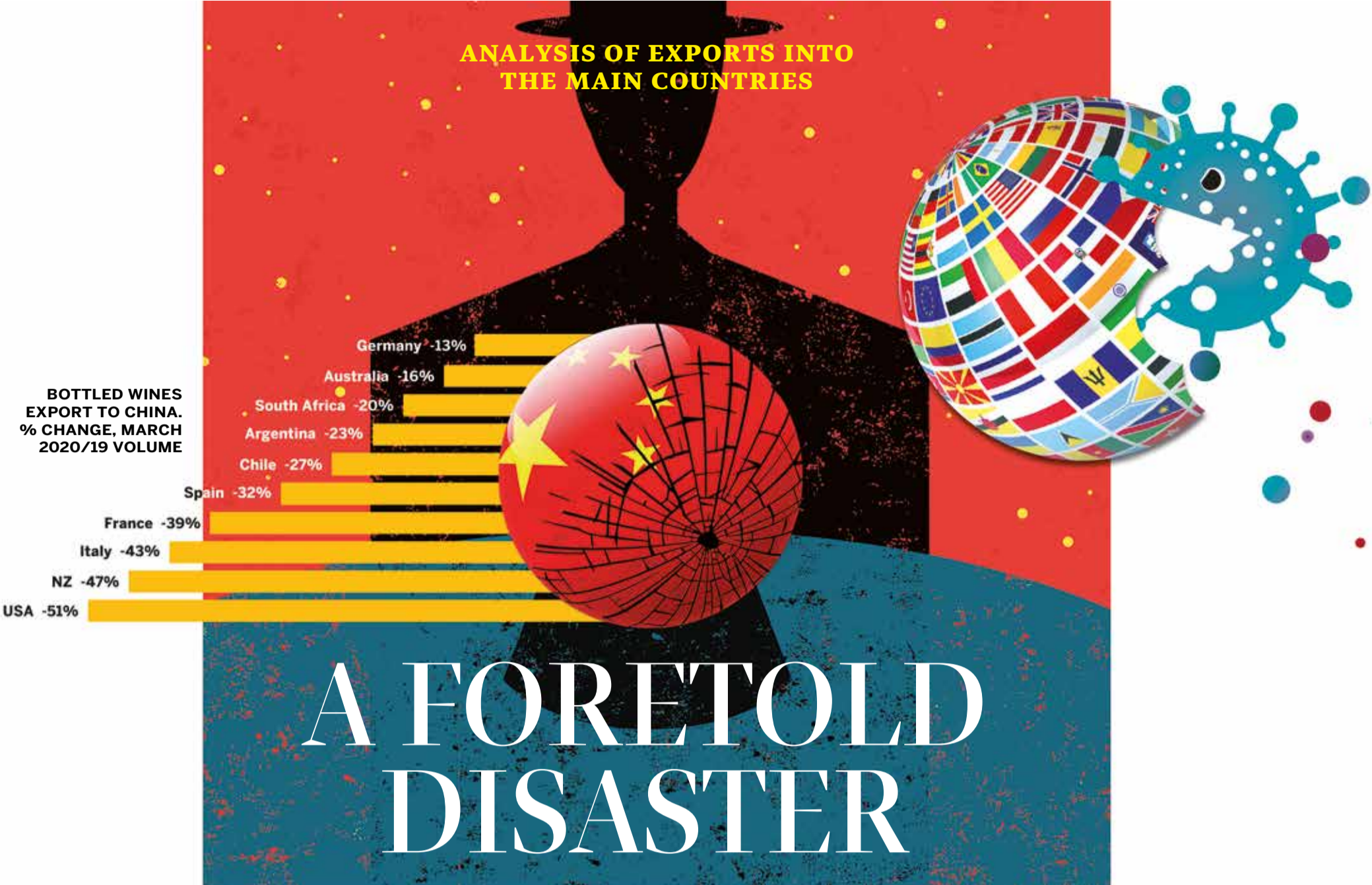
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- Bottling and filling
- Sealing machines
- Containers
- Closures
- Labelling and printing systems
- Packaging and in-house transport
- Transversal equipment and products
- Services





Numbers range from -51 percent for the United States to -13 percent for Germany, -39 percent for France, -32 percent and -27 percent for Spain and Chile respectively, and -16 percent for Australia. These are the statistics for exports to China in the first quarter, the first real effect of Covid-19 on international markets. As we know, China was the first country to experience the pandemic and consequent restrictive measures, with the lockdown of an entire province (Hubei) and the resulting closure of industrial and business activities in the whole country, put into effect in March. And March is the month that marks the real collapse of trade, including wine, literally blocked at the departure quay of the

various suppliers. Of course, the impact was not the same for everyone. Australia and Chile, which have China as the first outlet for their wines (also bulk wine for Chile), suffered the biggest drop in commercial power in Beijing. But the French are faring no better, particularly Bordeaux, which links the lean performance on the mainland to the drastic decrease on the Hong Kong market, their number one destination. And Spain is right on their heels, with Beijing as their seventh market, then Argentina, who was looking for new commercial routes in China to replace their declining North American market. The shrinking Chinese market also affected countries who don't do a lot of business with China, like Italy. If we just con-

The first effects of Covid in China and the sector's structural problems bring down performance. If it doesn't get back on track soon, there will be rivers of wine looking for new outlets. Only New Zealand is keeping its head above water.

sider imports of bottled still wine, China counts for about 10 percent of the world total, which means that a share of this product no longer absorbed or absorbable during the year, must inevitably be re-directed elsewhere. And, as the world seen through the clear glass of a bottle is not that big, the obvious destinations boil down to a few countries or areas- North America and Europe. But there are more than just a few problems here, too. The United States introduced duties on some European wines, Brexit is going ahead in the UK and new trade relations still have to be put down in black and white, while the general macroeconomic conditions in Germany aren't the best. And Covid continues, and will continue, to affect all this, with an impact on health as well as on

economic-financial and social dynamics in the various countries. Therefore, we have a very complicated situation, combined with a not particularly brilliant economic winemaking cycle. In 2019, it ended with very large volumes of product to sell (the 2018 vintage), prices nosediving to extremely low levels and still struggling to gain altitude today, despite the low quantities produced in the 2019 vintage.

The Europeans  
Let's take a closer look at performance, starting with France. General exports in March closed at -8 percent in volume and -11 percent in value. Two great assets (Champagne and bottled wines) fell

FRENCH EXPORTS IN Q1

Region/Type

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Champagne	19.978	-10,0	585.104	-5,0	29,29	5,6
Other sparkling	16.894	2,7	70.390	0,7	4,17	-1,9
Sparkling total	36.872	-4,6	655.494	-4,4	17,78	0,2
Slightly sparkling	854	-2,0	3.928	-9,0	4,60	-7,2
Bordeaux	33.378	-12,4	367.499	-24,9	11,01	-14,3
Burgundy	12.873	-2,7	201.899	-9,8	15,68	-7,3
Alsace	3.741	-2,7	21.372	-4,8	5,71	-2,2
Val de Loire	7.284	-6,9	48.163	-11,6	6,61	-5,1
Beaujolais	3.161	-10,0	15.282	-12,3	4,84	-2,5
Côtes du Rhône	13.644	-9,1	84.807	-9,0	6,22	0,1
Languedoc-Roussillon	7.176	-10,1	34.864	-14,1	4,86	-4,4
Igp-Vin de Pays	65.236	-7,7	182.497	-5,5	2,80	2,4
Varietals	16.828	-1,1	43.860	1,2	2,61	2,4
Common wines	18.006	-21,9	35.901	-22,5	1,99	-0,8
Others	32.940	-8,2	175.344	-11,8	5,32	-3,9
Bottled total	215.120	-9,3	1.215.415	-14,9	5,65	-6,2
2-10 litres	9.950	1,5	24.366	-13,1	2,45	-14,4
Bulk	44.488	-8,9	56.943	6,5	1,28	17,0
Total export	306.431	-8,4	1.952.217	-11,0	6,37	-2,9

Champagne

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
USA	3.850	23,3	127.413	25,9	26,30	-18,9
UK	2.960	-45,8	72.226	-40,1	40,71	84,4
Singapore	1.869	-25,4	60.554	-18,7	39,87	34,0
Japan	1.317	21,0	48.438	23,5	29,80	-17,4
Germany	1.407	2,7	33.902	2,2	23,58	-2,6
Italy	741	-9,6	23.232	-12,1	35,69	10,6
Belgium	922	1,3	17.962	-15,5	23,05	-1,3
Switzerland	548	-9,1	16.394	-15,0	35,24	10,0
UA Emirates	424	12,4	15.418	13,6	32,04	-11,1
Spain	430	-7,4	13.348	-5,8	32,94	8,0
Sweden	507	20,0	11.525	16,1	19,59	-16,7
Australia	525	-18,8	10.956	-20,6	26,29	23,1
Canada	293	7,6	9.912	10,4	30,67	-7,1
Netherlands	308	6,4	9.866	17,5	27,24	-6,0
South Ko a	212	0,7	6.899	8,5	30,00	-0,7
Austria	219	3,8	6.618	5,7	28,65	-3,7
Mexico	266	175,7	6.417	170,1	8,92	-63,7
South Africa	185	-0,3	6.184	6,0	31,59	0,3
Hong Kong	186	4,4	5.067	-16,3	32,48	-4,2
Russia	162	1,3	4.557	6,9	26,27	-1,2



SPANISH EXPORTS IN Q1

Sparkling

	Litres		Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
USA	4.862.677	7,7	15.054.991	5,4	3,10	-2,2
Germany	8.121.920	26,5	11.660.056	14,6	1,44	-9,4
Belgium	3.663.892	-3,2	9.781.264	-7,5	2,67	-4,4
UK	4.226.255	5,2	7.930.846	-19,1	1,88	-23,1
Japan	2.231.792	-20,4	7.202.765	-19,2	3,23	1,4
Sweden	1.704.659	46,2	6.334.185	52,4	3,72	4,2
France	5.002.324	-25,3	5.667.848	-16,3	1,13	12,1
Canada	563.301	17,4	2.819.497	26,2	5,01	7,5
Netherlands	654.422	-16,0	2.684.552	4,1	4,10	24,0
Finland	510.340	-21,8	2.117.236	-15,3	4,15	8,3
Mexico	792.687	109,2	1.253.373	85,0	1,58	-11,6
Switzerland	287.799	-25,9	1.105.161	-42,5	3,84	-22,4
Poland	375.678	8,4	945.411	0,3	2,52	-7,4
Brazil	344.184	54,0	923.157	43,1	2,68	-7,1
Norway	190.218	-28,2	868.461	-16,0	4,57	17,0
Denmark	212.986	-2,7	830.912	8,8	3,90	11,8
Italy	552.415	338,5	570.144	66,4	1,03	-62,0
China	288.006	-30,5	536.963	-31,0	1,86	-0,7
Portugal	781.589	273,1	498.364	43,9	0,64	-61,4
South Korea	111.140	-52,5	354.101	-51,0	3,19	3,1
Russia	65.992	121,2	322.378	-1,8	4,89	-55,6
Austria	118.454	-18,2	307.577	-8,4	2,60	12,0
Others	3.915.859	-34,0	9.988.111	-5,3	2,55	43,4
Total	39.578.588	-1,6	89.757.352	-1,8	2,27	-0,2

spectacularly by 10 percent, given the huge quantities sent to the USA (importers stocked up in view of the threat of new duties), with Reims seeing sales drop sharply in the UK (due to stockpiling in March 2019 in view of the Brexit window) and even more so in Singapore. The Japanese market is holding up, the German one is stable, while the Italian market has fallen by 10 percent. As for still wines, the first quarter of the year saw a downturn on the four main markets, with the USA at -15 percent (from the effect of duties), while the only positive market was the Canadian one. The situation in Bordeaux is dramatic, where the 10 main markets are in decline, with spikes of -26 percent in China and -17 percent in the UK. Their cousins in Burgundy are faring no better, where

the only development on big markets is in Japan, with decreases of over 10 percent in the USA and the UK and a general balance of -3 percent. The lower-classified wines show reductions of 10 percent for all the main AOPs, except for Alsace, and closure below 8 percent for Vins de Pays. Spain got off to a really bad start this year, with a marked fall in bottled wine (-8 percent) and bulk wine (-15 percent, with a 9 percent erosion of turnover). Sparkling wines are holding up, thanks to a good performance in the USA, recovery in Germany (which saw a downturn this time last year) and also the UK. Belgium is going badly and Japan is even worse, where the drive of EU's FTAs seems to have exhausted itself. Bottled wine decreased on all the main markets, ex-

cept for Canada and France, with limited damage for now on the American front, despite the application of new duties. Bulk wine has slightly recovered in value, but quotation prices are really low, between 40 and 50 cents per litre, with a partial recovery compared to the 2019 slump. Germany is coping better, with the only clear decline in the USA (due to duties) and the UK, while continental markets are doing well, from the Netherlands to Switzerland, Poland and Czech Republic. Sparkling wines are struggling, with a significant downturn in France, Norway, the USA and Czech Republic and modest development in Austria and Switzerland: average prices have fallen dramatically, by over 13 percent.

Continued on Page 31 ➡

Bottled

	Litres		Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
USA	10.906.828	-3,7	53.036.337	2,8	4,86	6,7
UK	18.725.124	-11,0	50.493.396	-6,2	2,70	5,3
Germany	21.302.218	-0,3	47.722.369	2,3	2,24	2,6
Switzerland	3.770.429	-1,3	25.167.964	-1,0	6,68	0,2
Canada	4.975.498	2,8	22.180.238	12,8	4,46	9,8
Netherlands	7.958.202	-12,6	18.803.554	-5,8	2,36	7,8
China	8.793.302	-31,7	16.542.704	-38,4	1,88	-9,8
France	12.239.702	2,6	13.028.104	-18,5	1,06	-20,6
Mexico	3.702.696	-3,4	11.936.969	-1,4	3,22	2,0
Japan	4.027.138	-21,3	9.496.730	-16,5	2,36	6,0
Portugal	20.598.121	-18,8	9.401.851	-25,9	0,46	-8,8
Sweden	2.328.269	19,7	8.975.379	17,8	3,85	-1,6
Belgium	2.537.359	-6,7	7.797.861	-7,2	3,07	-0,6
Denmark	2.597.510	13,3	6.153.055	12,8	2,37	-0,4
Ireland	1.836.661	22,7	5.418.567	14,5	2,95	-6,7
Norway	764.044	3,6	4.582.497	28,7	6,00	24,3
Poland	1.955.285	-11,8	3.903.791	-5,0	2,00	7,6
South Korea	1.357.070	-2,9	3.485.030	0,6	2,57	3,6
Brazil	1.397.532	36,1	3.450.483	21,2	2,47	-10,9
Russia	2.063.866	3,9	3.039.950	-4,0	1,47	-7,6
Italy	2.841.090	18,1	2.283.382	4,2	0,80	-11,7
Hong Kong	508.663	-16,1	2.218.246	-34,7	4,36	-22,2
Ukraine	1.116.043	69,3	2.192.502	89,4	1,96	11,9
Finland	845.275	0,6	2.115.312	-7,8	2,50	-8,4
Czech. R.	1.839.749	1,2	2.058.082	-8,2	1,12	-9,3
Austria	281.236	-4,3	1.358.833	-2,8	4,83	1,6
Others	24.060.399	-8,4	47.518.939	-8,2	1,97	0,2
Total	165.329.308	-7,8	384.362.125	-4,9	2,32	3,2

Bulk

	Litres		Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
France	100.761.080	-9,4	39.367.102	-6,8	0,39	2,8
Germany	58.502.369	-4,6	23.649.824	6,8	0,40	12,0
Portugal	31.768.229	-5,7	15.625.892	8,3	0,49	14,8
Italy	15.152.543	-18,3	7.653.950	-16,7	0,51	2,0
Russia	8.176.047	-56,1	4.051.513	-54,6	0,50	3,6
Denmark	2.387.444	-20,3	1.678.667	-13,5	0,70	8,6
UK	2.815.271	-19,5	1.582.620	-31,3	0,56	-14,7
Belgium	2.403.582	-13,9	1.277.971	-5,8	0,53	9,4
China	2.407.574	-6,6	1.275.945	-1,6	0,53	5,3
Switzerland	2.081.994	7,8	1.074.732	-3,2	0,52	-10,3
Netherlands	1.471.353	-3,6	1.021.561	-12,5	0,69	-9,2
Canada	1.755.297	-52,1	890.660	-57,9	0,51	-12,1
USA	767.476	17,6	814.570	-4,1	1,06	-18,4
Czech. R.	1.659.649	286,6	788.432	118,8	0,48	-43,4
Sweden	728.297	-8,8	698.300	-18,7	0,96	-10,8
Finland	725.566	-4,3	522.467	-12,5	0,72	-8,6
Mexico	544.843	42,4	438.947	37,1	0,81	-3,7
Japan	493.435	-0,1	307.039	-4,8	0,62	-4,7
Norway	267.833	24,4	292.434	14,1	1,09	-8,3
Poland	41.897	-58,0	38.979	-23,1	0,93	83,0
Others	23.450.567	-35,6	13.075.052	-19,2	0,56	25,5
Total	258.362.345	-14,6	116.126.657	-9,3	0,45	6,3

Bordeaux

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Hong Kong	1.077	-14,6	51.862	-26,0	48,17	-13,3
UK	3.410	-17,2	46.306	-38,7	13,58	-26,0
USA	3.786	-13,3	45.795	-29,9	12,10	-19,1
China	5.140	-25,9	32.775	-37,0	6,38	-15,0
Switzerland	1.085	-21,5	30.663	-23,0	28,26	-2,0
Japan	3.101	-5,1	23.800	-16,0	7,68	-11,5
Belgium	3.145	-13,8	21.793	-26,9	6,93	-15,3
Germany	2.852	-7,2	19.002	-29,8	6,66	-24,3
Canada	1.375	-9,4	11.345	-19,4	8,25	-11,1
Singapore	332	7,4	6.417	-9,4	19,31	-15,7

Burgundy

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
USA	2.630	-10,5	35.862	-30,9	13,64	-22,8
UK	1.993	-14,8	27.269	-13,8	13,68	1,1
Japan	1.313	16,8	25.577	20,7	19,48	3,3
Canada	1.349	2,4	14.327	13,1	10,62	10,5
Hong Kong	178	-6,4	14.023	-10,4	78,94	-4,2
Switzerland	268	-12,4	10.771	-31,5	40,14	-21,8
Belgium	783	-20,7	7.058	-8,3	9,02	15,7
Sweden	865	36,1	6.637	35,8	7,67	-0,2
Germany	482	2,4	6.445	-1,7	13,38	-4,0
Denmark	363	23,5	5.840	12,0	16,11	-9,4
China	208	-36,0	4.266	-19,1	20,49	26,4

Bottled wines (no sparkling)

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
USA	32.300	-14,6	223.437	-25,1	6,92	-12,3
UK	34.000	-5,9	154.333	-19,7	4,54	-14,7
Germany	27.102	-6,7	91.529	-9,8	3,38	-3,3
Japan	10.467	-2,3	80.083	3,5	7,65	5,9
Canada	12.710	3,2	76.224	4,4	6,00	1,2
Hong Kong	2.098	-7,7	76.197	-22,4	36,32	-15,9
Belgium	18.219	-17,5	70.387	-17,9	3,86	-0,4
China	14.764	-39,1	63.063	-36,9	4,27	3,7
Switzerland	4.043	-12,9	60.882	-20,7	15,06	-9,0
Netherlands	19.222	-6,9	52.846	-7,8	2,75	-1,0
Sweden	6.180	9,3	27.095	13,3	4,38	3,7
Denmark	3.452	-0,4	21.254	2,0	6,16	2,4
South Korea	1.373	5,2	14.451	15,6	10,52	9,9
Singapore	819	20,0	13.592	-2,1	16,60	-18,4
Poland	5.192	-0,6	13.511	2,2	2,60	2,9
Ireland	2.574	36,2	8.479	13,1	3,29	-16,9
Italy	848	-8,7	6.053	-18,7	7,13	-11,0
Czech R.	1.708	7,4	5.328	-6,4	3,12	-12,9
Norway	469	-34,8	3.844	-36,3	8,20	-2,2
Brazil	958	35,2	3.569	-0,3	3,73	-26,3
Russia	415	180,0	1.806	-2,4	4,35	-65,1
Others	16.207	9,4	147.453	-2,2	9,10	-10,6
Total	215.120	-9,3	1.215.415	-14,9	5,65	-6,2



	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Netherlands	14.480	12,1	28.691	12,5	1,98	0,3
UK	10.406	-9,1	26.313	2,2	2,53	12,5
Usa	4.200	-5,8	14.997	-22,7	3,57	-18,0
Poland	5.175	12,1	13.397	8,8	2,59	-2,9
Switzerland	1.782	6,8	9.912	-4,2	5,56	-10,3
Norway	1.635	-5,6	9.557	-13,6	5,85	-8,5
Czech R.	2.936	6,8	6.519	10,8	2,22	3,7
Belgium	2.714	-4,5	5.841	1,5	2,15	6,3
Austria	1.277	-15,4	4.683	-7,6	3,67	9,2
Denmark	1.302	-13,0	4.258	8,6	3,27	24,8
Sweden	1.563	-10,7	4.090	8,6	2,62	21,6
Japan	689	-15,6	3.996	-6,5	5,80	10,8
Hong Kong	155	-20,4	3.573	-39,1	22,99	-23,5
Ireland	1.507	13,7	3.294	15,7	2,19	1,8
China	612	-12,9	3.280	-19,4	5,36	-7,5
France	1.133	-28,7	2.768	-30,9	2,44	-3,1
Canada	718	-11,0	2.707	-9,3	3,77	1,9
Finland	917	-34,3	2.255	-12,2	2,46	33,7
Russia	669	51,9	1.811	4,8	2,71	-31,0
Slovakia	702	45,8	1.364	50,4	1,94	3,2
Ukraine	411	175,1	1.263	127,6	3,07	-17,3
Italy	347	22,8	1.094	-9,8	3,15	-26,6
Singapore	75	-26,0	603	-15,9	8,02	13,6
Hungary	240	4,2	572	4,4	2,38	0,2
South Korea	107	-5,7	419	-25,3	3,93	-20,8
Mexico	108	79,9	271	62,3	2,52	-9,8
Luxembourg	44	-18,5	231	-21,2	5,24	-3,3
Brazil	24	32,0	71	0,0	3,02	-24,3
Others	4.216	-18,4	13.075	-16,4	3,10	2,5
Total	60.141	-1,6	170.905	-3,9	2,84	-2,3

Sparkling

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Austria	1.363	5,6	2.482	-12,5	1,82	-17,1
France	752	-3,9	1.458	-38,4	1,94	-35,8
Norway	123	-24,0	1.229	-27,8	10,00	-5,0
Switzerland	261	27,8	1.172	16,6	4,49	-8,8
USA	265	-3,8	920	-40,3	3,47	-37,9
Czech R.	443	-25,4	748	-29,0	1,69	-4,9
Luxembourg	335	3,0	731	8,5	2,19	5,2
UK	24	26,7	728	93,1	30,08	52,4
Canada	155	-15,6	681	-9,6	4,40	7,2
Netherlands	86	-11,9	633	-22,5	7,39	-12,0
Poland	214	152,8	561	127,1	2,62	-10,2
Denmark	34	-21,7	483	-11,9	14,08	12,6
Japan	17	-68,1	378	-35,3	21,98	103,2
Finland	63	-8,4	267	4,7	4,22	14,3
Russia	32	1,0	247	-11,8	7,82	-12,6
Ukraine	29	-48,3	231	-34,2	8,11	27,2
Hong Kong	7	9,7	224	23,8	32,94	12,8
Belgium	45	-46,4	214	-35,0	4,80	21,3
China	54	-68,8	187	-63,5	3,44	17,1
Italy	26	-17,8	138	-62,5	5,25	-54,4
Hungary	50	49,7	110	35,8	2,19	-9,3
Sweden	22	-55,4	75	-45,7	3,42	21,8
Others	1.237	2,1	6.609	-12,6	5,34	-14,4
Total	5.637	-3,8	20.506	-16,5	3,64	-13,2

Bulk

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Switzerland	226	-20,3	365	-25,8	1,62	-6,9
USA	133	523,9	351	475,4	2,64	-7,8
Norway	123	219,5	327	165,9	2,66	-16,8
France	244	13,5	228	11,8	0,94	-1,5
Finland	199	201,2	194	123,0	0,97	-26,0
Denmark	73	-1,6	105	-11,0	1,44	-9,5
Netherlands	75	36,3	96	18,5	1,28	-13,0
Czech R.	60	-31,7	61	-14,1	1,01	25,7
Canada	72	0,0	53	8,2	0,74	8,2
UK	51	-72,0	31	-73,5	0,61	-5,4
Others	838	-12,4	684	-8,2	0,82	4,8
Total	2.093	2,1	2.495	16,2	1,19	13,8



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USA and Latin America

Let's change continent and turn to America. The United States closed a difficult first quarter, not only due to the relatively small Chinese market, but especially in the UK, Hong Kong and Japan. Trade to their first market destination, Canada, is recovering and there has been a good performance

on secondary markets, such as South Korea, which partly makes up for losses suffered in Denmark, Sweden, France and Mexico. As for bulk wine, there has been a strong downturn on the main market, the British one, but also on all the secondary markets, with the only exception of Belgium, Den-

mark and a strong recovery in Canada. Then we come to South America: despite forced closure in China, the general balance for Chile is stable at +4 percent, thanks to moderate performance in the UK and USA and even better in Japan (+23 percent) and Brazil (+29 percent).

Turnover is stable, thanks to a slight lowering of their prices. Beijing's contribution was lacking (-50 percent) for bulk wine, so most trade is directed towards the USA and the UK, but both volume and especially turnover are undergoing a strong downturn, weighed down by price decreases of an

average of 16 percent. Argentine exports are also at a standstill, especially in value, down 6 percent on last year. The USA is stable and Canada is positive, while things aren't going particularly well in Europe and Latin America, with the additional loss of -23 percent suffered in China, their seventh

market in terms of value. As for bulk wine, thanks to price cuts worthy of a summer sale (-50 percent on average), large quantities of wine have been sent all over the world, starting with Spain (at 20 cents), thus implementing a thinning out of wineries that is necessary for the general system to survive.

EXPORTS FROM THE USA IN Q1						
	Thousand litres		Thousand \$		\$/litre	
	2020	% change	2020	% change	2020	% change
UK	26.622	-20,6	36.395	-7,2	1,37	17,0
Belgium	4.728	-0,9	4.442	2,9	0,94	3,9
Germany	2.946	-21,4	3.628	2,1	1,23	29,9
France	1.640	-11,7	2.498	25,6	1,52	42,3
Japan	1.801	-50,2	2.467	-58,8	1,37	-17,3
Denmark	2.248	3,8	2.142	3,0	0,95	-0,8
Canada	2.315	135,1	2.064	88,0	0,89	-20,0
Others	3.914	20,0	4.381	-20,5	1,12	-33,7
Total	46.214	-14,3	58.017	-9,0	1,26	6,3

	Thousand litres		Thousand \$		\$/litre	
	2020	% change	2020	% change	2020	% change
Canada	11.114	6,6	83.622	5,8	7,52	-0,7
Japan	1.435	-4,1	17.200	24,3	11,99	29,6
UK	1.864	-11,9	15.232	14,0	8,17	29,4
Hong Kong	1.446	-21,9	10.795	-56,5	7,46	-44,3
Denmark	958	-13,9	8.489	16,6	8,86	35,4
South Korea	1.119	13,7	8.050	44,5	7,19	27,0
Sweden	725	-24,0	6.004	27,7	8,28	68,1
Mexico	549	-47,2	4.031	-1,5	7,34	86,4
France	673	-19,1	3.679	-41,4	5,47	-27,6
China	563	-50,6	3.592	-42,1	6,38	17,3
Switzerland	364	-44,4	3.222	23,8	8,86	122,6
Belgium	244	30,7	2.734	7,4	11,19	-17,8
Taiwan	377	37,6	2.726	18,1	7,23	-14,2
Netherlands	256	-7,4	2.106	45,3	8,24	56,9
Germany	241	-41,9	1.959	-32,4	8,14	16,4
Singapore	195	-21,4	1.720	-12,5	8,83	11,3
Philippines	512	-30,1	1.607	-22,7	3,14	10,6
Others	5.963	7,5	34.853	14,9	5,84	6,9
Total	28.595	-5,6	211.621	0,1	7,40	6,0

CHILEAN EXPORTS IN Q1						
ARGENTINIAN EXPORTS IN Q1						

	Thousand litres		Thousand \$		\$/litre	
	2020	% change	2020	% change	2020	% change
China	13.044	-26,6	48.202	-20,2	3,70	8,8
UK	12.279	7,0	35.218	10,8	2,87	3,6
Japan	12.766	23,4	34.917	19,5	2,74	-3,2
USA	11.156	5,4	34.040	1,3	3,05	-3,9
Brazil	13.052	28,5	33.891	17,7	2,60	-8,4
Netherlands	6.227	-8,3	18.723	-5,8	3,01	2,8
Canada	4.597	14,8	16.976	13,0	3,69	-1,6
South Korea	3.391	6,6	13.078	-4,4	3,86	-10,3
Ireland	3.038	21,6	8.850	13,5	2,91	-6,7
Germany	3.245	4,1	8.813	-4,4	2,72	-8,1
Mexico	3.182	-2,0	8.744	-8,2	2,75	-6,4
Denmark	2.076	16,7	7.510	13,9	3,62	-2,4
Russia	2.860	20,0	6.871	8,6	2,40	-9,5
Colombia	2.248	38,4	5.840	43,0	2,60	3,3
Belgium	1.151	-30,2	3.425	-39,3	2,98	-13,0
Sweden	1.043	-7,4	3.312	-7,2	3,17	0,2
Finland	1.109	-9,4	3.258	-15,8	2,94	-7,1
Paraguay	1.019	-24,7	2.654	-27,5	2,60	-3,7
France	500	29,7	1.596	13,3	3,19	-12,6
Others	15.024	4,5	48.971	-0,1	3,26	-4,4
Total	113.007	3,6	344.889	0,5	3,05	-3,0

	Litres		\$		\$/litre	
	2020	% change	2020	% change	2020	% change
USA	12.169.507	1,6	54.814.802	1,1	4,50	-0,4
UK	6.280.843	-11,4	21.313.914	-14,5	3,39	-3,5
Canada	3.334.100	7,7	13.832.571	4,8	4,15	-2,7
Brazil	2.840.939	0,9	8.794.463	-7,8	3,10	-8,7
Netherlands	1.763.608	-3,4	6.235.313	-2,0	3,54	1,4
China	654.760	-22,5	2.998.244	-25,2	4,58	-3,5
Switzerland	510.314	-6,0	2.751.978	1,0	5,39	7,4
Mexico	783.579	-9,5	2.569.511	-19,9	3,28	-11,5
Germany	551.418	-9,5	2.555.086	-9,6	4,63	-0,1
Peru	467.618	-11,7	2.010.082	-22,0	4,30	-11,8
Colombia	582.524	8,4	1.877.453	-0,9	3,22	-8,6
Ireland	582.204	-26,5	1.765.040	-31,0	3,03	-6,2
Denmark	429.510	-12,4	1.643.860	-30,1	3,83	-20,2
Japan	388.115	-6,3	1.571.800	-22,9	4,05	-17,7
Russia	605.981	5,8	1.557.643	-18,9	2,57	-23,4
Sweden	355.696	-26,7	1.452.735	-20,1	4,08	9,0
France	321.005	-19,8	1.443.693	-22,6	4,50	-3,5
Belgium	304.739	-9,4	1.224.455	3,8	4,02	14,6
Paraguay	308.931	-38,2	760.615	-57,0	2,46	-30,4
Finland	183.133	-9,9	712.977	-14,4	3,89	-5,0
Others	4.933.072	8,0	19.716.638	-1,7	4,00	-8,9
Total	38.351.596	-2,9	151.602.873	-6,3	3,95	-3,5

	Thousand litres		Thousand \$		\$/litre	
	2020	% change	2020	% change	2020	% change
USA	26.108	10,1	20.759	-16,2	0,80	-23,9
UK	17.175	2,4	15.372	-5,9	0,90	-8,1
China	11.280	-47,1	10.612	-54,7	0,94	-14,5
Germany	8.275	10,2	6.719	-11,5	0,81	-19,7
Japan	5.802	-3,6	4.806	-16,8	0,83	-13,7
Denmark	2.881	0,9	3.582	2,9	1,24	2,0
Canada	4.015	-20,1	2.743	-34,8	0,68	-18,4
France	2.681	5,0	2.106	-19,0	0,79	-22,9
Netherlands	1.482	-33,1	1.296	-43,0	0,87	-14,9
Sweden	576	60,0	969	50,9	1,68	-5,7
Belgium	639	-18,5	619	-36,7	0,97	-22,3
Finland	456	11,8	460	5,2	1,01	-5,9
Spain	456	1,3	389	-3,1	0,85	-4,4
Others	1.698	-67,6	1.139	-70,1	0,67	-7,7
Total	83.524	-12,3	71.572	-26,0	0,86	-15,7

	Litres		\$		\$/litre	
	2020	% change	2020	% change	2020	% change
Spain	35.024.490		6.526.605		0,19	-85,1
UK	5.544.920	73,7	6.472.929	22,2	1,17	-29,6
Canada	7.528.690	33,4	2.608.903	-11,2	0,35	-33,4
USA	1.076.900	-85,4	1.352.527	-59,8	1,26	175,2
Denmark	982.000	51,5	590.056	-17,7	0,60	-45,7
France	888.000	98,2	581.796	19,2	0,66	-39,9
Germany	696.000	-17,1	565.566	-55,0	0,81	-45,7
Russia	1.345.382	-24,3	370.767	-18,2	0,28	8,1
Belgium	192.000	-65,2	119.044	-80,5	0,62	-44,0
Netherlands	72.000		84.264		1,17	
Japan	23.000	-47,7	19.379	-52,9	0,84	-10,0
Others	19.903.514	247,4	5.494.610	137,6	0,28	-31,6
Total	73.276.896	178,5	24.786.446	41,1	0,34	-49,3



## SOUTH AFRICAN EXPORTS IN Q1

### Bottled

	Litres		Rand		Rand/litre	
	2020	% change	2020	% change	2020	% change
UK	5.491.176	-22,3	244.920.090	-8,7	44,60	17,5
Netherlands	3.672.745	16,2	155.367.932	31,2	42,30	12,9
Germany	3.464.051	-21,3	145.506.392	1,5	42,00	28,9
USA	2.180.030	29,0	140.209.152	30,9	64,32	1,4
Canada	1.453.314	-0,1	87.168.056	13,8	59,98	13,9
Namibia	5.136.259	22,0	85.925.351	-1,0	16,73	-18,9
China	1.008.521	-19,8	80.873.770	-6,3	80,19	16,8
Belgium	1.048.749	60,3	49.147.993	18,3	46,86	-26,2
United Arab Em.	684.212	27,7	48.216.021	55,3	70,47	21,7
Sweden	641.828	-16,4	39.685.379	-2,7	61,83	16,4
Japan	539.193	15,6	36.331.103	26,9	67,38	9,7
Kenya	615.851	116,6	25.317.253	136,1	41,11	9,0
Russia	641.280	-51,0	24.204.673	-40,4	37,74	21,6
Tanzania	594.151	36,7	21.356.922	30,0	35,95	-4,9
Denmark	341.094	-10,8	18.482.985	-13,0	54,19	-2,4
Finland	228.622	-27,8	9.183.976	-22,3	40,17	7,5
Others	6.036.577	-4,6	274.913.392	2,8	45,54	7,7
Total	33.777.653	-2,7	1.486.810.440	6,4	44,02	9,4



## South Africa and Oceania

South Africa, on the other hand, has seen shipments of bulk wine collapse: -50 percent in the volume balance in March, caused by two consecutive low vintages, which made prices surge to over double those in the same period in 2019. Bottled wine has performed very badly in the UK and Germany, but makes up for it with good development on the Dutch and American markets. At the end, the general balance limits the damage, thanks to a more contained price increase than for bulk wine, which brought the value balance to +6 percent. Lastly, as regards bag-in-box wines, constant erosion

on the Swedish market is being made up for by the entrance of new markets, especially Germany, the United Arab Emirates and France. A total positive balance of 8% in volume and 14 percent in value. Let's close the review with Oceanian suppliers: the Australian situation remains critical. The losses suffered in China (and Hong Kong) have been added to by the now consolidated ones in the UK, USA and Canada, and aggravated by the negative trend for bulk. They are trying out new roads, like Singapore and Malaysia, but the situation remains strained, especially for future prospects, if the Chinese

market should not restart and return to pre-Covid levels of development. The situation is rosier in New Zealand. Though with a negative general volume balance, turnover has grown, especially in key markets (the United States and UK). Growth has reached double figures also on the Canadian and Dutch markets, while suffering heavy losses in China, although they have been affected less than their Australian cousins. Trade of cisterns is progressing at a steady pace, especially to the UK, Australia and new European markets, such as Germany and France.



## NEW ZEALAND'S EXPORTS IN Q1

### Bottled

	Thousand litres		Thousand nzd		NZD/litre	
	2020	% change	2020	% change	2020	% change
USA	13.695	5,9	119.051	11,8	8,69	5,5
UK	8.961	5,4	72.547	22,0	8,10	15,8
Australia	5.478	-28,6	41.021	-27,1	7,49	2,0
Canada	2.881	20,0	31.633	25,9	10,98	4,9
Netherlands	808	7,7	6.628	15,5	8,21	7,3
Ireland	640	-6,3	5.397	-3,6	8,43	2,9
China	324	-47,0	4.629	-36,5	14,29	19,7
Japan	328	29,2	4.554	50,8	13,87	16,7
Singapore	258	10,0	3.829	6,5	14,82	-3,2
Germany	479	-6,7	3.670	-2,2	7,65	4,8
Sweden	396	7,8	3.486	19,0	8,81	10,4
Hong Kong	236	-9,7	3.009	-4,5	12,77	5,8
France	151	-13,3	2.507	3,2	16,62	19,1
Denmark	222	6,2	1.881	13,6	8,47	7,0
United Arab E.	84	7,7	1.261	10,0	15,01	2,1
Others	1.722	-1,2	15.798	8,3	9,17	9,7
Total	36.663	-1,9	320.901	6,2	8,75	8,2

### Bulk

	Thousand litres		Thousand NZD		NZD/litre	
	2020	% change	2020	% change	2020	% change
USA	11.163	-5,1	56.434	7,3	5,06	13,0
UK	12.904	6,0	48.630	9,7	3,77	3,5
Australia	9.044	69,6	37.446	81,8	4,14	7,2
Germany	2.911	59,4	11.776	59,0	4,05	-0,2
France	1.704	54,5	6.362	59,6	3,73	3,3
Belgium	288	-77,5	1.258	-72,0	4,37	24,3
Denmark	240	11,1	927	10,0	3,86	-1,0
Netherlands	216	-75,0	746	-72,4	3,46	10,6
Others	764	59,2	3.005	61,1	3,93	1,2
Total	39.234	12,0	166.584	20,0	4,25	7,2

### Bulk

	Litres		Rand		Rand/litre	
	2020	% change	2020	% change	2020	% change
UK	8.856.081	-3,7	177.205.317	84,3	20,01	91,4
Germany	5.419.610	-28,2	62.783.240	-18,9	11,58	12,9
Denmark	2.359.844	-10,3	46.500.409	2,4	19,70	14,1
France	2.029.677	4,4	20.361.730	7,7	10,03	3,1
Sweden	1.066.326	-26,0	11.132.785	-30,0	10,44	-5,4
Netherlands	808.344	-53,7	8.797.470	-49,3	10,88	9,4
Belgium	809.421	310,2	8.241.511	331,8	10,18	5,3
Canada	669.389	-97,0	6.384.057	-20,1	9,54	
Namibia	86.327	-63,3	5.624.511	-6,8	65,15	154,2
USA	287.660	-29,7	4.281.841	-12,6	14,89	24,4
Kenya	372.920	142,4	4.202.145	149,8	11,27	3,1
Russia	48.120	103,4	783.456	192,0	16,28	43,6
Mozambique	27.069	-70,8	649.005	-41,5	23,98	100,3
Others	4.225.485	20,5	58.754.978	30,6	13,90	8,4
Total	27.066.273	-47,8	415.702.455	22,2	15,36	134,0

### 2-10 litres

	Litres		Rand		Rand/litre	
	2020	% change	2020	% change	2020	% change
Svezia	1.007.859	-30,2	24.882.470	-24,4	24,69	8,3
Germania	1.618.737	82,7	16.220.678	67,2	10,02	-8,5
Em. Arabi Uniti	681.140	23,9	16.150.873	24,3	23,71	0,3
Francia	1.215.740	37,3	14.066.586	61,3	11,57	17,5
Namibia	760.429	-39,9	11.657.705	-30,4	15,33	15,8
Danimarca	459.934	10,4	6.199.631	1,3	13,48	-8,2
UK	362.229	-7,1	5.849.136	16,0	16,15	24,8
Canada	304.816	52,1	4.449.285	53,2	14,60	0,7
Finlandia	142.980	-21,9	2.851.443	-10,4	19,94	14,8
Cina	91.663	61,1	2.089.949	85,1	22,80	14,9
Belgio	105.068	-85,5	2.068.731	-65,8	19,69	136,3
Altri	2.574.170	55,0	55.506.367	54,0	21,56	-0,6
Totale	9.324.765	7,6	161.992.854	14,4	17,37	6,3



## AUSTRALIAN EXPORTS IN Q1

### Bottled

	Thousand litres		Thousand AUD		AUD/litre	
	2020	% change	2020	% change	2020	% change
China	15.558	-16,2	146.865	-6,5	9,44	11,5
USA	15.991	-8,8	72.293	-1,4	4,52	8,2
UK	8.562	-6,6	38.423	-2,7	4,49	4,2
Canada	5.071	-22,1	29.404	-10,4	5,80	15,1
Singapore	2.294	94,1	19.530	32,6	8,51	-31,7
Hong Kong	1.256	-26,7	14.029	-43,1	11,17	-22,4
New Zealand	2.937	25,1	13.761	26,4	4,69	1,0
Malaysia	738	28,4	9.794	58,7	13,28	23,6
Netherlands	1.906	-34,4	9.060	-9,4	4,75	38,1
Japan	1.254	-16,9	6.549	-23,5	5,22	-8,0
Denmark	1.823	94,9	6.406	104,5	3,51	4,9
Sweden	993	0,0	5.422	20,6	5,46	20,6
South Korea	716	-6,5	5.158	-2,9	7,20	3,9
United AE	579	-34,6	4.757	-37,2	8,21	-3,9
Taiwan	498	39,6	4.282	41,7	8,61	1,5
Germany	574	-42,2	2.855	-18,5	4,98	40,9
Ireland	501	14,6	1.880	18,8	3,76	3,7
Others	5.154	0,2	29.181	4,6	5,66	4,4
Total	66.404	-8,4	419.649	-3,4	6,32	5,5

### Bulk

	Thousand litres		Thousand AUD		AUD/litre	
	2020	% change	2020	% change	2020	% change
UK	44.935	-3,1	56.210	6,1	1,25	9,6
China	5.098	-23,3	19.969	7,5	3,92	40,3
USA	13.646	4,6	18.865	5,2	1,38	0,6
Belgium	6.420	98,7	8.527	102,9	1,33	2,1
Canada	4.397	-10,7	5.586	-7,5	1,27	3,6
Denmark	3.769	202,2	5.412	268,9	1,44	22,1
New Zealand	2.060	-23,7	3.344	-0,9	1,62	29,8
Netherlands	2.436	-53,5	3.165	-52,9	1,30	1,1
Finland	1.441	8,7	1.946	1,2	1,35	-6,9
Japan	1.107	-37,9	1.342	-39,1	1,21	-1,8
Germany	1.271	-1,9	985	-36,5	0,78	-35,3
Sweden	504	80,0	923	83,1	1,83	1,8
Norway	168	-22,2	250	-20,4	1,49	2,4
France	120	150,0	153	188,7	1,27	15,5
Italy	24	-90,9	39	-81,4	1,63	104,3
Others	407	-40,1	682	-50,9	1,68	-18,1
Total	87.803	-1,7	127.398	6,7	1,45	8,5

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The balance stands at +5 percent in value and +6 percent in volume, but performance is conditioned by early collection of products due to Covid (in Germany) and stockpiling for fear of new duties (USA). Drastic reductions in the East, while Prosecco is falling in the UK. With the domestic market convalescing, this pace is too slow. The wine year could risk closing with 5 million hectolitres more than in 2019

ITALIAN WINE EXPORT BY TYPE IN Q1

	Litres			Euro			Euro/litre		
	2019	2020	% change	2019	2020	% change	2019	2020	% change
Sparkling wines	80.770.352	96.283.672	19,2	321.786.834	330.701.648	2,8	3,98	3,43	-13,8
Bottled wines < 2 litres	282.065.173	288.415.227	2,3	1.006.618.705	1.064.557.893	5,8	3,57	3,69	3,4
- Frizzanti	36.974.152	40.395.135	9,3	90.663.503	96.441.593	6,4	2,45	2,39	-2,6
- Still wines	241.561.544	244.869.551	1,4	883.089.344	945.384.294	7,1	3,66	3,86	5,6
- Sweet and fortified wines	1.479.254	1.554.536	5,1	13.437.363	13.078.394	-2,7	9,08	8,41	-7,4
2-10 litres wines	10.405.854	11.478.164	10,3	22.147.381	23.086.652	4,2	2,13	2,01	-5,5
Bulk wines	105.627.691	110.847.739	4,9	74.354.608	79.415.808	6,8	0,70	0,72	1,8
Must	6.855.277	7.921.577	15,6	11.617.359	11.564.282	-0,5	1,69	1,46	-13,9
Total export	485.724.347	514.946.379	6,0	1.436.524.887	1.509.326.283	5,1	2,96	2,93	-0,9

ITALIAN EXPORTS IN THE FIRST QUARTER

INSUFFICIENT GROWTH

by CARLO FLAMINI

Italy's export performance has never needed to be examined so closely before this year. There are too many factors in play that, if not brought to light, risk making the whole picture incomprehensible, if not downright misleading. What are these factors? Obviously, we instinctively think of Covid, but taking a better look (we are talking about exports in the first quarter, therefore up to March), the epidemic only affected the countries that experienced it first: in order, China, South Korea and Japan. All these show significant negative variations, as already happened for other countries, such as France, Australia, Chile and Spain, which we discussed in the last issue of *Corriere Vinicolo*. Italy is following this trend. In China, -44 percent volume of still and semi-sparkling bottled wine, associated with -40 percent in value. There is a

strong negative trend in South Korea (-19 percent), but even more so in Japan, which closed the first quarter at -8percent, and this is even more worrying seeing that Tokyo is one of the top 10 Italian destinations (in seventh place). If this is just a taste of Covid. It is legitimate to expect figures of this nature in other countries, too, starting with the second quarter (April-June), when we will see the real impact of the pandemic on trade and the effects of the different lockdowns decided at different times in various countries. In the meantime - and this is another factor to bear in mind when putting the figures in some sort of order-, the first quarter in the USA closed in the negative for still wines (-3 percent), but the balance could have been worse if it hadn't been for measures taken in January, when operators increased stockpiles in the warehouse for fear of supplementary duties also being placed on

Italian wines. The fact that the number one market for value took such extraordinary measures obviously impacts on the performance of all bottled, still wine exports in January, with a +17 percent in value signalling a considerable increase in purchases of wines of a certain calibre. In fact, going back to the USA, we find +20 percent for Tuscan DOP reds, +8 percent for similar Piedmontese wines, +16 percent for Veneto ones, with increases in average price of +30 percent, +11 percent and +4 percent respectively. The balance in volume for this quarter remains negative, and highlights a surge at the start of the year that focussed on targeted purchases of high-level products. Another incisive factor with an anomalous affect concerns bulk wine. Just in the month of March, the market registered a huge rise in volume (+23 percent), generated just by the German market. When the pandemic broke out

BOTTLED BY CATEGORY

	Litres		Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Slightly sparkling (frizzanti)	40.395.135	9,3	96.441.593	6,4	2,39	-2,6
Dop (Doc-Docg)	138.209.020	2,8	621.098.326	8,3	4,49	5,3
Igp/Igt	81.037.619	1,6	276.561.997	6,1	3,41	4,5
Varietals	7.255.705	-15,8	11.736.985	-15,1	1,62	0,9
Common wines	18.367.207	-2,1	35.986.986	1,7	1,96	3,8
Still wines total	244.869.551	1,4	945.384.294	7,1	3,86	5,6
Sweet and fortified	1.554.536	5,1	13.078.394	-2,7	8,41	-7,4
Riexport	1.596.005	-22,2	9.653.612	-50,3	6,05	-36,2
Total	288.415.227	2,3	1.064.557.893	5,8	3,69	3,4

BOTTLED STILL WINES

	Litres		Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
USA	51.580.178	-2,8	263.967.397	9,6	5,12	12,8
Germany	58.864.222	9,2	177.349.995	10,8	3,01	1,5
UK	28.850.741	-15,3	72.456.379	-12,9	2,51	2,8
Canada	14.378.681	5,3	68.055.742	12,0	4,73	6,3
Switzerland	9.617.528	9,0	62.486.829	6,4	6,50	-2,3
Netherlands	9.942.227	22,0	34.048.560	25,5	3,42	2,9
Denmark	7.221.416	19,4	29.899.615	19,4	4,14	0,0
Sweden	5.844.304	15,9	26.329.010	19,8	4,51	3,3
Japan	7.137.831	-8,2	26.243.417	-8,9	3,68	-0,9
France	6.640.642	-9,8	19.698.705	3,4	2,97	14,7
Belgium	6.338.393	23,7	19.650.619	22,6	3,10	-0,9
Norway	3.114.452	19,5	15.130.890	14,7	4,86	-4,0
China	3.316.756	-42,7	12.637.643	-38,9	3,81	6,6
Russia	4.193.368	1,2	11.464.642	8,9	2,73	7,7
Austria	3.365.959	-2,7	10.339.011	-0,9	3,07	1,9
Poland	2.937.650	15,7	8.075.506	13,0	2,75	-2,3
Finland	1.728.591	23,4	7.197.065	20,6	4,16	-2,3
South Korea	1.046.750	-9,9	6.685.736	1,8	6,39	12,9
Ireland	1.579.834	-6,4	4.119.855	-9,7	2,61	-3,4
Czech R.	1.371.520	6,1	4.013.994	15,4	2,93	8,8
Brazil	1.243.534	14,2	3.716.594	-5,6	2,99	-17,4
Spain	578.607	4,0	3.132.626	24,1	5,41	19,4
Hong Kong	290.966	-37,5	2.896.578	-27,9	9,96	15,4
Mexico	671.809	15,8	2.087.539	29,6	3,11	11,9
Others	13.013.592	10,9	53.700.347	14,5	4,13	3,3
Total	244.869.551	1,4	945.384.294	7,1	3,86	5,6



SPARKLING BY CATEGORY

	Litres		Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Champagne (riexport)	326.547	11,4	6.731.068	-18,1	20,61	-26,5
Cava (riexport)	133.733	330,4	461.385	200,5	3,45	-30,2
Prosecco	60.048.055	12,0	228.120.858	6,0	3,80	-5,3
Asti	6.323.251	21,6	22.819.797	11,8	3,61	-8,1
Dop	4.373.300	-38,8	23.241.080	-30,2	5,31	14,1
Igp	1.996.196	42,3	6.148.974	31,5	3,08	-7,6
Varietals	2.696.115	2,9	7.987.416	-7,5	2,96	-10,1
Common sparkling	20.386.475	95,0	35.191.070	12,6	1,73	-42,2
Total	96.283.672	19,2	330.701.648	2,8	3,43	-13,8

in Italy, bottlers rushed to collect everything they could for fear of shortly finding tankers blocked at the Brenner Pass. During the quarter, German imports of bulk wine showed leaps of 35 percent, with spikes of 40 percent in value for common reds, combined with huge purchases from France (+20 percent) and Northern Europe, all led to growth of over 1000%. Unlike white wines stuck on last year's price lists, common reds saw prices surge by an average of 30 percent, at 71 cents per litre. This is another clamorous anomaly that only stockpiling dictated by urgent situations can explain.

**The General Discussion**  
After dotting the i's and crossing the t's, we can now turn to the discussion of general data, trying to understand whether spot events that sullied performance are destined to last and whether the system is aware of the fact that it needs to move faster this year, seeing that one of the legs it leans on (the domestic market) has been crippled for three months and is on the long road to recovery. General performance shows that in the three-month total, volume progressed by 6 percent, at 5.1 million hectolitres, while value stands at +5 percent, at 1.5 billion euros. We are starting to sell the 2019 vintage, which wasn't actually as low as implied by the post-harvest sentiment: official production statements talk of 47.5 million hectolitres, and it's true there is a 13 percent fall compared to the huge 2018 vintage. However, if we take a look at the last ten years, the 2019 vintage is in sixth place in terms of volume, half a million hectolitres below the ten-year average of 48 million. So, we are talking about a normal vintage, which explains why it was difficult for producers to impose general increases on their price lists, as they were tempted to do in November. Apart from Germany, bulk wine has maintained the same prices as 2019. Therefore, there is no lack of product to sell, and Cantina Italia data confirms this. At the start of June, the system gave

the figure of 48 million hectolitres, which means that, taking statements back a month, this was the situation in May, in addition to a clear slowing down of average requirements, which fell from 3.3 million in March and April to 2.7 million in May, when the effects of lockdown began to take their toll on HO-RECA. This does not exclude that, without any further deterioration, at this rate the wine year could end on 31<sup>st</sup> July with a balance of 41.8 million hectolitres, 3 more than 2019.

**The Pace Is Too Slow**  
If this is just the beginning, reading +1 percent on the still wine volume column gives rise to doubts that the sector is moving too slowly. On the other hand, the flourishing sparkling wine segment is showing more visible cracks to the naked eye. Performance in volume at +19 percent (just under 1 million hectolitres) should be compared with the very meagre +3 percent in value, destroyed by a 14 percent fall in average prices. If Prosecco is at +12 percent, it is thanks to the USA (+13 percent), Germany (+25 percent) and work done on the secondary markets (France, Canada,

Northern Europe), while London has gone backwards by 6 percent, which should speed up the current partial liberation from this market. General sparkling wines are growing disproportionately, all from the 2018 vintage and needing to be disposed of, and have been diverted mainly to the German market, which has seen purchases increase tenfold compared to March 2019. Another trend to bear in mind is the performance of white designation wines from the Triveneto area, including Pinot Grigio, Delle Venezie and company: Veneto wines fare better in the UK (+9 percent compared to -7 percent for similar wines from Trentino or Friuli), while on the US market the growth trend of Trentino and Friuli wines is four times higher and volumes have almost levelled out. 73,000 hectolitres compared to 92,000, with values that smile upon Trento and Friuli wines, especially for growth performance: 34 million euros (+42 percent) compared to 27 of wines from the Veneto (+5 percent). Performance of Veneto wines in Germany is declining (-3 percent in volume, accompanied by -2 percent in value).



	Litres		Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Germany	68.672.969	35,1	37.615.090	34,9	0,55	-0,1
Switzerland	5.369.562	-10,5	7.362.000	-25,2	1,37	-16,4
Sweden	4.671.958	32,2	5.097.385	14,5	1,09	-13,4
France	6.306.259	-51,3	4.000.865	-42,1	0,63	18,9
USA	1.022.541	20,6	3.091.082	64,4	3,02	36,4
UK	3.047.212	-21,7	2.708.208	-24,8	0,89	-4,0
Austria	4.174.396	-9,2	2.576.453	-6,9	0,62	2,5
Norway	1.080.553	68,1	2.319.813	60,3	2,15	-4,6
Denmark	1.373.030	-30,5	1.769.621	-25,4	1,29	7,3
Czech R.	3.459.272	19,4	1.604.027	20,8	0,46	1,2
Spain	983.545	-50,7	1.352.775	12,3	1,38	127,9
Canada	1.458.274	21,2	1.302.289	24,7	0,89	2,9
Netherlands	617.298	18,3	1.065.747	73,3	1,73	46,5
Others	8.610.870	-37,3	7.550.453	-16,2	0,88	33,6
Totale	110.847.739	4,9	79.415.808	6,8	0,72	1,8

SPARKLING

	Litres		Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
USA	24.790.735	17,4	100.444.950	14,0	4,05	-2,9
UK	19.408.876	-14,6	61.504.790	-22,8	3,17	-9,6
Germany	14.844.336	168,6	24.990.176	19,3	1,68	-55,6
France	4.215.732	25,9	14.421.078	5,2	3,42	-16,4
Switzerland	2.478.662	6,1	12.111.086	1,1	4,89	-4,7
Sweden	2.805.533	32,7	10.910.426	28,2	3,89	-3,4
Canada	1.972.331	33,8	9.672.482	35,3	4,90	1,1
Belgium	2.778.809	30,9	8.975.016	14,4	3,23	-12,6
Japan	1.887.439	5,7	8.672.229	-3,0	4,59	-8,2
Russia	2.694.826	12,7	8.426.796	12,5	3,13	-0,2
Austria	1.794.856	36,6	7.335.647	28,7	4,09	-5,8
Poland	1.466.356	61,3	5.313.021	41,4	3,62	-12,4
Netherlands	796.757	40,5	4.585.630	-4,5	5,76	-32,1
Norway	797.033	20,7	3.728.432	19,2	4,68	-1,3
Spain	1.627.766	53,4	3.367.617	-14,6	2,07	-44,4
Finland	700.562	42,0	2.959.258	47,3	4,22	3,7
China	775.377	-46,5	2.212.809	-52,5	2,85	-11,1
Ukraine	538.803	116,9	1.961.142	108,1	3,64	-4,1
Czech R.	526.262	40,6	1.930.450	24,1	3,67	-11,7
Denmark	481.950	19,7	1.901.302	19,6	3,95	-0,2
Brazil	388.249	55,8	1.007.718	22,9	2,60	-21,1
Hong Kong	147.465	-26,4	985.161	-17,9	6,68	11,6
Ireland	193.376	8,3	718.365	3,2	3,71	-4,7
South Korea	181.739	-25,4	694.345	-24,1	3,82	1,8
Others	7.989.842	6,8	31.871.722	0,2	3,99	-6,2
Total	96.283.672	19,2	330.701.648	2,8	3,43	-13,8

PROSECCO

	Litres		Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
USA	19.065.962	13,2	76.523.506	8,6	4,01	-4,1
UK	17.010.188	-5,5	54.426.949	-14,0	3,20	-9,0
Germany	2.925.734	25,4	12.585.543	24,6	4,30	-0,6
France	3.347.020	30,6	10.925.459	8,1	3,26	-17,3
Switzerland	1.819.522	9,8	8.259.407	5,3	4,54	-4,0
Canada	1.503.197	39,8	7.777.736	43,9	5,17	2,9
Sweden	1.899.296	25,7	7.492.418	21,9	3,94	-3,0
Belgium	1.781.184	27,6	6.007.513	15,5	3,37	-9,5
Austria	1.243.956	42,5	5.474.362	41,5	4,40	-0,7
Russia	1.066.148	94,9	4.089.142	76,8	3,84	-9,3
Poland	992.656	55,5	3.608.337	37,4	3,64	-11,7
Norway	636.088	21,9	2.815.134	19,5	4,43	-1,9
Finland	463.573	48,2	2.116.871	59,3	4,57	7,5
Netherlands	485.566	76,4	1.944.813	51,0	4,01	-14,4
Czech R.	340.627	27,5	1.283.516	13,7	3,77	-10,8
Japan	252.877	21,6	1.280.501	20,9	5,06	-0,6
Ukraine	270.906	145,5	1.167.077	136,6	4,31	-3,6
Spain	347.689	8,0	1.146.836	-15,7	3,30	-22,0
Ireland	174.492	33,0	652.204	27,1	3,74	-4,5
Denmark	146.878	7,5	479.219	-17,1	3,26	-22,8
Total	60.048.055	12,0	228.120.858	6,0	3,80	-5,3



BULK

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REPORT OF Q1 2020

# Caught Between Covid, Duties and Economic Stagnation

by CARLO FLAMINI

A mix of negative elements is at the base of declines registered in world trade in the first quarter of the year: and it isn't just down to Covid. Its effects were first seen in China, where the epidemic had already started in February, while other countries were only affected in March. Therefore the real impact of the virus will be seen in the second quarter. On the other hand, there are also "old" factors, inherited from 2019, whose effects can be explained today. First of all, American duties, which are affecting France and Spain, as well as the rise and fall of products linked to repeated Brexit announcements. Today, the sharp fall in products imported to London compared to March 2019 can be ascribed to stockpiling by operators during the period of their imminent exit from the EU. And then there are structural factors, tendentially flat for still wines and bulk, whose prices are still on hold despite the lower 2019 vintage. At the end, all of this produced -6 percent in volume of trade with the main countries monitored by our Observatory, just under 15 million hectolitres, for a value of 5.2 billion US Dollars (with a consequent reduction of 6 percent). Therefore, the whole recovery - around +4 percent -, generated from the second quarter of 2019, was cancelled out. Bulk and bottled wine follow the general average, falling in the first quarter of 2019 (already down by 2 percent), while for sparkling wines all the growth accumulated in 2019 was cancelled out, losing 5 percentage points compared to January-March of the previous year. As for value, standardising the parameters to US Dollars, the only segment that holds its own is sparkling wine (+5 percent), while the negative trend that accompanied bottled and bulk wine throughout the whole of last year, is continuing. In fact it's worsening. The price trend of bottled wines has been flat since the third quarter of 2019 (just above 5 USD per litre), while bulk has remained at the same prices as at the end of 2019, below 90 cents. The rebound expected from the meagre 2019 vintage hasn't arrived yet and, seeing the general situation predicted, it will probably be unlikely to occur in the measure and times producers had hoped.

## Bottled Wines

Let's begin by discussing the countries nearest to us. Italy got off to a positive start in Germany (particularly for value, +11 percent), especially when we compare performance with the total market (flat) and with the main competitors, France and Spain, who both suffered heavy losses. Volumes of orders for products from Italy

went up in February (+14 percent in value), a sign of contracts concluded by large groups for products with a higher added value. Incidentally, in March alone, Italian bulk wine saw a steep hike of 40 percent due to the first effects of lockdown put in place in the country.

In Switzerland, the situation reflects the German one. Small growth in volume for Italy, tumbles for France and Spain, with the market closing at -1 percent in volume and -16 percent in value. This factor was due, more than anything, to the strengthening of the Franc against the euro, which began at the end of 2019.

The situation in the UK is developing. The market closed at -13 percent in volume, with France and Italy down very low (over 20 percent for Italy). The same fate was met by Spanish, Argentine and South African wines, while the New Zealanders and Chileans appear to be immune for the time being, for various reasons. Australian wines are stable. The negative signs across the volume columns of European suppliers can be explained by the overstocking effect in March of last year, when London's exit from the EU was planned. In that period Italy and France registered +25 percent and the total market went above +12 percent.

The Russian market, on the other hand, has stabilized, thus interrupting the positive streak which began in 2017. The negative trend in the first quarter (-7 percent), however, barely touched Italy and France, but penalized Spain and particularly Georgia, Germany and Portugal.

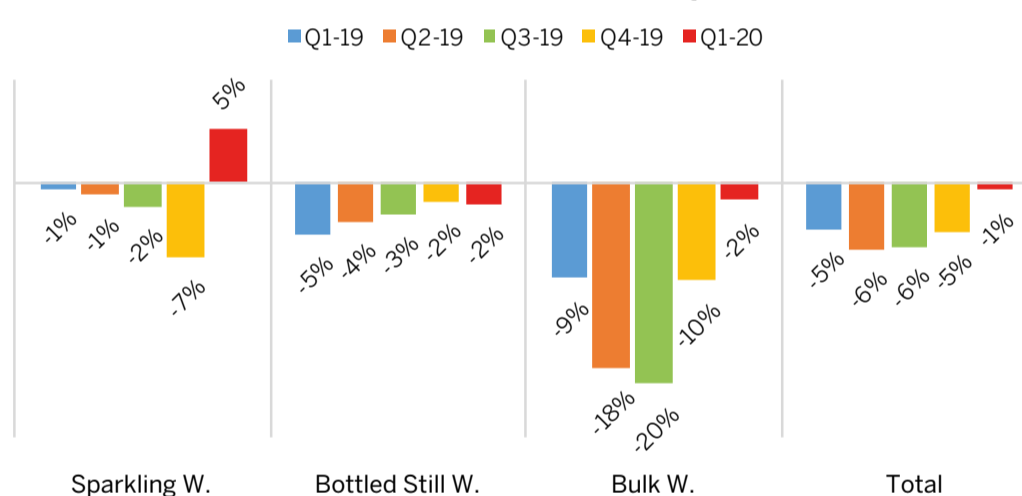
The year started well in France, where, faced with a general fall in the market (-15 percent), Italy closed at +20 percent, compared to -5 percent for the Portuguese leaders and -33 percent for Spain. Let's move to a different continent and turn to America. In the United States, an apparently stable situation was observed in March, with the total bottled wine market balance at zero and only -1 percent loss in value. Distinctions between countries are important, but for now the only clear separation is that of new duties rather than Covid. Italy stands at +2 percent, while duties impacted more on France, Spain and Germany, who closed in the negative, particularly Paris (-9 percent). New Zealand continues to grow and Australia is falling, while South American wines are making a strong comeback.

In Canada, the first quarter smiled once more upon Californian producers, while Italy and France took a downturn. For Italy, in particular, the trend is not one of the best, seeing that after four years we are back under the quarterly threshold of 140,000 hectolitres, added to the erosive trend in value. The heavy losses continue for Australian producers too, while the Span-

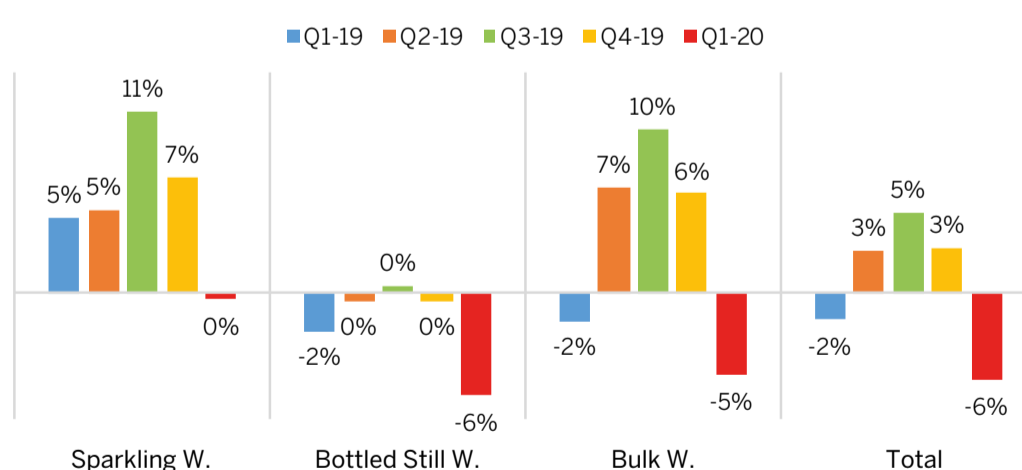
A difficult start to the year for all types of wine, with the general balance at -6 percent.

China brings down the world, while bulk can't pull itself away from the (wretched low) prices of 2019. Sparkling wine is slowing down too

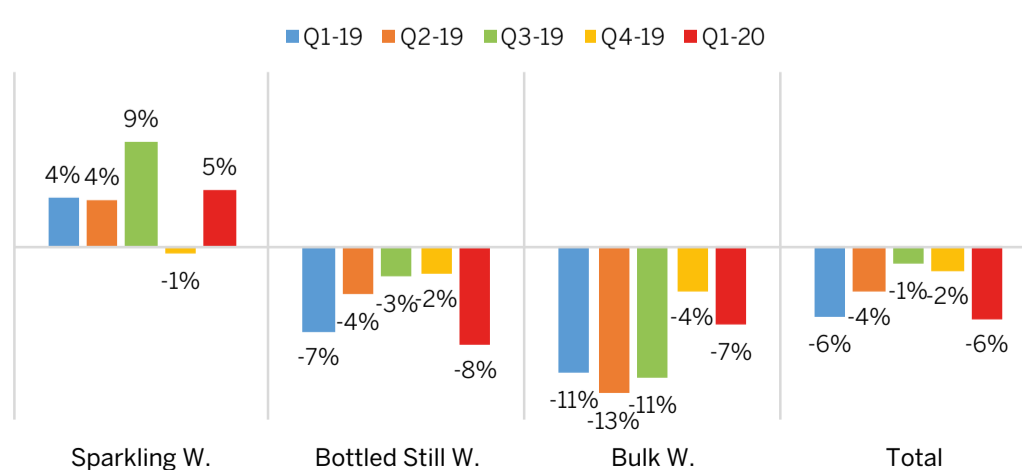
WORLD WINE TRADE: YEARLY PRICES, % CHANGE BY QUARTER



WORLD WINE TRADE: YEARLY VOLUME, % CHANGE BY QUARTER



WORLD WINE TRADE: YEARLY VALUE, % CHANGE BY QUARTER





ish, Chileans and New Zealanders are on the up. It was a good start to the year for the Brazilian market, but not for Italy, which lost 14 percent in volume, accompanied by -9 percent in value. Chile, Portugal, Argentina and Spain have all increased significantly, while only France (of the big producers) has followed Italy's fate.

Let's turn to Asia. The resounding fall of the Chinese market is the heaviest legacy from the first quarter, and Covid is one of the main culprits (which we will analyse on page 43). But, as we have underlined several times in our closing comments for 2019, the health crisis combines with a not particularly great economic moment for Beijing. Wine already saw a general decline of -3 percent in the last quarter of 2019, which only really strongly affected France and Chile, however. In the first quarter of 2020, Australia took a big downturn (-16 percent), and even Italy wasn't immune, eating into the entire increase

registered at the end of 2019 (from +13 percent to -13 percent), as well as Spain.

The negative sequence on the Hong Kong market has been enormous, with the total market falling by 27 percent in volume and 24 percent in value. Rather than Covid, there has been a real involution of the market, considering the 8 consecutive negative quarters, including the March one.

The Japanese situation is almost identical to the Chinese one, where Covid started to hit hard in March. Also here, apart from Chile, European countries saw all the benefits of free trade agreements vanish, which had boosted trade in 2019. Italy collapsed from +20 percent in October-December 2019 to -5 percent, and France and Spain respectively from +5 percent and +6 percent to -10 percent.

Bucking the trend, on the other hand is the South Korean market, where Italy outdid global performance (+18 percent compared to +3 percent) and all the main countries generally showed strong growth. The only exceptions are the top two ranked countries: Chile -7 percent and France -19 percent, combined with strong reductions in value, too.

**Sparkling Wines**

As mentioned at the start, of all the wine categories under examination, the situation has remained the best for sparkling wines, although the scenario is deteriorating slightly. The main markets are experiencing very different situations. Growth in the USA is balanced by the drastic fall in the UK and Japan, which is slight, but not small. Imports to Germany are increasing, while Switzerland closed 2019 on an even keel.

In closer detail, the usual Italian growth on the US market (+12 percent, though this time last year it was +20 percent), is combined with the imposing and exceptional growth of France: +59 percent in volume and a staggering +90 percent in value. It is exceptional because it is obviously based on stockpiling by importers in view of the adoption of new duties on Champagne by the American administration. This situation was then frozen and withdrawn, probably considering the problems that Trump found himself caught up in, at the time. The British situation is completely different. The whole market went down by 26 percent, but a lot of that decrease was also due to stockpiling last year in view of Brexit. In light of these factors, we can interpret the performance of the different countries: Italy at -9 percent, with Prosecco going down for the first time (-6 percent, compared to +53 percent in March 2019), France at -55 percent and Spain at -22 percent. All this data "pollution" from Brexit will probably continue throughout the year, when the real effects of the Covid epidemic will be seen, which is currently causing real sanitary and economic mayhem in the UK.

Germany seems to be doing well, but the distinctions here need to be examined too. The +16 percent is the result of huge imports of Spanish sparkling wine, which got lost along the way this time last year, and have returned to normal levels. Italy stands at -5 percent, but replicates last year's -11 percent motivated by bad weather during the Easter period, which compromised normal sales. France is stable, and reassembling the market scenario, at least for sparkling wines, it doesn't appear to be expanding. The effects of Covid throughout the year have to be taken into account, here, too. Then we come to Japan: the barometer indicates a bad spell (-8 percent), and the only one that appears to have an umbrella is Italy, which closes the balance at +8 percent, against -8 percent and -15 percent of France and Spain, respectively. However, we should reflect on Italy's performance in March, calculated at -8 percent for the first quarter, which should be compared to over +40 percent in subsequent quarters of 2019. This means Italy is falling, too. As for "minor" markets, Italy's performance is very positive in Canada, with +13 percent on March that enables our country to stay at the top of suppliers' rankings, taking advantage of a 7 percent decrease of their French rivals. In Russia, Italy overperformed by almost double (+16 percent, even more positive when compared to the meagre performance of France and Spain), while in France Prosecco's excellent performance brings the Italian balance (which would otherwise be negative) to +1 percent, in comparison with -11 percent for Cava. The situation in Switzerland is moderate, we are experiencing a positive streak (+3 percent) against a downturn for France (-9 percent) and Spain (-15 percent).

Sparkling w.

Bottled still w.

Bulk wines

	Thousand litres			Thousand \$			\$/litre		
	2019	2020	% change	2019	2020	% change	2019	2020	% change
USA	32.311	38.872	20,3	248.545	360.313	45,0	7,69	9,27	20,5
UK	28.863	21.450	-25,7	193.918	143.299	-26,1	6,72	6,68	-0,6
Japan	8.484	7.771	-8,4	143.690	136.044	-5,3	16,94	17,51	3,4
Germany	9.847	11.391	15,7	77.406	77.220	-0,2	7,86	6,78	-13,8
Switzerland	3.639	3.665	0,7	37.297	34.325	-8,0	10,25	9,37	-8,6
Russia	6.203	6.769	9,1	31.977	33.753	5,6	5,16	4,99	-3,3
Canada	3.128	3.240	3,6	28.165	27.814	-1,2	9,00	8,59	-4,7
France	6.425	6.282	-2,2	23.543	22.689	-3,6	3,66	3,61	-1,4
China	2.845	2.247	-21,0	20.207	15.191	-24,8	7,10	6,76	-4,8
Hong Kong	524	413	-21,2	17.459	11.837	-32,2	33,32	28,66	-14,0
South Korea	1.395	1.093	-21,7	11.676	9.968	-14,6	8,37	9,12	9,0
Brazil	1.147	1.223	6,6	5.020	5.413	7,8	4,38	4,43	1,1
Total	104.811	104.415	-0,4	838.903	877.866	4,6	8,00	8,41	5,0

	Thousand litres			Thousand \$			\$/litre		
	2019	2020	% change	2019	2020	% change	2019	2020	% change
USA	178.678	179.069	0,2	1.085.000	1.072.953	-1,1	6,07	5,99	-1,3
UK	146.831	128.293	-12,6	607.509	509.670	-16,1	4,14	3,97	-4,0
China	108.425	85.695	-21,0	547.299	431.519	-21,2	5,05	5,04	-0,2
Germany	117.933	114.218	-3,1	407.187	396.821	-2,5	3,45	3,47	0,6
Canada	62.104	62.299	0,3	362.230	363.438	0,3	5,83	5,83	0,0
Japan	37.480	38.026	1,5	212.025	211.246	-0,4	5,66	5,56	-1,8
Hong Kong	10.293	7.538	-26,8	268.934	207.329	-22,9	26,13	27,50	5,3
Switzerland	23.380	23.122	-1,1	231.658	201.722	-12,9	9,91	8,72	-12,0
Russia	56.404	52.481	-7,0	172.954	165.517	-4,3	3,07	3,15	2,9
France	28.198	24.086	-14,6	119.393	100.102	-16,2	4,23	4,16	-1,8
Brazil	19.722	22.772	15,5	62.931	69.465	10,4	3,19	3,05	-4,4
South Korea	8.097	8.327	2,8	50.374	50.959	1,2	6,22	6,12	-1,6
Totale	797.545	745.927	-6,5	4.127.494	3.780.741	-8,4	5,18	5,07	-2,1

	Thousand litres			Thousand \$			\$/litro		
	2019	2020	% change	2019	2020	% change	2019	2020	% change
UK	127.261	116.338	-8,6	164.444	156.871	-4,6	1,29	1,35	4,4
Germany	198.455	187.802	-5,4	139.861	131.317	-6,1	0,70	0,70	-0,8
USA	92.965	98.642	6,1	85.326	96.088	12,6	0,92	0,97	6,1
France	139.985	132.762	-5,2	77.056	72.689	-5,7	0,55	0,55	-0,5
China	37.322	35.252	-5,5	47.307	33.270	-29,7	1,27	0,94	-25,5
Canada	33.131	31.576	-4,7	26.113	20.838	-20,2	0,79	0,66	-16,3
Switzerland	15.120	14.600	-3,4	23.781	19.764	-16,9	1,57	1,35	-13,9
Japan	12.002	11.631	-3,1	14.487	12.565	-13,3	1,21	1,08	-10,5
Russia	21.908	14.041	-35,9	13.258	8.209	-38,1	0,61	0,58	-3,4
Total	678.148	642.644	-5,2	591.633	551.611	-6,8	0,87	0,86	-1,6

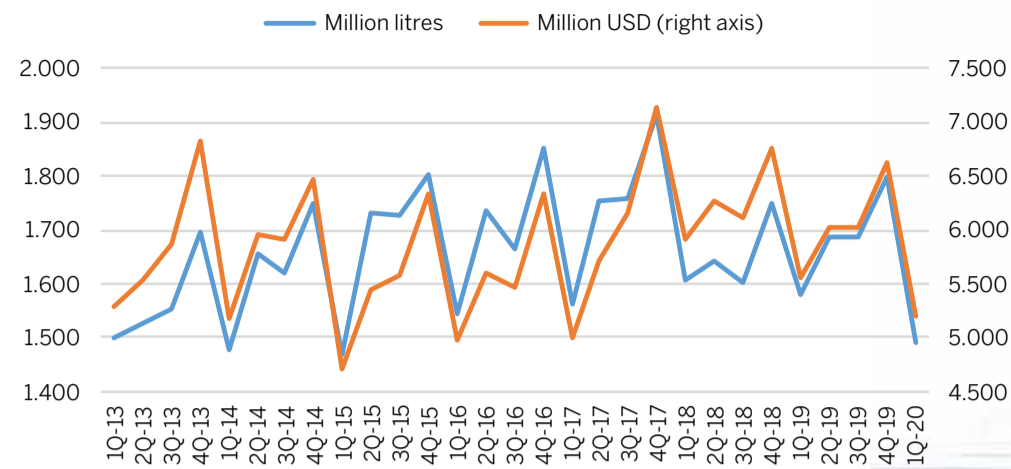
Aggregate total	1.580.504	1.492.986	-5,5	5.558.031	5.210.217	-6,3	3,52	3,49	-0,8
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Note: The total sums up trades in the UK, Germany, Switzerland, Russia, France, the USA, Canada, Brazil, China, Hong Kong, Japan and South Korea

Note: change % calculated on USD. For single currency details, see figures inside



WORLD WINE TRADE: QUARTERLY PERFORMANCES



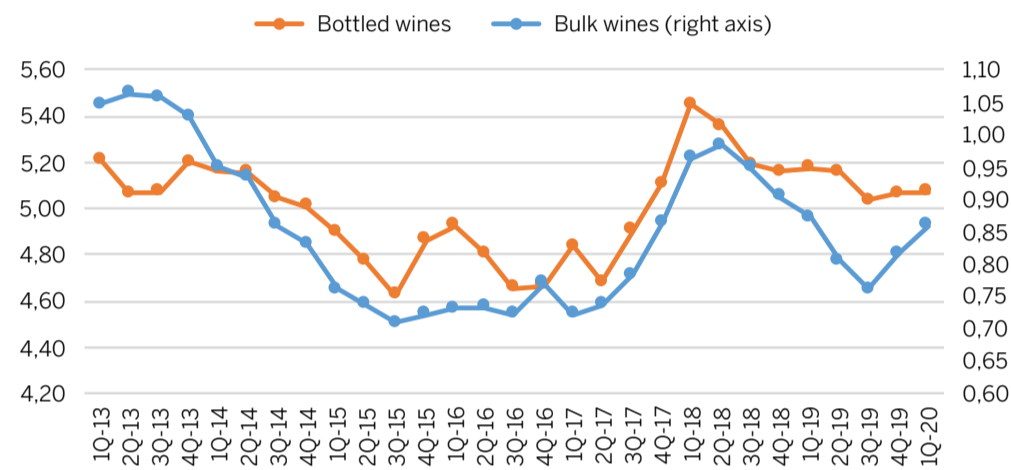
**Bulk**  
Imports on the main markets are decreasing, which is a sign that the market has been playing a waiting game for the first part of the year: UK -9 percent, Germany -5 percent, France -2 percent, with the only exception of the United States, up 6 percent on an annual basis. Prices are generally

static and/or falling, with Germany and France stable at last year's (very low) prices, when they were based on the 2018 vintage. The market is not absorbing (and doesn't want to absorb) attempted increases by producers, and this can be seen clearly on the German market, where Italian wine stands at -7 percent, though bought for

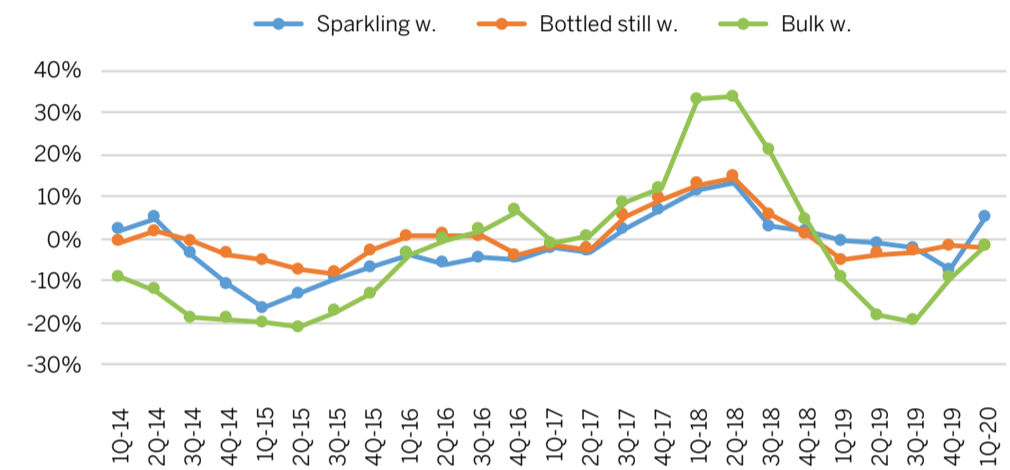
about 10 cents more than Spanish wine: a better quality, cheaper wine rather than a more competitive but lower quality one. In France, on the other hand, where the market is in the hands of Spain, Castilla-La Mancha wines confirm their 2019 price of 40 cents per litre, while Italy doesn't budge from 58 cents from the previous year.



AVERAGE PRICES FOR BOTTLED AND BULK WINES (\$/LITRE)



AVERAGE PRICES - YEARLY % CHANGE BY QUARTER



Continued on Page 41 ➡

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Continued from Page 39

BOTTLED STILL WINES



GERMANY

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Italy	50.799	1,1	165.441	10,5	3,26	9,2
France	23.413	-4,3	79.295	-9,5	3,39	-5,4
Spain	16.451	-15,6	44.475	-8,9	2,70	8,0
Austria	5.987	24,1	13.430	10,7	2,24	-10,8
Usa	2.555	5,0	11.438	3,2	4,48	-1,7
South Africa	3.512	-9,1	10.437	-7,1	2,97	2,2
Portugal	2.751	-3,4	8.865	2,2	3,22	5,9
Chile	1.813	-4,8	6.358	3,1	3,51	8,3
Australia	1.283	-43,2	4.905	-33,0	3,82	17,9
Greece	1.866	-5,7	3.939	-9,7	2,11	-4,3
Argentina	673	-7,3	2.827	-2,0	4,20	5,7
New Zealand	354	-33,1	2.092	-17,9	5,91	22,8
Hungary	1.038	20,0	1.617	16,6	1,56	-2,9
Moldova	158	-24,1	316	-18,8	2,00	7,0
Switzerland	32	-79,6	275	-58,2	8,54	104,4
Croatia	80	14,2	256	28,6	3,19	12,6
Turkey	64	-41,8	215	-45,2	3,38	-5,7
Bulgaria	18	-68,1	47	-77,3	2,66	-28,8
Others	1.370	53,4	3.847	43,4	2,81	-6,5
Total	114.218	-3,1	360.075	0,4	3,15	3,7



FRANCE

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Portugal	6.894	-5,0	20.863	-6,0	3,03	-1,0
Italy	5.065	20,2	15.956	2,8	3,15	-14,5
USA	120	-18,6	12.312	-11,0	102,60	9,3
Spain	6.926	-33,0	9.638	-36,9	1,39	-5,8
UK	352	-55,4	6.765	-23,4	19,24	71,7
Germany	1.792	-11,3	5.383	-3,6	3,00	8,6
Belgium	209	-24,5	2.845	-24,5	13,61	0,1
Switzerland	28	16,3	2.440	-14,9	87,76	-26,9
Argentina	377	6,4	1.973	9,6	5,23	3,0
New Zealand	218	-4,8	1.694	-3,8	7,76	1,1
Chile	508	-12,0	1.540	-38,5	3,03	-30,1
South Africa	141	-33,6	483	-45,9	3,42	-18,5
Australia	40	-40,5	264	-27,2	6,62	22,4
Others	1.417	-16,1	8.677	-12,8	6,13	4,0
Total	24.086	-14,6	90.833	-13,6	3,77	1,1



RUSSIA

	Litres		\$		\$/litre	
	2020	% change	2020	% change	2020	% change
Italy	10.352.928	-1,8	36.774.216	-5,6	3,55	-3,9
France	6.584.074	-1,9	28.274.977	3,4	4,29	5,4
Spain	9.953.528	-6,4	25.143.559	0,4	2,53	7,2
Georgia	7.327.984	-27,0	23.195.437	-26,6	3,17	0,6
Chile	3.459.496	7,4	9.338.757	4,6	2,70	-2,6
Abkhazia	3.429.240	-3,3	8.218.570	0,3	2,40	3,8
New Zealand	1.022.851	69,0	5.561.688	59,3	5,44	-5,7
Portugal	1.786.503	-4,8	5.355.859	-3,6	3,00	1,3
South Africa	1.508.536	24,6	3.873.720	12,6	2,57	-9,6
Germany	1.205.755	-20,1	3.276.180	-9,5	2,72	13,2
Argentina	958.867	49,0	3.128.346	21,5	3,26	-18,4
Australia	624.838	14,9	2.358.181	12,4	3,77	-2,2
USA	436.796	62,9	2.301.653	84,8	5,27	13,4
Serbia	1.206.480	8,1	2.054.221	18,0	1,70	9,1
Moldova	686.012	-46,3	1.074.460	-49,5	1,57	-5,9
Armenia	199.991	-61,6	672.260	-52,8	3,36	22,7
Bulgaria	305.774	-33,5	441.186	-39,5	1,44	-9,0
Azerbaijan	164.581	-55,5	380.446	-50,0	2,31	12,2
Others	1.266.303	-3,5	4.093.593	0,0	3,23	3,6
Total	52.480.535	-7,0	165.517.309	-4,3	3,15	2,9



UNITED KINGDOM

	Thousand litres		Thousand £		£/litre	
	2020	% change	2020	% change	2020	% change
France	24.817	-16,6	114.607	-27,7	4,62	-13,4
Italy	27.929	-20,9	59.557	-20,8	2,13	0,1
New Zealand	8.686	4,3	38.597	9,8	4,44	5,3
Spain	17.071	-13,7	36.544	-13,8	2,14	-0,1
Chile	12.927	11,1	35.255	11,9	2,73	0,7
Germany	11.280	-0,1	23.882	-0,7	2,12	-0,6
Australia	7.128	1,9	19.200	6,5	2,69	4,5
Argentina	6.423	-14,1	18.044	-16,0	2,81	-2,2
South Africa	4.501	-39,4	11.072	-33,2	2,46	10,1
USA	940	-29,1	11.014	3,6	11,72	46,2
Portugal	2.390	-19,6	8.075	-25,6	3,38	-7,6
Others	4.201	-7,7	22.157	0,3	5,27	8,7
Total	128.293	-12,6	398.004	-14,7	3,10	-2,4



UNITED STATES

	Thousand litres		Thousand \$		\$/litre	
	2020	% change	2020	% change	2020	% change
Italy	63.836	1,6	407.444	15,6	6,38	13,8
France	31.173	-8,7	252.943	-21,3	8,11	-13,8
New Zealand	12.937	3,7	95.216	4,5	7,36	0,7
Spain	11.840	-1,8	69.739	3,1	5,89	5,0
Argentina	12.442	9,0	63.739	2,0	5,12	-6,4
Australia	18.682	-8,4	62.954	-8,6	3,37	-0,3
Chile	11.196	10,1	37.345	8,0	3,34	-1,9
Portugal	5.397	16,2	27.948	16,4	5,18	0,1
Germany	3.815	-4,8	13.772	-30,6	3,61	-27,1
South Africa	2.175	16,3	11.000	10,9	5,06	-4,7
Others	5.577	19,5	30.853	-4,9	5,53	-20,4
Total	179.069	0,2	1.072.953	-1,1	5,99	-1,3



CANADA

	Litres		Can. \$		Can. \$/litre	
	2020	% change	2020	% change	2020	% change
USA	11.080.055	7,5	108.719.425	6,4	9,81	-1,0
Italy	13.824.406	-3,8	104.040.491	-1,1	7,53	2,9
France	11.005.404	-1,2	99.443.811	1,5	9,04	2,8
Australia	5.273.193	-12,1	36.246.142	-15,6	6,87	-3,9
Spain	4.820.558	9,6	33.280.385	8,9	6,90	-0,7
Chile	5.116.810	14,6	25.667.531	8,7	5,02	-5,1
New Zealand	2.570.137	15,3	25.090.090	14,9	9,76	-0,3
Argentina	3.032.702	0,2	20.889.781	4,4	6,89	4,3
Portugal	2.748.523	-2,3	16.551.202	-2,5	6,02	-0,2
South Africa	1.293.492	-21,4	7.258.121	-17,9	5,61	4,5
Germany	530.432	-32,0	3.223.729	-28,8	6,08	4,7
Others	1.003.389	9,7	7.891.787	12,0	7,87	2,1
Total	62.299.101	0,3	488.302.495	1,4	7,84	1,1



SWITZERLAND

	Litres		CHF		Chf/litre	
	2020	% change	2020	% change	2020	% change
Italy	10.025.348	2,2	74.362.755	-3,9	7,42	-6,0
France	3.740.368	-14,6	57.686.359	-32,5	15,42	-21,0
Spain	3.764.432	-6,9	27.378.061	-10,7	7,27	-4,1
Portugal	1.961.230	13,1	8.270.920	0,7	4,22	-11,0
Germany	978.216	1,9	6.715.106	-15,7	6,86	-17,3
USA	610.756	13,4	5.061.477	-0,2	8,29	-12,0
Austria	636.700	38,2	4.444.660	11,9	6,98	-19,0
Argentina	541.726	0,3	3.287.923	0,2	6,07	-0,1
Chile	246.295	-16,4	1.544.916	-21,8	6,27	-6,4
South Africa	148.197	15,9	937.075	-17,0	6,32	-28,4
Australia	160.428	17,8	681.782	-45,0	4,25	-53,3
New Zealand	27.698	-37,8	253.030	-33,7	9,14	6,6
Others	280.207	-9,6	4.623.053	9,0	16,50	20,6
Total	23.121.601	-1,1	195.247.117	-15,5	8,44	-14,5



BRAZIL

	Litres		\$		\$/litre	
	2020	% change	2020	% change	2020	% change
Chile	9.746.313	21,0	26.563.575	12,6	2,73	-6,9
Portugal	4.624.702	38,5	13.928.705	34,7	3,01	-2,8
Argentina	3.005.285	12,1	10.424.323	7,0	3,47	-4,6
Italy	2.091.867	-14,5	6.965.157	-8,8	3,33	6,7
Spain	1.440.357	31,1	4.424.129	26,9	3,07	-3,2
France	1.093.179	-10,3	4.330.967	-12,0	3,96	-1,9
Uruguay	436.745	26,4	1.448.278	40,6	3,32	11,2
Usa	75.806	43,1	365.655	-4,6	4,82	-33,3
South Africa	97.010	-52,7	329.879	-47,1	3,40	11,7
Germany	53.810	374,6	159.109	203,7	2,96	-36,0
Australia	31.540	-77,4	134.580	-69,2	4,27	36,0
New Zealand	12.222	-78,0	62.779	-81,5	5,14	-16,2
Others	63.276	-11,8	327.978	-3,7	5,18	9,2
Total	22.772.112	15,5	69.465.114	10,4	3,05	-4,4

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BOTTLED WINES

CHINA



	Litres		\$		\$/litre	
	2020	% change	2020	% change	2020	% change
Australia	22.443.761	-15,6	170.678.694	-1,8	7,60	16,4
France	22.787.935	-30,1	107.417.543	-40,9	4,71	-15,4
Chile	14.126.311	-20,3	54.587.827	-19,4	3,86	1,1
Italy	6.509.399	-12,7	30.496.210	-14,8	4,68	-2,4
Spain	10.564.448	-9,5	29.297.599	-13,3	2,77	-4,2
Portugal	1.500.572	-30,0	5.460.889	-25,3	3,64	6,8
Argentina	1.093.169	-4,6	5.053.463	-12,2	4,62	-8,0
USA	985.135	-34,7	4.536.320	-46,5	4,60	-18,1
Germany	657.618	8,8	3.827.709	-2,1	5,82	-10,0
New Zealand	334.917	-34,1	3.805.528	-19,9	11,36	21,7
South Africa	1.037.965	-44,3	3.516.691	-51,0	3,39	-12,0
Georgia	962.397	-34,2	3.510.217	-36,3	3,65	-3,3
Moldova	1.244.600	8,1	2.759.120	3,3	2,22	-4,4
Others	1.446.638	-26,2	6.571.333	-26,2	4,54	0,1
Total	85.694.865	-21,0	431.519.143	-21,2	5,04	-0,2

HONG KONG

	Thousand litres		Thousand HKD		HKD/litre	
	2020	% change	2020	% change	2020	% change
France	2.041	-14,8	778.182	7,6	381,33	26,3
UK	282	-33,8	235.093	-36,4	832,99	-4,1
USA	880	-41,9	219.912	10,6	249,78	90,5
Australia	1.837	-7,5	108.601	-24,1	59,11	-18,0
Italy	451	-27,3	38.295	-14,6	84,93	17,4
Switzerland	6	-97,6	24.632	-66,7	4143,31	1283,0
Singapore	329	81,7	20.924	-20,3	63,68	-56,1
Germany	74	-46,3	19.819	-47,4	268,48	-2,0
Chile	463	-50,3	18.809	-44,5	40,64	11,6
Spain	384	-39,6	18.772	-44,4	48,84	-7,9
China	94	-70,2	15.885	-94,4	169,87	-81,3
New Zealand	171	-30,0	12.199	-25,7	71,26	6,2
Argentina	47	-45,7	1.782	-38,0	38,12	14,0
South Africa	32	-59,2	1.657	-63,9	52,13	-11,5
Portugal	15	-33,7	1.177	-49,4	76,07	-23,7
Others	432	-8,2	95.393	-16,5	220,90	-9,1
Total	7.538	-26,8	1.611.132	-23,6	213,75	4,3

SOUTH KOREA

	Thousand litres		Thousand \$		\$/litre	
	2020	% change	2020	% change	2020	% change
Chile	2.773	-7,0	11.548	-12,1	4,16	-5,5
France	962	-18,7	10.543	-11,9	10,96	8,3
USA	877	25,1	10.215	22,3	11,64	-2,2
Italy	1.087	17,7	7.119	8,8	6,55	-7,5
Spain	1.370	17,5	4.087	13,8	2,98	-3,2
Australia	687	21,9	3.480	18,0	5,06	-3,2
Argentina	244	10,5	1.205	7,8	4,95	-2,5
New Zealand	120	26,6	1.014	18,7	8,48	-6,2
Portugal	68	28,9	508	16,5	7,50	-9,6
Germany	51	-37,2	332	-26,7	6,48	16,7
South Africa	35	-1,5	196	-9,7	5,61	-8,3
Others	54	-43,5	712	-5,4	13,30	67,2
Total	8.327	2,8	50.959	1,2	6,12	-1,6

JAPAN

	Thousand litres		Thousand Yen		Yen/litre	
	2020	% change	2020	% change	2020	% change
France	8.447	-9,5	8.356.253	-13,1	989,20	-4,0
Chile	13.007	26,2	4.320.036	28,9	332,14	2,1
Italy	7.209	-4,7	3.660.552	-6,2	507,78	-1,6
USA	1.397	-26,2	3.097.709	5,2	2.218,10	42,5
Spain	4.112	-10,3	1.338.796	-8,4	325,55	2,2
Australia	1.520	-0,9	687.048	7,2	451,93	8,2
Germany	542	-1,6	312.363	-7,1	576,52	-5,6
New Zealand	288	13,2	301.359	27,9	1.045,41	13,1
South Africa	387	44,8	229.451	56,6	592,45	8,1
Portugal	379	2,5	188.486	7,6	496,72	5,0
Argentina	292	-25,6	182.711	-21,2	626,49	6,0
Others	445	4,1	344.945	9,6	774,74	5,3
Total	38.026	1,5	23.019.709	-1,4	605,36	-2,9



SPARKLING

GERMANY

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
France	4.207	0,1	46.277	-0,4	11,00	-0,5
Italy	3.865	-4,9	14.745	-12,1	3,81	-7,5
Spain	3.079	118,8	7.656	94,1	2,49	-11,3
Austria	60	-0,8	521	32,9	8,65	34,0
Ukraine	95	260,7	295	239,1	3,12	-6,0
South Africa	18	-30,8	147	-5,8	7,99	36,2
Others	66	14,4	428	30,9	6,49	14,4
Total	11.391	15,7	70.069	2,8	6,15	-11,1

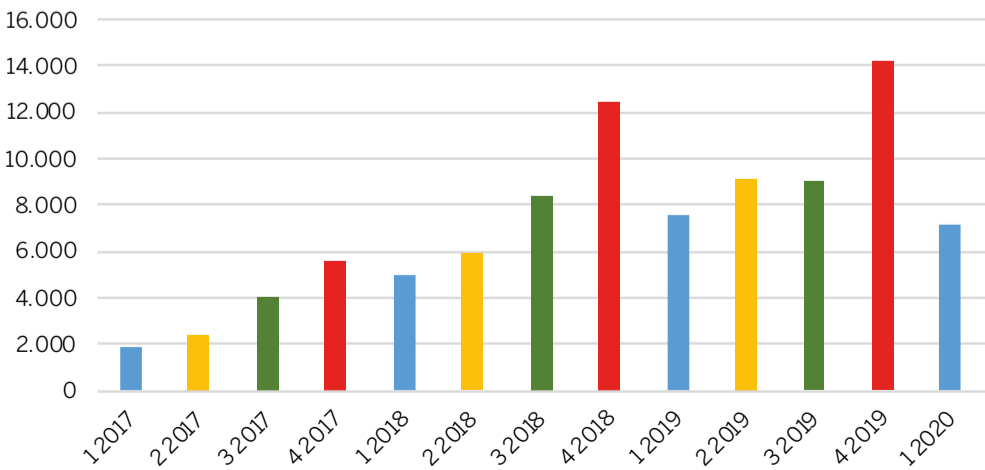
FRANCE

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% change	2020	% change	2020	% change
Italy	3.365	1,1	11.470	13,6	3,41	12,3
Spain	1.841	-10,5	4.021	-20,4	2,18	-11,0
Germany	780	2,2	1.755	52,0	2,25	48,7
Others	297	7,1	3.341	-24,6	11,27	-29,5
Total	6.282	-2,2	20.588	-0,7	3,28	1,6

UNITED KINGDOM

	Thousand litres		Thousand £		£/litre	
	2020	% change	2020	% change	2020	% change
France	3.814	-55,4	60.787	-28,5	15,94	60,1
Italy	15.794	-9,4	43.924	-18,8	2,78	-10,4
Spain	1.135	-22,3	2.829	-19,9	2,49	3,2
Germany	219	-59,1	1.044	-27,1	4,78	78,5
Australia	115	-33,0	382	-28,5	3,33	6,6
USA	61	-11,8	324	15,7	5,27	31,1
New Zealand	53	-4,6	285	2,5	5,39	7,5
South Africa	43	-74,8	227	-66,7	5,32	32,1
Others	216	-48,4	2.100	-30,1	9,74	35,4
Total	21.450	-25,7	111.903	-24,9	5,22	1,1

QUARTERLY PROSECCO IMPORT INTO THE UK (.000 LITRE)





SPARKLING



SWITZERLAND

	Litres		CHF		CHF/litre	
	2020	% change	2020	% change	2020	% change
France	703.133	-9,0	18.247.343	-15,5	25,95	-7,1
Italy	2.382.482	2,9	12.344.889	-8,3	5,18	-10,9
Spain	309.585	-15,2	1.125.350	-23,1	3,64	-9,3
Germany	215.206	40,5	930.650	26,0	4,32	-10,4
Austria	20.344	140,4	192.119	15,1	9,44	-52,1
Others	34.722	48,8	383.286	-4,6	11,04	-35,9
Total	3.665.472	0,7	33.223.637	-12,2	9,06	-12,8



RUSSIA

	Litres		\$		\$/litre	
	2020	% change	2020	% change	2020	% change
Italy	4.600.920	16,3	18.925.658	15,3	4,11	-0,9
France	906.850	1,6	10.442.906	-5,0	11,52	-6,5
Spain	1.099.098	6,8	3.652.901	5,0	3,32	-1,7
Germany	33.325	119,9	159.379	121,6	4,78	0,8
Abkhazia	21.402	-85,0	43.533	-86,9	2,03	-12,9
Georgia	4.782	-89,9	24.218	-82,3	5,06	75,3
Moldova	9.864	-52,7	19.913	-64,3	2,02	-24,5
Others	93.120	-6,4	484.429	-2,4	5,20	4,3
Total	6.769.361	9,1	33.752.937	5,6	4,99	-3,3



CANADA

	Litres		Can. \$		Can. \$/litre	
	2020	% change	2020	% change	2020	% change
Italy	1.691.737	12,2	14.803.463	12,6	8,75	0,3
France	531.024	-1,4	14.473.119	-6,7	27,26	-5,4
Spain	451.732	-6,7	3.350.981	-5,2	7,42	1,5
USA	117.078	8,1	1.526.724	-10,7	13,04	-17,4
Germany	149.146	-29,5	1.024.515	-30,5	6,87	-1,5
Australia	130.529	7,5	842.989	6,7	6,46	-0,7
Hungary	79.851	26,7	462.323	42,5	5,79	12,5
Others	88.653	-5,5	886.274	-7,3	10,00	-1,8
Total	3.239.750	3,6	37.370.388	-0,2	11,53	-3,6



UNITED STATES

	Thousand litres		Thousand \$		\$/litre	
	2020	% change	2020	% change	2020	% change
France	10.463	59,1	219.582	87,6	20,99	17,9
Italy	22.382	11,7	114.624	9,0	5,12	-2,4
Spain	5.102	3,0	21.450	-2,6	4,20	-5,4
Germany	316	67,2	1.285	14,6	4,07	-31,4
Australia	91	-27,3	500	-19,7	5,48	10,4
Others	518	20,2	2.872	12,1	5,54	-6,8
Total	38.872	20,3	360.313	45,0	9,27	20,5



BRAZIL

	Litres		\$		\$/litre	
	2020	% change	2020	% change	2020	% change
France	318.124	35,7	2.559.371	3,1	8,05	-24,0
Spain	304.713	53,7	884.467	45,2	2,90	-5,6
Italy	319.609	-29,6	862.282	-22,1	2,70	10,6
Argentina	155.555	-5,9	440.128	-16,2	2,83	-11,0
Chile	93.439	658,6	267.037	363,1	2,86	-38,9
Portugal	13.229	-83,4	48.930	-75,9	3,70	44,7
Others	18.619	435,3	350.771	932,0	18,84	92,8
Total	1.223.288	6,7	5.412.986	7,8	4,42	1,1





CHINA

	Litres		\$		\$/litre	
	2020	% change	2020	% change	2020	% change
France	384.258	-27,7	9.065.609	-25,0	23,59	3,7
Italy	956.450	-32,9	3.488.676	-31,7	3,65	1,8
Spain	465.686	75,0	1.022.094	34,5	2,19	-23,2
Australia	204.276	-14,9	863.823	-14,5	4,23	0,5
Germany	146.949	-19,0	437.729	-24,6	2,98	-7,0
South Africa	6.982	-6,7	24.599	-30,1	3,52	-25,1
Chile	3.822	-20,0	20.416	-39,1	5,34	-23,9
Others	78.292	-58,4	268.036	-54,3	3,42	9,8
Total	2.246.715	-21,0	15.190.982	-24,8	6,76	-4,8



HONG KONG

	Thousand litres		Thousand HKD		HKD/litre	
	2020	% change	2020	% change	2020	% change
Singapore	86	-48,0	36.775	-29,6	427,82	35,3
France	138	1,7	34.494	-5,5	250,20	-7,0
UK	20	10,7	4.304	-31,9	215,73	-38,5
Italy	81	-16,6	3.981	-22,5	49,37	-7,1
Australia	17	86,1	3.016	295,8	180,78	112,6
Germany	3	-65,2	1.244	-55,8	369,80	27,0
Others	68	-23,8	8.170	-75,4	119,55	-67,7
Total	413	-21,2	91.984	-32,9	222,83	-14,8



SOUTH KOREA

	Thousand litres		Thousand \$		\$/litre	
	2020	% change	2020	% change	2020	% change
France	236	-11,9	6.793	-8,5	28,77	3,8
Italy	336	-27,9	1.576	-29,3	4,69	-1,9
Spain	168	-7,2	593	0,3	3,53	8,2
South Africa	253	-14,3	569	-4,5	2,25	11,4
USA	24	-52,3	121	-51,8	5,00	1,1
Australia	21	0,6	97	-29,7	4,72	-30,1
Chile	20	-20,3	90	-21,7	4,40	-1,8
Germany	21	-37,2	70	-44,9	3,37	-12,2
Others	13	-75,5	59	-70,6	4,40	20,0
Total	1.093	-21,7	9.968	-14,6	9,12	9,0



JAPAN

	Thousand litres		Thousand Yen		Yen/litre	
	2020	% change	2020	% change	2020	% change
France	2.992	-7,9	12.335.925	-6,0	4.123,38	2,1
Spain	2.309	-14,9	1.003.225	-16,8	434,48	-2,2
Italy	1.538	7,5	907.783	4,3	590,10	-2,9
Australia	397	-16,3	216.595	-20,8	544,99	-5,3
Chile	351	-9,4	161.248	-5,6	459,72	4,2
Others	184	-19,1	200.037	5,7	1.088,29	30,7
Total	7.771	-8,4	14.824.813	-6,3	1.907,68	2,2

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## CAMPAGNOLA

### Campagnola high cutting speed plug-in shears

The new Campagnola electric shears without cable, equipped with a plug-in battery, are the best solution for pruning in complete freedom of movement. Handiness, speed, and power make these shears the ideal companions for pruning flowers, vineyards, orchards, citrus and olive groves, as well as ornamental plants. Speedy, Stark M and Stark L are the plug-in shears of the Campagnola Green Line. Light, comfortable, and easy to use, they make the operator's work less tiring. These electric shears reach a very high cutting speed, up to almost 80 cuts per minute, and are fitted with an automatic cut-off system to prevent the blades from getting stuck in the wood of very thick branches. The latest novelty by Campagnola - a company committed to the innovation of pruning and harvesting systems for over 60 years - is the patented extension cable for the plug-in shears. This cable allows the operator to remove the plug-in battery from the shear and put it into a case, this way significantly reducing the weight of the shear and the user's effort during the last working day hours. Moreover, the new Stark M and Stark L models can be connected to a telescopic extension pole. Its desire to always find new solutions to facilitate the operator's work and its long experience are the engines that drive Campagnola in its continuous search for innovative products and solutions to guarantee excellent performances.



## CIMA

### Dosa, the first low volume sprayer with pneumatic atomization fitted with anti-drift diffuser

Research, innovation and great passion are the three keywords of Cima's success, a company specialized in the design and manufacturing of equipment for crop protection. An extremely qualified and technologically advanced range of sprayers, able to offer the most valid answer for every need in the spraying sector. One of the most prominent proposals of Cima's range is the Dosa model (Droplet Size Adjustment), the first pneumatic sprayer with anti-drift diffuser, expressly designed by the technicians of the Pavia-based company to reduce the impact of pesticides both on the environment and on human health. Developed in collaboration with the Department of Agricultural, Forestry and Food Sciences (Disafa) of the University of Turin, the new Cima sprayer is designed to contain the drift effect by producing, depending on op-

erational needs, larger drops without modifying the volume or the speed of the supplied air, and also without changing the quantity of product distributed per hectare. In short, thanks to this particular constructive solution, Cima's sprayer is able to control the dispersion of the pesticides especially on vertical cultivations, i.e. in orchards and vineyards.



## DELLA TOFFOLA GROUP

### We never stop innovating

With eight productive units in Italy and abroad, ten foreign sales offices, and distribution and assistance guaranteed all around the world, Gruppo Della Toffola offers a point of reference today for all the technologies used in the entire winemaking process, from grape receiving, pressing, filtration, processing and then bottling and packaging. A new line of three different smart pneumatic press models has recently been launched that amounts to an unprecedented development in winemaking pressing technique. All these models have closed tanks with central membrane and come with a new, completely redesigned User Experience and advanced sensors that detect the type and quantity of the product loaded. An Artificial Intelligence system optimizes the pressing cycles for a drastic reduction in the processing time. The automatic models are also equipped with an automatic washing system, and all the work phases

(loading, pressing, discharge, rinsing, washing) are autonomously managed by the machine without requiring any intervention by the operator. The line is completed by the continuous pressing center. Featuring all the functions of the other models, the system is composed of three or more presses that continuously process product inflows and outflows. The pressing center ensures levels



of quality and efficiency never seen in the market before while maintaining enviably easy use. Quality, service, and flexibility are the values at the heart of this constantly developing with over 60 years of experience, 120 grape harvests, and the design and construction of equipment for more than 250 wineries around the world top its credit. Innovation continues.  
[www.dellatoffola.it](http://www.dellatoffola.it)

## ENOMET IMPIANTI

### Introduction to Our Company

# ENOMET

IMPIANTI ENOLOGICI

Enomet Impianti Srl has been working in the oenological sector since 1996, operating in planning and producing machinery for the oenological sector. Our firm is made of a team of 15 people with two oenologists and different qualified technicians. We operate in Italy and abroad, developing projects of complete wine cellars and taking care both of the architectural and the technological aspects. We propose innovative fittings through different brevets and thanks to personnel that have matured an experience of 40 years in the sector. In particular, our activity focuses on the project and development of new technologies, on the design of machines and processing lines, on the manufacturing and marketing of oenological plants, such as Destemmer-crushers and selection lines, Membrane pneumatic presses, Must clarification machines, Vacuum rotary filters, Kieselguhr filters, Plate filters, Cross-flow filters, Reverse osmosis, Tartaric stabilization machines, Cooling units, Heat exchangers, Control boards to control the fermentation temperatures, Cooling plates, Classic and Charmat method machines, Machines for production of the beer, Nitrogen generators and plants, Machines for the recovery of CO2, Automatic machine for Batonnage, Bottling plants - automatic and semi-automatic, Pumps of several types, Stainless steel reservoirs, Barriques, barrels and relevant fittings, Plant engineering and stainless steel pipe fittings.

## ENOVENETA

### Enoveneta, Technological Partner for Winemaking

Enoveneta was founded in the 1960s, and over 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 designs, produces and trades 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 suit their production needs at best. 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.

[www.enoveneta.it](http://www.enoveneta.it)



## GRUPPO BERTOLASO

### Bertolaso. A Story of Dedication and Skill

Anniversaries offer an opportunity to assess one's progress. In 140 years, Bertolaso has become an international benchmark in bottling. It is a moment to reflect on the values that have inspired it to create its advanced systems for producers of wine, sparkling wine, spirits, water and soft drinks. "Our history has taught us the importance of always being prepared to welcome the new and react accordingly," Cristina Bertolaso says. "In this, our values remain unchanged." On the one hand, there is flexibility, innovation and a focus on performance; on the other, there is reliability, constant vigilance and compassion. In fast-changing times, this union of versatility and dependability is essential. "A new way of producing is emerging where the ability to adapt is key," Cristina Bertolaso explains. "The technologies we are developing focus on the possibility of working with different types of bottles and different types of products depending on one's needs, and with the same level of efficiency." The rest is thanks to its quality and the promptness of the after-sales service, which has been enriched in recent weeks with new technical support services. Founded in 1880, the Bertolaso group is now present across the globe and dedicates the vast majority of its production to its international customers. From the very first inventions of founder Bortolo Bertolaso to today, things have changed but with each passing anniversary the talent and commitment to innovate remain a constant.

## GUALA CLOSURE GROUP

### Guala Closures and NESTGATE - Connected Closures



Guala Closures Group has long been at the forefront of innovation for non-refillable closures and is a leading global manufacturer of aluminium closures, with four international R&D centres for design and product innovation and one dedicated to new processes. At this last centre, in Foetz, Luxembourg, its knowhow has led to the development and production of large-scale intelligent packaging, leveraging IoT systems (Internet of Things) and using integrated NFC (Near Field Communication) tags or QR codes. The result is NESTGATE™ connected closures, which be-

come media touchpoints, delivering consumer engagement metrics plus valuable data acquisition, via smartphones. Features include anti-counterfeiting tools, from unique serialized IDs to blockchain systems; while Track & Trace records the entire product journey. Dynamic digital content for direct consumer engagement is undergoing continuous evolution. NESTGATE™ connected closures already collaborate with great brands. In the USA Pernod Ricard was the first to use them for its *Malibu Rum* Summer Games promotional campaign (June 2019) and again for *Jameson Whiskey*

connected bottles in Ireland, with NFC conveying content that changes every month (March 2020); Californian wine brand *Böen* has adopted NFC caps for its entire production (August 2019); in Europe *Vigneti Massa* wines integrated NFC closures for authentication and traceability via blockchain, plus customer engagement (January 2020). NESTGATE™ connected closures is a complete and customizable range of safety, aluminium and luxury closures for wine, spirits and olive oil. Stay tuned for the next evolution!

See the NESTGATE™ website: [www.nestgate-gualaclosures.com](http://www.nestgate-gualaclosures.com)

## GAI MACCHINE IMBOTTIGLIATRICI

### How the Partnership Between Gai and Birrifificio Rurale Minimized the Oxygen Pickup During Cans Filling

"The profession of the brewer is art and science. Art chooses the ingredients, science allows to transform them in beer". Words by Lorenzo Guarino who, together with his partners, since 2009 has been leading the Birrifificio Rurale, an award-winning craft brewery in Desio, in Brianza. Mr. Guarino represents the creative side of Birrifificio Rurale, Mr. Gai the technological one. A partnership started in 2012 with a gravity filler, today moved to a MLE 6661 CAN, linear isobaric monobloc able to fill over 1.600 cans/hour. The growth of the brewery has been followed by Mr. Gai with a particular attention, by a technical-creative collaboration which brought both companies to grow and experiment in the sector of canned beers. The proximity between Mr. Gai and Birrifificio Rurale has led to even improve the already very good results referred to the oxygen pickup of the fillers for beer. "Each milliliter of air accidentally added during the filling increases the total oxygen of 300 ppb," Mr. Guarino explains. "We needed this threshold to always remain below 50 ppb." Mr. Gai has consequently provided the new MLE 4441 CAN which, always guaranteeing a very good filling speed, has halved the oxygen, from 40 ppb of the previous version to the actual 20 ppb. A result beyond expectations, thanks to the new isobaric valve UNICA, patented by Mr. Gai, and to a filling process, CO<sub>2</sub> saturating each working phase, breaking down the entry of the oxygen between the lid and the liquid.

"Results have been so encouraging that convinced us to order the new model, MLE 6661 CAN," Mr. Guarino concludes. "We are currently experimenting with the newest CAN ROTATIVA, a technological marvel of 24 electro-pneumatic valves with seamers at three head. As per the first tests, this machine seems promising higher speeds and an even greater reduction of the oxygen pick-up: we thought Mr. Gai was a supplier, but that's more, it is a partner."



## IDEAL

### Ideal Solutions for Your Vineyards

Since 1947, Ideal has been producing sprayers of all kinds and for protection of all types of crops, focusing on both product customization and innovation. And despite the awkward moment worldwide, Ideal continued its commitment in improving its offer, to meet both laws and markets requirements. Models for vineyard protection are many and with different features. Among low volume sprayers the most technological and environment-friendly remains Drop Save, allowing automatic work as well as a 50 percent recovery on average thanks to its special computer and anti-drift panels. Other solutions for vineyard are Ideal low volume sprayers with multi-row boom like Supra or Diva, permitting to spray up to three rows contemporarily on vineyards with a very low liquid supply per hectare, for focused treatment. Also, Bora model deserves to be mentioned: its special configuration with fan groups hanging on tractors and tanks trailed by a tracker drawbar make it the perfect machine to work on more rows of espalier vineyards on hilly grounds. In addition to low volume models, Ideal provides various sprayers with



axial fans anyway, 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 products offered by Ideal for vineyard protection, which has been working for over 70 years to find the best care for your crops. Please visit our website [www.idealitalia.it](http://www.idealitalia.it) for more information.

## METALUX Metalux Capsules Worldwide Producer

**M**etalux Capsule was established in 1964 by Dino Illario 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, aluminum wine capsules, capsules for sparkling wines and PET capsules. The main activity of the company is the production of PVC, PET and aluminum bottle capsules, according to the latest technologies in production processes. 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". You can contact us by phone at +39 0421 331266, +30 22410 81767, or send an e-mail to [info@metaluxcapsule.it](mailto:info@metaluxcapsule.it) [manager@metaluxsa.com](mailto:manager@metaluxsa.com) or visit our website [www.metaluxsa.com](http://www.metaluxsa.com), [www.metaluxcapsule.it](http://www.metaluxcapsule.it).

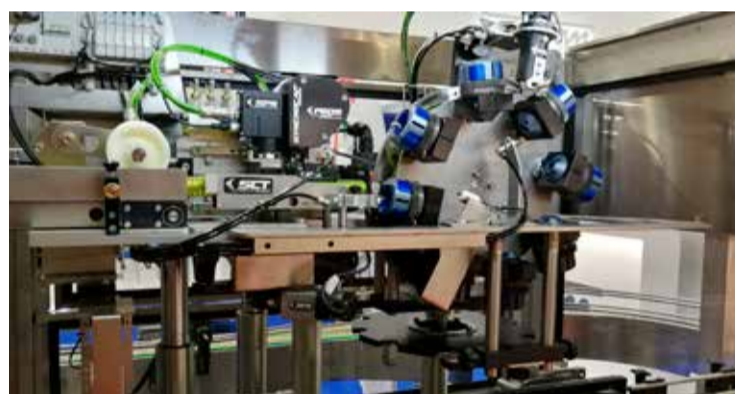


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## NERI FILIPPO & C. SNC Neri Filippo & C. is... Innovation!

**N**eri Filippo & C. Snc has always been committed to researching and developing innovative machinery that meet customer's logistic requirements and that fully respect the environment. Its highly innovative anti-condensation automatic conditioners are evidence of that. They eliminate condensation permanently in much shorter time than similar systems, and achieve energy savings of about 50-70 percent. Bottles are sometimes in factories where inside temperature is lower than room temperature. Hence, the

condensation that follows may jeopardise perfect labelling and generate mildew inside the packages. When the cycle terminates the bottles leave the conditioners perfectly dried and ready to be labelled. Automatic orientation has been totally developed with a more compact external structure and high technology, as to streamline product time. Leading-edge orientators are electro-pneumatic and feature a highly fast and reliable CPU and control panel for management and diagnostic. These orientators can also be provided with equipment featuring smart cameras that sort and select the corks for fine wines, heating tubes. Neri Filippo automatic washing-drying machines perfectly wash bottles neck and body, removing any impurity in the outside surface of full bottles. In the second phase, wet bottles are perfectly dried. The company can make also a group consisting of washer, conditioner and drier. Automatic elevators, both standard and vertical, stand as a good help in cork and capsule feeding, and they also easily adapt to different length and height.



ing and parameters of the various components based on the type of capsule in work. This new system is absolutely future-oriented as it represents a further step forward in the era of industrial digitalization and a real device that can be used in a working system with Industry 4.0 standards.

For all news, videos and much more, please go to our website [www.nortan.it](http://www.nortan.it) or visit our Facebook page [facebook.com/nortansrl/](https://facebook.com/nortansrl/)

## NORTAN

### New Syncrocap Capsule Distributor

**T**hanks 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 percent 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. This new distribution system provides perfect functioning, where mechanics and electronics are designed and merged to create a unique symbiosis: management, handling and setting are managed and controlled by servo drives capable of self-regulation according to the

type of capsule to be processed. 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 tim-

## ORIZZONTI

### Over 40 Years of Passion. The Vineyard Specialists

**O**rizzonti is an Italian company specialized in the design and construction of agricultural machines for vineyards and orchards. Over 40 years, it has acquired extensive experience in viticulture and fruit production technology. Its strength in these sectors is ensured by the commercial, production, and distribution organization and by the wide range of machinery working the soil, adapted to satisfy any type of task. The use of high-quality raw materials makes

Orizzonti Srl one of the leading Italian manufacturers in this sector. Orizzonti is the ideal answer for everything related to the vineyard equipment and machinery, generally used in the care of rows and the inter-row soil of vineyards and orchards, with elasticity in designing and implementing always new solutions that the market requires. Precise and defined production and testing cycles, specific technical training of the managers, continuous technological research, are some

of the ingredients that, within efficient and current know-how, work together to keep the Orizzonti technologies in step with the combined technology of the sector. Our machines for soil cultivation and pruning of the canopy of vineyards and orchards are always subjected to stringent efficiency checks in the field, our company annually participates in different field tests in many Italian regions, to show to all winemakers the quality and robustness of our equipment. Check out more on our website [www.orizzontimacchineagricole.it](http://www.orizzontimacchineagricole.it)



## SUGHERIFICIO DI BUSSOLENGO

### Deviations, Soluble and Invisible Foreign Matter



**T**he issue of organoleptic deviations is a fundamental yet troublesome matter of discussion amongst us cork manufacturers, used to focusing solely on detecting TCA levels. The main source of wine deviations and wine contamination is the cork itself, causing a deviation of as high as 60-70 percent. Residues from various treatments, coadjutants used in the production process, non-stabilized lubricants used before packaging, the use of sulphuric dioxide (an allergen) during packaging to reduce oxidizing residues before delivery, are only some of the critical aspects of the bottling process that can lead to irreversible

modification of the product, providing an opportunity for alternative corking. "Sugherificio di Bussolengo" applies its own new revolutionary system, called Pre-Coating; a 30 hour process applied before the last stage of packaging to assure NO contamination from the cork. We are proudly working alongside a spe-

cialized laboratory to create a specific analysis to detect and confirm the exact molecule and determine the cause of deviation. Our Pre-Coating is 100 percent free of charge and comes with our certificate of guarantee and quality. Sugherificio di Bussolengo is focused on enhancing your wine and safeguarding the cork sector.

54<sup>th</sup> EDITION

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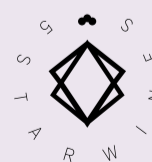
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