SIMEI 16-19.11.2021 Milan - Italy

A NEW INSIGHT IN THE WORLD OF WINE

Speaking to the global planet of wine and telling it through words, as well as with numbers, data and features, analyses and scenarios. This is why this new special edition of Il Corriere Vinicolo – in its second issue – 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.

SIMEI 16-19.11.2021 Milan - Italy

WINE WORLD MAGAZINE

by IL CORRIERE VINICOLO

special edition vinitaly

SUPPLEMENT TO ISSUE 37 OF IL CORRIERE VINICOLO, 23RD NOVEMBER 2020

Published by UNIONE ITALIANA VINI, Italy's Union of Wine Producers, headquartered in Milan, 3, Via San Vittore al Teatro
Ph: +39 02 72 22 281, FAX: +39 02 86 62 26. Website: www.corrierevinicolo.com

Registered at Milan's Court, N. 1132 on February, 10, 1949. Tariff R.O.C. Poste Italiane Spa, sent via postal service, Law Decree 353 (conv. in L. 02/27/2004 n. 46). Art. 1, comma 1, DCB Milan. Printed by Sigraf, Treviglio (Bergamo). Member of USPI, Association of the Italian Periodical Press

UNIONE ITALIANA VINI'S NEW IT-STATISTICS PLATFORM IS ON ITS WAY

WINE OBSERVATORY

3 Million Records Just A Click Away

PAGE 3

The architecture of the innovative tool developed by the Unione Italiana Vini will be presented at wine2wine. When fully operational, it will consist of four sections dedicated to world trade, production potential, the bulk market of all wines and sales performances of the Italian DOs and IGs. The first trial of the system described by business men using it in preview. "It is a revolution in data culture that will make a huge series of statistics easily accessible to everyone," Paolo Castelletti, secretary general of Unione Italiana Vini, commented

APPELLATIONS

BAROLO When The Origin Marks The Success Of A Wine

Page 15

PRODUCTS

Sparkling Wine + Rosé? Or A Brand-new Category?

As sparkling wine consumption booms in Italy and across the globe, the introduction of new products like Prosecco Doc Rosé opens up questions on how to categorize it and market it. Page 26

wine2wine

A WIDE-RANGING INTERVIEW WITH THE GENERAL MANAGER OF VERONAFIERE

And, From The Screens Of Wine2wine, Wine Is On Air

Launching the inauguration of the seventh edition of wine2wine – in a complicated context as the present one – can already be considered a success. After the recent, quick transformation of the exhibition into a completely digital event, we are having a framework, which was unimaginable until some days ago, that included a large number of operators registered as users on the online platform, a comprehensive schedule of meetings and attendees of great interest, as well as a convinced participation from the whole world of Italian wine associations following the invitation of Veronafiere. This is an "assembled puzzle" celebrating the importance of the Veronese event on the agenda of international and Italian wine.

Among the challenges of the sector, that of Veronafiere has certainly been one of the most difficult ones. An economic sector in distress, with thousands of enterprises in great difficulty, an exhibition system halted by the Government's measures implemented to face the health emergency, along with internal and external, fierce competitors. All these elements made even steeper the path towards an event that today everybody is considering with enthusiasm as the "ideal flag" of the "restart" route. It is a remarkable outcome due to tenacity and determination, which are bearing fruit. In this wide-ranging interview, the general manager of Veronafiere, **Giovanni Mantovani**, speaks about the work carried out, about what to expect from the four-day *digital* exhibition focused on wine, on the trends of the wine market and from the new coexistence of online and in-person events and, more broadly, from the future, with an eye (and more than a thought) on the next Vinitaly.

More than 50 seminars, b2b meetings, workshops, 12 wine tastings held remotely from Europe, China, the U.S., Japan and Brazil, and Operawine. It's a busy schedule for a special edition. The goal is education and nurturing new ideas on how to operate in our "new world" and "new normalcy." Italian wine's troubles amidst export, HORECA crisis and the need to "act as one" as told by Giovanni Mantovani, who is looking at (and thinking about) the next Vinitaly

PAGE 2

NEW FRONTIERS

Wine Can (Also) Be Made In Water

Can water help wine? Some producers in Europe are experimenting with underwater aging and are having interesting results.

PAGE 34

GLOBAL MARKETS

GERMAN SOLIDITY PUT TO THE TEST BY COVID-19

During the pandemic, Germany has been a bastion of Italian exports. Veronika Crecelius, correspondent for the leading German wine magazine, explains how.

Page 21

photo ©Ennevi

wine2wine

A WIDE-RANGING INTERVIEW WITH THE GENERAL MANAGER OF VERONAFIERE

Wine2wine 2020 brings wine back on the virtual screen of Veronafiere, which confirms to be a important player in the sector. Over 50 seminars, b2b meetings, webinars, workshops and 12 wine tastings will be held remotely from Europe, China, the United States, Japan and Brazil reserved for foreign buyers, together with Operawine, featuring 70 international speakers in an unprecedented schedule for a special edition.
The target is to gather business, contents, meetings, professional training, as well as ideas, to understand how to move in our "new world" and in our "new normalcy."
The difficulties of wine in different markets, export trade and the crisis of HORECA are told by Giovanni Mantovani, who looks to (and thinks about) the next Vinitaly

GIOVANNI MANTOVANI

photo ©Ennevi

Mr. Mantovani, we envisaged a physical trade fair event, the return of buyers to Verona, the exhibition area, the showcase of Operawine, a safe way to do networking. Then the closure. Why did you decide to organise wine2wine anyway?
It was a necessary change. After the decree issued by the Italian Government at the end of October, any trade fair event is forbidden in person. Nevertheless, we wanted to keep the agenda of an event that was created with the aim to gather business, meetings, professional training, as well as ideas to support the wine-growing and winemaking market in a very delicate and difficult period, with a positive perspective and getting ready for the post-Covid phase. For this reason, we set up the maximum possible interaction for an event that necessarily had to be totally transferred online in a few weeks, with a schedule of top-quality contents and business attendees. It will be a service event – and for that we thank the numerous partners that collaborated with us to create the best conditions for the restart of the sector.

This is obviously a difficult year also for Italian wine and the new closures will even more affect the economic outcome of the companies. That said, our export loss is estimated around 50 percent of the global export average and three times less than the French one. How could you explain this fact?
It is true, exports are decreasing, but we are earning market shares. On average, we are losing less than the other countries. There are several reasons depending on many factors in the different areas. In the United States, which alone are covering almost 30 percent of our global exports, we benefited from a flying start, with +40 percent in the first two months of the year. Moreover, we were spared customs duties. This allowed us to bridge the gaps left by our competitors that, in full health emergency, suffered very heavy losses. In general, we can say that we have had the advantage of a wider range of products, certainly more competitive in the quality/price ratio. In addition, with regard to distribution, we showed a greater balance among the on and off-trade sales channels. To give you an example, referring to U.S. records again, Italian wine registered a very strong upturn in the retail channels in the period of the strictest lockdown (from 18 April to 11 July), a 39 percent growth compared with the same period of last year. On one hand, it strengthened the Italian leadership among imported wines on the shelves of liquor stores and mass-market retail stores and, on the other hand, it partially compensated the loss on the HORECA channel, which is in objective difficulty. That said, it is also wrong to minimise and not to consider that there is a whole segment of Italian supply to the HORECA sector, that is suffering very heavy losses.

In the meantime, we restart from wine2wine. What is the main goal?
The goal is clear and we can see it in the daily relation with winemakers and international markets. It is to be a real support in the relation between companies and markets. In this period, everyone has been using their own instruments, but the feeling is that there is a lot of improvisation and an inclination to live day by day. The market is undoubtedly in difficulty and the companies begin to see the curve of a possible restart. Therefore, wine2wine is taking place in a moment when we are trying to offer some strategies to understand how to move in our "new world," in our "new normalcy."

The schedule is very rich, ranging from professional training to business, passing through the analyses of trends. Will a platform be able not to make us regret the traditional event?
We are convinced that digital events could never replace physical events, relationships or contacts in person, on which also commercial relations are founded. That said, it is clear that under this circumstance digital tools and media can contribute to bridge the distance among operators. Therefore, wine2wine "goes on air" with a schedule including b2b meetings, webinars, workshops and 12 wine-tastings remotely held from Europe, China, the United States, Japan and Brazil, reserved for foreign buyers. "Veronafiere plus" Platform will then host the wine2wine exhibition, over 50 seminars of the wine2wine business forum together with Operawine, with the presence of Wine Spectator throughout all exhibition and forum days, remaining available online for possible chatting with the companies.
We will open the four-day event with the International Summit on Saturday 21 November (10.30 am) on the theme "The future of wine: different visions, one perspective. Current scenarios and possible challenges for next decade." It will be attended by international and Italian players of the sector and institutional representatives, such as Raffaele Borriello, Director of ISMEA (Service Institute for the Agricultural and Food Market), Carlo Ferro, president of ICE (Italian Trade Agency) and Teresa Bellanova, Minister of Agricultural Policies. During the meeting, there will be a presentation of a research project carried out by Nomisma Wine Monitor for Vinitaly Observatory, which, in addition to providing market data regarding the most complicated year ever experienced, develops a survey conducted on the Italian companies to draw the profile of wine business in the post-Covid age.
In the afternoon, OperaWine will host the presentation of the 100 top producers 2020 by Wine Spectator, followed by a session of questions and answers. Among the numerous events on schedule, there will also be the Congress Day of Assoenologi (Oenologists Association) 2020, on Sunday, November 22, and the Round Table "Wine and Mass Market Retail Distribution facing the change," dedicated to the Italian Retail Channel, on Monday, November 23. Over fifty digital sessions are scheduled in the wine2wine business forum, involving seventy international speakers dealing with market issues, such as globalisation, post-Covid, new consumption and purchase procedures, wine tourism, marketing and digitalisation. Two special sessions will concern women's leadership and inclusivity in the wine industry. On schedule is also the conference on the theme "Wine in the changing, global scenario: the challenges of the wine production chain" (November, 23), which will be attended by the top managers of Federdoc, Unione Italiana vini, Federvini, Alleanza per le cooperative, Fivi and ICE.

photo ©Ennevi

Exhibitions are suffering even more than wine and wine, without the exhibition business, pays an even higher price. How do we solve this situation? China restarted.
As we will also see in the wine2wine forum, the digital dimension will more and more complement the physical part, but an exhibition remains a unique event, which is hard to replace with other tools. A good example of this are the events in person organised in China: those of Vinitaly Road Show held in Xiamen, Shanghai and Chengdu last September, as well as Wine To Asia, scheduled to take place in Shenzhen on November 20 and 21. It will be its first edition this year and it also risked being cancelled more than any other events. On the contrary, it went beyond the expectations, with more than 200 exhibiting companies and half of them from Italy. It will probably be the only event, in which wine and, in particular, wine made in Italy, will be discussed in continental China, in a city that is becoming a symbol of the new China, Shenzhen, at the centre of the Great Bay Area. In addition, all scheduled events are *sold out* and that says a lot about the expectation of a real event in person, even if in a market where the use of digital and online tools and media is really advanced.

Are you already thinking about the next Vinitaly?
Organising an exhibition, especially an international trade show requires a lot of time and work. The organisers know it and so do exhibitors, who often start working on the event many months before, in order to make the most of their participation. With regard to Vinitaly and of the 40 events linked to it every year, we can affirm that there is never a beginning or an end, but a "continuum," especially with the postponement of the 54th edition of the exhibition from this year to 2021. Veronafiere, with its top managers, is a member of the boards of the Italian and International Trade Fair Associations, such as Ufi and Aefi. In this period of really great difficulty for the sector worldwide, we are trying hard to set up a reasonable schedule for 2021, in line with the needs of the sectors and the markets of reference. The dates of an international exhibition cannot be improvised. In order to be ready, we have to work well in advance and, in order to work well in advance, we have to be sure that it is possible to organise the events that we schedule.

WINE OBSERVATORY

UNIONE ITALIANA VINI'S NEW IT-STATISTICS PLATFORM IS ON ITS WAY

The architecture of the innovative tool developed by the Unione Italiana Vini will be presented at wine2wine. When fully operational, it will consist of four sections dedicated to world trade, production potential, the bulk market of all wines and sales performances of the Italian PDO and PGI wines. The first trial of the system described by business men using it in preview. "It is a revolution in data culture that will make a huge series of statistics easily accessible to everyone," Paolo Castelletti, secretary general of Unione Italiana Vini, commented

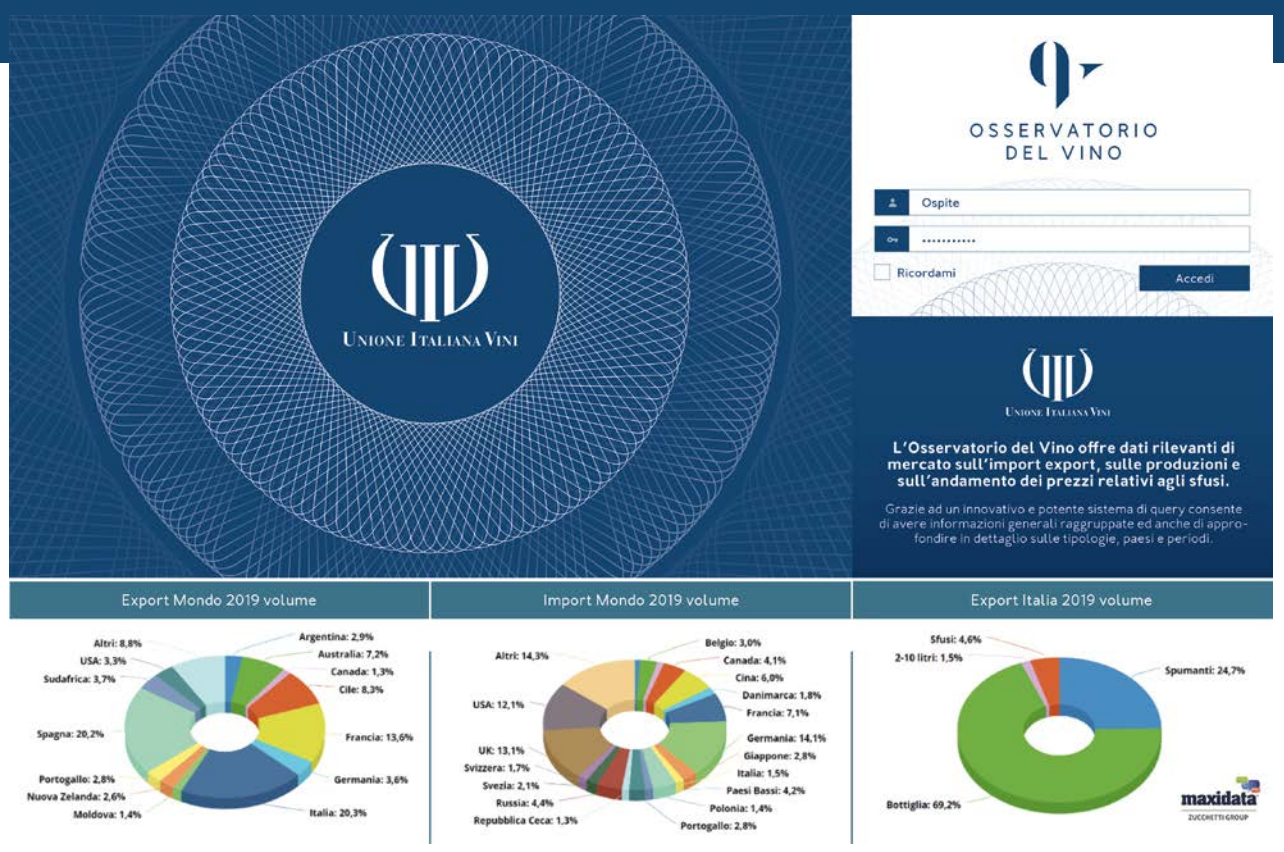
WINE OBSERVATORY
3 Million Records Just A Click Away

It just takes a click to find out the export curve of Prosecco to the USA in recent years and to compare it with Champagne and Cava on all the destination markets, or to monitor the price trend for bulk Barolo in the last five years, and compare it with Brunello di Montalcino and Amarone della Valpolicella, or even the development of exports of white or red DOC Sicilia wines, Asti or Montepulciano d'Abruzzo to every country in the world. But also, the trend of DOC status claims and bottling of all the other 500 Italian PDO or PGI wines, as well as comparing the monthly development of wine and must stocks in recent years. The secret lies in a "friendly" dashboard, as we say in digital jargon, thanks to which we will no longer be faced with tables of static data in Excel or PDF format, but a dynamic tool that will enable the user to autonomously build the tables and statistical analysis he needs. Behind all of this is a complex, original and highly innovative IT architecture, developed by the company Maxidata, which has been implemented with a huge amount of data, equal to over 3 million records. These data describe the trends of the commercial wine world, production, bottling, stocks and bulk market of the Italian sector and sales in the different distribution channels, covering the past ten years.

The new Wine Observatory developed by the Unione Italiana Vini is all this, and much more. In many ways it is a historic turning point in the analysis, processing and accessibility of economic data of the sector. After two years of intense work, we have the first release of the platform, which will be officially presented at the seminar organised within wine2wine called "The Wine Observatory by Unione Italiana Vini: data sharing for the Italian wine industry" (Monday 23rd November from 2 pm to 2.30 pm). During the meeting, producers, consortia representatives and wineries from Italy will discuss the importance of data analysis in the construction of business strategies on both a production and a commercial level.

This sector is fully aware of the importance of having data and statistical analyses on the economic situation in which a company operates. But it is just as clear that figures on the winegrowing sector, concerning production and the market, are not enough to meet the needs of companies. This is because of a lack of - or gap in -, official data, due to the resistance of many business professionals to make the reliable construction of market analysis possible with respect to the different distribution channels (especially HORECA, but also details of exports), through business data being made available, also once the fundamental requirement of company privacy has been guaranteed on the subject of sensitive data. In this work of a strictly "political" nature around the data, the new Wine Observatory is also a new opportunity for the sector, because it will offer ways of purchasing and aggregating company data in complete anonymity and privacy, thanks to the use of the latest IT technology and advanced encryption systems.

"The technical aspects of our new Observatory, which I would define as revolutionary, will enable us to overcome the static nature of tables," **Paolo Castelletti**, secretary general of Unione Italiana Vini, commented. "And it will put us in the position to autonomously construct all the analyses and forecasts that we need. In addition, this tool will enable us to improve the 'data culture' in the winegrowing sector on behalf of wineries and consortia, as well as institutions and arriving at the political level. Today, the internet has made an enormous amount of data that can be found on the net 'available' but not 'accessible' and, in order for professionals to use them, they firstly need to be found, processed, standardised and interpreted. It is a hard, demanding job that often proves almost impossible for many entrepreneurs, especially of small and medium-sized companies who don't have the time or the ➔



THE WINE OBSERVATORY'S HOME PAGE
The first data base on **World Trade** in Italian and English is already available for consultation. For information on how to access it, please email at: **osservatoriodelvino@uiv.it**

PAOLO CASTELLETTI, SECRETARY GENERAL OF UNIONE ITALIANA VINI

means to do this research. With our new Observatory, the easy, simple and immediate possibility of processing data analysis and forecasts on imports and exports to all the countries in the world, from bottling, to bulk prices of hundreds of Italian wines and winegrowing products, will be made available to everyone."
"We are convinced that the new Observatory will open a new phase of data analysis of Italian and international wine," Mr. Castelletti concluded. "Offering more chances to process analyses and strategies on all levels (company and institutional) in a highly innovative way. And positive feedback coming from entrepreneurs who are testing the Beta version of the new Observatory is an important and invaluable confirmation."

What Is The New Observatory And How Does It Work?

World wine trade, production, bottling and stocks, bulk market. An advanced digital platform, a single centre for gathering data, with infinite possibilities for queries. These are the foundations that the pillars of the Unione Italiana Vini's Wine Observatory platform rest on, a digital infrastructure that has been created to aggregate and standardise data from different sources and to allow enterprises to carry out research on different levels, both general and in-depth. The Observatory developed innovative tools of data interrelation, crossing and extraction which means that, for the first time, it is possible to have the necessary strategic information quickly at your fingertips, in order to know the state of the present and historic situation, and to outline medium-term scenarios, an indispensable requirement for developing success strategies.

Infrastructure And Database

The Wine Observatory is first and foremost a powerful IT infrastructure. It was devised by Unione Italiana Vini on the basis of the needs expressed by companies and created by Maxidata, a software house of the Zucchetti Group. The Observatory consists of three distinct platforms for the gathering, processing and personalised release of data, for a total volume of over 3 million records available, which can be crossed thanks to the various levels of queries implemented.

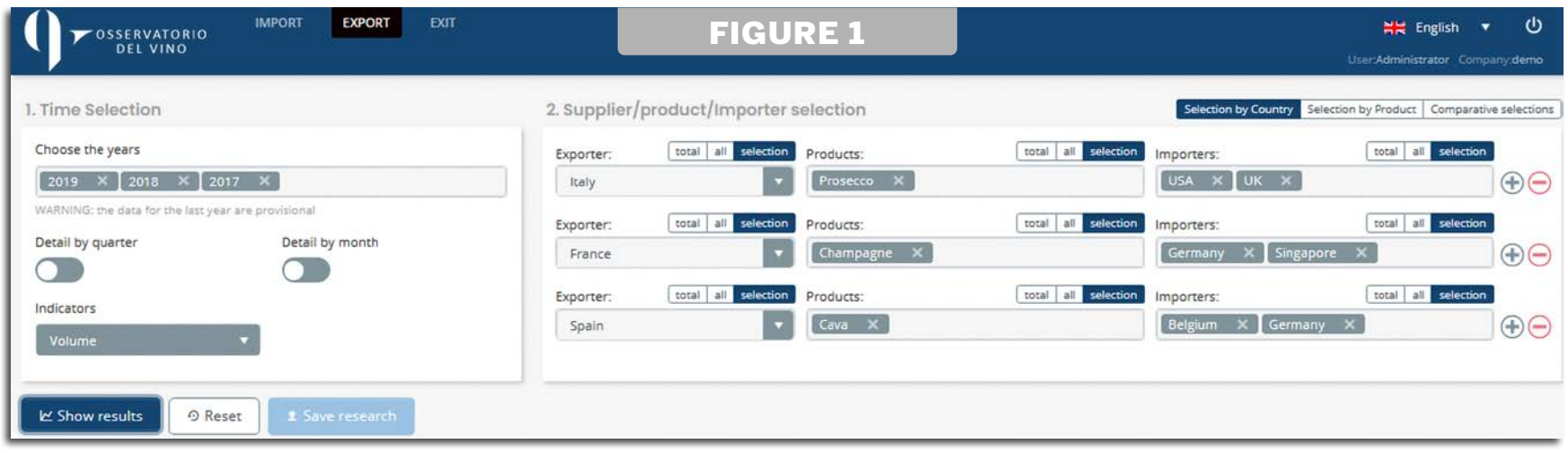


FIGURE 1

FIGURE 2

Description	Supplier	Importer	2017	2018	2019
Champagne	France	Germany	9.264	9.057	8.749
Champagne	France	Singapore	10.593	10.530	9.928
Prosecco	Italy	UK	90.577	90.027	96.782
Prosecco	Italy	USA	43.041	48.049	67.174
Cava	Spain	Belgium	20.166	20.338	20.087
Cava	Spain	Germany	23.014	22.581	22.016

World Trade

The Import-Export platform aggregates the data of countries importing and exporting wine, for a total of over 90 percent of annual global traffic, starting from 2010.
The wine categories present (120) are in the international Combined Nomenclature (CN), therefore sparkling, still/semi-sparkling packaged wines, bag-in-box and bulk wines, obtained from official channels of data dissemination (customs, the national statistics institute, local wine institutes). For most supplier countries, the data is returned with the ranking for the main business partners annually, but every three months for the top players and every month for Italy, France and Spain. Once again for Italy, France and Spain, the 120 single wine categories present in the CN standard have been reprocessed and reaggregated in a completely new way, to offer different interpretive criteria, more relevant to the needs for data exploration and comparison: colour, class (PDO, PGI, varietal, common), type (still, sparkling, semi-sparkling, sweet, fortified), re-exports.
The volume data are expressed in litres and hectolitres, while value and average price are indexed to the currency of the individual countries, with the possibility of univocal cross conversion on an annual, three-monthly or monthly basis. For example, the Danish data will be viewable in Krone, but convertible into Euros, USD, Yuan, Yen, etc.
The system allows different entry keys *(figure 1)*: search by country, by product or comparative selection. The queries for accessing the data, range from the simplest (a supplier, a product, a client) to multiple ones, with the possibility of crossing several levels on a single dashboard: different suppliers, different products, different markets, in practice aggregating searches that would otherwise have to be done individually, on different databases, with uneven volume and value expressions (for example Italy-sparkling wine-export-Germany versus Australia-bottle-UK).
The system returns data in table form *(figure 2)*, with the possibility to make instant calculations (percentage variations, CAGR %, share %), to extract in Excel and produce dynamic automatic diagrams or, by selection, also downloadable in jpg format *(figure 3)*.

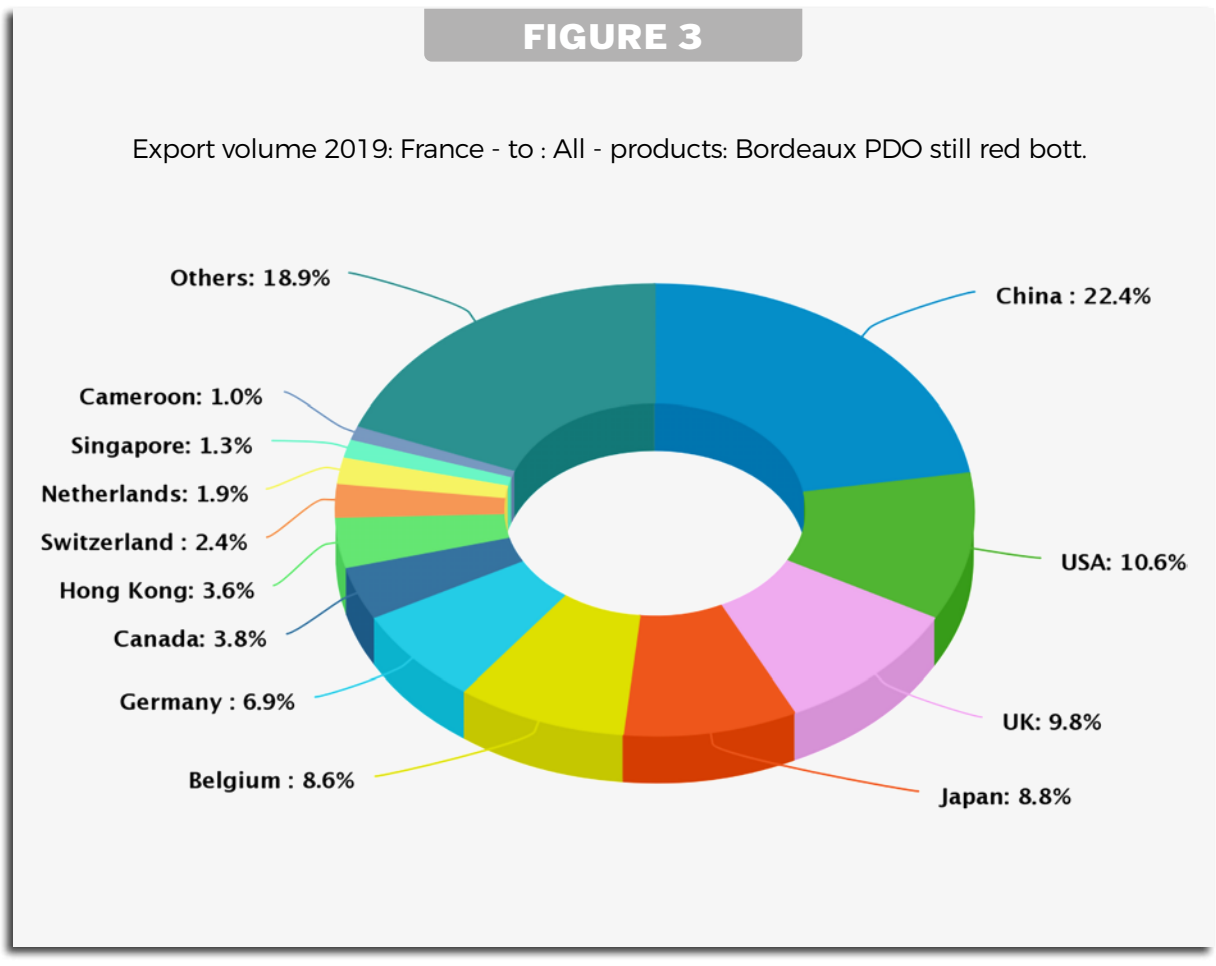


FIGURE 3

WINE WORLD MAGAZINE by IL CORRIERE VINICOLO
Supplement to Issue 37 of Il Corriere Vinicolo, 23rd November 2020
Press service of the Unione Italiana Vini – Association for the General Protection of the Economic Activities in the Wine Sector
Association of the Italian Periodical Press
EXECUTIVE EDITOR ERNESTO ABBONA
EDITOR-IN-CHIEF GIULIO SOMMA g.somma@uiv.it
MANAGING EDITOR CARLO FLAMINI c.flamini@uiv.it
NEWSROOM ANNA VOLONTERIO a.volonterio@uiv.it
COLLABORATORS Omar Bison, Giancarlo Montaldo, Clementina Palese, Fabio Ciarla
GRAPHICS ALESSANDRA BACIGALUPI, ALESSANDRA FARINA, DANIELE RIZZI
NEWSROOM CLERKS tel. +39 02 7222 281 corrierevinicolo@uiv.it
PROMOTION AND DEVELOPMENT LAURA LONGONI, tel. +39 02 72 22 28 41 l.longoni@uiv.it Advertising: grafica.editoria01@uiv.it
SUBSCRIPTIONS NOEMI RICCÒ, tel. +39 02 72 22 28 48 abbonamenti@corrierevinicolo.com
Unione Italiana Vini
is a member of the European project WINE in MODERATION CHOOSE | SHARE | CARE

DELLA TOFFOLA GROUP

WE NEVER STOP INNOVATING

We continue writing winemaking's future today. Our pressing system with AI software for continuous product inlet/outlet is setting new standards. Electro-pneumatic isobaric filling systems and next-generation labelling units do the rest. Innovation continues.

Continuous pressing center

Electro-pneumatic isobaric filling & new labelling

DELLA TOFFOLA · AVE · Zitalia · Priamo FOOD TECHNOLOGIES · omb · SIRIO ALIBERTI · GIMAR

www.dellatoffola.it

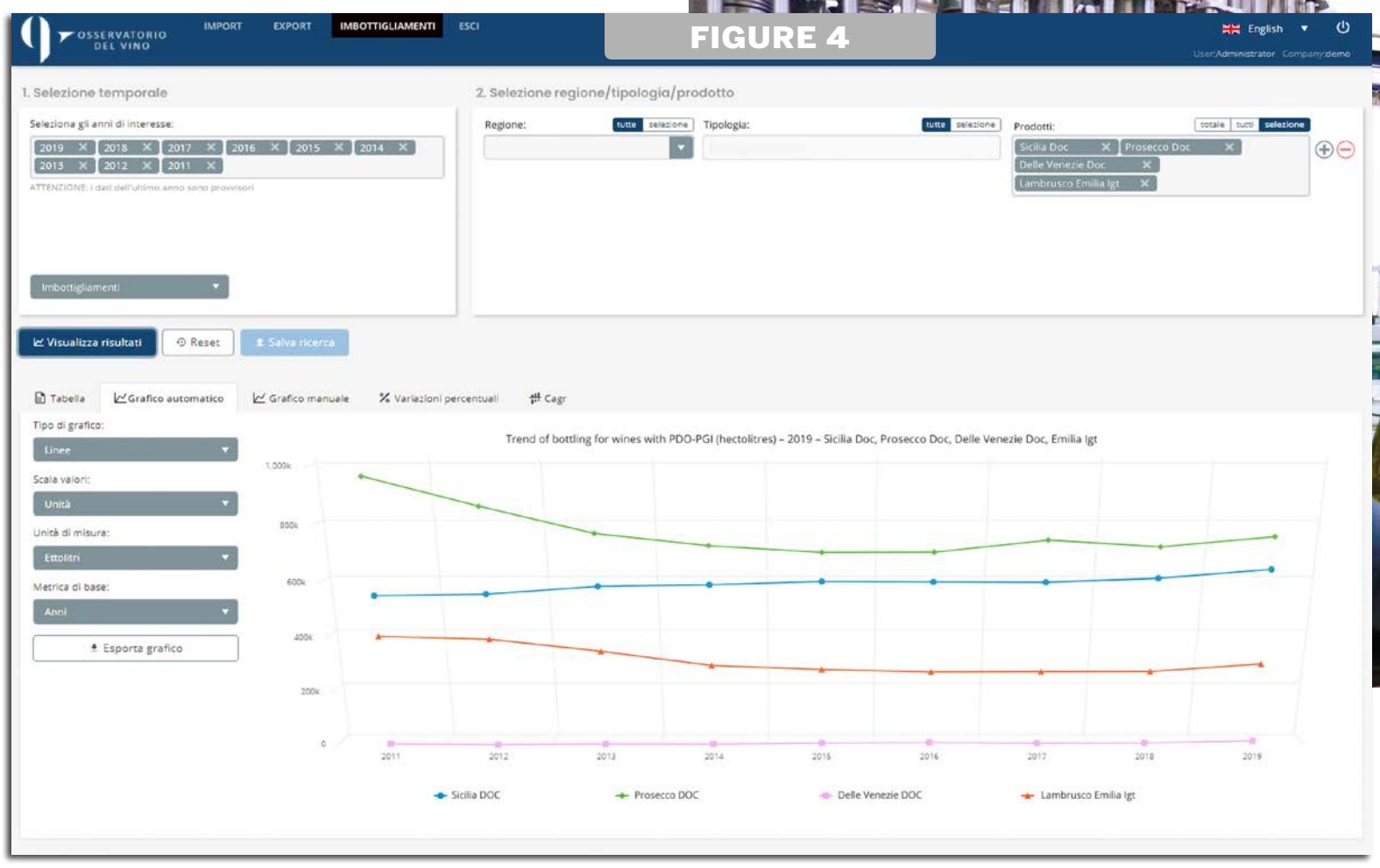


FIGURE 4

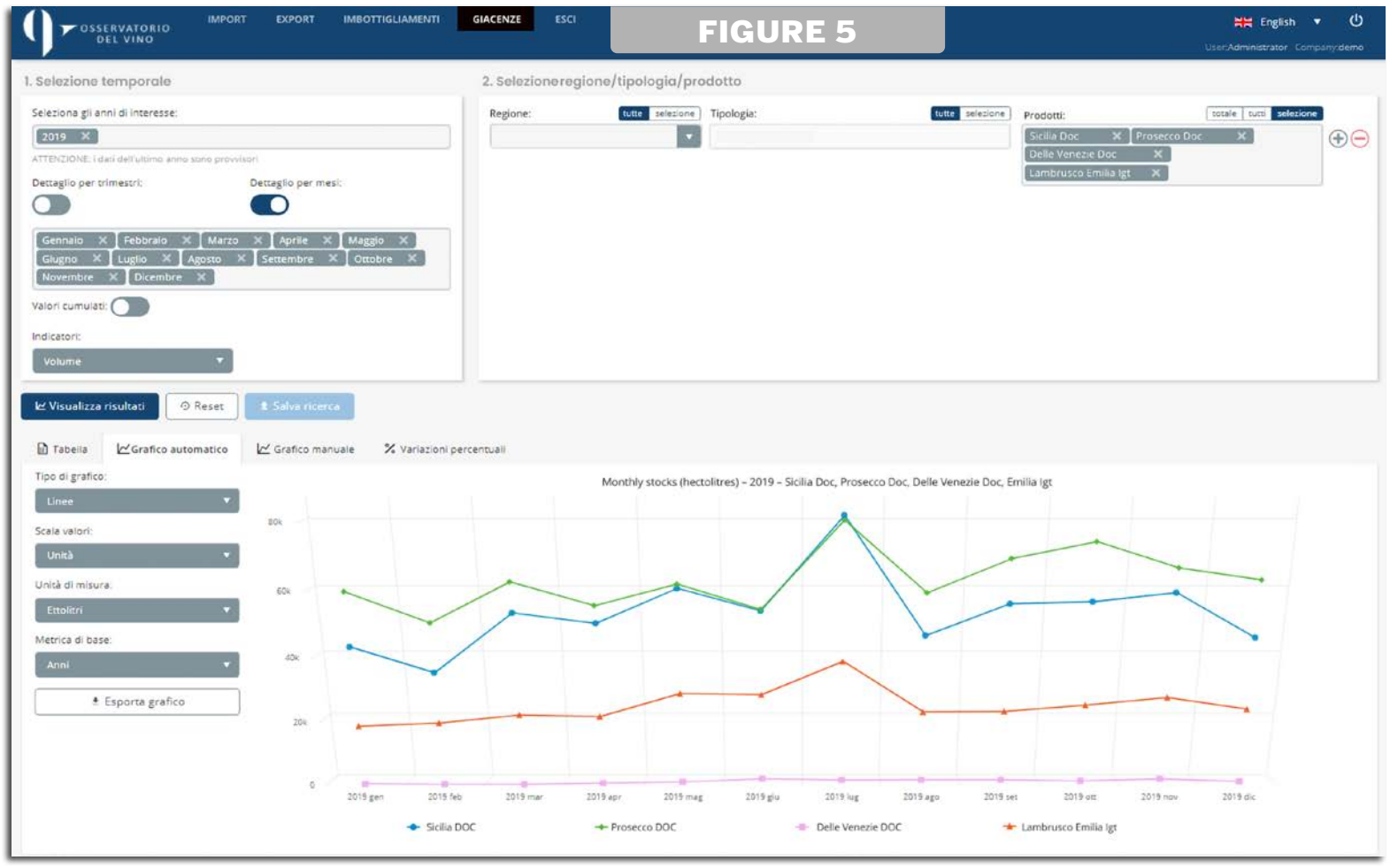


FIGURE 5

The Potential

The second platform aggregates three types of data that make up the production offer: the first – Production – proposes the potential and wine production of the main countries in the world and – for Italy – the disaggregate for regions and wine types (PDO-PGI, varietal, common).
The second platform aggregates the data of potential, DOC status claims, certification and bottling of the over 500 Italian designations of origin and geographical indications, starting from when the control system was fully operational, therefore in 2013 *(figure 4)*.
As for DB Import-Export, the system offers the possibility of queries by product type and territory, with the option of comparative selections.
The innovation in research and classification of data is that of being able to know absolute values and bottling of PDO-PGIs, subdivided by class of volume, by name (grape variety, territory, municipality or various combinations) and by year of recognition, in order to be able to have an overall picture of what performs better in terms of the relationship between bottled and DOC status claimed.
The Stocks database completes the platform, summarising the data released monthly by "Cantina Italia" (official database powered by Italian Ministry of Agriculture) since 2018, with the possibility of multiple queries on what is geared to Import-Export and Bottling: therefore, the development of stocks per product (aggregated or individual PDO-PGI), region, province, line and comparative graphs between the various products or territories, the calculation of the relationship between stocks and production *(figure 5)*.

Data reported in figure 4 and onwards are mere approximations

WHAT THE PROFESSIONALS SAY

Antonio Rallo, Sandro Sartor and Luca Giavi will take part in the official presentation of the Observatory at wine2wine, scheduled for 23 November at 2.00 pm. Like other consortia and wineries, during the past few weeks they have been granted access to the Beta version of the Import-Export section of the statistical database. Here are their impressions and perceptions on the future development of the platform, especially as regards the project of the database on sales of PDO-PGI wines.

photo ©Piloto

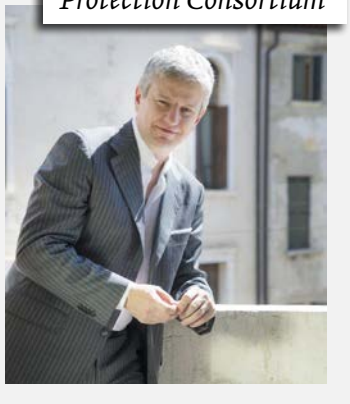
ANTONIO RALLO
Managing Director of Donnafugata and President of the Sicilia DOC Wine Protection Consortium

As the DOC Sicilia Consortium, we have set ourselves the goal of building a consolidated and precise statistical base during these years, which guarantees the correctness of the choices made, both on governing the designation and for the strategies implemented on markets. From the point of view of the potential, the entry into effect of the system for controlling production in 2013 and the recent implementation of the Cantina Italia reports, give us a precise picture of the state of Italian wines. But we are still inside the cellar. When they cross the winery gates, the data become less certain. If it is true that the picture is precise for Italian mass market retail, thanks to institutes such as Nielsen and IRI, we know almost nothing about HORECA, other than having just a "feeling." Now that the pandemic has hit this sector hard, it is vital to have a tool at your disposal that enables us to say with certainty if a designation is holding up, or suffering more or less than others, as well as being able to count on an Italy-aggregate to compare performances with not only a designation as a whole, but also at a winery level. The aim of the Unione Italiana Vini's Observatory is to bridge this gap and we are convinced of the worth of this venture, firstly as wineries and secondly as a Consortium of wineries. As for exports, it is strategic to equip businesses with a database that enables them to get more in-depth data, PDO by PDO and PGI by PGI, to bridge the gaps of the so-called international Combined Nomenclature, which for our country (with France and Spain, the main world exporter) still leaves a lot to be done in terms of precision, completeness and variety.

SANDRO SARTOR
Managing Director – Senior Vice President – Ruffino Group & Cbi Emea Region

Having certain data at your disposal, which is already aggregated and standardised, is a considerable step forward for companies, like ours, who work and live on the competitiveness of the various markets. The platform developed by the Unione Italiana Vini meets these strategic needs, offering the chance to carry out research that is both wide-reaching and in-depth at the same time, while saving time on data collection from different, patchy sources. Therefore, I believe that the creation of a database on designations and geographical indications, allowing us to measure sales on the Italian HORECA channel and to examine the data in further detail, for both volume and value of exports, will enable us to take a further step, to bridge two large gaps in the Italian wine system. The Chianti Classico Consortium, one of the firsts in Italy, has created its own tool to measure the performance of the designation, which allows us to know in real time the state of our wines, giving wineries the possibility to compare their own data with the aggregate one of the designation for each destination market and divided into the different wine types (vintage, *riserva, gran selezione*). But looking at a single designation, a single wine on its own is still a partial outlook. The Observatory's database, which when fully operational will allow us to compare different designations with a similar market positioning and price range in which they compete, will design the framework within which the individual products move. This will give us the possibility to understand a performance, whether positive or negative, in terms relative to a wider market context, an essential premise for an accurate analysis on which to base medium and long-term strategic decisions, whether of an individual winery or of a consortium as a whole.

LUCA GIAVI
General Director of the Prosecco DOC Protection Consortium

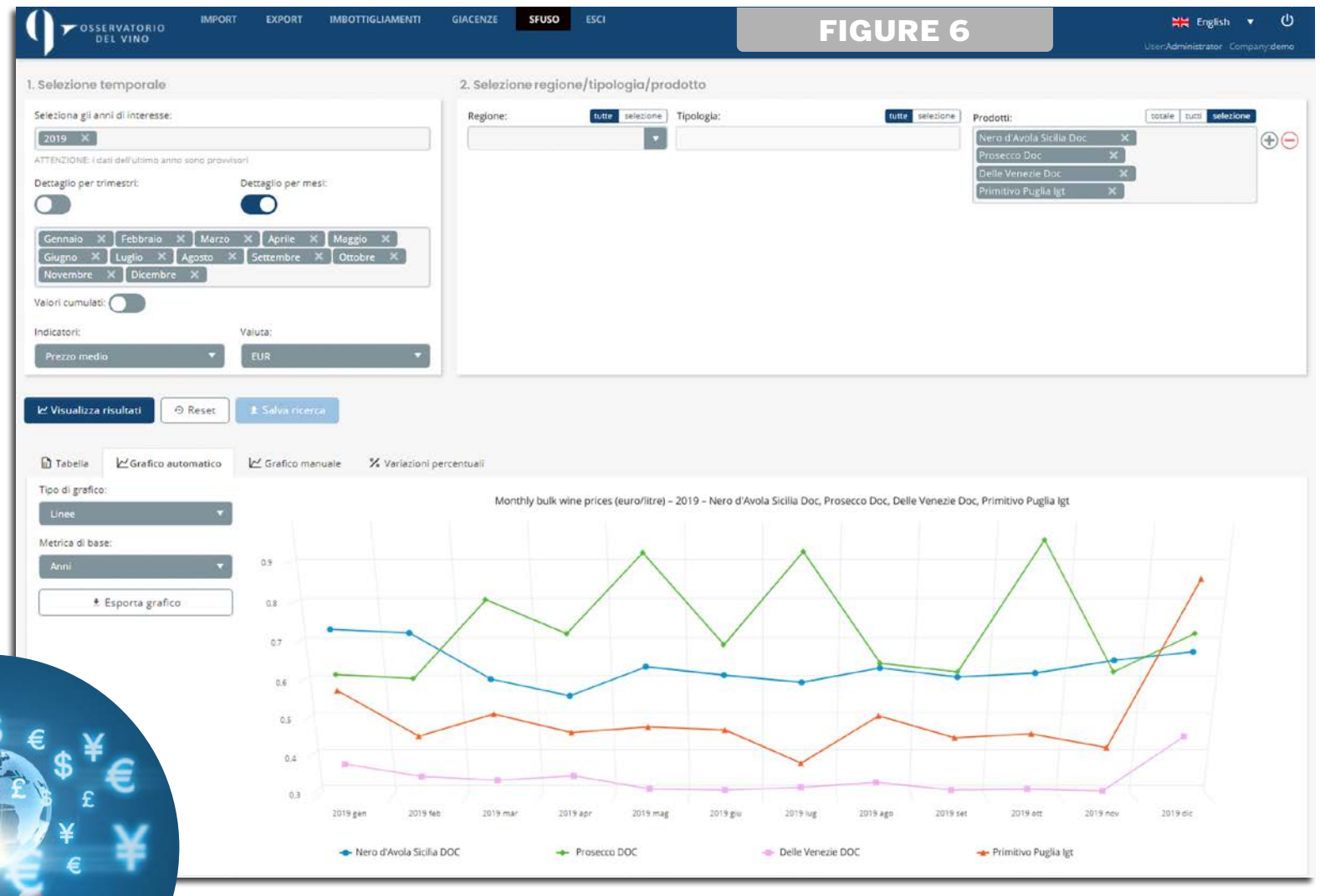


The availability and timeliness of the information on the market trend of the designation, thanks to the measurement of the sales flows directly from the management software of wineries, enables the Consortium to prepare a suitable management programme of the volumes available to release for consumption, according to tools made available by the rules in force, in order to follow market equilibrium. For wineries, the return of aggregate data enables them to monitor the state of their sales and to compare performances both on the Italian market (HORECA, not outlined yet) and in exports, where among other things the insertion of the Prosecco Designation in the world commerce database of the Unione Italiana Vini Observatory enables wider horizons, with the possibility to cross statistics both with similar designations (for example Champagne, Cava, etc.) and with other product types, such as still wines. Sharing data (whether of the winery or the consortium in an Italy aggregate) is a fundamental premise for the construction of a platform that meets the needs of the Italian winegrowing sector, with the final aim of a rock-hard certainty of the data and especially of its external communication, both factors that can be guaranteed only by those who really govern the designations.

The Bulk Wine Market

The Observatory is integrated with a platform dedicated to the Italian bulk wine market. It aggregates data released weekly on the "Market" pages of the *Corriere Vinicolo* since 2010, for a total of about 500 types of wine (PDO, PGI, varietal, common, must), monitored by networks of agents and intermediaries adhering to Med.&A. (National Association of Wine Brokers).

The prices of all products have been previously standardised; therefore, the database allows the extraction of time series of the individual products (weekly, monthly, yearly). For products listed on different stock markets and with different units of measure, the system offers the possibility to build comparative series, through special conversion options. For all the wines present in the catalogue, the system enables calculations of percentage change to be carried out on the previous weeks and on monthly and yearly averages. The search for products is twofold: by year of production (useful above all for long-aged wines) and by year of data collection, which enables a comparison of the prices of different vintages in the various years of dealings on the market *(figure 6)*.



Database Release

THE IMPORT-EXPORT PLATFORM IS ALREADY OPERATIONAL IN ALL ITS FUNCTIONS, ALSO IN ENGLISH. TO CONSULT THE DEMO FREE, SEND AN EMAIL TO

OSSERVATORIODELVINO@UIV.IT

THE RELEASE OF THE POTENTIAL AND BULK MARKET DATABASES IS SCHEDULED FOR THE END OF THE YEAR AND THE FIRST FEW MONTHS OF 2021

metaLUX

PVC FREE CAPSULES

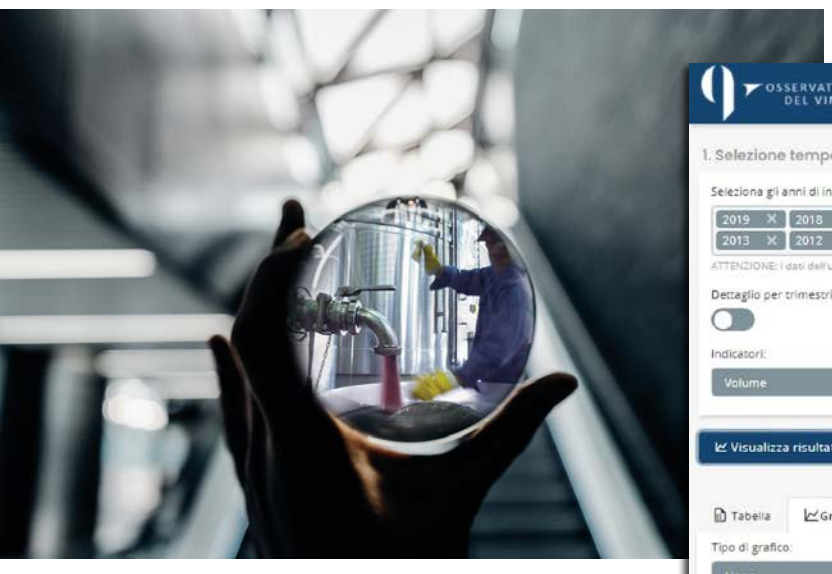
PVC-FREE capsules...Now, for all kind of capsules!

- **PVC-FREE** thermo-shrinking capsules
- **PVC-FREE** polylaminate capsules
- **PVC-FREE** champagne capsules

Successful removal of any vinylic resins

If you want **PVC-FREE** capsules, **Metalux** can satisfy your needs....
Enter the new era of **PVC-FREE** capsules!

+39 0421 331266, +30 22410 81767
info@metaluxsa.com, info@metaluxcapsule.it
web:**metaluxsa.com, metaluxcapsule.it**

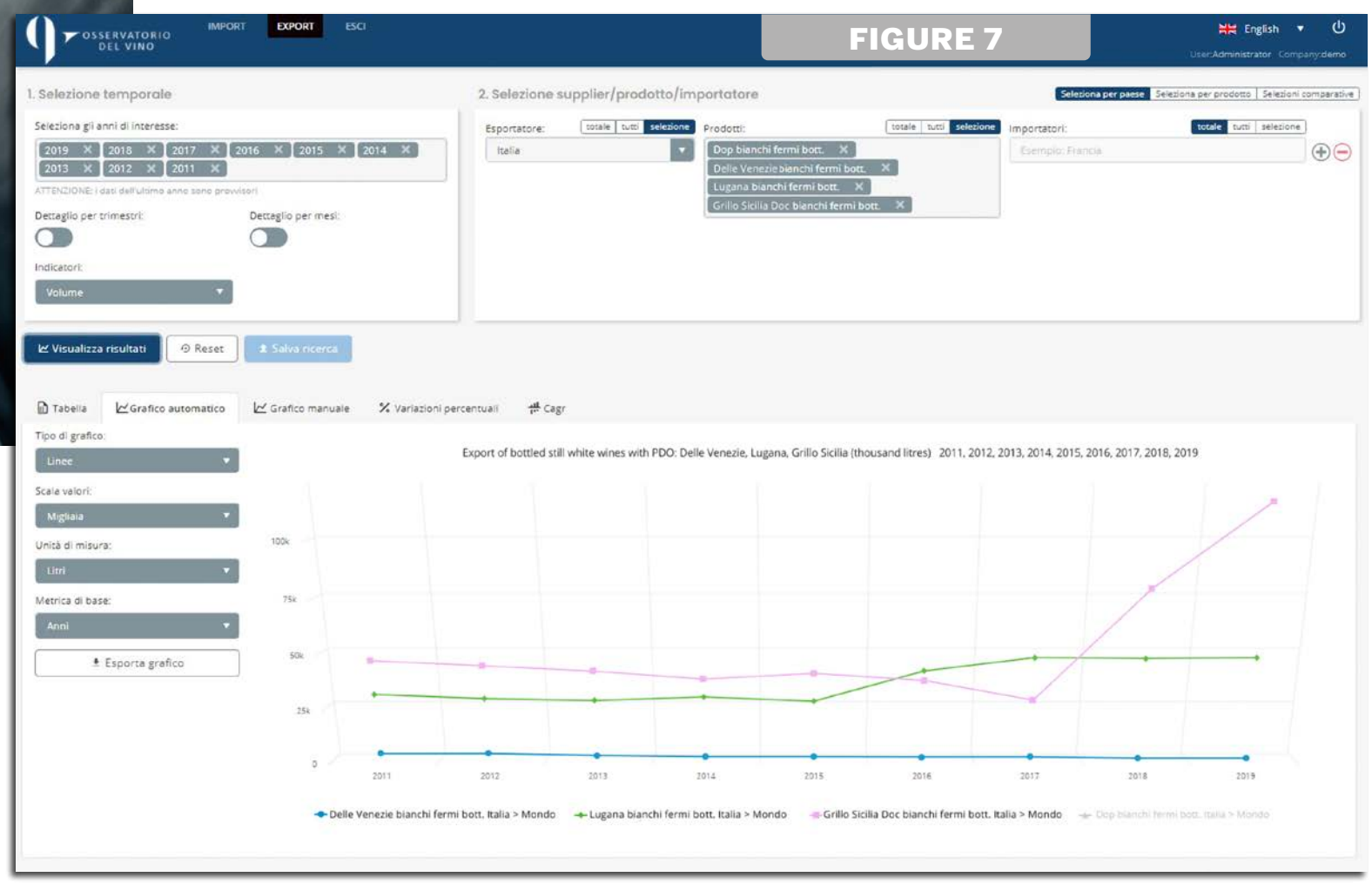


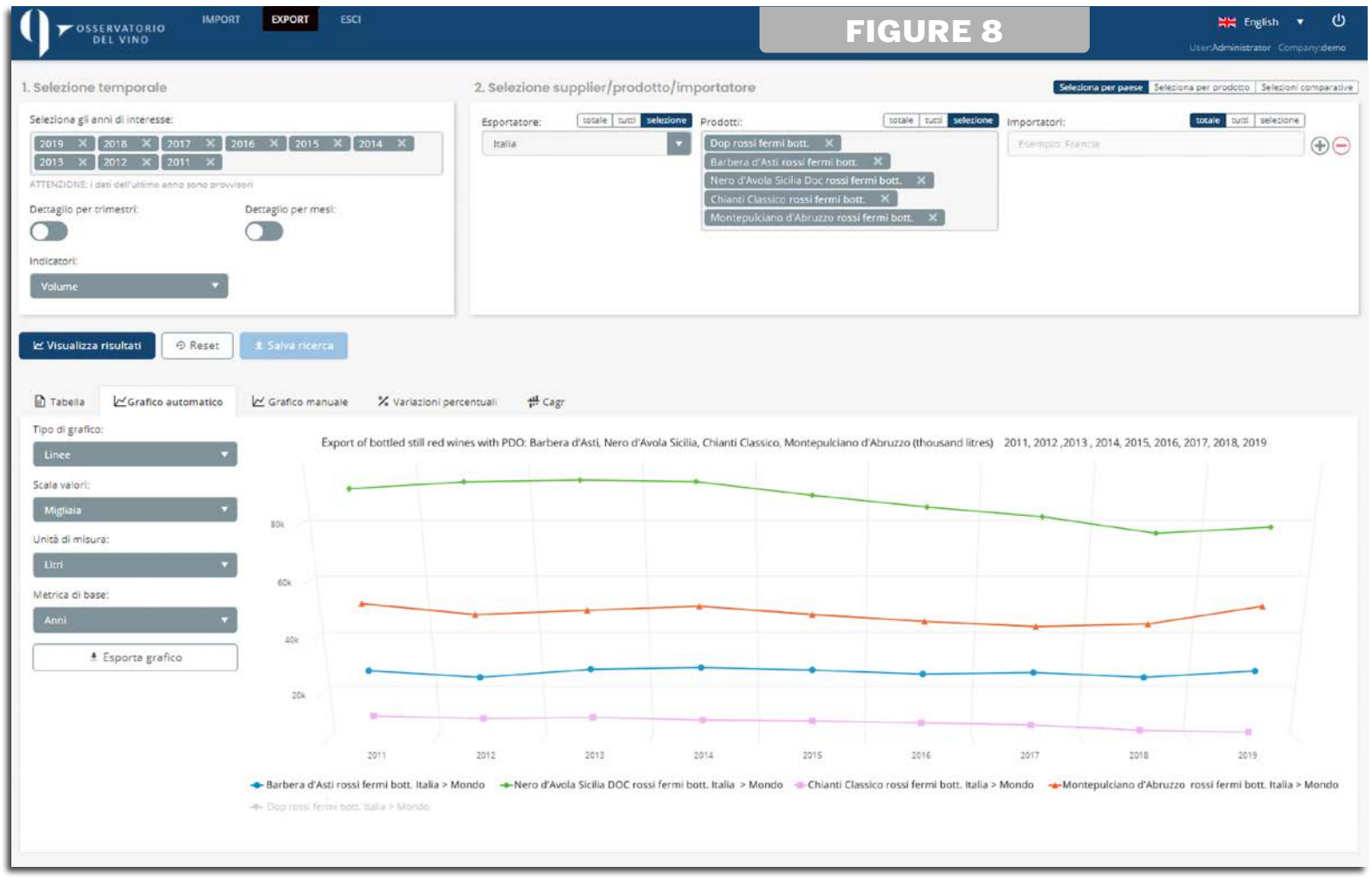
The Personalised Dashboard System

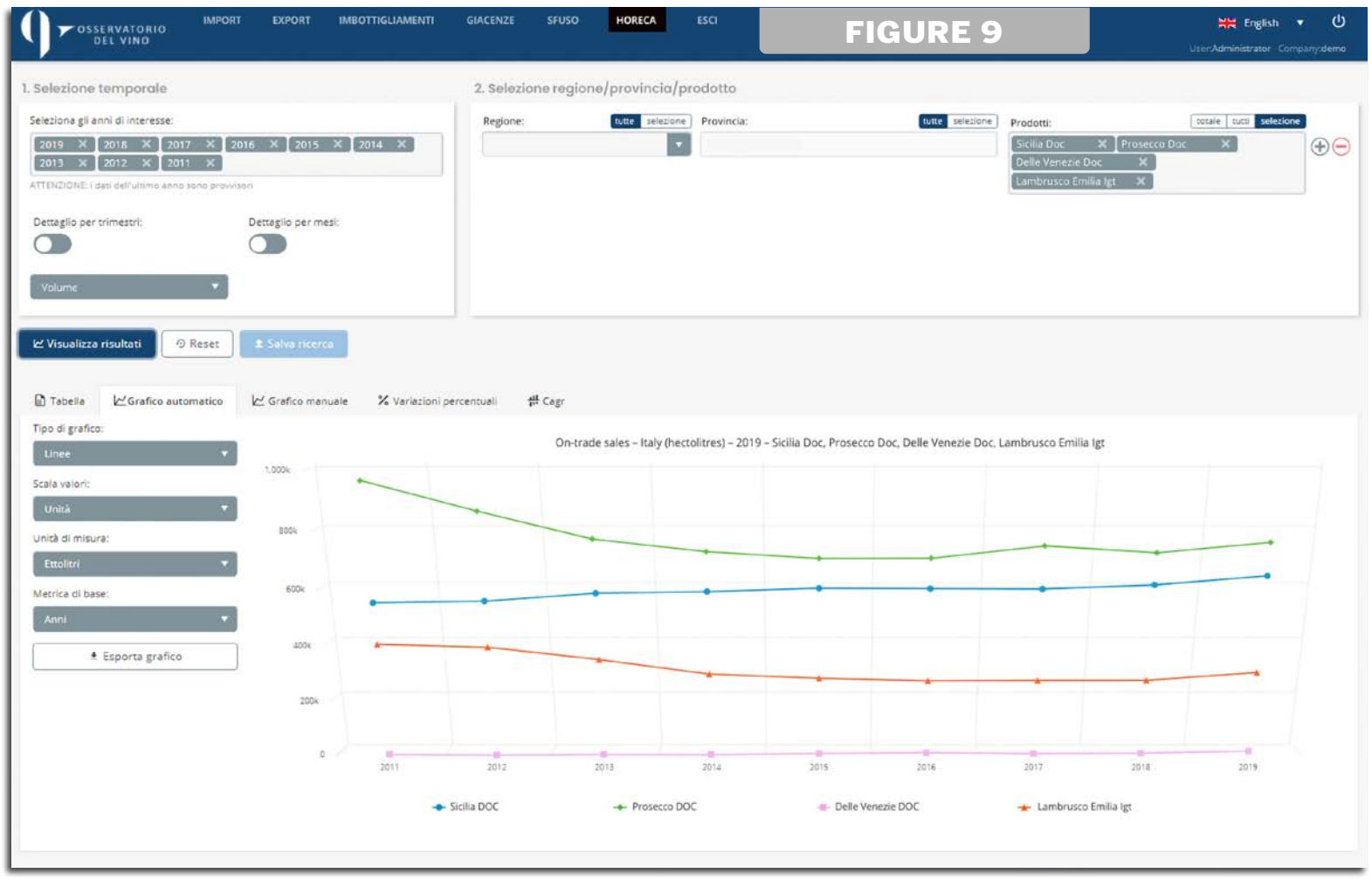
The system as a whole allows cross-sectional data collection of products and markets of interest. All wines and product categories present on the three platforms are codified and correlated, so that the searches on a database also show the correlated data of the other two. For example, a query on "export Prosecco" will recommend you view the data available for Prosecco on the bottling/stocks database as well as the bulk wine one. The user is thus given the possibility to build up personalised dashboards that are automatically updated to the latest available data.

The PDO-PGI Database

The fourth database is under construction and completes Unione Italiana Vini's Observatory. It is dedicated to data collection of sales of the main PDO and PGI wines. In partnership with the protection consortia, Unione Italiana Vini will collect data on aggregate sales of the companies associated on the Italian and foreign HORECA channel. Data on the exports of individual PDO-PGIs will merge within the Observatory's already operational Import-Export platform, thus filling a void in the Combined Nomenclature, which aggregates macro-typologies of wine today (for example, PDO Veneto whites, PDO Tuscan reds) *(figures 7 and 8)*.
A database of sales of the individual PDO-PGIs will be built for the HORECA channel, which will make up an aggregate snapshot of a fundamental but unmonitored segment. Wineries belonging to consortia will thus have the chance to monitor their performance in relation to the total of the reference PDO-PGIs and to compare their own and aggregate data with that of other designations present in the database *(figure 9)*.







THE PARTNERS OF THE OBSERVATORY

veronafiere vinitaly

The **institutional partner** of the Unione Italiana Vini's Observatory is **VERONAFIERE-VINITALY**, who has shared the general project and start-up

wine intelligence

The **operational partner** is **WINE INTELLIGENCE**, the British company specialising in market research on wine

ismea

The **statistical-economic partner** is **ISMEA**.

MED.&A.

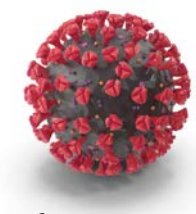
The **service provider** is **MED.&A.**, national association of wine agents and intermediaries, part of Unione Italiana Vini

maxidata ZUCCHETTI GROUP

The **technological partner** is **MAXIDATA**, software house of the Zucchetti group.

A Webinar Organised By Vinitaly And By The Italian-American Chamber Of Commerce In Chicago

Quality And Sustainability Of The Wine Production Chain For The U.S. Market After The Pandemic



William (Bill) Terlato illustrated the most recent changes of the market and consumption in the United States, obviously and heavily affected by Covid-19

"Quality and profit: these are the key elements never to be forgotten." A concise, "very American" and faultless message. And if the bearer of the message launched during a webinar organised by Vinitaly and by the Italian-American Chamber of Commerce in Chicago is none other than **William A. Terlato** - managing director of Terlato Wines International, a wine-making, trading and importing company, leader in the market of high-end wines in the United States - then we have to rely on his opinion.

Bill Terlato

Introduced by **Silvia Raffa**, managing director of the Italian American Chamber of Commerce in Chicago, and interviewed by **Amy Ezrin**, wine expert, importer and consultant in the wine sector, William (Bill) Terlato has illustrated the most recent changes of market and consumption in the United States, obviously and heavily affected by Covid-19.

"The scenario has changed," he admitted. "And, if before Covid-19, 20 percent of our wine business was in the hands of restaurants, whereas retail represented 8 percent, today the percentages have inverted."

Between April and May, according to Mr. Terlato, sales grew in retail shops, by 60percent and by 58 percent respectively. Bad news, unfortunately, for restaurants.

"Regretfully, I think that 25-30 percent of them will not open again," he said. "After all, the procedures are complex: take people's temperature, purify air, maintain distancing... It is complicated, some restaurants will not reopen."

In any case, according to Mr. Terlato, "Consumers will not stop drinking wine, even if they will readdress their purchases, taking into account that Covid-19 has accelerated the awareness to wide-ranging issues, such as the attention to climate changes, sustainability and biodiversity. These were already hot topics, but in this phase, attention has increased."

Interest In A Full-Scope Sustainability

With regard to sustainability, in particular, Mr. Terlato has a clear view.

"We have to consider that our interlocutor will not only be interested in environmental sustainability related to grape growing and the way wine is produced," he said. "But also to its packaging, transportation and logistics on the whole."

To the numerous participants of the webinar, Mr. Terlato pointed out two aspects that favour Italian winemakers in relation to high-quality production. On one hand, the attention to food and wine pairing - thus to cooking, such as those of the Italian regions, taking into account that "For American people, Italian food is a real comfort food" - and, on the other hand, the force of story-telling.

"American consumers are particularly interested in receiving information concerning a wine production area, a vineyard, a winemaker, wine-growing, grape harvest and winemaking phases," he said. "And the differences related to the varieties of wines."

"In the segment of high-quality wines, with consumer prices above 25 US dollar," Mr. Terlato explained, "There is a strong competition, but however, there is no lack of opportunities, if you can understand the consumer's needs."

High-quality is required and sought after and, in some cases, the purchase bar has been set higher. "Those who were ready to pay even 100 dollar for a high-quality wine bottle at a restaurant," Mr. Terlato stressed. "Will try to improve the quality of their drinking at home and will be ready to pay 75 dollar to buy a wine at a shop."

An essential and deeply American suggestion, which is linked with profit: "Never lower the price. If you are ready to reduce it by 10 percent, they will probably ask you to decrease it by 30 percent, therefore you should avoid the so-called discount operations."

These are extremely useful indications for winemakers of Italian wines.

"In order to provide contacts and opportunities from the experience of Vinitaly to know the dynamics of a marketplace, such as the American one, which is deeply changing and which, despite the difficulties of the current situation, represents an opportunity for Italian enterprises," said **Giovanni Mantovani**, general manager of Veronafiere.

140
1880-2020

Together for 140 years

Anniversaries offer the chance to take stock of one's work, even during challenging times.

From our very first innovations in 1880 up to today, we at Bertolaso have brought ingenuity and reliability to bottling technologies to support the growth of producers throughout the world. And we have done it with dedication, skill, trust and collaboration.

Looking ahead, we see these same values.

Thanks to all of those who have chosen us as partners for their bottling solutions. Our story is also thanks to them.

Discover more on bertolaso.com

bertolaso

THE TRENDS OF THE ITALIAN MARKET IN A ROUND TABLE AT WINE2WINE 2020

WINE AND MASS MARKET RETAIL DISTRIBUTION IN THE YEAR OF COVID-19

Shelf (and Online) Sales Are Taking Off, But What About 2021?

At the beginning of November, wine sales in the mass retail channel at +6.9 percent in terms of value and at 5.3 percent in volumes, with an upsurge from the end of October due to fears of a new lockdown. However, in future, we will come back to normal trends of growth. Here are the scenario analyses by Virgilio Romano (IRI) and the performances of some big groups in the Italian mass-market retail distribution: Coop, Selex and Conad. Expectations and proposals of the production world in the words of Enrico Gobino (Mondodelvino) and Mirko Baggio (Villa Sandi).

by **OMAR BISON**

Also in Italy, according to a trend that was common to all world markets hit by the pandemic, the year 2020 saw a remarkable growth of wine sales in the mass-market retail channel. To show a picture of the Italian case study, experts, winemakers and representatives of big groups of the large-scale retail distribution met during the round table "Wine and Mass Retail Distribution facing the Change," held at wine2wine 2020 – the traditional autumn exhibition of Veronafiere, launching its seventh edition and taking place in a completely digital version from 21 to 24 November. In the first 45 weeks of the year, wine sales in the mass retail distribution channel grew by +6.9 percent in value terms and by +5.3 percent in volumes, with irregular trends, related to the periods of closures and mobility restrictions, which led to a recent upsurge between the end of October and 8 November, due to fears of a new lockdown.

If on 25 October *(see chart)* the increases stood at +5.7 percent with regard to values and at +4.4 percent in volume terms, the new significant upswing of Covid cases and the fear of new closures have been enough to increase, in few days, the volumes of wine sales in the mass retail channel by 0.9 percent for values accounting for +1.2 percent on a yearly basis.

The figures of a trend that marked the lockdown weeks in particular have been illustrated and commented by **Virgilio Romano**, Business Insight Director at IRI (world leader in market information for Large-Scale Consumption, Retail and Shopper).

"The odd situation due to the health crisis in the months of March, April and May had a quite significant impact on the total data of the first ten months of 2020," Mr. Romano explained. "Even if, when we came back to a substantially normal situation after the lockdown between June and September, the purchase and consumption data and trends returned to the historical trends before the pandemic".

An evaluation that "should reassure us, because it means that consumers are inclined and ready to return to a situation of normalcy," the researcher at IRI said. "And thus the effects on the Mass Market Retail related to this particular period will be positive, but in the short term. This is highlighted by the data of the month of October showing growing trends compared with the same period of last year, exactly when the Covid cases have started to spread again".

As regards 2020, "We registered some peaks among the highest and the lowest ever recorded in the last six years," Mr. Romano pointed out. "In particular, we refer to Spumanti and, most of all, to Prosecco, or to the 1.5-litre sizes, which had lost much for a long time, but are currently showing rates of growth never seen before. We should not forget that even superettes and minimarkets sales have never increased so much as in the month of April. In general, sales have never grown so much with such a fall of promotional pressure. All this proves that we experienced such a particular year that it is difficult to think that we will be able to repeat it in 2021".

Virgilio Romano, business insight director at IRI

In detail, if we analyse the figures of the chart *(below)*, we notice how in general Spumanti had a very bad month of April due to Covid and a toned-down Easter, losing the drive of the second most important festivity after Christmas and reporting the worst monthly trend over the last six years.

"But from May, Spumanti and Prosecco have started to sell rapidly again," Mr. Romano underlined. "As much as they did in the months before the pandemic, growing more than still wines. This is further confirmation that Italians are ready to recover and to behave as before the virus".

If we look at the other categories, there is an odd trend of DOC (Controlled Designation of Origin), DOCG (Controlled and Guaranteed Designation of Origin), IGT (Regional Geographic Indication) and table wines, where the rankings of March and April and the yearly total have inverted.

"In March and April we saw table wines growing in first place and then IGT and DOC wines, whereas on a yearly total (always at the end of October), DOC wines are in top position," he said. "Followed by IGT and then by table wines. It is a confirmation of what we have been saying for a long time. DOC and DOCG wines are growing in proportion to the growth of investment in assortments, because consumers are searching for them, having a perception of quality, in relation to an interesting price. This trend in the period March-April came to a halt, because in that period it was no longer possible to go shopping where you wanted and you had to do it in a hurry, favouring the category of table wines available mainly in superettes and minimarkets, where assortments are smaller and prices are good. But when we came back to normal, and this will probably be the future, DOC wines have started to go up again and more rapidly than table wines".

And what can we expect in 2021?

"As soon as the extraordinary period comes to an end, we will return to the historical trends with two substantial differenc-

WINE SALES IN LARGE-SCALE DISTRIBUTION IN THE FIRST 10 MONTHS OF 2020

Area	PRODUCT	Numbers as of 10/25/2020						March-April 2020					
		Vol. (hL.)	Vol. % Ch. in hL. vs 2019*	Value (,000 Euros)	Value % Ch. (in ,000 Euros) vs 2019**	Avg. price per Lt.	Avg. % price per Lt. vs 2019***	Vol. (hL.)	Vol. % Ch. in hL. vs 2019*	Value (,000 Euros)	Value % Ch. (in ,000 Euros) vs 2019**	Avg. price per Lt.	Avg. % price per Lt. vs 2019***
ITALY'S HYPERMARKETS, SUPERMARKETS AND DISCOUNT STORES (7456)	**Total Wine**	**5,647,264**	**4.4**	**1,708,564**	**5.7**	**3.0**	**1.3**	**1,577,513**	**12.8**	**471,242**	**12.0**	**3.0**	**-0.7**
	Doc/Docg Wine	1,945,726	5.2	898,259	6.4	4.6	1.2	537,615	9.9	244,405	9.7	4.5	-0.2
	Igt Wine	1,474,666	4.7	457,891	7.1	3.1	2.3	402,956	13.1	125,456	15.0	3.1	1.7
	Table Wine	2,195,526	3.9	338,146	3.0	1.5	-0.8	628,975	16.1	97,787	15.8	1.6	-0.2
	Foreign Wine	31,346	-20.1	14,268	-11.7	4.6	10.5	7,967	-27.5	3,594	-18.8	4.5	12.0
	Champagne+Spumante	590,581	10.1	386,014	10.5	6.5	0.3	138,343	-5.3	88,228	-4.2	6.4	1.2
	Prosecco	285,203	21.4	190,687	18.1	6.7	-2.7	68,784	7.6	46,455	10.1	6.8	2.4

** Volume percentage change in Hectolitres compared to the same period in 2019 ** Value percentage change in ,000 Euros compared to the same period in 2019 *** Price percentage change per Litre compared to the same period in 2019*

es," Mr. Romano noted. "The year 2021 will be compared with a very well-performing 2020 and therefore, there will be a high figure, with which it will be difficult to make a comparison. In addition, there is the phenomenon of purchases from home and online. For a long time, online retail has already increased by 30-40 percent every year, but with the pandemic outbreak, online purchases quintuplicated. There has been a slight slowdown after the period of March-April, but online retail remains at high levels and we are convinced that a part of the people that experienced this purchasing method will go on using it. Therefore, a part of the sales will go from the physical to the virtual retail, because people appreciate its convenience and service."

On the other hand, in terms of macro trend, what will remain of the phenomena we are experiencing? What will happen, for example, to a small minimarket in a district, which has been growing a lot in this period?

And where will it be worth investing on the large size, with the 1.5-litre size in constant decline for years and a bag in box increasing in the last two years, but still weighing too little in terms of turnover?

"The companies should wonder if in these macro trends there is something destined to strengthen, developing to meet the new and different needs of consumers," Mr. Romano commented. "We have to understand if there is something concrete capable of helping us in our growth, going beyond the strong fluctuations of a year that maybe we will not experience again."

Remarkable Increases For The Mass Market Retail Groups

The general trend of growth for wine sales in terms of value and volumes is confirmed by the speeches of the representatives of the Mass Market Retail Distribution taking part in the debate.

"Today at Coop, if we sum up all ranges, the trend of wines until October is positive compared with the same period in 2019," said **Francesco Scarcelli**, head of the wines, beers and alcoholic drinks department at Coop Italia. "With regard to Spumanti, we even stand at +8 percent. In the lockdown period, it was Prosecco that supported the whole category. Today, Prosecco keeps on selling very well, because we are at +16 percent, but also the classical-method Italian Spumanti have started again to grow attaining +11 percent. On the contrary, sweet Spumanti are suffering, standing at -10 percent, especially due to the Easter decrease, which could no longer be recovered. Champagne regains strength if we consider that in the lockdown months, it even reached -50 percent and now going up until October, it is at -5 percent. If we consider the rest of the wines, equally divided between white and red wines, we stand at + 6 percent. Rosé wines are dropping (-3 percent), whereas table wines maintain a positive outcome (+3 percent), even if decreased compared with the double-digit growth obtained during the lockdown, when people looked for an everyday wine that they could buy quickly. Today, the line of IGT wines is achieving +6 percent, with the categories of white (+6.5 percent), red (+5.5 percent) and rosé (-3 percent) wines".

Francesco Scarcelli, head of the wines, beers and alcoholic drinks department at Coop Italia

"Also for Selex, DOC and DOCG wines have more than doubled," **Fabio Sordi**, sales director of the Group, said. "As it has already occurred for many years, compared with table wines and, in general, our wine turnover has lapped the growth of the market. Dry Spumanti are rising, even if not all varieties for Spumanti are equally successful, whereas sweet bubbly wines are in difficulty".

A double-digit upturn for the whole wine sector in the current year was recorded by Conad "with a better trend than the one registered in the market," said **Alessandra Corsi**, sales marketing and private-label manager at Conad of the Group. "To drive the growth in our sales outlets are all high-quality wines (IGP, DOC, DOCG), attaining double-digit increases, whereas we see a slight decrease in the segment of dessert wines. The upswing of high-quality wines has been an important event for several years, further enhanced during 2020, due the reduced opportunity of out-of-home consumption. Even the phenomenon of 'drinking less sweet beverages' has been in progress for years, not only for the category of wines and spumanti, but also for the whole sector of carbonated and fruit-based drinks. The Covid period has substantially improved the performances of the category of DOC wines, which were already in excellent condition in the mass retail distribution channel, whereas table wines contributed to this year's positive results in a significant way, interrupting the decrease in consumption".

Important figures are highlighted in the segment of bubbly wines.

"As far as the classic-method Spumanti, this year we are recording a growth of over 20 points at Conad," Ms. Corsi continued. "This increase is slightly higher than that of Prosecco, which is however very interesting and always a double-digit rise. Through their purchases, consumers have been showing appreciation for both dry Charmat and classic-method sparkling wines. An interesting phenomenon to be observed: spumanti made with international varietals, which were often used for Italian Spumanti in the past (e.g. Pinot and Chardonnay), are slowing down in favour of new varietals that have a higher Italian character and regional connotation. The sparkling-process know-how is spreading in Italy, where technological modernisation in the cellar matches with product innovation, in order to offer the consumer an innovative bubbly wine, capable of recalling the local character of the terroir of origin. We can find some examples of this new trend in the transformation as spumanti of three famous wines from the region Campania, Greco, Fiano and Rosé di Aglianico and also in small projects like the Novebolle Romagna DOC Spumante."

Here below: Fabio Sordi, sales director at Selex Group

Further down: Alessandra Corsi, sales marketing and private-label manager at Conad

Even our private-label wines have followed the positive trend of the market.

"For our private-label wines, we expect a year-end closing with a double-digit growth compared with 2019, with sales increases in terms of value and volumes," **Fabio Sordi** of **Selex** said. "It is also interesting to observe a constant rise in the sales of medium/high-end products with prices above 6 euro. In our opinion, this is a sign of the loyalty of our customers and of our good work on the quality/price ratio".

At Conad, Alessandra Corsi speaks of extraordinary performances of private-label wines, "which are registering a growth that is significantly higher than the rest of the market. However, we suffered in the segment of table wines, where the increased promotional intensity of famous brands was stronger. Essentially, I would like to stress that the phenomenon of 'drinking less but well' is constantly expanding and accelerated in the current year, bringing forth important increases with regard to wines also with prices above 8 euro. Therefore, we will continue in the improvement process of assortments already started several years ago."

A more detailed analysis was provided by COOP, which has two private-label lines: "Assieme", with everyday-consumption labels, and "Fior Fiore", created to enhance the excellence of DOC wines and their terroirs of origin.

"With 450,000 bottles for twenty items of important wine-growing and wine-making companies, 'Fior Fiore' line is dedicated to specific projects in cooperation with Ais," Mr. Scarcelli said. "We are recording positive trends, even higher than the average of their wine category. Being particularly influenced by the promotional activities, the 'Assieme' line is reporting a moderate reduction. We can say that that everyday wine is slightly decreasing, whereas the medium/high-quality, selected wine is selling well", to such an extent as to change the promotion policy in the sales outlets and the set-up of shelves and corners.

"We are qualifying high-end wines," he said. "Without forgetting more affordable and everyday wine categories, both in terms of product and of sales outlet. We have organised a more understandable store set-up with a more immediate impact in relation to the local terroirs of origin, the typologies and the assortments. Moreover, we have distanced table wines, available also in 'brik' and 'bag in box,' from IGT wines, displaying them almost as a sort of *cross category* of the gastronomy world. Even more, we consider it necessary to guarantee the consumers the presence of professional figures to facilitate their purchases of high-value wines and make wine-food pairing recommendations. For this reason, we are training professional figures that are different from promoters and we often have sommeliers attending events within our sales outlets. If promotional activity is fair, it can drive consumption awareness, but if it is excessive, it only creates loyalty to the event and the related offer, but not to the product."

THE WINERIES' OPINION

Over here: Enrico Gobino, marketing manager at Mondodelvino Group

Bottom right: Mirko Baggio, sales manager for the Italian Retail Distribution of Villa Sandi

"From this pandemic we have learned that we can face market turbulence with an appropriate production-chain policy that protects the interests of all links in the chain," **Enrico Gobino**, marketing manager of Mondodelvino Group, said summarising a feeling that is common in the wine production world. "We also understood that all companies, in proportion to the market of reference, have to follow well-balanced distribution models, capable of holding out, as they are based on different channels".

"As far as we are concerned, and I think this is a common tendency," Mr. Gobino stressed. "During the lockdown period, the Mass Market Retail Distribution compensated, even if not completely, the losses of the on-trade channel. Globally, we did not have any turnover reduction as a group, and, generally speaking, we can say that mobility limitations during the lockdown created a consumption concentration, which would have normally been spread over other channels. Consumers preferred items with favourable prices and in bigger sizes, such as for example bag in box. In addition, these formats also have features of high environmental sustainability, an aspect that the consumers are beginning to consider."

Multi-channel distribution for winemakers and a new awareness of the Mass Market Retailers towards quality. These are the points analysed also by **Mirko Baggio**, sales manager for the Italian Retail Distribution of Villa Sandi.

"The challenge of the future for wine-growing and wine-making companies will be to change their way of approaching the market," Mr. Baggio said. "By diversifying the channels and the proposal to guarantee a balance. To reach the market by offering different lines also with similar products: more dedicated terroirs, more DOC wines, more brands and more lines of the same product typology".

Also because maybe something is changing in the Mass Retail Channel buyers' approach.

"I think that the recent lockdown made the Mass Retailers understand that they should buy not only conventional promotional wines," he said. "But a balanced assortment that also takes quality into more consideration. We hope that this will be a long-lasting tendency and that attention will be focused more on quality and less on prices. We will rely a lot on the novelty of Prosecco rosé, as we are convinced that this type of spumante will be successful, which today covers less than 3 percent of the market. It will become a full-meal product that can be more easily matched with food, as Pinot noir gives more structure and persistence to wines."

ITALY. CLOSING BALANCE OF THE 2020 VINTAGE

EXCELLENT AND (NOT) ABUNDANT

Excellent grape quality, production down 2 percent compared to 2019 and holding its value. This is the summary of the final assessment of the vintage outlined by Unione Italiana Vini, Assoenologi and ISMEA. A favourable basis for facing market challenges. A detailed analysis of the vintage trend.

The quality and quantity trends of the harvest (in the closing balance outlined by Unione Italiana Vini, Assoenologi and ISMEA at the end of almost all of the harvest work) confirm excellent grapes combined with a decrease in volume. A quality defined as "excellent" in all the vineyard areas of the country is offset by another aspect which is seen by the world of production as "positive," given the difficult market situation: a further decline in quantity on last year, compared to the original forecast, bringing the estimate of total wine and must production to 46.6 million hectolitres, -2 percent compared to 47.5 million hectolitres in 2019, placing the current harvest below the average of the last five years.

"Nature has managed to counterbalance an extremely difficult year with a very positive (in some cases unforgettable) harvest," **Ernesto Abbona**, president of Unione Italiana Vini, commented.

Mr. Abbona said that strong action in support of the market is necessary from the institutions that have to manage the pandemic with caution, without slowing down work on international promotion.

This excellent grape quality will be a strategic asset for the future, commented **Riccardo Cotarella**, president of Assoenologi and according to whom "The 2020 vintage has given us very high-quality grapes also thanks to a slight decrease in quantity. After all, it is well-known that we have always considered the quality intrinsic to our wines to be the only element that can give value to Italian wine, in addition to our immense biodiversity," a quality that "will be the added value of a vintage that has been lived through with a sense of concern that has gripped us for months, due to aspects linked to the pandemic."

Although the sector "is facing difficulties deriving from the pandemic with great energy," **Raffaele Borriello**, General Director of ISMEA, said, "There are more and more companies that have set up a process to diversify distribution channels, managing to place products even during a time when the HORECA channel was totally blocked, also thanks to a strong acceleration in the digitalisation of the sector."

ITALIAN PRODUCTION OF WINE AND MUST (thousands of hectoliters)

REGION	2019	2020*	% variation 2019/2020*
Piedmont	2,603	2,681	3%
Valle d'Aosta	17	19	10%
Lombardy	1,301	1,431	10%
Trentino-S.T.	1,312	1,378	5%
Veneto	10,950	11,059	1%
Friuli V.G.	1,785	1,624	-9%
Liguria	40	44	10%
Emilia-Romagna	7,250	7,975	10%
Tuscany	2,625	2,074	-21%
Umbria	426	383	-10%
Marches	816	857	5%
Lazio	800	720	-10%
Abruzzo	3,184	3,375	6%
Molise	227	233	2%
Campania	778	778	0%
Apulia	8,947	8,231	-8%
Basilicata	87	83	-5%
Calabria	110	110	0%
Sicily	3,911	3,129	-20%
Sardinia	363	436	20%
TOTAL	47,533	46,620	-2%

Source: Agea Production statements for 2019 and estimates for 2020 by Assoenologi, Ismea, Unione Italiana Vini, October 25, 2020*

Climate Trend and Grape Harvest

In 2020, rainfall was well-distributed in spring and summer and temperatures were normal, except for some peaks in the summer which affected the quantity of the harvest in some regions. This climate trend basically favoured good ripening, both for grape health and quality, with excellent concentration of aromatic substances in white wines and good levels of alcohol and notable colour intensity in red wines.

Not all regions, however, report a decrease in production. In particular, it was the central and southern Italian regions that were most affected by the climate trend and where the most marked decreases were recorded, with 21 percent lower in Tuscany and 20 percent lower in Sicily. Veneto retains the record, thanks to new vineyards, and the whole of the north recorded average production compared to the past five years.

The 2020 vintage took place with the same timing as a traditional year and is now coming to an end, with late harvest grapes still in the vineyard.

The first region to pick grape bunches was Sicily at the end of July, followed (as per tradition) by Puglia, Lombardy and Franciacorta in the first ten days of September. Work has terminated in most Italian regions, much of the harvest in Italy was concentrated in the last ten days of September and the first week of October. In some areas the harvest is still in progress and, thanks to the rain in this period, further weight losses have been avoided in these cases, with grapes still of excellent quality.

An Account of Quality and Quantity

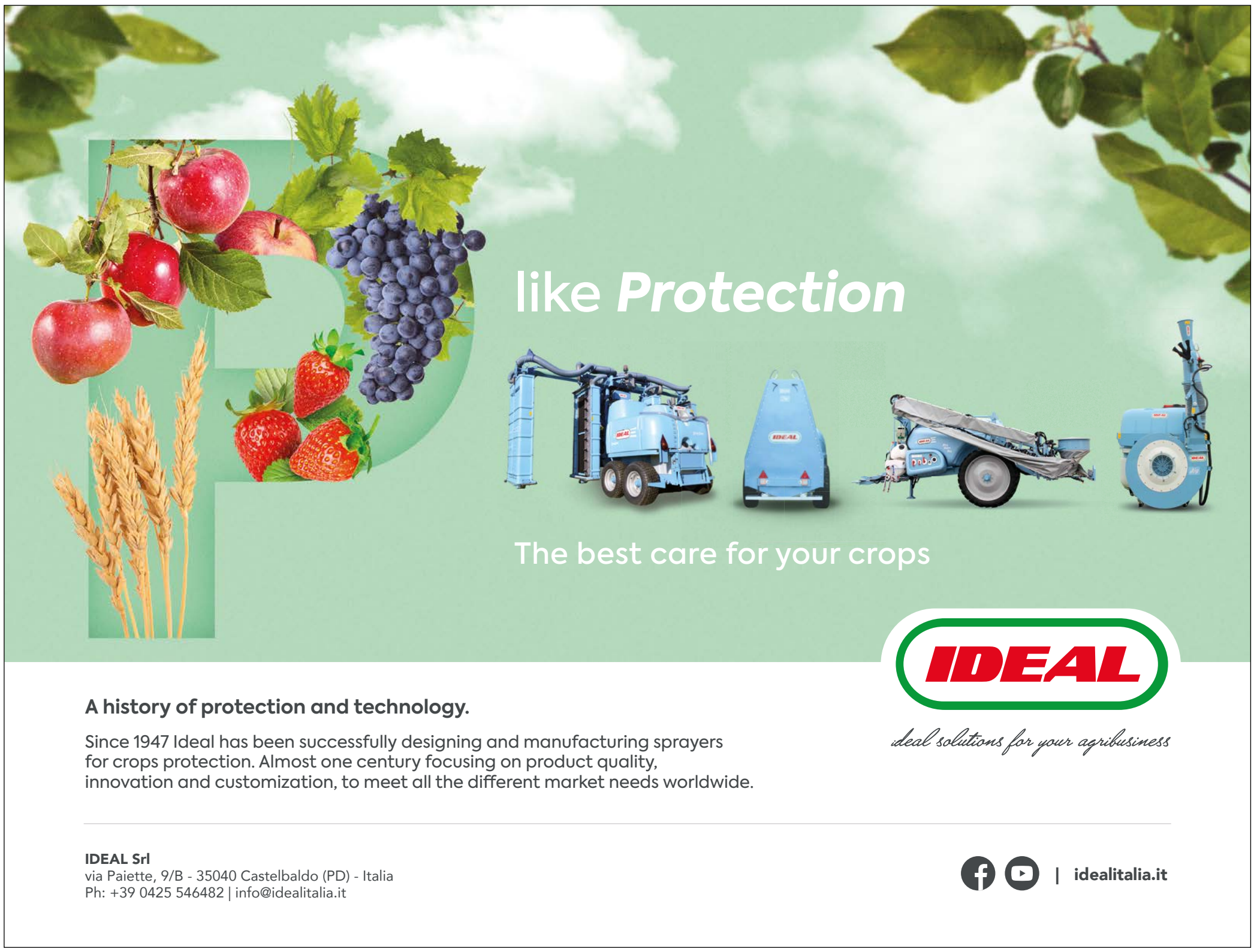
The slight decrease in volume, compared to what was forecast in early September, was due to lower yields both in the vineyard and in the cellar. Everything can be ascribed to the high temperatures in August and September combined with low rainfall, which affected bunch weight and increased the pulp/skin ratio.

The quality level has increased week by week, with peaks of excellence almost throughout the whole country.

The rain only arrived at the end of September and, in some cases, these were very heavy rains that were some cause for concern, though they didn't affect overall quality.

The change in the weather at the end of September/beginning of October, led to an acceleration in work at the end of the harvest, which has now terminated in most regions, slightly earlier than last year.

In fact, in general it was possible to harvest bunches with perfect phytosanitary conditions, also thanks to good day-night temperature swings, which favoured aromatic and polyphenolic concentration of grapes. Therefore, we can confirm the assessment of "excellent" for the 2020 vintage, which stands out for its widespread high quality, though with lower quantities than last year, but where the overall quality is very comforting and excellent wines are anticipated as a good omen for a relaunch period.



BAROLO
WHEN THE ORIGIN MARKS THE SUCCESS OF A WINE

by **GIANCARLO MONTALDO**

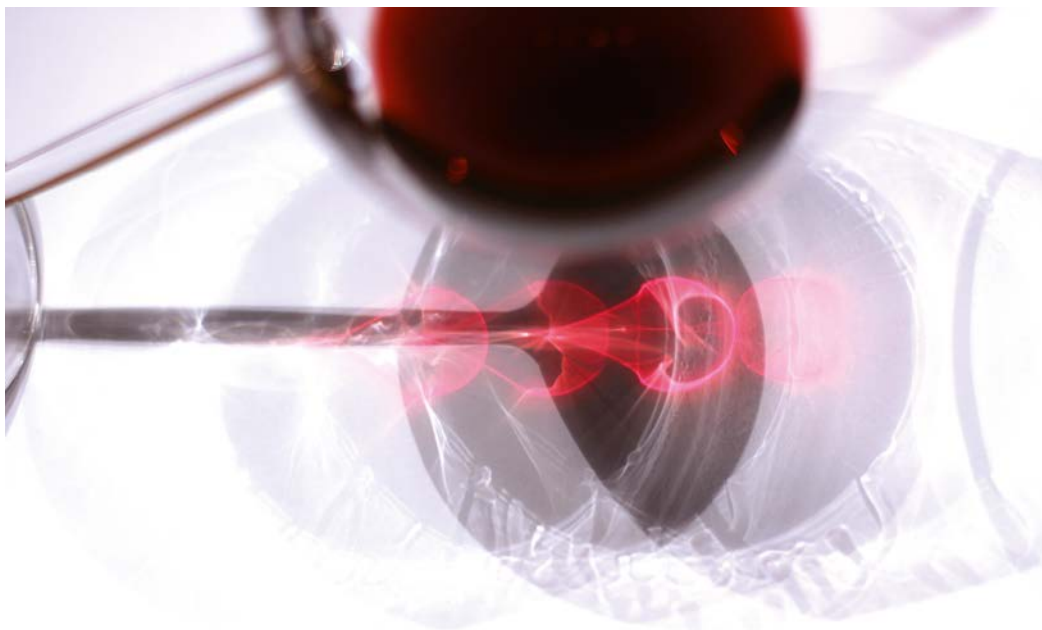
If we want to pinpoint the start of 'modern Barolo', the most plausible date is April 23, 1966, when Barolo was recognised as a DOC wine. The second date is July 1st, 1980, with attainment of DOCG status. The DOCG is universally considered to be the fundamental stage, because it carries out the passage from control on paper to a physical one, with the 'DOCG neck sticker' which ensures the bottle count and guarantees the correspondence between production potential and real production.

Another crucial moment is the period during the late 1980s and early 1990s, with the triptych of great vintages: 1988, 1989, 1990. During this phase, Barolo began to make a comeback, also on an international level. From that moment, the trade of the rest of the world was convinced that Barolo could belong to that limited circle of wines with unique characteristics that can stand the test of time.

The last strategic stage of Barolo's pathway is the date of September 30, 2010, with the launch of the new production regulations, the ones officialising the Additional Geographical Mentions, the portions of territory of origin more commonly defined as 'crus' or 'vineyards of particular value'.

Since 1966, there has been a crescendo in terms of identity, image and economic evaluation, though bearing in mind the ups and downs (as is the nature of things) that have come along during the various decades due to various, and not always interior, factors.

The identity of Barolo has remained unscathed, or maybe even strengthened, during the critical period of Covid-19. It may seem strange, or at least unexpected, but in the first ten months of 2020, the bottling of Barolo wine recorded an increase in 4 percent compared to the same period in 2019. This may also have been aided by the 2016, a vintage of high-quality and appeal, entering the market on January 1, 2020, when it immediately garnered success and the enthusiasm from Barolo lovers and connoisseurs all over the world.



The spotlight is on the identity of Piedmont's world-beater and the reasons for its growing success over the years, as well as the relationship with the Nebbiolo variety in reinforcing its identity and enhancement due to MeGAs (Additional Geographical Mentions), and finally its role as ambassador of the territory, also from the point of view of wine tourism

The Reasons Behind Its Success

The points of view are manifold, and so are the reasons that have brought Barolo's success on the national and international markets. A success with distant origins, which has seen a strong acceleration in the last few decades. Let's start with the opinions of some producers.

Luigi Bersano of MGM Mondo del Vino has no doubts.

"Apart from the 'integral' elements of the wine," he said. "I believe two factors have determined Barolo's change of gear and its increase in image. On the one hand, the strong increase in the number of producers, whether small or large, with synergic effects on the ability of the wine and its sector to penetrate world markets; on the other, the contribution of territorial food tourism, which has brought enthusiasts from all over the world to the Langhe area to discover the greatness of Barolo in person."

Fiorenzo Dogliani of Batasiolo adds other elements.

"Barolo's success is due to many factors," he said. "But one of the most important is its ability to stand the test of time, that marked longevity that has placed it among the great red wines produced in the world."

Michele Chiarlo and his son **Stefano** offer up a well-structured observation.

"The great merit for Barolo's success goes to its uniqueness," he said. "Extraordinary complexity, marked elegance and great talent for longevity. During the second half of the 1980s, an intense competition began between producers which led to surprising results for Barolo's identity."

Exploring the world of journalism, we cannot but speak to **Alessandro Masnaghetti** of the Enogea magazine, who has devoted special attention to Barolo during his professional life. He has clear ideas.

"The main reason for Barolo's success lies in the minds of the producers, in their attitude, in their way of tackling the subjects of production and the market," he said. "They are people who reason, who work hard, who don't wallow in self-pity, who prefer to go on the attack rather than the defence when facing a problem."

Carlo Macchi, editor of the online magazine Winesurf, has a more academic approach.

"Among the many factors at the base of Barolo's success, we

From left to right: LUIGI BERSANO of MGM MONDO DEL VINO, FIORENZO DOGLIANI of BATASIOLO, the CHIARLO FAMILY of MICHELE CHIARLO WINERY, ALESSANDRO MASNAGHETTI of the MAGAZINE ENOGEA

photo © Pesce 2014

Scriba Studio / ph.Paolo Marchisio

Quality

we design it, we build it,
we bottle it

GAI SINCE 1946 BOTTLING LINES 1.000-20.000 B/H
fraz. Cappelli 33/b, 12040 Ceresole d'Alba (Cn)
tel. +39 0172 574 416 - fax +39 0172 574 088
email: gai@gai-it.com - web: www.gai-it.com

GAI

need to underline three," he said. "First of all, the production numbers, also thanks to cautious management of the vineyard potential; secondly, the great willingness of producers to welcome visitors, even just tourists and enthusiastic consumers; lastly, the high and constantly-increasing overall quality of the wine. Each year you discover that they have been doing something new and concrete at the various wineries, to improve the quality and appeal of their Barolo."

Kerin O'Keefe, author of 'Barolo and Barbaresco – The King and Queen of Italian Wine' (University of California Press, 2014) and Italian Editor of Wine Enthusiast, also has clear ideas.

"There are various factors, but obviously the most important is the quality of the wine itself," she said. "Barolo is a world-beater. The best ones combine structure and elegance, have an appealing aroma and the depth of the unique flavours of Nebbiolo and they have great ageing potential which generates more complexity. It should also be said that improvements, both in vineyard and cellar practices, have made Barolo more flexible and graceful than before, especially regarding the increasingly noble tannins. This means that it is no longer necessary to wait twenty or thirty years before enjoying a Barolo, although the best vintages still have great ageing potential. For example, I find the 2008 wines perfect today, as well as the 2010 ones, but both still have many years ahead of them. Other things have helped Barolo to success: the name is easy to pronounce for everyone, which is no small thing for the export market. Also the fact it is made with a native grape and gives a great expression of the territory has helped Barolo to achieve its current success."

In the catering world, the most eminent voice is **Felice Rocca**'s, 'Nino' to his friends, owner of the Felicin di Monforte restaurant.

"Unique wine quality and type are at the base of Barolo's success," he said. "If you want to experience those sensations you have to drink Barolo. There's no middle way. Barolo is unique and has become even more so in the last 25-30 years, with the increase in the number of producers and their spasmodic search for the best at all costs. And then, it's made with Nebbiolo, possibly the most spectacular player in the Italian vineyard. Even if its name does not appear on the label, its contribution to quality and uniqueness is irrefutable."

The Link With Nebbiolo

It is a well-known fact that Barolo is made with 100 percent Nebbiolo and perhaps this is why nobody has ever thought of using it as a reinforcing value. Some have clear ideas about this. And not just today. **Ernesto Abbona**, owner of Marchesi di Barolo, the historic winery producing this wine, as well as president of Unione Italiana Vini, states this clearly.

"The geographical reference is the essential element," he said. "And Barolo is the confirmation of this. The Barolo appellation contains everything, the aristocratic nature of Nebbiolo, the steadfast structure of the Langhe area, the success of a compelling story and the unique features of a cold and temperate climate."

Despite the limited spread of Nebbiolo (the total vineyard surface area in the world is less than 7,500 hectares), this variety interprets different areas of Piedmont with authority and, what's more, creates other appellation wines identified exclusively by place name (Barbaresco, Albugnano, Gattinara, Ghemme, Gavi...). A pulverisation that is never accused of creating confusion for the consumer, unlike other varieties.

"If the place of origin adds specificity to all great wines," Mr. Abbona commented. "This is even truer for Nebbiolo, the vine that more than any other demonstrates a great capacity to adapt, in true symbiosis with the territory it grows on, transporting the soil characteristics, exposure and microclimate faithfully to the fruit: it wasn't communication agencies, which didn't even exist at the time, that created the Nebbiolo municipality appellations (Barolo, Barbaresco, Gattinara, Carema...), but enthusiasts and competent consumers of old. Identifying a wine with the name of the territory of origin and not the grape variety avoids easy imitations and safeguards the 'merit' of those who have given their commitment, dedication and stubbornness to reach excellent results."

The words of **Matteo Ascheri**, president of the Barolo Barbaresco Alba Langhe and Dogliani Consortium, also contain a reference to history.

"The duo of names, Barolo and Nebbiolo, is historic, though it is not obvious," he said. "It is significant that producers favoured the geographical reference already during the nineteenth century. It is a legacy we need to hold on tight to, even if, we mustn't generalise. Abandoning the reference to the variety and resorting to the exclusive use of the territorial origin has not always given the desired results. Iconic cases in the Langhe area are Diano d'Alba and Dogliani, where giving up the name Dolcetto didn't enable them to face other negative issues under discussion."

Gian Luigi Biestro's point of view is clear too (former director of Vignaioli Piemontesi and member of the National Committee for Designation of Origin Wines).

"The decision made many years ago was the right one," he said. "And I don't believe that the dual name with Nebbiolo would have brought any further advantages from the point of view of identity or personality. What's more, Barolo is also phonetically a very appealing name and, therefore, didn't need any other support."

The producers are also on the same wavelength. Very few have posed the problem, because that's how it's always been, but there is a reason that has found consensus with Luigi Bersano of Mondo del Vino and Fiorenzo Dogliani of Batasiolo.

"The reference to the variety is important in the descriptive phase of the wine," he said. "It becomes technical information to great effect, which helps to underline the value that the word Barolo already brings with it. In fact, combining the two elements in the name would probably have complicated the situation and flattened the identity of Barolo compared to other wines that bear the same reference to the grape variety."

"The vast majority of the most prestigious wines in the world only bear the geographical name of origin on the label," Michele Chiarlo underlined. "Therefore, the decision not to add the name of the grape variety was definitely a wise one. The success of Barolo has led to the enhancement of wines like Nebbiolo d'Alba or Langhe Nebbiolo, considered simpler interpretations of Nebbiolo than Barolo."

The press is on the same wavelength, too. Alessandro Masnaghetti, historic founder of Enogea and dynamic map maker of the world's great wine regions, has no doubt.

"Even if it's called Nebbiolo, the grape variety wouldn't have added anything to the name," he said. "Also because it has become so important due to the fact that it produces great wines like Barolo and Barbaresco. If anything, reference to it is useful to enrich the story that it already tells."

According to Carlo Macchi, "The use of the variety in the name would not have added anything more with respect to the reference of origin. In fact, today it would complicate the situation, causing confusion and an inefficient analogy with other appellations."

Kerin O'Keefe's opinion follows along the same lines.

"I don't think the name Nebbiolo on the label would have helped Barolo," she said. "Nebbiolo is experiencing a moment of glory today and has made itself known to fine wine lovers, but until not so long ago it wasn't a well-known name like Merlot or Cabernet Sauvignon, for example. Even without having the name Nebbiolo on the label, Barolo and also Barbaresco have taken Nebbiolo to its current success, just as Burgundy reds created the success of Pinot Nero, which never appears on the label."

The Wine Types And The MeGAs

The production regulations identify three types for Barolo: Barolo without specification, Barolo Riserva and Barolo Chinato. Each one has its own specific production conditions, with particular reference to compulsory ageing. Variety, territorial origin, yield per hectare and alcohol content don't change. Barolo without specification must age for at least 38 months from 1st November after the harvest, 18 of which in wooden containers; for Barolo Riserva, minimum ageing increases to 62 months with the same calculation and the same period in wood. Lastly, Barolo Chinato is regulated by Art. 7 of the regulations and its name is reserved for the aromatised wine prepared with a Barolo base wine and aromatised to allow a reference to cinchona.

There remains the case *sui generis* of the MeGAs, Additional Geographical Mentions. They are not a true wine type, but they could become such over time, at least the ones most claimed by producers and well-known. In any case, even if the MeGAs take on more importance in future, this will not lower the appeal of the Barolo appellation. In fact, Barolo with a MeGA compared to Barolo without any other specification, just adds a further reference of origin.

An important aspect in favour of MeGas lies in the fact that during the 2018 vintage, 59 percent of the Barolo produced claimed the Additional Geographical Mention, leaving 41 percent of Barolo production without any specification or Riserva. Of the 181 MeGAs inserted into the production regulations, 153 were claimed during the 2018 vintage, 84 percent of the total. This underlines the value that producers attribute to MeGAs in tune with the appellation as well as positive acceptance by the market.

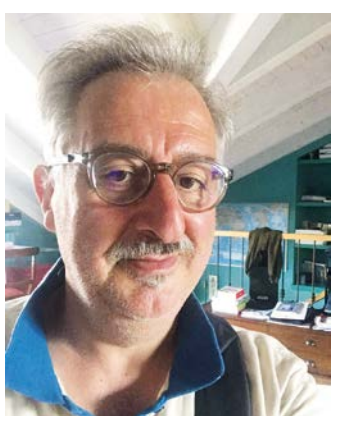
"The decision of the MeGAs is a winning one," Matteo Ascheri said. "The confirmation lies in the systematic relationship that the Consortium has with producers, from the smallest to the largest-sized ones. In future they deserve a more innovative and bolder management, giving space to the many theories that have recently filled institutional debates. I am referring to the opportunity to further underline MeGAs, at least the most claimed ones, without weakening their link with Barolo. This would enable us to highlight Barolo more strongly, which could increase market prices, especially of bottled wine."

"Recourse to the Mentions has met the need of every producer, i.e. the desire to differentiate himself from others," Gian Luigi Biestro echoed "After all, every appellation (also prestigious ones like Barolo) brings with it some homogenisation between the various territories."

"We were one of the first, right from the early 1970s, to understand Veronelli's suggestion to include some of the more famous single vineyards on the ➔

From left to right: CARLO MACCHI, WINESURF'S EDITOR, KERIN O'KEEFE, ITALIAN EDITOR of WINE ENTHUSIAST, FELICE ROCCA of the FELICIN RESTAURANT in MONFORTE, ERNESTO ABBONA, PROPRIETOR of the MARCHESI DI BAROLO WINERY, MATTEO ASCHERI, DIRECTOR of the CONSORTIUM BAROLO, BARBARESCO, ALBA, LANGHE AND DOGLIANI e GIAN LUIGI BIESTRO, FORMER DIRECTOR of the PIEDMONTESE WINE PRODUCERS and MEMBER of the NATIONAL WINE COMMITTEE.

photo © Paolo Tenti



NěSTGATE™

CONNECTED CLOSURES

Get closer to your product's journey from bottling to your customer's hand

NěSTGATE's connected closures give brands unprecedented opportunities to track and trace every bottle along the supply chain, engage directly with consumers everywhere from bars, restaurants, even from the luxury of their own home. You can manage stock with real time precision as well as guarantee product security and authenticity.

Discover our range of connected closures for spirits, wine and olive oil on www.nestgate-gualaclosures.com

Guala Closures Group

label," Ernesto Abbona, owner of Marchesi di Barolo, said. "After all, our family was already making wine and selling Barolo 'Prima Marca Cannubi' as well as Barolo Classico on the most prestigious markets at the start of the 1900s. Then, as now, we were excited by the increasingly fascinating comparison between single vineyards and blending, heralding considerations and stimuli towards constant improvement in quality and identity."

On the same wavelength, though with different nuances, is Fiorenzo Dogliani and Luigi Bersano's way of thinking. The former has no doubts, "The use of MeGAs doesn't pose any risk for the identity of Barolo. If anything, it strengthens it;" while the latter, "MeGAs meet a concrete need to distinguish a winery, which though enhancing the individual aspect, doesn't harm the overall appellation."

A bit more analytical, but just as clear, is Michele Chiarlo's way of thinking.

"I believe the use of MeGAs is a fundamental factor in promoting Barolo," he said. "Particularly the historic MeGAs, therefore the more famous ones, are a driving force for the whole of Barolo; they stimulate the enthusiast to discover the differences that exist between different areas and make them appreciate the complexity of Barolo soils, bringing considerable benefit to the whole appellation. They are also strategic commercially, since they are present on the best wine lists in the world and at very high prices, attributing further prestige to the appellation."

Similar clear ideas come from the specialised press, especially Alessandro Masnaghetti, who spent a lifetime alongside Veronelli. During these years, two books have been written on the Barolo MeGAs.

"In the world of Barolo, the Additional Geographical Mentions are a beacon and, as such, reinforce the identity of the wine," he said. "And they are not an end in themselves. In fact, they offer an essential contribution to the quality and image of Barolo without any specification."

"If I had been consulted on this subject a few years ago," Carlo Macchi explained. "When the MeGAs had just been inserted into the production regulations, I would probably have had some doubts. Today, in light of concrete results, I am convinced that their use in the Barolo appellation doesn't create any problem of fragmentation of the wine's identity."

"The MeGAs have been an important step in Barolo's history," Kerin O'Keefe underlined. "They have lifted its image. Because in large appellations, there are different expressions due to soil, elevation and microclimate. And for great wines, especially those made with a single variety, these different expressions capture the imagination and interest of enthusiasts. I'm not saying the MeGAs are perfect: there are several and some of them are quite vast. But in the end, it will be the consumers who decide which ones they like the most or the least. Perhaps, one day, the number of MeGAs actually used will decrease according to market demand, but this will not reduce their value."

Felice Nino Rocca of the Felicin di Monforte d'Alba restaurant, one of the traditional locations that has played an important role in creating the current identity of Barolo, also has something to say.

"As a restaurant owner, I say that MeGAs (or crus as we usually call them) make up a fascinating, but risky world, at the same time," he said. "Fascinating because they give a further contribution to the global image of Barolo, making it even more appetising, stimulating research and awareness. Risky because of the confusion they might generate for the less prepared consumer. But, if it's true that Barolo is not for everyone, also the Mentions are determining factors for that air of prestige that makes the wine even more appealing."

General Economic Values

In 2019, the vineyard surface area of Barolo stood at 2,184 hectares, about 100 hectares more than in 2012 (2,046). Effective production was 109,155 hectolitres, i.e. 14,362,496 bottles, stable since 2013, with the exception of 2014 (a more difficult year) when about 1 million fewer bottles were produced. A sore point was the volume of wine bottled in 2017 and 2018, with a reduction of about 1 million bottles a year due to a slowing down of the markets, especially for Barolos with less quality appeal and lesser-known brands. But the result for 2019, with 858,177 more bottles, and also a positive comparison with 2020 (the first 10 months of 2020 record a +4 percent on the same period in 2019) have practically turned the situation around.

The study developed by Corriere Vinicolo's Wine Observatory in 2019, placed the Barolo appellation among the best-performing ones on a national level, with an excellent ratio between wine claiming DOCG status and volume of bottled wine. In fact, the Barolo DOCG is one of the 80 (out of 470) appellations that have a bottled/DOCG claim ratio over 80 percent. 84 percent in the case of Barolo.

The Price Issue

More than the price in itself, or the price range observed for Barolo, the weak element is the split of the Barolo market into two parts. So, a quota of products with high prices has established itself in time, repaying not only production costs, but also other factors (image, prestige, quality, unique nature of the wines and the wineries). Then there exists a Barolo sold at a lower price, not always coherent with the prestige and advantageous position gained from the appellation. This is a difficult problem to solve unless the whole appellation is worked on.

With regard to this, **Claudio Conterno**'s observation comes in useful. He is a producer in Monforte d'Alba and president of CIA (confederation of Italian farmers) of the province of Cuneo.

"I must start by saying that, for every great wine, the quality pyramid must close at the top with very small volumes, "Mr. Conterno, who would like to work on the various types of the Barolo appellation, said. "Otherwise, it either isn't a quality pyramid or it doesn't work in favour of a great wine."

Let's take a look at his suggestion in more detail. "My suggestion is to divide the whole of Barolo production into three bands, tying them to objective situations deriving from the territory itself. The top of the pyramid should belong to Barolo with a reference to the 'vineyard' and relative place name, but on condition of low production per hectare (68-70 quintals of grapes). To identify the terrains that deserve the 'vineyard' reference, I suggest operating on vineyards planted before 1990, looking for the best positions, where the quality of the terroir influences wine quality. Barolo with Additional Geographical Mentions should be positioned at a slightly lower level. In this case, production per hectare shouldn't exceed 75 quintals per hectare. Lastly, the third level, the 'simple' Barolos, which could remain at the current production level of 80 quintals per hectare. In this way, we could quickly remove from the market several hundreds of thousands of bottles of Barolo, contributing to an increase in overall wine quality, an improvement in price level, not so much reducing the vastness of the price range, but rather increasing the lower level."

Bulk Wine Management

Obviously, the bulk wine market influences the price dynamics of Barolo, which has influenced the value of grapes as well as that of bottle prices. So far, the dynamics of these prices have been left to spontaneous development, if not prey to speculative events, alternately gratifying those who produce and those who purchase. The Consortium's position on this is clear and has been expressed by the president, Matteo Ascheri.

"The figure of a bottler is useful for the current dynamics of Barolo," he said. "But in the future, the situation should evolve in a more qualified way. Today's bottler almost works in a position of 'taking advantage' of the situation, without overly committing himself to the promotion (also financial) of Barolo. After all, the status quo is alright for the bottler, including the favourable position that producers of this wine have established over time with their activity. Ideally all of those who work with the Barolo appellation should develop the three phases of wine, i.e. grape production, winemaking and bottling and bottle sales.

To obtain this objective means planning the future in a different way, increasing the demand for Barolo on a global level, replacing consumers of top-priced Barolos with other consumers prepared to pay more. The promotional activity that we have planned and implemented in favour of Barolo falls within this context; such as the event in the area called Grandi Langhe and the one developed in New York, with the 2021 project to take it to China, covid permitting."

Also the Cantina Terre del Barolo, one of the key players on the bulk Barolo market, is on the same wavelength.

"The Terre del Barolo is working hard to gradually take all of its Barolo towards the bottled market," director **Stefano Pesci** confirmed. "And not only because we will maintain more added value in the winery and in vine growing, but also because we will achieve better management of the production potential and create other operational advantages with the strong management of the production procedures. As part of strengthening bottled Barolo, we are working to improve quality and the image of our winery's brand. Naturally, we accompany the market activities with large structural investments to favour the market of bottled wine, like the creation of spaces for wood ageing (20,000 hectolitres) and for bottle maturation (new storage areas for over one million pieces)."

The Great Phenomenon Of Langhe Nebbiolo

The Langhe appellation contains an extraordinary protagonist, Langhe Nebbiolo. Langhe Nebbiolo makes up over 7 of the total 18 million bottles in this appellation. A part derives from its own vine growing potential, but a significant quota comes from the reclassification of top-level designations, Barolo, Barbaresco, Roero and Nebbiolo d'Alba.

If Barolo, in the ratio between DOCG status claimed and wines bottled, presents a satisfactory, but not excellent, percentage (84 percent), this partly depends on the fact that in the months following winemaking and the claim, part of the wine is reclassified to Langhe Nebbiolo.

If this tends to modify the productive-statistical value of Barolo, because part of the wine claimed migrates towards another appellation, it risks determining another, more critical, consequence: or rather the presence of an amount of wine in Langhe Nebbiolo that was created to be a young, early-drinking product and another part of wine created to stand the test of time and, therefore, with different typological characters. This risks harming both appellations.

"Within the consortium we are trying to remedy this gulf," **Pietro Ratti**, coordinator of the Barolo Consulting Committee at the Consortium said. "To avoid a situation where someone who is looking for a young wine isn't disappointed by finding a wine with more challenging features in the glass and vice versa. Various ideas are being assessed, one of the most accredited would seem to be adding the type 'Langhe Nebbiolo Superiore' for wines that possess more structure and longevity."

To clarify, the relationship between production and consumption can be gratified, avoiding conflicts and misunderstandings. On the other hand, at a time when the management of Barolo vineyards is not able to accommodate all of those who would like to plant Nebbiolo for producing Barolo, having an alternative solution, halfway between Barolo and a young Langhe Nebbiolo, could lead to very interesting solutions, both for a winery and the sector.

Quality Wine Tourism

This is another element of value, i.e. the presence of tourist flows for the last a couple of decades, spread over almost all the months of the year, which want to find out about the wine and its characteristics and meet producers as the creators of a great development project. The presence of quality tourism, not just passing through, but remaining in the area for a few days, has made this economic sector grow, transforming an operational commitment that remained complementary and economically inefficient for decades, into something authoritative. The fact that the area of origin of Barolo belongs as a core zone to winegrowing landscapes of Langa-Roero and Monferrato, declared UNESCO World Heritage Sites a few years ago, has done nothing but increase the attraction effect that this production world exercises over a quality and very sensitive tourist flow.

"Barolo, like all great wines, is an extraordinary ambassador for its territory and its tourist movement," Ernesto Abbona concluded. "Strategically, the regional institutions should use the best-known DOCG wines to promote tourism on foreign markets. It is, in fact, completely clear that, when a tourist has reached the area, it is easier and certainly less costly in terms of promotional investments, to help them discover and appreciate other excellent winemaking products, combining them with the beauty of the territory of origin. Also, for this reason, I hope that other winegrowing areas in Piedmont will abandon the names of the variety and adopt the names of the municipalities as soon as possible: Barolo, Barbaresco, Gattinara, Carema, Nizza, Gavi... and, soon, Canelli, are simpler messages to convey. They underline the identity of the areas more and stimulate wine tourism all over our region, creating the chance to propose interesting and enjoyable alternatives, optimizing investments in promoting tourism and, in my opinion, obtaining results that are much more certain and long-lasting."

Top left:
CLAUDIO CONTERNO, PRESIDENT of CIA in the CUNEO PROVINCE;
Bottom left:
STEFANO PESCI, DIRECTOR of TERRE DEL BAROLO.
To the right:
PIETRO RATTI, COORDINATOR of the BAROLO BOARD at the CONSORTIUM

Molte volte le idee nascono dai sogni...
E a volte i sogni diventano realtà...

Noi ci siamo riusciti

SYNCROCAP™ SERIES

Distributore capsule a gestione completamente elettronica

Grazie ad un innovativo progetto meccatronico (FEDS Technology), il nuovo distributore SYNCROCAP riesce ad adattarsi automaticamente alle diverse capsule da lavorare riducendo così i tempi di cambio formato fino all'80% e le imperfezioni dovute all'intervento umano.
Il nuovo sistema di distribuzione prevede un funzionamento meccatronico perfetto, dove meccanica ed elettronica sono progettate e fuse per creare una simbiosi unica: gestione, movimentazione e settaggio vengono gestiti e controllati da servo azionamenti in grado di autoregolarsi in funzione del tipo di capsula da lavorare.
Inoltre il nuovo sistema è assolutamente orientato al futuro poiché rappresenta un ulteriore passo in avanti nell'era della digitalizzazione industriale e un reale dispositivo utilizzabile in un sistema di lavoro con standard Industria 4.0.

SCT SYNCRO CAP TECHNOLOGY | FEDS FULL ELECTRONIC DISTRIBUTION SYSTEM | SPS SMART POSITION SYSTEM | ECS ELECTRONIC CAM SYSTEM | ADS AUTO DIAMETER SETTING

CHANGE THE RULES...

Noi siamo già nel futuro... E tu?

norton

Passione, tecnologia, innovazione...

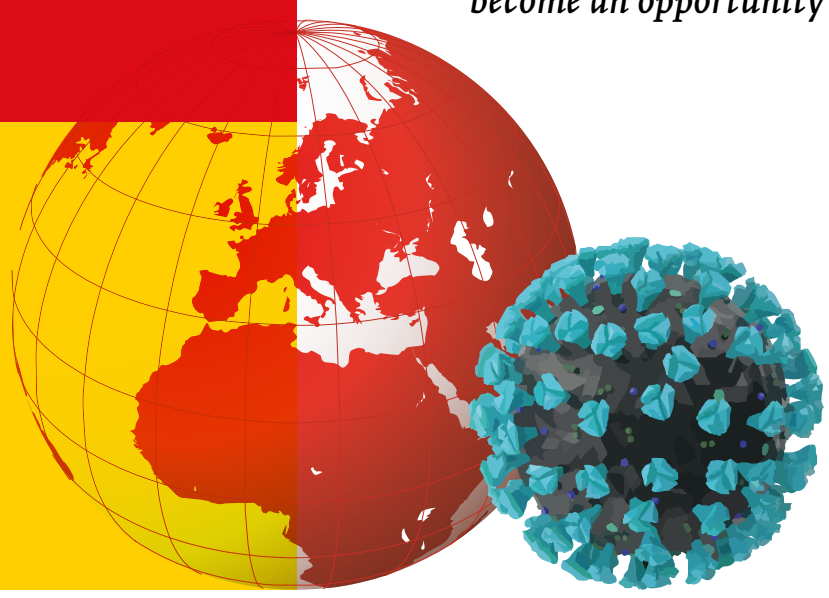
www.nortan.it

Seguici su

AN INTERVIEW WITH VERONIKA CRECELIUS, ITALIAN CORRESPONDENT FOR WEINWIRTSCHAFT

GERMAN SOLIDITY PUT TO THE TEST BY COVID-19

The market is holding up, even though the pandemic is changing consumer styles and methods. It will leave scars, especially on distribution, but if they are interpreted well, they could become an opportunity



"The wine market in Germany is not only very competitive," she said. "But also very stable. It may seem static and rather flat, but I would say that's reassuring in this period. Of the top four most important markets for Italian wine exports, Germany is the one that has held up the best during the first troubled half year of 2020."

This is how **Veronika Crecelius**, Italian correspondent for Weinwirtschaft, the leading magazine on the German wine market, describes the German wine situation.

Veronika, before entering into the current situation, please give us an overview of the German market.

For the last twenty years, average per capita consumption in Germany has fluctuated between 20 and 21 litres of still wine, in addition to 3-4 litres of sparkling and semi-sparkling wines, although consumption of bubblies is falling. According to the latest data from Deutsches Weininstitut, in 2019 average consumption was 3.3 litres, while during 2014/2015 it was still 3.7. Overall, we are talking about a market whose basic requirements are around 20 million hectolitres. Germany has produced 9 million for about the past ten years (two thirds are made up of white wines) and they export only one million, especially to the USA, then northern Europe, as well as Japan and China which are becoming important markets. In the last five years imports have fluctuated around 15 million hectolitres, though three of these are re-exported.

Germany is also a great producer country.

Yes, the vineyard surface area in 2019 reached 100,500 hectares and 25 percent is planted with Riesling, followed by Pinot Nero, Müller Thurgau, Pinot Grigio and Dornfelder. The market share for national wines has recently reached 45 percent, Italy is in second place with 16 percent, France at 12 percent and Spain at 9 percent. As for purchase channels in 2019, according to Deutsches Weininstitut's statistics, 79 percent of wine was sold through mass retail channels (including discount stores) where the average price was 3.12 euros/litre (3.31 for German wines). National wines bought directly from the winery or in wine shops reached an average price of 6.89 euros/litre. It should be pointed out that the statistics published are always much debated in the sector and especially criticised by researchers from the University of Geisenheim, whose studies indicate higher average prices. There is also a gap in almost all the statistics, which do not consider sales through the traditional channel in the absence of representative surveys. In any case, considering all the sales channels, it is estimated that the overall average price is 5 euro per bottle.

ENOVENETA

TECHNOLOGICAL PARTNER FOR WINEMAKING

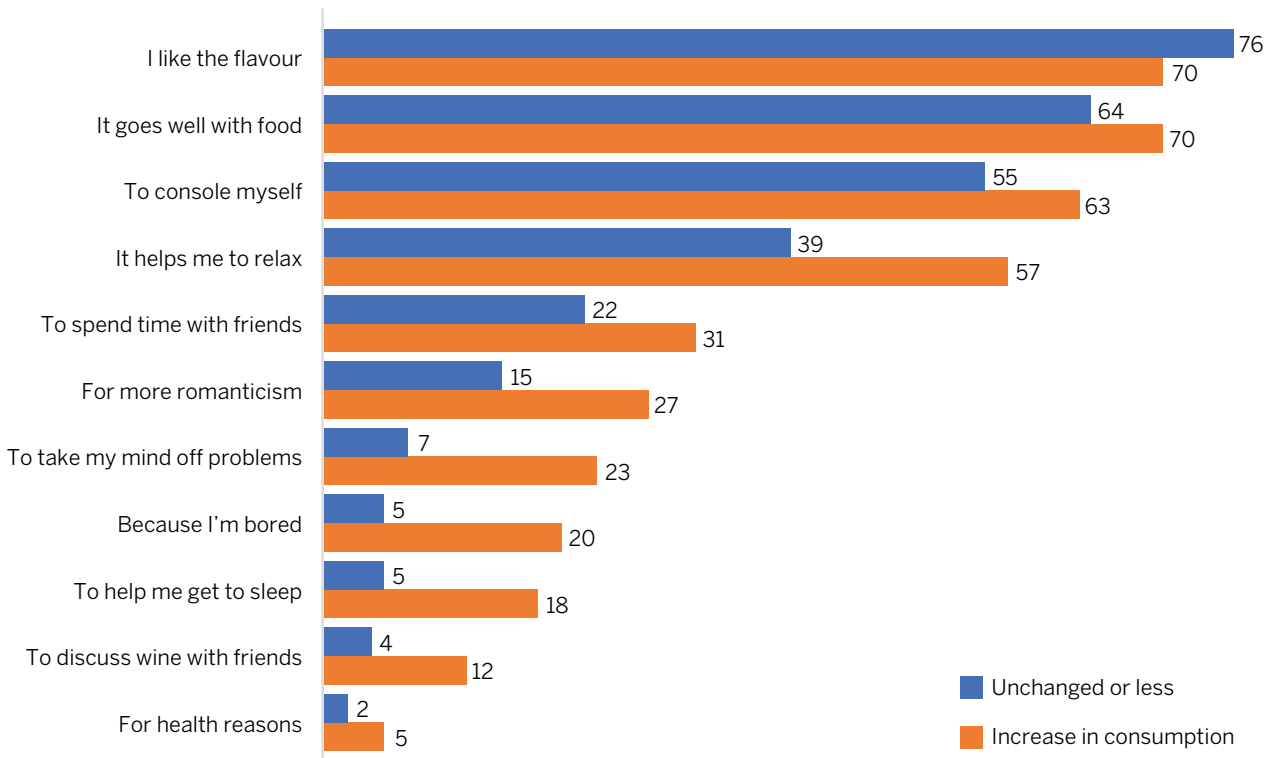
Destemming and crushing lines for both manual or mechanical harvest

Grape selection lines, with automatic or manual sorting technologies

Pressing lines with continuous press system and remote control intergation

www.enoveneta.it

Reasons For Consumption During Covid-Induced Restrictions



Geisenheim Survey, May 2020

Now we come to the current situation. What social restriction measures due to the pandemic have most impacted on the German wine market?

The closure of restaurants, bars, etc. has changed the way people drink wine, but has not decreased the quantity, quite the opposite. People drank more and probably even better quality, as Nielsen data for the first half of 2020 confirm. The turnover linked to mass retail channels has grown, more in value than in volume. The only channel seeing a loss are discount stores, which have fallen by 6.2 percent. Unfortunately, we don't have representative data for wine shops.

Which channels have suffered the most and which, on the other hand, have maintained their position or even grown?

Specialised wholesalers supplying the HORECA channel have suffered a lot and continue to do so. The same goes for producers geared mainly to catering. Out-of-home consumption recovered slightly during the summer months, but the situation for hotels has remained very hard and many events were cancelled with disastrous effects for the catering sector. With the new German lockdown in November, these figures recovered by catering/bars will nosedive once again. Let's hope that the aid promised by the government doesn't arrive too late.

For mass retail, these have been months of constant growth, which was also confirmed in September although less accentuated than in the months from March to June. According to IRI, in mass retail, including discount stores (with a surface area over 200 m²) both the value and volume of wine sales increased by 7.8 percent compared to September 2019. The growth peak came between March and June with +14 percent in volume and +16 percent in value. In total, we are talking about +9.2 percent in volume and +11.1 percent in value during the first nine months of 2020, compared to the same period in 2019.

At Meininger's International Wine Conference, held in mid-October in Düsseldorf, Professor Simone Loose of Geisenheim University presented a survey on consumption during lockdown. Of a panel of consumers, considered those who drink wine at least once a month, 21 percent claimed they had drunk more white wine, 18 percent more beer and 13 percent more red wine than before the pandemic. Among those who drink wine regularly (once or more a week), 32 percent increased their average consumption for the following reasons: to enjoy the aromas and flavours of the wine more (70 percent), to pair wine better with food (70 percent), to console themselves (63 percent) and to relax (57 percent) (see the diagram).

Was e-commerce widespread, and how much, in Germany before Covid? Has it grown? How, and how much?

In 2019, e-commerce covered a share of 4 percent of the market and was rising rapidly. During the darkest months, sales literally exploded. In three months, they took a leap that they were expected to make in three years. But this created a lot of chaos. Wine shops tried to add online sales to the traditional off-line channel, and producers accelerated the creation of winery e-shops or landed on e-commerce platforms that they had previously considered unreliable partners for their image and their price policies. Among the e-commerce channels that stand out, we have Superiore.de which has been around for 17 years and only focuses on Italian premium wines, selling almost exclusively to private citizens. It numbers 100,000 regular customers (more than 1,500 in catering) with an average price per bottle equal to 16.45 euros. The dynamism of its sales is a benchmark for explaining the growth for e-commerce during lockdown: January +25 percent, February +30 percent, March +50 percent, April +100 percent, May +90 percent, mid-June still +70 percent, compared to the same period in 2019. And all of this, considering that the real lockdown in Germany was shorter than in Italy and lasted from March 21-22 to May 11-12, with differences of a few days from region to region (Länder).

Do you think it is a stable growth or, in your opinion, will we go back to physical purchasing and therefore digital will lose the importance that it has taken on, also in Germany, during these months?

Physical purchasing, with the pleasure of discussing and tasting wine, will always be irreplaceable, but I believe that the growth of e-commerce is destined to become stronger. Many people have bought wine for the first time online and have realised that it is easy and convenient. The essential and devastating reason remains the pandemic and its long-time span, considering the recent staggering increase in infections and the consequent new measures put in place. If it is not the restrictions, it will be fear that drives people to buy without contact.

Is there a clear divergence between the choices of young and adult consumers, in terms of ways and places to buy and consume wine, as well as wine types? If so, can you give us some examples?

The divergence is very clear. At Meininger's International Wine Conference in October, two surveys were presented on the new generations. The study by Prof. Gergely Szolnoki of Geisenheim highlighted the differences between wine consumers with ages between 16 and 35 years of age and consumers over 35. Let's look at some examples. It turns out that 57 percent of young people prefer white wine and only 25 percent red wine, 18 percent rosés. The preferences of more mature consumers are more balanced. Among them, 44 percent both red and white wine and only 12 percent rosés. While 38 percent of young people prefer semi-dry wines (31 percent dry), while only 20 percent of adults lean towards wines with high residual sugar. A lot changes between the two groups also when it comes to places for consumption. The over 35s drink 60 percent of wine at home and 16 percent during meals with friends or family. The under 35s consume 40 percent in their own home and 30 percent at other people's houses. The subdivision in the on-trade segment shows that 15 percent of young people's consumption takes place at out-of-home events and 15 percent in catering/bars. The other group prefers restaurants (18 percent) and events only count for 6 percent. The places where the more adult groups buy are varied, probably because they understand more about wine and have more money at their disposal. Young people buy 47 percent of their wine at discount stores and 40 percent in supermarkets. One nice thing that emerged from the 16-35 age group is that more than half of them consider wine to be an integral part of their cultural heritage. The percentage for beer only reached 38 percent. It's funny how for 53 percent of the younger age group, bubbles seem to be a suitable drink for women and nobody labels sparkling wine as a drink for men.

What post-Covid scenario can the HORECA channel expect? Will there be closures, shake-ups or even a focus on USA/UK-style restaurant chains?

There will be a deep crisis for those who haven't managed to diversify and there will certainly be closures and shake-ups, but it won't come to a focus on USA/UK-style restaurant chains. The Germans don't like them enough, they only eat the odd hamburger during the year, but they love the multicultural scene and their regional food. However, the danger of a deep crisis for specialised suppliers exists, despite the fact they are trying to expand their activity, among enormous difficulties, in order to reach the end customer and/or wine shops. Everything depends on how the pandemic pans out and how, and how often, premises and territories will be locked down. In the worst case, a further concentration of distributors in the sector seems more likely than a concentration of catering towards chains. Let's hope it doesn't happen, also because it would penalise further the diversity and flexibility of the supply. I think it is appropriate to develop plans for different post-Covid scenarios. And the decision-makers of the category of distributors and importers should get together to identify opportunities and create cooperation and collaboration between specialised distributors. It could be useful for tackling the worst scenario.

ABOUT VERONIKA CRECELIUS

Veronika Crecelius graduated at the Freie Universität Berlin, worked in Radio and TV and then for seven years as editor of the magazine Der Feinschmecker in Hamburg. She began specialising in wine at the end of the 1990s particularly focusing on Italian wines. Since 2008, she has held the position of Italian correspondent for Meininger Verlag's magazine Weinwirtschaft. She has received several awards including the PrixLanson for best wine journalist in Germany.

At Shenzen, The b2b Event Promoted At Veronafiere

DEBUT FOR WINE TO ASIA WITH 200 EXHIBITORS

Two hundred exhibitors, eight represented countries, twelve Masterclass courses and, not to be missed, Living Wine, the big exhibit area dedicated to natural wines, as well as buyers coming from the major cities of the Chinese Greater Bay Area. This is Wine to Asia, the startup of Veronafiere, making its debut at the Intercontinental Hotel of Shenzhen on November, 20 and 21.

This exhibition enriches the twenty-year experience of Veronafiere in China, starting with the "Fuori Salone- Side Events" in Chengdu and the roadshow activity in first and second-tier cities, which reached Shanghai and Xiamen in 2020.

Co-organised by Veronafiere and Pacco Communications, Wine to Asia is a b2b event. Shenzhen is indeed where 30 percent of the Chinese wine importers are located, besides the renowned big high-tech companies. The liveliness of the city is capable of influencing the trends of a large part of continental China.

The above and the present scenario in the "country of the dragon" were the subjects of the webinar "Wine market in China: the new normalcy," organised by Veronafiere-Vinitaly, in anticipation of the debut of the startup in China and as an approaching stage to the wine2wine exhibition digital edition scheduled online for November.

China is indeed in fifth place in the world ranking of wine consumption in volumes, behind the United States, France, Italy and Germany. Therefore, wine has a large room for growth.

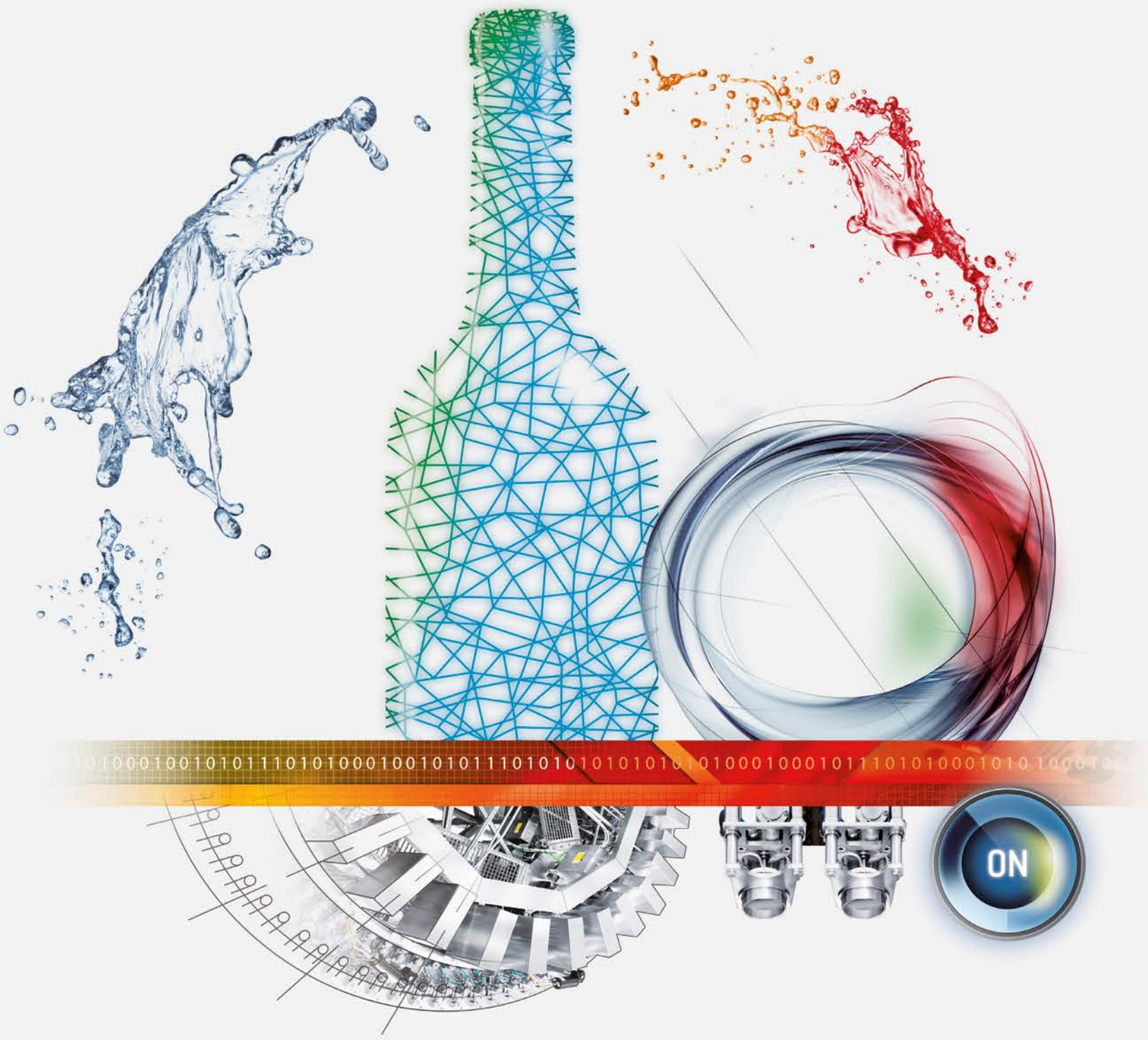
"The year 2020 represented a 'reality check' for the wine world," Jim Boyce, founder of the portal "Grape Wall of China" said. "Good news: the data of Chinese wine are overrated and thus there is a good market margin for imported wines. Bad news: a vertiginous upswing of beer and Baijiu (Chinese liquor). The spread and culture of wine are unfortunately clashing with a systemic problem of disconnection from sales, losing track of the final consumer. The wine system should learn from the beer and cocktail worlds how to connect consumers. To give you an example, during the lockdown craft beer became predominant in Beijing. There were beer producers that organised travelling shops, moving to the major residential areas. Others encouraged the producers in Wuhan to help them and others relied on merchandising. Beer also wins in the pairing with convivial food, wine only lowered prices."

According to Leon Liang, CEO and wine educator of Grapea & Co., in order to grow in China, exhibitions, events and festivals are necessary, as well as digital tools and media for the creation and spread of information contents.

"In order to sell, design, label and packaging are important," Mr. Liang said. "Another fundamental element is promotion to reach new targets, such as for example women aged between 20-35 years, who like drinking at home. It is important to speak with people and ask them how often they drink wine. To those who drink once a year, we should propose wines that received awards or recognitions. To those who drink at least once a week, we could ask what they drink and evaluate their product knowledge. In any case, the Chinese are curious, maybe continental Chinese people are a bit more conservative, but on the coast there is much more openness to novelties and to Italian wine. By winning over the latter, in short we can reach even the first ones."

SIMEI

INTERNATIONAL
ENOLOGICAL
AND BOTTLING
EQUIPMENT
EXHIBITION



LEADER IN **WINE** & **BEVERAGE TECHNOLOGY**

ORGANIZED BY

UNIONE ITALIANA VINI

FIERA MILANO

29th EDITION

16th-19th November 2021
Fiera Milano (Rho) - ITALY

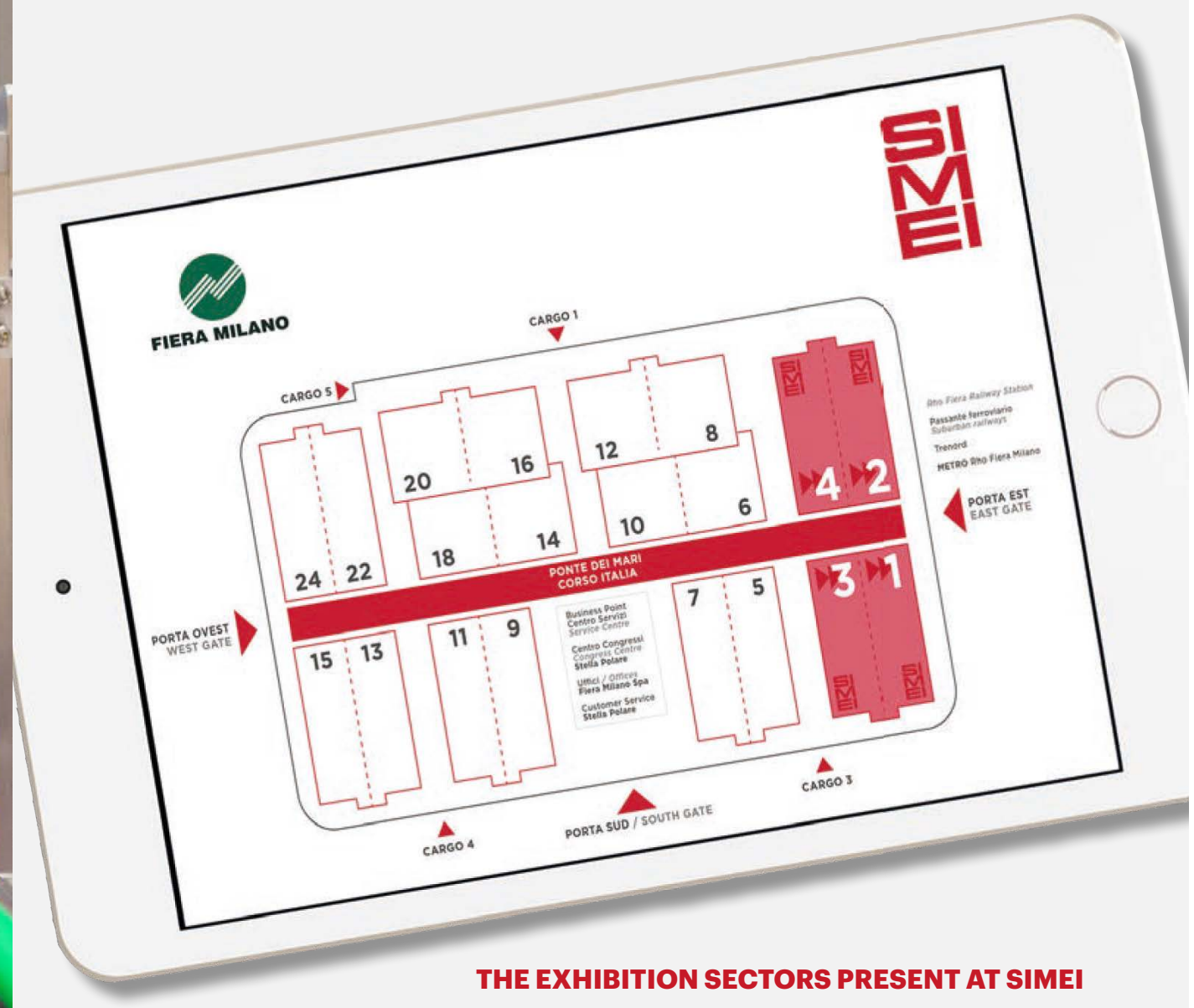
info@simei.it / simei.it

THE MOST IMPORTANT INTERNATIONAL SHOWCASE FOR TECHNOLOGY AND PRODUCTS FOR THE WINE & BEVERAGE INDUSTRY

OVER
31.000
VISITORS FROM
90 COUNTRIES

600
EXHIBITORS FROM
25 COUNTRIES

70.000
SQUARE METERS
OF EXHIBITING SPACE



THE EXHIBITION SECTORS PRESENT AT SIMEI

- Raw materials, chemicals and biologicals
- Manufacturing equipment and process technologies
- Fermentation and ageing containers
- Filters and filtering plants
- Inspectors, graders and monitoring equipment
- Washing machines and products
- Measuring equipment and products
- Bottling and filling
- Sealing machines
- Containers
- Closures
- Labelling and printing systems
- Packaging and in-house transport
- Transversal equipment and products
- Services

WINE OBSERVATORY

THE STATISTICS OF THE PHENOMENON IN ITALY AND IN THE WORLD, AS OUTLINED BY THE UNIONE ITALIANA VINI OBSERVATORY

SPARKLING WINE + ROSÉ? OR A BRAND-NEW CATEGORY?

by **CARLO FLAMINI**

In 2021, the entry of Prosecco Doc Rosé onto the scene in full force, with 50 million bottles, will mark a turning point for this segment. Which is worth 150 million bottles a year and offers great opportunities, provided that there are no slip-ups at the start

The sum of two diversities? Or a brand-new category? This is the question posed when looking at the scenario for 2021, when Prosecco rosé will really enter production and the characteristics of Italian and world-wide sparkling rosé production will take on a new dimension and new balance: with 50 million bottles expected (10 percent of the DOC total), Prosecco is set to become an absolute monopolist, with about 30 percent of a market that will be producing 160 million bottles, for a consumption of 150 million pieces, i.e. 5 percent of total world sparkling wine consumption *(figures 1 and 2)*.
Therefore, from 2021 the sparkling rosé wine sector will turn over a new leaf and write a new history. It helps that it starts from a well-defined base, with two tried and tested products, perhaps the only real phenomena in world consumption in the last ten years: rosés and sparkling wines.

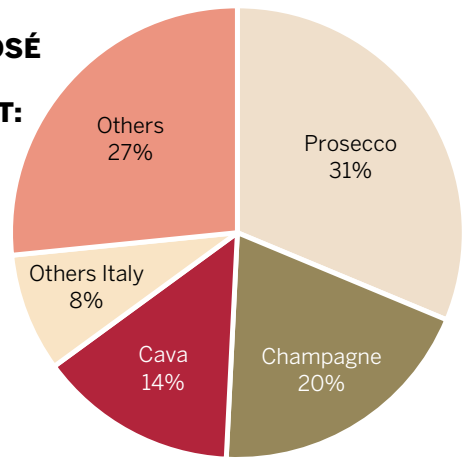
The Base Ingredients: Rosé and Sparkling

Thanks to a boom in wines from Provence in the USA, rosé wines have finally freed themselves from the image of a "by-product" of red wine, without a specific identity, a second choice. They have become a true "wine style", creating the category of "rosé wine consumers". Today, world consumption of rosé wine accounts for 2.8 billion bottles, just under 10 percent of still wines, and it is still growing *(figure 3)*.
On the other hand, since 2015 Prosecco has made the sparkling wine category more "democratic", which had an apex (Champagne) and a base (general sparkling wines and Cava), but not a central group. It is a global phenomenon, worth about 3 billion bottles today (8 percent of total world wine), which has built up a new set of consumers, expanding the public and attracting mostly women and young people to wine drinking.
There are meeting points for both of these phenomena, which may cause potential problems, however. Both survive on strong market concentration. For rosés, France, Germany, USA and UK make up 2/3 of world consumption, while for sparkling wines USA, UK and Germany form 40 percent of total world trade, with Germany and USA also being producers/consumers of a certain level and Italy, France and Spain monopolising exports.
Unlike red wine, which is an across-the-board product all over the world and has opened up countries like India and China to wine consumption, rosé and sparkling wines are still markedly western products.

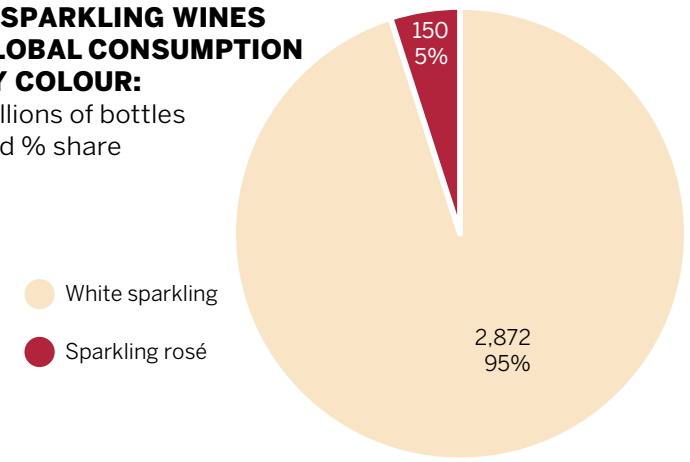
Medium-term Outlook

If we put the two categories together and imagine sparkling rosé wine as the simple addition of "sparkling" and "rosé", we certainly have markets that are already receptive and open to mass market products. Unlike sparkling white wines, there is still an extreme polarization of consumption. On the one hand, there are luxury goods (pink Champagne, about 30 million pieces, 10 percent of global AOP production) and on the other, popular premium wines mostly made up of Cava (about 25 million bottles, also 10 percent of the total) and the rest of world production, about

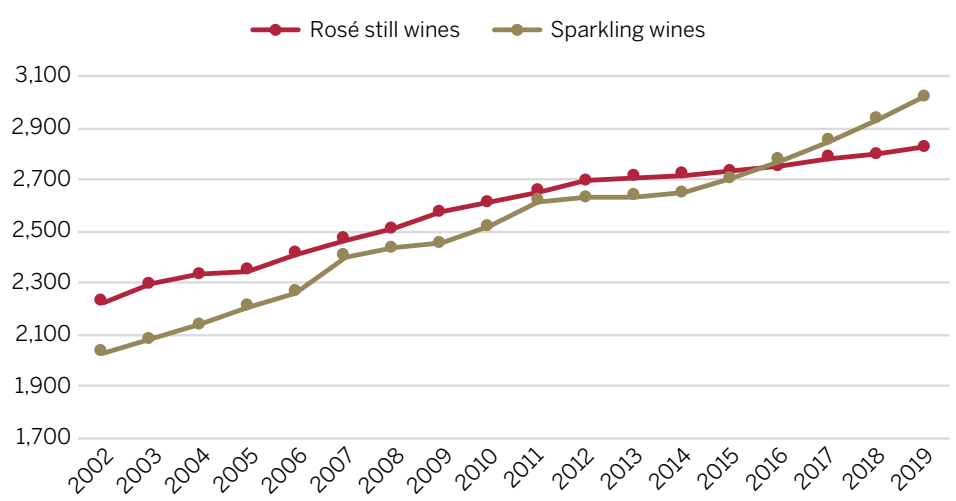
1. GLOBAL SPARKLING ROSÉ PRODUCTION - 2021 FORECAST: 160 millions of bottles



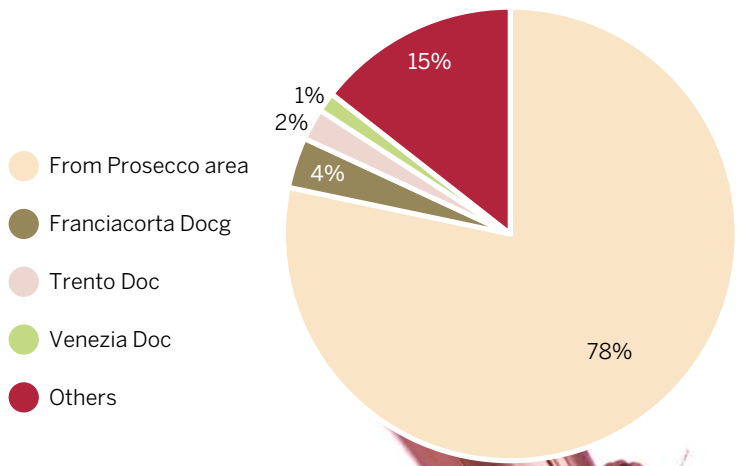
2. SPARKLING WINES GLOBAL CONSUMPTION BY COLOUR: millions of bottles and % share



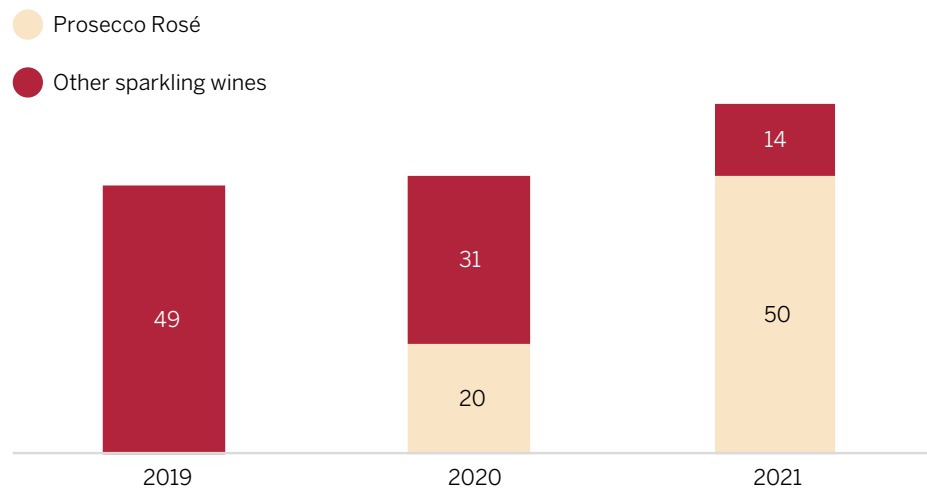
3. ROSÉ STILL WINES AND SPARKLING WINES: GLOBAL CONSUMPTION (millions of bottles)



4. ITALIAN SPARKLING ROSÉ PRODUCTION - 2019:
49 milions bottles



5. BEFORE AND AFTER PROSECCO ROSÉ IN ITALY
(millions of bottles)



60 million bottles.
If Prosecco rosé, with its 50 million bottles, positions itself above traditional Prosecco and below Champagne, there will be more alternatives for Italian sparkling rosé wines, but they must be valued according to the type of sparkling wine produced. There will probably be room, a niche, for high-level traditional method sparkling wines between Champagne and Prosecco rosé. Or else, it can follow the path of Prosecco Rosé, with the risk of being absorbed by a product that "marks" the consumer, tying him down almost exclusively. Or it can remain below, which means competing with traditional Prosecco and all the rest, but the risk of being rejected by the market is very high, because it would mean entering a "completely nondescript" category.

The Italian Supply

The supply of pre-Prosecco Italian sparkling rosé wine was made up of about 50 million pieces *(figure 4)*: 78 percent of these consisted of Sparkling rosé wines from the Veneto, produced in the Prosecco area. These were the so-called "forerunners" of the new DOC category, those that the Consortium built future projections of the new wine type on. Then, remaining in the group of denominations, Franciacorta rosé (1.8 million bottles, 11 percent of the total DOCG), Trento (1.1 million, also 11 percent), sparkling rosé wines from the Venezia DOC (680,000 pieces) and the DOs and IGs coming under Lambrusco (640,000 bottles), and about 340,000 pieces of DOC Sicilia and Terre Siciliane IGT. The others were rare bottles and collectors' pieces, like Cruasé from Oltrepò (71,000 bottles), Alta Langa (76,000) and Nebbiolo d'Alba (32,000) *(details in table 1)*.

This year, if the Prosecco Consortium's forecast is confirmed, 20 million bottles of rosé will enter the market, 4 percent of the DOC, which will take the Italian supply to 51 million. Then there will be a boom from 2021 onwards, when Prosecco Rosé reaches 50 million bottles, regaining the 78 percent share of the 2019 national supply, which will soar to 65 million bottles *(figure 5)* in the meantime. In the end, in 2021, non-Prosecco Italian bottles will stand at 14 million, 8 percent of the world total.

The Targets: Germany, UK and USA

What is the outlook? The homogeneous mass of a strongly characterised and well-known product like Prosecco, will induce the consumer to tune into a product that is not just the algebraic sum of rosé and sparkling wine, but something else, a new category, just like rosé was, and then sparkling wine after it. It is necessary to avoid making the mistake of thinking that a traditional still rosé wine consumer will become a "sparkling rosé wine consumer". The new product category - if it really is a new category - will probably attract consumers from both segments, but it will very probably create new ones, too, thus expanding the new consumer base.

Today, the database of a potential sparkling rosé wine consumer to base our reasoning on, isn't that sound, which is why we can trust the identikit of the rosé and sparkling wine consumer, in order to understand if there are more agreements rather than divergences.

Let's start with the German market: Wine Intelligence has observed a very high level of knowledge of Italian sparkling wine, especially Prosecco, over 54 percent of wine consumers, while about a quarter know Italian , with a peak of 30 percent for Bardolino Chiaretto. Segmenting by gender, Italian still rosé wine is drunk more by men (60 percent), while other rosé wines and Prosecco are consumed by a public mostly made up of women.

By age group, another feature of Italian rosé is the predominance of the 35-54 age group (about half), while Prosecco is across-the-board and general rosé tends towards older age groups, as does Sekt.

As for income, the bulk of German Italian rosé wine consumers fall into the 30 - 70,000 euro band (60 percent of the total), while Prosecco is more democratic, with two thirds of consumption concentrated below 50,000 euros, like for Sekt.

In the UK, of course, the level of Prosecco's popularity is unrivalled: 80 percent of the population of wine consumers know it, a share that drops to 20 percent for Italian rosé. Here, unlike Germany, frequent purchasers of both wine types are women, with a percentage point more of men for Italian rosé, while the age group for this wine type seems to be the younger generations (42 percent), compared to both Prosecco and Pinot Grigio, this latter being much more unbalanced in the older generations of the population.

As for income, the differences are not so deep, with Prosecco being a bit more across-the-board of the social classes, while rosé finds almost half of its consumers in the middle classes.

Lastly, we come to the USA, where Prosecco shows a popularity of around 40 percent, compared to 21 percent for Italian rosé. 24 percent already know Prosecco rosé, even before really encountering it, such is the strong evocative force of this product on the American consumer.

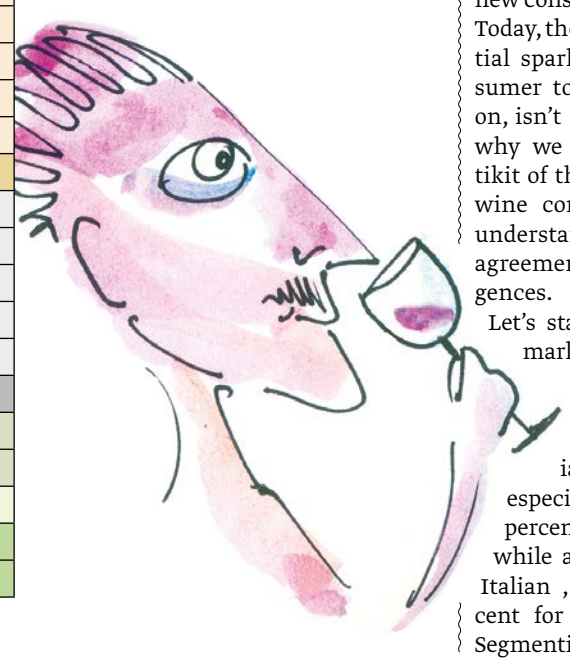
Prosecco and rosé are products for men and women alike, just as for the different age groups, though maybe a percentage point higher for young people for Italian rosé, especially if compared to Pinot Grigio which, like in UK, has a strong core of more mature consumers, i.e. the Baby Boomers.

As for income, here there is a slight difference between Prosecco and Italian rosés in the lower band, with 36 percent of American consumers devoted to still rosé compared to 30 percent for Prosecco and 28 percent for Pinot Grigio.

TAB. 1 - SPARKLING WINES PRODUCTION IN ITALY WITH A PDO-PGI
(bottles, 2019)

PDO/PGI	Region	Bottles
Emilia Lambrusco Rosato Spumante IGT	Emilia Romagna	312,024
Emilia Rosato Spumante IGT	Emilia Romagna	6,993
Lambrusco di Sorbara Rosato spumante DOC	Emilia Romagna	75,956
Lambrusco Grasparossa Castelvetro Rosato spumante DOC	Emilia Romagna	34,119
Lambrusco rosato di Modena spumante DOC	Emilia Romagna	204,700
Lambrusco Salamino di Santa Croce Rosato spumante DOC	Emilia Romagna	6,660
Rubicone Rosato Spumante IGT	Emilia Romagna	59,756
Alpi Retiche Spumante metodo classico Rosè IGT	Lombardy	3,487
Franciacorta Rosé DOCG	Lombardy	1,756,304
Oltrepò Pavese Metodo Classico Pinot nero Rosé DOCG	Lombardy	67,105
Oltrepò Pavese Metodo Classico Pinot nero Rosé Vigna DOCG	Lombardy	3,381
Oltrepò Pavese Metodo Classico Rosé DOCG	Lombardy	567
Marche Rosato Spumante di Qualita IGT	Marches	16,119
Alta Langa Rosato DOCG	Piedmont	67,963
Alta Langa Rosato Riserva DOCG	Piedmont	8,097
Nebbiolo d'Alba Spumante Rosè Metodo Classico DOC	Piedmont	32,244
Piemonte Pinot Nero Spumante Rosato Doc	Piedmont	15,952
Piemonte Rosato Spumante DOC	Piedmont	47,752
Castel del Monte Rosato Spumante DOC	Apulia	13,541
Sicilia DOC	Sicily	31,102
Terre Siciliane IGT	Sicily	314,326
Trento DOC	Trentino	1,100,000
Venezia Rosato spumante DOC	Veneto	678,664
Vigneti della Serenissima Rosé DOC	Veneto	4,053

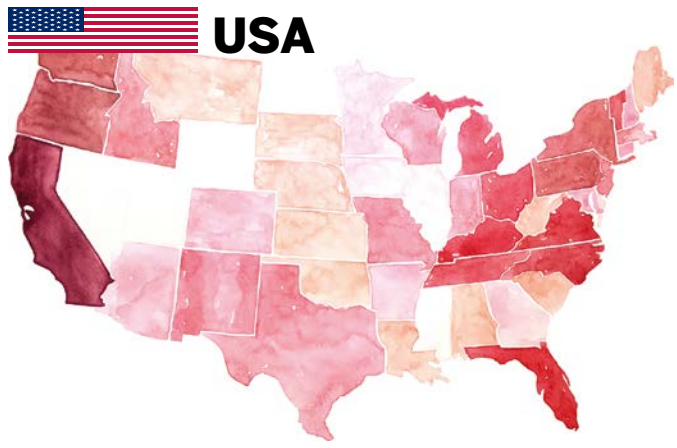
This list is not to be intended as the total Italian production
Source: Valoritalia, Consorzio TrentoDoc, IRVO



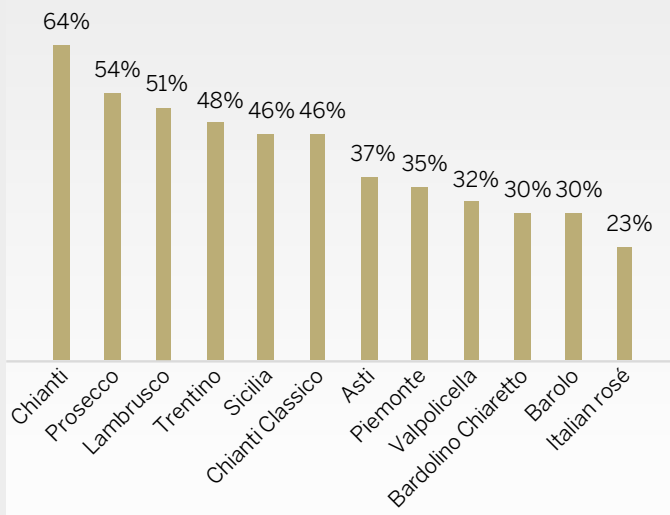
Germany

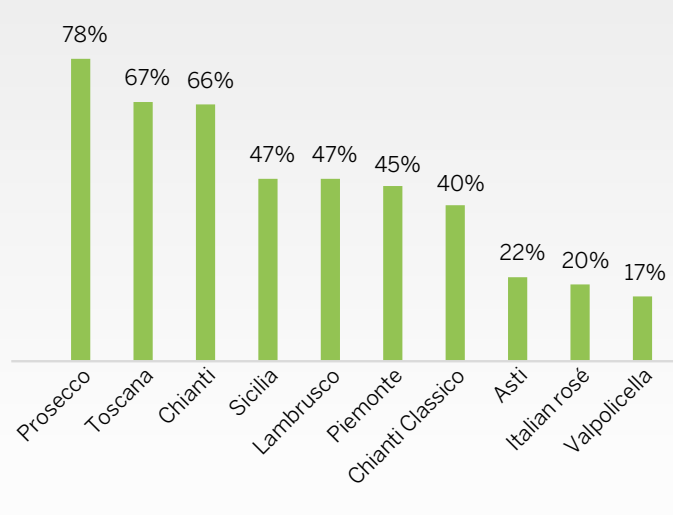
United Kingdom

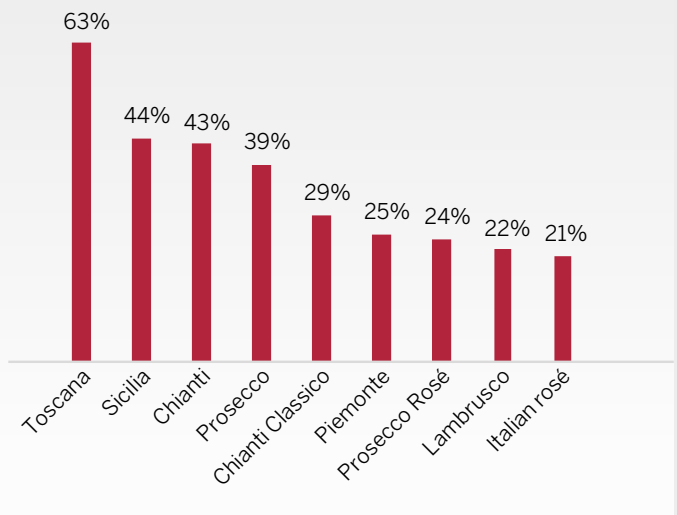
USA



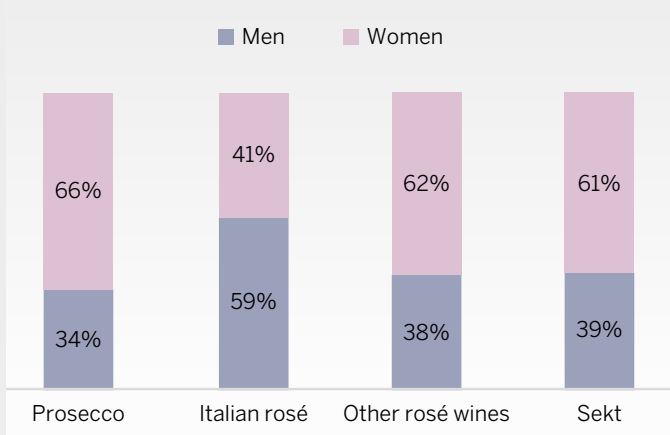
WINE KNOWLEDGE: % OF TOTAL CONSUMERS

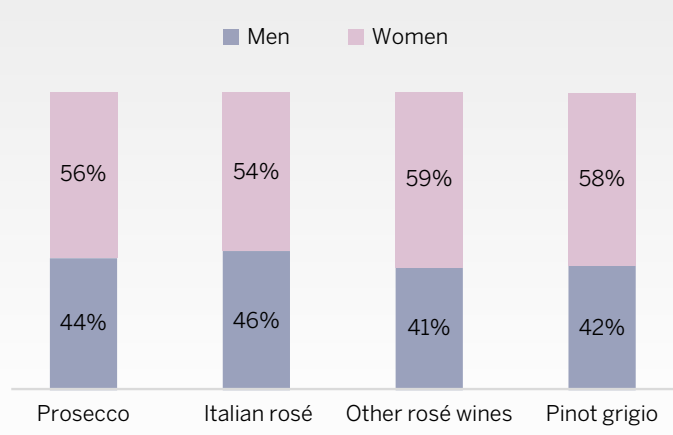


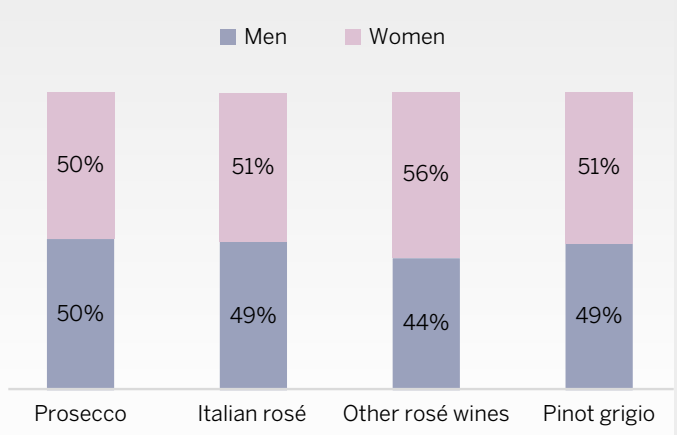




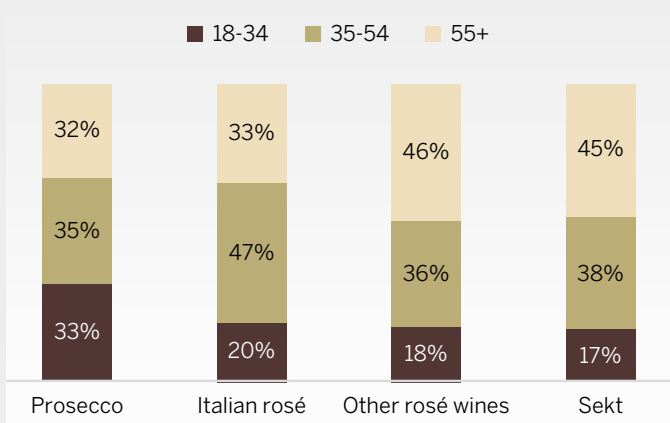
CONSUMERS BY GENDER

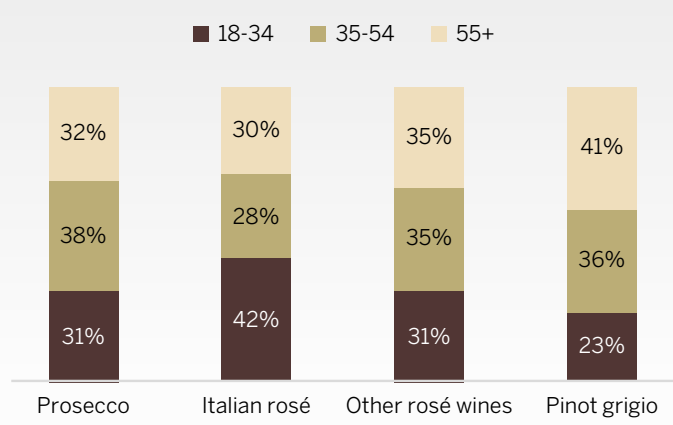


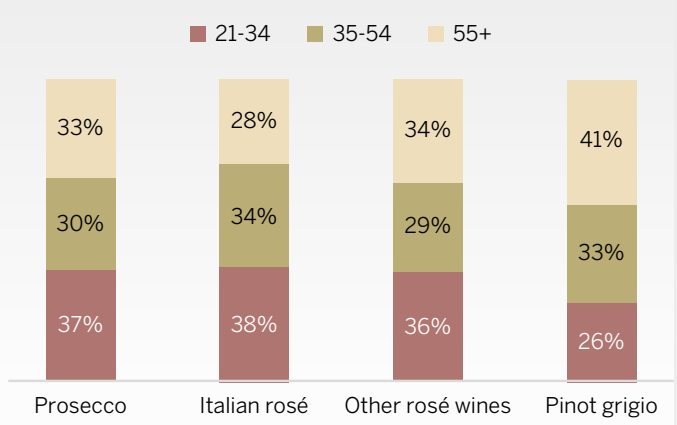




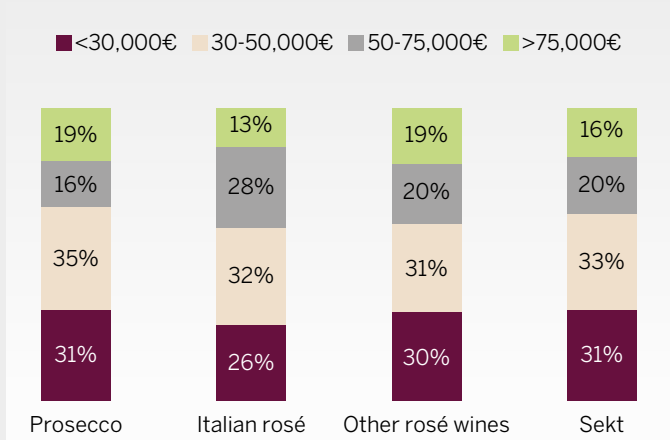
CONSUMERS BY AGE

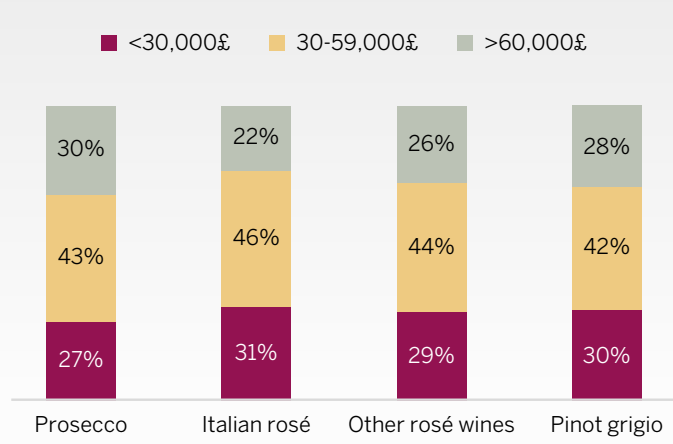


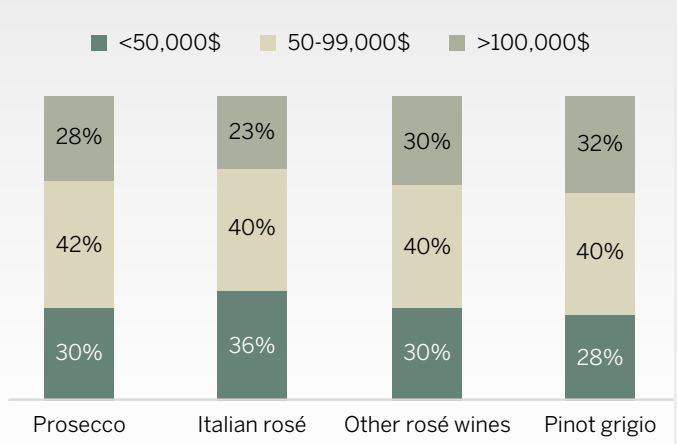




CONSUMERS BY INCOME







An elaboration by the Unione Italiana Vini Observatory based on Wine Intelligence's data

VINEYARDS & CLIMATE CHANGE

A new instalment of our investigation topic of the year, dedicated to climate change in the vineyard and cellar. In light of the effects of climate change, **ROSÉ WINES AND MORE SUITABLE AGRONOMIC DECISIONS** *are key players for obtaining products with high and constant quality standards*

AN INTERVIEW WITH MATTIA VEZZOLA, WINEMAKER AND VICE PRESIDENT OF THE VALTÈNESI CONSORTIUM (LAKE GARDA)

ROSÉ. WE NEED A DEDICATED VITICULTURE TODAY MORE THAN EVER

by **CLEMENTINA PALESE**

The keywords are suitability, governing ripening, resilient vines, thanks to deeper root apparatus, and vital soil

To obtain quality still rosé wines, it is essential to choose varieties suited to top winemaking territories and then control ripening on very fine balances between leaf surface area and fruit production, to guarantee adequate acidity. To do this, we need to start with varieties that are resilient thanks to agronomic management practices that hinge on deeper root apparatus in a vital soil.

"To make a rosé with a very high and, above all, constant quality standard, it is essential to use dedicated viticulture, even more so in times of climate change," **Mattia Vezzola**, Bellavista's winemaker, strongly underlines.

He is passionate about the rosé he produces in his Costaripa winery in Moniga, in Valtènesi (he is also vice president of the consortium).

"We need to work the vineyard to make grapes destined for a sparkling wine, like a traditional method," he said. "That is, we must adjust production to a suitable level, with plants that genetically present slightly larger berries, with a reduced skin/pulp ratio that enables us to extract as little colour as possible. In other words, to make a quality rosé, you have to start by choosing a clone that has suitable characteristics and not make rosé wines with partial skin contact with red wine grapes that 'aren't up to scratch'. It has taken 100 years of genetic selection to obtain small berries and maximise the skin/pulp ratio to make great reds. And yet, to give an example, Chardonnays in Burgundy are genetically different from those in Champagne."

Suitable Soils And Climates

It needs to be pointed out that genetics must be suitable for the winemaking aim of the grapes and the territory must be suitable for the specific wine type. These are basic conditions for quality viticulture, which are sometimes overlooked, but cannot be disregarded in the face of current climatic change.

"Rosés, like all wines, need suitable soils and climate, like those in Provence and Lake Garda, which are similar," Mr. Vezzola continued. "In fact, vine growing on the Brescia side of Lake Garda was created by Pompeo Molmenti in 1896. He called two French winemakers who, once they had verified the soil structure and microclimate, agreed on the planting of vineyards for making rosé wines. On the other hand, Lake Garda, with olive and lemon growing and plants like agave, bougainvillea and palm trees, is the most northerly place in the world with a Mediterranean climate. I want to underline that suitability is not a fantasy. It means that in a suitable territory the crop turns out well in nine years out of 10, whether it is tomatoes, radicchio, cherries, peaches or vines. This is why they make Barolo in Barolo, Barbaresco in Barbaresco and Brunello in Montalcino. You can make anything anywhere, but with different results!"

Therefore, Lake Garda is a kind of oasis where climate change is "softened" by the mitigating effect of the water covering a surface area of 370 square km, which has a minimum water temperature of 7 degrees centigrade, with temperature inversions that determine morning and evening breezes.

"However, the effects of global warming can still be felt," Mr. Vezzola pointed out. "And they are tackled with vineyard management that puts plants in the optimum conditions to defend themselves against extreme events caused by climate change. And this is where genetics comes in again, or rather epigenetics linked to adapting DNA to the environment. Our grandfathers took the best buds from plants that their fathers, in turn, had chosen from the best buds. Therefore, in 100-150 years you can select individuals that are perfectly adapted to a specific environment."

Vineyard Management To Avoid Plant Stress

Adapting plants to the environment is another aspect of suitability, however the biological processes – like the adaptation of plants to the soil and climate – take longer than the rapid climate change that we are currently witnessing.

"This is why it is essential to adopt vineyard management that avoids plant stress as much as possible," the winemaker said. "This is only possible if the vine has a root apparatus that reaches deep down, giving the plant autonomy in searching for water and nutrients. To achieve this result, the land has to be worked, which means an increase in the hours of work per hectare. Then, to produce constant quality, we need to select the shoots, which needs 110 hours per hectare. So, we go from 130-150 to 400 hours of work per hectare, which increases labour costs. Moreover, it requires expertise, not just time. After 15 years, a mechanically-worked vineyard has a root apparatus that is more developed by 30 percent than one that is weeded or grassed over. In simple terms, this means it has 30 percent more capacity to resist water stress. How come a vine in upper Rioja in Spain can live for 90 years without irrigation? Firstly, there's genetics, then there is the fact that for us Italians, the vine's "adolescence" only lasts for 3-4 years, then we consider it adult and self-sufficient, seeing that it already produces. In vine growing in the past, this stage lasted 10 years! To educate the vine to manage its own self-defence, we mustn't get it to produce for the first three years, then 40 percent in the 4th year and 70 percent in the 6th year. Every territory has its own theories and experiences, but the rule is not to push production until the vine is suitably structured. Much attention needs to be paid to the soil to make it vital again and make sure use of nitrogen fertilizers is never excessive, and organic. After 30 years of exclusively using mineral fertilizers, life forms present in the soil decrease from about a thousand to a few dozen. The soil needs to be reactivated and left to rest between vineyard pull-outs and replanting; I don't mean four, but at least two winters, taking care of the soil in the meantime. And this increases costs, too. Therefore, agronomic management must be intelligent and sustainable in order to prolong the life of the vineyard. How come those planted by our grandfathers live for 80 years while those we plant only last 30? We have been using biodynamic management for about eight years: the positive effects on the soil can be clearly seen from the supply of humus, as well as on the vineyard's ecosystem and the vines' resilience to various adversities."

Avoid Phase Shifts Between Ripenings

The effects of global warming are particularly felt in the phase shift between technological and phenolic ripening.

"In the case of rosé wines, to contrast this range," Mattia Vezzola explained. "With the same planting density and spacing of 5-5,500 vines per hectare, we need to stay about 10-15 percent below the limits imposed by the production regulations. For example, 85-90 quintals/hectare out of 100. This translates into richer pruning, leaving a couple more buds per vine. To avoid the effects of climate change, the harvest tends to be done earlier, so as to avoid a different canopy management, with a perfect leaf apparatus and 4-5 square metres of leaves per kilo of grapes. These are very fine balances: to put ripening back even by just one week and to obtain more freshness, we need to reduce the leaf apparatus a little and slightly increase production. I'm talking about half a kilo per vine: for example, if a bunch of Chardonnay weighs 120-130 grams, this means that every vine must produce 2-3 more bunches. The leaf surface area needs to be reduced harmoniously, not just by removing leaves in the bunch area, but evenly over the whole canopy to reduce photosynthesis and shift the ripening curve, i.e. the balance between sugars and acids. This is true for every variety and changes all wines. Then, of course, it's necessary to bear the microclimatic conditions in mind. For example, in a windy area, like near the sea, the grapes dry out more, leading to an increase in sugar concentration that doesn't go hand in hand with phenolic ripening."

Climate change has already determined a half degree increase in alcohol content. Therefore, wines are warmer, rounder and more pleasant.

"In any case, the grapes should be picked when ripe," Mr. Vezzola said. "Rosés need neither concentration nor diluting, they are well-orchestrated, elegant and polished and play on balance. In the cellar, half a degree more doesn't upset the wine's characteristics. For still rosé wines, quality and, above all, the constancy of the winery's style, can be obtained through blending. Therefore, fermenting grapes from the different vineyards separately and then assembling wines to recreate the winery's style through the cuvée."

Orizzonti s.r.l. | Via Rodolfo Morandi 5 - 40026 - Imola (BO) - ITALY | Ph. +39 0542 643982 | email. info@orizzontimacchineagricole.it

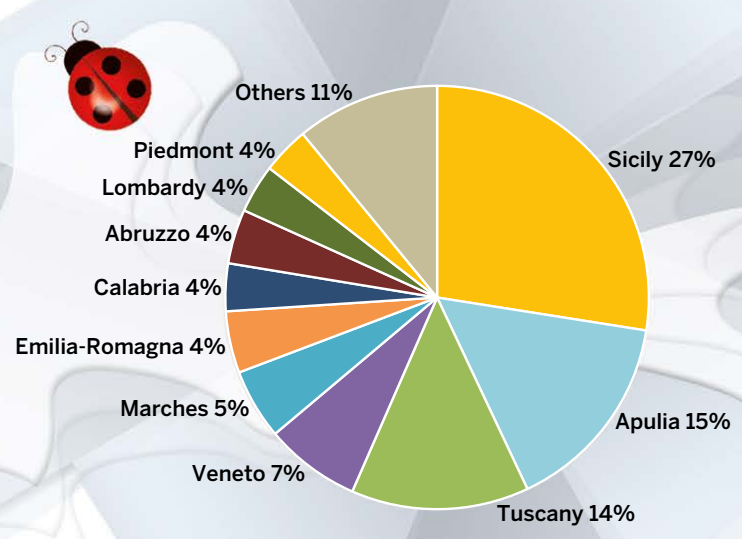
www.orizzontimacchineagricole.it

ITALY: THE ONGOING EVOLUTION OF THE ORGANIC VINEYARDS GEOGRAPHY

THE 2019 BALANCE

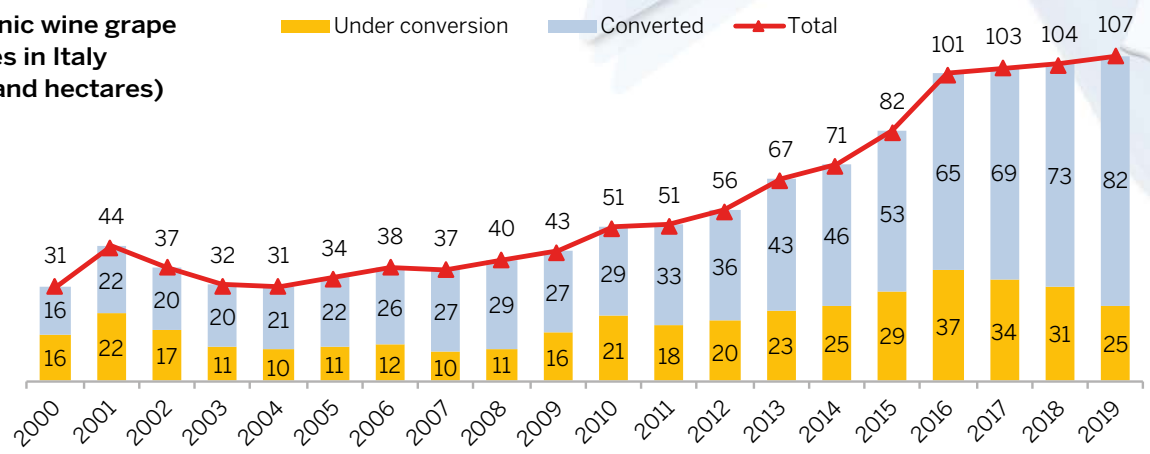
The figure has now been consolidated. In the past three years, southern regions have come to a halt, while northern ones are growing, especially Veneto, Emilia Romagna and Piedmont. Today, a quarter of the vineyards are in the north, while five years ago the figure was 14 percent. In 2019, surface areas stood at 107,000 hectares, 16 percent of the national total

by **CARLO FLAMINI**



2. Organic wine grape surfaces: % share by regions on total (2019)

1. Organic wine grape surfaces in Italy (thousand hectares)



Organic vineyards are on the rise, but the pace has changed as well as the geography: less in the south, more in the north seems to be the latest trend, inferred from both the number of conversions and, above all, from the vineyards that have obtained organic status. Veneto, Friuli Venezia Giulia, Emilia Romagna and Piedmont are the candidates for becoming the regions driving Italian Organic 2.0.

Let's take a look at the figures. In 2019, organic surface areas in our country rose to 107,000 hectares, 3000 more than in 2018, with an impact on total national vineyards of 16 percent *(figure 1)*. Certified vineyards have increased by about 9,000 hectares to 82,000, while conversions have slowed down for the third year running, to 25,100 hectares.

Most of the organic vineyards are concentrated in Sicily (27 percent), followed by Puglia (15 percent) and Tuscany (14 percent), while Veneto bursts into the rankings with the largest annual growth (30 percent), reaching a quota of 7 percent of the national figure *(figure 2)*. Umbria (+21 percent), Friuli Venezia Giulia (+18 percent), Emilia Romagna and Piedmont (+15 percent) are also on the up, while the top three are falling or at a standstill: Sicily -2 percent, Tuscany -1 percent and Apulia *(figure 3)*.

As for the effect of organic on regional vineyards *(figure 4)*, if the national average is 16 percent, we find seven regions above this, with the highest being Calabria at 37 percent, while Veneto is well below the average at 8 percent. This factor can be explained by the parallel growth of regional vineyards in recent years, therefore the increases in organic vineyards are truly vast.

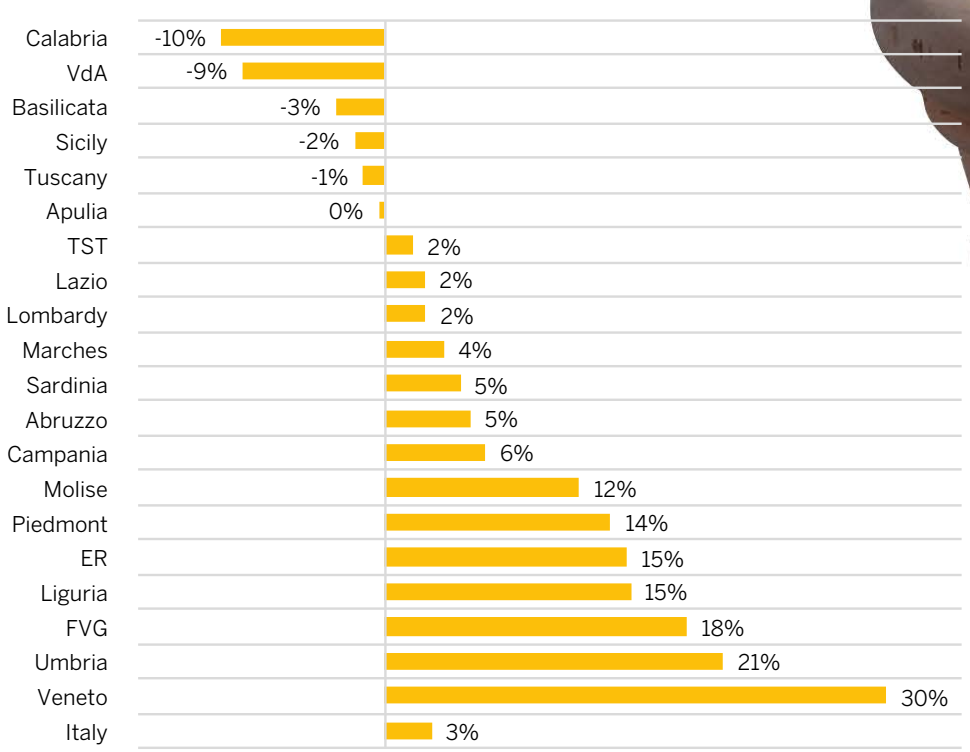
Long-term Trends

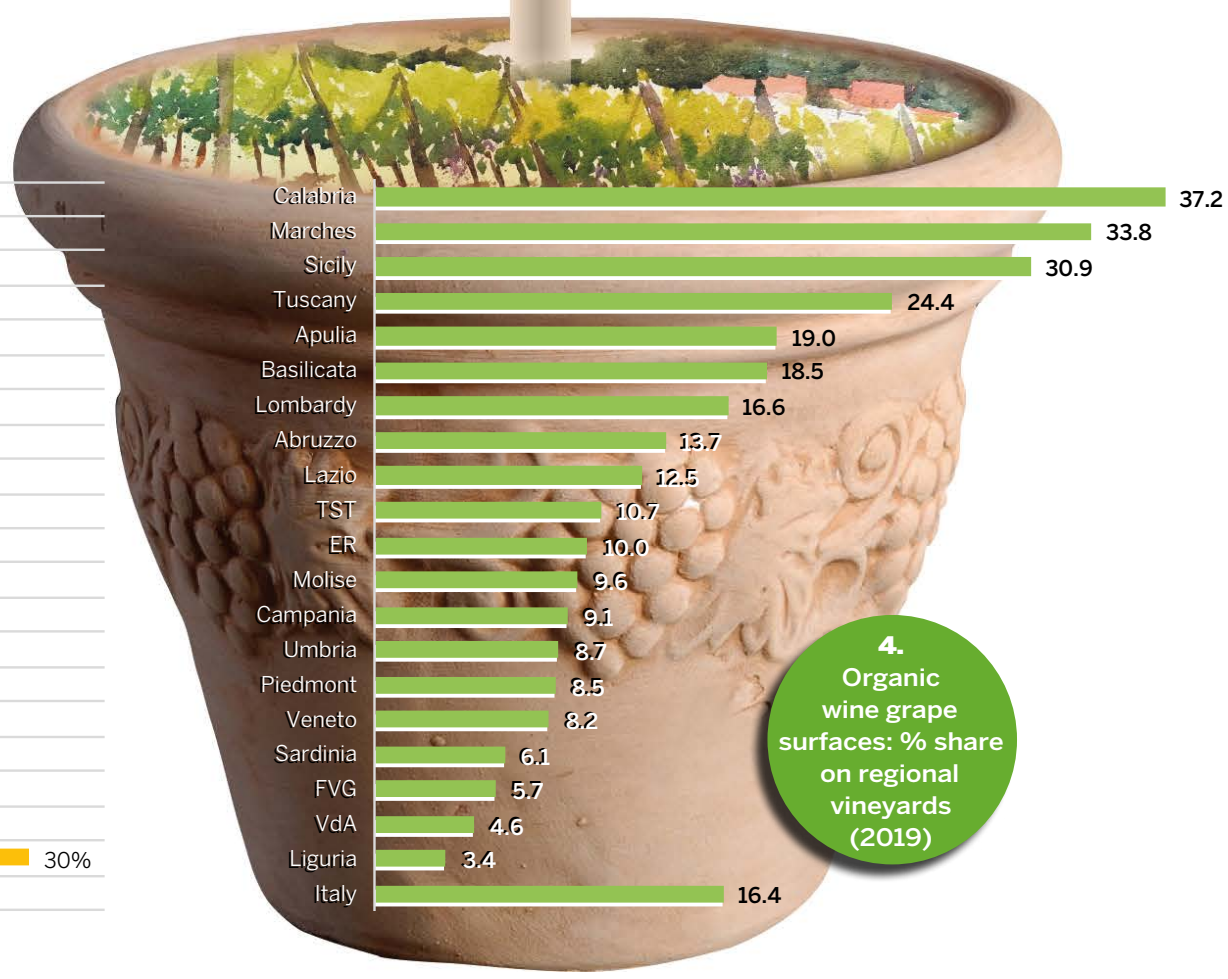
If data from the last year appears to highlight the changing pace of organic, the one from the medium-term adds something more. Their geography is changing, too *(table 1)*. If growth was stable at around +8 percent during the five-year period 2010-2014, with just the northeast overperforming because it came from a smaller base (just under 2,000 hectares), the evolution changed during the next five-year period *(figure 5)*. The northeast, driven by Veneto, brought growth to 19 percent, more than doubling the Italian average of 7 percent, the northwest confirmed the double-figure trend (+14 percent), while the centre was at a standstill and the south halved its growth from 8 percent to 4 percent.

Even more significant is the figure from the last four years, which have dictated the real turning point *(figure 6)*. The northwest and northeast are currently on the up, with the last two years in front-wheel drive, especially for Veneto, Emilia Romagna and Friuli, with increase peaks of over 20 percent per year between 2018 and 2019.

The figures for the central regions are completely different, falling from +12 percent in 2016 ➔

3. Organic wine grape surfaces by Regions: % change 2019/18





4. Organic wine grape surfaces: % share on regional vineyards (2019)

ENOMECCANICA BOSIO

Inside every great bottle
there is always great technology

enomeccanicabosio.it

info@enomeccanicabosio.it
+39 0173 290922

to a meagre +1 percent in 2019, dictated by a regression of vineyards in Tuscany, which have been at a standstill for the past two years now, on the threshold of 15,000 hectares, compensated by growth in Umbria and Marche. The southern area and islands, on the other hand, have been in the negative for three years, with a strong decrease in Sicily and stagnation in Apulia, along the lines of 17,000 hectares, elements only partly compensated by the recent development of vineyards in Abruzzo (above 4,500 hectares).

The Changing Geography

Due to these different trends, the weights of the various areas are changing *(figure 7)*. In 2010, the northeast stood at 9 percent of the total, a quota that jumped to 15 percent in 2019, just as the northwest went from 4 percent to 7 percent. This relieves the weight of the south, which went from holding about two thirds of the total until 2014, to 56 percent today, while the centre remains stable with a share of around 22 percent.

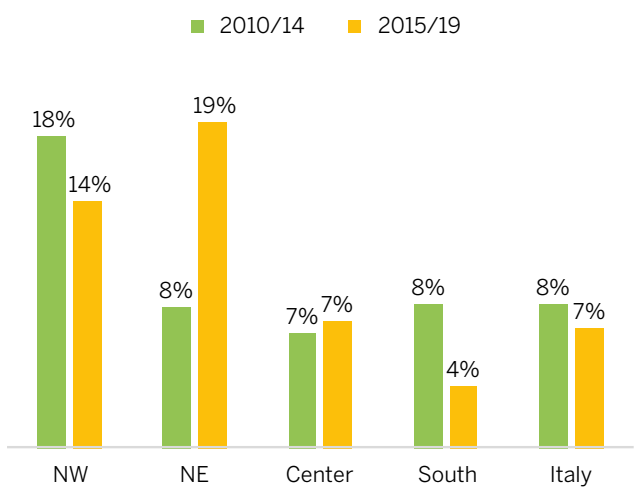
Certainly the low performance of southern regions in recent years has been affected by administrative hiccoughs in regional development programmes, as we already reported last year, commenting on 2018 data *(figures 8 to 11)*. This is a sign that organic vinegrowing can be done if it is within the context of public funding, which compensates the accessory charges of this practice. Whereas in the north, where organic is certainly more difficult due to different weather conditions (added to this, the reduction in the use of copper dictated by EU rules), the decision seems to be totally convinced, also driven by the decisions of some consortia (see Prosecco DOC) to reward this production by granting new entries into the register or less incisive yield reductions in certain vintages. Therefore, a "reward" machine that goes beyond simple funding of regional development programmes, in addition to the setting up of organic districts (Venice, Padua, etc.) that add a sense of community linked by a production aim, seems to have given the right impulse to vinegrowers to make the organic choice for life," a factor that can explain the growth registered in these areas in recent years.

Table 1. Organic wine grape surfaces* in Italy by regions (hectares)

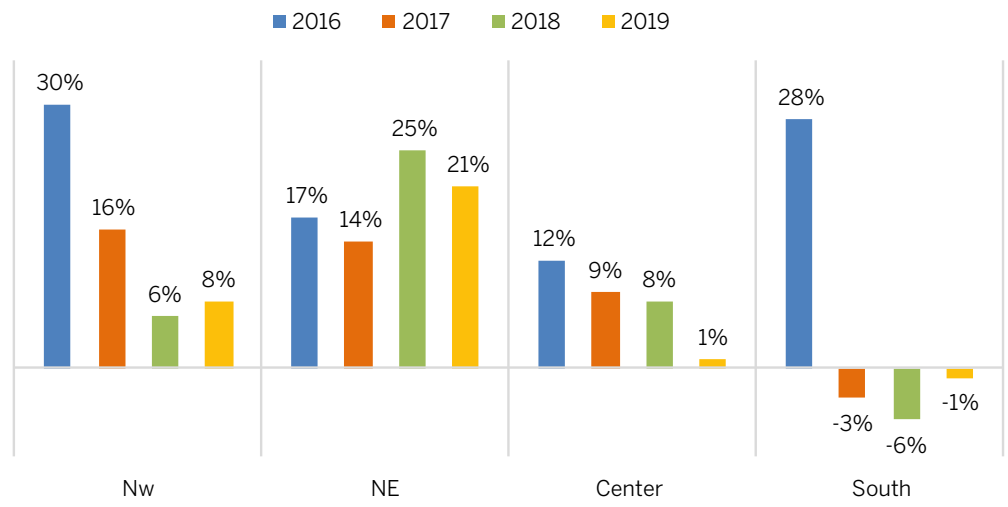
Region	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019/18 % change	Cagr 2010/14	Cagr 2015/19
Liguria	46	44	40	37	33	29	36	41	47	54	15%	-8%	17%
Valle d'Aosta	4	13	15	19	22	22	22	28	23	21	-9%	53%	-1%
Lombardy	936	1,114	945	1,197	1,947	2,664	3,214	3,680	3,957	4,055	2%	20%	11%
Piedmont	900	947	1,042	1,254	1,681	1,998	2,845	3,331	3,469	3,945	14%	17%	19%
Friuli V.G.	376	390	495	709	571	707	1,033	1,127	1,352	1,600	18%	11%	23%
Veneto	1,834	2,075	2,363	2,405	2,718	4,003	4,493	4,728	6,124	7,990	30%	10%	19%
Emilia-Romagna	2,192	2,292	2,446	2,574	2,580	2,460	2,963	3,704	4,497	5,158	15%	4%	20%
Trentino-S.T.	452	465	612	477	797	985	1,058	1,362	1,647	1,675	2%	15%	14%
Tuscany	5,999	5,036	5,887	8,748	9,243	11,556	12,832	13,477	15,059	14,857	-1%	11%	6%
Lazio	1,936	1,832	1,800	1,519	1,643	1,673	2,008	2,453	2,239	2,293	2%	-4%	8%
Marches	3,287	3,303	3,278	3,787	3,752	4,120	4,863	5,325	5,682	5,885	4%	3%	9%
Umbria	631	2,864	3,569	740	772	796	673	915	900	1,085	21%	5%	8%
Sicily	17,110	15,577	16,144	25,153	27,105	32,297	38,935	35,939	30,660	30,084	-2%	12%	-2%
Apulia	8,365	8,004	10,173	10,604	10,269	10,866	15,990	16,327	17,024	16,952	0%	5%	12%
Calabria	2,003	2,134	2,184	2,355	3,128	3,206	4,223	4,443	4,425	3,983	-10%	12%	6%
Abruzzo	3,694	3,725	3,699	3,385	3,559	3,629	3,862	3,955	4,322	4,546	5%	-1%	6%
Campania	708	742	772	706	682	803	1,414	1,505	2,065	2,191	6%	-1%	29%
Sardinia	746	1,261	970	1,269	996	964	1,558	1,611	1,538	1,608	5%	7%	14%
Basilicata	727	662	609	708	561	539	1,064	993	959	930	-3%	-6%	15%
Molise	327	330	304	291	303	326	459	440	457	511	12%	-2%	12%
Italy	52,273	52,812	57,347	67,937	72,362	83,643	103,545	105,384	106,446	109,423	3%	8%	7%

** table grapes included*

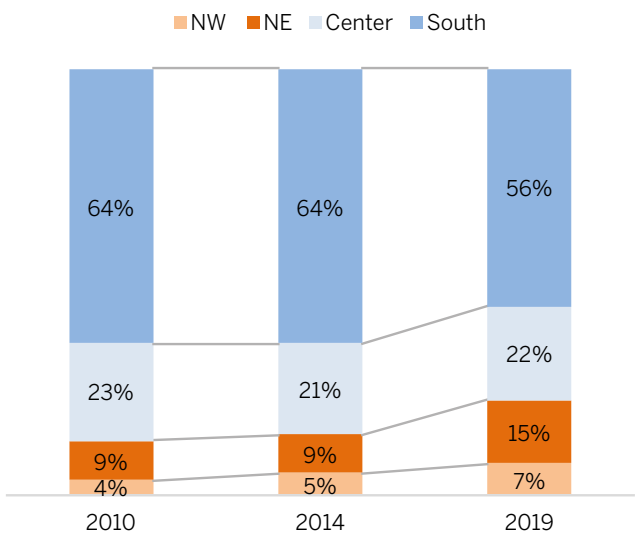
5. Organic vineyards growth by areas - Cagr %



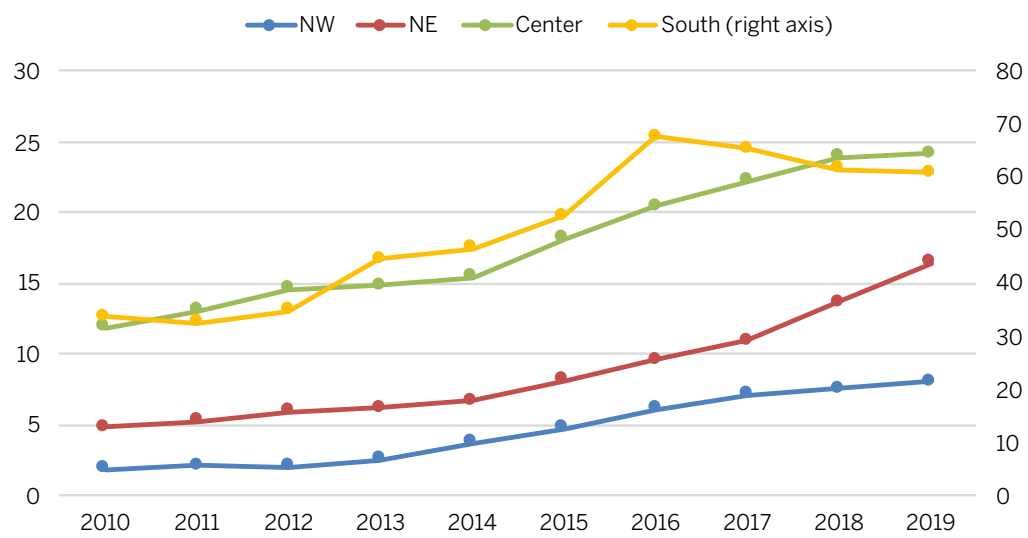
6. Annual % change by areas



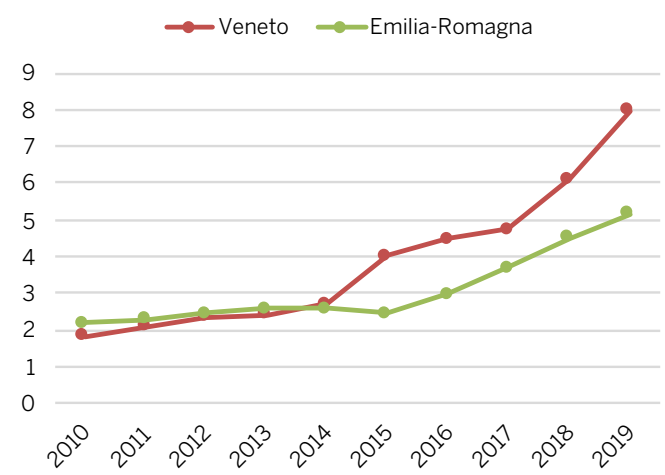
7. Organic surfaces by areas



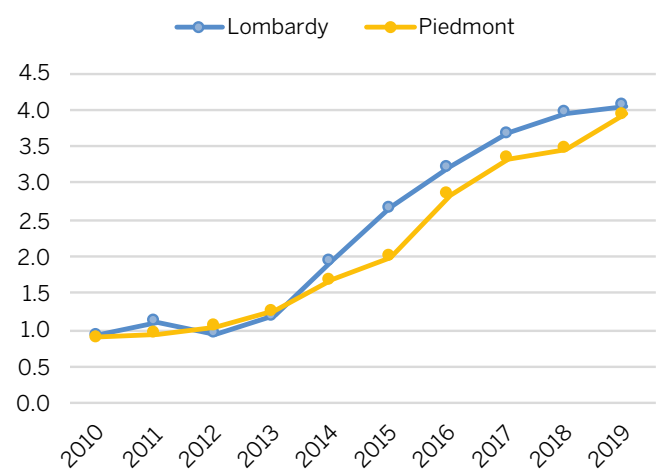
8. Organic surfaces by areas (thousand hectares)



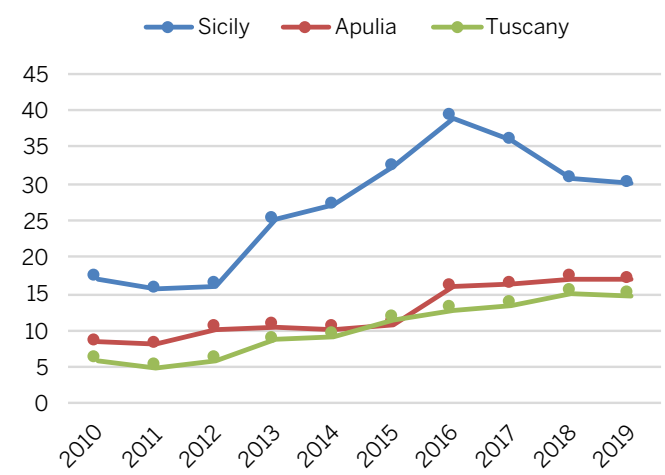
9. Veneto and Emilia Romagna (thousand hectares)

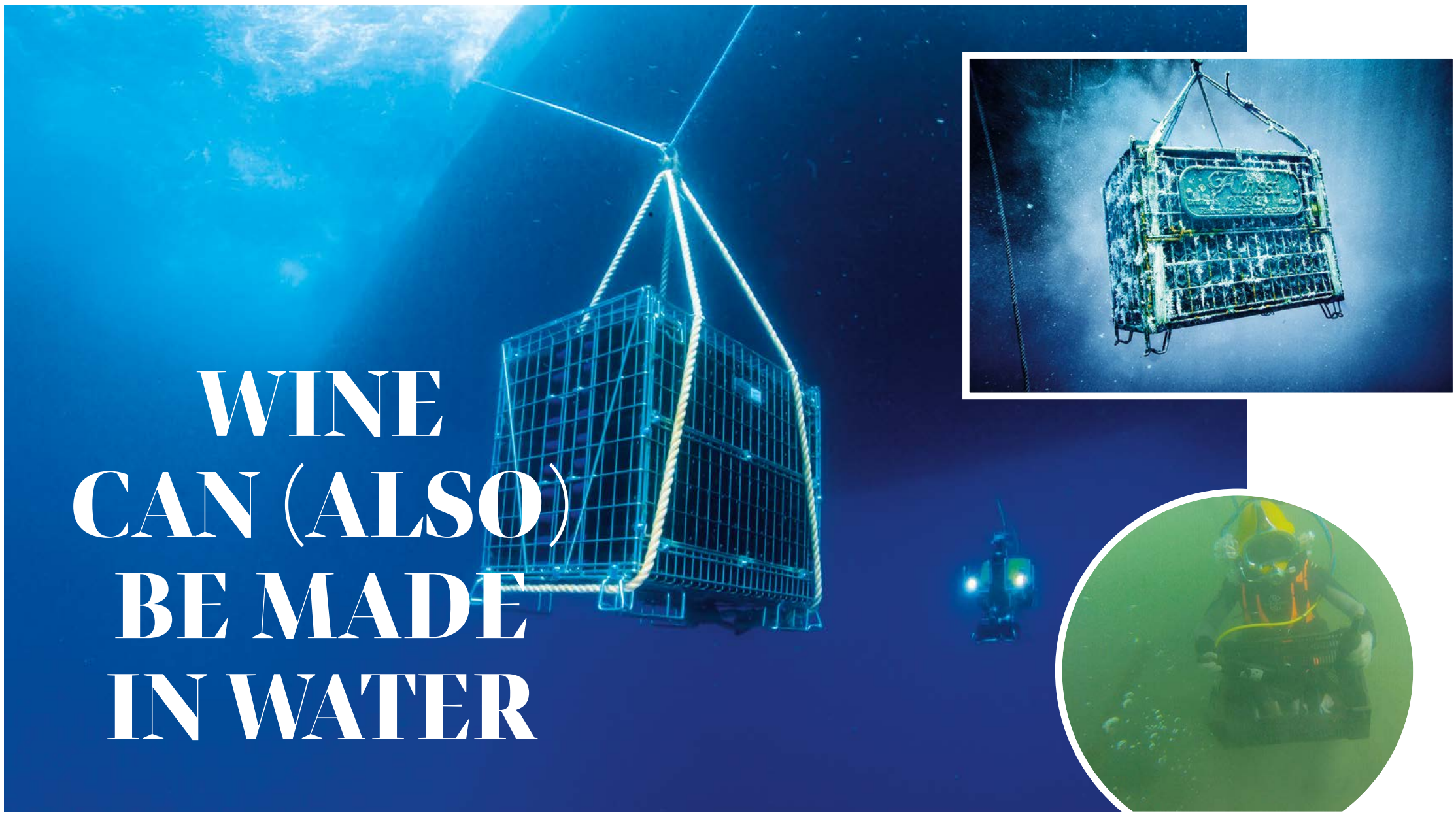


10. Lombardy and Piedmont (thousand hectares)



11. Tuscany, Apulia and Sicily (thousand hectares)





WINE CAN (ALSO) BE MADE IN WATER

by **FABIO CIARLA**

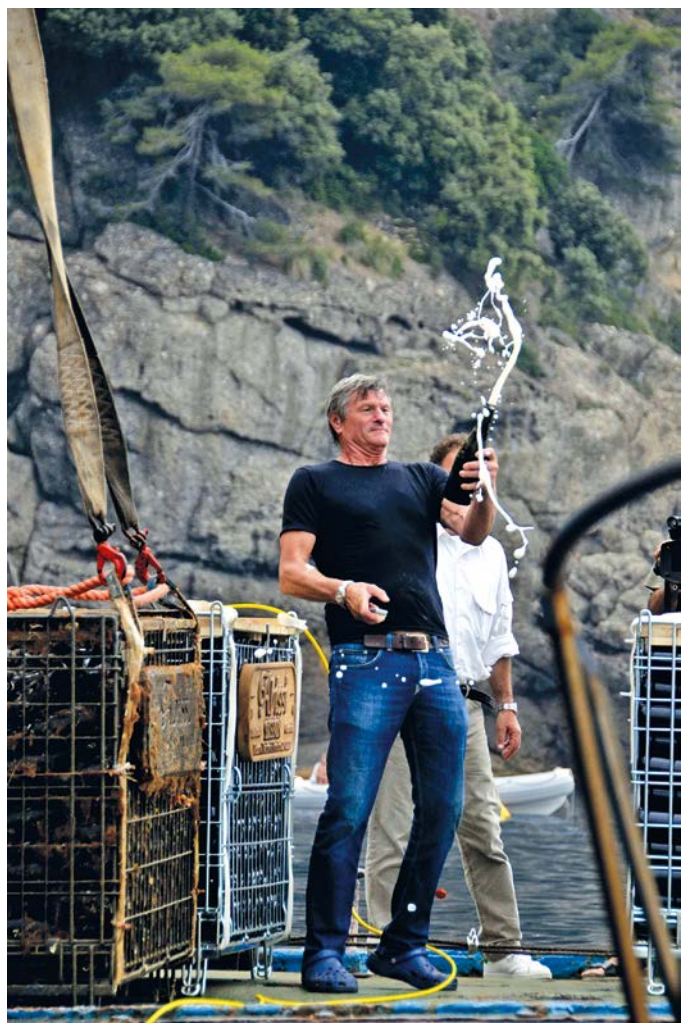
Mostly in the sea, or a lake, underwater ageing has gone from being a simple experiment to an established practice with potential for development. Just a passing fad? Maybe not, although there are just over 30 experiences like this today. Europe plays a leading role and Italy ranks first among the various countries.

Mention wine and sea and the mind leaps to transport of the ancient Greeks and Romans, but in that case, we can talk exclusively about the power of suggestion and archaeological research. However, if we follow the course of history up to about the mid-nineteenth century, we can date with relative certainty the oldest bottles of Champagne ever found at the bottom of the sea and, moreover, they were drunk. It is the story of a fortuitous find and a lucky one for wine enthusiasts. In 2010, some local divers off the Åland Islands, between Sweden and Finland, were searching for the wreck of a German ship that had sunk in the area. Luck came knocking at the door of Christian Ekström and his friends, who found a boat at a depth of about 40 metres in the freezing waters. They couldn't work out whether it was the one they had been talking about on the nearby islands, but they noticed some bottles and decided to bring some to the surface. The ascent, or the desire to try the content, made the first cork pop and, to their great surprise, there was a still drinkable Champagne inside instead of salt water. They found out later that this sparkling wine had been preserved for about 170-180 years and still had a lot to say for itself, but how was this possible? There are several complex answers to this question, it's all about chemistry and above all physics, with some details still unknown. Needless to say, thanks to this discovery in the Baltic Sea, subsequent sea-ageing experiments focussed on sparkling wines – including the LVMH group owned by Veuve Clicquot (one of the Champagnes found in 2010), which set up "The cellar in the sea" – though there is no lack of still wines, grapes being immersed before fermentation and even ageing of tonneau barrels immersed in sea water (South Africa).

A Question of Osmosis

A ground-breaking experiment in Italy, and possibly the most famous and widespread product of this type, is the Abissi sparkling wine from **Pierluigi Lugano**'s Bisson winery. An incredible coincidence marked 2010 both as the year of the fortuitous finding of the Baltic sea wines, as well as the re-emergence of Bisson's wines from the bottom of the Ligurian Sea (the first sparkling wine, the 2008 vintage, was immersed in May 2009 and "fished out" in 2010). For Lugano it was the practical application of a planning stage set up in the early 2000s. His idea took shape from the combination of his being an expert in figurative art, a history enthusiast, sommelier and wine producer since 1978. It's a fweddiascinating story which brings together the parable of the Wedding at Cana, the importance of wine for the Romans, the first finding of wine amphorae in caves and then (thanks to an underwater breathing apparatus invented by Leonardo da Vinci) in the sea. While the former, those discovered on the surface, had dried up over the centuries, those found in the sea or lakes had retained their content more or less intact.

"At the end of a long study, I understood that everything takes place through osmosis," Pierluigi Lugano explained to us. "On the earth, the process subtracts liquids from organic bodies through oxygen dissolved in the air, while in the sea this doesn't occur due to the low presence of oxygen. This reflection made me realise that the sea could be the perfect environment for preserving sparkling wine, the type I had decided to produce right from the start. More than twenty years have passed since that awareness until the current realisation, and I have studied in detail all the solutions in order to carry out my project in that environment. I mean corking, all the ideal temperature variants, depth... It was a very in-depth study until 10 years ago when, after a ten-year study period, I managed to launch my project, which was successful thanks to the invaluable collaboration of winemaker Enzo Michelet from Conegliano Veneto."



Above, Pierluigi Lugano of Bisson Vini; bottom right, Attilio Scienza

In the opening photo above, the immersion of Jamin Portofino wines; in the box, Bisson Vini's Abissi sparkling wine and, in the circle, Roma DOC wines from the Monte Due Torri winery transported to the bottom of Lake Nemi

In detail, the Abissi sparkling wine is made by immersing bottles of sparkling wine in the sea, in the Baia del Silenzio in Sestri Levante. The wine has already undergone bottle fermentation, so that temperature changes due to immersion don't block the process. The bottles are placed in large metal cages designed by Lugano, with closures that, according to his studies, best resist corrosion: crown caps.

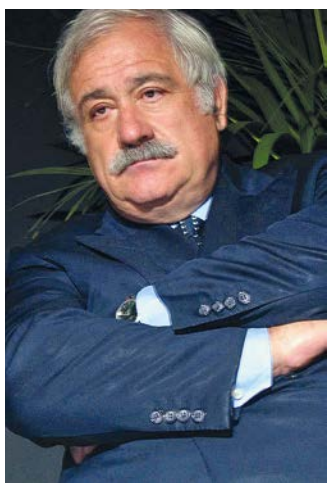
"I personally adopted a strategy based on studies of every single bottle," Mr. Lugano said. "The aim was to propose a packet of solutions to bodies that had to authorise the project, covering every detail and able to dispel any doubts about the part in the sea and afterwards, especially from a health point of view, when we put bottles on the dinner table encrusted with sea deposits. It would appear today that some do not take this field seriously enough: the risk is that the whole branch of water ageing could burst like a bubble, involving everyone (including those who do a good job) if there should be health warnings for a product put on the market with disregard. I prefer not to be associated with certain improvised and risky projects."

Pierluigi Lugano has a clear vision but is also concerned at times. After earning the approval of much of the world press when tasting the first bottles pulled out of the sea ten years ago, he was given the satisfaction of being invited to the international congress in Bilbao, at the end of 2019, to talk about his experience and add to the debate on the topic.

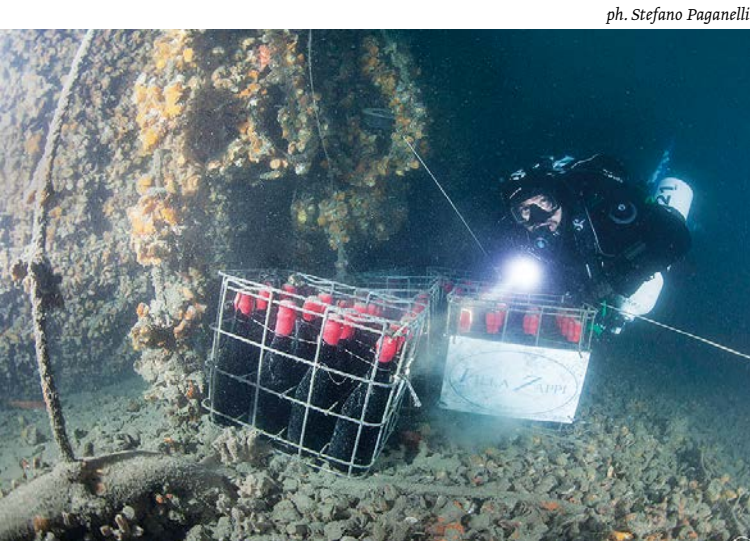
The Role of Oxygen

To give the question a scientific slant, we spoke to the professor and world-famous expert, **Attilio Scienza**, who highlights the role of oxygen on the sensory aspects of sea-aged wines, "validating" in a certain sense the premises of Lugana's research.

"We had the first confirmation with Madeira and Port wines found in the hold of some Dutch and English galleons that sank in the sea," Mr. Scienza ex-



ph. Stefano Paganelli



Top left: Tenuta Casali wines; top centre: Vallecamonica's resting on the bottom of Lake Iseo; top right: Bringing Cantina del Garda's Brezza Riva Riserva to the surface, which had been resting on the bottom of Lake Garda. Here-above a bottle of Tenuta del Paguro

THE PHENOMENON OF UNDERWATER WINES (BOTH IN THE SEA AND LAKES)

About *32 producers*, *8* of which *produce exclusively sparkling/semi-sparkling wines*. The main countries (in order of importance): France, *Italy*, Spain, Croatia, Greece and South Africa

plained. "When tasting these wines, we realised that, though two or three centuries had gone by, they still displayed a certain freshness, not having suffered excessive oxidization. The same sensations were perceived in wines found in wrecks from the first and second world wars, a phenomenon that can be explained paradoxically by thinking of the highest summits of emersed land. At high altitudes, the rarefied air lacks oxygen, just like at 40 metres under the sea. It is precisely this absence of large amounts of oxygen, an element that over the long term has always had negative effects on wine, that allows products immersed in the sea to be preserved better and for longer. In technical terms, it means that in the sea these bottles undergo a lower redox reaction, a potential of oxidoreduction, than those preserved on land. Therefore, immersion in the sea goes from being a simple mode of preservation to, in some cases, part of the development and winemaking process, like for some sparkling wines, where as well as the role of oxygen, there is also a constant temperature."
Another often-quoted aspect is that of the continual movement caused by the tides and currents.

A selection of the winery's sea-aged wines; bottom: Silvia Casali, from the estate of the same name, together with her family

"I can't exclude that there is an influence like remuage on sparkling wines," Mr. Scienza added. "But in the absence of oxygen it is limited, given the low yeast activity. In any case, it is a territory to be discovered and investigated, also because it arouses a lot of curiosity and, in today's wine world, we need to know how to embellish quality by adding a story."

Native Varieties

From Liguria to Romagna, from the Tyrrhenian to the Adriatic, we find two different expressions of sea ageing linked by a common thread: native varieties. Tenuta Casali is situated in Mercato Saraceno, not very near the sea, but the idea of sea ageing came from friends and clients from Dive Planet in Rimini. The Rimini diving centre discovered the wreck of the Anni cargo ship, which sank 25 miles off the coast, and obtained a 20-year government licence. Knowing the wines of Tenuta Casali, the idea came about to try ageing a few bottles in the sea, a complicated process seeing that the bottom of the sea in that area reaches 53 metres in depth.
"Thanks to these trials," **Silvia Casali** explained. "We observed a considerable difference when simultaneously tasting bottles aged for a year in the sea and those from the same batch kept in our cellar. Therefore in 2017, we thought it might be the case to go further. We immersed the first 230 bottles to be sold, thanks to which we had excellent feedback. Given this success, we decided on a specific project, dedicated exclusively to sea-ageing a non-disgorged traditional method sparkling wine made from off-the-skins fermentation of Sangiovese grapes. The conditions of the sea, (darkness and constant temperature, as well as the continual movement of the sea causing remuage, moving the yeasts up and down) are unattainable in the cellar."
The bottles are immersed with the traditional mushroom corks, held in place by a wire muzzle and covered with shellac.
"We have definitely noticed an increase in the finesse of the perlage, as well as a different development on the nose thanks to the dispersed yeasts," Ms. Casali said. "All this, however, while preserving the notes of freshness, sapidity and minerality typical of our territory. Another clear aspect is softness, we have carried out analysis for malic acid to understand whether malolactic fermentation had actually occurred, however, we found not only had it not occurred, but it wasn't even set off by storing the wines in the cellar after re-emerging."
It's impossible to end this focus on Tenuta Casali without explaining why the line of sparkling wines is called Villa Zappi and the origin of the name "Ondina 33" for those aged in the sea. In fact, the use of '*ondine*' (meaning *waves*) has no connection to the sea, but the radio. Ondina 33 was the shortwave radio built by Guglielmo Marconi and taken aboard the Airship Italia during flights around the North Pole, captained by Umberto Nobile, who didn't want this heavy device on board at the start. The radio, however, was fundamental in saving the lives of the occupants of the famous "Red Tent", including Filippo Zappi, from Mercato Saraceno, who lived in the current house of Silvia Casali's grandparents, Villa Zappi.

ROBUSTNESS, RELIABILITY, PRECISION

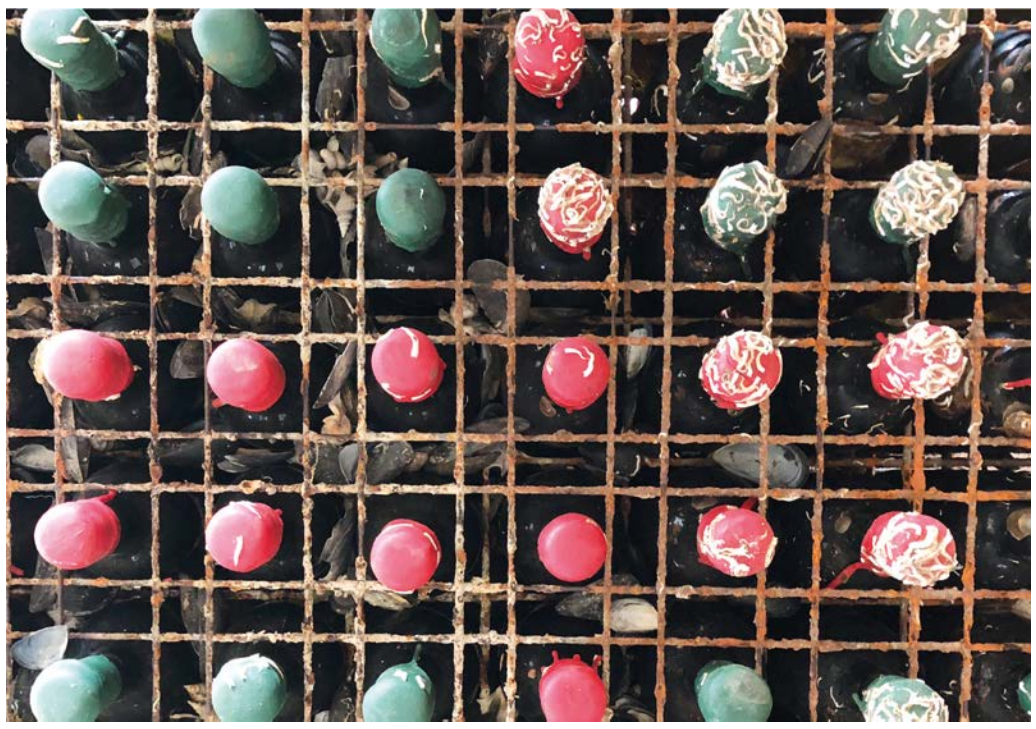
We design and produce tailormade machines and turn key lines for **manufacturing, assembling and cutting aluminium and plastic caps**: highly technological solutions suitable to satisfy any specific need of closures production with a special attention to materials' saving.

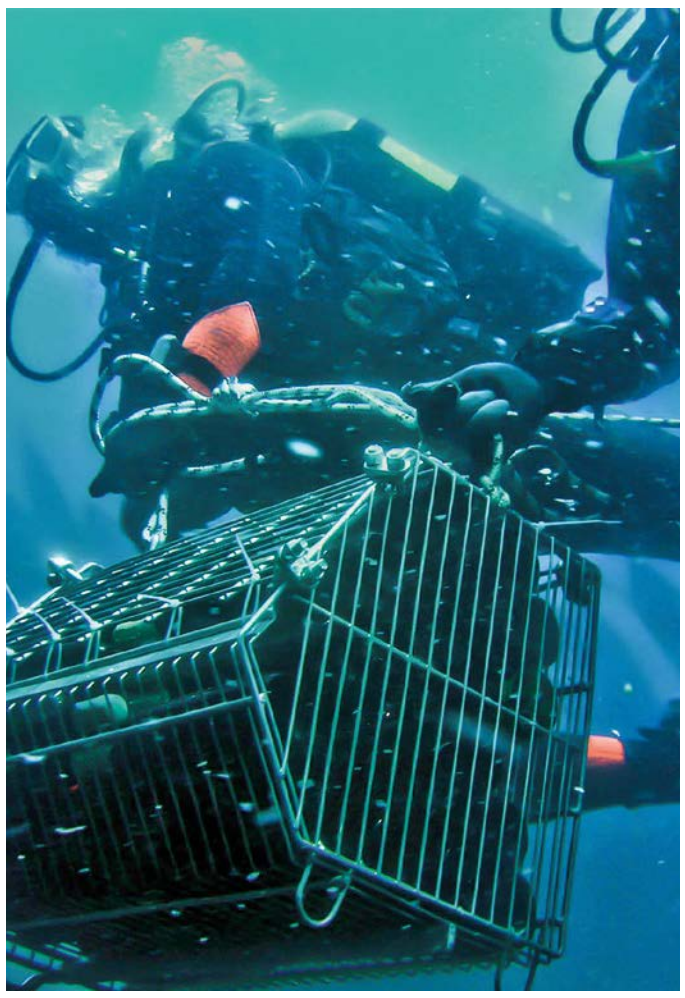
Share with us your projects and what you have imagined will become reality.

MACA
caps making equipment

Discover our full line on macaengineering.com
Contact: info@macaengineering.com

part of
AROL
GROUP





Top left: bottles of Tenuta del Paguro; centre: a moment in the immersion operations of their wines; bottom: Gianluca Grilli from Tenuta del Paguro

And a Historic Approach

In addition to native grape varieties, Tenuta del Paguro and Tenuta Casali have a historic approach in common, as well as the love for their territory. Gianluca Grilli, a physicist by trade, and Stefano Gardi, winemaker, set up an "artistic project" in 2009, which combined farmers' tales and the story of a rig sinking off the Ravenna coast by a special friend, Tonino Guerra.

"When he told me about a sunk oil rig," **Gianluca Grilli** told us."I thought that it was a perfect symbol for the union of Ravenna's past and present history, to be told through wine. When studying this, I realised the many similarities with the 'salty' wine of the Ancient Romans (the wine had small amounts of seawater added to it, Ed.), and the possibility of experimenting a preservation method as well as a winemaking one. This helped the wine to withstand the long journeys it had to face in the Mediterranean, just as the rig, which eventually sank, should have moved around, too."

It concerns the Paguro rig, owned by Agip and used to search for underwater gas deposits, which sank to 35 metres of depth on 29th September 1965, following an accident. Over time it has become an underwater oasis and Grilli-Gardi's still wines rest here for a year. A Sangiovese and an Albana, for the native grapes, as well as a Merlot and a Cabernet Sauvignon, on sale since 2016.

"The strongest sensation that we have had with our wines is an increased roundness," Mr. Grilli explained. "Which marks them out compared to other non-sea-aged wines. Even for the Albana, the most frequent question we are asked is whether it has undergone malolactic fermentation, actually no, and that increase in roundness is due precisely to the ageing. What is happening here is an acceleration in development, the wines in fact take on complexity, while increasing longevity."

Sea and Champagne

In the world of "undersea wines" there is another experience that is causing quite a stir: Jamin Portofino Srl, which combines the sea and Champagne, once again in Liguria, in Portofino. In addition, **Emanuele Kottakhs**, one of the founding members of Jamin, is a friend of Gianluca Grilli and, like him, comes from a different sector than agriculture.

"I deal with creating groups, making networks, and I have tried to do it in this case too," Kottakhs told us (of Greek origin, but very Italian). "My highest aim was to set up a consortium, though I am aware that safeguarding something that isn't an appellation is not feasible. I started off with Gianluca (Tenuta del Paguro, Ed.) and now we have set up an international work group that swaps notes once a month and pools common data and experience. The differences are enormous, from grape varieties to ageing stages to territories, everyone has their own results. The answer to the question of whether the wine improves or not, is that not in every case does the wine improve, but in every case the wine is certainly different, and that is the key for us. The aim is to manage to create a manual/document that defines what it means to make a wine in the sea or a lake, trying to exclude anyone who sees it as just a way to make souvenirs. Those who make wine in the sea can be divided into two groups, as well as thousands of differences, there are those who look at what happens outside the bottle and those who look at what happens inside, our aim is to focus on both aspects."

So, in your case, what bottle are we talking about and what happens inside?

"Jamin was set up by three self-financed founding members as an innovative start-up," Mr. Kottakhs said. "The idea was to work on traditional method sparkling wine, to do this we contacted two great Italian producers who were not interested however, so then we turned to Champagne. We immersed 3,000 bottles in the coastal area protected by Portofino, and presented the first results at the end of 2018, seven years after the studies began. The results were so interesting that we became our own distributors on the market. Getting back to the bottle, what is clear after sea ageing is an increased integration of carbon dioxide, a very fine perlage and a strengthening and acceleration of development. But it is not just about evolution, the element that breaks with tradition is that, while I am making this journey in time, I can also manage to stabilize and perform the internal pressure and the finesse of the carbon dioxide, which diminishes over time outside of the water."

And how do you achieve this result?

"Thanks to a precise strategy consisting of compensating energy masses, isobaric equivalence, ultraviolet and temperature analysis for example," Mr. Kottakhs said. "Ours is a process based on the analysis of the water column present in the area and not replicable in other areas; on the bottom of the chosen area of the sea there is no ultraviolet, there is a constant temperature of 13-14 degrees, a low intensity current of 437 herz that cradles and moves the mass inside the bottles and, above all, at 52 metres of depth we found the perfect equivalence of pressure with the 5.7/7 bar normally present in a bottle of Champagne and in line with ours (about 6 bar). Being a Champagne to all effects and purposes, we can confirm that we are the first in history to use the caption 'underwater' on a Champagne label. We immersed the bottles with the traditional cork closure and, to safeguard health, we applied a shellac and rubber resin capsule, or rather a closure-filter that is part of our patent, which stops microorganisms getting inside but allows micro-oxygenation, though there isn't much oxygen at that depth, which is a good thing. The problems however didn't end there, when the first bottles re-emerged, 1000 exploded because the change in pressure was too sudden. Today the process is divided into three days, with decompression stages similar to those of a diver."

Jamin Portofino's process is full of interesting ideas and seems to be arousing the interest of producers in other Italian winemaking areas, especially Bolgheri, and abroad, like France, but with two different new products.

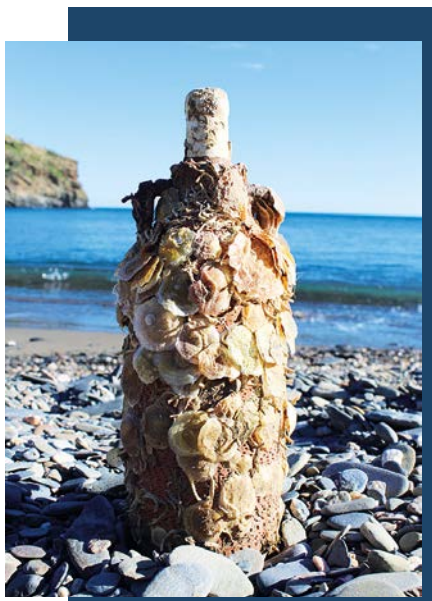
PRICES, PACKAGING, MARKETING STRATEGIES

Sea-aged wines are expensive products, after all, the very high fixed costs of equipment and logistics have to be compensated. Furthermore, as is natural, the products arrive on the market with equally expensive packaging: steel boxes, cases, metal plates, plastic films, etc. The marketing strategies behind these products are obviously aimed at highlighting the importance of the sea element, which is always clearly visible on the bottles, too, by means of the encrustations left (quite rightly) in full view. Prices vary a lot, however, starting from 28-35 euros for Nautilus from Vallecamonica (and rising for future products which will spend 70 months in water) and about 40-50 euros for Bisson's sparkling wines (more common and well-known), stretching to about 80 euros for Tenuta Casali's sparkling wine (distributed mainly on the coast of Romagna), reaching 100-140 with Tenuta del Pagura wines (initially sold more abroad) and lastly, the 225-360-420 euro band for the three wines sold by Jamin Portofino with 12, 18 and 24 months of ageing (the 30-month aged wine will soon be available). The sales system is unusual, too: through free dealers and ambassadors who can vary the price depending on availability, moreover the 24-month wine is not sold to anyone who has not tried the previous ones, and only one bottle of the Privilege series is delivered per order, subject to availability.

Here Emanuele Kottakhs of Jamin Portofino and, further down, a bottle of the winery's champagne

MORE VALUE TO YOUR WINE!

ENOMET IMPIANTI S.R.L. VIA DEI LAGHI, 18/E - CALCINELLI 61036 COLLI AL METAURO (PU) - ITALY
PH +39 0721.897527 / F +39 0721.876108 - WWW.ENOMET.IT / INFO@ENOMET.IT



Spanish winemaker Xavier Cepero and two images of wine bottles that rested on the bottom of the sea

EXPERIENCES ABROAD

Sea-ageing is a niche sector that is developing along precise standards and is trying to combine different experiences. As was done during the first international congress held in December 2019 in Bilbao. This important event also highlighted the importance of the experiences on this subject, defining them as a driving force for winemaking but also for the environment and tourism, and encouraging a distinction between serious activities and improvisations, by establishing precise rules. If Spain, Italy and France predictably lead the sea-ageing project rankings in terms of numbers, other countries are working on very interesting specific projects. In Greece, for obvious historic reasons, but also Croatia, where Marko Duševic has offered to sea-age wines of different origins. Lastly, in South Africa we find perhaps the most extreme case, where they purify sea water and insert it into small wooden barrels.

"Our cellar is the planet," **Xavier Cepero**, the Spanish winemaker heading the small but important experiment off the Catalan coast, in Cala Joncols, summed up. In this tiny, remote bay in the Creus National Park, which can be reached either along an 8-km dirt track or by sea, Cepero and the Gomez family have set up a project based on a small vineyard of one hectare cultivated on crags overlooking the sea, under biodynamic management and resuming the cultivation of several native varieties. Ageing under water began in 2009, and was the consequence of their relationship with the sea. "The project began with a few basic points," Mr. Cepero told us, who we reached with difficulty seeing that the harvest was in full swing. "First of all, the different wines to observe, young and firmly-structured, to study the effects on tannins, then some sweet ones for any saline sensations. Moreover, different closures (cork, synthetic and screw cap) to understand the reaction of each one to the marine environment. A cage to place the wines in, making sure it can withstand the currents and doesn't leave a mark on the seabed when removed, positioned on a seabed that is easy to reach, where there is no risk of damaging the environment during removal. The chosen depth is 17.5 metres, where we have found stable temperature conditions, fluctuating between 11 and 21 degrees, with an average of 16.3, little oxygen, 4.0-3.6 ml/l dissolved in the area, and enough pressure, about 3 bar, so that the closures remain under stress during the experiment. We studied the tides, too, which have an average force of 0.4 metres here, although there are underwater currents during the year, and the salinity of the Mediterranean is 38 percent (35 percent in the Atlantic Ocean), while the established immersion time is 252 days. The experiment came about almost just for the fun of it, mainly to search for new sensations. Today, 11 years after the first sea-ageing, we are continuing along this path because we love the unpredictable behaviour of underwater wines, that new world of sensations that has given us so much pleasure over the years."

Freshwater Ageing

As we have said, sea ageing is not the only solution. Lakes, too, have aroused the curiosity of wine producers, who have set up ageing experiments in fresh water, due to their proximity or historic connections. The first to do so was **Alex Belinghieri**; he started off at his Agricola Vallecamonica winery with interesting raw materials for a traditional method sparkling wine (a vineyard with 60- and 100- year-old plants of different varieties and ancient clones), but without, on the other hand, a place to age the bottles.

"I had read about the finding in the Baltic Sea and Bisson's experiences in Liguria," Mr. Belinghieri told us. "Being near to Lake Iseo, I thought it might be the solution."

After a year studying the bottom of the lake, the 2010 vintage went under water near Montisola.

"It was an ambitious project, with unknown varieties and ageing to assess," he said. "And we started off with 1,550 bottles placed in the water in June with a crown cap after the second fermentation. In addition to absolute darkness and a really constant temperature, there is the added advantage of no loss of internal pressure, thanks to the movement of the water. We are also experimenting with the idea of doing the last part of fermentation in water, which the temperature of Lake Iseo enables us to do. What I have been able to understand in these 10 years of ageing is that, under these conditions, the work of the yeasts is amplified, so it becomes an interesting technique especially for traditional method wines. The yeast lysis is continual, it even lasts longer than the fermentation stage with positive effects on effervescence that becomes more integrated and elegant. From a sensory point of view, the classic notes of yeast, such as crusty bread, are not perceptible, but there is incredible cleanness and the taste is not influenced by the long-term resting on the solids."

And let's talk about the very long time spans, the first immersion of Nautilus sparkling wine lasted for 12 months, then for the second one some of the 5,000 bottles were fished out from 40 metres of depth after 12 months and the rest after 24 months, to see the difference on the same vintage. Then we went to 36 months with the 2012 and 2013 vintages, to see the differences between different vintages, and the next wine to come out will have spent 48 months in water, but one of Belinghieri's ideas includes a 10-year Riserva. Without counting other projects, such as the one on the Piwi variety and another on the Adamadus sparkling wine, a traditional method made with Riesling grapes, aged in an Alpine lake (frozen over in winter). Remaining in the north this year, there is the Lake Garda experiment. Last June 1,216 bottles of what will become Brezza Riva Riserva Blanc de Blancs, a Trento Doc made with Chardonnay grapes from the Riva del Garda winery, were immersed in the lake. Twelve months of ageing at 38 metres of depth, exploiting a temperature ranging from 9 to 13 degrees throughout the year, absence of light and sound and the same type of action of pressure and low presence of oxygen as the sea, as **Furio Battelini**, winemaker at the Riva del Garda winery, explained.

"At that depth there is less difference between the pressure inside the bottles (about 6 bar) and that of the lake (constant at almost 5 bar), as well as an almost total absence of oxygen," Mr. Battelini said. "These are difficult conditions to create on the surface, which reduce the internal-external gaseous exchange, enabling a slower maturation."

Moreover, Mr. Battelini continued, there is the role the currents play, which prevents deposits and yeast stratification forming during the autolysis stage.

Going further south, to Castelli Romani, we return to a connection with ancient history. Two ancient ships from the reign of Caligula were found in Lake Nemi, bearing witness to the close relationship with the centre of Roman culture and, fittingly, it was a red Roma DOC produced by the Monte Due Torri winery to be immersed in the waters of the lake. The peculiarity in this case was not just the immersion, but also the characteristics of the lake, which is of volcanic origin. Basically, at 18 metres of depth the bottles are in total darkness, with a light current, at a temperature of 9 degrees in almost total absence of oxygen. The experiment should have seen the bottles re-emerge in March 2020, but it has been an unfortunate year and the wine continues to rest at the bottom of the lake, placidly waiting for better times to return to the surface.

In conclusion, we asked ourselves if these wines gain in quality and distinctiveness by ageing in the sea and if it's worth it, considering the decidedly high prices. This consideration has been made with **Andrea Briano**, long-time Master Taster of ONAV and Champagne expert, who made his idea clear to us.

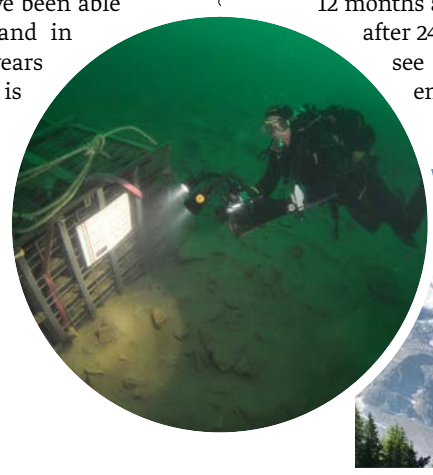
"Wine ageing must always be a means and not an end," Mr. Briano said. "The basic concept is that for important ageing, you must start with an equally important, well-finished, absolute quality product. In the case of sea ageing, in my experience this correct ratio has not been reached yet, there being a clear unbalance in favour of marketing compared to content. Let's be clear, the potential for ageing exists, but at the moment I still think it needs to be demonstrated. I believe more needs to be invested, after the experimental stage with huge fixed costs, on the quality of the wine put into the bottle."

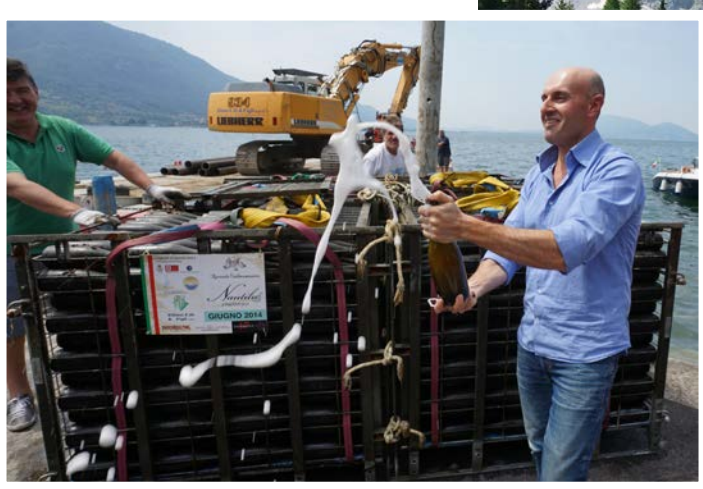
"I hope," Mr. Briano concluded. "That, in future, we can count on products that start with a wine of great substance to be able to assess in full the influence of ageing under water."

Given the fame these wines are achieving on the market and the curiosity of many producers, it can be imagined that Mr. Briano's invitation will not go unheeded for long, we can therefore confirm without the shadow of a doubt that good wine can (also) be made with water.

On the left, the director of the winery, Massimo Fia, recovering the bottles. To the right, the winemaker of Cantina Riva del Garda, Furio Battelini (at the centre).

Andrea Briano





Bottom left: Alex Belinghieri uncorking a bottle of Vallecamonica's wines; here divers recovering Adamadus sparkling wine from the waters of an Alpine lake; in the circle: underwater operations in the lake Iseo

Corkers for natural, agglomerated and synthetic corks.

From 1.000 bph up to 40.000 bph

Crowners for steel and aluminium crown corks.

From 1.000 bph up to 60.000 bph

T-corks, Bidoule
Ring Pull
Corks
ROPP, aluminium caps
Pressure plastic caps
Glass closures

Cappers for ROPP aluminium caps.

From 1.000 bph up to 72.000 bph

AROL closure systems

For 40 years, the widest range of capping machines for natural, agglomerated and synthetic corks, ROPP aluminium caps and crown corks for wine, spirits, beer and edible oil.
From 1.000 bph up to 72.000 bph.

Discover our full line on arol.com - contact: info@arol.com

LAGOON WINES

There is an ancient vine-growing and winemaking tradition in the Venice territory and its islands, which has been rediscovered and relaunched with enthusiasm

by **OMAR BISON**

Wine and Venice, a centuries-old combination. It is a social and cultural bond set to exceed the huge commercial interests exercised by Venice on this product, between the shores of the Mediterranean and the Adriatic. The Republic of Saint Mark was a pioneer of wine, setting up associations, trade regulations, transport, racking and bottling, sales, distribution, serving and drinking wine in the *malvasie* (high-level shops selling alcohol) and *samarchi* (lower-level taverns bearing the San Marco winged lion). And the legacy is behind every street, every bridge, with names like "*riva del vin*" (wine riverbank), "*ponte de la Malvasia vecchia*" (old Malvasia bridge), *magazèni* and *bastioni* (low-level taverns), etc.

But as well as a glorious past, there is a city of art admired all over the world, which has relaunched its traditional food in the whole of the lagoon, including the islands. Particularly today, when mass tourism has come to a dramatic standstill due to the pandemic. And there is a young food service, eager to discover the traditions of native Venice that wants to promote and illustrate them through menus and wine lists that include fish, vegetables and wine from the lagoon.

What wine from the lagoon? For years, some well-known producers have been creating wines classed mainly as "table wines" and they have done good business. And there is also a Consortium, the Consorzio Vini Venezia, the holder of the Venezia DOC, among others. It covers an area including the whole city and the lagoon, and has published magnificent texts since 2010 on the study of germplasm of small, old vineyards scattered among Venetian monasteries, vegetable gardens and gardens and on the rediscovery of native varieties, as well as indicating a business outlook. Nearly everyone would like to highlight the link between Venice and the "terroir" on the label as much as possible.

Venissa and Dorona

In 2002, Treviso business man Gianluca Bisol began to delve into the history and tradition of Venetian wine and identified some Dorona white grape varieties.

"In particular, he studied Venetian wine production in-depth," **Matteo Bisol**, his son and manager of the Venissa restaurant and winery on Mazzorbo, underlined. "And he learned that, though production was limited, most grapes were grown and vinified on the islands in the northern lagoon, outside the city centre which focused more on administration, business and artisan activities. Wishing to illustrate and help preserve this history and tradition, which grew hand-in-hand with a unique city inimitable elsewhere, we began by observing the 'Scarpa Volo' winery on the island of Mazzorbo, and gradually set up a current vineyard of 0.8 hectares of Dorona."

The first selection of this grape is transformed into three thousand bottles of 0.5 litres of Venissa, a wine that is generally orange and oxidized, complex and heavyweight, the result of long maceration on the skins (between twenty and thirty days) and destined to age for at least four years. And a second grape selection produces Venusa Bianco, 3000 bottles of 0.75 litres, a more convivial, easy-drinking wine, made from a couple of days of maceration and two years of ageing. There is also Venusa Rosso, a blend of red grapes, mainly Merlot, worked on a vineyard surface area of two and a half hectares on the Santa Caterina island. The problem of high water has found a twofold solution.

A bottle of the Venissa vineyard being engraved in golden; at the center, their vineyards on the Venetian island of Mazzorbo; bottom left, Matteo Bisol

CONSORZIO VINI VENEZIA
TRE TERRITORI ALL'OMBRA DEL LEONE

Stefano Quaggio

RESEARCH CARRIED OUT BY THE CONSORZIO VINI VENEZIA

A recent study by the Universities of Padua and Milan, the Consorzio Vini Venezia and the viticultural research centre in Conegliano (Treviso) aimed at recovering, characterising, safeguarding and developing Venetian viticultural biodiversity, has enabled us to recover resampled viticultural material to create two new vineyards, one in Torcello (Baslini) and the other in the vegetable garden of the church of the Discalced Carmelites. Two surveys were carried out in 2010 and 2012 to define the origin, identity and the extent of grapevine germplasm in the Venetian lagoon. Eleven areas were involved, between the northern lagoon (Torcello, Vignole, Sant'Erasmo), Venice and the southern lagoon (Lido Alberoni, San Lazzaro degli Armeni and Pellestrina). This research gave 26 molecular profiles, 23 of which correspond to varieties already identified (21 vitis vinifera). They are mainly white grape varieties: Albana, Dorona, Garganega, Glera, Malvasia Istriana, Moscato Giallo, Tocai Friulano, Trebbiano Toscano, Trebbiano Romagnolo, Verduzzo Trevigiano and Vermentino; the black grapes are Marzemino, Merlot and Raboso Veronese.

"This recovery carried out on vines found and recovered, which had been trained for almost exclusively ornamental purposes, helped us understand the history and origin of what we already had at home," **Stefano Quaggio**, director of the Consortium, underlined. "I believe that today, there is a way to do business on the Venetian islands, but we must focus on quality and image rather than quantity."

An experimental vineyard on the Venetian island of Torcello

WINERY DATA SHEETS

ORTO DI VENEZIA
Via de le Motte 1, 30141
Sant'Erasmo Venezia
orto@ortodivenezia.com - 348/8727500
Website: **ortodivenezia.com/wineita.html**
You can visit, with a guided tasting, and buy in the cellar
Shop online: **www.wineshop.it** - **www.etilika.it**

WINE:
ORTO DI VENEZIA
Ungrafted grapes: **Malvasia Istriana, Vermentino**
Vineyard surface area: **four hectares**
Harvest: **by hand**
Winemaking: **in steel**
Ageing: **two years in bottle**
Wine type: **still, dry**
Colour: **straw-yellow**
Aroma: **intense, floral, herbs, mineral, iodine**
Flavour: **full, fresh, lingering**
Alcohol content: **13%**
Serving temperature: **10°C**
Production: **15,000 bottles of 0.75 l - 350 magnums**
Pairing: **fish, seafood and vegetables grown in the lagoon area**

VENISSA
Santa Caterina, 3 30142 - Mazzorbo Venezia
Website: **www.venissa.it/vino**
info@venissa.it - 041/5272281
To buy: **www.venissa.it/vino/richiesta-vino-venissa-venusa/** - available online.

WINES:
VENISSA
Vineyard: **Mazzorbo Island**
Ungrafted grapes: **Dorona**
Vineyard surface area: **0.8 hectares**
Harvest: **by hand**
Maceration on the skins: **30 days with manual punching down**
Winemaking: **48 months in steel**
Ageing: **24 months in bottle**
Wine type: **still, dry**
Colour: **golden-yellow with amber highlights**
Aroma: **intense, mineral, iodine, liquorice, tobacco, dried yellow-fleshed fruit**
Flavour: **full-bodied, mineral, lingering, oxidized**
Alcohol content: **13.5%**
Serving temperature: **12°C**
Production: **3,500 bottles of 0.50 l**
Pairing: **grilled fish, seafood, white meat**

VENUSA BIANCO
Vineyard: **Mazzorbo Island**
Ungrafted grapes: **Dorona**
Vineyard surface areas: **0.8 hectares**
Harvest: **by hand**
Winemaking: **24 months in steel**
Wine type: **still, dry**
Colour: **straw-yellow**
Aroma: **floral, yellow-fleshed fruit, salty**
Flavour: **mineral, fruity, quite fresh**
Alcohol content: **12.5%**
Serving temperature: **10°C**
Production: **3,000 bottles of 0.75 l**
Pairing: **fish and shellfish**

VENUSA ROSSO
Vineyard: **Santa Cristina Island**
Grapes: **Merlot (70%) and Cabernet Sauvignon - old vineyards**
Vineyard surface area: **2.5 hectares**
Harvest: by **hand**
Winemaking: **12 months in barriques**
Wine type: **still, dry**
Colour: **ruby-red with purplish highlights**
Aroma: **red berries, notes of spice and tobacco**
Flavour: **full-bodied, quite plush and warm**
Alcohol content: **14%**
Serving temperature: **16°C**
Production: 3,000 bottles of 0.75 l
Pairing: **cheese, red meat, pasta with elaborate sauces**

Michel Thoulouze, owner of L'Orto di Venezia vineyard posing with a bottle; at the center, a bottle with a view from the island.

photo ©Matia Mionetto

"A wall surrounding the vineyard on Santa Caterina," Mr. Bisol pointed out. "And Dorona, a particularly hardy variety, even when submerged in sea water. The ability to absorb very little sodium is one of its characteristics and even with the latest high water, we only had to replace very few plants, always ungrafted ones. We are talking about resilient vineyards."
According to Mr. Bisol, neither of these vineyards can be extended, but there are areas of Venice and the islands that could be turned into vineyards.
"The Venetian islands have their own history and particular geological evolution with different structures and characteristics from soil to soil," he said. "For us, some of the so-called 'native Venice' areas could be potential vineyards, including the islands of Mazzorbo, Torcello, Sant'Erasmo and Vignole. In any case, there is always limited space and complicated administrative procedures. The important thing is that they are the result of sustainable agriculture."

The Vegetable Garden of Venice

Sant'Erasmo has had a renowned vegetable production for centuries and the local farmers have continued to produce vegetables as in the past, following tradition, and the purple artichoke (their most famous product) is a glowing example.
"It is a wonderful place," **Michel Thoulouze**, owner of the L'Orto di Venezia winery, underlined. "About fifteen years ago, it took us three years to purchase the current property, with the building in much need of renovation. But I was convinced that there were all the necessary conditions to make a great wine on these soils, which on old seventeenth-century maps were defined as 'vineyards of the nobleman'."
The terroir, Mr. Thoulouze claimed, is the great resource of this island, "with its particular soils where I have built a drainage system and planted ungrafted vines."
He produces a white wine from (mainly) Malvasia Istriana grapes and a Vermentino, with good length, strong minerality and notes of iodine and salt, grown on clayey-calcareous soil with marine (shells etc.) and dolomitic deposits. The grape blend spends ten months in steel and two years in the bottle before release onto the market.
"We like to work well in the vineyard without forcing things or using treatments," he said. "If the grapes are good, the wine will be good."
The yield is 35 hectolitres for every four hectares, making for a number of bottles ranging between 12 and 15,000, depending on the vintage, plus about three hundred magnums that are left for 5 years in a punt (a typical Venetian boat), sunk in a secret area of the lagoon.

The Lagoon In The Glass

Renzo De Antonia, retired architect and teacher, is the president of a cultural association called "*Laguna nel bicchiere*" (Lagoon in the glass). Founded in 2008, it deals with the recovery of abandoned vineyards in the lagoon, entrusted to them by private parties or public institutions. They don't privately own any vineyards and make wine on the island of San Michele, in the old sixteenth-century cellar of the Franciscan monks. "The association was created from the teaching experience of the founder and president Flavio Franceschet, who passed away three years ago, who I succeeded as vice president," Mr. De Antonia said. "At a middle school where we both taught, it began more as a game with the children to make wine by crushing the grapes with their feet. The aim was to make the children from Venice understand that there wasn't just sea and stones in the lagoon, but vegetable gardens and countryside. In 2008 Flavio had contacts with three monks still on the island of San Michele who told him that the order had decided to close the monastery and that the cellar and vineyard would be abandoned. At that point, having seen to the legal side of things, Fabio applied to the council to be granted the right to use the cellar and vineyard, and that's what happened and it's still going on today."
When the association was founded, vine-growers and restaurant owners also took part and their contribution helped to continually improve the quality of the wine. Later on, they took on the management of other vineyards than San Michele, where they grow very old vines and produce white wine by crushing mainly Dorona, Malvasia Istriana and Glera grapes with their feet or with a small destemmer. "We make rootlings by planting cuttings directly in the soil, just as they are, ungrafted, and we replace those that are missing; I'm referring to the damage caused by high water in 2019. They are all very small vineyards which produce a barrel of three hundred hectolitres of wine each in good years. We don't make monovarietal wines, but use a grape blend with what we've got. We don't treat the vines with anything other than very little copper and propolis, we leave everything to the native yeasts during the winemaking stages and, at the end, we don't add sulphur dioxide. If the vintage goes badly, so be it. We don't sell the wine we produce, it is drunk by members or used at events to promote membership. It should be underlined that Venice is full of gardens, contrary to popular belief, and there are many vineyards, also growing table grapes. There are also several places that historically produce wine, for example the nuns and monks on Giudecca, but then there are other more famous and established producers, such as the Franciscans from San Francesco della Vigna (the oldest vineyard in Venice, managed today by the Marzotto family who own Santa Margherita) or the Discalced Carmelites of the Santa Maria di Nazareth church in Cannareggio."
Another thing that fills them with pride is having been the founder members of an association called the Urban Vineyards Association, which was created to promote vineyards in the city.
"For now, they are only in Italy and France," he said. "The Italian ones include us, San Francesco della Vigna with Santa Margherita, Leonardo's vineyard in Milan, the Queen's vineyard in Turin, a vineyard in Siena and the Vigna del Gallo in the botanical garden in Palermo. In France, the Clos Montmartre in Paris, the vineyard of the Popes in Avignon and the Clos de Canuz vineyard in Lyon. Covid has stopped these activities, but they will soon start up again and Berlin and Amsterdam are set to join shortly, too. Our two aims are to make ourselves known in order to access European funding and then, considering that tourism linked to food products, especially wine, is on the rise, we would like to create European itineraries that include visiting cities and urban vineyards. That lagoon wines may find room on wine lists of restaurants that count has been demonstrated by two private businessmen whose products go all over the world."

Barriques, barrels and vineyards of the cultural association "Laguna nel bicchiere"

54th EDITION

FERRICOM

vinitaly

INT'L WINE & SPIRITS EXHIBITION

PASSION IN BUSINESS

18 - 21
APRIL 2021
--> VERONA <--

WWW.VINITALY.COM
TRADE ONLY

TOGETHER WITH

SOL&AGRIFOOD
TASTE OF BUSINESS

ENOLITECH
TECHNOLOGY & INNOVATION

OperaWine
GRAND TASTING
FINEST ITALIAN WINES

5STARWINES

5StarWines
THE BOOK
5starwines.it

24th INTL PACKAGING COMPETITION
vinitalydesign
2020

INTERNATIONAL
PACKAGING
COMPETITION
vinitaly.it

Organized by
veronafiere
Trade shows & events since 1898

VERONAFIERE.IT

IN THE VINEYARD AND IN

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

AROL

The widest range of capping machines for each speed

For 40 years Arol has been the point of reference in developing and manufacturing the widest range of capping machines for natural, agglomerated and synthetic corks, ROPP aluminium caps and crown corks for wine, spirits, beer and edible oil. Quasar, in its "free standing" or turret configuration, is one of the Arol corkers particularly suitable for wine, sparkling wine and also beer. It is ideal both for small and large productions and is designed to ensure maximum efficiency and productivity. According with your needs, you can count on different applications: with mushroom corks (F version) up to 27 heads, natural straight corks (R version) up to 30 heads, natural straight corks and mushroom caps (RF version) up to 27 heads. Corks distribution is by pick and place transfer disc. Its compressing units are in hardened steel for contact materials and are easy to extract, thanks to a "quick release" system. It has an automatic centralized electrical adjustment for plungers in order to control the depth of cork's insertion. It can count on a dust extraction system which extends its components life time and minimizes the presence of cork's dust sucking directly both from the pick and place and in the compressing units. It is fully "washable" thanks to stainless steel components. Its lifting spindle cam and cam follower reside in an oil-bath, providing low maintenance and long life. It has a bottle-neck oxygen remover device, equipped with a washing circuit system that enclose all the vacuum parts in the capper and even the vacuum pump assembly, in order to ensure maximum cleanliness. Discover this and other Arol solutions for wine capping on www.arol.com.

CAMPAGNOLA

Plug-in shears make pruning easier and easier

The Italian company Campagnola, a reference point in the design and manufacture of pneumatic and electric solutions for pruning and harvesting, makes a new proposal to the modern operators: the innovative cordless shears of the Green Line, which are suitable for non-intensive use. Powered by a plug-in battery, these shears allow you to prune without any cables, in full movement freedom. Campagnola offers a wide range of plug-in shears: Speedy, able to carry out small cuts at high speeds, ideal for horticulture and viticulture; Stark M, performing clean and precise cuts, suitable for vineyard, orchards and olive groves; Stark L, the most powerful, perfect for citrus and olive groves as well as for ornamental plants. Easy handling, lightness, greater speed and power are the specific features of the Campagnola plug-in shears. For the 2020-2021 pruning season, two new accessories are proposed for these indispensable tools of the Green Line: the cable, which allows you to remove the battery plugged in the shear lower part and to put it into your pocket, ensuring the necessary power for an excellent performance. This considerably reduces the weight of the tool and further increases the use comfort; the telescopic extension pole, specifically designed to be connected to the Stark M and Stark L models. Thanks to its extension from 1.50 to 2.30 m, it is fit for branches which are difficult to reach. This way they can be cut avoiding the use of stairs. The range of made in Italy products in the Campagnola catalogue presents solutions for all needs relating to vineyards, orchards, citrus groves, ornamental and evergreen plants. The operators who choose Campagnola, choose innovation, guarantee and quality.

CIMA

Targeted plant treatment with Cima Sprayer

For over forty years, Cima has been taking care of crops by building low-volume pneumatic sprayers and dusters for crop protection. One of the highlight of its product range is the 4 diffusers each) works Multi-Vitis6: a 6 hands and 4 upper cannons sprayhead that enables vineyard treatments simultaneously covering 6 faces (or 3 rows) with one pass, i.e. the two full internal and external rows where the machine passes (by the hands), and the two internal sides of the adjacent rows (by the guaranteed by the action of opposing flows: the lower hand of each side (with at the same and opposite flow to the over-row hand that is adjustable in height and tilt. Two upper hands at two diffusers each are for spraying the upper part of the row. This way the coverage is virtually perfect and complete. The new over-row sprayhead can be applied to the Link series of pneumatic sprayers, particularly suitable for those who work in narrow and short head land rows or limited spaces, while being able to cover big extensions. The Link series stands out for a machine structure that includes the multiplier/fan assembly mounted on the tractor's three points, with the distribution sprayhead is applied directly to the fan assembly. The articulated joint where the trailer assembly is attached, allows the sprayer to turn with a short turning radius without ever having to disengage the PTO going in and out of the rows. Furthermore, with the appropriate adjustments, the wheels of the trailer track the tractor's tires tracks. Usually the Link series can be equipped with many different distribution sprayheads suitable to different crops, all with an anti-dripping system. The sprayheads are based on the principle of the Venturi Tube, which provides a more uniform spray atomization and a complete foliage coverage.

DELLA TOFFOLA GROUP

New line of three different smart pneumatic press models

With 8 productive units in Italy and abroad, 10 foreign sales offices, and distribution and assistance guaranteed all around the world, Della Toffola Group 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 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 processing time or, depending on the model, continuously process product inflows and outflows. All presses ensure levels of quality and efficiency never seen in the market before while maintaining enviably easy use. Della Toffola Group offers the latest technology solutions also for wine bottling and labelling. The filling systems for still and sparkling wines Linebloc Iso Ep – Iso EP-RL and Linebloc G-Evo, are able to integrate any capping/wire hooding solution and also a labelling system to create a space-saving and efficient Synchro-bloc system. Quality, service, and flexibility are the values 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.

Info: www.dellatoffola.it

THE CELLAR

ENOMECCANICA BOSIO

Crossflow membrane filters – green solution: less waste for disposal, more respect for the environment

Enomeccanica Bosio Srl has been operating in the winemaking field for more than 40 years, growing in parallel with new applied technologies and the needs of individual clients. Our goal is to create machines which are conceptually simple, yet guarantee excellent performance, ease of use and a high standard of reliability. Our crossflow filter has been specially designed for operating on wine, and in particular on very fine wines. Particular attention has been paid to the choice of components and how the machine interacts with the product being treated. Our filter elements require no particular preliminary treatments, and – as requested by end users – considerably reduce the need for maintenance and after-sales service. The ceramic membranes we use have a very low capacity for adsorbing most of the noble components in wine. Furthermore, they have no difficulty withstanding temperatures of up to 100 ∞C and pressures of over 20 bar, and guarantee an operating life which is more than five times longer than that of organic fibre. With our patented "Back-Pulse" products, a turbidity of 0.00 NTU can be obtained in a single step starting from unfilterable values. Thanks to latest generation PLCs, our filters comply with Industry 4.0 parameters.
Info: www.enomeccanicabosio.it
Tel. 0039 0173 290922

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

ENOMET IMPIANTI

Introduction to Our Company

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.

ENOMET
IMPIANTI ENOLOGICI

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 CO_2, 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.

GAI MACCHINE IMBOTTIGLIATRICI

Cantine Cielo e Terra: "Gai astonished us with its simplicity"

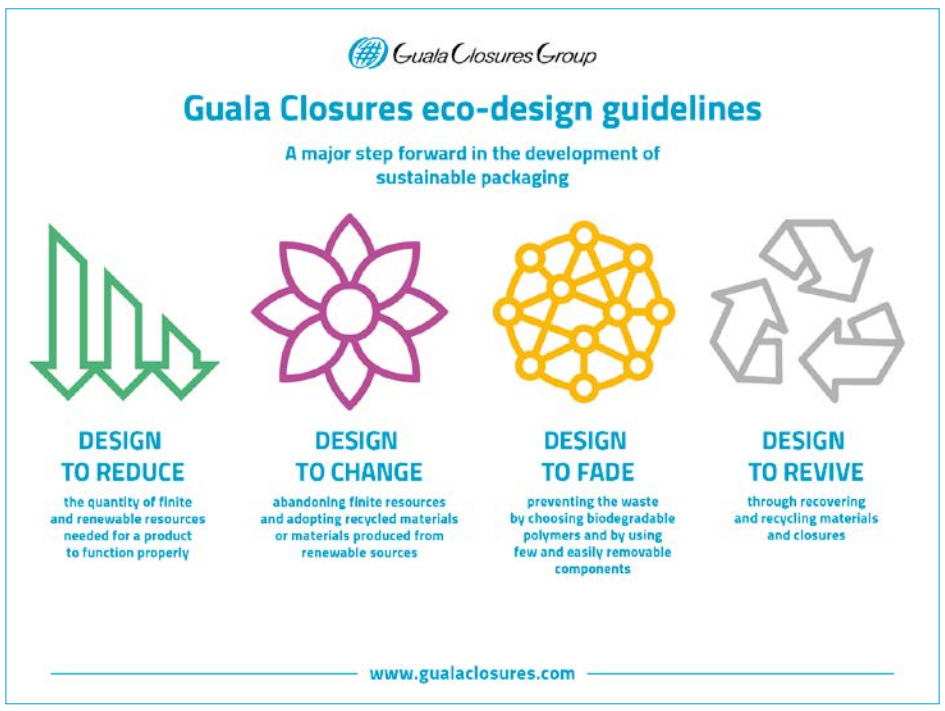
Thanks to major investments in production and technology, Gai Macchine Imbottigliatrici is able to manufacture considerably high speed machines, in monobloc version. An example is the 15032RE-HP with 72 filling valves and 15,000 b/h nominal speed recently delivered to Cielo e Terra, a Venetian cooperative winery that involves over 1,000 members who cultivate 3,700 hectares of vineyards. "The new Gai monobloc astonished us for its simplicity – says Giampietro Povolo, Finance and Operation Manager of Cielo e Terra – we wanted to increase production capacity while obtaining full control over the quality of the bottling. However, large filling machines are often made through the connection of other standalone machinery. Gai instead concentrates rinsing, isobaric filling and capping in a single monobloc-frame". Simplicity means less time spent on commissioning. A monobloc of this size took less than a week to be assembled in line, and five weeks after the delivery it was already in production. Being "simple" also means easy sanitization thanks to a circuits design drawn to have specific and effective cleaning flows: "With these machines we have no longer had problems of microbiological pollution and we don't use steam for sterilization anymore – continues Povolo –. Less water, less detergents, less energy consumption, more respect for the environment". Finally, simplicity means low maintenance and effective assistance, an aspect on which Gai put the utmost attention. "Sometimes the maintenance costs reach the cost of the machine itself – concludes Povolo –. However, we set a long-term maintenance contract with Gai which guarantees, combined with all the reliability of the monobloc, a more competitive TCO (Total Cost of Ownership), the total cost of the machinery throughout its life".

GRUPPO BERTOLASO
What innovation means to us

Innovation is a very diffused word when talking about technology. For us at Bertolaso it has a very precise value, which goes beyond the simple quest for novelty. To us innovation means responsibility. At Bertolaso we are well aware of the crucial importance of our machinery in our customers' work. This is why there cannot be technical evolution if not for the benefit of systems reliability, which must be a productivity guarantee. Innovation means experience. Bertolaso is dedicated to the needs of those who have been bottling for 140 years. The activity of our Research and Development team is so incisive because it is based on unparalleled expertise and specialist competence. Innovation means collaboration. Our solutions bring advantages because they respond to the actual, specific needs of each individual partner. Our designers have a dedicated method, which starts with the relationship with the customer and stays active over time. Innovation means results. Technological innovation is measured in its concrete advantages. The most recent implementations have allowed our machinery to achieve 48,000 bottles per hour. Innovation means vision. In an increasingly demanding market, the profound value of being innovative for us lies right here: in reading the evolution of a market, by anticipating its horizons and thus being able to orient our partners. This is true innovation for us.

GUALA CLOSURES GROUP
Guala Closures innovates for a better future

Over the years, Guala Closures Group has undertaken a long-term strategy of excellence and innovation, which has led to the definition of an ambitious Group Corporate Social Responsibility (CSR) strategy with specific objectives that cover the following three dimensions: social, environmental and economic. Recently, the Group decided to accelerate its commitment by pursuing the challenging objective of using 35% of recycled materials by 2025, implementing increasingly environmentally friendly solutions and developing new ones at its innovative R&D centre, extending its existing range of sustainable closures. As a result, the Group has recently developed eco-design guidelines for its five R&D centres (Italy, Mexico, United Kingdom, Ukraine and Luxembourg). Guala Closures eco-design guidelines seek to facilitate the development of sustainable closures by adopting four defined design models: Design to Reduce – a principle based on eco-design and on the eliminating anything that is not necessary; Design to Change – abandoning finite resources and adopting recycled materials or materials produced from renewable sources; Design to Fade – this approach entails making the waste disappear by changing to biodegradable polymers and by using a few easily removable components; and Design to Revive – achieved by recovering and recycling the materials used in the closures. The eco-design guidelines are an important step for the Group in the development of sustainable packaging. As a concrete result of this CSR commitment and strategy, the Group is developing a comprehensive range of sustainable closures for wine, oil, spirits, and beverages, all of which adopt at least one of the four design models listed in the guidelines.



IDEAL
Ideal solutions for your vineyards

Since 1947 Ideal company has been producing sprayers of all kind 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 an automatic work as well as a 50% 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 3 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 group hanging on tractor and tank 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 models, 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 for vineyard protection offered by Ideal, which has been working for over 70 years to find the best care for your crops.
Please visit our website www.idealitalia.it for more information.

MACA ENGINEERING
Caps making equipment

For 30 years, we design and produce only tailormade machines and complete lines for manufacturing, assembling and cutting aluminium and plastic caps: highly technological solutions able to satisfy any specific need of closures production with a special attention to materials' optimization. We can count on a highly skilled in-house design team who conducts feasibility studies on new caps having also at disposal a test room where the customer can organize pre-production sample runs and conduct application trials. In view of constant improvement, Maca has renewed its rolling-lining machine for aluminium screw caps for wine. The machine consists in a vertical continuous rotary motion rolling machine with 8 heads for knurling, perforating, rolling and beading aluminium closures; a system for simultaneous centring of the knurling on all 8 heads; a continuous motion rotary inserting machine with 16 punches for inserting double faced EPE/Saranex, and/or single faced Tinfoil liners. The particularity of the new model comes from the need of customers to reduce as much as possible, during the processing of wine caps 30x60, the change format time from EPE/Saranex to Tinfoil liners and vice versa. This rolling-lining machine is equipped with two separate feeding systems: this allows to change the type of liner to be inserted inside the cap in less than 5 minutes. Output: 30.000 pcs/hr maximum.
Discover our full line on macaengineering.com

METALUX

Pvc-Free capsules: now, for all kinds of capsules

Pvc-Free capsules...
Now,
for all kinds of capsules!

- Pvc-Free thermo-shrinking capsules
- Pvc-Free polylaminate capsules
- Pvc-Free champagne capsules

Successful removal of any vinylic resins
If you want Pvc-Free capsules,
Metalux Capsule can satisfy your needs.
Enter the new era of Pvc-Free capsules!

NORTAN

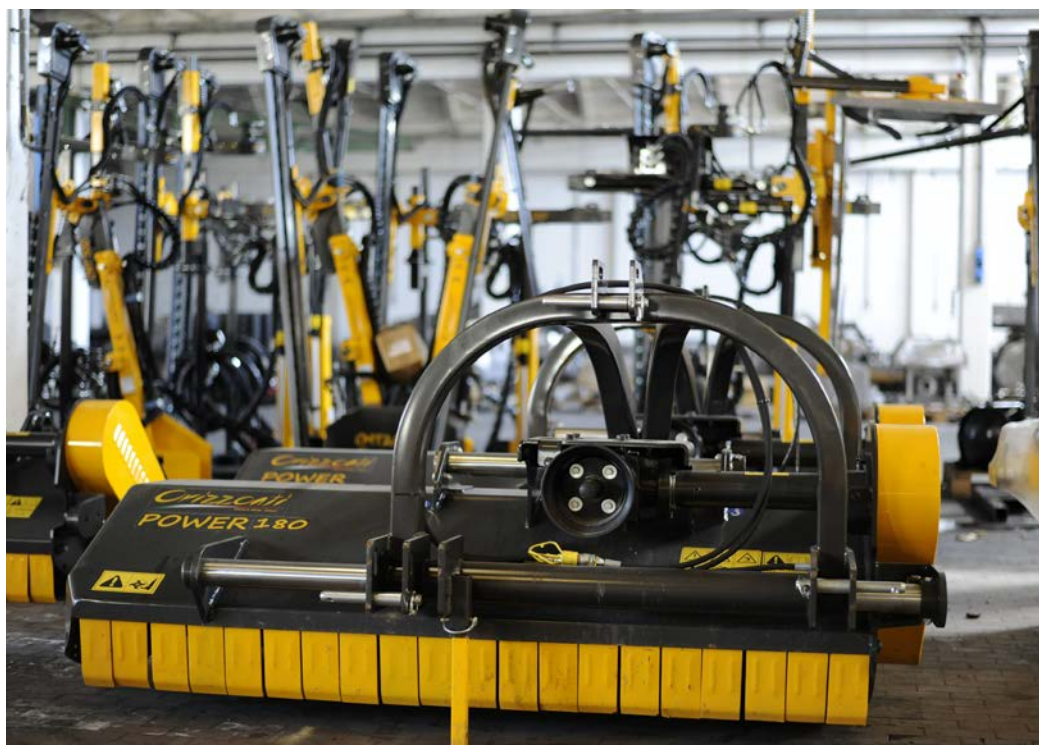
New Syncrocap Capsule Distributor

Thanks to an innovative mechatronic project (FEDS Technology), the new Syncrocap distributor can automatically adapt to the different capsules to be processed, thus reducing the format change times up to 80 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 timing 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* or visit our Facebook page *facebook.com/nortansrl/*

ORIZZONTI

Over 40 Years of Passion. The Vineyard Specialists

Orizzonti 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*



SUGHERIFICIO DI BUSSOLENGO

Deviations, Soluble and Invisible Foreign Matter

The 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 specialized 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.

ZOWART

EXPERIENCE, PASSION, PROFESSIONALISM.

These are the three words that since 2009, we offer to Italian wines.

Since 2009, day after day, we have been certifying Italian Designation of Origin wines. Our methodologies represent a reference for national and international operators, as they guarantee both the traceability of products and the compliance with the standards set by the Production Specifications.

Valoritalia. Added value. For your products.

VALORITALIA

VALORITALIA.IT