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WINE WORLD MAGAZINE

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A GLOBAL OVERVIEW ON YEAR-END CONSUMPTION IN THE WORLD'S LEADING MARKETS

Christmas & Sparkling Wines in a Time of Crisis

After steady growth for a decade, 2023 is shaping up to be the first difficult year for sparkling wines in a while. Champagne and Prosecco, the two most important brands, don't have anything to worry about, while Cava's performance remains uncertain. What do market trends show? France and Italy confirm positive expectations for Christmas, the United States faces a destocking problem. In Germany and Northern Europe, inflation-driven prices partially penalise sparkling wines while in Canada, China, Japan, South Korea markets show big differences with examples of growth, but also of slowing down. Michel Rolland told the story in an exclusive interview. page 2

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WORLD WINE IMPORTS - SEPTEMBER 2023 SUMMARY

TOTAL DEADLOCK

The July-September quarter did not budge from the values recorded in June, -9%. The negative dynamics are now long-term and progressively worsening compared to 2022 and the beginning of 2023



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SPARKLING are a CHRISTMAS CLASSIC.

But It Has Been a Rocky Year for Bubbles

WORLD MARKET
ANALYSIS AND
PRODUCTION
TRENDS FOR
FRANCE, ITALY
AND SPAIN

After steady growth for a decade, 2023 is shaping up to be the first difficult year for sparkling wines in a while. Champagne and Prosecco, the two most important brands, don't have anything to worry about, particularly the former according to David Chatillon, president of the Comité Interprofessionnel du Vin de Champagne (Civc). Italian benefits from a diversified production, while Cava's performance remains uncertain.

What do market trends show? France and Italy confirm positive expectations for Christmas, the United States faces a destocking problem, while Prosecco fares better than Champagne in Canada. In Europe, inflation-driven prices partially penalize sparkling wines in Germany, and northern Europe consumers downgrade to cheaper products, while in Canada, China, Japan and South Korea, markets show big differences with examples of growth, but also of slowing down. In an exclusive interview with Michel Rolland, we talk about Asia and the sparkling wine market. The famous oenologist does not mince words, making harsh judgments about Champagne, Prosecco and Cava

By GIULIO SOMMA AND FABIO CIARLA

Sparkling wines are not escaping the current crisis, although they remain the wine category least affected by recent market hardships. After years of significant and uninterrupted growth, dark clouds are gathering over the sparkling wine market. The category is noticing increases in value and decreases in volume, but also concerning drops in turnover given the general decline in wine consumption globally.

Champagne is once again at the head of the pack due to a series of coincidences that created greater demand and a sharp rise in prices. It's a dangerous situation from which French bubbles could however emerge strengthened, according to our data. David Chatillon, president of the Comité Interprofessionnel du vin de Champagne (Civc), believes this may lead to more expensive products.

In a different league in terms of value, Prosecco is the only real competitor on the global scene. Although it experienced smaller growth than expected, the brand is still willing to make a name for itself, especially in the context of inflation and currency crises. Cava, the classic middle ground in terms of prestige and value between the two champions, remains unable to brand and market

itself clearly and convincingly. The latest proposal from the appellation is a zoning division into macro-areas, unfortunately difficult to understand abroad and already weighed down by internal quarrels. In an exclusive interview, Michel Rolland, the great French oenologist, paints an ironic and provocative picture of Champagne, Prosecco and Cava in the world. He believes there is an opening in Asia, a market until now very difficult to penetrate for bubbly. More than anywhere else, the Asian market continues to rely on strong brands, mainly Champagne, while highlighting how alternatives, in some cases, are key for a growing market. In South Korea, the big brands are making the biggest gains, while other products are struggling. China seems to be finally opening to all sparkling wines, not just Champagne, moving from consumption of "status symbol" products to bottles for drinking in simpler, everyday contexts. The situation in Japan is slightly different. The crisis and rising pressure on the Yen have generated steep price increases that pushed consumers to search for alternatives. There's a golden opportunity for countries like Italy and Spain, which have become much more than occasional exceptions.

Looking at America, the U.S. market is showing a worrisome

slowdown affecting both still and sparkling wines due to strong destocking. Canada is experiencing a brighter situation. Oddly enough, Prosecco is doing better than Champagne, reversing the international trend.

In Europe, Germany seems to be holding its own, although facing some pricing revisions and positioning policies. In northern Europe, with the price increases of recent months, the watchword is downgrading. In short, people are continuing to drink sparkling wine but of a lower quality, which is not necessarily good news.

The major producing countries are doing better. France is still resolutely nationalist and its consumption almost only rewards Champagne (a few Italian or Spanish bubbles hold their own but with residual figures). Italy is spoiled for choice, relying on various classic methods in addition to the Prosecco phenomenon and the classic Asti, while also giving space to special editions of Champagne. The Spanish market is more sparkling than still wines, but only slightly.

In short, everyone is hoping that the end-of-year festivities will serve as a new starting point in the wine world, at least for sparkling wines!



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 France


AN INTERVIEW WITH CIVC PRESIDENT,
DAVID CHATILLON

CHAMPAGNE,

Confidence and Tools to Plan Success

David Chatillon is the president of Cive (Interprofessional Committee of Champagne Wines), the institution that oversees the two pillars of Champagne, Sgv (Syndicate of the 16,200 winegrowers) on one hand and “Maisons de Champagne” on the other hand with their 370 producers, some of them beyond the most famous brands in the world. During the last three years, Champagne has quite seen it all. Low production in 2021, very big ones in 2022 and 2023. A full stop consumption with Covid and an historic year 2022 with a peak of sales at 324 millions of bottles. Champagne is only 4% of the French vineyard but represents 24% of the French exportations (in value). With this incredible yo-yo in such a short time and the current worldwide inflation and geopolitical instability it was essential to have the point of view of Mr. Chatillon, elected president since last year after having been general director of this institution. He gave us an interview about the current situation and outlook. Globally, he is optimistic for the most famous sparkling wine appellation in the world.

President, for the last four years, Champagnes have gone through very different states. After the Covid years, 2022 was impressive, even marked by a certain shortage. What is the trend for the end of the year?

That's true, last year there were some tensions on a number of brands or cuvées. The quantities produced were small and demand was very high. We were unable to meet this demand. But this year, the tensions will be less because market volumes have been regulated. Last year, we sold 324 million bottles. This year, on 12 month-rolling by the end of October we are at 305 millions of bottles. Of course, 2023 will be less than the year before. But 2022 was a year completely crazy. Now, we observe a return to normal.

How did you proceed to regulate?

You probably remember the terrible year of 2020. Nobody expected what happened and we decided to produce less Champagnes for the coming years because of this global uncertainty. And nobody was able to bet on a year like 2022. It was a general euphoria. We had not anticipated such a strong recovery. We have corrected the situation as early as 2021 but our production processes are somewhat long. That's why it relaxes a bit now.

You are talking about long production processes.

Indeed, the 2023 harvest, for example, will only arrive on the market in 2027 and more probably the years after, especially for some prestigious cuvées. So, if you remember, in 2020 the harvest was a big one and in 2021 it was a very small one. We have marketed around 10000 kg/ha while we only had 7,000 kg/ha. With the 2022 and 2023 harvests, we already know that we will be able to fill our reserve cuvées.

The French sparkling wines compartment underwent a serious shock during the Covid-19 pandemic, and decided to limit volumes, thus producing little in 2022. Yet the good vintages of the last few years and the charm of perlage instill confidence in buyers, despite inflation and price hikes, with a positive outlook for the next four years

By CHRISTOPHE ANDRIEU

The two last years put smiles on Champagne's winegrowers, no?

It was two beautiful harvests. Yes, we are happy. It means we will have some good wines in our cellars. And if the market goes up again, we may decide to get these wines off the reserves and supply the market.

How has inflation impacted Champagne wines?

Naturally, Champagne is the wine of celebration. And it's always correlated to global growth and even to morale. We can clearly see that the economic and geopolitical environment is not very optimistic. Inevitably, this impacts the consumption. And in this general context of inflation, it's sure that Champagne is not a basic product.

What kind of Champagne wines are suffering from inflation?

Naturally, the entry-level Champagnes are suffering a little bit more. But large retailers anticipate very well the trends. Last year there were few promotions and this year there are even fewer.

So, there is a correlation between global mood and consumption of Champagnes.

Usually, yes. But there are also counter-intuitive situations. In 2020, clearly, people stopped drinking Champagne. But, we can also notice that in 2021 a lot of people went to their wine shops to buy and drink Champagne unless the period was not very cheerful.

Is Champagne still perceived as a celebration wine?

Yes, but not only. With Maxime Toubart, president of SGV (syndicat général des vigneron, the winegrowers) we have visited a lot of foreign countries during the last months, like Australia, Japan, UK or Italy. What we heard a lot from our distributors is that, more and more, Champagne takes a place in gastronomy. It is drunk at the table, not only for some festive reasons. And what they said is that Champagne wines remain

the best quality-price ratio of great wines. It's a strong response from the markets we observe.

Last year, a lot of French wine shops thought they had been abandoned to profit from export markets.

We heard this last year, specifically by the end of the year. Yes, we had fewer Champagnes to sell but wine shops still remain our ambassadors and Champagne sellers are very important for us. I think there will be fewer tensions this year and the years after.

Are the export markets all on the same trend?

No, it's not quite uniform. Some markets have recovered very strongly after Covid like the USA. But, this year the situation is normalizing. Last year, we set absolute records there. A lot of people did receive some money from the government to compensate for wage losses. A lot of this money has been spent on fun expenses. But this year, the USA market is down from last year. On the other hand, a market like the Japanese one was at a complete standstill until last year because the restaurants were closed and Japanese people don't drink at home. Now that it is reopened, it will change a lot. And some markets like South Korea or Thailand are developing very well too.

What are the more important markets?

We are always happy to develop new markets but we have also to remember that

our main production is sold to three countries mostly: France, USA and UK. These three countries represent 200 million bottles.

And Italy?

It's a wonderful market. First, Italians are great wine connoisseurs and they are in love with Champagne. It's a market where prestigious or premium cuvées are more present than elsewhere. They appreciate the beautiful and the good and their cooking is always good for Champagne pairing.

We have talked a lot about volumes but prices have also risen. Will these price increases offset the decrease in volume?

No, it's very likely that we find the price increase in the decrease in volume. But, global sales revenues will be close to last year's.

Did you notice a real increase on the prices of the Champagne bottles?

First, there is global inflation. It's not unique to Champagne. Most of the prices have risen and we have also to point out that we have greener practices. And to produce greener is always more expensive. But we must also note a phenomenon of more valued cuvées. More and more, producers are doing prestigious cuvées, rosés or vintage cuvées. These cuvées are always more expensive than a classic brut Champagne. The prices of the bottles are determined by the producers only. As president of Cive, I can only control the volumes. Of course, volumes will impact some prices.

This economic and producing steering system is quite unique.

Very few regions in the world are doing it like in Champagne. If the volumes are too small and the prices too high, you'll take the risk to go out of the market.

If volumes are too big, prices can collapse. That's why we always try to regulate at best. Our regulation mode tries to avoid sudden blows.

So, are you optimistic for next year?

Yes, we are. But, in Champagne, we never reason for the next year. We have a global perception of the next four years at least. Of course, the last four years have been quite caricatural. We have experienced just about every situation! And yet we are very confident in the desirability of Champagne. We are making constant efforts to always be better.

David Chatillon



 France

After a crazy year with enormous demand and little supply, an increase in volumes and a slight drop in consumption are bringing the Champagne denomination into a balance. But in the meantime prices have risen and promotions are gone

By CHRISTOPHE ANDRIEU

The last three years could have sometimes been compared to a bowling game with some improbable upside-down situation. Even if it has impacted Champagne as well, this region has a great ability to adapt its production to the whole market. After a year of record sales, things seem to go back to a more normal way. Adaptation and export are the two big words in Champagne. In very few years, wine markets have been turned upside down. Champagne as well. After the big drop in consumption during the Covid, last year has been a historic one in terms of sales. While demand fluctuates from top to bottom, production might be impacted a lot by harvests. After the small one in 2021, the two years that followed have been great. But the specificity of this region is to constantly adapt to markets. It takes some time for the ship to change course. But it does. As the president of Civec, **David Chatillon** (as you can read an interview on the side) noted a return to normalcy.

The Roller Coaster Generated Price Hikes

Naturally, last year has been quite a crazy one. Almost everybody in the world was searching for boxes of bottles of Champagne with a certain frenzy, USA in the lead. Even in France, a lot of wine shops or sommeliers were disappointed to find out that they were no longer on the list of some producers or with lower quantities compared to a normal year.

"We discovered what allocations mean for Champagne as well, like for wines from Burgundy," said **Pascale Guillier**, owner of wine shops in France and Belgium. "The last year has been quite crazy," noted **Xavier Millard**, general director of Maily Grand Cru, a big French cooperative which produces more than 500,000 bottles a year. "But it's getting back to normal. Last year, we had fewer products and the demand was very high. But, a lot of buyers had anticipated this phenomenon because they thought they

wouldn't be supplied and the problem became even bigger." Now, with an ability to commercialize a little bit more in 2023 and a demand that decreases a little bit, we may return to more usual campaigns. But in the meantime, prices have increased. And sometimes a lot.

"I think that the more important thing is to observe the disappearance of promotional prices," admitted **Vincent Rapeneau**, GH.Martel & Cie general director. "In France for most of the mass markets Champagne was a loss leader with interesting prices on great volumes. But 'Egalim' law (a French act dubbed as the 'Feeding Law') no longer allows it. And we have also been able to sell our bottles on some export markets with more valued bottles." For him, that's the main reason why prices have increased besides inflation and production costs. Mainly, the lowest prices have disappeared. Mechanically, the average price has increased. But not only. "Everybody is aware that raw materials have also increased," he said. "And new environmental trends are there too, like Hve (sustainable agriculture). It's another way to increase our production costs."

Growth for Special Cuvées

There's probably another reason for these higher prices. Brut Sans Année (Bsa) is still the most produced kind of Champagne (usually a blend of the big three grape varieties - Pinot noir, Chardonnay and Meunier - and a blend of three different vintages at least). But, it's been many years now since a lot of producers are making more elaborate cuvées (vintages, special cuvées with a lot of reserve wines, parcels, varieties, specific dosages or rosés Champagnes). And, usually, these cuvées cost much more than a regular Bsa. When a normal brut is between 30 and 40 euros, a specific cuvée starts at 50 and can reach 250 euros and we are not talking about some very rare Salon or Delosse cuvées.

"Indeed, we are making more and more of these kinds of Champagnes (30% of the production)," Mr. Millard from Maily Grand Cru recognised. "And, for these specific cuvées we are now using the system of allocations. But the biggest increases in our prices have been done last year. Now, we're on a more normal way." Actually, statistics prove that demand is lower than last year.

"What we have done last year couldn't have been done for a longer time," he said. "We have to remember that with the covid situation we've gone from 300 million bottles sold in 2019 to 240 million sold in 2020 and then 324 million in 2022. No one could predict this."


THE PRESTIGIOUS FRENCH BUBBLES RESPOND WELL TO MARKET TWISTS

Back To NORMAL



Vincent Rapeneau



Xavier Millard

This incredible rebound mostly came from a huge demand on the export markets. "In France, the market is more mature," he continued. "People still want their Champagne. On some export markets it has been more a question of opportunity, the simple way to celebrate the post covid situation has been huge sometimes. And Champagne is still the great wine of celebration."

For this great cooperative, the export market isn't an unknown territory as 66,68% of the 500,000 bottles sold every year are going outside, to the USA first, then UK, Belgium, Japan, Italy, Germany and Switzerland.

For Mr. Rapeneau, general director of GH Martel group (Martel, De Cazanove, de Bligny, overall 6 million bottles per year), export has developed very well, at least for the last ten years.

"We have a lot of people based in foreign countries and we gained a lot of new customers," he said. "Now, our production is sold by 70% on the export markets. This is where we can value our brands. But we will never forget our national market. We were born there, we grew up there. We just have to adapt ourselves to the global demand. Like the whole Champagne region is doing. It's probably one of the most intelligent regions to regulate its production. In Champagne, you never hear about pulling the vines out."

That's probably a good closing word. Even when the world is going upside down, Champagne is still able to follow its own way.

OPERATORS LOOK AT THE FRENCH MARKET

Festivities Still RHYME WITH BUBBLES

By CHRISTOPHE ANDRIEU



Didier Bonnefont

End of year celebrations are still a good period for sparkling wine consumption. "There's no doubt about it," said **Didier Bonnefont**, buyer from Auchan, who specialises in sparkling wines.

For mass-market retailing it's obvious. "Every year, we see a consumption peak for sparkling wines during the festive season and mostly for Champagnes," he said. "It's the same for sweet wines."

And this year, supermarket distributors don't worry about the current situation which could be affected by inflation and/or lack of Champagne bottles.

"We're not so sure about this shortage, it's quite well managed by Champagne producers," he said. "We all know that the French market is first impacted by some decisions. Champagne produc-

ers want to sell more bottles to foreign markets. But, for sure, one thing has changed. It will be very hard to find low prices and promotions on Champagne this winter. That's why mass retail has anticipated a significant decreasing trend in volume (around 15%). But prices have increased about 10%."

It will be somewhat well-balanced at the end. With such facts, we can easily guess that Champagne's consumption will be affected.

"Yes, probably but only for the lowest prices," Mr. Bonnefont said. "Consumers who want Champagne will still buy some bottles but, of course, consumers who only bought Champagnes because of some promotional opportunities won't buy Champagne this year. To be clear, it will be quite impossible to find a Champagne wine between 12 and 15 euros."

A short place for other sparkling wines

The lack of Champagnes has been a real topic since last year, not only for the mass market but also for traditional retailers. With some wine shops in Belgium and two others in the north of France, **Pascale Guillier** is very concerned by this lack of Champagne.

"In comparison with last year, some houses won't give us everything we wanted," Ms. Guillier said. "For example, Ruinart has reduced by 20% its allocation. And with some great but smaller producers it's even worse, like half of our demands for Champagne wines from Larmandier or De Sousa! We are terribly limited."

And for a winter period, it's quite a pity. "As I'm in Belgium and in France, I can see both sides and it's quite different," she added. "In France, customers want to buy Champagne and

 France

only Champagne for the festive season.”
In her French shops, she usually sells a lot of sparkling wines, 90% from Champagne and only 10% for other bubbles. It’s around 7600 bottles of Champagne in a year and only 610 bottles from other sparkling wines.

“And I also have an activity of gift boxes,” she said. “People always want nothing else than Champagne. But it’s quite logical. In France, when you have a welcome drink, it’s mostly a Champagne glass. When it’s a matter of a party, it’s Champagne again. People are used to drinking Champagne during the whole year, so, by the end of the year, it’s the main reflex to buy some more bottles of Champagne. In Belgium, it’s quite different. Customers are more open to other sparkling wines. It’s easier to sell them other bubbles even if Champagne is still well appreciated there. And, there’s no doubt about it, for Champagne, the incidence of the festive season is more important there than in France.”



Pascale Guillier

So, is there any place for other sparkling wines besides Champagnes?

“In Belgium, it’s a reality, we already sell some Spanish sparkling wines or some Italians like Prosecco,” she said. “Mainly, this last one is bought for the spritz cocktail. In France also we are able to sell Prosecco. The only problem comes from the transportation costs. If not, I’m sure we can sell even more of these wines. We are also selling a lot of sparkling wines from Doc Trento, specifically from the Rotari brand. But, now, I can also say that in Belgium customers are more and more inter-



ested in our local production of sparkling wines. But the other sparkling wines we are selling the best are also coming from France. There are a lot of good ones for cheap prices there.”

Prosecco in the Game

We can guess that selling other sparkling wines in wine shops may be easier, but is it the same scheme in large scale distribution?



“Not for all the sparkling wines,” Mr. Bonnefont, the buyer from Auchan, admitted. “We all know that we can find very fine products in Franciacorta for e.g. but to sell this kind of wines you may have someone to recommend you, to explain these wines only known by wine connoisseurs. We don’t have these kinds of sellers in our big shops and I’m not sure you will be able to find some Franciacorta in a French supermarket. But it’s quite different for Prosecco. Actually, the trend is very positive for this appellation, mostly because of the spritz phenomenon but not only. Some customers do like Prosecco for what it is and not only for the cocktail’s aspect. The only problem remains the price. If you talk about a Prosecco sold between 5 and 6 euros a bottle, it will be a large success and you will easily sell 15,000 bottles. But we already try to sell more valued prosecco at 8 or 9 euro a bottle and it has been much more difficult. In this case, you can only target 4,000-5,000 bottles maximum.”

But is there a real market for other sparkling wines from foreign countries, even during the end year celebrations?

“I suppose it’s not so easy for the wine shops but in our bigger supermarkets we can monitor a real increase of our sales,” Mr. Bonnefont said. “For the prosecco we have noticed an increase of 10% in volume and 12% in value. That’s quite interesting but, of course, we are not talking about the same volume of Champagne.”

But, globally, the sparkling wines market is decreasing by 2% in volume. With higher prices (between +6% and +8%), sales revenues will still increase by 1% this year. So, who are the real (but small) challengers of Champagne?

According to Mr. Bonnefont, they are mostly French Aoc.

“Alsace is doing well again, Loire or Bordeaux sparkling wines are quite well appreciated,” he said. “It’s a little bit more complicated for Burgundy because of the lack of products. For these French appellations, the trend is positive with a +5% increase but the matter of the price is also very significant. If you remain between 6,20 and 6,50, you will sell them quite easily. For those that are above 10 euros, it is very difficult to sell these bottles.”

But if it’s impossible to find some Champagnes between 12 and 15 euros, is there any possibility to replace them with some good sparkling wine? Mr. Bonnefont said that he doesn’t believe such a possibility exists.

“When you don’t have any Champagne with such low prices, people who were buying them won’t replace them with something else,” he said. “Before, it was probably just a question of opportunity. They were buying the promotions and probably stored some of their wines.”

At the bottom of the virtual bubbles scale, we also may find the simplest effervescent wines, the ones you definitely won’t find in small wine shops but mostly in the bigger supermarkets.

“We are talking about effervescent wines with prices around 3,50 euros,” Mr. Bonnefont said. “In volumes, the decrease is about 10% but it’s quite well outweighed by higher prices, around 10%.”

Of course, there’s no way to compare a buyer of Champagne with this kind of effervescent wine. Definitely, the king of the festive season will be Champagnes even if they will be a little bit more difficult to find in France, even if prices will be a little bit higher. We are talking about a French appellation which sold a total of 325 millions of bottles last year. And most of them have been drunk by the end of December. Same trend this year, as usual.



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THE HOLIDAYS
REMAIN
IMPORTANT
FOR
SPARKLINGS

A Bubbly Christmas, WITH NO CRISIS OR SHORTAGE AHEAD

From large-scale retail outlets to wine shops, whether online or through specialized distribution, confidence prevails for the holiday season, thanks in part to product availability. It's a clear contrast over last year's shortage. Italian sparkling wines have also become a gifting alternative to Champagne

By ANDREA GUOLO

Traditionally, Christmas is the most important time of the year for sparkling wines in Italy, although year-round drinking is now well-established, with excellent sales even during summer. From a market standpoint, the months of November and December are still making a big difference. Expectations for the 2023 holiday season are good overall. Economic difficulties and ongoing wars are not limiting Italians from celebrating. Italians generally value connecting and sharing with friends and family. Bubbles lend themselves well to these celebratory gatherings. This may explain why, despite inflation and lower purchasing power, results for the year-end are not impacted. There is no shortage of Champagne and traditional method sparkling this year compared to 2022 thanks to a stable level of supply. Results from a recent survey of trade operators reveal that sparkling wines are not necessarily in competition with ready-to-drink or alternative products (low alcohol or zero alcohol). Cocktails have become especially trendy for happy hour (aperitivo). Globally, sparkling wines are often used as an ingredient for cocktails and long drinks, contributing to the increased sales in this category.

The Forecast

"We are confident it will be a good Christmas," said **Corrado Mapelli**, general manager and member of Gruppo Meregalli's board of directors. "Unlike in 2022, when the main Champagne players had already run out of wine in November, this year's stocks are full. This is also the result of a better management of allocations for the Italian market."

The category, according to Mr. Mapelli, is in excellent shape.

"It sells all year round. It is consumed throughout the meal. Consumers have increased their knowledge of the product," he said. "Finally, sparkling wine is also benefiting, along with whites in general, from current climate change".

For **Luca Cuzziol**, director of Cuzziol Grandivini and president of Società Excellence, the situation can be summed up as follows: "Crises strengthen family bonds and push people to spend more time together. Therefore, I don't foresee consumption slowing down. On the other hand, we can expect a rebalancing of the market where niche, ultra-premium products and alternatives to major brands will suffer most. As usual during hard times, the market leaders will emerge strengthened."

Mr. Cuzziol also doesn't fear any financial bottlenecks.

"Post Covid, payment times have shortened," he said. "The trend is to reduce orders, spreading them out over the year, resulting in quicker collections. Customers are more cautious and are avoid-

ing stockpiling, partly because the horizon is thick with clouds." At Signorvino, a leading chain of wine shops with catering, the forecast is decidedly positive for both table consumption and takeaway sales.

"We will grow between 10% to 15% with the bubbly category," said **Luca Pizzighella**, general manager of the company belonging to Gruppo Calzedonia.

An important addition, especially in terms of value, comes from Champagne, introduced to their portfolio a year ago. To date, bubbles account for 32% of total sales, with Charmat method (overwhelmingly Prosecco) accounting for 63% of volume sales, compared to 37% traditional method products, while percentages get inverted value wise. In terms of Signorvino's turnover, the Franciacorta appellation dominates the category, ahead of Prosecco and Champagne, which are followed by Trento Doc and Alta Langa.

"The younger age group is strongly attracted to Champagne, while Millennials and those older are attracted by Italy's main sparkling wines, especially Franciacorta," said Mr. Pizzighella.

In large-scale distribution, confidence is also confirmed by MD, a discount chain with over 800 stores in Italy.

"The critical moment on the consumption front allows us to approach new customers who recognize in our bottles quality and value for money," said **Marco Usai**, MD's wine specialist. "Our goal is not to sell fine wines, but to select the best value for money. The growth of discount stores, especially in wine where the brand concept is much more nuanced than in other categories, is increasingly the result of a conscious choice."

The desire to spend more time at home will also help the online channel, believes **Antonio Prati**, head buyer at Tannico, the Italian leader in wine e-commerce.

"We expect a rebalancing toward home consumption, which was lower in 2022, due to the explosion of the HoReCa segment," he explained. "For us, a return to the domestic sphere is a big advantage. Another end-season difference between 2023 and 2022 is the availability of Champagne, while Italian sparkling wines are struggling to meet demand because consumption has increased during the year."

How Big is Christmas?

To make a proper evaluation, we need to consider that the overall quantity of bubbles consumed all year around has increased. According to Mr. Cuzziol, for example, Christmas wine sales have tended to drop because sales have gone up over the summer and in other seasons, while the amount of Italian labels bought as gifts has gone up.

"Back in the day, giving a Franciacorta for Christmas was considered a low-prestige present and people tended to buy Champagne," Mr. Cuzziol said. "But nowadays Italian sparkling wines sell strongly and Champagne sells mostly out of people's homes. We also need to take into account that, after Covid, consumption is much more oriented to outdoors consumption, people spend time outside and, as a consequence, Christmas sales tend to diminish."

Mr. Prati from Tannico noted that the last quarter of the year confirmed how bubbles are strategic, with an 40% up of overall sales and 50% of the entire business, because "sparkling wine is the category that is less linked to the season, it sells all year around and, even if there is still a Christmas up, it is less focused on the Christmas time than in the past."

At Signorvino, Mr. Pizzighella explained that the sales volumes for bubbles in December and early January is around 30% of total sales.



Corrado Mapelli



Luca Cuzziol



Luca Pizzighella

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Marco Usai

Antonio Prati

CMB, THE 2024 SPARKLING WINES SESSION WILL BE IN ITALY

With its various sessions and satellite events, the Concours Mondial de Bruxelles (CMB), the well-known flying competition that started in Belgium, extends its reach to practically every continent. Italy will host the 2024 Sparkling Wines session of the CMB this year in Alghero from July 10-12 with approximately 60 judges from all over the world. This beautiful city from the northwestern part of Sardinia is located in an area of great historical and gastronomic interest, famous for its production of sparkling and effervescent wines made with local indigenous grape varieties



“There are some off-season sales, but sales in December remain very high and the contribution of parties, presents and festivities weighs a lot,” he said.

“Festivities, or more in general occasions, keep representing an important period for bubbles,” echoed Mr. Usai of MD. “It is true that trends are driven by Millennials, and Christmas and New Year’s Eve represent a chance to share the toasting tradition even for the Generation Z.”

At Meregalli, Mr. Mapelli noted a slightly different situation.

“For us, the Christmas season is not so significant, because we mostly focus on HoReCa and restaurants, with the constant strategy to push wine sales by the glass,” he said. “December is very similar to June for us.”

A Downward Shift?

The impact of inflation is among the main fears for the festive season in late 2023, but according to Tannico, projections are not looking gloomy. There is a tendency to think that consumers will leverage buying cheaper products.

“No one is going back, at most they will tend to buy a bit less. In

Italy we are noticing a strong focus on the concept of “anteprima” (en primeur), exclusivity, with the growth of niche products or special editions. This is obvious in Tannico, with our direct imports of Champagne,” Mr. Prati said.

Large-scale distribution is already facing declining consumption, but MD has responded by expanding and diversifying the offer.

“We have more than 20 continuous bubbles on the shelf, some offered only in the largest stores, covering the entire range of dosages and the main styles of winemaking,” Mr. Usai pointed out. “We are working hard on the restyling of some lines and formats, as well as developing a strategy promoting grape varieties and territories of origin.”

At Signorvino, the addition of Champagne has led to a rise of the average basket price, limiting a decline in sales. This doesn’t only hold true for French bubbles according to Mr. Pizzighella. He mentioned demand is significantly higher than supply for products such as Cartizze.

“In general, premium Prosecco with Cartizze and Rive has been well received by the end customer, despite prices that are close to those of the traditional method,” he said.

No Competition

Can competition from ready-to-drink, cocktails, no-alcohol and low-alcohol products limit sparkling wine sales? The answer is unanimous: absolutely not. “I don’t see these as potential competition” argues Tannico’s Prati. “They are a different kind of product. I don’t see ready-to-drink becoming part of the consumer habits of Italians either. Novelty creates comparison and is always interesting. Perhaps the potential competition is affecting more large-scale retail, which we don’t collaborate with” says Cuzziol. “We are also monitoring the world of wine cocktails, and mixology in general, in which bubbles are often the protagonist, as an alternative to the glass of sparkling for aperitifs” says Usai of MD. As Pizzighella of Signorvino confirms: “The ready-to-drink is easy to prepare and is trendy, but it does not affect bubbly wines, whose real competitor is mixology when it comes to cocktail hour”. The latter, moreover, features bubbly as an ingredient in the most widely consumed drinks, from the Spritz to the Negroni Sbagliato. In every case, concludes Meregalli’s Mapelli: “I don’t consider it a disruptive element because it is a different product, linked to a different time of consumption and targeting a different age group”.

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LETTING THE TERRITORIES SPEAK FOR THEMSELVES

LITTLE EFFERVESCENCE, DECENT PERFORMANCE

Not everyone in the Italian sparkling wine scene is in the mood for celebratory toasts. In addition to global uncertainties, from wars to custom duties, the recurring problem of value remains. Fortunately, so does the consumer's relationship with bubbles of all types during the holiday season. Let's hope it's not just a flash in the pan

By LUCA SESSA E FABIO CIARLA



The relationship between bubbles and holiday celebrations remains crucial for the sparkling wine market in Italy. Sale projections are confirming the popularity of this product amongst consumers. It's a trend confirmed by the Consorzi (consortiums or winemaker associations). They are the custodians of the territories, grape varieties and appellation specifications, who increase the value of sparkling wines through their promotional work. Growth trends or limited losses in volume, generally associated with positive figures in value, manage to overcome the setbacks of a market seemingly at a standstill, yet capable of rewarding quality. The positive projections recorded by the Asti DOCG and Prosecco DOC Consortiums recall loyal consumer habits, resulting from consistent marketing campaigns highlighting the quality of their products. Market trend analyses remain essential to pinpoint new consumption habits and understand how new con-

sumer groups may affect rising consumer demands. It is important to bear in mind the increasing popularity of cocktails used in aperitif and the increasing demand for alcohol-free products to make strategic decisions. A comparison of the consortium's different approaches reveals a common consideration. Cocktails may act as a bridge into the wine category for younger consumers provided the identity and characteristics of local bubbles are highlighted in the cocktails, without distorting their value and perception. The approach of most consortiums towards the no and low alcohol market is even sharper, with a general orientation focused on respecting production's consistency. Market data analyses and reflections on possible strategies and experimentation are therefore put forward, while there are no real intentions to deviate from appellation specifications to follow a trend incompatible with Italian sparkling wine's intrinsic characteristics.

THE FLOOR TO THE CONSORTIA

ALTA LANGA
ALTE BOLLICINE PIEMONESI
SMALL BUT BRIGHT, DOUBLE-DIGIT GROWTH IN 2023

"The holiday season is still the bubbly season. The increase in consumption of Alta Langa DOCG stems from more family gatherings during the holiday season, but also because our wines turn out to be very nice gifts on their own," explained **Mariacristina Castelletta**, president of the Alta Langa Consortium. The relationship between bubbles and festivities confirms the solidity of the appellation. "The Alta Langa DOCG stands out because of its uncommon characteristics: strictly vintage wines aged on the lees for a minimum of 30 months, with limited volumes," she specified. "This might explain why we are not facing some of the hardships that are affecting other appellations with larger productions than ours. We had a very good performance in 2022 and we are so far

registering double-digit growth for 2023." An online presence is one of the many useful tools used to reach new audiences and promote their main appeal: quality, sustainability and Italianness. It's a necessary strategy in the current context characterized by new consumer trends and younger generations less attracted by wine. "The market of ready-to-drink (RTD) consumption is completely different from that of Alta Langa," she said. "We are closer to the world of cocktails, which can become a door opener for new consumption opportunities" believes Castelletta. What about the low alcohol trend? "We are an appellation with a deeply rooted tradition connected to our area of origin, and for now, no and low alcohol wines are not a priority for the future."



Mariacristina Castelletta



CRUCIAL LAST QUARTER AND OPEN DOORS TO MIXING

The festive season is undoubtedly crucial for an entity with ancient origins such as the Consortium for the Protection of Asti, which was officially established on December 17, 1932. "Although we do not yet have official data, I can confirm that this quarter is very important for us, as can be seen from the great demand for Moscato d'Asti," said Director **Giacomo Pondini**. "But also from last year's record-breaking numbers in terms of bottling." A trend favored by their very low alcohol wines; a characteristic extremely appreciated on the international market increasingly interested in labels of great pleasantness. The rising trend of cocktail consumption during aperitif is quite positive for Asti Spumante and Moscato d'Asti. "It can represent the best way to attract young people who are normally not very interested in wine," he said. "Thus acting as a strategic ally for us. Asti counts on an annual production of around 100 million bottles (about 60 million of Asti Spumante Docg and 40 million of Moscato d'Asti Docg), 90% of which is exported. The growing demand for alcohol-free products comes from abroad. "A phenomenon that needs to be taken into account, but our wines are not simple soft drinks, so we believe that our sparkling wines cannot be placed on the same shelf as alcohol-free products."



Giacomo Pondini



Silvano Brescianini



A TWO-FACED VINTAGE, SLOW START WITH A FINAL UPSWING

"The year 2023 opened with a positive sales trend in the first month of the year, followed by a difficult period between February and June, which marked a drop in volumes compared to the same months in 2022," said **Silvano Brescianini**, president of the Consortium for the Protection of Franciacorta. "Overall, the first half of this year reports a variation in estimated volumes down -7.4% compared to the first six months of 2022. On the other hand, as far as orders and sales related to the Christmas period and holidays in general are concerned, projections indicate that we are in line with the figures recorded last year." Twenty million bottles of Franciacorta were sold in 2022, 11.5% abroad. The domestic market recorded a slight decline

(-2%) last year compared to the previous year, a figure balanced by exports, which expressed a comforting growth rate. Switzerland confirmed its leading position among the various foreign markets, followed by Japan, the United States, Germany and Belgium. The forecasts and projections for the last quarter of this year are confirming a recovery compared to the first period of the year. A deeper look into sales from January to June offers a precise overview of the shares occupied by the various types of wines of the appellation. "In the first half of 2022, 74.1% of global sales were represented by Franciacorta, 14.2% by Franciacorta Satèn and 11.7% by Franciacorta Rosé," Mr. Brescianini concluded.

BIG GROWTH, YET MORE PROMOTION IS NEEDED

"The world of Italian sparkling wine is certainly very active. There is more and more talk about bubbles and especially about **metodo classico**, which has become a staple of 'Made in Italy,'" explained **Carlo Veronese**, director of the Consorzio tutela vini Oltrepò Pavese. "Consortia like ours have the task of generating greater awareness

around the value of the Docg Oltrepò Pavese, which focuses primarily on the Pinot Noir grape variety, with surprising and historic results." Active since 1977, the Consortium for the Protection of Oltrepò Pavese Wines manages an important historical appellation covering about 13,000 hectares, extending 440 kilometres of hilly terrain and producing about



65% (including all types) of Lombardy's total wine industry. The region is also the third largest Pinot Noir production area in the world. The production of the traditional method Oltrepò Pavese sparkling wine, the flagship of the appellation, is on the rise with an estimated increase of 20% by the end of 2023, raising thresholds reached in 2022 and 2021.

CARLO VERONESE





CLOSING IN RECOVERY, BUT THE CHALLENGE IS POSITIONING



Luca Giavi

The Consorzio di Tutela Prosecco Doc includes 11,000 wineries for almost 25,000 hectares of vineyards. Every year, it carefully monitors the holiday season market data. "At the beginning of the year, our goal was to limit to -3% the possible loss of bottled wine compared to 2022. We currently don't have this year's final data," said **Luca Giavi**, director of the Prosecco DOC Protection Consortium. "The -1.1% trend this past October in bottling production, which usually mirrors market trends, comforts us and helps us forecast a positive closure for 2023. It is moreover crucial to convey a fundamental message to customers and make them understand that our wines are not simple soft drinks and are always available. Prosecco is



the expression of a territory. Something more than a sparkling wine, but an actual appellation of origin. With this in mind, we are trying to occupy an ever-growing slice of the market."

It's a large and varied market that is regulated by very precise rules in terms of opportunities for the Consortium.

"The no and low alcohol market is a phenomenon that deserves attention and must be monitored to understand its developments," Mr. Giavi said. "It could represent an opportunity for the world of wine, but it is certainly not interesting for our appellation," says Giavi. While the no and low alcohol market is of little to no interest in Prosecco DOC, the cocktail scene, on the other hand, is very promising. "Not so many people prepare Spritz using Prosecco as they would rather use generic sparkling wines. Yet, we have always believed in the potential of wine-based cocktails. The Kir Royal, which involves the use of Champagne, is a good example."

DOWN FROM RECORDS, BUT BETTER THAN PRE-PANDEMIC



PROSECCO SUPERIORE
DAL 1876



Diego Tomasi

"The first six months of the year were quite difficult and fluctuating, with often negative figures even in the double digits," said **Diego Tomasi**, director of the Consortium for the Protection of Conegliano Valdobbiadene Prosecco Docc. "Since August we have been registering a readjustment with values close to -2% or -3%. In the first 10 days of November we were up 10% compared to last year, which had already set a record with 80,000 hectoliters bottled. In just the first days of the month 30,000 hectoliters were processed, representing a really comforting figure.

This leads us to think that we could close the year with a negative figure of -6% for absolute volumes, better than those recorded in the period 2016-2019, and lower only than the most recent records (2021 and 2022 - ed.), which were, however, undoubtedly conditioned by the pandemic."

The number is in line with final figures for 2022, which recorded sales of 100,081,088 bottles with an economic return of nearly 607 million euros. The Italian market, which accounts for 60.2

% of sales, absorbed 57 million bottles in 2022, worth 365.5 million euros. Those were record numbers last year, especially when compared with the approximately 90 million bottles in the latest pre-Covid data, surpassed by forecasts for 2023 that speak of a total of 93-95 million pieces at the end of December. The inverted trend that is taking place at the year end seems to be the result of a thorough work to give value to the product's identity, identifying some elements that are key to the denomination.

"The first element is surely the territory, its history, beauty and vocation," he said. "This allowed it to become a UNESCO World Heritage Site, and all of this adds to the value of Valdobbiadene. The territory and its products are more so connected in tourism choices and wine tourists, which this year have recorded record numbers, even more than 2019." Focusing on the territory is the basic rule without neglecting the wine product, also thanks to experimental activities, as in the case of cocktails. Quite a different approach, on the other hand, has occurred with products with no and low alcohol content, a trend that should not be underestimated because it is growing rapidly: in the U.S., four out of every 10 bottles of wine sold are no and low alcohol. "Our Glera grape variety could be a good contender because of its ability not to concentrate too much sugar, allowing it not to exceed 9/10 degrees alcohol, reaching 11.5 with the addition for sparkling. Experimentation is underway to obtain a 9.5/10 total degree product. It is still a work in progress because the main objective is not to distort Valdobbiadene," Tomasi highlights.

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It's difficult to make predictions without accurate data, but the recent positive numbers for September sales bode well. "Our observations provide final data in the January-February period and the unknown factor related to the Christmas period in a weakened economic context does not give us any certainty, although the latest figures are

positive," said **Enrico Zanoni**, general manager of Cavit and president of the Trento Doc Institute. "We are confident the current trend will



Enrico Zanoni

continue growing, even if more slowly. We are confident that the rising recognition of Trento DOC is opening the door to more distribution for its members, both domestically and abroad, although the context is less favorable than in the past."

In the last 10 years, Trento DOC has been growing at a higher rate than the market, and the institute is optimistic about the possibility of further increases and a broadening of the critical mass among consumers, albeit at a slower rate than in past years. The acquisition of new market shares inevitably brings up new reflections on the table. "Competition should be understood more broadly than only those producers who are making sparkling wine from the traditional method," he said. "Trento DOC enjoys an interesting popularity among young people and women, especially abroad where trends relating to cocktails could lead to untapped opportunities."

The scenario seems quite different when it comes to no and low alcohol products.

"Regardless of legal constraints and regulatory difficulties, the idea of making proposals stepping outside of the appellation's specifications will never be on the agenda, because the peculiarities and characteristics of Trento DOC must continue to represent the territory, asserting itself while respecting its identity," Mr. Zanoni stressed.



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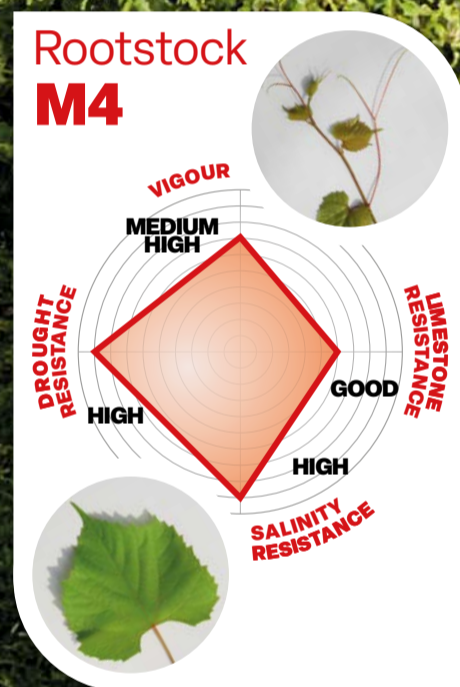
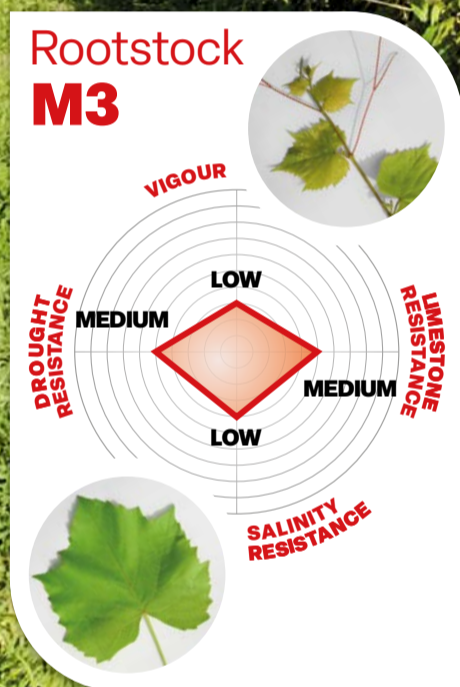
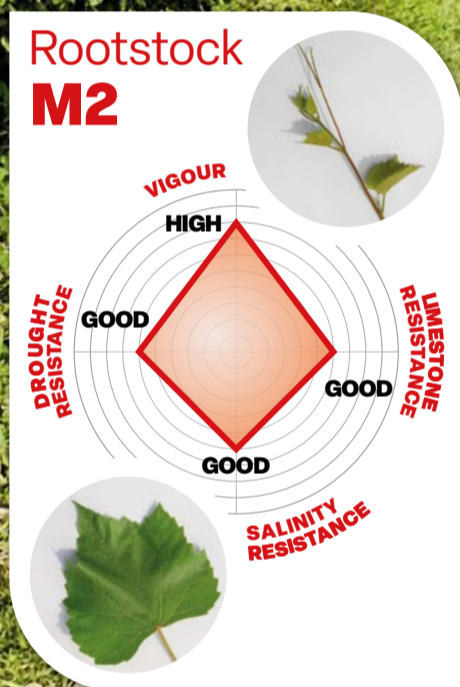
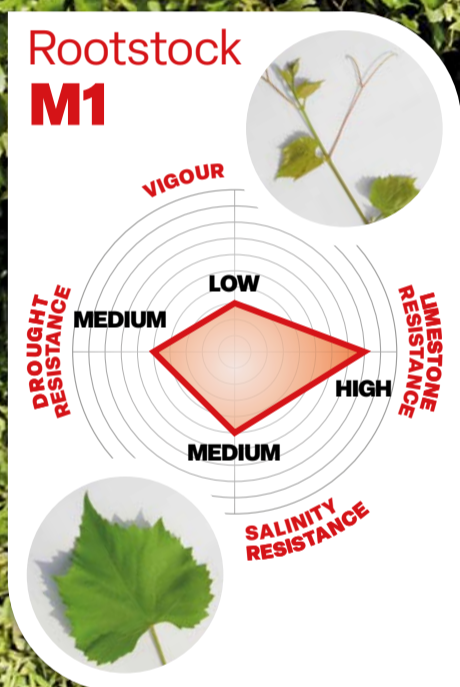
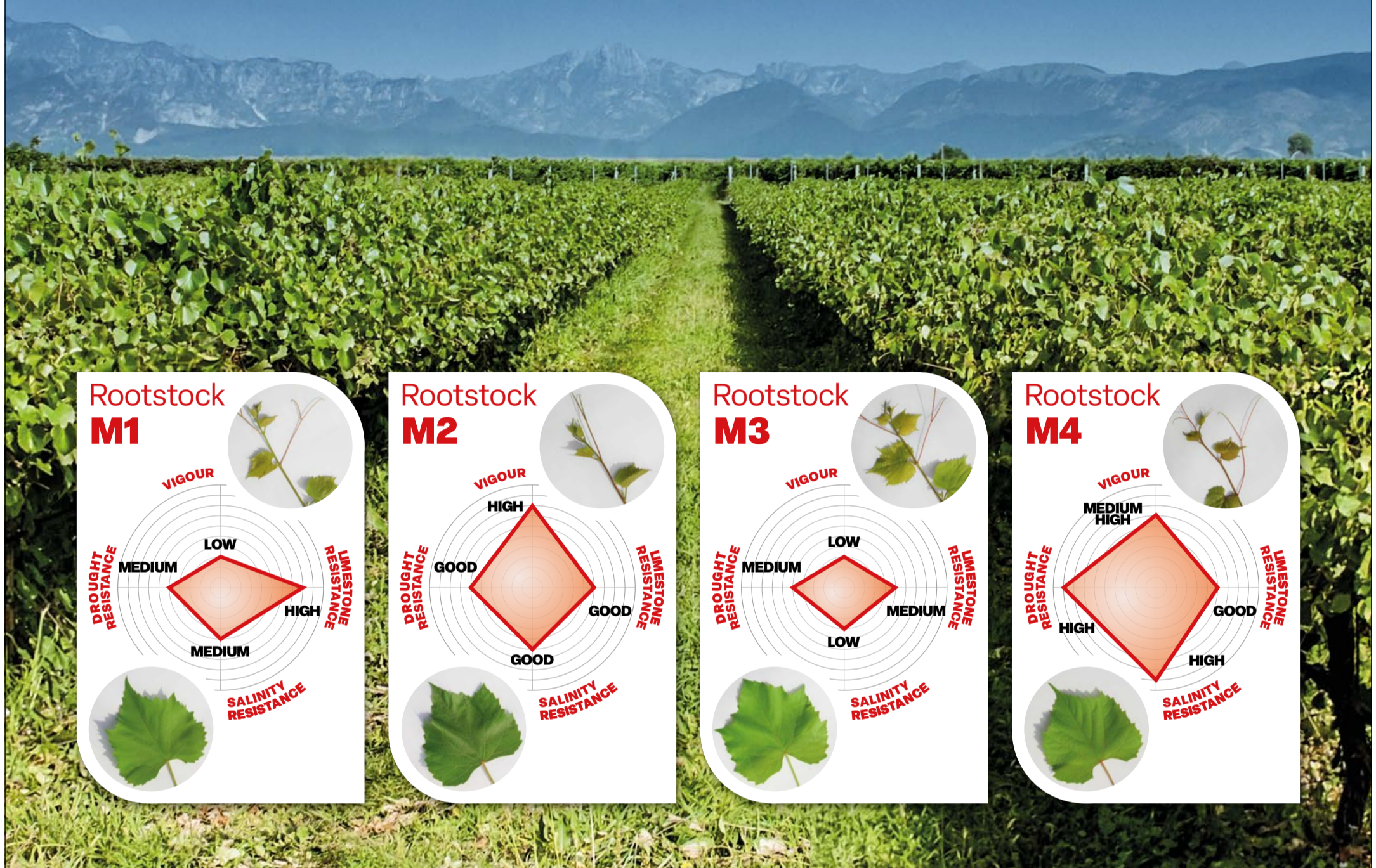
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“Sparkling Wines Continue to Grow, in Asia as well. Mark my Words,”

says Michel Rolland

Michel Rolland
and journalist
Mi Yeun Hong



We asked the world's most famous oenologist to comment on the current state of sparkling wines at the international level. Mixing irony and disillusionment, Mr. Rolland doesn't mince words when he speaks of the world's most popular sparkling categories: Champagne is too expensive; Prosecco is the result of a lot of marketing; Cava suffers from uneven quality. Looking to Asia, where he is spending more and more time with his own production, the future looks bright

By MI YEUN HONG

“I grew up in wine; my family produced wine. I don't think I ever really wanted to do anything else other than wine,” Michel Rolland passionately explained at the beginning of our interview. Perhaps the world's most famous oenologist, he's the man behind the catchphrase *flying winemaker*. Throughout his career, he has consulted for hundreds of wineries spread across 24 countries in every continent. These include Grands Crus Classés Bordeaux Châteaux like Angélus, Ausone, Pontet-Canet, Pape Clément and Troplong Mondot, as well as world-famous Italian brands such as Masseto, Ornellaia, Caprai and Monteverro, not to mention securing contracts in Greece, Bulgaria, India, the USA and Chile. Rolland has now almost completely stopped consulting and mainly travels the world as a wine producer to promote his wines. We met him in Seoul, South Korea as he was introducing the latest vintage of his legendary wine 'Iconic' from his Rioja winery Botega R&G Rolland Galarreta. (He owns many properties across Spain, South Africa and Argentina.) With a career spanning 50 years, Rolland does not shy away from the most biting and explicit analyses and provocations, leaving plenty of room for irony in his answers regarding a world of wine seen with a disillusioned and somewhat complacent eye. When asked to name three of the best wines he has ever made, he simply said. “I don't remember. When you are a consultant, people don't like it when you remember too much,” he said. “If I had to choose three over the 900 wines that I was involved with as a consultant around the world, of course I would be left with 897 enemies. I have made very good, cheap wines and great, expensive wines too, so it is not easy to choose.” Rolland experienced an important evolution during his 50 years in the field of oenology confiding: “Everything changed since I started in 1973, from cars to planes, not to mention the television and the telephones. Wine also experienced something similar.” One of the main criticisms of the world of consulting winemakers, starting with the most popular, has always been the standardisation of winemaking techniques. It's something that Rolland swiftly rejects, explaining that there is no such thing as a standard formula. “If people use a recipe when making wine, they are making a mistake,” Mr. Rolland said. “Because every vintage is different, every location, every variety is obviously different. You are faced with something new every time. You can't have a one-size-fits-all approach or idea on which to base your work. Experience is the key to winemaking, because what one always needs to do, no matter where we are, is to understand the grape. Understanding grapes is like understanding people; you must deepen your knowledge with time.” His deeply rooted vision was handed down by a great historical figure in oenology: “If you ask me who's my mentor, the answer is simple: Emile Peynaud. He's the one who started the New Era of Wine,” said Mr. Rolland. “He paved the way for a completely new way of making wine. We are only a few students that truly

learnt directly from him and kept in mind one important lesson: work hard and be humble.” That lesson is more relevant than ever, according to Rolland. “Work, work, work is the only piece of advice I would give future winemakers that want to achieve excellent wines.” Speaking more in detail about the wines he has made and the challenges he met in the exotic places where he has worked, the famous French oenologist recalls: “My most challenging project was in India. When I first got there, there were no vines planted, no wine culture whatsoever and nobody knew how to work in the cellar. The first year was dedicated to the development of viticulture for the country, very different from the traditional one. The soil was not ideal and the climate not quite right for making wine.”

ROLLAND AND SPARKLING WINES

From France to Italy, passing through Spain, sales of sparkling wines had not stopped growing for the past 10 years, up until 2023, when clouds started gathering on the horizon of the bubbly category. Rolland's long experience as a consultant gave him a deep knowledge of the international wine markets. We asked for his opinion about the trend of sparkling wines worldwide. Although he has been less involved professionally with these wines, he's always loved them as a consumer. His opinion on the topic is lucid and uncompromising.

The impressive growth of sparkling wine sales experienced recently seems to have somewhat stalled. Are we simply going through a slowdown, or has the trend reached its peak? What's the future for sparkling wines worldwide?

Looking at the category as a whole, I think that sparkling wine consumption is still on the rise. However, Champagne, the most popular and widely distributed bubbly in the world, has seen its consumption go down, in part due to

increased prices that were not entirely justified. Simply put, Champagne has become far too expensive in recent times. Yet every time there's a 'boost' in the market, usually consumption tends to go down. I think this is something momentary. In a nutshell, sparkling wines have a bright future ahead of them.

For some years now, Champagne and Prosecco are the most well-known and most drunk sparkling wines in the world. Will their popularity continue growing, or can a competing product come and shuffle the cards? Can Cava or some other appellation topple the two giants?

Champagne remains the leading product in the sparkling category, although Prosecco has undeniably increased its appeal worldwide. This success, I believe, relates mainly to its 'easy drinking' character, as opposed to a particular 'superior' quality. Prosecco producers were very good at marketing themselves and managed to increase their sales to impressive levels. Another aspect to consider is the price difference,

This made Grover (the Indian company with which Rolland has been involved since 1994) the biggest challenge of his life. With such a rich experience working around the world, which grape variety has challenged him the most? “Pinot Noir,” promptly answered Rolland, noting how difficult it is to obtain homogeneous Pinot Noir grapes, even with a careful selection. “It's a grape that's very sensitive to climatic conditions,” he explained. “Even during the vinification process, it is not very reactive, which increases the risk of making extraction or maceration mistakes. One needs to be very precise to get the best result with Pinot Noir, which can produce wines that are easier to appreciate in their youth and quicker to drink than other more tannic grape varieties. Today, I would say that New Zealand is working well with Pinot Noir, as is Oregon and California.”

with Italian wine responding better to market demand. There are more consumers able to afford a bottle of Prosecco than a bottle of Champagne, so sales of the former are necessarily higher. Cava on the other hand, the third in terms of volume in the category, is facing a problem of uneven quality standards. Some are good and some are not. This is not optimal for the branding of this style of wine. Cava has what it takes to play an important role in the sparkling world, but it is up to Spanish producers to step up their game and make wines that fit the market demand.

The Asian market does not seem to appreciate sparkling wines so much, except for Champagne. Is the situation set to remain this way or is there room for other sparkling wines on the market?

This is a very important issue. Asians are generally not very fond of sparkling to begin with. Why they still drink a lot of Champagne is probably due to a bit of snobbery, to assert one's social status in short. I apologise for being so honest about it, but most Asian people

**A DISCUSSION
- WITH
PROVOCATIONS-
WITH THE
LEGENDARY
“FLYING
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drink Champagne because it is festive and suggests a high social standing, even if they might never have really enjoyed sparkling wines before. I am however convinced things are evolving, and bubbles will be appreciated more and more in the future. There is no good reason why Asia should not follow the rest of the world.

As an experienced international technician, do you know about the latest developments in the field of sparkling wine production?

This is a difficult question. I think that throughout such a vast and varied production, innovations are meant to come up. The quality of Prosecco 15 years ago, for instance, was not very high in general, whereas today it is more than drinkable. The success of the Spritz, which accounts for 40 % of the total Prosecco consumption, has also contributed to its popularity. In terms of innovations, sparkling wines, like all brands and consumer goods, will need to innovate. Vuitton and Gucci are coming up with new products every year and so will wine, including the sparkling category.



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USA

NORTH AMERICAN MARKET'S OUTLOOK

THE US MARKET

Between Destocking and a Consumption Drop. But Bubbles are rising

By LIZA B. ZIMMERMAN

Bubbles have historically struggled on the U.S. market and have long been consumed primarily for festive occasions and sometimes as aperitifs. However, that sales pattern has been changing for some years as American consumers warm to their food-pairing flexibility and enjoy them more regularly. According to a November, San Francisco-based Wine Market Council (WMC) study, about one-third of sparkling wine consumers said bubbles paired better with food than other drinks, according to **Christian Miller**. He is the WMC's research director and the proprietor of Full Glass Research, a Berkeley, California-based wine analyst. Holiday sales, for most types of sparkling wine — both domestic and imported — still remain strong despite their overall sales decline in the U.S. market, according to a number of data sources.

Sparkling wine, of all types, had seen an uptick in sales over the course of the pandemic when sparkling wine shipments “sparkling wine shipments into the market declined significantly through fall 2022 versus 2022. In contrast, they grew modestly in 2022 and grew robustly from 2016 to 2021,” Mr. Miller explained, citing wine analyst BW166's data. However, this year, in contrast, he added that, “Shipments into the market declined 10 percent for the 12 months ending Oct 2023.”

Reasons for the Sales Dip

There are a number of causes for the past year's decrease in sparkling sales. Mr. Miller notes that part of this can be ascribed “to wholesalers and retailers trimming back inventory and some consumers drinking down their pantry stocking from the 2020 to 2021 pandemic stock-ups.” He added that “Most of the sparkling volume loss is traced to households cutting back on purchase frequency and less frequent buyers dropping out altogether. The remaining regular buyers, defined by purchases of at least six or more times a year, of sparkling wine slightly increased their purchases, driven mainly by switching from beer and hard seltzer.” According to the November WMC study, a higher percentage of consumers reported drinking less sparkling wine than the year before at 23 percent; than more of it; which 20 percent of consumers did.

“Marginal wine consumers, who drink wine less often than once a week, in particular, were cutting back,” he added. “However, among consumers under 40, Hispanic and African-Americans more were increasing rather than decreasing their sparkling consumption.”

Bubbles' solid growth in the last few years came to a halt in 2023 because of a series of contingencies. But pairing skills and drinking out-of-festivities may pave the way for another good time for sparkling wines

“The leading reason given by wine drinkers—who were reducing wine consumption—was the reduction of alcohol consumption in general and this applied to sparkling wine consumers as well,” Mr. Miller noted. According to the WMC study and Mr. Miller, “reductions in wine purchases indexed higher among mid- to upper-middle income families in the household panel data.”

Data on Sparkling Sales Channels and Categories

The bulk of sparkling wines—from Crémant to Champagne and Franciacorta—are seen as luxury products and are more often sold on-premise with the help of a skilled salesperson. According to the Washington D.C.-based SipSource data—which is part of the Wine & Spirits Wholesalers of America organization and focuses on trends based on aggregated top distributor depletion data 26 percent of sparkling wine is sold on-premise versus 12 percent of still wine, according to Mr. Miller and SipSource data. Depletions by country show Italy with over a one-third sale of sparkling depletions occurring on-trade. The U.S. leads sparkling wine sales with 39 percent of the market share, but that is divided up among several categories of sparkling wine. France and Spain trail well behind Italy in volume, in terms of sales volume; all of which suggests that Prosecco is the top-selling category, shares Miller.

NielsenIQ's **Jon Berg**, who is the vice president of beverage alcohol thought leadership at the Chicago-based company, adds that annual data for most sparkling wine categories in

2023, ending November 4th of 2023, is somewhat negative. Champagne is down by 5.7 percent in dollar value and 7.8 percent in volume, average unit price and promotional dollars are flat. Prosecco leads the pack with an 11 percent increase in dollar value and a 7.5 percent uptick in volume: with an average unit price of \$13.12 a bottle. The appeal of Prosecco, he adds, is due, in great part, to its affordable sales price. He adds that it can often be confused for Champagne, by less knowledgeable buyers.

The last three months of the year remain a top sales period for sparklers of all types from all countries.

“Within the U.S., the fourth quarter [including Christmas and New Year sales] is the highest-grossing period for many sparkling wine brands,” said **Cody Jennings**, a senior vice president at the Sonoma-based wine investment analyst firm of Zepponi & Co. “However, the category overall seems to be benefitting from a broader trend toward ‘everyday’ versus ‘occasion-based’ consumption. Tasting room managers across U.S. wineries will attest to an increase in demand for sparkling wines year-round.” Champagne sales, in particular, see a solid boost around the holiday season, according to Berg. However, sales “are still very seasonally driven: NYE, Valentine's Day and birthdays. December in general, is very polarizing for all sparkling wine products,” he added.



Christian Miller



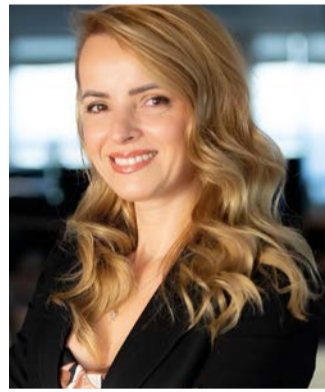
Jon Berg



Cody Jennings



Dennis Kreps



Daniela Oancea

Cosmopolitan and populous markets—such as California, New York, Florida, Illinois and Washington D.C.—will drive the demand for Champagne. States like Texas, Michigan, Pennsylvania and Ohio follow behind that, depending on the brand, he added.

What the Trade is Seeing

The Napa-based Quintessential Wines, which is both a distributor and an importer, with a portfolio of sparkling wines, such as crémant, Champagne and other bubbles from places such as South Africa is seeing a solid sales year.

“The biggest growing categories are the lowest-priced ones, under \$20,” noted **Dennis Kreps**, the company's co-owner. Major retailers are also seeing a dip in sales of bubbles.

“Sparkling wine sales have been vigorous over the past five years, especially during 2020 to 2021 and there's been a slight decline in 2023 [sales],” said **Alex Poreda**, the vice president of sales for the 126-location, Orlando-Flori-

da based ABC retail wine chain. The store offers more “than 100 selections of sparkling wine, priced from \$7 to more than \$1,000 a bottle.”

He added that while Italian Franciacorta is a hand-sell, he also considers it to be an amazing value. He notes that Prosecco continues to add value, while “Champagne is still king on the premium side. We're also seeing other [categories] that are still very healthy including Cava and domestic offerings from California and Oregon.”

Champagne still holds a prestigious place on the market, despite that its sales have slowed by value under \$20.

“We are currently very excited by the performance on Prosecco and French sparklers,” added Mr. Poreda.

Niq's Berg explained that Champagne sales still remain very celebratory focused, in terms of consumption, and that bottles may not easily roll off shelves throughout the year. He added that it is often purchased about 1.2 to 1.4 times per year on average. And it is generally “special-occasion based. Exceptions abound of course, but the general tendency is Prosecco for every day and Champagne for special occasions.”

He continues to note that the main limitation of the sparkling wine category is that it is not attracting enough new consumers. “A lack of new consumer recruitment and a base of shoppers that do not understand or want to learn the category,” Mr. Berg said. “Most wine [including sparkling] consumers need a frictionless buying experience without having to take the time to be educated on product nuances. This is supporting the move away from wine and over to [ready-to-drink products] RTDs in general.”

He added that “Sparkling wine is highly fragmented in terms of product types, and price points” and that many categories of bubbles have seen a small dip in the 52-week period ending November 4th of this year.

Customer Knowledge is Questionable

While some in the industry believe that consumer understanding of the sparkling category is on the rise, not everyone concurs. Despite good holiday sales, most consumers aren't greatly invested in where, and how, their sparkling wines are produced, according to Mr. Berg. The “U.S. shopper in general does not understand the various products in detail,” he said.

“They tend to understand that Champagne is from a region in France, that Prosecco is unique [most miss that it is from Italy] and other sparkling wines tend to fall into the ‘all other’ group. Most avid consumers understand there is a difference between these products but they tend to gravitate toward price points defining quality.”

He added that general sparkling wine sales were down 3.7 percent in dollars and seven percent in volume, with an average bottle price of \$11.42.

Mr. Kreps at Quintessential disagreed.

“Consumers have a much better understanding of the stories behind wines, so they do care where they come from,” he said. “They might not understand the particular vinification method, but they know Champagne generally speaking means quality and they've welcomed Prosecco as a separate sparkling wine category.” He added that buyers are more open to enjoying bubbles for numerous occasions.

“They are no longer just for New Year's or someone's wedding,” he said. “People are embracing the fact that they can get a quality sparkling wine experience any time they wish. Social media has also played a role in diversifying the audience and usage times.”

Upscale cruise lines are also seeing increased interest in sparkling wines from their customers. Oceania Cruises, which has eight ships—that carry on average between 600 and 1,200 guests—and is based in Miami. The line is continuing to see an uptick in interest in Italian sparklers, among others.

“We are seeing a greater interest in these selections onboard,” **Daniela Oancea**, corporate beverage manager of Oceania Cruises, explained.

The line's newest ship, Vista, offers roughly 1,800 bottles of Champagne on offer priced from \$45 to \$1,430 a bottle.

Overall, the outlook seems fairly solid for sparkling wines, even though they still may be caught in the downward sales spiral of general U.S. wine sales.

Sparkling wine still has a very solid presence in the U.S. and has “endured several volatile cycles over the last five years. I would look for fairly flat growth overall next year for total sparkling wines. We haven't seen a lot of large-scale innovations on the horizon,” Mr. Berg concluded.

Without a doubt, category innovation wouldn't hurt the sea of bubbles struggling to get a foothold on the U.S. wine market.



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In the first half of 2023, sales of sparkling wines fell by just in the food retail sector fell by just 0.3 percent.

Sales rose by 3.7 percent to 1,439 billion euros, partly due to rising prices. In view of the five percent drop in wine sales by volume throughout Germany.

Meanwhile, no- and low-alcohol sparkling wines are becoming more and more popular among consumers

THE CATEGORY IS HOLDING ON WELL DESPITE THE DIFFICULTIES

Prices Are Skyrocketing, but SPARKLING WINES STILL SELL

By KATJA APELT

It's like so many things these days. It is not really clear what is happening on the German sparkling wine market. What is certain is that price hikes, which have been hanging over the market like a sword of Damocles since last year, and their impact have arrived in full on the shelves. Branded sparkling wines and sparkling wines such as the market leader Rotkäppchen (market share 37 percent, price increase from 3.99 to 4.99 euros), Freixenet Carta Nevada (price increase from 5.99 to 6.49 euros), Faber semi-dry sparkling wine (from 2.99 to 3.49 euros) but also the discounters' own brands cost significantly more in some cases than in previous years. Key price barriers have been broken and in some cases price points that have been in place for over ten years and have been learnt by consumers have been abandoned. At the discounters, the prices of own-brand sparkling wines are above 2.99 euros for the first time. Rotkäppchen has regularly cost 3.99 euros for over 15 years. "There has been a fundamental price shift of a good one euro in the entire sparkling wine sector. That's why the market has to re-sort itself. We are currently in this phase," said **Christof Queisser**, CEO of Rotkäppchen-Mumm Sektellereien GmbH, Freyburg.

But anyone expecting the sparkling wine market to be penalised for this rigorous price increase is mistaken. It is true that consumer movements towards cheaper products in the food retail trade (LEH) are visible in the market researchers' figures. However, there have been no major shifts in purchasing.

"In the first few months, some uncertainty was noticeable in this segment due to the general conditions. Now we are seeing more confidence again and the figures are developing," said **Rudolf Knickenberg**, Managing Director of Schlumberger Vertriebsgesellschaft mbH & Co KG, Meckenheim. "Prices have been realised and volumes have been growing again in recent months."

Wine importer **Stephan Pellegrini**, Managing Director of the Landau-based company of the same name, specialising in Italian wines, refers to the market as a whole: "The general price increase has affected and continues to affect all provenances, so major movements between these origins are more a question of current consumer preference and the result of the good work of the wineries and distributors."

Still A Stable Segment

Looking at the market researchers' figures, the results in the food retail sector are surprisingly stable. According to market researcher Circana (formerly IRI), sales of sparkling wine (excluding discount) fell by 2.8 percent in volume and 0.2 percent in value in the first half of 2023. In view of the five percent drop in wine sales (source: Nielsen via Deutsches Weininstitut), with market observers even talking about a drop of around 10 percent, Germans' desire for sparkling wine in a glass seems to be stronger than their desire for still wine.

"The sparkling wine market, and therefore also consumption, is relatively stable despite multiple crises," said **Frank Schmidt**, one of the managing directors of Peter Herres Wein- und Sektellerei GmbH, Trier.

According to Circana, all sparkling wine categories except for Spanish Cava, are performing negatively in terms of volume. Cava made a surprising leap: The segment dominated by the Freixenet brand grew by 9.3 percent by volume and 7.8 percent by value.

"Our Freixenet Carta Nevada has a significant share of this with a market share of almost 90 percent," said **Philipp Gattermayer**, Member of the Management Board at Henkell Freixenet.

At the same time, Freixenet Carta Nevada, by far the world's most successful Cava, is not in the low-price segment with a list price of 6.49 euros. The average price in the Cava category is 4.42 euros. As this price is a good two euros below the market leader's RRP, it can be assumed that a not insignificant proportion of the bottles changed hands as promotional goods. In total, Cava accounts for a good ten percent of the entire sparkling wine segment in German food retail, with just under 17 million bottles in the first half of 2023. The average price of 3.81 euros in the sparkling wine segment also indicates that customers are securing favourable prices in food retail through promotions. At Rotkäppchen-Mumm, for example, the proportion of



Christof Queisser



Rudolf Knickenberg



Christof Queisser



Stephan Pellegrini



Frank Schmidt



Philipp Gattermayer



Christian Josephi

promotions rose by 6.3 percentage points to 69.5 percent in the first half of the year, according to the company. It can be observed that, despite the increase in RRP prices, the promotions are often based on previous price levels. Overall, the sparkling wine segment at Circana achieved an increase in turnover of 0.6 percent in the food retail sector, but a decrease in volume of 3.2 percent. With 138 million bottles in the first half of the year, the segment accounts for 81.5 percent of the entire sparkling wine segment in Germany. Another phenomenon in the food retail sector are the losses in the Prosecco category. At 7.90 euros, a bottle of spumante currently costs more than twice as much as the market heavyweight sparkling wine. Consumers acknowledge this with a drop of 8.6 percent in terms of volume and minus 1.6 percent in terms of value. However, compared to other segments with average prices of over seven euros, such as Crémant, the Italians are still getting off lightly.

"I don't expect a shift back from Spumante to Frizzante, as Prosecco Frizzante DOC has also become too expensive compared to other origins without a geographical designation of origin," said Stephan Pellegrini. "In my opinion, the Consorzio would do well to direct its producers towards the spumante variant."

"We are active in the food retail sector. However, we are seeing a positive trend in spumante," added Rudolf Knickenberg from Schlumberger.

However, Prosecco figures are also declining slightly in e-commerce. At Hawesko GmbH, Hamburg, which belongs to the Hawesko Group and is the online subsidiary of Germany's largest wine trading group, demand for Prosecco Frizzante in particular has recently declined. In the Prosecco segment in general, there are signs of an improvement in the purchasing situation.

"The Prosecco brand is so well established in Germany that we believe it will continue to play a major role on the German market," said a spokeswoman for the group.

The figures for its little champagne brother, Crémant, look critical in the food retail sector. According to Circana, the segment is down 12.2 percent by volume in the first half of 2023 and 5.7 percent by sales. The price per 0.75-litre bottle rose by 7.5 percent to 7.16. By contrast, the market for champagne, which has become a self-seller in Germany during the coronavirus pandemic, is moving sideways. Food retailers play a rather subordinate role in the high-price segment. Specialist retailers, online retailers and the catering trade make the music here. "Branded champagnes and rare qualities such as prestige cuvées, single-vineyard and vintage champagnes are in very high demand - despite price increases," said **Christian Josephi**, Comité Champagne representative for Germany and Austria.

"The super-premium customer is stable, but has to get used to the new prices for the top champagnes," said Mr. Schlumberger, Managing Director Rudolf Knickenberg, who has the Louis Roederer brand in his portfolio.

No- and Low-Alcohol Even in Sparkling Wines

Meanwhile, the non-alcoholic sparkling wine segment is developing into a mega-trend. According to Circana figures, the category is outperforming all individual segments in the sparkling wine sector in food retail. Non-alcoholic sparkling wines recorded a 12.3 percent increase in volume in the first half of the year. Sales rose by 13.8 percent. The average price remains relatively stable at 3.09 euros - in the previous year it was 3.05 euros. The category has now reached a size that is not to be sneezed at. With 14 million 0.75-litre bottles sold in food retailers, it is approaching Cava sales (just under 17 million bottles). In terms of turnover, non-alcoholic beverages have already overtaken Prosecco Spumante (41.5 million euros) with 43 million euros.

"Our association surveys show growth in sales figures for so-called non-alcoholic sparkling wine, which represents a complementary business to classic sparkling wine," said **Alexander Tacer**, Managing Director of Verband Deutscher Sektellereien e.V.

The association assumes that these sparkling alternatives will continue to establish themselves in the German and international sparkling wine market in the future. Many market participants are not yet prepared to venture an outlook for the year as a whole - the mood at the end of the year is too important.

"Looking ahead to 31 December 2023 is not easy," Mr. Pellegrini said. "But the end of the year is traditionally a strong time for sparkling wines and we hope that consumer sentiment will not deteriorate any further. However, politicians contribute more to this than sparkling wine producers."



 Spain


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SPANISH SPARKLING

Facing Obstacles in 2023

Inflation and slumping consumption are not sparing Iberian sparkling wines, which are paying the price for the difficulties of the global economy, especially shipments to foreign markets. Domestic consumption is holding up, with turnover growing by 5.5%. The world of Cava is looking for new ways to valorise its production. It is now counting on limited zoning of four sub-zones, which Valencian producers are contesting

With the end of the year around the corner, the time for taking stock is approaching for the wine world. In 2023, the industry faced the worst global economic situation in years, resulting in a generalised drop in consumption that did not spare Spain.

The latest figures from the Organización Interprofesional del Vino de España (Oive) confirm a -6.5% drop in wine consumption in the Iberian country between August 2022 and July 2023, reaching 9.64 million hectolitres. Expenditure grew by 5.5% (+3.3% net of inflation) to 2.6 billion euros, for an average price reaching 4.19 euros per litre.

Spanish wine producers have high expectations for the month of December, especially with Espumosos (mainly Cava), the best-performing category in recent years. According to the Oive's latest data, the rise in bubbly consumption marked a growth in value of 5.5%, in line with the general figure. With a slight -1.4% fall they still fetched the highest average price of the industry by far at 7.30 euros per litre, for a market share of 10.3% (equal to 268.4 million euros). The domestic market has experienced a constant decline in inflationary pressures since the summer, suggesting an improvement on the consumption side. Yet it's a gloomier picture for foreign markets. Figures from the Oive show Spanish wine shipments fell rather sharply, both in value (-3.4%, to 2.13 billion euros) and volume (-3.2%, to 1.52 billion litres) in the first nine months of 2023. The trend affects all wine categories, including bubbles, which experienced declining exports down -3.3% in value and -5.5% in volume.

2022 production and the Challenges of Tomorrow

While the partial data of the Oive regarding local and international consumption paints a challenging picture for Spanish wine in general, the Cava category ended 2022 with the best numbers ever. Waiting for the results for 2023 (available end of March 2024), it may be useful to take a look back at 2022 to better assess the situation—249 million bottles of Cava were sold in 2022 (+4.58% over 2021), 77 million locally, up 13.5% over the previous year. Most of Cava's turnover (69%) is linked to exports. Germany, the United States, Belgium and the United Kingdom remain the main markets.

Held in Barcelona from November 26 to 28, under the direction of the Consejo Regulador de la Denominación de Origen Cava, the forum 'Cava Meeting 2023' brought together producers, opinion leaders, sommeliers and Masters of Wine from all over the world. The three-day event expressed the rich diversity of this appella-

By HANS P. MONTGOMERY

tion that counts 38,274 hectares and 350 producers (144 of base wine and 206 of Cava) and relies on a production pyramid with a particularly solid, broad base. Not settling for the results achieved so far, the focus of the event was to find ways to continue building and adding value to the Cava brand globally.

From the 249 million bottles of Cava marketed and sold last year, 216 million were Cava de Guarda with which giants such as Freixenet and Codorníu conquered the world. This wine is usually released after nine months of ageing, a relatively short refinement period for this type of traditional-method sparkling.



For some years now, the ambition of many producers has been to challenge the best traditional methods of the world, starting with Champagne. In 2022, a new type of Cava was introduced at the top of the appellation's pyramid: the Cava de Guarda Superior Paraje Calificado, which is released to market after 36 months of ageing. For the time being, only 20,000 bottles are produced annually. It's not enough to conquer the best tables of international fine dining; a hard task even for Cava de Guarda Superior Gran Reserva (aged a minimum of 30 months) with 4.2 million bottles produced.

The difference in views, ambitions and intentions, had already led to a painful split in 2017, when the historical producers of

Penedès—led by Gramona, Llopart, Nadal, Recaredo, Sabaté i Coca and Torelló—decided to go their own way, founding the Associació d'Elaboradors i Viticultors Corpinnat, which subsequently registered the Marca Colectiva "Corpinnat" at the European Union Intellectual Property Office (Euipo).

This new player produced 2.43 million bottles in 2022, 62% of which were aged between 30 and 60 months, for a turnover of 25.9 million euros. It is difficult to imagine a substantial growth in production, given it only relies on 11 producers operating 644 hectares of their own and buying grapes from an additional 430 hectares managed by independent winegrowers.

The latest from the World of Cava

The historic split from the producers of Penedès has created a gap in such a large and singular appellation. Cava production extends to most of Spain's regions, acting as a cap for the country's entire sparkling wine production. It's not the best way to showcase the diversity and production peculiarities of the different territories. The Consejo Regulador de la Denominación de Origen Cava, headed by Javier Pagés, recently introduced an initial zoning of Cava, identifying four sub-zones: Comtas de Barcelona, Valle del Ebro, Vinedos de Almendralejo and Zona de Levante. This limited division into macro-areas is unlikely to truly enhance production diversity.

The initiative was still not enough to avoid the discontent of Valencian producers, united in the Asociación de Elaboradores de Cava de Requena, who four years ago waged a battle for the recognition of the Denominación de Cava de Requena in Valencia's surrounding area. The Consejo Regulador del Cava tried to thwart the move, arguing it was impossible to use the toponym Requena because it risked generating confusion with the local denomination Utiel-Requena.

The dispute was finally settled at the end of November when the Supreme Court of Spain rejected the appeal of the Consejo Regulador del Cava, giving the producers of Cava de Requena the possibility to promote themselves on the market starting 2024 as the only producers of Cava in Valencia's surroundings.



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LOCAL CANADIAN SPARKLING WINE SALES REMAIN LOW, BUT ARE DESTINED TO INCREASE AS QUALITY AND VOLUMES GO UP

Bubbles Are a Success, with PROSECCO AS A PROTAGONIST and Champagne in Decline

By GABRIEL RIEL-SALVATORE

The overall perception of sparkling wine in Canada is changing rapidly. While Champagne sales are down, sparkling wines are experiencing unprecedented growth, with Prosecco emerging as the drink of choice. A shift in how people view drinking has pushed consumers to enjoy bubbles year-round. While younger customers are leveraging various ready-to-drink options, sparkling wines may act as a bridge into the wine category for Millennials and Gen Z consumers



Greg MacDonald



Simon Bourbeau



Renaud Lapointe-Bussière

For years, Canadians have celebrated by drinking Champagne. With the younger generation looking for fresher, lighter and cheaper bubbles to drink in more informal settings, things have been rapidly changing in the country of the maple leaf, with Prosecco emerging as the drink of choice. While sales of still wine in volume have remained stagnant in the past six years and are expected to remain so, sparkling wines have seen their share soaring 14.5% compared to one year earlier according to a 2022 Statistics Canada report. Data from Statista for the fiscal year ending March 31, 2022, corroborate this trend as volume of sparkling wine sales in Canada amounted to approximately 24.85 million litres, over 21.61 million litres the previous year.

“The sparkling wine and Champagne categories saw unprecedented growth since 2020, although growth has slowed down in recent months,” explained Greg MacDonald, Senior Category Manager, European Wines & Destination Collection at the Liquor Control Board of Ontario (LCBO).

In a 2022 press release, Wine Intelligence revealed the craze for sparkling wine in Canada had grown more than half in the past five years and was expected to increase by another 30% in the next five. Prosecco has been riding this wave and outperforming the market, rising from nearly one in five bottles of sparkling wine consumed in 2016 to around one in three in 2021, according to IWSR data.

“Prosecco sales and French sparkling wines, excluding Champagne, continue to grow,” Mr. MacDonald said. “It is possible that consumers are selecting more affordable sparkling options. Cava sales are showing modest growth, and Italian sparkling (mostly Prosecco) is currently driving category growth.”

Same story at the Société des alcools du Québec (SAQ), the second biggest state monopoly in the country, where consumers are buying less Champagne and turning to sparkling wines.

“Figures speak for themselves as Champagne is down 3% in the last year, while sparkling wines are up 8%,” asserted Simon Bourbeau, Director of the Celebrations category at the SAQ.

Further findings from Wine Intelligence have shown that the impressive rise of popularity of sparkling wines in Canada between 2019-2022 was mainly driven by Millennials. The number of consumers grew by 21% in just three years, as close to a million new drinkers have entered the sparkling wine segment as of 2019. Today, 42% of all sparkling lovers fall within the 25-39 age group, up from 37% in the same period.

“Ontario sparkling wine drinkers are skewed towards women and those in the 19-24 and 35-44 age groups,” Mr. MacDonald said.

The trend is fairly similar in Quebec according to Mr. Bourbeau. He points out, however, that “Champagne tends to be enjoyed by men and women of the 35-44 age segment in equal proportions.”

Similarly to other markets, the perception of sparkling wine in Canada is evolving from a beverage enjoyed in formal occasions to one increasingly suited to more relaxed environments. The number of settings suitable for its consumption has increased significantly, as has the frequency of its consumption among Canadians. Statistics from Wine Intelligence also show that the number of sparkling wine drinkers in Canada enjoying bubbles once a week has risen from 16% in 2019 to 25% in 2022.

“The trend in the last few years has been year-round drinking of sparkling wines, independent of special occasions, but time will tell if this trend continues,” Mr. MacDonald said.

Fairly stable in recent years, the holiday season (December) still accounts for around 20% of annual sales by volume for all types of sparkling wine and Champagne at the SAQ, Mr. Bourbeau said.



Isabelle Gaudet

Local Sparklings on the Rise, yet Failing to Meet Demand

In an interview with Wines of Niagara, Eugene Mlynczyk, a Master of Wine and luxury portfolio manager for Constellation Brands Canada, suggested there is a genuine opportunity for Canadian sparkling wines as the number of producers of sparkling wine and volume produced doubled between 2004 and 2014. He argued the growth isn't fast enough to keep up with the demand. While Canadian sparkling wines account for about 3% to 4% of all wine produced, said Mr. Mlynczyk, other countries have increased those figures to 7% to 10%. Canadian producers are also facing fierce competition with Cremant, Champagne, Prosecco, California and Cava sparkling wines. Canadian sparkling wine sales currently represent 3.5% of total sparkling sales.

According to Sommelier Business, regions like Ontario, Nova Scotia and British Columbia are producing sparkling wines of increasing quality, and this category is forecasted to register the fastest value growth for 2022-2025. Almost a third of more than 650 wineries across Canada produce them either following the Traditional or Charmat methods. As they increase in quality, there is enormous opportunity for Canadian brands to steal shares from Champagne or Prosecco segments.

“Overall, Ontario sparkling wines are doing well and continue to grow in sales,” Mr. MacDonald said.

The situation is somehow stable in the Belle Province, where sales of local sparkling wines depend on the availability of these products

from suppliers who also distribute them directly to wineries or restaurants, explained Mr. Bourbeau. Following the introduction of numerous Pet Nat products over the past two years at the SAQ, this category is growing faster than sparkling wines as a whole, while it still remains a stagnant, niche category at the LCBO. Local sparkling wines and Pet Nats are all the rage right now, confirmed Renaud Lapointe-Bussière, sommelier at Montreal, Quebec's Casavant, a French brasserie focusing on local produce and natural and organic wines.

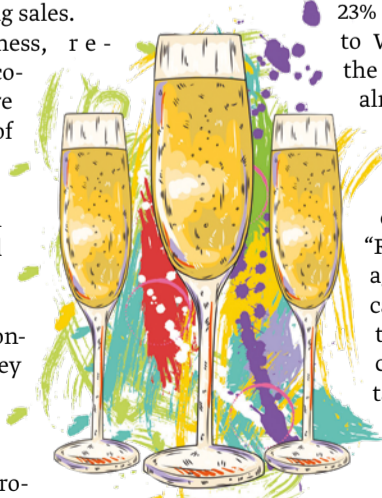
“Word has spread that the Quebec climate is favourable for sparkling wines,” he said. “In restaurants, however, people are looking for products they don't know. So Quebec wines may be less popular in general. Yet Pet Nats are still growing fast, although we're still trying to make an effort to offer quality products: more time in the bottle or better controlled bubbles. Of course Pet Nats are still trendy, yet customers are increasingly aware of their different qualities. It's no longer enough to say that it's a Pet Nat. There still has to be a 'wine' behind the bubbles.”

Ready-to-drink & Sparkling, a Bridge to the Wines Category

In the overall Canadian market of alcohol beverages, the ready-to-drink (RTD) category rose 23% between 2016-2021 according to Wine Intelligence. Confirming the national trend, this category almost tripled its volume in the past 5 years at the SAQ, experiencing a 30% growth over 2017, confided Isabelle Gaudet, SAQ's Marketing Analyst.

“RTDs and low-alcohol beverages are certainly fast-growing categories at the SAQ, but so far there's no evidence that the craze for these categories has taken market share away from sparkling wines,” Mr. Bourbeau said. RTDs have shown remarkable growth over the last few years at the LCBO as well and certainly appeal to Gen Z consumers.

“Sparkling wine may actually act as the bridge for these consumers to come into the wine category, as sparkling wines offer the refreshing tastes that RTDs do,” Mr. MacDonald said.



 Scandinavia


INFLATION IS HITTING, BUT FESTIVITIES PUSH BUBBLES

A SLOWING DOWN in Northern Europe

By ASA JOHANSSON

At the end of the first half of 2023, Vinmonopolet, the Norwegian state monopoly, saw its sales down 2.2 per cent compared to the previous year. According to the monopoly the decline was expected, as the pandemic still led to unusually high sales for parts of last year.

"However, the drop is getting smaller," said Jens Nordahl, press officer at Vinmonopolet.

Red wine is the largest category with a solid margin in Norway even though red wine has seen a marked decline for the first half of the year. There is a weak growth for the lighter and brighter wine styles: white wine, sparkling wine, and rosé wine in Norway according to the monopoly's statistics. Prosecco has had the largest market share in sparkling wine - until now. In 2022, France with Crémant surpassed Prosecco in sales volume for the first time. This happened even though Crémant has a higher price per litre (on average) than its Italian colleague. "A Crémant is also the best-selling product at the monopoly with Delorme Crémant de Bourgogne BdN Brut," said **Camilla Wedding**, assortment analyst at Vinmonopolet.

Sparkling wines are sold throughout the whole year but peaks during Christmas and New Year celebrations which are still an essential period for sparkling wines in Norway.

"Especially for Champagne, where customers demand higher quality and price," said Ms. Wedding. At the Nordic state monopolies there is a great interest towards the RDT category (Ready to drink) and no-low alcohol alternatives. Are these taking away market shares from sparkling wines in Norway?

"The alcohol-free category is established in Norway now but is a separate product category that has not taken market share from sparkling wine," Ms. Wedding said.

Sparkling Wine in Sweden

The Swedish economy is struggling with high inflation and a weak currency (SEK), which means less money in private customers' and households' wallets. This has had effects on the different categories and has been significant especially for the Champagne-category that in 2023, was down in volumes with over seven per cent. On the other hand, other sparkling wines (not Champagne) saw a six per cent increase. There is also a slight premiumization in both Champagne and other sparkling wines categories, a trend that is also seen in other wine categories. In fact, in Sweden, Champagne growth can be seen only in the 45 - 85 euro (500-999 SEK) price bracket, much due to price increases of some big brands. Dry white sparkling wines also see an increase in sales. Otherwise, the most significant market share by far for sparkling wine is in the 6-8 euro segment (80-99 SEK). For rosé sparkling wines, this span is slightly higher

6-10 euro (80-119 SEK). The sales of sparkling wines peaks in Sweden during

After the increase in sales of alcoholic beverages during the pandemic, the markets in Sweden and Denmark are slowing down. This is due to high inflation and rising interest rates that appear to be impacting the respective economies to a greater or lesser extent - so even if there is not much to celebrate, how is the sparkling category doing?



Anna Rönngren



Åsa Wahlström

Christmas holidays even though June is a more important month. This is when the Swedes go on vacation and there is Midsummer, one of the biggest holidays in the country. In June 15.4% of the total sales of sparkling wines was sold in 2022, followed by December with 12.8% of the total in the same year. Overall, the trend in Sweden is that people tend to buy less but slightly more expensive bubbles, but it seems that the sparkling category is suffering more than other wine categories.

"Sparkling wines are so closely related to celebration that when people feel there is nothing to celebrate, sparkling wine will not be on top of their minds," said **Anna Rönngren** from the Swedish importer Tryffelvinet.

Another category that is growing fast is the Spanish Cava. Regarding Prosecco it is decreasing, even though the market share is still large,

exactly as in Norway, and all kinds of Crémants are increasing in popularity.

Anna Rönngren confirmed this trend.

"I would say that moderately priced sparkling wine made using the traditional method is gaining ground right now," she said. "People may be unable to afford Champagne, but they are still looking for quality. South African Methode Cap Classique (MCC) is an excellent example of nicely priced sparkling wines with a high overall quality", she says. Even though Prosecco's reputation, according to the interviewed persons in this article, seems to decrease, it still sells more in volume than Champagne at the Swedish Monopoly. In 2022 the five most sold products (volume) in the sparkling category were three Cava and two Prosecco. According to the Wine Intelligence's report about Sweden in 2022, Champagne might be the overall wine style that regular wine drinkers are most familiar with, but Prosecco has a far higher rate of conversion to sale (30% as against 18%). Cava, at 25%, is not far behind, putting it joint second with the once-unavailable Rioja, whose influence is still powerful, but diminishing. This is part of a consistent trend, with consumption of red wines declining in favour of white and sparkling wine. Half of all Swedish wine drinkers drank a bottle of the Italian sparkler in 2021, whereas the number for reds has dropped from 90% in 2019 to 83% the same year.

"Generally, Prosecco is the wine regular consumers, not connoisseurs, drink frequently. It is easy to understand, appreciated and costs less," said **Åsa Wahlström** from the Swedish wine importer Solera.

Prosecco still attracts the mainstream market, but could it be challenged by other products in the same price category, like RDT or the No/low wines?

"I think the Ready-to-Drink versions are taking market share from sparkling wine, while the No/low category is still tiny," she said. "It will be interesting to see how product development will go in this category. Younger consumers and those who are new to wine are open to alternatives to traditional products."

Something that can be seen if you look at wines sold in cans, a category that lately has had a remarkable growth, much because it has been promoted together with other environmentally friendly packaging by the Swedish monopoly. But what about more niched sparkling wines? The wine importer Budbreak works both with established brands and more niched products and has not seen a decrease in sparkling wine sales within the company.

"The Pet Nat trend is still strong, with affordable, thirst-quenching bubbles being a popular beverage, especially during the warmer summer," said **Nicolai Breschi** from the Swedish importer Budbreak Wine. "Pet Nat has taken market shares from the still rosé wine market but not from other sparkling wines."

According to Mr. Breschi, Prosecco is becoming more and more associated with mass-produced, low-quality wine and it makes it hard to sell even a Col Fondo, if it bears the name Prosecco. "At Budbreak, we have chosen to work with an artisanal Col Fondo product," Mr. Breschi said. "However, it is still hard to get it on the lists in



fine-dining establishments because of Prosecco's not great reputation," he said. "Col Fondo is a product more suited for 'cool' bistro-type restaurants, while the large-volume Proseccos are mainly seen in big venues where good margins are more important than quality."

Sparkling Trends in Denmark

In Denmark, the only Nordic countries without state monopoly sales are also declining due to the economy's hardships. **Per Buhl**, CEO and co-owner of the wine importing agency Laudrup Vin, says Champagne is suffering more than other categories.

"This is mainly due to Fine Wine clients' investments," Mr. Buhl said. "After Covid, we experienced a massive demand for top Champagnes and Vintage Champagne in general, but now, with the crisis, many clients are dropping their stock, and prices are going down 20-25%."

In Denmark, the biggest sellers are low-priced Prosecco from Italy and Cava from Spain, often less than ten euros per bottle. In the last year, there has also been an increase in sales of Crémant from Burgundy and Alsace, probably due to the increased price of Champagne. Danish customers are price sensitive, something that shows in more niched categories too.

"The most expensive Prosecco is probably 20 euros a bottle," Mr. Buhl said. "Meanwhile, the cheapest Champagne starts at 45 euros. Of course, we see some quality Franciacorta in the middle of this market at 30-45 euros, but the volumes are still shallow."

He also added that "The Christmas period is still an important period for sparkling wines in Denmark. Mainly for B2B with Christmas gifts and especially for New Year for private consumers consumption."

Hopefully, there will be more to celebrate shortly in the Nordic countries.



Nicolai Breschi



Per Buhl




 China


Matteo Cecchetto

Nicole Mao



Francisco Henriques



Danni Wang



Niki Algettawage



NUMBERS SHOW SOME SERIOUS GROWTH

Sparkling Wines ON THE WAY UP

Chinese consumers are discovering the world of bubbles. While Champagne remains the uncontested protagonist in celebrations and parties, cheaper sparkling wines like Prosecco and Cava, but also the “sweet” wine Asti and Cap Classique, are taking steps forward in everyday consumption

By IAN D'AGATA

According to **Matteo Cecchetto**, Senior Brand manager at Summergate, an important wine distributor and importer, exciting times loom ahead for sparkling wine sales in mainland China.

“While the projected growth of red and white wine sales hover around 2%, those for sparkling wine are more than double,” Mr. Cecchetto said. “Specifically, estimates are that Champagne will grow between 2022-2026 by a whopping 11%; and though it continues to outperform all other sparkling wines in terms of both volume and value, sales of all the other sparkling wines are still expected to grow by 4.8%, also an impressive figure. Despite the modest per-capita consumption of sparkling wine, the expanding consumer base and diverse occasions suggest potential growth in the future.”

Carmen Lim, a past head Sommelier in important Michelin starred restaurants in Asia and now the director at Wine App in Shanghai (a very successful wine shop and bistro concept that is looking to expand to other cities in China) confirms that sparkling wine sales are on the rise in China.

“I am not the only one in the wine business who thinks that sparkling wines are slowly gaining importance in China and there is more and more appreciation for this category of wines,” she said.

Nicole Mao, Partner and Sales marketing director North Asia of Nimbility, believes that for the time being at least, Chinese people who like wine are still mostly ‘occasional’ drinkers, meaning they tend to consume wine mostly during certain occasions. At the same time, she believes that the Chinese wine market is shifting over to younger consumers who are more likely to drink during social gatherings, much as it is elsewhere in the world.

“In other words, while it was never automatic to ask for wine or sparkling wine when going out for an afternoon moment of relaxation, the younger generations in China are starting to ask for a glass or even a bottle of sparkling wine,” said Ms. Mao. “And this never used to be the case even ten years ago.”

Campell Thompson, CEO of The Wine Republic (fine wine importer), agreed.

“A small subset of wine drinkers drink Champagne regularly, but a larger group drink Champagne rarely, and that do so for celebrations/ceremonies,” he said.

Francisco Henriques, General manager of Cws, one of the biggest and most important fine wine importers in China, is more positive, and provides easy to understand examples based on his long experience in the trade.

“Absolutely, sparkling wine sales are on the way up in China,” he said. “About 10 years ago most importers were carrying one Champagne brand only, plus one entry-level sparkling wine. Today, the market is totally different: for example, my company now carries 25 different sparkling wine producers from all over the world. That never used to be the case! We now find that an increasing number of Chinese wine lovers are starting to consume these wines all day long and on many different occasions, not just in night clubs as it once used to be. So, while it is true that the majority of those getting comfortable with wine in China still drink only at some

moments of the day or year, things are starting to change here too, and people now enjoy wines at all times of day. Sparkling wines, that are light-bodied and fresh, are especially ideal for daytime drinking.”

Danni Wang, Head Sommelier at Ensue in Shenzhen, one of China’s most famous and most-awarded restaurants, stated that it’s very apparent that more high-end restaurants in big Chinese cities are increasing the number of sparkling wines in that section of their wine lists.

“Clearly, they wouldn’t be doing so unless they thought the wines would sell,” Mr. Wang said. And so, there are now ever-increasing opportunities for people to try wines they normally wouldn’t and in so doing, they are getting more comfortable with sparkling wines that they often find match very well to specific foods.”

Which Sparkling Wines are Selling Best in China?

Giovanni Angoscini, CEO of Zefiro Wine (a fine wine importer) believes it is a matter of “Value for money is still very important in China’s wine market. In this light, Prosecco is hard to beat; plus, the Chinese seem to like it, and not necessarily only the Extra Dry category, the Brut Prosecco wines do well too.”

Nicole Mao also agreed that at mass market consumer level, price is still a very important deciding factor.

“Price is still very important, but as Chinese begin to understand and know more about wine, it is no longer the only driver of wine-buying decisions,” Ms. Mao said. “While off-dry categories are well-accepted here, with wines like Prosecco and Moscato it isn’t just that they are slightly sweeter, but that they also have lower alcohol and friendly pricing. And that price isn’t such a huge deterrent after all can be seen by the fact that, for those consumers that are more engaged, Champagne is still the go-to brand.”

Mr. Wang agreed that while Champagne remains by far the market leader in sparkling wine sales, Chinese wine lovers are finding specific dining occasions ideal for Prosecco and Cava. For example, Mediterranean restaurants, but interestingly, Cava is now being increasingly ordered at afternoon tea, an afternoon pastime that in China is still going strong.

Niki Algettawage, Head Sommelier of Scilla, one of Shanghai’s currently hottest restaurants, believes that sparkling wines are on the rise and Italian ones in particular because they are considered to be “pocket-friendly” wines, meaning that they are sold at friendlier prices.

“So, while Champagne still leads the way, and none of us could survive without its sales, Franciacorta, Trento and Moscato d’Asti are all selling better and better,” he said. “Importantly, the average Chinese wine consumer will leave Champagne for special occasions and turn to Moscato d’Asti, (especially) for everyday drinking with friends and family”. According to Thompson, “Food-wise, I think it is inevitable that Chinese wine and food lovers will follow the world trend towards drier sparkling, though regional cuisines are so different in this country that it is foolish to think that one sparkling wine category or style will suit everyone. That’s just not possible. This is why I think sparkling Rosé wines will become

more important in China, because they pair extremely well in an even more harmonious manner with the cuisines of this country.”

Best Selling Now

Mr. Cecchetto said that “While sparkling wine encountered challenges during the 2022 lockdowns, super premium and rare champagnes have remained resilient, buoyed by their status in China and a wealthier, knowledgeable consumer base. Conversely, more affordable sparkling options like Prosecco Doc that do not always deliver quality and count on the wine’s name selling have faced a downturn, as budget-conscious but also increasingly knowledgeable consumers explore alternative products.”

Mr. Algettawage of Scilla said that “At our restaurant, which focuses on Mediterranean-style food, the three best-selling sparkling wines are a Champagne, a Spanish “Vintage” wine and a Franciacorta. The last wine is actually a very high-end bubbly, so that tells me Italian wine sells well with those who are already informed, but that means that with time many more people will follow suit. At the same time, we are witnessing progressively increasing sales of Spanish bubbly, not just Cava but Corpinnat too, so that also confirms the fact there is a market for sparkling wines in China.”

Mr. Henriques said that “Consumers appreciate French classics especially for celebrations. But if French wines lead the way in terms of value, it’s the Italians who are number one by volume sales. And not just Moscato d’Asti, but Prosecco too. That there is increased interest in quality sparkling wines in China is well-shown by the fact that sales of Franciacorta, which are generally not inexpensive bubbly, are also doing better and better. A third group of bubbly is made up of South Africa’s famous Cap Classique, Spain’s Corpinnat and Cava, and even unique PetNats”.

For Ms. Lim, sales are a mix of cheap and friendly and complex and serious.

“But slightly more expensive wines can do very well, even when there are cheaper versions of the same wine category available,” she said. The classics that are characterized by a sterling reputation, very good quality and reasonable prices never falter.”

For Mr. Angoscini, it is “Prosecco that is dominating their white wine sales; traditional method wines are following but at a distance. Of the various Prosecco styles made and available in China, it is the traditional Prosecco re-fermented in the tank, which gives more approachable wines, that does best; these are followed by ancestral or pet-nat versions, that are more complex and appeal more to sophisticated drinkers.”

According to Nicole Mao, the fact that her company’s English sparkling wine, a little-known category of sparklers, is doing very well is a sign of the category’s penetration of the market. “Even though British sparkling wines are not cheap, ours has been performing very well in terms of market entry and consumer acceptance,” she said. “Yet it’s a wine nobody knows much about here. So, this tells me that Chinese consumers recognize quality once they are exposed to it in the wines. In this case, success can be had easily, it’s just a matter of targeting these potential bubbly buyers well.”



South Korea



VOLUMES DROP, BUT VALUE GROWS

Champagne Has No Rivals Only Eastern European BUBBLES ARE RISING

By MI YEUN HONG

The situation is less rosy than in the past, but still good for sparkling wines in Southern Korea. According to the Customs Agency, data for 2023 seem less performing than those from 2022 in terms of volumes (as the chart shows), but very positive in terms of value. As per the Korean unit, imports were 5226.9 tonnes of sparkling wines until September, and therefore it seems difficult to reach the 8452.7 tonnes from 2022. In terms of value, the 76.8 million Dollars made in the first nine months of the year show an average price increase of almost 30 percent. To sum up, maybe the market is slowing down a little, but those who drink bubbles in South Korea opt for choices of high quality and prestige, despite the price hikes due to the inflation in the Western markets.

"Overall, the Korean wine market decreased by 20% this year," said **Ki-Jung Kim**, a consumer reporter at Maeil Business Newspaper, Korea's largest economic daily newspaper. "Among them, Chilean wine has faced the hardest hit. That means that wine is increasingly

entering the premium market." Mr. Kim is an expert in the field, covering wine, food, retail, distribution and luxury lifestyle.

"I usually go to a lot of wine classes and forums," he said. "And I note that the Champagne classes are always totally full. However, for the other Sparklings like Prosecco or Cava, the situation is difficult, but Prosecco is effectively doing big marketing events in Korea. At first, Korean consumers tended to perceive all sparkling as champagne, but now things are different."

For those who want to enter the Korean market, he suggested that "For Italian sparkling products such as Prosecco, in order to gain recognition in Korea, a representative player is needed. The image of brands such as Armand de Brignac, Dom Perignon and Moet Chandon in Champagne, the five major chateaux in Bordeaux, and DRC in Burgundy are helpful for overall wine consumption of their proper

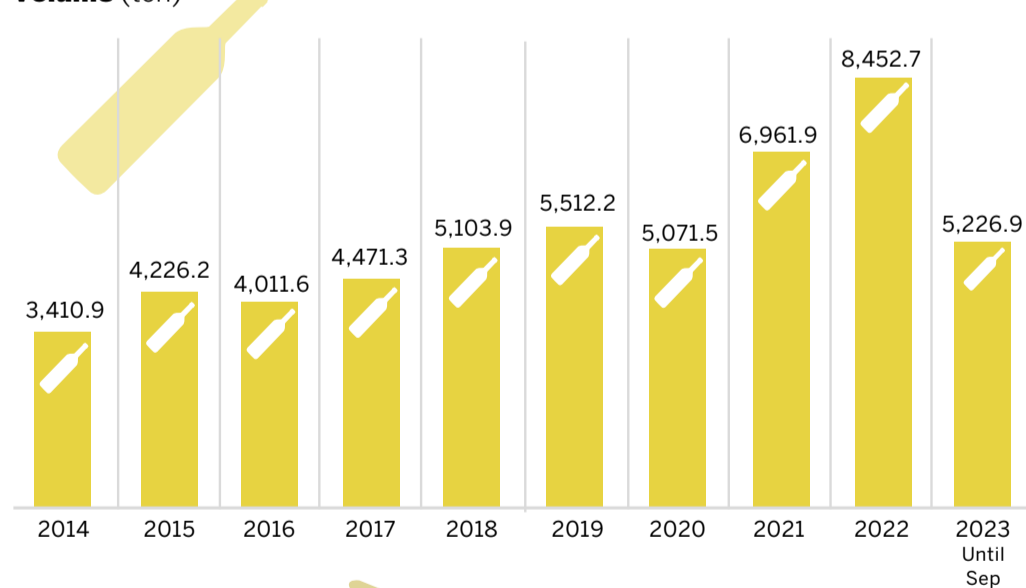
category to make an example. In the past, cheap wines were considered cost-effective and were welcomed in the market. But now if you make a mistake, I think the entire category can fall and be considered as cheap wine." "Currently, it is a crisis due to



The South Korean market confirms success for French bubbles, even if some deem it at the apex. Prosecco has little room for now, while sparkling wines from Eastern Europe and other neighboring countries are starting to emerge. What matters there is a strong brand

IMPORTATION OF SPARKLING WINES 2014~2023

Volume (ton)



Amount (1000 USD)



Source: South-Korean Customs Agency

the overall economic downturn, but sparkling will continue to grow in the Korean market," said **Seong Woon Yoo**, General Director of Lak Hee Ok, that has three branches in Seoul, and which is considered one of the representative Korean restaurants that seeks to combine wine and Korean food. Mr. Yoo is also the General Manager of the Korean Spirits Association and is a liquor expert invited as a judge at several international competitions. "The luxury champagne market will continue to grow," he said. "However, currently, restaurants can feel that less well-known Champagne or Cremant, and Cava are taking a hit, because sparkling wines have a strong nature as aperitif or party wine, the market is expected to grow in the long term. However, it has slowed down because the overall economy is not good right now. The Korean sparkling wine market is clearly divided into the high-priced market and the mid and low-priced market, but it feels like even high-level Champagne is shaking in these days of economic crisis. Recently we received an offer for a year-end event from a well-known Champagne maison. What this means is that they also expect that things won't go out like last year at the end of the year. The offer came in at 25% less than the market price. Seeing how they normally do business; it changes a lot and I think they also felt a sense of crisis regarding the situation in Korea."

"Diversification and growth of the sparkling wine market are expected due to the diverse needs of consumers," said **Tae Ho Choi**, President of Avec wine, a Pusan based wine specialized importing company. Mr. Choi is also vice president

of the Korea International Sommelier Association, newspaper wine columnist, and Professor at Catholic University of Pusan at the Wine master Sommelier Course, sees the outlook brightly.

"Actually, Champagne in Korea has been experiencing significant growth from 2021 onwards," he said. "Despite a price increase of more than 25%, consumption is increasing, mainly for prestige cuvées such as Dom Perignon and Krug. On the other hand, many sparkling wines, such as Sekt or Prosecco, are being imported, but compared to the popularity of Champagne, it still takes time to establish themselves. In addition, inexpensive sparkling wines centered on the Moscato variety are still maintaining their steadfast position, especially among young consumers and first-time consumers." He also explained the new trend.

"Recently, the consumption of cost-effective sparkling wines from Eastern Europe is increasing taking place between the gap in the polarized market of Champagne and Moscato, and consumption of sparkling wines from new continents such as Australia and the United States is also gradually increasing," he said. "Currently, the growth of the sparkling wine market centered on high-end champagne is saturated and is calming down to some extent. In addition, Korean wine consumers' sparkling wine consumption is due to the characteristics of sparkling wine, which matches well with various Korean foods and is sought after as wine experience increases. 'Avec Wine' anticipates this trend and currently imports sparkling wines from Europe, including 4 types of



Ki-Jung Kim



Seong Woon Yoo



Tae Ho Choi

German Sekt, 2 types of Spanish Cava, and 7 types of Prosecco. And the portfolio is completed with 5 types of sparkling wine from Moldova, a wine powerhouse in Eastern Europe, Petnat from Slovenia, and sparkling wine from Australia."

 Japan

JAPAN IS FEELING THE PINCH, ALSO BECAUSE OF THE YEN DEVALUATION



Japanese bubble aficionados are facing price hikes with caution and attention. The cost of some sparkling wines has gone up even 50% on the shelves, forcing operators to look for valid alternatives like South Africa for the lower segment, and Franciacorta to sub for Champagne

By MARI YASUDA

A STABLE MARKET Amidst Changing Consumption

Japan's import volume of sparkling wines hit a record high last year. This year, all the interviewees said that the sales of sparkling wines are almost the same as those of last year. However, due to the successive price increases since 2022, there seems to be a change in the wines that are selling well.

Consumers' Reaction

In addition to rising prices, Japan has been affected by a weaker yen. In December 2021, it was 131 yen/€, but now it is 163 yen/€. A wine selling at €12 level in retail has risen to €18 level regardless of whether it's a still or sparkling wine (please note that all prices in this article will be converted based on the rate of 163 yen/€). While prices are rising, the disposable income is sluggish. Here are various reactions from consumers.

According to **Hideyuki Numata**, shop manager of Wine Market Party, "Customers who used to drink high-priced wines are now turning their attention to lower-priced ones, which they had not previously tried. For example, a customer tried a €12 Prosecco and continues to drink it because he likes its taste."

Wine Market Party is located in Ebisu, a laid-back place close to Shibuya. Originally opened in 1994 and renewed in 2022, it boasts one of the widest selections of wines in Japan with over 2,000 items from around the world, mainly from France, Italy, and the United States.

"It seems that the budget of a bottle enjoyed at home is around €24.5 at the maximum," said Mr. Numata. "Within this range, more people tend to select Crémant d'Alsace, Crémant de Bourgogne, Cava at €12 level or Docg Prosecco."

On the other hand, **Keiichi Suzuki**, second-generation Ceo of Tsuchiura Suzukiya observed that, "there are customers who continue to purchase items that earlier cost €12 but rose to €18."

Tsuchiura Suzukiya, located in Tsuchiura city in Ibaraki, about 60 km away from Tokyo, is a liquor shop with more than 50 years of history. Their lineup of wines is centered on Europe, and they have had 35 years of experience importing wines by themselves.

Mr. Suzuki assumed that "one reason may be that nowadays everyone thinks that the price increase cannot be avoided. Another reason may be that when customers taste other wines at €12, which were probably formerly sold at €6 to €9, they find a clear difference in taste. When they find this quality difference, it seems that many customers who like wines tend to select the wines which they formerly drank even though their price increased from €12 to €18."

A Variety of Sourcing

Ai Miyashita, General Manager of The Winery of Japan said that, "In order to prevent customers from running out of wines to buy due to price increases, we are maintaining the price range of our product lineup and continue to look for items with the same quality."

A wine shop in New York, The Winery, opened The Winery Tokyo in 2015 in Azabu Juban, a quiet residential area and a home to many embassies. Ms. Miyashita selects wines based on the slogan of The Winery in New York.

"We only sell wines for which we want to pay money by ourselves to drink," she said. "Due to the price increase, there had been no wines which could sell at €6 level at our shop. However, we found one sparkling wine from Bairrada, Portugal, which we can sell at €6. The quality is worth the price, and many people buy it again. At €12, we found a sparkling wine of Friuli, Italy, from Glera grapes but without the Prosecco designation. We have a hard time finding alternative wines, but if the taste is good, our customers will be satisfied."

Sparkling wines from South Africa have been drawing attention. "South Africa's sparkling wines from Méthode Cap Classique are gaining popularity," Mr. Numata pointed out. "Wines of South Africa are often viewed as wines of the New World with a character of the Old World. Even famous sommeliers in Japan mistake them for French wines of France. South Africa's sparkling wines

have the most similar taste to that of Champagne, and the price is just right, ranging from €12 to €24."

Ms. Miyashita also mentioned the wines of South Africa.

"Customers do not select South Africa's wine by themselves," she said. "However, when we recommend one South African rosé sparkling wine from Méthode Cap Classique, many customers repeatedly buy it. It costs €22 and has a good cost-performance ratio."

On the other hand, **Tomohiro Kawaguchi**, Corporate Officer & Director, Marketing Division of Mottox, who imports over 130 sparkling wines from around the world, has been seeing a decrease in sales of Chilean sparkling wines. Mottox imports Chilean sparkling wines which are sold at €6 level to €12 level. By the EPA (Eco-

nomic Partnership Agreement) between Chile and Japan in 2009, the duty on wines was decided to be eliminated step by step over 12 years. This led to the increase in the sales of Chilean wines.

However, as Mr. Kawaguchi explained, "By the EPA between the EU and Japan in 2019, the duty was completely eliminated immediately; as a result, the price advantage of Chilean wines has diminished. Coupled with the price increase, the sales volume has decreased."

Impact of Soaring Champagne Prices

Mr. Kawaguchi of Mottox noted a recent increase in sales of Franciacorta.

"One reason is that when Champagne became difficult to obtain during Covid-19, Franciacorta was often selected instead," he said. "Another factor may be that people are turning their attention to Franciacorta due to the rise in the price of Champagne."

In fact, Ms. Miyashita of The Winery explains why she is looking for Franciacorta.

"A retail price of €31 is a standard level for a gift," she said. "However, there are currently no Champagnes that can be sold at €31 level due to the price increase. We are looking for a Franciacorta of €31 level at retail as a gift instead of Champagne. Regrettably, the price of Franciacorta itself is going up. Also, I can't find one whose quality I can be satisfied with. As a result, in our shop, we cannot complete a lineup at €31 level."

Wine Market Party sells self-imported Champagnes at €31 level. "From €31, Champagne is strong," Mr. Numata said. "Whereas Franciacorta or California are not. It's hard to overturn the view that Champagne is the only proper gift."

The Future of Sparkling Wines in Japan

With the high cost of living and the continuing yen depreciation, will the growth of Japan's sparkling wine market likely stop?

Ms. Miyashita of The Winery replied "I think not."

"If the wine culture is saturated, there may be a risk of a decrease," she said. "However, currently the wine culture is not widespread in Japan. For example, sake is well penetrated into the Japanese culture, so people who accept anything as long as it is alcohol drink sake, and those people may shift to other beverages because of the price increase of sake. However, there is no such group among wine drinkers. They drink wine no matter what happens, because they love wine. In that sense, wines mean something special to Japanese people, and that's what makes it different from other countries."

On the other hand, Mr. Kawaguchi of Mottox showed concern about the soaring prices of Champagne.

"Champagne has been performing well during Covid-19, but prices are rising," he said. "So I think there may be a risk that the sales of Champagne will begin to slow down."

Mr. Suzuki of Tsuchiura Suzukiya is also worried about the future of the Champagne market.

"Many brands of Champagne have doubled or tripled in price over the past few years, but they seem to be selling well," he said. "However, I feel that it will be difficult to continue selling at this price. I think the demand for restaurants continues to be high, but the price is no longer affordable for individual consumption."

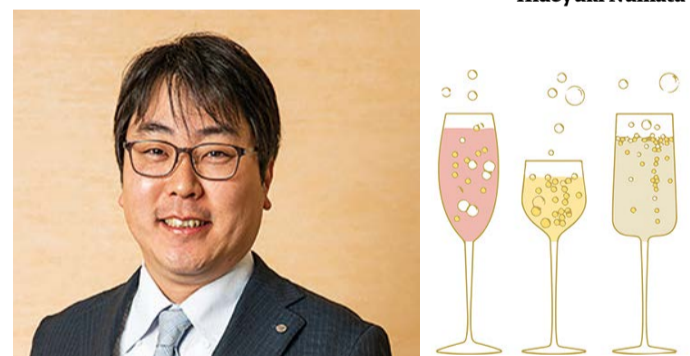
At last, Mr. Numata of Wine Market Party emphasized that producers should indicate the date of disgorgement, vintage of the base wine, ratio of reserve wines and amount of dosage on the label.

"The flavour of sparkling wines will deepen due to the Maillard reaction," he said. "This is a strong appeal which still wines do not have. If we can know how long it's been since disgorgement, it's easier to recommend a wine to customers, saying that it's delicious now considering the date of disgorgement."

Thanks to the efforts of importers and retailers, the Japanese sparkling wine market now offers sparkling wines from a variety of countries and at various price points. Thanks to its variety, the market is likely to continue to move steadily, excluding Champagne with its soaring prices.



Hideyuki Numata



Keiichi Suzuki



Ai Miyashita



Tomohiro Kawaguchi

**CLEAR
SIGNS
FROM
THE
MARKET**



The Inevitable **GROWTH** OF **WHITE** Wines

China is no longer a red wine drinking country only. The reasons for the past preference for reds were numerous, but there have been clear-cut signs that the times are changing, as we have already analysed at length in a previous issue of the Wine World Magazine (WWM 1-2023). The increasing popularity of white wines in China is not only logical, but inevitable. A short list of such factors includes the freshness of white wines and their generally greater suitability to the majority of Chinese cuisines and lifestyles; for the same reason, aromatic white grapes and their wines play an important role; the lower price per bottle of white wines relative to reds; and last but not least, white wine's lower alcohol and lower tannic contents, two things Chinese wine consumers appreciate greatly.

According to **Giovanni Angoscini**, Ceo of Zefiro Wines, active in China since 2011, "Chinese consumers are following global trends, and moving to fresher and more approachable wines. Based on my company's internal data, one bottle sold out of four is now either white or of white sparkling wine. This trend dates from the second half of 2022, so this is not a recent event (data from 2020 and 2021 is skewed because of the Covid pandemic - ndr)".

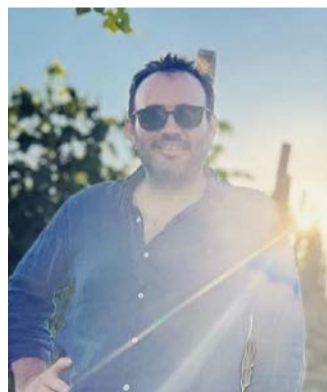
Elliot Shay, owner of the extremely successful Crush bistro in Shanghai and of the Vine Vault Imports, makes a very interesting point when he says that "The importance of red wines in the Chinese market place had to do with who was importing and buying the wines. In the beginning, across the entire Chinese market, and to a degree still today in central and southern China, there was a lack of understanding of what white wine was about. And people thought Chinese would drink red wines because of the wine's colour; red in China is associated with power and wealth. Add that wine knowledge and understanding was poor, and people were really buying wine status symbols, hence the most expensive and prestigious wine possible. In other words, they weren't buying red wines because they actually liked them or understood them. But such a situation was untenable in the long run: and that red wine sales are now falling should surprise nobody."

But Mr. Shay added white wine-specific reasons that help propel sales: "In the first-tier cities especially, women have been a driving force in the increasing importance of white wines. And they choose more food-friendly, easier to drink and lower in alcohol wines. White wines are great to drink in the warmer months: people tend to forget just how hot China can be. Parts of the country have a tropical climate, so why would anybody think that the average Chinese person will be drinking 15% alcohol red? Outside of specific tastings and dinners, it just isn't going to happen on an everyday basis."

Thomas Mathieu Levesque, founder of POK Terroir Wines went further. "I believe white wine consumption is growing fast in China," he said. "This even during the winter season, so it is not a phenomenon related only to climate. This wine trend is currently marked in Shanghai, China's most cosmopolitan and forward-thinking city, but I expect to see the same trend soon in other large cities too." Price is a factor, too. After all, white wines generally cost less than reds, Mr. Levesque added.

More freshness and less alcohol, in some cases with the addition of fragrance, are creating the ideal conditions for the expansion of white wines in China. But more than anything, the initial idea that Chinese had about wine – a status symbol, only red and very expensive – is being overcome. Today consumers here are approaching wine in a different way, also thanks to the women's choices

By IAN D'AGATA



Giovanni Angoscini



Elliot Shay



Thomas Mathieu Levesque



Campbell Thompson



Yumi Liu

Campbell Thompson, Ceo of fine wine importer The Wine Republic, is of the same mindset and is very excited by what he sees happening with dry, still white wines.

"There seems to be a growing level of interest in white wines," he said. "Some of my friends and customers tell me that they drink as much or more white Burgundy as they do red Burgundy, something that would have been unthinkable only ten years ago. Whites overall account for close to 70% of our sales by volume, but part of that is because of the 'ban' on Australian wine, and most Australian wine we sold was red."

Which White Wines are Selling Best in China? According to Mr. Shay "Riesling seems to be doing quite well but the white wines that register the highest sales figures currently are Chardonnay and Sauvignon Blanc. Riesling is the one

that goes best with Chinese food, but some local wine lovers who aren't yet knowledgeable like the sweetness of heavily oaked Chardonnays."

In fact, accepting that "Chardonnay and Sauvignon Blanc sell best" at face value is misleading, according to **Yumi Liu**, wine writer.

"Fact is, there are simply many more wines made with those two grapes available for sale, and so of course their sales numbers will be higher than those of say Sylvaner and or Torrontes, of which there are wines on sale from only a few producers in China," he said. "In other words, bigger sales do not equate with a presumed Chinese preference for Chardonnay and Sauvignon Blanc wines: that inference is just as misleading as what was believed decades ago about red wines. Sauvignon Blanc sells just because there is an abundance of New Zealand wine present in China, and the New Zealand wine association

has done a commendable job of making their wines visible and available everywhere. But interest in Sauvignon Blanc is limited in China: just think that very few Chinese wineries have bothered to plant the variety or make wine from it. Furthermore, Chinese importers will tell you that wines from the likes of Sancerre and Pouilly-Fumé, even when made by the region's most famous estates (Didier Dagueneau excepted) really don't sell well at all. That may also be a matter of price. Same with Chardonnay: at any tasting of South African wines, it is the Chenin everybody's talking about and drinking."

Mr. Levesque confirmed as much, in both senses. "Clearly, on the one hand it is correct to say that Chardonnay is leading the market by far," he said. "But on the other hand, that's mostly because most of the world's most famous white wines, namely Burgundy, are made with it. Similarly, on the one hand Sauvignon Blanc, from both France and New Zealand are still in high demand on the b2b channel; but here too it is partly because they are so easily available, which clearly increases their sales figures. In fact, anywhere German Riesling is available, it has very good market penetration, especially those styles with a little residual sugar (more or less). Also, it is very interesting to know that, perhaps also as a backlash to the perpetual increase of Burgundy's prices, that interest and sales in French Chenin Blanc is growing rapidly. Chenin Blanc is becoming more famous thanks to some excellent South African examples and the hard work that Wines of South Africa is doing, but Chenin's versatility is also not to be underestimated. That versatility, whereby you can drink marvellous Chenin Blanc wines from all over the world that are either bone-dry, off-dry or downright sweet has greatly helped Loire Valley Chenin Blanc to pick up market shares."

Campbell Thompson is more bullish on the world's best-known white grapes.

"New Zealand Sauvignon Blanc is now a well-established category, and it couldn't be otherwise given the quality of the wines, their sheer export numbers and the work that has been put into broadcasting and promoting them by Wines of New Zealand," he said. "However, at my company, which is a small part of a big industry, we've also seen strong growth in sales of our Austrian whites, with Grüner Veltliner (and Riesling) both securing many more 'by glass' listings in restaurants, and far more acceptance in the bistros and wine bars. To give you some figures, Sauvignon Blanc (predominantly from New Zealand, but also from Austria and China) accounts for 40% of our sales by volume, but keep in mind that is a focus of my wine company. Chardonnay accounts for about 8% of our sales by volume, and Riesling 7%, so there's really not much difference between the two."

Mr. Shay added further food for thought when he said that "Recently, the fastest seller we had in our restaurant was, believe it or not, a Portuguese wine made with Verdelho. Yes, I was surprised. It was the first vintage that they made it in, and it is unfortunately now sold out, but everyone who tried it absolutely loved it. Interestingly, it was a little bit reductive so I didn't know if it would be for everyone, but apparently it was. I guess that tells us that when it comes to the Chinese palate and its learning curve, we shouldn't make any assumptions as to what people will like. Simply put, what works in California, Melbourne, Oslo or Paris isn't necessarily going to work here."

Looking to the Future and Potential Growth Mr. Levesque said that, "Off-dry wines (Riesling and Chenin Blanc) will always be easiest to pair with spicy food and seafood, which are Chinese staples."

Mr. Angoscini of Zefiro took a broad view. "In general, I think there are occasions for wine consumption that are not yet as common here as they are in other countries," he said. "For example, wine can be enjoyed by itself, it does not always need to be paired with food or to be drunk at the dining table. But for many Chinese, it is still not a regular or even normal thing to sit down and have a glass of wine by itself. But young people have no trouble doing just that with beer and cocktails, so why not wine? I dream of the day when young people will be drinking Prosecco in the middle of Changde Lu in Shanghai just like they do in Rome or NYC."

Pictures from the 2023 National Symposium of Australian Women in Wine



Australian Women in Wine Demand Action on GENDER EQUALITY

An industry wine strategy with accountability tops the list of actions at the Australian Women in Wine 2023 National Symposium

Wine industry leaders take note. Before a sell-out crowd of 140 women in wine gathered in Sydney on Friday 17 November at the inaugural Australian Women in Wine (AWIW) 2023 National Symposium, leaders proposed a list of the urgent steps needed to combat gender injustices in the Australian wine industry. As part of the day, delegates discussed, put forward and then voted on the top actions they wanted to see taken immediately. The results are, in order of priority: an industry-wide strategy with accountability measures in place; funding for AWIW and/or a full-time Diversity, Equality and Inclusion position; mentoring program available in every wine region.

“The lack of action from our wine industry leaders in combating the significant gender inequality in our industry is both woeful and inexcusable,” said **Jane Thomson** OAM, the event organiser and AWIW Founder and Chair. “We have now pulled together a list of demands directly from some of Australian wine’s brightest talent. The women in our Australian wine community have spoken - there will be no more excuses.”

In the Australian wine industry, the needle has been painfully slow to move on gender equality. In fact, on some key measures the industry has actually gone backwards in recent years. According to the ATO’s latest published figures, between 2013 - 2014 and 2020 - 2021 the gender pay gap for Australian winemakers increased by 100%, going from \$7000 to \$14,000 per year. For viticulturists and growers it’s even worse, with the gap at \$18,500. Men and women graduate from oenology degrees in almost equal numbers here

in Australia, however the latest ABS statistics show that female participation in winemaking overall is still stuck at 17%. This indicates a massive dropout rate. On Friday, an impressive line-up of thought leaders from both within and outside the wine industry offered their perspectives at the symposium, focusing on the theme “Leadership & Ambition: Exploring the challenges women face pursuing a career in the Australian wine industry and how to advance them to positions of power for the betterment of the industry.” They included much loved performer and journalist Wendy Harmer, who shared some of her strategies for success from her male-dominated career; Amanda Gome, who hosted an interactive workshop to help women counter everyday sexism; Nicky Grandorge who shared how Women in Wine NZ is closing the gender gap over the ditch; Professor Chris Wallace from the University of Canberra who spoke about women, leadership and ambition; Corrina Davison, Managing Director for American Express Australia and New Zealand, who offered her advice on how to advocate for and be an ally for women in achieving equal access and opportunity; and Kate Goodman, Katherine Brown and Gabrielle Castelluccio who shared their experiences from the wine industry coalface. A who’s who of Australian wine from around the country were in attendance, including key decision makers and CEOs, growers, suppliers, viticulturists, winemakers, sales and marketing professionals, cellar door staff and beyond. They included representatives from Treasury Wine Estates, Accolade, Pernod Ricard Winemakers, Endeavour Group, Brown Family Wine Group, Brokenwood Wines, Pinnacle Drinks, Langton’s and more.



ABOUT AUSTRALIAN WOMEN IN WINE

Australian Women in Wine (AWIW), established in 2015, is run by The Fabulous Ladies’ Wine Society and overseen by an Advisory Board of industry professionals. AWIW exists to champion the work of women in the Australian wine community and to advocate for gender equality across the sector. The National Symposium is the latest initiative of AWIW, and brings together women from all sectors of the wine industry to foster collaboration and empowerment. Current AWIW board members include Corrina Wright, Jeni Port, Shirley Fraser, Rebekah Richardson, Alexia Roberts, Dr Catherine Kidman and Jane Thomson OAM (Chair).

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WORLD WINE IMPORTS - SEPTEMBER 2023 SUMMARY

TOTAL DEADLOCK

The July-September quarter did not budge from the values recorded in June, -9%. The negative dynamics are now long-term and progressively worsening compared to 2022 and the beginning of 2023

By CARLO FLAMINI - Wine Observatory Unione Italiana Vini

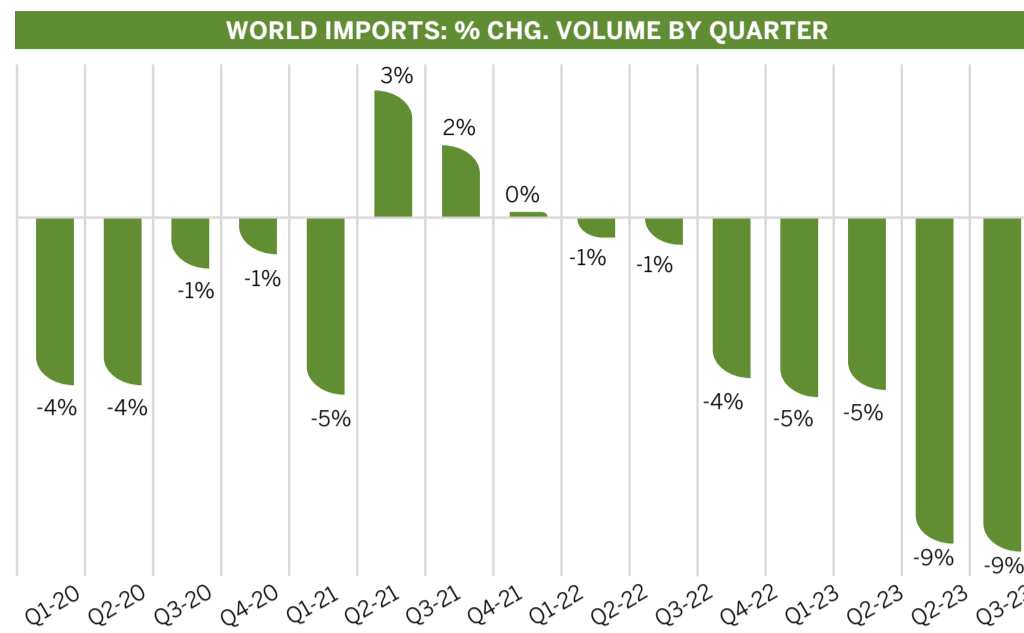
Compared to the April-May quarter, the July to September period showed no significant progress in global wine imports. According to data from the Unione Italiana Vini's Wine Observatory, during that period, trade volume remained at a -9% drop (13.8 million hectoliters as the sum of the main countries monitored), while values slightly improved, though still shrank (-5% to \$5.8 billion). Going back to January, the first nine months of 2023 saw -7% in volume and -5% in value. Over the same period, sparkling and packaged still wines suffered losses in volume (-9% since January), while still wines fared worse on value, around -5% versus -1% for sparkling. Still wines were in heavy contraction on the value side (-12%), due to decline in volume and overall reduction in average prices (-8%). Looking at long-term patterns, sparkling wines followed a gradual return to normal pre-pandemic levels, after a big boom in 2021. Growth of still wines was not that spectacular in 2021. The years 2022 and 2023 have already returned to volume levels close to those in 2019, thanks to the blockage of the Chinese market and this year's destocking by American distributors, which has considerably slowed down new wine imports. Focusing on the trend by quarters, in terms of volume, the third quarter of the year was the sixth consecutive quarter to remain below the zero line since June 2022. For packaged still wines, negative figures started even earlier, from the fourth quarter of 2021, following a progressively worsening trend, with the last two quarters closing at -9% and -10%. For sparkling, although the duration and magnitude of the drop was less obvious, the regressing curve over this year is evident, with the last two quarters standing around -10%. The last two quarters are also declining for bulk, averaging around -7%.

Still Wines

In Germany, on the still wine side, Italy closed the nine-month period at +1.7%, improving from the zero-level recorded until June. Also improving was value, from -5.6% in the six-month period to -2%, with average prices at -3.6%. Spain experienced a strong recovery accumulating a +15% volume increase since the beginning of the year, while figures for French wines were nega-

tive, especially on the value side (-7.4%). The total market reached a balance with a timid +1.3% and values down 1%, just above €1.1 billion. In the United Kingdom, despite generally rising values, aided by the weakness of the pound that forces importers to buy more, the total market went from -7% volume to -4.6%. Italy made a one point recovery since June (+1.2%). France steadily rose from -20% in March to -9% in June and -5.5% in September. Spain figures deflated (+1.8%). On the premium side, New Zealand wines improved, returning to levels similar to the first quarter of the year at +19%, from +8% in June. Wine imports from Belgium, a trading and customs clearance hub for many suppliers, including Italian (+20%), continued at a steady pace. Australian (-24%) and Chilean (-34%) remained in a downhill dynamic. Looking at the curve by quarters, the general trend for Italian wines continues its progressive reduction, with stagnation on the 30 million litre threshold against a 40-50 pre-Covid and post-Covid average. The picture in Switzerland also worsened slightly (-5% total), with Italy stuck at -1.2% since June. It was an identical scenario for France for the same period stalling at -4%, while Spain suffered a 2-point drop on top of the -5% in June. The United States experienced further worsening of the market, with September cumulative figures falling 10% in volume against -4.5% in June, and values turning negative for the first time (-3%). Italy was still heavily down (-13%), while the performance of France and Spain also worsened, becoming strongly negative since June (respectively -8% and -12%). There were confirmed declines for South Americans and Australians, while the positive dynamic of New Zealanders continues, yet at a slower pace, remaining at +15%. The curve by quarters confirms the positioning of Italian wines below pre-pandemic volumes (60 million litres per quarter), with 2023 well below the average levels of the previous year, already in steady decline. After a year of strong import flows in 2022, the market remains strongly negative (-16%) in Canada. Italy reaches -13% (a tiny improvement since June), while France is stable on the -13% of the six-month period. Wines from the United States saw slight improvement (but we are talking about -16%). There was widespread nega-

BOTTLED W. SPARKLING W. BULK W.



tivity for mid-tier suppliers as well, including Spain and New Zealand, with Australia and South America suffering peaks of over -25%. On the Eastern markets, China confirmed its negative trend with an overall drop of 29% (1.2 million hectolitres), touching all the main suppliers: France -18%, Chile -37%, Italy -30%, Spain -51%. After registering +45% in March, U.S. supplies tumbled (-12%). New Zealand (+34%) and South Africa (+33%) are the only two countries experiencing rising imports. Italian wines are worsening in Japan. After a positive first quarter and a second quarter closed at -2.5%, September imports dropped 11%, with levels similar to June (-10%). Bad luck also for Spain, which saw all the

growth built up to the middle of the year dissolve completely, while both France (-11%) and the U.S. (-30%) maintained their negative figures of the six-month period. Chile slowly progressed, although it was unable to step out of the negative (-11% from -16% in June). South Korea continues and even worsens its path to recovery compared to 2022, which had already shown signs of decline compared to an extraordinary 2021. For Italy, volume was at -30%, but the double-digit reduction dynamic involved all major suppliers, with the total market down 25% (6 points more than in June). **Sparkling Wines** Although prices seemed to be headed down in Germany

(from +11% in June to +5.7% in September), Italy (+9% to list) regained some vigor, rising to +4% volume in the balance since January after ups and downs until June. The French lost ground, with prices at +11% and volumes at -11%, while remaining steady at last year's values. The curve for quarters indicates upward consolidation of the 5.5 to 6 million litres per quarter threshold, with good prospects for the last quarter of the year, breaking through the 7 million mark. The United Kingdom experienced a slow recovery in "absorbed" volumes moving from -12% in June to -6% in September. Italy climbed from -18% to -12%. Prosecco closed the nine-month period at -9%, with -11%

WORLD TRADE: First semester Jan-Sept

	,000 Litres			,000 US\$			US\$/litre		
	2022	2023	% Chg.	2022	2023	% Chg.	2022	2023	% Chg.
USA	146,862	123,348	-16.0	1,426,965	1,246,086	-12.7	9.72	10.10	4.0
UK	115,097	107,975	-6.2	838,557	873,618	4.2	7.29	8.09	11.1
Japan	31,771	28,839	-9.2	521,445	556,426	6.7	16.41	19.29	17.6
Germany	47,897	46,768	-2.4	342,688	360,989	5.3	7.15	7.72	7.9
Switzerland	15,672	15,282	-2.5	164,001	182,154	11.1	10.46	11.92	13.9
Canada	17,051	14,805	-13.2	173,328	157,997	-8.8	10.17	10.67	5.0
France	25,591	28,973	13.2	96,549	127,124	31.7	3.77	4.39	16.3
South Korea	6,069	5,226	-13.9	71,287	76,777	7.7	11.75	14.69	25.1
Hong Kong	2,055	2,005	-2.5	54,477	61,804	13.5	26.50	30.83	16.3
China	6,307	4,767	-24.4	63,436	55,195	-13.0	10.06	11.58	15.1
Brazil	3,860	4,185	8.4	17,727	24,338	37.3	4.59	5.82	26.6
Total	418,233	382,173	-8.6	3,770,459	3,722,509	-1.3	9.02	9.74	8.0

	,000 Litres			,000 US\$			US\$/litre		
	2022	2023	% Chg.	2022	2023	% Chg.	2022	2023	% Chg.
USA	551,476	496,432	-10.0	3,707,197	3,596,066	-3.0	6.72	7.24	7.8
UK	466,835	445,300	-4.6	2,257,698	2,289,251	1.4	4.84	5.14	6.3
Germany	351,315	355,876	1.3	1,249,668	1,255,642	0.5	3.56	3.53	-0.8
Canada	213,624	179,047	-16.2	1,461,986	1,237,799	-15.3	6.84	6.91	1.0
China	167,289	119,638	-28.5	928,037	793,646	-14.5	5.55	6.63	19.6
Japan	122,959	109,620	-10.8	766,011	728,659	-4.9	6.23	6.65	6.7
Switzerland	71,142	67,549	-5.0	713,831	713,355	-0.1	10.03	10.56	5.2
Hong Kong	23,868	21,436	-10.2	708,650	669,958	-5.5	29.69	31.25	5.3
France	73,326	73,027	-0.4	395,553	365,611	-7.6	5.39	5.01	-7.2
Brazil	110,739	99,529	-10.1	323,097	309,969	-4.1	2.92	3.11	6.7
South Korea	42,705	32,240	-24.5	354,657	299,594	-15.5	8.30	9.29	11.9
Totale	2,195,277	1,999,694	-8.9	12,866,385	12,259,550	-4.7	5.86	6.13	4.6

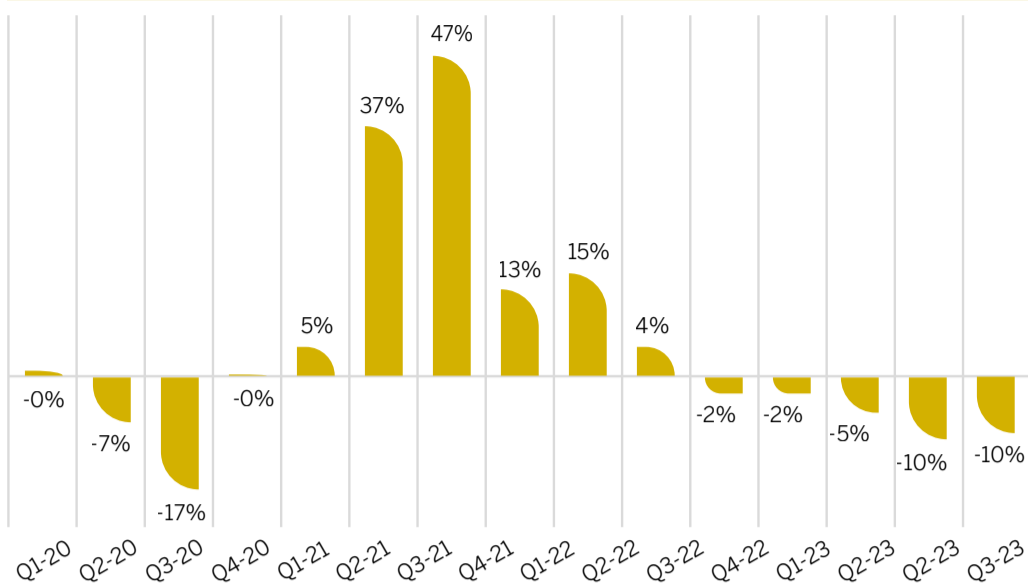
	,000 Litres			,000 US\$			US\$/litre		
	2022	2023	% Chg.	2022	2023	% Chg.	2022	2023	% Chg.
UK	364,376	328,192	-9.9	506,874	436,238	-13.9	1.39	1.33	-4.4
Germany	526,919	568,572	7.9	365,416	382,759	4.7	0.69	0.67	-2.9
USA	354,453	295,444	-16.6	309,802	225,218	-27.3	0.87	0.76	-12.8
France	342,060	325,800	-4.8	199,282	190,438	-4.4	0.58	0.58	0.3
China	87,520	64,937	-25.8	95,455	57,006	-40.3	1.09	0.88	-19.5
Canada	72,475	79,558	9.8	54,399	52,209	-4.0	0.75	0.66	-12.6
Switzerland	37,878	32,986	-12.9	58,388	49,964	-14.4	1.54	1.51	-1.7
Japan	28,785	22,552	-21.7	31,029	25,205	-18.8	1.08	1.12	3.7
Total	1,814,465	1,718,041	-5.3	1,620,643	1,419,037	-12.4	0.89	0.83	-7.5

	,000 Litres	,000 US\$	US\$/litre
Aggregated total	4,427,975	4,099,908	-7.4
	18,257,488	17,401,096	-4.7
	4.12	4.24	2.9

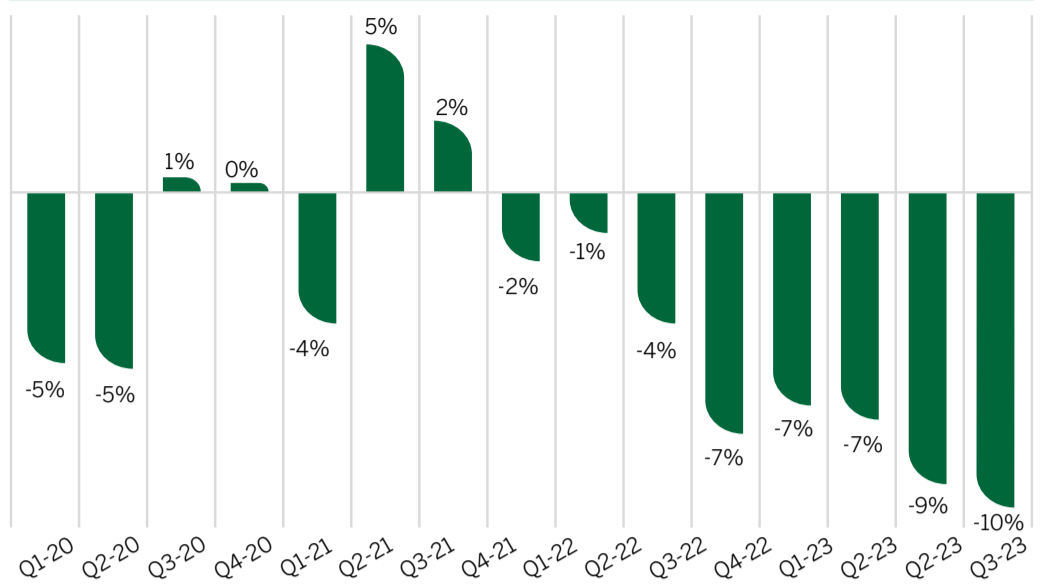
Note: % change based on USD. Please check the single countries for their currencies. Since the outbreak of the war in Ukraine, Russia stopped publishing custom data. All the data in these pages do not take Russia into account.



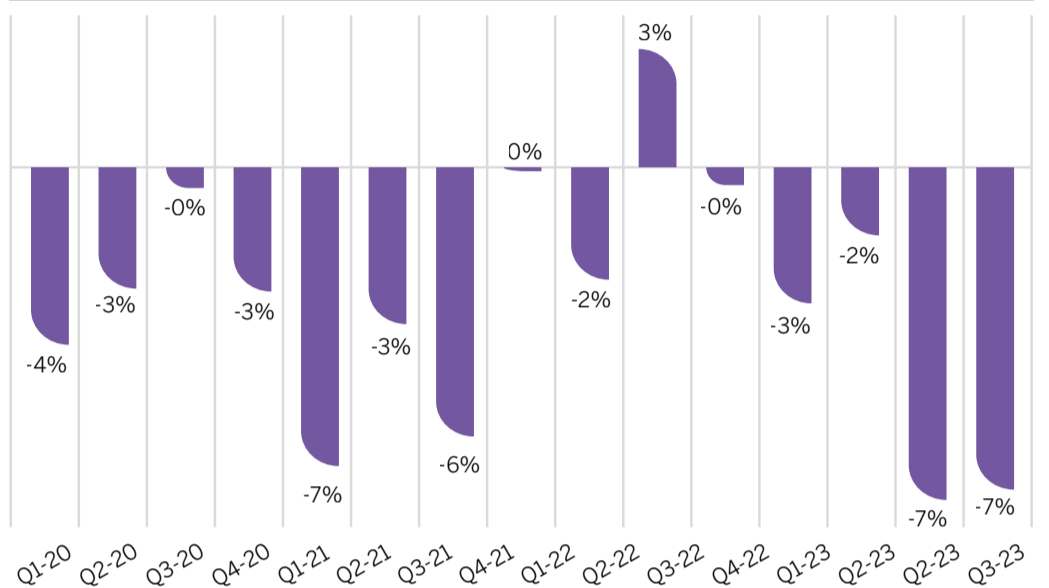
SPARKLING WINES: % CH. VOLUME BY QUARTER



BOTTLED STILL WINES: % CHG. VOLUME BY QUARTER



BULK WINES: % CH. VOLUME BY QUARTER



direct imports from Italy and +12% from Belgium, and average prices skyrocketing by 14% (now touching €4 per litre). Belgium and Spain are the only two countries dodging volume reductions, while France is slowly catching up, closing the books at -2.5%. The quarter-by-quarter trend of direct imports from Italy indicates a tough year. The figure nonetheless rises again after the downward peak of the first quarter, gradually returning to 2022 average volumes, above pre-Covid averages. France saw itself as a rapidly expanding market for Italian bubbles, increasing by 10% in volume and 26% in value, thanks to significantly growing average prices, now touching the threshold of 4 euros per litre. There was growth also for Spain and Germany, with the total market closing the nine months at +13% for values that jumped to +30%. In Switzerland, Italian spar-

ling wines are stable at 2022 levels, in a market where France and Spain are lagging behind, notably Cava, which is on average -16% over 2022. In the U.S., September worsened the June data: Italy went from -5% to -11%, with values significantly affected for the first time (-6%). Champagne remained at the -30% already recorded over the half-year, while Spain went from +6% in June to -12%. The trend by quarters highlights the difficulties of the current year, still below the threshold of 30 million litres per quarter that had marked both 2021 and 2022. We are however still above pre-pandemic and pandemic averages. Canada saw strong momentum in sparkling wine imports in 2022, but 2023's total market was at -13%, with France at -13%, Italy at -13% (improving on June) and the more affordable Spanish giving up 12% after holding up more or less unscathed until the middle of

the year. Finally, in Japan, after a slight improvement over the half-year, the negative dynamic is accentuated again, returning more or less to March levels, around -9%. Faced with rising average prices in the double-digits, Italian sparkling wines went from -7% to -12%, while Spanish wines suffered a worse situation, going from -6% in June to -19% in September. Champagne volumes are stable, demonstrating that the sparkling wine crisis affected most average-priced mid-range products.

Bulk Wines
In Germany, Spain and Italy continued to send large quantities of product through September, under pressure from inventories that were still heavy until August, especially reds. It is our country that has accelerated considerably, thanks to average prices strongly kept at bay (57 cents per litre average,

+9% over September 2022) and bringing home a +26% volume that actually dampened the Spanish boost, which fell from +29% in the six-month period to +17% in September. In France, there was a decrease in Spanish leaders, down 5% in volume and also in value, while wine imports from Italy were

growing by the same magnitude (+5%). Supplies from the global south were in sharp decline. In the United Kingdom, bulk wine continues to be negative (down 10% in the nine months), with all major suppliers in a downward dynamic. Only the New Zealanders re-

mained positive (2.50 pounds per litre average). They are playing on a different field than Australians, Americans, Chileans or South Africans. There was growth also for the Spanish and Germans, with the total market balancing the nine months at +13% for values jumping to +30%.



UNITED KINGDOM

SPARKLING W.	,000 litres		,000 Pounds		Pounds/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	15,773	-2.5	331,757	6.5	21.03	9.2
Italy	63,728	-11.9	248,891	0.1	3.91	13.7
Belgium	15,685	13.8	67,947	19.6	4.33	5.1
Spain	10,700	10.9	33,276	20.9	3.11	9.0
South Africa	564	-32.6	3,227	-15.4	5.72	25.6
Australia	396	18.7	1,717	22.3	4.33	3.0
Germany	74	-85.7	1,136	-58.3	15.26	191.0
USA	142	-41.5	1,135	-49.6	8.00	-13.8
Others	911	-24.8	11,472	-21.0	12.59	5.1
Total	107,975	-6.2	700,558	4.7	6.49	11.6



UNITED KINGDOM

BOTTLED W.	,000 litres		,000 Pounds		Pounds/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	85,363	-5.5	634,729	8.2	7.44	14.4
Italy	93,952	1.2	273,273	6.3	2.91	5.0
Spain	58,469	1.8	184,847	4.1	3.16	2.3
Belgium	50,782	19.5	145,317	12.6	2.86	-5.7
New Zealand	25,081	18.7	125,337	21.9	5.00	2.6
Australia	19,237	-23.5	68,445	-14.7	3.56	11.5
Chile	25,429	-34.0	67,191	-36.7	2.64	-4.1
Others	86,986	-12.2	338,568	-5.8	3.89	7.2
Total	445,300	-4.6	1,837,708	2.2	4.13	7.1



USA

SPARKLING W.	,000 litres		,000 \$		\$/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	26,940	-29.1	716,536	-16.1	26.60	18.3
Italy	78,833	-10.9	444,797	-6.1	5.64	5.4
Spain	14,790	-12.2	68,045	-12.8	4.60	-0.7
Germany	401	-20.0	2,206	-20.9	5.50	-1.2
Australia	236	-20.3	1,422	-16.4	6.03	4.9
Others	2,149	-21.4	13,080	-19.4	6.09	2.6
Total	123,348	-16.0	1,246,086	-12.7	10.10	4.0



USA

BOTTLED W.	,000 litres		,000 \$		\$/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	99,274	-7.8	1,204,571	8.2	12.13	17.3
Italy	161,927	-12.8	1,118,353	-10.8	6.91	2.3
New Zealand	52,071	15.3	383,198	17.4	7.36	1.9
Spain	30,663	-11.5	204,124	-3.3	6.66	9.2
Australia	47,175	-12.1	154,967	-17.7	3.28	-6.4
Argentina	27,373	-28.4	140,628	-25.3	5.14	4.4
Chile	27,587	-10.5	99,065	-8.4	3.59	2.5
Portugal	17,126	-6.3	88,617	-9.2	5.17	-3.1
Others	33,235	-11.1	202,543	-8.2	6.09	3.3
Total	496,432	-10.0	3,596,066	-3.0	7.24	7.8



GERMANY

BULK	,000 litres		,000 Euro		Euro/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
Italy	184,652	26.2	106,073	15.0	0.57	-8.9
Spain	228,615	16.7	94,294	11.9	0.41	-4.1
France	33,855	-10.7	36,937	-10.9	1.09	-0.3
New Zealand	6,943	82.3	24,359	125.7	3.51	23.8
Australia	23,649	-4.0	19,603	-17.3	0.83	-13.9
South Africa	29,531	-22.2	18,811	-12.7	0.64	12.2
USA	10,240	-49.6	13,705	-47.4	1.34	4.4
Chile	15,030	-20.3	12,267	-26.0	0.82	-7.2
Austria	7,474	-23.3	8,939	-2.0	1.20	27.8
Others	28,584	-9.0	18,365	-2.0	0.64	7.7
Total	568,572	7.9	353,353	2.6	0.62	-4.9



GERMANY

BOTTLED W.	,000 litres		,000 Euro		Euro/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
Italy	160,892	1.7	528,722	-2.0	3.29	-3.6
France	64,994	-4.4	266,011	-7.4	4.09	-3.1
Spain	63,613	14.9	142,164	10.4	2.23	-4.0
Austria	18,476	-4.7	52,380	7.3	2.83	12.6
USA	6,127	-6.6	36,363	6.6	5.93	14.2
Portugal	11,741	2.1	34,815	5.7	2.97	3.5
South Africa	6,026	-25.8	22,445	-14.2	3.72	15.7
Others	24,007	-0.5	76,264	1.7	3.18	2.2
Total	355,876	1.3	1,159,164	-1.1	3.26	3.6

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e a volte i sogni diventano realtà.*

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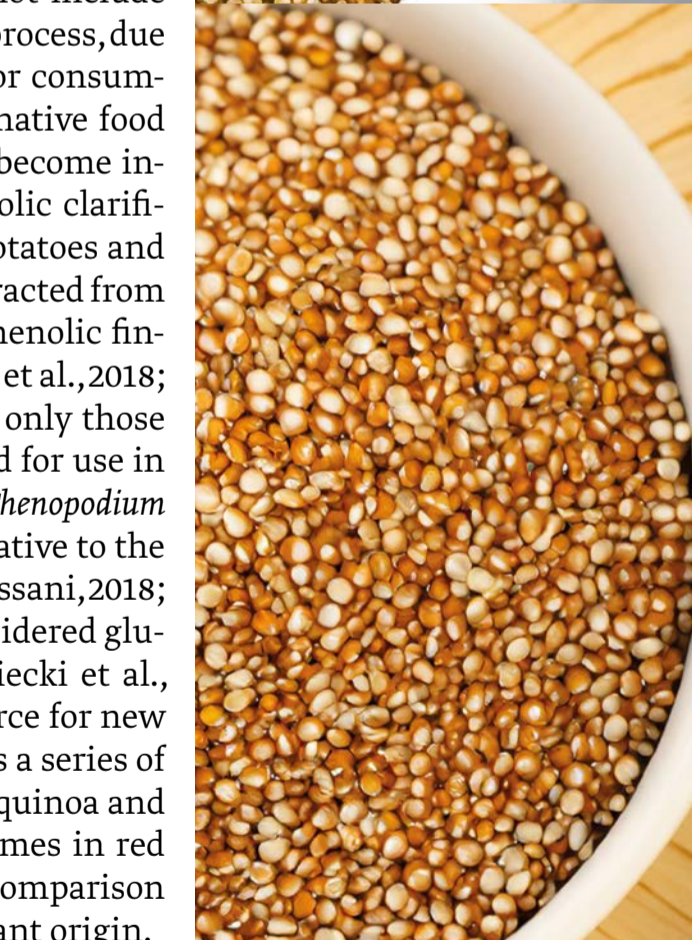
Protein Extracts From Andean Pseudocereals As Alternative Fining Agents FOR RED WINES



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INTRODUCTION

The growing demand for foods and beverages that do not include the use of animal inputs as part of their manufacturing process, due to possible allergic reactions, animal welfare concerns or consumer lifestyles, has led researchers to search for new alternative food additives. Against this backdrop, the wine industry has become increasingly interested in finding new methods for phenolic clarification of wine, and plant-based proteins from cereals, potatoes and legumes have received increasing attention. Proteins extracted from various plant sources have been proposed as effective phenolic fining agents (Gambutí et al., 2012; Granato et al., 2018; Kang et al., 2018; Maury et al., 2003), but due to their allergenic potential, only those obtained from wheat, pea and potato have been approved for use in wines (OIV-OENO 495-2013). The pseudocereals quinoa (*Chenopodium quinoa* Willd.) and kiwicha (*Amaranthus caudatus* L.) are native to the Andean highlands. They have a high protein content (Bressani, 2018; Kozioł, 1992) higher than traditional cereals, and are considered gluten-free products with low allergenic potential (Drzewiecki et al., 2003; Gorinstein et al., 2002), so they could be a good source for new plant-based protein fining agents. This work summarizes a series of trials in which the fining capacity of protein extracts of quinoa and kiwicha was evaluated at different doses and contact times in red wines of different varieties and winemaking stages, in comparison with commercial protein fining agents of animal and plant origin.

METHODOLOGY

Experiment I - The fining capacity of quinoa protein extracts (QP) at two doses (30 and 50 g/hL) and two contact times (48 and 96 h) was evaluated using three red wines (Petit Verdot 2020, Malbec 2020 and Cabernet Sauvignon 2021) at different stages of vinification, in comparison with commercial fining agents made from potato proteins and gelatin.

Experiment II - The fining capacity of kiwicha protein extracts (KP) at a dose of 30 g/hL and 48 h of contact time was evaluated in comparison with QP and gelatin in a young Cabernet Sauvignon wine.

Experiment III - The fining capacity of QP and KP at two doses (30 and 50 g/hL) and 48 h of contact time was compared with commercial fining agents based on pea protein and gelatin, using an aged Monastrell wine.

Experiments were performed in triplicate, in 50 mL Falcon tubes at 20 °C. Fining agents were dispersed in 75 µL of water, added to 40 mL of wine and mixed in a DLAB MX-F vortex for 30 seconds. The control treatment consisted of 40 mL of wine to which 75 µL of water was added. After the fining time had elapsed, the samples were centrifuged at 14000 rpm for 10 minutes and kept refrigerated for physicochemical analyses.

Physicochemical analysis - The turbidity of the samples was measured with a Hanna HI 83749 turbidity meter (Woonsocket, USA) and the results were expressed in NTU. Tannin content was determined spectrophotometrically by the methylcellulose precipitation method (Mercurio et al., 2007). The monomeric flavan-3-ol fraction was analyzed by the p-dimethylaminocin-

namaldehyde (p-DAC) assay with the COD 12834 catechin kit (de Beer et al., 2004) on a Y15 automatic wine analyzer (Biosystems, Barcelona, Spain). Total phenolic compounds were determined by Folin-Ciocalteu microassay (Waterhouse, 2003). Absorption spectra of the wines were recorded at 280, 450, 520, 570 and 630 nm on a SYNERGY HTX plate reader. CIELAB parameters and chromatic parameters of color intensity and hue were calculated from the absorption spectra using MSCV software (University of La Rioja, Spain. <https://www.unirioja.es/color/descargas.shtml>) (Ayala et al., 2014). The total polyphenol index was calculated from the absorbance at 280 nm of the wine samples diluted 1:100. Total and polymeric anthocyanins were determined spectrophotometrically according to (Ho et al., 2001).

RESULTS

The effect of fining treatments with different doses of quinoa protein extracts (QP) on the turbidity index of three red wines is shown in Figure 1. A Cabernet Sauvignon, a Petit Verdot and a Malbec wine with initial turbidity values of 38, 20 and 3.5 NTU, respectively, were used for the fining trial. All fining agents significantly reduced the turbidity of Petit Verdot wine from 20.2 to less than 5.2 NTU. Quinoa protein extracts showed reduction percentages between 74 and 91%, similar to those obtained with commercial fining agents. Treatments with 96 h of contact time with the protein were more effective. As for Malbec wine, all treatments reduced turbidity to values below 0.7 NTU, and both doses of QP were equally effective, showing reductions between 74 and 82%. As with the previous wines, the turbidity of Cabernet Sauvignon wine decreased significantly with all fining agents. At 48 h of treatment, quinoa extracts showed the best results, with reductions between 61 and 66%. After 96 h, turbidity reduction was higher, reaching values lower than 4 NTU. Our results are in agreement with those reported by several studies indicating the effectiveness of plant proteins in reducing wine turbidity (González-Neves et al., 2014; Granato et al., 2018; Maury et al., 2003). Overall, our results suggest that QP at 30 g/hL was sufficient to significantly reduce turbidity in a similar manner to commercial fining agents.

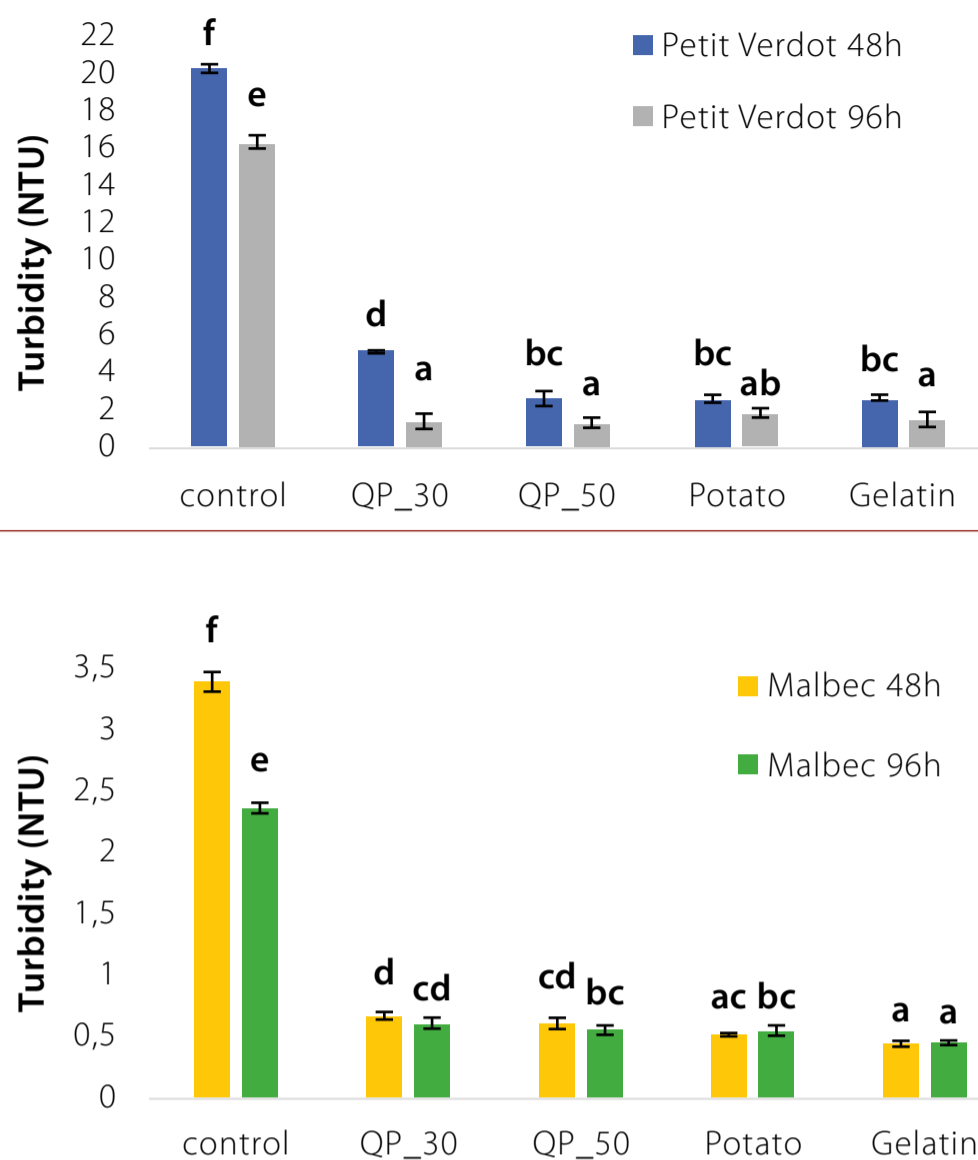


Figure 1. Turbidity index of Petit Verdot, Malbec and Cabernet Sauvignon wines after treatment with protein fining agents at two contact times (48 and 96 h). Control: untreated wine. Wines treated with protein fining agents (QP_30: Quinoa protein extract at 30 g/hL; QP_50: Quinoa protein extract at 50 g/hL; Potato: Potato protein at 5 g/hL; Gelatin: Gelatin at 8 g/hL).

EFFECT OF FINING TREATMENTS ON PHENOLIC COMPOSITION AND COLOR OF WINES

The effects of QP fining treatments on the phenolic composition and colorimetric parameters of Petit Verdot, Malbec and Cabernet Sauvignon wines were analyzed and are shown in Table 1.

All fining treatments significantly reduced the total phenol content of Petit Verdot wine (13.3 to 15.6% reduction). The greatest reduction was achieved by QP and gelatin after 96 h of contact time. In Malbec wine, only QP and Vegecoll decreased phenolic content at 48 h of treatment (12.9 and 5.2 %, respectively), while gelatin and QP did so at 96 h (8 and 22 %, respectively). For Petit Verdot and Malbec, QP at 30 g/hL was sufficient to reduce total phenols in a similar manner to commercial fining agents. In Cabernet Sauvignon wine, treatments for 48 h did not produce significant reduction of total phenols. However, the opposite was observed at 96 h, where most treatments (except QP at 30 g/hL) caused a decrease in total phenols.

Regarding tannin concentration, all treatments significantly reduced the tannin concentration of Petit Verdot and Malbec wines. QP at 50 g/hL and Vegecoll produced the most significant reduction (16%) in the tannin content of Petit Verdot wine after 96 h of treatment. Consistently, QP at 50 g/hL showed the greatest decrease in tannins (26%) in Malbec wine. In Cabernet Sauvignon wine, QP and gelatin treatments produced the greatest reduction in tannin content. In this case, QP at 30 g/hL was sufficient to obtain the best results in terms of tannin removal.

The flavan-3-ol monomer (catechins) content of the wines was not affected by any of the fining agents after 48 h of treatment, but in some cases showed differences after 96 h of contact time. In Petit Verdot wine, all treatments significantly reduced the concentration of flavan-3-ol monomers, while in Malbec wine, only QP at 50 g/hL caused a significant reduction and in Cabernet Sauvignon wine no differences were observed with respect to the control.

No decrease in color intensity or hue of Petit Verdot wine was ob-

		CONTROL	QP_30	QP_50	POTATO	GELATIN
Petit Verdot						
Phenols	48h	4074.4 ± 48.6 e	3452.5 ± 22.5 bc	3471.7 ± 50.7 c	3504.6 ± 79.1 c	3477.5 ± 34.8 c
	96h	3840.0 ± 18.0 d	3337.9 ± 50.9 ab	3273.3 ± 62.6 ab	3442.1 ± 28.2 bc	3237.9 ± 61.7 a
Tannins	48h	2454.3 ± 14.9 g	2339.5 ± 21.7 ef	2280.4 ± 14.9 de	2267.9 ± 31.5 de	2249.4 ± 40.8 cd
	96h	2427.2 ± 27.8 fg	2166.7 ± 43.7 bc	2028.4 ± 15.4 a	2144.9 ± 39.6 b	2152.5 ± 34.7 b
Catechins	48h	552.8 ± 3.0 b	548.3 ± 8.7 b	534.5 ± 6.8 b	526.2 ± 16.5 b	529.7 ± 15.3 b
	96h	552.5 ± 2.1 b	490.6 ± 16.7 a	464.5 ± 20.7 a	490.7 ± 10.1 a	475.6 ± 2.3 a
Malbec						
Phenols	48h	3104.6 ± 56.0 f	2865.0 ± 22.0 cd	2704.6 ± 19.1 b	2962.9 ± 53.2 def	3021.2 ± 31.2 ef
	96h	3037.9 ± 63.8 ef	2655.6 ± 28.1 b	2380.6 ± 9.4 a	2904.6 ± 62.6 ce	2796.3 ± 60.3 bc
Tannins	48h	2267.9 ± 7.4 f	1902.0 ± 15.0 c	1692.0 ± 6.7 a	2011.1 ± 33.4 d	2129.4 ± 15.9 e
	96h	2205.6 ± 6.7 f	1779.0 ± 11.3 b	1632.0 ± 3.0 a	1924.3 ± 35.7 c	2025.3 ± 17.7 d
Catechins	48h	228.4 ± 2.8 ac	198.1 ± 12.6 a	204.0 ± 13.0 ac	224.8 ± 12.9 ac	218.8 ± 14.6 ac
	96h	237.1 ± 10.1 c	203.9 ± 16.5 ac	198.6 ± 4.4 ab	235.2 ± 12.6 c	236.1 ± 5.3 c
Cabernet Sauvignon						
Phenols	48h	3473.3 ± 7.2 c	3458.8 ± 27.2 c	3440.0 ± 82.0 c	3473.5 ± 19.4 c	3477.5 ± 33.1 c
	96h	3454.6 ± 3.6 c	3398.3 ± 31.5 bc	3210.8 ± 38.2 a	3302.5 ± 37.5 ab	3298.3 ± 28.9 ab
Tannins	48h	2636.4 ± 36.1 c	2352.5 ± 20.3 a	2332.7 ± 7.4 a	2597.5 ± 12.0 c	2468.5 ± 35.3 b
	96h	2477.2 ± 26.9 b	2322.0 ± 7.0 a	2337.6 ± 28.7 a	2478.4 ± 15.1 b	2312.9 ± 18.8 a
Catechins	48h	435.4 ± 7.3 b	419.7 ± 16.6 ab	411.3 ± 18.6 ab	437.8 ± 14.8 b	431.4 ± 17.5 b
	96h	420.0 ± 13.6 ab	392.5 ± 12.9 a	392.7 ± 11.1 a	408.5 ± 5.5 ab	414.0 ± 12.4 ab

Table 1. Total phenols, tannins and catechins content of different red wines treated with protein fining agents at different contact times (48 and 96 h). Results are expressed in mg/L as mean ± standard deviation, n=3. Phenols: concentration of total phenols by Folin assay; Tannins: concentration of methylcellulose-precipitable tannins; Catechins: concentration of flavan-3-ol monomers by p-DAC assay. For each analysis, different letters indicate significant differences (p < 0.05).

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served after the 48-h treatments. However, treatments with QP caused a decrease in color intensity between 10-12% after 96 h. In Malbec wine, the 50 g/hL dose of QP caused a reduction in color intensity of 6%. In contrast, the color intensity and hue of Cabernet Sauvignon wine were not affected by the fining treatments. The fining capacity of kiwicha protein extract (KP) was evaluated in a young Cabernet Sauvignon wine using the 30 g/hL dose and 48 h contact time and compared with the performance of QP and gelatin (Table 2). The treatments with QP and KP at 30 g/hL and 48 h contact time decreased the total phenol content by about 4%, while with gelatin (8 g/hL, 48 h) no significant differences were observed with respect to the control. As for tannin removal, QP caused a decrease of 8%, whereas KP and gelatin reduced tannin content by about 11%. Both quinoa and kiwicha protein extracts and gelatin significantly decreased the concentration of flavan-3-ol monomers by approximately 5%. The QP and KP treatments did not affect the total anthocyanin content and did not affect the color intensity or hue of the wine.

Additionally, the effect of fining treatments with quinoa and kiwicha proteins at doses of 30 and 50 g/hL on the phenolic profile of an aged Monastrell wine was evaluated and compared with commercial proteins from gelatin (125 mL/hL) and pea (30 and 50 g/hL) (Table 2). The fining treatments applied in this trial did not produce a significant reduction in the total phenol index. According to the results of the MCP method, treatments with quinoa proteins, gelatin and with the highest dose of kiwicha proteins (50 g/hL) caused a significant decrease in tannins ranging from 4 to 11%, while treatments with pea and kiwicha proteins at 30 g/hL showed no difference with respect to the control. Treatments with QP and KP at 50 g/hL were the most effective in terms of reducing the tannin concentration of Monastrell wine. With the exception of QP 30 and P 30, the rest of the treatments affected the total anthocyanin content, causing decreases ranging from 9 to 12%, with gelatin being the fining agent that produced the greatest absolute decrease. Consequently, all treatments caused decreases in color intensity ranging from 3 to 12%.

Table 2. Phenolic and colorimetric parameters of Cabernet Sauvignon and Monastrell wines treated with different protein fining agents.

	Total Phenols (mg/L) or IPT	Tannins (mg/L)	Anthocyanins (mg/L)	Color intensity
<i>Cabernet Sauvignon</i>				
Control	2040.7 ± 17.0 a	2253.1 ± 34.2 a	410.6 ± 4.7 a	11.8 ± 0.5 a
QP_30_48h	1968.0 ± 5.3 b	2074.1 ± 9.8 c	403.1 ± 0.6 ab	11.0 ± 0.5 a
KP_30_48h	1984.0 ± 5.6 b	2012.3 ± 15.4 de	401.3 ± 7.1 ab	11.5 ± 0.1 a
Gelatin_48h	1983.7 ± 10.0 ab	2000.0 ± 24.3 ef	396.5 ± 2.7 b	11.3 ± 0.3 a
<i>Monastrell</i>				
Control	60.60 ± 8.4 a	2456.7 ± 42.9 a	172.01 ± 1.21 a	10.95 ± 0.07 a
QP_30_48h	59.35 ± 2.13 a	2317.6 ± 4.8 c	162.66 ± 2.26 ab	9.93 ± 0.02 d
QP_50_48h	57.71 ± 2.42 a	2236.0 ± 40.5 d	155.15 ± 4.03 bc	9.63 ± 0.03 e
KP_30_48h	59.53 ± 1.45 a	2416.0 ± 18.5 ab	156.82 ± 2.50 bc	9.97 ± 0.03 d
KP_50_48h	58.00 ± 2.61 a	2288.2 ± 7.4 cd	153.67 ± 4.52 bc	9.56 ± 0.03 e
Pea_30_48h	60.47 ± 3.45 a	2453.3 ± 29.0 a	162.4 ± 5.26 abc	10.62 ± 0.05 b
Pea_50_48h	60.79 ± 0.96 a	2432.5 ± 5.9 a	156.78 ± 2.05 bc	10.50 ± 0.03 c
Gelatin_48h	59.84 ± 1.67 a	2347.8 ± 1.5 bc	151.62 ± 4.52 c	9.92 ± 0.06 d

CONCLUSIONS

The quinoa protein extract proved to be as effective as commercial fining agents in reducing the haziness of the wines studied. The 30 g/hL dose of quinoa and kiwicha protein extracts was sufficient to significantly reduce tannin concentration. However, the 50 g/hL dose was particularly effective, producing the greatest decrease in all the wines studied. The QP and KP treatments slightly decreased or did not affect the color intensity and hue of the wines. The results of these trials suggest that QP and KP could be used as effective fining agents to an extent that depends on

the chemical composition or variety of the wines. However, further studies should be conducted to determine their effect on the sensory characteristics of the treated wines. QP and KP have the advantage of being non-allergenic products that could eventually be used as alternative fining agents to animal proteins.

Acknowledgements

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PREVIEWS



PROTEIN INSTABILITY IN WHITE WINES: MECHANISM OF FORMATION AND METHODS FOR PREDICTING IT

Matteo Marangon | University of Padova, Italy

Protein haze can appear in white wines during transportation and storage. This instability represents an aesthetic problem that can be prevented by removing the grape proteins that have survived the winemaking process.

The grape proteins responsible for this instability are the pathogenesis-related (PR) proteins, a class of proteins very stable during winemaking, but that can become unstable during ageing, especially when the wine is subjected to elevated temperatures during transport or storage. This instability results in PR-proteins denaturation, and this in turn leads to their aggregation and precipitation, with formation of turbidity and sediments in bottled wines.

Winemakers are still widely using bentonite fining to remove these proteins from the wine. While effective, bentonite fining is an inefficient process that can lead to quality losses in the wine due to the removal of volatile compounds associated with its use.

The development of more efficient processes for protein removal requires understanding the mechanisms such as the main drivers of protein instability and the impacts of various wine matrix components on haze formation. Additionally, to improve the efficiency of stabilization treatments, accurate methods to predict protein instability are needed. In this video Matteo Marangon reviews:

- The recent developments in wine protein instability, including the most current version of the mechanism describing how protein instability forms in white wines.
- The methods for wine protein stabilization
- The methods to predict protein instability in wines



A COMBINED ULTRAFILTRATION/HEAT/PROTEASE TREATMENT FOR PROTEIN STABILIZATION OF WHITE WINE

Yihe Sui | Australian Wine Research Institute, Australia

White wine can become hazy sometimes during storage or under exposure to heat: this phenomenon occurs because the proteins responsible for hazy phenomena are denatured. These proteins come from the grape and are known as passive genesis related proteins, they can survive after AF and can be problematic if they are not removed.

In fact, the haze formation is a multifactorial process; ultrafiltration (UF) has been evaluated as an innovative process to achieve white wine stabilization, providing an alternative approach to the traditional removal of wine proteins through bentonite treatment. In this study, wine obtained from Sauvignon Blanc was fractionated by UF, generating a stable permeate fraction and a protein-enriched

retentate fraction: subsequently, stabilization treatments involving the addition of heat or protease were applied to the retentate before the treated retentate was recombined with the permeate. These results are encouraging and indicate the potential for UF to facilitate novel protein stabilization strategies.



ROSÉ WINES: IMPACT OF PROTEIN FINING ON POLYPHENOLIC COMPOSITION AND COLOR

Cécile Leborgne et al., Université de Montpellier | INRAE | Montpellier SupAgro & Institut Français de la Vigne et du Vin | Centre du Rosé (France)

Color is one of the key elements in the marketing of rosé wines. Their broad range of color is due to the presence of red pigments

(i.e. anthocyanins and their derivatives) and yellow pigments, likely including polyphenol oxidation products. Clarifying agents are widely used in the winemaking industry to enhance wine stability and to modulate wine color by binding and precipitating polyphenols. During this study, the impact of four different fining agents (i.e. two vegetal proteins, potatoe and pea proteins, an animal protein, casein, and a synthetic polymer, polyvinylpyrrolidone, PVPP) on Syrah Rose wine color and phenolic composition (especially pigments) was investigated.

Color was characterized by spectrophotometry analysis using the CIELab system in addition to absorbance data. Fining using PVPP had the highest impact on redness (a*) and lightness (L*) parameters, whereas patatin strongly reduced the yellow component (b*) of the wine color. In parallel, the concentration of 125 phenolic compounds including 85 anthocyanins and derived pigments was determined by Ultra High Performance Liquid Chromatography coupled to electrospray ionisation triple-quadrupole Mass Spectrometry (UHPLC-QqQ-ESI-MS) in the Multiple Reaction Monitoring mode. Results confirmed the affinity of PVPP towards flavan-3-ols and anthocyanins, especially coumaroylated anthocyanins demonstrated earlier. Chemometrics analysis of the color and composition data revealed a link between redness (a*) and lightness (L*) related to native anthocyanin and flavan-3-ol concentrations. However, no specific marker was associated to patatin fining, suggesting the involvement of other pigments in the yellow component (b*). Additional data was acquired on the same set of samples by untargeted metabolomics using Ultra High Performance Liquid Chromatography coupled to an High Resolution Mass Spectrometer (UHPLC-HR-MS). Our results corroborate those of targeted analysis, demonstrating particular affinity of PVPP for native anthocyanins and flavan-3-ol but also flavonols and stilbenes. Markers of each fining treatment were also identified.

PVPP fining treatment revealed a sharp decrease in the rose wine color, especially on the redness (a*) component linked to losses of phenolic compounds such as native anthocyanin. Further investigations aiming at revealing markers of the yellow component (b*) from untargeted analysis data are under way.

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CELLI • Combined Solutions For Grassing Between The Rows In The Vineyard

The wide range of proposals for soil preparation that Celli designs, manufactures and distributes throughout the world is increasingly expanding towards combined machines. Being able to carry out different soil preparation in a single step, they guarantee operators savings from many points of view: in time and resources, as well as - also with a view to more sustainable soil preparation - in consumption (fuel) and of emissions. Among these multifunctional solutions, some are ideal for the vineyard, such as Minigo, a fixed power harrow proposed in combination with a pneumatic seeder, to allow soil preparation and sowing in a single pass. Minigo is

a small machine (the maximum width is 1.80 m), and for this reason it represents an easy-to-handle solution that responds to current market needs for refining the soil between the rows. This is a machine capable of operating with low-power tractors (between 30 and 80 HP), working the soil at a depth of approximately 26 cm and then levelling it using the rear roller, adjustable with pins. The combination of power harrows and seeders today represents one of the main lines of development of the Celli range, as also demonstrated at the latest edition of Eima where the company presented the new solution (of larger size and power) Maxi + Storm

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CMP • Vinplast By CMP: The Revolutionary System For Bottled Wine Storage



At CMP we had the intuition to make plastic pallets at the end of the 1990s. There was talk of HACCP, hygiene, recycling of materials and there were all the conditions for developing packaging in a new material. Therefore we strongly believed in the potential of plastic pallets: they were more hygienic, washable, lasted longer, had a constant tare, could be stored outside and avoided deforestation. But above all we focused on research, because plastics are not all the same, with very different results in terms of quality and safety. It is thanks to research that innovative products were born, such as Vinplast, a revolutionary system of preformed plastic interlayers designed for the management

of the bottled wine storage, which allows to replace the bulky and heavy metal cages or wooden racks. Vinplast is very light, safe and particularly suitable for the stacked bottles ageing. That's why it is also used by some of the major Italian and European sparkling wine houses: it is actually able to optimize the delicate stage of maturation "sur lie" of the classic method bottles, which can last for many years. Here in summary why Vinplast is revolutionary: it is very light, but safe and resistant; it is stackable and optimizes your cellar space; protects from dust, light, friction; it can be fully integrated into bottling lines; it is available in different formats and sizes; it is also green because it is made of 100% recycled and recyclable PET.

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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.

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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 keeping high 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. The new "DSH" version was

launched to also work on hilly grounds. Drop Save DSH, indeed, is the merge of Drop Save model and its recovery system and Bora model with its special configuration. It allows working on 2 rows with 50% recovery of vineyards on hilly grounds, thanks to its fan hanging on tractor and tank trailed by a tracker drawbar. Ideal offers anyway many other solutions for vineyard protection. In particular, the low volume sprayers with multi-row boom like Supra and Diva, permitting to spray up to 3 rows contemporarily on vineyards with a very low liquid supply per hectare, for focused treatment; and various sprayers

with axial fan, for those farms having smaller extensions or special grounds. Among all, we would remind Loire and Alsazia Top sprayer, both with tower and reverse suction but differently configured to allow proper treatments according to vineyards features; and the new Bioair model, conceived to work with less powerful tractors thanks to its hydraulic engine and to ensure focused and proper treatments thanks to its 2 stainless steel vertical fans, which ensure a high and constant air volume and a spray direct to plants to avoid drift. Please visit our website www.idealitalia.it for more information.

NORTAN • New Syncrocap Capsule Distributor

Thanks to an innovative mechatronic project (Feds Technology), the new Syncrocap distributor can automatically adapt to the different capsules to be processed, thus reducing the format change times up to 80% and the imperfections due to human intervention. Compared to standard capsule distributors, the new Syncrocap represents a significant step forward for the whole sector. Each component has been completely rethought and redesigned around the following objectives: *processing optimization, increase in reliability, reduction and simplification of maintenance, minimization of the format change times for operators.* The main heart of the innovation is the fully electronic separation and distribution group, where a new proprietary

mechatronic technology (Patent Pending) called E.e.d.s. Technology (Fully electronic distribution system) has been implemented. This leads to a reduction in setting and format change times by the operator of about 80% and to the complete elimination of errors and problems that may arise due to rough adjustments. Furthermore, thanks to a series of algorithms that encompass all Nortan experience, all mechanical devices have been eliminated and the concept of "Electronic Cam" has been introduced, which allows to automatically adapt the timing and parameters of the various components based on the type of capsule in work. The 40% reduction in details and the optimization of production processes has led to a significant increase in reliability.



VCR – VIVAI COOPERATIVI RAUSCEDO • N° 1 For Innovation In Grafted Plants Production

Vivai Cooperatori Rauscedo is the world leading company in the grape nursery market. The key to VCR's success lies in a continuous commitment to innovation, in order to provide consumers with top-quality products. Recent years have been marked by the steady introduction of digital technologies in agriculture, which have helped to tackle the major challenges, and to cope with the several drawbacks of traditional farming. Despite this undeniable progress, products tailored to meet the demands of the grafted plant industry are still lacking. For these reasons, VCR has launched a new research line focused on process automation and on the integration of artificial intelligence potentialities in quality control and monitoring activities, which at present include the projects iOSirisVine (founded), DigiGraft and VineWise (under evaluation). iOSirisVine and DigiGraft projects deal

with the automation of the post-harvest quality screening of grafted plants. They aim at developing an AI-based system for the detection and systemization of the correct morphological and anatomical features of rootstocks (iOSirisVine) and grafting point tissues (DigiGraft), using data collected with state-of-the-art sensors. These projects also focus on embedding and integrating technologies that have been already developed in other areas of the agribusiness and/or in other industries. VineWise, on the other hand, seeks to improve quality control in open-field monitoring activities, by using AI to assist VCR ampeleographers in the survey activity for the assessment of varietal conformance. These projects represent the opening gambit of a more all-encompassing and organic innovation process within the company, which once again seeks to improve by raising the bar to new quality standards.

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