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OUR MAGAZINE BECOMES "ADULT"

After two years of publications, the growth of readers from all the areas of the world where wine is produced and consumed, the development of a network of correspondents in the main international markets, Wine World Magazine becomes an independent outlet. Born in mid 2020 as an attachment to Il Corriere Vinicolo – historical weekly of Italian wine that will celebrate its 94th year of life in a few months – starting with this number the magazine becomes independent from its "mother" paper and takes off as a "mature" publication, following its mission of being "The Magazine For The New Global Wine." Thanks to our readers, who are more and more numerous and follow us from all over the world, and to the sponsors who continue to believe in our magazine. Enjoy the read – Giulio Somma, Editor-In-Chief

WINE WORLD MAGAZINE

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WINE AN ALCOHOL-FREE FUTURE?

ZERO AND LOW-ALCOHOL WINES: A MARKET TREND STILL TO BE DEFINED

Numbers are still small for this market, but show relevant growth, boosted by healthy consumptions and alcohol moderation. The use of different technologies, quality perception and the wide difference between no and low-alcohol wine, leave consumers disoriented. But clarity will be key for the future, as we read in our reportages from USA, UK, Germany, France, Scandinavia and Japan

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ENJOY READING AND, ABOVE ALL, ENJOY TASTING!

A MARKET PHENOMENON STILL TO BE DEFINED

WINE

AN ALCOHOL-FREE FUTURE?

By **GIULIO SOMMA** *and* **FABIO CIARLA**

The strong difference between no and low labels, the use of different production technologies and problems of quality perception pose some challenges for the classification. But clarity will be vital for the development of this growing category. The reports from the US, UK, Germany, France, Scandinavia and Japan depict a phenomenon with many aspects

The password is "niche," but with explosive perspectives. Our journey through the different wine markets around the world gives us a multi-faceted picture when it comes to wines with low or reduced alcohol content (no-low wine). The initial reasons that encourage a consumer to buy are, in fact, quite similar: it often starts with a health issue related to alcohol and calories, then it moves on to social acceptance and problems related to driving. The starting point is common to the many markets analysed, what is different are the prospects and possible developments of a sector that has accelerated thanks to the pandemic, with different effects during and after the lockdown in the distinct countries. The no-low wine belongs to the category of "healthy" products, although there is a classification problem. In fact, it is not clear, for example, whether these labels should be placed with the wines or, rather, on the shelf of alcohol-free drinks. The problem is not insignificant, above all in view of the possible developments of the category. To make the matter even more complicated, from the point of view of business and investment planning, are the different regulations. In fact, excise duties on alcohol often affect the categories in a different way, making the wines more or less attractive based on the range to which they belong: no or low. According to the report "Opportunities in Lower and No-alcohol Wine 2022," published by Wine Intelligence (a division of the IWSR – International Wines and Spirits Record), a fundamental problem for the development of no-low wines, intended as two categories with zero or reduced alcohol content (as perhaps it is more correct to do), is the quality of the products. Currently consumers do not recognise these wines as "quality" products, so it is necessary to improve the trust of enthusiasts in order to take advantage of a category with great potential. In this perspective, the best technology for the reduction, or elimination, of alcohol in wine is still being searched. Today at least three systems are being used, more or less expensive, with some experiences about the process still rather "confidential." The leading article of Robert M. Tobiassen, President of NABI (National Association of Beverage Importers), immediately puts in focus the major advantages of no-low wines on the US market, reflecting on the concept of "Multi-Uses for Multi-Generations." The first experiences in the field came from the USA, with "Il Fré" marketed thirty years ago by the Trinchero family. But also critics and many operators had strong doubts on these products, rejected above all for the low quality and for a certain reluctance to insert them conceptually in the "wine" sector. Germany, that is already struggling with non-alcoholic beers, seems to be the most receptive market for wine, also for a cultural matter. Historically, the Germans, starting from the Moselle, already produce and drink wines that can be considered "with a reduced alcohol content," therefore the degree of acceptance of these labels is much higher than elsewhere, as shown by the considerable investment made by Rottkäppchen for the new production plant. Even in the UK, the example is alcohol-free beer, but with a specific preference among young people, while taxation becomes a crucial issue since, proportionally, it can be very heavy on a single bottle depending on the different alcohol content. In this case, therefore, the market is also strongly oriented by the possibility of a cheaper positioning for the categories excluded from excise duties. In France the market is so small that it can be analysed with a microscope, however also here the first important production experiences are starting to take off. The concept of quality remains fundamental, margins for development are strong and they are identified in the range of "first users," in other words of people who can approach the world of wine in this way and then choose, perhaps, to turn towards traditional wines. Young people are also the engines of change in Scandinavia, where however there are important differences between Denmark, Norway and Sweden. Countries where innovations, even in packaging, and attention to issues related to health and the environment are deeply felt. In Japan, the lockdown has pushed the consumption of alcohol-free wines – considering that for a long period bars and restaurants could not sell alcohol – highlighting how the category is chosen above all by those who cannot or do not want to drink alcohol, rather than by those who normally drink wine. Here also the numbers are small, but there must be a reason if two large breweries have entered the sector.

Also in China, according to the latest polls, the no-low market has enormous potential for growth, even though here wine is not the first choice in terms of beverages and this typology makes no exception.

THE PRIZE PROBLEM REMAINS KEY FOR A NICHE SECTOR

The Need For Alcohol Moderation Is Driving Consumers Towards "NO-LOW" CATEGORIES, WINE INCLUDED

By C. M.

According to the new "Opportunities in Lower and No-alcohol Wine 2022" report, published by Wine Intelligence, a division of IWSR, low-no alcohol wine appears set to grow strongly, from a low base, on the back an increasing consumer need for moderation. Challenges remain for both categories, with quality concerns still the main barrier, along with strong competition from the same beer category

The interest in moderating their alcohol consumption has been progressively increasing over the past decade amongst drinkers, creating a long-term market opportunity for wines with a lower alcohol level, even if this category has not reached, especially in the US market, the same level of impact of other lower ABV options, in particular ready-to-drink (RTD) alcohol products.

The "Opportunities in Lower and No-alcohol Wine 2022" report, published by Wine Intelligence, a division of IWSR, has registered a relatively high awareness levels for the No/Low categories but their usage levels remain low. Despite the increasing volumes, and the high awareness, lower and no-alcohol wines remain niche categories. In most markets fewer than one in 10 drinkers has bought either lower or no-alcohol wines in the past year.

In the US market, where the lower alcohol wine category is valued at over $1bn, according to IWSR the forecasted volume CAGR (Compound Annual Growth Rate) growth is of approximately 27% for lower alcohol still wine and 30% for lower alcohol sparkling wine between 2021-2025. This growth forecast is supported by consumer insight from Wine Intelligence, which shows that the opportunity index for lower alcohol wine in the US in 2022 has significantly increased from where it was in 2021.

Moderation as the main driver

Moderation is on the rise across many core markets, with about half of global consumers saying they are now cutting down on alcohol: 48% of global wine drinkers are moderating their alcohol consumption in some way, with 1 in 4 saying they are switching to lower alcohol options, suggesting that lower and no-alcohol wine categories have significant untapped potential. However, this has not yet translated into a significant broadening of the customer base for no/lower-alcohol wines, few regular wine drinkers buying it in most markets, as we previously said. With sales volumes increasing in many markets, this suggests increased consumption has come from those already drinking no/low-wine.

Wine Intelligence forecasted a strong volume growth, even if from a low base. Broad-based and sustained growth would occur in both lower and no-alcohol still wine, though lower alcohol market is still bigger than no-alcohol. The key markets are forecast to continue growing over the next five years; for still wine, growth in the US is notably high.

When analysing the performances of the different wine categories, no/low sparkling wine had a mixed performance. Low-alcohol sparkling wine, in fact, has seen a decline in global volumes and no-alcohol only a small growth in 2019-21. However, both categories are expected to grow more strongly in the 2021-5 period.

The Wine Intelligence Opportunity Index score for no-alcohol wine is improving. No-alcohol wine has recorded consistent growth in its Opportunity Index score from 2020, suggesting the wine type is beginning to cut through with consumers post-Covid, while Index score remains low because of low usage penetration.

Motivations and barriers

So, what are the key drivers encouraging consumers to try and enjoy lower alcohol wine? Of course, it's the perceived health benefits – including lower in calories – that is the key motivator with Millennial drinkers being significantly more likely to choose wine from this sub-category compared with others, especially in the US. These consumers, when it comes to choosing lower alcohol wine, give a strong consideration to extrinsic factors, including the desire to be seen drinking lower alcohol wine options within their peer group.

OPPORTUNITIES

- Moderation trend growing across major markets
- Japan as a growth market
- Opportunities in China
- Health concerns area core motivation

THREATS

- Quality and taste remain major barriers
- Expectation that lower/no-alcohol wine should not cost more than regular wine
- Strong competition from low/no beer

LOWER ALCOHOL WINE BARRIERS TO PURCHASE *

The key barriers to lower alcohol wine are negative taste & quality perceptions and not being viewed as a credible substitute to full strength ABV wine

% who would see the following as reasons not to buy lower alcohol wine
Base = those who are aware of lower alcohol wine but have not sought to buy and would not consider buying it

		Global average
1	I dislike the taste	27%
2	It's not really wine	25%
3	My favourite wine does not come in a lower alcohol version	23%
4=	Lower quality than standard wine	21%
4=	Does not contain enough alcohol to feel an effect	21%
6	Poor quality wines	16%
7	Difficult to find where I shop for wine	15%
8=	Higher price than standard wine	12%
8=	Lower alcohol wines are an aberration	12%
10	My friends don't seem to drink it	11%
11	It's not clear from the bottle what it is	9%
12=	They are mass produced wines	6%
12=	I would be embarrassed to be seen drinking it	6%

NO-ALCOHOL WINE BARRIERS TO PURCHASE *

The top barriers of no alcohol wine are largely functional, with it not being seen as a substitute for wine containing alcohol

% who would see the following as reasons not to buy no-alcohol wine
Base = those who are aware of no-alcohol wine but have not sought to buy and would not consider buying it

		Global average
1	It's not really wine	33%
2	I dislike the taste	30%
3	Does not contain alcohol	29%
4	Lower quality than standard wine	21%
5	My favourite wine does not come in a non-alcoholic version	18%
6	Difficult to find where I shop for wine	14%
7	Non-alcoholic wines are an aberration	13%
8	My friends don't seem to drink it	11%
9	It's not clear from the bottle what it is	7%
10	I would be embarrassed to be seen drinking it	5%

* Global weighted average includes data from Australia, Belgium, Brazil, Canada, China, Denmark, Germany, Ireland, Japan, Netherlands, New Zealand, Portugal, Singapore, Spain, UK, USA % / %: Statistically significantly higher / lower than global average at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Oct '21, Jan'22, (n=17,019), global regular wine drinkers

Personal and functional benefits lead the motivations for no-alcohol wine. Health concerns and avoiding the cognitive impacts of alcohol are top motivators for choosing these drinks Price and peer perception rank much lower as drivers for most regular wine drinkers. Wellbeing needs and the desire to remain in control are key motivators for purchasing both wine types, and better distribution and in-store merchandising will be key to translating needs into purchase.

Quality is the most significant barrier to lower and no-alcohol wine purchase. The key barriers to lower alcohol wine are negative taste and quality perceptions and not being viewed as a credible substitute to full strength ABV (Alcohol by Volume) wine; the top barriers for no-alcohol wine are largely functional, with it not being seen as a substitute for wine containing alcohol. This can suggest the category has work to do on product innovation, as well as persuading consumers that switching to no/lower-alcohol wine won't compromise enjoyment.

Are consumers willing to spend more?

A key strategic question for producers, distributors and retailers of lower alcohol wine is price. Will consumers pay the same or more for lower alcohol options, or are they expecting lower prices due to lower alcohol content? The prevailing, current global consumer view is that lower and no-alcohol wine should be the same price or cheaper than regular, full-strength wine; this follows the same patterns as other low/no beverage types, posing a challenge for brands due to the higher cost of producing these beverages. In that case, given the additional costs in producing the product, successful brands will need to focus on demonstrating value through packaging, suggesting that price is not a key barrier for the future growth and potential of this category.

Opportunities and threats

The Wine Intelligence report, when it comes to market opportunities, has focused on how the interest for lower and no-alcohol wines is growing in Asia. Alongside with Japan, China is a market to watch for. It leads the Opportunity Index for both wine types based on awareness and perceived enthusiasm. Chinese drinkers of both types are more likely to come from segments highly involved in wine in general – no other significant differences.

The data collected by Wine Intelligence over the past 5 years amongst regular wine drinkers have been telling a similar story: a wine with a lower alcohol level may be a good option in principle. However, consumers can be disappointed by the taste profile, especially those with a stronger affinity with "traditional" wine, driving them to opt for alternative lower alcohol options instead. This is one of the reasons why younger LDA+ consumers (Legal Drinking Age), in particular in the US, are not participating in the wine category in the same way in comparison with previous generations.


Robert M. Tobiassen

CONSUMERS ARE SEEKING NEW DRINKING OPTIONS

No-Alcohol Wines: Multi-Uses For Multi-Generations

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

Times are changing in many ways and consumption of alcohol beverages is no different. Consumers in the United States are looking for the next new drink, thinking about their own wellness, especially after more than two years of COVID health risks, and, very significantly, consumers of all ages are expanding the diverse range of beverage alcohol products they select for an occasion. Maybe your appetizer drink is a beer, then wine with your meal, and finally a brandy, cognac, cordial, or liqueur after dessert. For watching a sporting event, it is beer while attending a theatre performance it is a glass of wine.

No-alcohol wines, beers, and distilled spirits are part of this diverse range of products that today's consumers are seeking. While most consumers looking for a no-alcohol product will think first about beer, no-alcohol wine is clearly an expanding market. Reportedly, in 2021, the internet searches for "non-alcoholic" products rose by 10 percent compared to 2020. The reason? Multiple uses for different occasions by different generations.

A Perfect Fit for All Occasions

A baby shower party for an expecting mother will frequently want a no-alcohol wine for all to share in the celebration. A high school graduation party with many 18-year-old students want a no-alcohol sparkling wine to celebrate and not a sparkling apple cider or pear perry, noted Jon Wiant, The Wine Outlets, who appeared previously in an article on sustainability and organic wines. Recall the legal drinking age in the U.S. is 21. Personal concerns over wellness and good health are leading consumers to drink less alcohol, so these products fit that niche. The advent of a "Dry January" following a drinking binge holiday season leads consumers to these no-alcohol wines. As we approach the hot summer months, sangria is popular and some hosts want a no-alcohol version for themselves or their guests. In bars and restaurants, many bartenders and servers prepare "mocktails" that require a wine component, so these no-alcohol wines neatly fill that need. You can probably imagine many more occasions where no-alcohol wine is a perfect fit. Finally, no-alcohol drinkers at a party or celebration may feel more socially comfortable with a no-alcohol wine or beer in hand than drinking a carbonated soda or sparkling water.

A Perfect Fit for All Generations

Multiple generations of consumers have different interests for selecting no-alcohol wines. Generations X and Z along with Millennials have a wellness focus, whereas "baby boomers" of the older and senior generation are looking to reduce their alcohol consumption because of the onset of certain health conditions

The President of the National Association of Beverage Importers analyses the role and the strengths of this new trend, which continues to grow also in the most important market in the world

or simply a desire to drink less alcohol and party less. One sales manager of a very large wine retailer with a nationwide presence told me that he estimates that 90 percent of his sales of no-alcohol wines are to consumers aged 60 years and older. The shop that I visited is located in a very financially well-off community with a larger population of seniors. However, the sales manager of another very large retailer with a store in a community that is heavily populated by younger professionals also finds consumers demanding this no-alcohol product.

Consistently for several decades, it is estimated that approximately 34 percent of the adult legal drinking age population in the U.S. will never consume a beverage alcohol product. For this consumer segment, these no-alcohol wines may offer an option for expanding your "wine" market to these consumers. Personally, at some events recently, I have seen temperate or abstinent drinkers try a no-alcohol beer or no-alcohol wine.

A Perfect Price Range for Everyone

No-alcohol wines are much less expensive than wines at 12 percent alcohol by volume (ABV) and above. In the United States, no-alcohol wines range in prices from $8.49 to $14.99 USD for a 750 ml. bottle. No-alcohol wines and beers are not taxed by the Federal Government and likely most States have the same practice. For consumers facing tighter personal budgets from inflation and other life-style changes, these products provide an affordable option. For regulatory background information, in the U.S. the Federal labeling regulations distinguish between "Alcohol-Free," meaning no level of detected alcohol, and "Non-Alcoholic," meaning not more than 0.5 or one-half of one percent, alcohol.

The U.S. Marketplace Today

The U.S. marketplace offers consumers no-alcohol wines produced domestically as well as imported from France, Germany, Spain, and South Africa, among other countries. I understand that Italy does not allow yet the production and export of no-alcohol wines, so Italian producers are foreclosed from this U.S. marketplace. It is difficult to determine precisely the names of all imported brands because the label approval system administered by the Alcohol and Tobacco Tax and Trade Bureau (TTB) does not require a certificate of label approval for wines not over 7 percent. This decision is required by the underlaying Federal law. Accordingly, these no-alcohol wines are labeled under rules by the Federal Food and Drug Administration. As a result, the bottle or container label must have an ingredient list and a Nutritional Panel. Even though popular and increasing in popularity, no-alcohol wines still represent a very small portion of the wine marketplace. Very large retailers may offer four to six different brand names at most on their shelves. And in many stores, these products are on the shelves next to non-alcoholic mixers and not with the standard wines. Several retailers that I spoke with said they sell approximately two 9-lters cases every five weeks. (The sales managers pulled up this number by looking at the inventory turnover on their hand-held device on sales and inventory location so the numbers are accurate.) This translates to about three to four bottles per week.

As a result of their lower price points, the profit margins are smaller on these brands. Considering the shipping and transportation costs, especially today in the supply chain meltdown, the profitability of a foreign winery breaking into the U.S. marketplace is minimal. One cost reducing option is to ship the bulk no-alcohol wine to the U.S. for bottling and labeling here.

For a well-known winery with many brands, the offering of a no-alcohol wine brand to round out or fill out its range of products may be attractive, even if not highly profitable. The goodwill with the other brand names of that winery may attract consumers to your no-alcohol wine brand. Many years ago, I think wineries did not want to introduce a no-alcohol wine brand because it lowered the reputation of the winery. Today, in this ever-changing world of consumer demands, that is no longer the case. You will not "cheapen" your image.

The available of retail outlets for no-alcohol wines will expand in most States because no-alcohol wines are subject to less regulatory controls than beverage alcohol brands. One distiller producing a no-alcohol spirit said "Non-alcoholic products are now appearing in a number of specialty retailers outside of conventional drinks channels as well, such as fashion retailers, coffee bars, and even gyms."

Cheers and enjoy your wine whatever its variety, geographical indication, or alcohol content. Pleasure to you is the guiding star.

PANDEMIC BOOSTS NO AND LOW-ALCOHOL PRODUCTS

In 2022 Record Growth For Zero And Low-Alcohol Wines In The U.S.

The history of this typology starts 30 years ago, with the intuition of the Trinchero family, which started producing the "Fré" at the Sutter Home winery in California. However, a strong boost for consumption certainly came with the pandemic. In fact, interest in de-alcoholised wines grew rapidly in the first quarter of the year. But critics have yet to be won over by quality

By **JEREMY PARZEN**

The Washington Post, the Wall Street Journal, Forbes, Town & Country, Wine Spectator, Wine Enthusiast, and Good Housekeeping. These are just a handful of the top English-language mastheads that have featured zero and low-alcohol wines – de-alcoholised wines – in the first half of 2022. And that's not to mention the countless trade publications that have also run feature-length posts on the category, like the popular industry-focused blog SevenFiftyDaily.

These articles are not being written by low-level editors and citizen bloggers. Some have been penned by top writers in the field, like Alison Napjus for Wine Spectator and Liz Thatch, Master of Wine and revered wine educator, for Forbes. Others were penned by industry leaders like Christy Frank, a partner in the Copake Wine Works, a noted retail operation based out of New York's Hudson Valley.

But even before this cresting wave of heightened media attention began to roll over the country, roughly 3 million Americans had already viewed "Sober-curious: Alcohol-free wine, cocktails and spirits grow in popularity," a featured story on NBC's morning show "Today," which aired on December 21, 2021.

The heightened media attention, concentrated


Jennifer Hoffman

in the first quarter of 2022 but already buzzing in late 2021, is just one indication of how demand has grown in the U.S. over just the last three years.

Let's explore the market of "No-Low" wines

Zero and low-alcohol wine — no-low wine, as it is known — is just one of the categories in a growing non-alcoholic beverage market that is expected to grow from $923 million in year sales to 1.7 trillion by 2028, according to the editors of the NBC show (note that the non-alcoholic beverage market also includes beer, spirits, and faux cocktails; data via NieslenIQ).

"The interest in no and low-alcohol alternatives continues to grow – said **Steve Lohr** –, as consumers look for more 'better for you' solutions in many beverage and food items."

His family's company, J. Lohr, the brand behind some of the best-selling wines in the U.S., said that sales of their de-alcoholised Ariel label grew by 66.3 percent over the "pandemic years," 2020 and 2021.

"Whether one celebrates Dry January – added Lohr – or simply chooses low alcohol alternatives occasionally, so that one can more fully enjoy their favorite adult beverages other times, the category is poised for continued healthy growth. As no- and low-alcohol offerings continue to increase, along with their quality and flavor options, there will be more exploration by consumers."

The origins of no-alcohol wines in USA

De-alcoholised wines in America can trace their roots back to the early 1990s, when the Trinchero family, owners of the historic Sutter Home winery in St. Helena, California, first began producing their "alcohol-removed wine" known as Fré (written "fré" in early iterations using a Renaissance-inspired font).

"A new machine allows vintners to take the alcohol out of real wine," wrote the editors of Popular Mechanics in a feature story devoted to the wines, published in March, 1993.

"Some time ago – wrote Joe Oldham in the issue's letter from the editor – when we wrote about non-alcoholic beer [in 1991], we proved that drinking and driving could be compatible. Now technology takes the concept one step further for those of us who enjoy a glass of wine with dinner. Gina and Bob Trinchero at the Sutter Home Winery – he tells his readers – are employing new technology that allows them to remove virtually all the alcohol from real wine. Don't confuse Sutter Home – he adds – with the white grape juice on your super market shelf. This is a real wine, fermented, aged and processed like any other wine, but with the alcohol removed." At the time, Fré was "offered in two varieties. One is a White Zinfandel, boasting a pale salmon color. The other is a Chardonnay, characterized by a pale-gold straw color. Except for the final de-alcoholising step, both varieties are made in the same manner as their alcoholic namesakes."

Today, Trinchero Family Estates, founded by the family that made "White Zinfandel" a household name in 1980s America, oversees the top-selling FRE brand of "alcohol-removed" wines, as the group likes to call them. They include a Brut, Chardonnay, Moscato, White Zinfandel, Merlot, Red Blend, Rosè, and Cabernet Sauvignon.

FRE "continues to far outpace overall category trends and effectively resonate with today's consumers," said Trinchero Family Estates marketing director **Jennifer Hoffman** to Corriere Vinicolo. "The brand is off to a great start in 2022; FRE saw 26 percent growth in January 2022 compared to January 2021, and 88 percent growth compared to January 2020. Looking at the last 52 weeks, FRE is up by 23 percent."

It's important to note that no-low wines represent only a small fraction of the non-alcoholic beverage market. "The non-alcoholic wine category," noted Hoffman, "is still an emerging segment within the larger wine category, worth approximately $50 million" in a more than $900 million industry. But the category seems to be growing at an exponential rate.

"Non-alcoholic wine sales are up more than 22 percent – she wrote – selling at twice the rate of the total wine category."

Hoffman also made a subtle but important distinction between "alcohol-removed" or "de-alcoholised" wines like FREE and "non-alcoholic" wines, which have failed to rival the former's rapid rise in popularity.

"Alcohol-removed wines are a sub-segment within the non-alcoholic wine category – she added – and they account for more than 90 percent of all incremental sales growth within the non-alcoholic wine segment."

The importance of technology

Spinning cones were first allowed for use in the de-alcoholisation of wine in the U.S. in 1993, the same year the Popular Mechanics piece was published.

The technology, first developed in Australia, uses a series of rotating and stationary "cones" that are mounted in a tall, narrow steel tank known as a "spinning cone column." Once the selected wine has been fermented and stabilized, it is introduced into the column where gravity causes it to flow through the series of cones. During this first run through the column, nitrogen is introduced to "strip" the aromas of the wine — its "essence." Roughly 90 percent of the essence of the wine, which represents only about 0.5 percent of the total volume. The essence is removed from the nitrogen and reserved. All of this process is carried out at a slightly elevated temperature, just above "room temperature." The wine is then introduced a second time for it to be de-alcoholised. After the second run has been completed, the essence is recombined with the de-alcoholised wine.

"The Spinning Cone Column – wrote the author of the Popular Mechanics piece – removes only 20 percent of the total volume. Periodically, a small amount of non-alcoholic wine is re-injected into the Spinning Cone Column to maintain volume levels. The temptation was to use water but 'the hope was that use of wine as re-injection liquid would add to the overall quality,' says Bob Trinchero."


Steve Lohr

Who are no-low wines consumers?

At the time, it would have been hard to imagine a thriving market for de-alcoholised wine in the U.S. But once again, the "inventor" of White Zinfandel had created a winning formula for an entirely new category of wine. It would only take the wine world another 30 years to catch up with Gina and Bob's vision.

"Backed by 30+ years of leadership in the non-alcoholic category, FRE Alcohol-Removed Wines has grown by connecting with younger consumers who are seeking a balanced lifestyle," said Trinchero Family Estates marketing director Hoffman.

"Nearly 40 percent of the brand's consumer base belongs to the Millennial and 21+ Gen Z generations, a rate well above the representation of those generations in the total wine category. Our investment in digital marketing – including our investments in social media and mocktail videos, plus a recent partnership with eMeals – has furthered our connection with this younger drinking-age audience. We're excited to share that FRE will be launching a TikTok #; the #FREwines hashtag on TikTok has already received more than 600k views."

Forecasting continued opportunity for rapid growth, the company is investing heavily in both on- and off-premise sales programs, including robust educational programs.

"Taking notice of the no/low-alcohol category momentum – said Hoffman – stores have begun creating designated 'better-for-you,' 'non-alcoholic' and 'de-alcoholised' wine shelf sets with FRE as a featured offering. These on-shelf categories are creating a need for more consumer education. We are seeking to educate consumers about the difference between 'non-alcoholic' and 'de-alcoholised' wine, as this difference sets FRE apart from other brands. Consumers can find this education across our support materials and within content curated on our social media accounts."

"Dry January," "Sober October," and "Mindful March"

Increasingly, grass roots movements to curb or eliminate alcohol consumption and encourage alcohol-free entertaining have begun to take shape across the U.S., especially among young wine drinkers. The most popular of these, "Dry January," is believed to have originated in Europe. But by the beginning of 2021, roughly one year after the first reported cases of Covid, the month-long event had become a quasi-formal campaign for measured abstinence in the country.

In a survey of more than 2,000 participants in early January, 2021 by a leading research firm, Morning Consult, "13 percent of U.S. adults said they're giving up drinking for the first month of the year, compared to 11 percent who said they have done so in previous years."

"Reasons for partaking in Dry January vary – wrote the author of the report – but the most common explanation among this year's participants is that they're trying to be healthier. More than three quarters of adults observing Dry January agreed with that statement, while 72 percent said they're trying to cut down on drinking overall."

Even as heightened health concerns continue to drive the growing interest in de-alcoholised wines, top critics and industry opinion leaders seem unimpressed.

The title of Alison Napjus' de-alcoholised wines January 2022 feature for Wine Spectator ran with the following title: "Are There Any Good Non-Alcoholic Wines?" The answer would seem to beg the question.

She conducted a non-blind tasting to research the category, she wrote, including the category's two best-selling brands.

"How does de-alcoholised wine taste?" she asks. "I sampled roughly a dozen de-alcoholised wines... As a group, I would describe them more as alternative beverages with wine-like elements rather than wine substitutes. Several seemed notably sweet. The wines that showed some sweetness often included candied fruit, fruit cocktail or even daiquiri-like flavors."

The Wine Spectator editor's lukewarm response to the wines seems to be reflected in reactions from U.S. importers and wine writers who were also contacted for this piece.

"I have no experience with, or opinion on, zero and low-alcohol wines – said a California importer of nationally-distributed Italian wines who asked for their name not to be used – Rather the contrary, we are dealing with the seemingly inexorable increase in alcohol due to global warming."

"I would gladly give one to see my name in print – responded another prominent U.S. importer of Italian wines – but sadly I have almost no thoughts on the topic," other than remembering his parents drinking FRE in the 1990s.

Will de-alcohlised wine's popularity continue to grow as researchers and winemakers predict? The fascinating story begins on page...

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MBF25
A FAMILY JOURNEY SINCE 1997

After witnessing the success of low alcohol beer, the wine industry has now turned its sights to similar products. Non-alcoholic wines are slowly beginning to prove that consumers can reduce their alcohol intake without sacrificing flavour. The German market seems very receptive and is in part already used to low alcohol wines, as confirmed by some producers, who have already invested conspicuously in last-generation technologies

By **JOEL B. PAYNE**

DRY JANUARY... ALL YEAR ROUND

If anything has ever changed the way Europeans drink alcohol, it was certainly the pandemic. However, the current picture does not look exactly like most observers would have expected. While more than a quarter of the population drank more during the lockdowns, one in three consumers took active steps to manage their drinking. According to Alcohol Change in the United Kingdom, some 7% even stopped imbibing entirely. Wise Bartender, an alcohol-free drinks retailer there, saw its business grow by 500% almost overnight, probably buoyed by Dry January, a campaign started in 2014 that encourages people to abstain from alcohol for the first month of each year.
Whether consumers are truly seeking healthier lifestyles, or merely temporarily cutting back their alcoholic intake – such as during pregnancy or to improve sleep – is not yet well understood, but there is no doubt on the fact that non- and low alcoholic drinks are rising in popularity. While some consumers find the thought of wine without alcohol to be a contradiction in terms (and laugh at those who drink them, much as they do at vegetarians who eat hamburgers with soybean patties) the volumes currently being sold suggest that these products have struck a nerve in the market. Sales are exploding, in particular for non-alcoholic sparkling wines like La Gioiosa's bubbly Glera, Freixenet's Legero or Rotkäppchen's Sekt.
Although part of this trend, the science behind how to remove alcohol from beer, wine or fizz nonetheless often appears complicated for the consumer hoping to purchase a quality product. There are just too many choices, and their number continues to rise.

Cutting back on alcohol, but how?
Every consumer must first remember that fermentation is a transformative process. Yeast doesn't just turn sugar into alcohol, but also engenders a myriad of aromas, flavours and textures. The challenge of making low- and non-alcoholic wine is thus how to remove the alcohol from a fermented juice, which is often at 12 to 14% alcohol by volume, without unduly impairing the mouthfeel, balance, typicity and quality. As the brewers learned before in perfecting their low- and non-alcoholic beers, it is not at all easy. Currently, there are three main methods in use, but the jury is still out on which is the best.


Bernhard Jung

People who cook with wine know that simmering a sauce for hours will evaporate most of the alcohol. While it is conceivable to remove the alcohol from wine in this fashion, it has an adverse effect on taste. For that reason, reverse osmosis is for many the preferred method of dealcoholisation. This technique, which is essentially a sophisticated cross-flow filtration system, separates the constituent elements of the wine based on their different molecular sizes. To do so, the fermented wine is pushed against a semipermeable membrane with tiny pores. Certain components of the wine, such as alcohol and water, pass through the filter because they are smaller in size and lower in weight. Larger compounds, such as the phenolic acids that create the wine's mouthfeel, are instead collected and then added back to the original water once the alcohol is removed, resulting in a "wine" with less than 0.5% alcohol by volume, which is the definition of "alcohol free" in most markets.
This method is not only the most affordable, but it is also mobile, so that the unit can be brought to the producer's cellar. The two other methods use more expensive, fixed equipment, which requires wines to be transported first to the service centre and then back to the estate. Although reverse osmosis has been proven successful for this and other reasons, the technique uses a significant amount of water, which renders it less environmentally friendly. Moreover, the removed ethanol cannot easily be reused as it is too diluted.
The other standard method is thermal (or vacuum) distillation, which as the name implies uses heat to remove the alcohol from wine, but the process takes place in a vacuum, which allows the distillation process to occur at lower temperatures, typically between 27 and 35 degrees centigrade, using steam instead of direct heat. Carl Jung from Rheingau first came up with the idea over one hundred years ago. Inspired by expeditions to the Himalayas, which reportedly used rapidly boiling water at extreme altitudes, he succeeded in extracting alcohol in a vacuum and patented the process in 1907. Today, his company in Rüdesheim is now one of the largest producers in the world, processing over ten million litres of wine each year, both for his own label and those of his numerous clients. "Over two thirds of the volume is sold offshore," explains **Bernhard Jung**, the managing director of the family business. "Canada is our largest market, but Saudi Arabia and the Emirates are growing

very fast." In fact, his total sales have expanded so rapidly that he is currently installing a second, larger column that will effectively triple his production capacity. Moreover, as he also sells brandy, he puts the extracted alcohol to good use, maturing it in oak barrels beneath the castle that houses all the operations.

Today's stills are more sophisticated than those Carl Jung built a century ago, passing the wine first through a vacuum chamber to remove all volatile compounds and then returning the remaining liquid for a second run at higher temperatures to remove the alcohol. Afterwards, the original compounds are reintroduced to enhance the aroma and flavour of the dealcoholized wine.Not everyone, though, believes that this is the proper order to approach dealcoholization. Companies like Flavologic in Vaterstetten, who work with the applied science of True 2 Aroma (www.true2aroma.com), maintain that much of the aroma in wine resides in the alcohol itself and thus use a filter to capture as much of it as possible. They work with EAZ Petershans in Bittenfeld to first dealcoholize the wine and then recover the aromas with their patented technology before adding them back to the water. **Claudia Geyer**, one of the founders of Flavologic, believes that they "can capture 70% of the original aroma" with this new method.

Before such techniques as these two were perfected, many producers preferred to use aromatic grapes that retained more of their varietal character in spite of the originally more invasive techniques. While that is no longer necessary, and almost every well-known international variety can now be found on some shelf, Torres' Muscat 'Natureo' attests to that original assumption.

On the positive ledger, vacuum distillation not only uses less water than reverse osmosis, but the ethanol removed from the base wine can be used to create other products, which potentially makes this option a much more sustainable choice.

Many winemakers, particularly in the United States, thus now prefer the newer spinning cone technology, which is also popular in the perfume industry. These columns are similar to those used in thermal distillation, but are swifter and more efficient in separating the constituent elements. In this method, which also involves repeated low-temperature evaporation, the wine makes two passes through a centrifuge that contains both fixed and spinning cones attached alternately to the walls of the column and a central rotating shaft. While the wine is introduced at the top under vacuum, steam is pumped into the column from below. The centrifugal force of the spinning cones thins out the wine, stripping it of those compounds that are volatile. It typically takes only 20 seconds for the liquid to move through the column so that industrial units can process well over one hundred litres per minute.

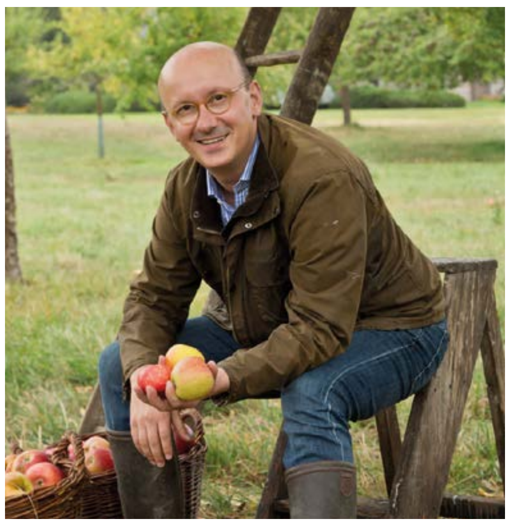
Dealcoholization happens in the second step, which takes place at a somewhat higher temperature, reducing the ethanol to the required level, which in the case of a dealcoholized wine would be below 0.5% alcohol by volume. The aroma and flavour compounds that were collected in the first pass, including those healthy antioxidants found more often in reds, are then returned to the wine, much as in thermal distillation, to return the mixture as close as possible to its original form.

Although all three methods are now used to make non-alcoholic wines, they were originally used more often to either concentrate the wines of lesser vintages as an alternative to chaptalization or to remove a modest amount of alcohol from bolder wines in warmer years. In particular, warmer regions of the New World, which have seen their alcohol levels rising due to both improvements in viticulture and climate change, wanted to lower the alcohol levels on some of their wines from 15.5% to a more modest 13.5%.

This was often done by removing the ethanol from 10% of the batch and then returning the water and flavour compounds to the remaining volume. While wine critics like Robert Parker thought that this was a better solution than harvesting early and running the risk of unripe fruit, producers such as Joel Peterson of Ravenswood argue that such technological fixes remove a sense of place from the wine. If a wine has the depth, structure and tannins to balance the alcohol, he argues that it should be accepted on its own terms.

EU legislation and many different types of no alcohol wine

While the European Union allowed these "adjusted" wines from countries in the New World,


Peter Van Nahmen


Stefan Nienaber


Johannes Leitz

such as the United States and Australia, to be imported and sold here, the use of all three methods was banned in Europe itself until fairly recently. Only in its Code of Winemaking Practices in 2009 Europe legalised dealcoholization in its Commission Regulation (EC) No 606, but limited the adjustment to 2% alcohol by volume. In 2012 the International Organisation of Vine and Wine (OIV) slightly raised that bar to 20% of the original volume of alcohol, but even that is currently under review as some members of the community would like to see it eliminated altogether. Each individual country can, of course, be stricter in its implementation of the laws, but not more lenient.

Much as for an adjusted Zinfandel, the quality of the original base wine is vital to the resulting non-alcoholic product, regardless of the method employed. Moreover, the best always begin as fermented wines and are thus generally designated as "dealcoholized" or "alcohol removed" on the label. Some might even be aged. Non-alcoholic wine brands that skip that process are more similar to grape juice and labelled merely as "alcohol free." However, as grape juice often has residual sugar levels similar to those of a late harvest dessert wine, they taste very sweet.

Peter Van Nahmen, who is one of the leading producers of high quality juices in Germany, has enjoyed a certain success in Michelin starred restaurants as an alternative to wine, but recognises their limits and thus turned his attention first to Fruchtsecco (Fruitsecco), which generates better margins, and, more recently, to sparkling Juicy Teas. "With only thirty grams of residual sugar," he says, "our Earl Grey Zitronengras Pfirsisch (Earl Grey Lemongrass Peach) is a viable alternative to traditional sparkling wines and is even being sold by the glass at Nagaya, a two star restaurant in Düsseldorf."

While the aroma of a dealcoholized wine can resemble a quality wine, and be complex, most are made off-dry in style containing 28 to 35 grams of residual sugar in order to reproduce the mouthfeel of alcohol. As with any other still wine, dealcoholized varieties come with different levels of acidity and tannins that reflect not only the grape selection, but also the fact that the acids, tannins and sugars are concentrated in the distillation process. Some producers also add other flavours or even tinker with techniques to improve their texture. Newer techniques are currently being trialled to further lower the level of residual sugar to perhaps only 15 grams, especially that of the sweeter tasting fructose component, including some adapted from the process of making cider.

For the moment, though, the consensus is that the carbon dioxide that provides the bubbles to a sparkling wine is the most elegant way to balance the residual sugar. The market appears to agree, with fizz dominating the sales of non-alcoholic wines. **Stefan Nienaber** of Rotkäppchen, however, sees their current success merely as a result of the fact that it was long technically easier to make an interesting non-alcoholic sparkling wine. However, as the still wine market is significantly larger, he believes that "non-alcoholic still wines should one day have more potential."

The liberty to add or remove components at will reflects the fact that a drink with less than 0.5% alcohol is not technically a wine, but is instead classified as a food product, which provides its makers with a larger range of possibilities than would be allowed under wine law. The only restriction is varietal labelling. Wine law demands only that Cabernet Sauvignon be 85% of the liquid in the bottle. For a food product it must be 100%.

Quality remains a key element

That said, you don't want to deacidify or remove tannins from a wine that has been dealcoholized, so it is better to begin with less pungent base wine and add them, if necessary, later with the sweeteners. Nonetheless, in spite of their some thirty grams of residual sugar, most alcohol-free wines contain only about 20 calories per standard pour, which is 85% less than full strength alcoholic wines and thus a boon for those worried about their waistlines.

Interestingly, it is currently still permitted to remove alcohol from a chaptalized wine, but that loophole will probably be closed soon. It makes no sense that you can add sugar to an anaemic base wine to raise the alcohol level and then remove it. "Hopefully – says **Johannes Leitz** (Weingut Leitz, Rheingau) – this will raise the average quality of the wines being sold as alcohol free." Too many of the cheap bottles on the shelf are made, he thinks, from poor base wines. While he has been very successful in creating a higher quality image for German wines with labels, such as his Riesling Eins Zwei Zero at €8,95 a bottle or his sparkling version at almost €11, and was even featured on a full page article in the New York Times, the larger market is being built by industry leaders such Rottkäppchen, who have their own high performance to minimise costs, control distribution through the multiple retailers and pitch their products at more aggressive points.

The price problem: nobody wants to pay more to obtain "less"

Alexander Koch from the estate of Bernhard Koch in the Pfalz, provides a good example of why the larger players dominate the market. It is a question of economies of scale. He thought of making a sparkling Gold Muskateller, but realises now that it is too expensive for small estates. "It would cost me well over a euro a bottle – he claims – to have the alcohol removed, the aromas restored and bubbles injected, but our clients believe that it should be less expensive because it is missing something, namely alcohol."

Stefan Nienaber of Rotkäppchen understands the problem only too well. "We line price our alcohol-free version of any given wine with that of the standard label," he explains, "but actually they should be more expensive." This should be clear to anyone who looks at the problem with the eyes of a Chief Financial Officer. Not only do distillation costs vary from just under ten cents to almost a euro per litre depending on the volumes being processed, but you also lose almost 15% of the liquid in the process and must pay to have the extracted alcohol destroyed. "They should be 20% more expensive – agrees Johannes Leitz – but the market is not there yet."

With a smile, he adds that "a cabriolet with no roof is more expensive than a normal car. Why can't a wine with no alcohol bear a higher price?"

Another to ask himself the same question is **Ernie Loosen,** Decanter's Man of the Year in 2005. A stalwart of the Mosel, who launched Dr. Lo with his brother, Thomas, he has always smelled new opportunities long before others. Although he did not begin his work at the family estate to turn around and take the alcohol out of wine, he has never been afraid of innovation, as was readily apparent at his presentation during ProWein 2022. "We have three trump cards – he explained –. First, we start with only 8.5%, so the distillation process has less alcohol to remove; second, consumers already expect our Rieslings to have a fruity residual sugar; and third, our high levels of acidity provide a natural balance." Not surprisingly, his major markets are Scandinavia, England and the United States, where this style of light Riesling is already popular.

Loosen has his wines distilled at Trautwein, an old family owned and operated winery in Lonsheim in Rheinhessen that was one of the pioneers of low- and non-alcoholic wines in Germany. A respected service provider, they have also made a name for themselves by trying to make the process affordable for smaller producers and are now even able to handle volumes as low as 1,500 litres. To build their operation into a viable business, they founded a separate company, Full Gut, and hired Thomas Horn to run it. Recently, Franz Josef Dernst joined the team as its key account manager, indicating that the family sees a future in this segment.


Alexander Koch


Ernie Loosen


Christof Queisser

The market of no-low alcohol in Germany

While some non-alcoholic wines – like Ariel in the United States – have pushed prices higher, the volume is growing instead at the lower end. Moreover, the market is still in its infancy. According to Nielsen figures, the entire market in Germany in 2021 was only 9.14 million euros, with an average price of €3.56. In this niche, Rotkäppchen was the market leader with total sales of 3.2 million euros and a slightly higher average price of €3.78. Total growth, though, was over 20% and the number of new consumers nearly doubled, which bodes well for the future. **Christof Queisser**, the chief executive officer of Rotkäppchen-Mumm, was particularly pleased that "the strongest demand came from households of consumers in their thirties, which confirms our leadership in this category."

While divining where this market is headed is like reading tea leaves, most players are very upbeat. "Beer also went through a long phase of learning by doing," says Johannes Leitz. "We are now in that phase for wine." It will nonetheless probably be a long time before we see a bottle of Petrus with 0.5% on its label because such a Pomerol's unique qualities are the result of climate, soil, varietal character and barrel ageing that probably can never be reproduced without alcohol, but the number of better non-alcoholic wines is growing at least as fast as the demand for them. Moreover, some of them age more gracefully than any aficionado would ever think possible.

ROTKÄPPCHEN, A MARKET LEADER BETTING ON TECHNOLOGY

When Rotkäppchen bought its spinning cone column in 2016 from Flavourtech for what was reported to be around 15 million euros, it was, with that of Torres in Spain, one of the first three units in Europe and the largest of its kind in Germany. Established in 1987, Flovourtech is a global technology manufacturer headquartered in Australia, specialising in aroma extraction and recovery. Although their original quest was to develop a processing solution to remove sulphur from grape juice in the wine making process, they quickly realised that the device they had built could also be used to recover aroma and remove alcohol from liquids, allowing them to produce low and zero alcohol wines.

According to Christof Queisser, the chief executive officer of Rotkäppchen-Mumm, "the technology is like nothing else on the market. It captures aromas and flavours at a lower temperature and with shorter residence times than standard extraction units. A gentle process, it produces a higher quality product than any other on the market and ensures that the natural aroma and delicate flavours of the base wine are retained."

Using gentle heating and a short residence time of only 25 seconds, it largely avoids thermal degradation. In the column, steam separates the volatile compounds from the wine under vacuum. A vertical, stainless steel vessel with a central rotating shaft, it contains a series of alternate rotating and stationary cones. The rotating cones are attached to the shaft, the stationary ones fixed to the wall.

The wine is fed into the top of the column, flowing as a thin film approximately one millimetre in thickness down the upper surface of the first stationary cone. It then drains through the outlet of the stationary cone onto the base of the spinning cone immediately below. The centrifugal force, generated by the rotation of the cone, causes the liquid to flow upwards and outwards, breaking up as it moves.

At the same time, steam is introduced into the base of the column. The vapour flows upwards, across the surfaces of the liquid films, separating the volatile compounds from the liquid. As both the temperature and flow rate can be controlled, it allows different aroma profiles to be captured.

As Rotkäppchen's unit can process one thousand litres per hour, analysts believe that their total production costs might be as low as €0,25 per litre, giving them a financial edge over their competitors. Although the resulting product should be at least that much more expensive, "we line price our non alcoholic version of any given wine with that of the standard label," explains Stefan Nienaber, the international director of Rotkäppchen, whose sparkling wine of the same name is the market leader.

TAXATION COULD BE A GAME CHANGER

Still Far From Big Numbers, But The Trend Is Growing

British consumers appreciate the latest news in the field of no-low alcohol, a trend that is still dominated by beer, but can exploit a few advantages also in the wine field. It succeeds in attracting young consumers, it's chosen for health issues but also by people who need to drive after drinking and, possibly, it can avoid alcohol taxation, which in the UK is particularly heavy. It remains to be decided where these products have to be placed, on the wine shelf or on that of no-alcohol beverages?

By TOM BRUCE-GARDYNE


Amanda Thomson


Tom Smith


Robin Copestick


Richard Bampfield


Alastair Bennett

"For brand managers and innovation leaders in the wine category who like a challenge, the no-alcohol and lower alcohol wine sectors represent, respectively, the Everest and K2 of the industry," claims a recent report by Wine Intelligence. The research company is now part of the IWSR which put this new sub-category's share in 2021 at just 2.2% of total wine in the UK. There is clearly a mountain to climb.

At present, 80% of the "no/low"' space is taken up by beer, followed by wine at 16%, according to the IWSR, which forecasts that 'low/no' wine will enjoy a compound annual growth of 5.5% a year until 2025. That may not match the current hype around the subject, but it is still impressive for a sector of the market that barely existed a decade ago.

No or Low? Not always the same

While most accept that "no" means less than 0.5% alcohol by volume (abv), what about its partner in crime? "Low, to me, means something different than to you or the next person on the street, so, I think it's very confusing for drinkers," says **Amanda Thomson**, CEO and founder of Thomson & Scott. It certainly is, "low" means under 7.5% abv (alcohol by volume) for the IWSR and less than 5.5% abv for the tax man, although if you want to pay zero duty the maximum strength is currently just 1.2% abv.

Thomson launched into the alcohol-free sector in late 2019, with her eye on a younger, 20-something demographic who, she says "are drinking less, but it doesn't mean they're not doing lots of naughty things." Naughty being the name of her brand, an organic sparkling Chardonnay listed by Waitrose and Majestic in the UK at £9-10, and now joined by Naughty Rouge, a dealcoholized South African Syrah, with a white and rosé in the pipeline.

UK wine drinkers are not getting any younger, according to the IWSR, which estimates that over half of regular consumers are now over 55, while only 26% of 18–34-year-olds admit to drinking wine on a monthly basis. A decade ago, it was double that amount. To address the issue and try and recruit the next generation into wine, there has been a flurry of activity in the market.

The "quality-perception" factor

Hardy's is launching its "Hardy's Zero" range of Shiraz, Chardonnay and a Sparkling wine into supermarkets in June, priced at £5.50. While in May, its parent company Accolade Wines unveiled its "&Then" Chardonnay and Cabernet Sauvignon at £8. Both ranges were produced using a new technique called Zero Tech X, which the company has "first-to-market access to," says Accolade Europe's marketing manager, **Tom Smith**.

In his view, "the [no/low] category continues to be haunted by persistent outdated myths concerning inferior product quality, poor taste and the misguided perception that these products are only drunk by those who cannot drink alcohol beverages and therefore not for 'regular or average drinkers'."

But these myths will be dispelled by this new technology, which he claims is a "gentler process to remove alcohol" and "retains more of the aroma, body and flavour of full-strength wine and requires less sugary additives versus traditional de-alcoholising techniques." A 125ml glass apparently contains just 25 calories and 1.5g of sugar.

Alastair Bennett, commercial director at the UK wine importer Fells, has been watching with interest. "If Accolade are doing it at £8 there must be something in it, as they lead the charge in terms of commercial wine in the UK," he says. Fells represent Torres whose 0% Muscat-based Natureo has been around for over a decade, and has since been joined by a red and a rosé. The fact the brand now has three listings in supermarkets which periodically delisted it in the past, given its premium £6 price compared to a 'no/low' average of £3-4, shows how "the category is 'premiumizing' and people are looking for better quality," says Bennett.

Whether or not Zero Tech X is the solution to making decent quality 0% still wine, **Robin Copestick**, MD Freixenet Copestick, believes "someone's going to crack it sooner or later." For now, he reckons, "it's just easier with sparkling wine. The bubbles lift the drink up a bit, and make you feel you're having a bit of a treat as well." His Freixenet 0.0 and iHeart Zero sparkling wine are both "pretty successful," he says. "It's definitely an expanding market where consumers are willing to pay a bit more, so we're finding it's worth spending the money on the packaging and the quality of the liquid."

"Taxes" could change everything

The holy grail of finding the technology to strip out alcohol and nothing else from a wine is an expensive quest, but in the UK, there is a reward of £2.23 per bottle - this being the current rate of excise duty. That prize does not exist in markets like Italy, where wine pays no duty. In Britain that £2.23 tax is levied on all still wines from 5.5 - 15% abv, but that may well change next February, if the UK Treasury decide to charge according to strength. The idea is to keep the current rate for wines at 11.5% abv, and add or subtract around 10p for each 0.5% above or below that level.

As Bennett says: "with commercial wines in the supermarkets there could be quite a significant shift to lower alcohol wines in that 7-9% abv space." **Richard Bampfield**, a master of wine who consults for Lidl, agrees: "I think it could totally change the strategy for a lot of brands. If I was in German wine - he says - someone like Reh Kendermann, for example, who has real expertise in making lower alcohol wines naturally, I would be looking at that sector with a great deal of interest."

If new tax rates do come in, UK consumers may start looking at the %abv on wine labels in a way they never had before. But Amanda Thomson reckons the "no" alcohol space is "completely separate" from any lower strength category that may develop. "The majority of our consumers love fine wine, but want balance in their lives," she says. For her, this represents a much bigger opportunity for wines with no alcohol, rather than catering to those who don't drink at all for whatever reason.

The shelf problem: wine or beverage?

The IWSR estimates that up to 90% of this category is sold in the off-trade, and says its "research shows that there is little demand for no and low alcohol wines out of the home." Within the supermarket there is debate going on about where best to display these "no/low" wines in the store. "That's the million-dollar question," says Thomson. "My dream is to be in both places - in a separate alcohol-free section and next to Champagne." To which the buyers' response may well be "dream on," since very few products are given two separate listings in a supermarket. "My personal preference," says Robin Copestick, "would be to be in a no-low section."

When the UK went into lockdown during the pandemic, the off-trade in wine boomed and many consumers traded up, but those trends have gone into reverse, reports Alastair Bennett as Britain sobers up and returns to 2019 levels of consumption. He is confident there has been switching from regular wines to their 'no/low' equivalents perhaps during the week. Quoting research from Kam Media, Accolade's Tom Smith says: "More than a third of UK adults have now consumed a low or non-alcoholic drink at home, and it is even higher when you just look at Generation Z and Millennials, who have been leading this trend in recent years. There is a strong trend to moderation and greater appreciation for personal health, which has been accelerated by the impact of Covid" he continues, adding: "The most cited reasons for the appeal of low and no alcohol are that it enables them to drive home and not drink excessively at social events." For Thomson, "women have been a very natural demographic, but we're finding younger men into fitness have found "Naughty" very natural because it fits into their lives."

Having tried the wine, Richard Bampfield had no qualms with the quality, but would personally be just as happy drinking a sparkling elderflower cordial at a fraction of the price. Thomson is unfazed, however. "I love scepticism - she insists - the more sceptical people are, the more they close their minds to innovation, the more it offers brands like mine the chance to disrupt an industry that is very scared of disruption."

For now, the sector is very small, and while it may be growing fast, it is off a tiny base. That said, the UK wine trade might pause to consider the fate of an entirely different drink. Twenty years ago, one imagined that plenty of dairy farmers would have dismissed the idea of 'oat milk' as complete nonsense. Today a third of all milk sold in the UK is plant-based. It is a sobering thought.

A HEATED DEBATE IN A SECTOR WITH SMALL NUMBERS

In France The No-Low Market Moves Slowly Forward AMONG DOUBTS AND CURIOSITY

By **CHRISTOPHE ANDRIEU**

Everybody is talking about the new "no-low" wine market. Beyond words and trends, this market is still very difficult to value in France and we might put it under a microscope to analyse it. But new products foresee real growth, most probably in three distinctive ways. Even though questions persist on the sustainability of technological processes, quality, price and image of the product: especially for partially-dealcoholised, are these wines or not?

It's evidence. Degrees are in the heart of our century. As the planet heats up, year after year, the wines seem not to be able to resist the increase in their degrees. And it's really the opposite of what the consumers want. Less and less seems to be the new mantra. Reasons are multiple. At the top, health is the queen of the category. And the two years of pandemic have probably increased these feelings. Everybody has seen how things could be fragile and many people are now more concerned by their new blood tests and doctor's opinion.
It's a fact, the « no-low alcohol » wines market has grown during the lockdown year. But what are we talking about? "Today, the no-low wines market is less than 1% in volume -reminds us **Jean-Philippe Perrouty**, director of French data society Wine Intelligence (IWSR Group) - Of course, we are able to observe a real in-


Jean-Philippe Perrouty


Benjamin Loze


Rémy Grassa


Frédéric Chouquet-Stringer

crease to this market, but we have to consider that we really started from nothing!”

A trend that is confirmed by **Benjamin Loze**, buyer for Match supermarkets in France, Belgium and Luxembourg: “On the no-alcohol wine market, in our stores, we have noticed a growth of 12,8% from 01/01/2022 to 31/05/2022 compared to same period a year before.”

If we focus on the low-alcohol wines, the quite new operator Moderato has doubled his production (30.000 bottles last year, 60.0000 this year) and if we are talking about wines with lower degrees, the trend seems to be the same for the famous winegrowers family of Gascony, Domaine Tariquet with the 9,5° degrees cuvée “L’Imprévu” (meaning “the Unexpexcted”) with 15.000 bottles for the first millesima (2020) and probably more for the next one. But naturally, we are not talking about similar products. Some are wines, the others are wines with de-alcoholization process (no or low) and there are even some perfect 0% alcohol products which are not grape juices like the “Petit Béret” brand (21 different references, red, white, rosé and sparkling).

All of them can be put easily in the big basket of No-Low, but it’s time to zoom on these different “niches.”

Real wines, lower degrees

Depending on labels and regions, dealcoholized wines are below 8.5°or 9° (European rules establish that a wine between 0.5° e 9° is partially dealcoholized, while below 0.5° it’s dealcoholized.) Above that level, we are still talking about wine, real wine. Of course, with climate change, for the last three decades it has been easier to reach stronger degrees than the opposite. Naturally, some regions, some varieties and some early harvests may produce wines with lower degrees. With some know-how you can lower your degrees and find a large public which is in demand for these kinds of wines. Despite the difficulties, to lose one or two degrees is quite reachable. To produce a wine under 10° is already another story. That’s the choice the big family of producers from Tariquet made two years ago, when then surprised everybody with their “Imprévu” cuvée, a 9.5° based on Riesling (66%) and Ugni-blanc (34%).

“Fortunately, in our Gascony area, the oceanic climate, with hot days but fresh nights in August, already allows us to make wines with lower degrees of alcohol (between 10.5° and 12.5°) – says **Rémy Grassa**, one of the two brothers in charge of Domaine Tariquet –. As winegrowers (single estate), we wanted to produce a lower degree wine in the vineyard, without dealcoholization in the cellar. So, it has been a long process to produce this wine. Technically, the job has begun with a lot of work in the vines. To obtain such a sufficient skin maturity without any herbaceous flavors and a very well-balanced body, it means that our soils must be full of life and allow the early harvests.”

That’s why they planted Riesling some years ago and why they chose the very “diplomatic” Ugni-blanc for the assembly. The result is quite stunning. You still have a real wine in your mouth with a lot of aromatic flavors, but the lower degree gives instantly a more drinkable wine. “Of course, this is the kind of products we have to explain to the consumers. But for the last two years, the market has evolved quite fast on this topic. Two years ago, it was not so easy to talk about these kinds of wines – said Grassa – Now, we see that some markets are very positive.”

This “Imprevu” wine could look like a first step in a trend of lower alcoholic wines, specifically when we are talking about Tariquet, a brand that has been very innovative on the white wines market for the last four decades (8 million bottles per year, the half only for the “Classique” version). So, what’s the next step? Low? No? “It’s important to have a 9.5° wine in our range, but we have to be cautious. As a single estate, our new products should be consistent with the rest of our range – explain Rémy Grassa – and, actually, we have not tested de-alcholization methods at the estate.”

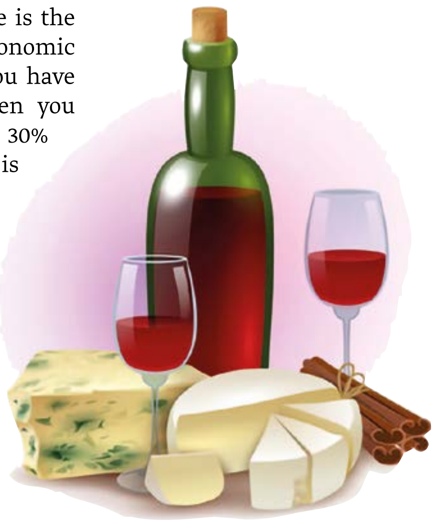
Right now, the door for a real no-low wine seems to be closed for Tariquet. And Benjamin Loze agrees with this fact: “The lower alcohol market has already been a big topic for some years. Consumers are more and more oriented to wines with lower degrees. It’s easy to see how some northern areas have been big winners in this new trend. It’s probably an explanation of the good results of red wines from Loire Valley or even from Beaujolais. Freshness and drinkable wines are sought by consumers, specifically the younger ones. I don’t think that consumers want a wine with a technologic process of de-alcoholization, I just think they want a lighter wine. It’s more a matter of wine growing, with different new varieties, why not more Cabernet Franc in the right bank of Bordeaux in substitution of Merlot for instance? Why not having a different way to manage these vines?”

And the GDO buyer is finishing with a not very optimistic sentence: “The no and low alcohol wines are just considered as technological wines. Until now, it has been a great flop even for bigger companies with a powerful marketing.”

There is No and… No

Obviously, when the topic of “no-low” is on the table, we mostly think of wines without any alcohol, meaning probably few alcohol and the twenty-year process of de-alcoholization with different methods. “There are three techniques of de-alcoholization: the vacuum distillation, the spinning cone column (SCC) and the reverse osmosis – tells us **Frédéric Chouquet-Stringer**, founder of Zenothèque, an expert of the no-low products –. They all have their strengths and weaknesses and there is often a decision to be made between quality and price. In fact, we can use different methods for different markets. The SCC is supposed to embody the future, but, until now, I didn’t find products proving there is a much better result with it. It’s surely a good solution for huge volumes. My preferred solution is the vacuum distillation linked with a regain of aroma through absorption. There are only two machines in Europe made by my partner. It is a bit more costly but scalable and offers the possibility to do some tests with very tiny volume (10 l.).”

If the majority of the operators are using this range of de-alcoholization methods, French “Petit Béret” founder, **Fathi Benni**, has chosen a completely different process: “Indeed, with French sommelier Dominique Laporte, we found a new method based on the removal of sugar from the must before the alcoholic fermentation. We first chose to eliminate the de-alcoholization processes. For us, it’s a kind of heresy. You have to make an alcoholic fermentation and then to heat the wine and remove some of the alcohol. And don’t forget to add some aromas and a lot of sulfites… Where is the environmental and economic logic? I can’t believe you have to vinify first and then you have to… de-vinify. It’s 30% of additional costs. It is completely absurd!”



A very original approach that of Petit Béret, awarded in 2015 with the guarantee of famous French institute INRA, but still unclear and quite secretive about the sugar elimination method.

But of course, the “Petit Beret” founder and now owner of the first 0% alcohol château based in Saint-Chinian (Languedoc) has a very iconoclast vision. “I think we are the only no-alcohol producers to say that we are making products for everybody except for the… wine drinkers! It’s a complete recruitment market, that’s all. Non-alcoholic wines will never replace wines on wine menus.” Even if the target isn’t the classic wine-consumers, his brand has adopted most of the codes of the wine (types of bottles and labels).

The more than one or two million bottles producer (sold in 41 countries in the world) knows a lot about this market. “When I was a rugby player, – said Benni – I used to party a lot after the games. But, for some personal reasons, I didn’t want to drink any alcohol and it was a little bit weird to party with my Coca or glass of water. It was frustrating. Why not having the possibility to taste the aromatic profiles of some varieties of grapes without having the alcohol inside?” After this inner question, he found an answer with the multi-awarded French sommelier, Dominque Laporte. “We wanted to innovate, to create a new drink based on different varieties, but free of alcohol and with a very new process. Our goal has never been to create a new kind of wine. Definitively, we are not making wines. Our Petit Béret range is made for invisible people, – explain Benni – the one who were not able to drink alcoholic drinks for many reasons, religious or for health issues. Now they can share an experience and be considered as the other drinkers.”

Dominique Laporte and Benni went even further on this approach by a wine-food pairing research with some great chefs like Gilles Goujon, three Michelin stars near Narbonne in the south of France. Actually, the main national market is made by the wine retails and fine restaurants. “It’s very difficult to explain our products in supermarkets because there is simply no range for these kinds of products. In a supermarket, you can find easily 22 references of free alcohol beers, but only 2 offer a 0% alcohol wine. And there is a big difference between the no-alcohol beer and the wine markets. For a beer, consumers are expecting freshness. For a wine, even with low or no alcohol, it’s more of a ritual,” concludes Fathi Benni.

A low… visibility

Clearly, the question of visibility in GDO is a great topic. “The demand is there. I’m not sure it’s the case for the offer – adds Jean-Philippe Perrouty – In my opinion, the market will grow enough when there will be more choices.” Historically, this category of no-alcohol wines has been dominated by 3 or 4 operators (Festillant, Bonne Nouvelle, Grain d’Envie and Petit Béret). But, if we listen to **Xavier Leclerc**, French wine consultant and ex-GDO buyer, the path might be longer to place free alcohol products on top of mind: “For instance, the biggest problem is the organoleptic qualities of these products. Are they good? I personally tasted very few interesting drinks. Actually, for the no-alcohol wines, I think the best alternative seems to be a good… grape juice!.”

Now, Jean-Philippe Perrouty confirms the tasty idea: “In all the studies we made, the taste remains the first motivation to buy a no-low alcohol wine. It’s not the same for a free-alcohol beer. Freshness is the first motivation. But I’m quite optimistic for the no-alcohol market. The offer is obviously clearer. It’s easier to claim that you have no alcohol than having fewer degrees.” Even if the label can mention some residual alcohol, it is obvious that such offers are easier to understand for the consumers. “You can target easily new consumers, not only for religious considerations or healthy reasons, but because habits change – notes Benjamin Loze – With the younger generation, one day they can drink a wine and the day after a no-alcohol one.”

If it’s quite easy to find wines with or without alcohol, where can we find low-alcohol wines?

A lower… market

And here is the big deal for the low-alcohol market. Stuck


Fathi Benni


Xavier Leclerc


Fabien Marchand-Cassagne on the left, Sébastien Thomas on the right


Olivier Mermuys

between into the "real" wines and the free-of-alcohol products, the low-alcohol wines are on the paths of hesitation. They have less alcohol, but they are not totally free of it. Consumers interested by 0% won't go there. Wine lovers won't find their happiness either.
"It's undeniable that everybody is looking for wines with lower degrees – remarks Xavier Leclerc, but if you are watching the beer market, you will see that, actually, the trend is to create new beers with higher degrees. And it's a huge success. So, what does the consumer is really looking for? The problem with the alcohol degrees is the knowledge of consumers. Most of them are watching the degrees on the back label and less seem to be better, but most of them do not understand this information."

So, is there a place for the low market? Beyond the doubts already mentioned, many new operators are very optimistic. Among them, the start-up baptized "Moderato." An unequivocal Italian name already proud of his three products (1 white, 1 rosé and 1 sparkling, all of them at 5°) which will reveal very soon three new bottles of no-alcohol wines (a sparkling first). With 30,000 bottles sold last year and a probable 60,000 for 2022, the French producers aim to the 100,000 bottles on national and export market.
"The alcohol-free beer market has been there for a long time and, now, it's quite easy to find tasty zero-alcohol beers – says **Sébastien Thomas**, one of the two cofounders –. But with Fabien (Marchand-Cassagne) we were wine lovers and it was really uneasy to find no-low alcohol products with some DNA of the wine. We are not winegrowers; we can select as many wines as we want and find the most balanced and fruity wines. We chose to work on an integral bio range of products. We wanted to do it in the more responsible way with lighter bottles or screw caps." For their three types of wines, they are using the low temperature distillation in spinning cone column to retrieve much better all the aromas.
Even with the very low degree of alcohol (5°), these products have been acclaimed by some tasters and by a very influential retail network in France, Cavavin. Of course, the young start-up has been very proud to be chosen by such a master network (more than 150 franchise shops in France but also in Africa and UK). "Actually, we sell our bottles mostly via three channels, our own e-business website (with a 20% recurrence rate), gourmet retails and now we've built a solid partnership with Cavavin, – adds Thomas – one the biggest wine retailer in France. Their franchises are very open-minded and it's very easy to meet them and explain our products." Of course, in this ocean where there are so few ships, the choice of this very well implanted wine retails is like a compass. "The French market is probably the most difficult for the wine's innovations – explains the co-founder of Moderato – But we actually receive a lot of positive signs. A lot of French journalists begin to watch this new market with a different look!"
And the channel of the wine and fine gourmet retails has been deliberately chosen: "We're convinced that we need prescribers. Our products need to be explained. We fear to not be very well identified if we sell our products in supermarkets and we really do believe in partnerships and commitments," concludes Sébastien Thomas.

Early adopters, the new hope

Olivier Mermuys, general director of Cavavin, confirms: "For a long time, we wanted to have such a low-alcohol range in our retail stores, but we didn't have any reference because we had doubts on the quality. Very often, sugar levels were very high, for example now, with Moderato, we have at least some good products, three low-alcohol references and a no-alcohol very soon."
What is incredible is the response of the franchises: "More than 100 stores have referenced Moderato products – continues Mermuys – Obviously, it's the best start for a new product in our network. It has been made in less than a month! Usually, we need at least 6 months for such a reference rate."
After a tasting, Cavavin also decided the reality on the ground with some testing stores. The consumers validated this choice. "The taste is there. We are not questioning ourselves if it's a wine or not. And, in my opinion, taste will be the key for the low alcohol wines" explains the general director of Cavavin.
With a lot of experience, wine sellers of Cavavin chose to place

the Moderato range very close to hard seltzers: "It's typically a product for the early adopter consumers" adds Mermuys, who -- corroborating most of the things already said -- is sure that the retail market is the one to be targeted by no-low wines. "The added value of a wine merchant like us is the ability to taste the product. When you taste Moderato, nobody notices that it's a de-alcoholized wine. On a supermarket range, – said Mermuys – this kind of product is typically the one that will take the dust. This product has to be argued, explained first."
These optimistic notes shouldn't make us forget that "the French market is quite late in comparison with many others like USA, UK or Canada, even Europe if we compare it to Germany" reminds us Frédéric Chouquet-Stringer, adding: "In Germany, the alcohol-free beer market represents 10%, in France it's only 3%." So, clearly, even if things are changing, the French market won't be the next Eldorado for the no-low wines.
And what could be the prices for such products? Moderato is situated between 9.90 (white and rosé) and 11.90 euros (sparkling) and the next no-alcohol sparkling will be sold at 10.90 euros. Frédéric Chouquet-Stringer thinks that "in the future, we will have two different markets, one for the lower priced products with bottle prices between 4 and 7 euros and optimized costs, and another for premium products between 10 and 20 euros. France is still on the first side. Germany, the USA and the Canada are already focusing on the second one. So, we need more great winemakers to invest in this field."
And that is a conclusion everybody shares. The future of the no-low wines will depend on the new producers. "We don't want to stay alone in this market. We need to be more" claimed Moderato founder. Everybody is waiting for the good timing.

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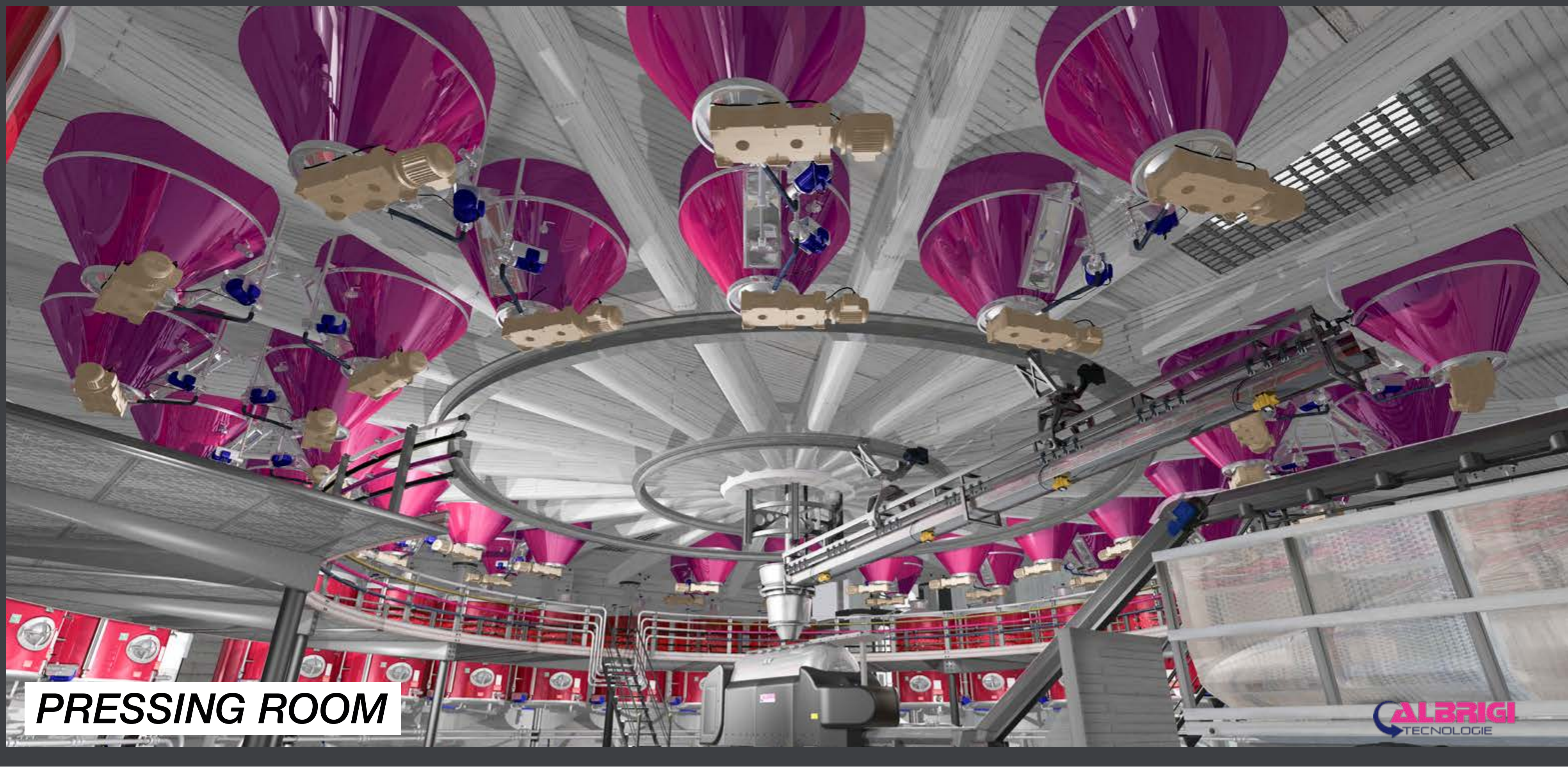


PRESSING ROOM

SCANDINAVIA IS AT THE FOREFRONT OF THE "NO-LOW" AND "SOBER CURIOSITY" MOVEMENTS, WITH DIFFERENCES AMONG THE VARIOUS COUNTRIES

The Scandinavians Drink Like Vikings. Or Maybe Not?

By **ÅSA JOHANSSON**

The trend of low or no alcohol beverages is gaining ground in the Scandinavian countries. We asked the trade for more details about this growing segment and we found out that there are some differences, for example between Denmark on one side and Norway and Sweden on the other. Youths are the driver for change, while producers bet on innovative packaging

Is it still true that Scandinavians drink like Vikings? There is still a stronger spirit culture than in Mediterranean countries, that is for sure, but at the same time, Scandinavia is also at the forefront of the "no-low" and "sober curiosity" movements.

"People are more focused on health issues than in the past, and at the same time, the no-low alcohol products are of much higher quality today compared to before," says **Davide Talotti**, sommelier, and salesperson for Oenoforos, the second largest wine importer in Sweden. Oenoforos works with different non-alcoholic wines and local cider and beer producers that make non-alcoholic versions of products that are very popular, both among private customers and restaurants. "There are also some nice non-alcoholic craft beers. This trend started in Denmark and is now growing in Sweden," says Talotti.

Attention to health issues and social responsibility influence young generations

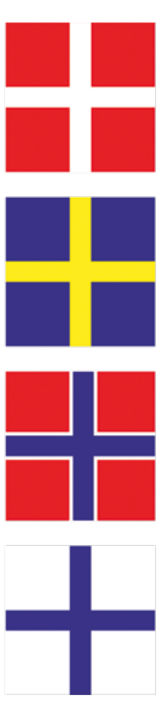
The younger generations drive the trend, according to the people interviewed. They care about a healthier lifestyle, meet more online and go out less compared to the past.

"The category between 20- and 30-years old care about their health, and eat lighter food that is more vegetarian-based, they have a different lifestyle and the no-low alcoholic beverages fit in perfectly," says Swedish wine writer **Sofia Ander**.

Today in Scandinavia it is not uncommon to party with an alcohol-free drink, kombucha or a glass of sparkling wine without alcohol. Currently, non-alcoholic beverages are taking up a significant amount of space in bars and on the shelves of the state monopolies in Norway and Sweden.

"I remembered ten years ago, there were more or less two non-alcoholic products at the state monopoly, Vinmonopolet, while today there are over 130," says Norwegian wine writer **Egil Aasheim**. He says that in Norway, the non-drinking community is still strong, not only for health reasons.

"The older generations see alcohol as a social problem that creates violence and crime; therefore, they do not drink. For them, it is less of a health issue and more of social responsibility," says Egil Aasheim, adding: "In Norway, the distances are big and very often you have to drive to a dinner or a party and then you do not drink alcohol, that is a no-no."



The market between double-digit growth and consumptions change

At Systembolaget, the Swedish state monopoly, there are around 130 products without alcohol. Non-alcoholic beverages were the product category that showed the most significant growth in 2019 for Systembolaget. Wine, cider, and beer are best sellers, and sales have more than quadrupled between 2009 and 2019, according to Systembolaget's sales statistics.

In 2021, in Norway, non-alcoholic beverages increased by 21% compared to a year before. The sparkling non-alcoholic wines are the best sellers, but red wine without alcohol increased by 14% in 2021 and the white non-alcoholic version grew by 10% compared to a year earlier. One could also argue whether the state monopolies should sell this category of product, since the no-low alcohol beverages also can be sold in supermarkets, while products with more than 2,25% abv cannot.

"During the pandemic, we saw a boom in sales of premium traditional wines, since people did not go out. Today it is the opposite. People spend less on luxury goods due to inflation and increased energy prices," says Davide Talotti. He means that this could also increase sales of non-alcoholic beverages that generally cost less due to lower alcohol taxation. He also sees a change in people's behaviour at restaurants after the pandemic: "There is a lack of waiters and sommeliers after the pandemic, and the persons on the floor have less knowledge about important wines and therefore influence less the choice of their guests compared to before the pandemic."

In fact, according to Visita, the Swedish hospitality trade organization, 50.000 workers are missing in the Swedish hospitality industry after the pandemic.

In Norway, the most expensive non-alcoholic white wine costs 65 NRK, while the least costly traditional white wine 95 NRK. The main part of the no-low products at the Norwegian and Swedish monopolies are locally produced.

"I think this also matters. In Sweden, people do their best to be as sustainable as possible and buying locally-produced wines is an added value," says Sofia Ander.

The situation is different in Denmark, according to wine writer **Anders Halskov Jensen**: "I see a trend of no-low alcohol beverages – says Halskov Jensen – but it is mostly beer, spirits, and cocktails. In terms of wine, it hasn't hit yet. The supermarkets have a few no-alcohol wines, the same labels for ten years, and none are really good."

Anders Halskov Jensen sees a slight trend of serious wine importers working on increasing the no-low wine segment with higher quality products in Denmark.

"In restaurants, it is only the higher-end ones that have a quality non-alcoholic alternative, but again, it is mostly cocktails, craft beer and kombucha, for example – never wine," Halskov Jensen says. He explains that the no-alcohol beer trend is strong in Denmark: "I just reviewed 30 non-alcoholic beers, and the quality is high. People are willing to pay the same price for a non-alcoholic beer compared to a traditional one." He also noticed a change of preference regarding flavour among the younger consumers: "They are used to drinking sweet things, and traditional wine to many of them is too acidic and sour."

No-Low in Sweden and Norway before and after the pandemic

In Sweden, restaurants have more and more alternatives of no-low alcoholic beverages, but there is still potential for growth, especially regarding the wine category.

"I see few, low alcoholic wines listed in Swedish restaurants, and this is a segment that could be developed much more. Most no-low alcoholic wines are sold through the monopoly, and they push more for this category and offer many alternatives," says Sofia Ander.

Niklas Löfgren is the chief sommelier for Stureplansgruppen, one of Sweden´s biggest restaurant groups. He says that good non-alcoholic alternatives have been on the market for a while: "The big difference in recent years is that the guests' knowledge has increased significantly, and you are willing to pay more for good products and show greater interest in new things. Alcohol-free is no longer a substitute for alcoholic beverages, but look and taste can be experienced in many ways, making the category much more interesting. There is rarely a demand for non-alcoholic wines, but instead, cocktails, juices and tea have become the main preference."

In Norway, restaurants could stay open during the pandemic, but in some periods, they could not sell any alcohol. Instead, they offered non-alcoholic beverages, which helped change the perception of this category.

"This meant that high-end restaurants put together non-alcoholic packages to match with food. This opened the eyes of many customers that otherwise would not have tried them, says **Ann Kristin H. Bakkeng**, sales and category manager at the Norwegian state monopoly, Vinmonopolet.

The Norwegian wine importer Solera thinks the pandemic has affected the sales of no-low alcohol products. "The pandemic in Norway has affected all sales at Vinmonopolet, with unusually high sales in 2020 and 2021. In percentage terms, alcohol-free sales have increased more than sales of alcoholic beverages. It seems that the pandemic may have influenced sales," says **Stina Kildedal-Johannessen**, communication manager at wine importer Solera.

Ann Kristin H. Bakkeng thinks that the no-low alcoholic segment will continue to grow: "The most popular non-alcoholic wine is the sparkling version. The still non-alcoholic wines are often sweet, this to create a mouth feel and texture that is like a traditional wine, but many customers think that the sweetness makes it difficult to combine these wines with food."

The importance of packaging

Almost all the people interviewed believe that customers accept more modern and different packaging for no-low alcohol products compared to traditional ones.

"We have started to sell non-alcoholic sparkling wine in a 25 cl can that is selling well, for example" says Ann Kristin.H. Bakkeng from Vinmonopolet.

Stina Kildedal-Johannessen, communication manager at wine importer Solera, confirms: "Purchases of beverages in modern packaging increase more for non-alcoholic beverages than beverages with alcohol."


Davide Talotti


Sofia Ander


Egil Aasheim


Anders Halskov Jensen


Niklas Löfgren


Ann Kristin H. Bakkeng


Stina Kildedal-Johannessen

JAPAN, NO-LOW IN THE SPOTLIGHT

Birth Of A New Market (Also Thanks To The Pandemic)

If the lockdown has boosted the consumption of no-alcohol wines, the rebound of the traditional offer has stressed that this new type of wines is chosen primarily by consumers who can't or don't want to drink alcohol, rather than people who normally drink wine. It's still a small market, but with wide prospects of growth, as shown by the debut of two big beer producer. However, a better quality in the offer is needed

By MARI YASUDA


Nobuhide Tani


Noriko Hada


Yu Ando

Market for non-alcoholic wines in Japan is on the move, as major beer brewery companies entered the market for low-alcoholic wines. The market of non-alcoholic beverages in Japan gained steam under the state of emergency due to Covid-19. The market of imported non-alcoholic wines is also on the rise. According to estimates by Shuhan News, a leading wine industry newspaper, the total imported volume of non-alcoholic wines in 2021 was 180,000 cases (9L/case), which accounts for around 0.7% of the total volume of imported wines. The market size is still small; however, the imported volume of almost all importers shows a double-digit growth. For the market of low-alcoholic wines, two major beer brewery companies out of four got into this market in April this year. The future of low-alcoholic wines market is worthy of attention.

Non-alcoholic wines have become a regular item

In Japan, metropolitan areas such as Tokyo and Osaka were under a state of emergency intermittently from April to May 2020 and from January to September 2021. During this periods, restaurants were forced not to sell alcoholic beverages or their operation hours were limited. Currently, restaurants can offer alcoholic beverages without any restrictions. It was estimated that the demand for non-alcoholic beverages would collapse; however, actually that seems not to be the case.
The Hotel New Otani (Tokyo is a representative luxury hotel of Japan and houses Tour d'Argent Tokyo. **Nobuhide Tani**, the executive chief sommelier of the Hotel New Otani (Tokyo) and Japan's best sommelier in 2011, commented: "Compared with the period under the state of emergency, the current demand for non-alcoholic wines has decreased naturally because we can offer wines without any restrictions. However, compared with the period before Covid-19, the demand for non-alcoholic wines is increasing. We also increased the number of items. Before the emergency declaration, we offered only one non-alcoholic sparkling wine; currently we add non-alcoholic still white and red wines to the list. The volume of demand for non-alcoholic wines surely decreased, but they are regularly requested."

Non-alcoholic wines are creating a new market

A recognition is increasing that non-alcoholic wines are products able to develop a new market. Of course, there is a demand from consumers who want to drink wines but should not due to pregnancy or driving; however, currently non-alcoholic wines are penetrating into the market for consumers who cannot drink alcohol for health reasons. Orca International, which imports fine wines from Washington, Oregon and California, released alcohol-removed wines "Clean" with less than 0.5% abv from Washington State in 2021. "We had thought that non-alcoholic wines were for people who drink wines, however, we found that they are for people who cannot drink alcoholic beverages," said **Noriko Hada**, co-managing director in charge of marketing and import at Orca International.
Mr. Tani of the Hotel New Otani (Tokyo) noted: "Non-alcoholic beverages tend to be selected more by the people who cannot drink alcoholic beverages rather than those who usually drink them. They get the information that there are many non-alcoholic beverages which are different from soft drinks, and they try these drinks when they come to the hotels."

Food and non-alcoholic drinks pairing is a business chance

ALT-ALC, the first importer in Japan which handles only non-alcoholic drinks, conducted a restaurant survey this year involving 116 restaurants. The results show that more than 60% of surveyed restaurants select non-alcoholic drinks from the standpoint of a pairing with foods. ALT-ALC mainly handles "wine alternatives" based on grape juice, and various herbs and spices macerated to create a close taste of wine. The current main product of ALT-ALC is "NON" of Australia, of which co-founder and drink maker is Mr. William Wade, ex-chef of the restaurant NOMA. Furthermore, they released a new product this May which is based on imported grape juice, while herbs and spices are macerated in Japan. "Removal of alcohol is a kind of subtraction; on the contrary, alternative drinks are a kind of addition based on grape juice, in which botanical ingredients are macerated; therefore, they can produce an infinite combination and have a wider possibility for the pairing," said **Yu Ando**, CEO of ALT-ALC. Ginza L'écrin is a successful example of food and non-alcoholic drinks pairing. Ginza is Tokyo's best known upmarket dining and shopping area. L'écrin is a long-established, fine French dining there with nearly 50 years of history. **Yuya Kondo**, chief sommelier of L'écrin, is a promising young sommelier, who won the Pommery Sommelier concours in 2019. Mr. Kondo remarked: "When I took over the chief sommelier position in 2020, I wanted the people who cannot drink alcoholic beverages to enjoy L'écrin. For this purpose, I started a pairing of food and non-alcoholic drinks. Honestly speaking, at that time, our restaurant was not fully occupied. After we introduced the pairing with non-alcoholic beverages, people who cannot drink alcoholic beverages or young guests started coming to our restaurant. In the last one or two years, our restaurant has been fully occupied." According to Mr. Kondo, regardless of Covid-19 or not, around 20%-30% of their guests order non-alcoholic beverages. At L'écrin, they do not use already-made non-alcoholic beverages; instead, they make non-alcoholic beverages by themselves. "Freedom of ideas is a charm of non-alcoholic drinks. We want to make a drink which only sommelier can produce. Also, from the viewpoint of sustainability, we wanted to utilize surplus foods from the kitchen for the drinks," said Mr. Kondo.

High-quality non-alcoholic wines are desired

All interviewees this time said that the market of non-alcoholic wines would/should expand from now. What is a challenge for the expansion of this market? "There may be some delicious non-alcoholic wines overseas, but the number of non-alcoholic wines, whose flavour is close to wines and delicious, is very limited among the items currently imported to Japan," said Mr. Tani of the Hotel New Otani (Tokyo). "If higher-quality ones are imported or made in Japan, the demand may increase more. If we can offer a glass of non-alcoholic wine at around 13 €/glass and if its quality is satisfactory, we can recommend it to our guests."
Naoto Uchiike, CEO of the wine shop "La Cave de la Petite Maison," located in a residential area of Tokyo, echoed that it is difficult to find a delicious non-alcoholic wine. Mr.Uchiike is a certified educator of Bourgogne Wine Board BIVB and teaches wines at Académie du Vin; also, he has joined several international concours such as Concours Mondial du Sauvignon Blanc as a judge. "Currently, we offer only one brand of red and white with a retail price of around 11€/bottle. This product is with 0.00% alcohol, organic, and vegan, so I think this can appeal to the consumers. There are few non-alcoholic wines available at the same price level and of a better quality than ordinary ones. Consumers desire a non-alcoholic wine that has an authentic wine taste. I think there are market needs, but it is quite difficult to find the items with convincing quality."
Most of non-alcoholic wines currently available in Japan are sparkling, but there is a request for still wines. "As non-alcoholic wines are often consumed at the timing of toast, there are many sparkling wines. However, I heard some requests from restaurants that they want to have still wines. They want to have an item which they can offer after a glass of sparkling wine," said Mr. Ando of ALT-ALC. Regarding volume, Mr. Ando said, "Compared with alcoholic drinks, the frequency to offer non-alcoholic ones is low; therefore, a small-volume packaging is preferred in order to avoid waste." Mr. Uchiike also supports a small-volume packaging, saying "If a non-alcoholic wine is available in small volume, it can have a potential because consumers can drink it more easily." On the other hand, Mr. Tani of the Hotel New Otani (Tokyo) noted, "The bottle of 750ml can be easily stored in the refrigerator and easy to handle. Currently one bottle is consumed within several days, so we do not see any problem for a bottle of 750ml."
Mr. Tani continued: "For non-alcoholic wines, it is important that its appearance looks like an authentic wine. Guests are delighted if it looks like a Champagne is served when they order a non-alcoholic sparkling wine. A bottle which looks like a wine and resembles the shape of a wine bottle is preferred."

A smooth customs clearance is an issue

Another issue for the expansion of non-alcoholic wines is a smooth customs clearance. According to the Japanese law, alcoholic drink is defined as a product with alcohol at 1.00% abv or more. The products with less than alcohol 1.00% abv are defined as refreshing beverages. Many points are different between the customs clearance of alcoholic beverages and that of refreshing ones, and this makes wine importers confused. Ms. Hada of Orca International commented: "In case of Japan, a refreshing beverage is required to indicate a best-before date. Currently, the shipping from the U.S.A. is much delayed, so we want to place large orders and stock them in the warehouse, but due to the best-before date, it is too risky to place a mass order."
Sterilization is another problem. "In Japan, only sterilization by heat had been authorized for a refreshing beverage. Recently, a sterilization method other than heat was authorized. For example, Dimethyl Dicarbonate (DMDC) was authorized in 2020. However, although the Ministry of Health, Labour and Welfare authorized DMDC, officials at customs have not yet understood it and

insisted that only the sterilization by heat is accepted. It took me quite a long time to explain and persuade officials at customs," said Ms. Hada.

Ms. Ando of ALT-ALC remarked, "There is a difference in the authorization of additives between overseas and Japan. For example, in Japan, potassium sorbate is authorized for wine, but not for refreshing beverages. I have heard of some cases in which importers did not understand this kind of difference in regulation, and they could not pass the customs clearance though the products had arrived in the port." This kind of confusion at customs clearance could be one reason why the imported items of non-alcoholic wines are limited.

Keep an eye on the future of low-alcoholic wine market

For the market of low-alcoholic wines in Japan, especially partially dealcoholized wines, "Skinny" of South Africa (8.5% abv) was imported from 2019 by Wine to Style, and "Sunny with a Chance of Flowers "Sunny" in below" of California (9.0% abv) was imported from 2020 by Orca International. Ms. Hada noted: "The sales of Sunny, retailed at around 16€, tax included, have recorded a constant volume since its release. Restaurants and liquor shops are the main channel."

In 2021, Mercian, a leading winery in Japan, released a domestic low-alcoholic wine "Bon Rouge 6%." And in April of this year, major beer brewery companies entered this market one after the other. Sapporo Breweries Ltd., which imports Yellow Tail of Australia, started the sales of their alcohol-off wines; Yellow Tail Pure Bright (suggested retail price is 7.5€, tax excluded, red 11% abv, white 9.5% abv). Asahi Breweries Ltd., which imports Alpaca of Chile, also started the sales of dealcoholized wines; Santa Helena Alpaca Delight (red&white 5.5% abv). **Fumio Kigure**, Senior Manager, Wine & Spirits, Brand Marketing Department, Marketing Division, Sapporo Breweries Ltd. Observed: "The main sales channel of Yellow Tail Pure Bright are convenient stores and supermarkets. The sales volume for two months since the release in April is estimated to exceed the plan. We decided to introduce these alcohol-off wines because they follow the health-conscious trend accelerated during Covid-19, and this market is expected to expand from now. We had an equal interest in non-alcoholic wine, but our consumer survey in 2021, which targeted men and women from 20 to 69 years old, showed that consumers have little experience of low-alcoholic wines; therefore, we judged that low-alcohol wine market has a potential."

He continued: "As a world trend, the demand for low-alcoholic wines tends to increase more than that for non-alcoholic wines. Low-alcoholic wines meet the request of consumers who want to drink wines lightly when they are doing something else; therefore, we thought the demand for low-alcoholic wines will increase."

What is a challenge for the expansion of low-alcoholic wine? One is maybe a low recognition in the market. "From guests, we got a request for wines or non-alcoholic ones, but we have not yet got the request of low-alcoholic wines. If they want a low-alcoholic beverage, actually they order a cocktail," said Mr. Tani of the Hotel New Otani (Tokyo).

The perception of alcohol level in Japan is different from that of overseas. Ms. Hada of Orca international stated: "Our Sunny contains alcohol of 9% abv. In the U.S.A., 9% abv is seen as healthy, but in Japan, it is still difficult to see that this alcohol level is healthy, because alcohol 9% abv is still higher than beers or RTDs. We have explained to the market that Sunny has zero-sugar, low calories and low alcohol; however, in the actual drinking scenes, Sunny is enjoyed as one of the light-bodied wines and listed in a wine list without any indication of low-alcohol."

Mr. Kigure of Sapporo points out "taste" and "drinking habit of wine" as a challenge. "People drink wine for pleasure; therefore, consumers will not continue to purchase wine if it does not have a certain level of taste. Another important point is that consumers create a habit of drinking wines frequently or on a daily basis rather than consuming them only on special occasions. Only when wines become a daily beverage, non- or low-alcoholic wines will be widely recognized as one choice and their sales will increase."

We should keep an eye on how low-alcoholic market will change after the major breweries' entry this market.

Yuya Kondo

Naoto Uchiike

Fumio Kigure

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

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The goals of NZ Winegrowers' environmental strategy

Climate Change
Being Carbon neutral by 2050

Water
Being a world leader in the efficient use of water and quality protection

Waste
Reaching the goal of zero waste in the landfill by 2050

Soil
Protecting and improving soil health

Crop protection
understanding, reducing and mitigating the impact of parasites and diseases

People
Being a first-choice sector for workers

NEW ZEALAND, The Most Sustainable Vineyard In The World

The birth of the first protocol in the world, in 1995, to certify the sustainability of the vineyard which today covers 96% of the country's wine-growing area. Edwin Massey (General Manager Sustainability New Zealand Winegrowers): "Sustainability is guaranteed from grapes to the glass, but now our goal is to have carbon neutrality for the entire wine industry." The problems, the steps and the plan envisaged over the years up to 2050. The sustainability objectives, measurement and relations with research institutions. Finally, the parallelism with organic certification

By **GIULIO SOMMA**

Sustainability is the biggest challenge that the world of wine is facing, like many other supply chains. There is no single answer, but a multitude of approaches and solutions, which come from every corner of the world. France, for example, by enhancing the work of France Agrimer, Comité National des Interprofessions des Vins à appellation d'origine et à indication géographique (CNIV) and Institut Francais de la Vigne et du Vin - IFV, in 2021 implemented a collective strategy to reduce the effects of Climate Change, of which sustainability is one of the fundamental assets. In Spain there is still no national protocol, but since 2017 the Wineries for Climate Protection programme, including hundreds of companies, is recognized by the FEV (Federación Española del Vino). Italy, on the other hand, approved its national certification for the sustainability of the wine supply chain just over two months ago, after an amalgamation of the many certifications created in recent years. Also important is the work of the Sustainable Wine Roundtable (SWR), a coalition that brings together producers, distributors and winemakers' organizations around the world with a view to developing a global reference standard. And furthermore, the example of the "Sustainable WA Certification Program" in the United States, which has been approved by the Washington wine industry. But the avant-garde, when it comes to sustainability, is the New World, with the examples of Sustainable Winegrowing Australia and, above all, of Sustainable Winegrowing New Zealand.

New Zealand, in fact, introduced the first national protocol in the world, promoted by the New Zealand wine industry back in 1995. A very long journey, undertaken in the awareness that "Even if our lives last a short time, our impact can last longer than a life," as stated in the home page of the New Zealand Winegrowers website, which each year describes the goals achieved by the New Zealand vineyard in the "New Zealand Winegrowers Report," which measures the improvements made by the wine sector in the vineyard and in the cellar.

The 2022 edition was published, not surprisingly, on April 22, on Heart Day, and certified the sustainability of 96% of the New Zealand vineyard. But how did it start, how does it work, and what are the objectives of the "New Zealand Winegrowers Report?" We asked **Edwin Massey**, General Manager Sustainability of the New Zealand Winegrowers.

Edwin Massey

The sustainability standard of New Zealand Winegrowers was created in 1995 and 96% of this New Zealand vineyard is currently certified sustainable: What are the steps needed to reach, in only 27 years, such a results and how much work was needed ahead of it to implement it?

Sustainable Winegrowing New Zealand, the New Zealand industry's sustainability certification programme, began in 1995. The programme is under constant review based on changes in consumer demand and the need to remain relevant for members. In the beginning, the programme only applied to vineyards, but was expanded to include sustainable winery certification in 2002. In 2007 the industry introduced further guidelines to encourage SWNZ membership. This included a sustainability policy that meant that only sustainably certified wines would be eligible for inclusion in marketing events run by the industry body. This policy ensures sustainability from grape to glass and acts as a market access requirement for independent growers to sell their grapes to a SWNZ certified winery. In 2019 NZW commenced a major review of the SWNZ programme, which resulted in a switch towards more quantitative data requirements. Further, following this review the climate change focus area was added to the programme as the NZ industry became much more focused on managing the impacts of climate change. Into the future we are focused on reviewing the IT systems we use to engage with members and also helping them to use SWNZ to meet government-mandated environmental regulatory requirements. The work never stops to protect the people and places that make our famous wines and we are proud to use SWNZ to highlight the commitment our members have to sustainable winegrowing.

Water, Waste, Plant Protection, Soil, People: What are your future goals related to the single pillars on which the sustainability standard is based, and how do you measure the impact of the work in the vineyard and the cellar, based on the different pillars.

Our sustainability goals are set out in the NZ wine industry environment strategy. Each focus area has a set goal supported by key KPIs that seek to measure relevant outcomes. The Environment Strategy Goals can be set out as follows: New Zealand's wine industry will be carbon neutral by 2050. We also want to be a world leader in efficient water use and water quality protection, achieve zero waste to landfill by 2050, protect and improve soil health, understand, reduce and mitigate the impact of pests and diseases be a first-choice industry for those who work in it.

We track progress towards these goals through data gathered through the SWNZ programme. We firmly believe that if you can measure it, you can manage it.

Which are the institutes New Zealand Winegrowers works with to certify constantly the sustainability of the New Zealand vineyard?

The SWNZ programme is guided by high quality science. We worked closely with the Bragato Research Institute (The New Zealand wine industry's own research organisation) and other science service providers to ensure the programme is based on the latest research. As an industry-led programme, independent verification of our members activities is also critical. We work with an independent audit company to ensure each SWNZ certified site is audited once every three years.

Continued on Page 21


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New Zealand Winegrowers Sustainability Report 2022

The report is available online at
www.nzwine.com/en/sustainability/sustainability-report

Continued from Page 19

The next goal is to become Carbon Neutral by 2050: What are the main steps and what is, on this front, the most difficult challenge for New Zealand winemakers?
We understand that the goal to become carbon neutral is a marathon, not a sprint. The most important step on this journey is the first one. You have to get started. Our action plan for climate action is Measure; Reduce, Educate, Communicate. We will continue to refine how we measure the industry production footprint in coming years and really focus on engaging with our members to enable them to make informed choices on how to proceed. The hardest step is the first one - working with members to highlight why taking climate action is important and how taking steps to reduce their emissions will benefit them financially as well as supporting the sustainability of the wine industry.

Considering the Carbon Neutral goal: What initiatives the New Zealand wineries have already taken?
Through the data collected in the SWNZ programme, all SWNZ winery members (and vineyard members) are sent greenhouse gas emissions benchmarking reports that highlight their emissions relative to regional and national averages. This data enables us to get a good understanding of the industry's emissions production footprint. We think this is a world first at an industry level. Some members have gone much further than this: 58% of wineries are implementing specific initiatives to minimise their carbon footprint; 55% of wineries are using lightweight glass bottles as one of their methods of packaging; 34% of wineries have energy efficiency initiatives and 12% of wineries have installed solar energy systems.
A growing portion of our membership is taking the next step in climate leadership by becoming formally certified through verified carbon accounting bodies. Currently 75 vineyards and 15 wineries hold formal carbon management certifications in Aotearoa New Zealand.

Apart from the logo included in the wine labels, how do you communicate the sustainability of New Zealand's wineries to consumers?
Worldwide, sustainability is an overused term that means different things to different people. For the NZ wine industry our sustainability story is weaved around our six focus areas: Climate change, Waste, Water, Plant Protection, Soil and People. To tell that story to consumers we recently released our Sustainability Report 2022: see link *www.nzwine.com/en/sustainability/sustainability-report/*
At its heart, our sustainability story is a differentiator for our premium wine. It highlights while we may be here for a short time, our impacts can last longer than a lifetime. Understanding this means that for our members' sustainability represents growing grapes and producing our world famous wines in such a way that we can do so for generations to come.

Ten percent of New Zealand's companies is also certified organic: Do you think this is a percentage which is set to grow, or sustainability in a future prospect will be the real qualitative response to the needs of both the planet and the consumer?
There are two key reasons why NZ has a growing number of certified organic producers: there is growing demand for premium NZ organic wine in our key markets; Increasing awareness of the potential benefits of organic winemaking on people and the environment. These drivers mean that there is a high likelihood that more wineries will adopt organic practices to pursue certification. SWNZ and organic certification both recognise the dedication of the specific winery to sustainable practices - it's just that different programmes go further in specific areas. There is no "one way" to be sustainable and there needs to be good interoperability between systems. A number of certified organic wineries also produce SWNZ certified wines. SWNZ has equivalence arrangements with certified organic producers so that certified organic grapes can be used in SWNZ certified wines. For New Zealand as a whole, it is critical that we work to promote both SWNZ and organic producers for their own unique contribution to our sustainability story.

AN EXCLUSIVE INTERVIEW WITH
THE TECHNICAL DIRECTOR JIM WHITE

sustainable wine cellars

By GIULIO SOMMA

CLOUDY BAY:
A Story Of Sustainability Between Technology And Research

Being a landmark of sustainability in the New Zealand wine industry since 1998, Cloudy Bay has ambitious goals for the near future: from the elimination of herbicides to the challenge of hydrogen for traction, to 30% of the production cycle in circular economy. An all-round work to reduce the environmental impact in the vineyard and cellar and achieve greater efficiency to combine environmental and economic sustainability

Cloudy Bay is not only one of New Zealand's leading wine companies, considering its blazon and size, but it has also been and continues to be the pioneer of the sustainable turn undertaken by the wine sector in 1995, when the New Zealand wine industry launched the first program towards the certification of the sustainability of its vineyards, the "Sustainable Winegrowing New Zealand" *(see article pages 19 and 21)*. An ambitious and, at the same time, revolutionary goal, which led to important and hardly predictable results thanks to a path widely shared by the country's wineries, which have given themselves a specific purpose: reducing the impact of viticulture on the environment in order to guarantee the next generations the chance to continue producing quality wine. A movement that has found in Cloudy Bay a landmark, with the fundamental support of technology and research. And that will be even more important in order to define new solutions to the challenges yet to come: first of all, the CO_2 reduction in the vineyard, where, to date, there is no real alternative to common diesel tractors. If in the vineyard -- where the protection of biodiversity does important steps year after year -- and where the goal, ambitious but within reach, is to say goodbye to herbicides by 2030, in the cellar the energy sustainability has been a reality for some time. This is also due to a favourable context, because New Zealand, as a countrywide system, guarantees 80% of energy production from renewable sources, and the population, on an area just smaller than Italy, is just over a tenth than that of Italy. Our magazine spoke with the company's technical director, **Jim White**, on how sustainability in Cloudy Bay is implemented in the vineyard and in the cellar.

Let's start from the beginning. When did your commitment for sustainability start?

Cloudy Bay has been involved in the development of a sustainability program in wine production since 1998, playing a leading role in defining the national standard of "Sustainable Winegrowing New Zealand." And, also since 1998, our vines have been certified as sustainable, while we started investing in the cellar some time later.

In these almost 25 years, what are the main innovations in the vineyard and in the cellar? What are the next projects?

Looking first of all at the innovations introduced in the vineyard, we must focus on some areas of work. One of the most important innovations undoubtedly concerns water, which represents one of our greatest worries: irrigation is a fundamental part of New Zealand's viticultural system and is a crucial step in order to produce wines that respect our style, thus overcoming the difficulties dictated by climatic conditions. We therefore keep irrigation under control through a large soil moisture monitoring network, which we have been doing for about 15 years, while we recently switched to a program to monitor the state of water in plants. We use pressure pumps extensively in the vineyard, to avoid water stress on the plants and to use the water resources in our seven vineyards as efficiently as possible. Another fundamental aspect concerns the soil and plant protection products: like Moet Hennessy we have a global ambition, which is to eliminate the use of herbicides in all our vineyards. A very demanding challenge, especially for us here in New Zealand, where the grounds are very different. Currently, herbicide-free management covers about 15% of our total vineyard area, but our ambition is to move, over the next four years, to eliminate the use of herbicides on the entire vineyard area of Cloudy Bay, i.e. 600 hectares.

And how do you plan to manage this step?

One of the advantages we have here in New Zealand is that we have a lot of sheep, which play an important role: we use them in the winter, when the vineyard is at rest, and during the pruning period, letting them graze in our vineyards. They help us to control the growth of plants and weeds in the vineyard, especially in spring, at the time of flowering. Obviously, with sheep grazing in the vineyard, the nutrient cycle is accelerated, especially that of nitrogen, which thanks to the sheep's manure and urine makes the plant grow more quickly. All these aspects are starting to work in synergy, and the results are remarkable.

And in the cellar?

When we move to the cellar, the focus over the past decade has been on energy. We are quite lucky here, because about 80% of electricity is produced from renewable resources: hydroelectricity, mostly, but also geothermal and wind energy, and gradually more and more solar power. This year we also installed a solar panel system capable of generating 450 kW of energy, which for a reasonably-sized cellar like ours is equivalent to one third of the total energy required. Considering the energy issue in a holistic way, we have also done a great job in terms of efficiency, through the installation of energy-saving lighting systems, thermal insulation systems in the cellar to reduce temperature changes in the summer and winter, insulation of the vast majority of our steel tanks to reduce energy loss while working in the cellar, capture of heat from the refrigeration system to heat the water. The next step is to generate our own electricity, and this can only bring benefits upon benefits. These are all things we are thinking about in order to manage the company more efficiently. If I look at the vineyard and the cellar, the greatest potential in perspective comes from hydrogen, a technology that, together with solar, could be used to power our tractors. We know that in Cloudy Bay the vast majority of the Carbon Footprint is linked to the work in the vineyard of our tractors, powered by diesel, a source for which we really struggle to find an alternative. We have seen some electric tractors in development, but they are not yet widespread. Hydrogen could be an interesting alternative energy source, especially if we were able to produce green hydrogen within our company. I think it is an exciting challenge, which still requires some technological progress, but mentally we are ready to imagine how such an innovation could fit into the world production system in the future, not just here.

Jim White

Talking of the Cloudy Bay Carbon Footprint, what impact does the weight of the bottles have and how do you manage the transport chain, one of the most sensitive economic and environmental aspects?

The theme of the weight of the glass of the bottles is particularly important for us, considering that we export more or less 95% of our wine to the world. And for this reason we use the bottles that are produced here, in New Zealand, where most of the energy, as we have seen, is from renewable sources, with a percentage of recycled glass that is between 60% and 75%, a very important aspect. Transportation, of course plays a huge role, and although we're not using the lightest bottles in the world, we're still below average. We make sure to minimize any air travel, the worst thing a wine company can do in terms of carbon footprint. In fact, we make the best use of the transport network, reaching a relatively good Carbon Footprint linked to the transport of our wines. As part of a huge group like Moet Hennessy, we have recorded and reported transportation of all data related to the impact of the different bottles used by Cloudy Bay and the other companies in the group over the last 15 years, so we are able to track, on an annual basis, how many tons of CO_2 per kilometre the transport of our bottles weighs. There has been some variation, for example in 2016, when an earthquake struck New Zealand, putting the entire railway network in difficulty. This event caused an increase in the Carbon Footprint, which decreased again once normality was restored. But there are some things we cannot change, such as the fact that we are at 17,000 kilometres from the United States and Europe, and this is always a significant challenge to keep in mind.

Pictures courtesy of CBV

John Flanagan – Viticulturist & Jim White – Technical Director

Does the commitment to sustainability involve an increase in expenses?

I believe that a production system that has sustainability at its core does not involve higher costs, it can instead cost less. If you can keep all inputs under control, and carefully check what you are doing, you can become more efficient, and by becoming more efficient you can optimize costs. I have worked extensively on sustainability, in Cloudy Bay and even before: if you talk to a farmer, environmental sustainability is important, but economic sustainability is even more key. If we look at sustainability as a whole, with the lens of the economy and the environment, we often find that we are more efficient, from both points of view, by reducing inputs, doing fewer things and doing the important ones better. The important issue becomes understanding perfectly the processes and production systems of your company, to become more efficient, with the double advantage of being not only more sustainable from an environmental point of view, but also more sustainable from an economic point of view. It must be added that there are certainly many aspects that must be evaluated when it comes to costs: for example, I suggested adopting a strategy that eliminates the use of herbicides, but it is a choice that involves a 30% increase in the work-related Carbon Footprint in the vineyard. Using alternatives to herbicides, in fact, involves a greater number of passages between the rows, with our diesel tractors, which produce CO_2. Sometimes it is difficult to choose the best thing for a company: is it better to use herbicides and not have a greater impact of the CO_2 emitted, or to eliminate the use of herbicides and accept an increase in CO_2 emissions? We must try to evaluate all the impacts, and decide the best thing from our point of view.

And in that sense, is it easier to follow the path of sustainability for a large company like yours or for a small winery?

A large company like ours has significant size and resources, which is certainly an advantage, but also a disadvantage if something goes wrong. You can experience many different things on a small scale, without them having such a significant impact. At the same time, changing things at a really important level, such as the elimination of the use of herbicides on 600 hectares, after an experimentation done on 25 hectares like here in Cloudy Bay, involves a significant change, and if we make a mistake we do it in great scale. There are significant challenges both ways. Small companies, on the other hand, have an important advantage, that is a management that is totally involved in all aspects, that works in the field and can see everything that happens in the company day after day. It is an excellent plus, it means that small companies are more agile, and can thus change strategy quickly, while in large companies the change is generally slower, because the decision-making chain involves many more people and more aspects. There are advantages and disadvantages of being a large company as well as being a small company.

Did these innovations affect the profile or style of your wines?

This is an interesting question, because it is an aspect in which we are investing a lot. We don't just spend our energy on the strategy of reducing to zero the use of herbicides or similar things, but we also have a very important program, which measures the impact of everything we do in the vineyard, and therefore how many kilos of grapes a plant produces, the acidity of the grapes, the quantity of nitrogen in the must. We send the wines and grapes of small plots to local research laboratories in order to analyse and taste the results of the experiments we carry out, obviously using different treatments, precisely in order to understand the impact of the changes introduced in the vineyard on the style of the wines we produce. It is something that worries us a lot, especially with regard to Sauvignon Blanc, for which, here in New Zealand, we must always guarantee a great quality. It is the variety that has the greatest possible negative impacts from changes in the work in the vineyard and it concern us a lot.

In terms of biodiversity, which are the actions in the vineyard that go in this direction?

If we think of the management of the Cloudy Bay vineyard, we do not grow anything between the rows, and if we do it it's only rarely, perhaps once every 10 or 15 years, so we usually have a mix of wild herbs of different species that are happy to grow luxuriantly: herbs, legumes, broad-leaved plants, which are well suited to the territory. Gradually, we are leaving these plants to grow freely in height, instead of cutting them, and the advantage is that we save a passage in the vineyard with tractors, but also that we allow them to bloom, providing nectar to the insects, as well as providing higher biomass, which has a positive impact on the soil and on the reconstruction of organic matter, which is the source of carbon-based compounds essential for the richness of soils. We are approaching regenerative agriculture and its principles, and much of what we have been doing for many years is fully part of these principles. I think that, unlike what happens in many countries of Continental Europe, where cultivation between the rows to preserve humidity has become a standard practice for years, here it has never been part of the viticultural system, because we know that we have particularly fragile soils, and if we cultivated them regularly we would risk degrading their structure, leading to soil erosion. It is just a practice, now standardized, that we must not change; but we have started to think at the concept of biodiversity in a different way: we have many vineyards where there is not much space for indigenous vegetation, so we have a program which aims to replant 2% of native vegetation every year, returning the lands that are not intended for viticulture to flora and fauna, with a particular focus on the plants that have always been part of these places, in order to support the life of birds, the species that dominates New Zealand, a country of birds and certainly not of mammals. There is a mix of biodiversity both between the rows and in the area surrounding the vineyard, where we try to reconstruct the native vegetation.

To defend the vineyard from pathogens, what are the practices adopted in the vineyard?

The pathogen we have to deal with most often is powdery mildew: we have a climatic trend that involves temperatures that are constantly growing during the vegetative period, and this involves a very strong powdery mildew pressure between the beginning of November and the harvest. At the centre of the fight against powdery mildew, in Cloudy Bay, there is sulphur, which is part of New Zealand's sustainable viticulture program: we add it to every powdery mildew treatment we give to our vineyards. If we use systemic products, we still have to add sulphur. Today we rely on the use of 3-4 systemic treatments against powdery mildew during the vegetative period. Obviously, the management of the green part of the plant and the defoliation of the foliage are the first things we do, the treatments the second, which helps us to manage the disease, because powdery mildew is a significant challenge for the vine, especially during its sexual phase (that of the generation of the gametophyte), when the pressure is greater. In the last 10 years, in particular, it has become a significant challenge for all winemakers in our region, and including in our protocols the use of these systems is currently essential to keep the disease under control. The second threat is botrytis, especially during the harvest period. This year we had a lot of rains in February, and something in March too, which created further problems in terms of botrytis. Which, however, is first of all symptomatic of poor crop management, or the effect of the problems caused by powdery mildew at the beginning of the season, which create damage to the skins and thus accentuate the effects of botrytis. However, botrytis is a threat that we have to deal with every 5-7 years, but as long as the foliage is kept under control and managed well, ensuring the right aeration, moderate yields, the right levels of nitrogen fertilization, not excessive levels of irrigation, botrytis becomes a manageable challenge in the vast majority of cases. Another important aspect is that, unlike Europe, we don't have problems with downy mildew, so we don't have to use copper, which is very good for our soils. We also have very few insects, and it is quite easy to defend ourselves, as well as from birds, particularly greedy for Pinot Noir: it is enough to use nets during the harvest, it takes time, but it is not difficult. And then there are the frosts, which are not a pathogen, it is mother nature, and since we are far south in the spring, even frosts are an important challenge, which we fight with the anti-frost fans.

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CLOUDY BAY

Pictures courtesy of CBV

Cloudy Bay was born in 1985, when making wine in Marlborough was still something pioneering, not to say unimaginable. Its founder, David Hohnen, who was already a producer with Cape Metelle Vineyards in Margereth River, Australia, was convinced that this area had the potential to produce great wines. From then on, Marlborough's growth became impetuous, establishing itself as New Zealand's wine benchmark, and one of the most renowned wine regions in the world. The name – Cloudy Bay – is a tribute to the corps of explorers led by Captain James Cook, who, arriving on these coasts of New Zealand in 1770, was struck by the gloomy sky, and gave the name to the bay on which the company stands. Already with the first vintages on the market, in the second half of the Eighties, Cloudy Bay's Sauvignon Blanc conquered international fame, celebrated by some of the most influential British critics of the time, such as Oz Clarke and George Taber. In 2003 David Hohnen sold the company shares to Veuve Clicquot, and in 2004 Cloudy Bay became part of the luxury multinational LVMH (Louis Vuitton Moët Hennessy).
In 2014, the first investment came from a different place than Marlborough, with the purchase of the vineyards and the cellar at Northburn Station, bringing the vineyard areas currently to a total of 600 hectares. The company owes its fame mainly to Sauvignon Blanc, known, appreciated and shipped all over the world. At the top of the qualitative pyramid is "Te Koko," Sauvignon Blanc aged in barrique, but Cloudy Bay also produces Chardonnay, a classic method sparkling wine (the "Pelorus") and, in Central Otago, Pinot Noir "Te Wahi." Leading the company is Yang Shen, a manager born in China and raised in the luxury sector, within LVMH.

Info: www.cloudybay.co.nz

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In addition to sustainability certification, is Cloudy Bay an organic company?
We have vineyards, 600 km from here, in Central Otago, certified organic, but not in Marlborough, although we obviously have the sustainability certification on 100% of our vineyards, and the vineyards of the growers we work with are also certified, in addition to our cellars. It is all part of the New Zealand system: to export our wines all over the world we must necessarily have the sustainability certification from the national system throughout the supply chain, from the grapes to the cellar. It is one of the positive things of New Zealand, being a cohesive system, very focused, as an industry, on restoring a clean and green image of New Zealand. This is a factor that contributes significantly to the success of New Zealand wines.

When we talk about sustainability, we talk about the environment, the economy, but also about work: what are the policies undertaken by Cloudy Bay in this area?
The job issue has become particularly important in the last five years. New Zealand is experiencing a particular situation, because many workers come from the Pacific islands, such as Fiji, Tonga and Samoa, and work in the wine industry, but also in other industries of the New Zealand agricultural chain. The flows are regulated, in a very strict way, by the Government: all employees must receive a minimum wage, must have housing and health care. It is a national program that guarantees us a very high level of quality in working relationships with employees and a great social balance. It is a system that has existed for 15 years, and is the benchmark in terms of managing workers arriving from foreign countries: people are paid well, generally above the minimum wage, they have a safety net that defends them from bad employers and for us it is a system that works, because we manage to have the necessary manpower within a week. After all, we could not do otherwise: if we look at the Marlborough region, today there are 33,000 hectares of vineyards, in an area where just 25,000 people live, so relying on foreign labour is fundamental for the success of our industry, and the sector perfectly understands the critical issues affecting these workers, which is why we invest time and energy to take care of working relationships in the best possible way.

And in terms of circular economy, what is your approach?
The circular economy is a topic we are starting to get interested in. The question we asked ourselves is: can we imagine that in 10 years a customer from the United Kingdom could go to the Majestic wine shop in London, take an empty bottle and fill it with Cloudy Bay Sauvignon Blanc? It is a new concept for us, when we think of circularity in the wine industry. As an example we can consider grape waste: are we able to use them again in our vineyards and put them back into the value chain instead of considering them just waste? Right now we are working on wastewater, how to reuse it, perhaps for irrigation of vineyards instead than for grass to grow. The next step in terms of circular economy is very interesting, because within Moet Hennessy we have the ambition, by 2032, to ensure that 25%-30% of our production is attributable to the circular economy, even if we are not so sure about what this entails, especially when it comes to a company in New Zealand that sells all over the world.

Which are the processes that have given you more trouble?
We are focused on minimizing waste throughout the process, we have invested in technology to extract as much wine as possible from pressing and to reduce waste from the fermentation and winemaking processes, starting from lees up to the bentonite used for clarification of must. Everything is aimed at minimizing the wine-making waste, which is equal to half the volume of wine produced, and that we reuse or resell to some other wineries. This is an advantage in any case, because otherwise they would end up in water treatment plants, wastewater or landfill. I believe there are interesting opportunities in this field. Some wineries, here in Marlborough, are abandoning the classic pressing model to marry the use of the horizontal centrifugal decanter (for the continuous extraction of the must, ed), able to reduce the losses that occur in the process of pressing. It is a technology that could find interesting spaces, but probably not for super premium and premium products, more than anything else for entry level wines. It allows to reduce energy consumption and increase the extraction of juice per ton of grapes, which means that if we can produce more with less, as an industry we would be able to reduce our Carbon Footprint instantly, because each bottle of wine would have less impact on the environment. There are interesting devices and technologies available to be used in the cellar and that can help us in perspective.

What are the actions that even a small winery can undertake, at zero or almost no cost, in the direction of sustainability?
Things like energy efficiency are within the reach of every company. If we talk about economic and environmental benefits, we must first of all start thinking about the energy we use, and how to maximize its use in the production process: it is a rather simple success to achieve, starting from easy actions, such as changing the lighting system, moving on to led bulbs. And then, it must be underlined how the wineries manage their refrigeration systems and how they manage the grape harvest, other aspects easy to control, not only to have a significant gain in environmental terms, but also in economic terms. I believe that sometimes it is enough to move away from a production system and change perspective, because too often we think we have all the expertise we need in the cellar, and instead we don't focus enough on the experience of other people, both internal and external to the wine industry, in order to compare different models and understand why we are working in a certain way and if it is actually the best one. This is one of the nice things about the New World, compared to the Old World, where the will to cooperate is lacking. One thing that companies in the New World often do, especially Australia and New Zealand, is to share their ideas, the innovations we apply in the cellar, and that is why technological and production progress has gone so fast in the last 20-25 years, especially in terms of sustainability: we have shared an enormous amount of ideas and knowledge.

How does Cloudy Bay dialogue with the social context that surrounds it, and how does it look to the future?
Sustainability is certainly part of Cloudy Bay's corporate social responsibility, but a broader social involvement project is missing. Our job is to make great wines, and to help others do the same. We are a very young region from the point of view of producing wine. As Cloudy Bay, we only started making wine since 1985, while the first vineyards in Marlborough were planted in 1973. So, unlike many countries of the Old World, we do not have generations and generations of winemakers and centuries of history behind us, but we have the opportunity to look to the Old World and say: "We want to be able to do it too, we want to have a successful wine industry." And therefore in order to continue making wine for centuries we must make sure we make the right decisions today, which guarantees not only the success of the business and the production of great wines today, but also ensures to our cellars, to our vineyards, to our people, to continue making wine for many generations, so they can enjoy the success we have today.

IDEAS AND CONSIDERATIONS FROM THE "WORLD LIVING SOILS FORUM," ORGANIZED BY MOËT HENNESSY

The combination between biodiversity and the health of soil often recurs in the symposium as a primary reference towards a strategy for the defense and regeneration of soils. A Biodiversity that becomes a passepartout to understand other sectors of sustainable development: from water management to reforestation for the regeneration of ecosystems. The "political" importance of an event that suggests the world scientific community to think about the soil and its centrality in order to ensure the future of the planet. Reforestation, investments and management of water resources are the keys to a viticulture and an agriculture capable of winning the challenge of climate change

BIODIVERSITY AS A REGENERATIVE KEY FOR SOILS

Biodiversity was the most recurrent word – obviously after "soil" – in the many reports of the "World Living Soils Forum," organized by the colossus Moët Hennessy – branch of the luxury group LVMH that collects the great names of wine & spirits of France – hosted on June 1-2 in Arles-en-Provence. At the symposium, which had the great "political" result of having attracted the attention of the world scientific community on the topic of the centrality of the soil as a guarantee for the future of our planet, the combination of biodiversity and heath of soil was indicated as the focal point of every strategy of defence and regeneration of soils. Because soil is not an inert mass, composed only of mineral elements, but, on the other hand, it hosts hundreds of plant and animal species that make it alive and, therefore, also sensitive to external aggressions, essentially connected to human activity, especially where conventional agriculture has already done significant damage. And if the issue is still not so central in the public debate, a clear message comes from Arles-en-Provence: Everything concerning the soil, its health and its regeneration, will soon become a fundamental topic of debate, also for the world of wine.

A rich panel of topics and speakers

In order to make an appeal to the scientific community, but also to institutions, producers and media from all over the world, dozens of speeches were organized in the two days of conferences, round tables, masterclasses, attended by more than 100 speakers, starting with Philippe Schaus, president and CEO of Moët Hennessy, and then Ronald Vargas, secretary of the Global Soil Partnership, Land and Water Officer at FAO, Jean-Claude Ruf, scientific director of the OIV, Pau Roca, general director of Oiv, and even Prince Albert of Monaco. Many topics were at the center of the Forum, with specific attention to the role of soils in the wider context of sustainability, inspired by an ancient Chinese proverb, that today has still an extraordinary wisdom: "The soil is the Mother of all creatures. Do not forget the Mother who feeds you."

The soil is, in fact, a fundamental element to keep in mind when it comes to sustainability: It is populated by organisms that play a fundamental role in making fruits nutritious, but are also important for fighting pollution and climate change. Yet, the health of soil has been in constant decline for years, as FAO Director General **Qu Dongyu** said at the end of 2020: "Soils are not only the foundation of agri-food systems and the place where 95 per cent of the food we consume is produced, but their health and biodiversity are also crucial for our project to end hunger and ensure the existence of sustainable agri-food systems." The seed of the World Living Soils Forum, had already been planted by Moet Hennessy at the Vinexpo in Paris in 2020, when he had traced the path of his commitment to sustainability, precisely from a forum dedicated to the soil, which was intended to take the public debate towards a central aspect: climate changes, conservation of soils, water and energy, as well as the sustainability of supply chains, are all factors that contribute to the protection of "living soils." A red line that was renewed in the plenary meeting "Protecting our Soils, an Imperative for the Living," from where a panel of experts addressed a fundamental question: "What are living soils and why are they important in our daily decisions?"

Biodiversity and soil regeneration

Pascal Boivin, Professor of Agronomy and Landscape Architecture and head of the Agronomy chain at the Haute École du Paysage, d'Ingénierie et d'Architecture in Geneva, underlined how "one of the functions of soils is to promote life on Earth. Restoring biodiversity is the result of many other initiatives that need to be undertaken, but it is important to follow the right roadmap." For **Sandrine Sommer**, chief sustainability officer of Moët Hennessy, "soil regeneration is at the heart of our sustainability strategy. We push biodiversity everywhere, both at a macro and micro level, and sharing knowledge is the key for going further and faster." Even FAO, as **Ronald Vargas** pointed out, has put soil protection at the center of its sustainability policies. For example, "with the 'Global Soil Doctors' program, which trains farmers who are provided with educational materials, soil analysis kits and expertise to promote the practices of sustainable management of agricultural activity, in order to become reference points for the various local associations of farmers and in order to work closely with government agencies, research centers, universities and NGOs." **Kris Nichols**, research director of the US start-up engaged in regenerative agriculture "MyLand" and one of the protagonists of the Netflix documentary "Kiss the Ground," spoke of the possibility of regenerating soils, because "despite having reduced the biodiversity of microorganisms, our soils have shown great resistance. By recreating favorable conditions, they can regenerate and grow again, and it is up to us to rebuild them. We have to take care of the soil as we take care of our body. Just as we advise a person to eat a variety of foods, we must ban monoculture and multiply the types of crops in the soil to ensure true biodiversity." As Nichols remnds, our lives depend on photosynthesis and soil, and therefore "our economy is based on carbon, so we need only three things: sun, CO_2 and water, the basic elements of agriculture and farms, and we must use them in the best possible way. And then there is the soil, with its essential micronutrients, and it is time to take care of. It is a pity that we still need to see the devastating effects of Climate Change to realize how urgent and necessary it is to change land management."

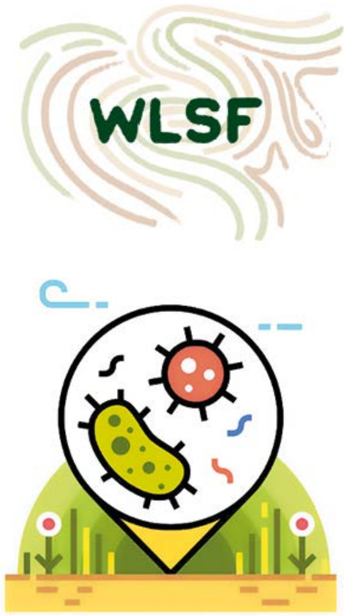
Agroforestry and vineyard

The good health of the soil is a must to ensure the sustainability of ecosystems, and therefore of the human species, and the world of wine must also move in this direction, choosing sustainable agricultural practices, which will not only help to preserve the soil from catastrophic effects of chemistry, but will also have a significant and positive impact on greenhouse gas emissions. Relying on a virtuous ecosystem, regenerating the soil and preserving biodiversity essentially means building a forest ecosystem, capable of hosting a multitude of plant and animal species. "We have not yet reached the turning point, but it is only a matter of time, because the construction of a forest ecosystem is now a necessity," warned **Laurent Boillot**, CEO of Hennessy, from the "Forest Ecosystem" workshop. "We have to look at long-term performances, and to do that we need to go back to using a good dose of common sense, despite the fear, in the short term, of a loss of incomes." **Frédéric Dufour**, president of Maison Ruinart, also speaks of "a mixture of fear and excitement, something natural at the beginning of a beautiful story: the forest ecosystem is the system that can contribute decisively to the survival of entire wine territories." A sector, as **Stéphane Hallaire**, founder and president of Reforest'Action added, "particularly antiquated, that has to fight with many preconceptions, but we cannot afford, in the future, to have a desert planted with vines, it would not be sustainable at all. So we have to be brave and try not to forget that the tree is more than a tool, it is a living being that allows us to achieve multiple objectives." The scenery, starting from a region that is a symbol of wine such as Champagne, is already alarming: here, in the last 30 years, temperatures have increased by one degree centigrade, and this has an undoubted impact on the vineyard and therefore on the quality of the grapes. Agroforestry (or agroselviculture), meaning the construction of an agricultural system that involves the combination of trees and shrubs with agricultural cultivation (in this case viticulture) or with the livestock activity of the company, can change the quality of the soils very quickly, and this can be done without hindering the operation of the machinery in the vineyard. Another key point, in order to protect the life of woods and forests, which represent 80% of the world's biodiversity and guarantee better management of water resources, are the ecological corridors, habitats that connect biological populations separated by barriers produced by human activities such as roads, houses and, indeed, agricultural crops: their enormous importance must be constantly measured. Precisely the centrality assumed by the sustainability of production processes, which is above all environmental sustainability, makes the moment convenient for such a revolution, because there is a real political will to act by listening carefully to the needs of the wine industry, and in this phase industrial groups support farmers in the change process, especially financially. Regarding sustainability, transparency in communication to the consumer has become essential, and in this context the origin of the products, in full respect of the ecosystem that hosts the vineyard, is a fundamental point, as well as cooperation and dialogue between researchers, companies and professionals, are the only solution to the challenges of tomorrow.

Economic sustainability of the company

Challenges that, of course, must also be addressed considering the economic sustainability of the company, as has been said in the workshop "Biodiversity & Business Model – How to implement a new model centered on biodiversity?" As **Stephen Cronk**, co-founder of Maison Mirabeau, Trustee of The Regenerative Viticulture Foundation, remembered, "we must all be aware that the question of costs is frightening, but the depletion of our soils will have a much higher cost. At the beginning of our soil regeneration process we had to deal with the skepticism of our neighbors, who today ask us for advice on how to follow our same path." The awareness is that what is invested today in the defense of biodiversity translates into savings tomorrow in terms of vineyard management and quality of production. On which, today, hangs the sword of Damocles of climate change, which "since 2003, in the Champagne area, has led to problematic harvests, so our priority is to fight global warming, focusing strongly on biodiversity," adds Frédéric Dufour, president of Maison Ruinart. It is thanks to biodiversity that the resources the Earth needs are created, and winegrowers must be aware of this. The example of Ruinart, in this case, is explanatory: the Champagne house has experimented with vitiforestation on 40 hectares of land, and practices regenerative agriculture, and in Portugal it has invested in 300 hectares of forest destroyed by the fires suffered by the country in the past years. All this, to ensure the health of the soils, with the awareness that 50% of natural habitats in Europe are in poor conditions, and even if the G7 has called for joint action to support biodiversity, there is no need to wait for a regulatory framework to act, build-

Overview on the activities of the "World Living Soils Forum"



ing new business models based on biodiversity, in the hope that China and the United States, the two most polluting countries in the world, which have not joined the COP-21, will also join the others in this path.

Water management

Among the most interesting and urgent topics discussed at the World Living Soils Forum, there is that of water resources management, at the center of the "Promoting Biodiversity and Managing Water Resources" workshop, with **Gilles Boeuf**, biologist and professor at the Pierre-et-Marie-Curie, **Diana Wall**, biologist and lecturer at the University of Colorado and director of the School of Global Environmental Sustainability, **Hélène Valade**, director of environmental development for the LVMH group, and **Stuart Orr**, head of the WWF Freshwater Practice at the World Wide Fund for Nature. A discussion from which many interesting ideas came out, but also many concerns and some concepts strongly reiterated, starting from an assumption: "Human beings must realize that they are an integral part of biodiversity," as Professor Boeuf said, adding a crucial question: "Who should benefit first from progress: farmers, consumers or nature?" A slippery question, even if in fact everything is balanced in reciprocity: it is the very secret of sustainability, which in the many variations of the agricultural economy (and not only) needs to protect the heritage of biodiversity. "For our perfumes, the concern is not only to have the best flowers, but also those produced in good social and environmental conditions," says Hélène Valade.
And to identify them, "genetic diversity is fundamental," Diana Wall underlines, giving the example of rice: "We studied 600 different species of rice to identify those resistant to a particular disease." In viticulture, the ampelographic history of the varieties we cultivate today follows a similar path, diluted over thousands of years. Thus we arrive at the fundamental role of water, with the "biomes most affected by climate change which are precisely those that depend mostly on fresh water, an increasingly scarce resource. There are some regions of the world, including the United States, where we will have to decide who has the right to water and who does not," explains Stuart Orr. The danger, at worst, is that climate change turns out to be so fast that it does not allow living species – animals and plants – to adapt, causing a sixth mass extinction of species. That, it should be remembered, was caused by men, because if it is true that nature has always created toxic substances, it is equally true that only human beings produce poisons that do not degrade naturally. And it is for this reason, as well as for global warming, that the management and governance of water has become so urgent for the maintenance of biodiversity and the ability of soils to produce food. With an important role for agriculture (and therefore of viticulture), because 70% of the fresh water used by man is used in the irrigation of crops, even if today 60% of the food produced on earth is cultivated by rain-fed crops, which assumes a very complex scenario with drought caused by climate change.

The appeal of Albert II of Monaco

The agro-ecological transition therefore appears to be the only way to not denature the soils and the Earth, but also to defend a production model that risks to be brought to its knees by the pressures of climate change, on one hand, and from the supporters of de-growth, on the other hand. "In recent years we have witnessed the gradual emergency around the climate question of an unprecedented global mobilization, even if still insufficient to reverse the catastrophic spiral of global warming," says Albert II of Monaco. "The real debate today opposes those who believe in our capacity for innovation and progress, those who see salvation only in the suicidal pursuit of business as usual, and those who opt for de-growth, which would actually lead to a triple regression: social, democratic and of civilization. We must not give up on innovating and progressing."

G.S.

KEY THEMES IN THE WORLD OF "SUSTAINABLE" WINE

REGENERATIVE VITICULTURE At The Heart Of The Annual Assembly Of Lien De La Vigne

The speech of Mireia Torres dedicated to regenerative viticulture

By CARLO DE BIASI
Vicepresident Ass. Lien de la Vigne - Vinelink International

In Paris an important update on the studies focused on the improvements needed in the vineyard and the cellar to respond to climatic changes and contribute to the sustainability of wine production

Lien de la Vigne
VINELINK INTERNATIONAL

LIEN DE LA VIGNE VINELINK INTERNATIONAL
Lien de la Vigne – Vinelink international is an independent association that gathers public and private research centres, producers, and inter-professional structures, dedicated to collaboration, exchange and transfer of technological innovation for the wine sector. Conferences, surveys, development of research partnerships and international collaborations among all the figures in the supply chain, are the tools used by the Association, founded in 1992 and based in Paris, to promote the development and diffusion of innovation in the wine sector. Exactly in the year of its 30th anniversary since the foundation, during the General Assembly of OIV -- the International Organization of Vine and Wine -- held in Dijon on 25 October 2021, the Association Lien De La Vigne Vinelink International was recognized in the status of Observer.

The road to make wine production more and more sustainable has been the centre of debates and studies for several years. While on the markets we discuss how to improve the perception of the efforts made by wine producers, the scientific sector explores the best and long-lasting solutions. In that sense, the annual assembly of "Lien de la Vigne" -- which was held in Paris last April -- has been up to the task by assessing as the main theme how viticulture is adapting to climate change. The presentation of President **Peter Hayes** (AU) opened the meeting, stressing how that theme is now key for the future development of the sector.

The new feature of this edition was the presentation of three excellent students, who participated in the Euromaster Vinifera 2021-2023 organized by University of Davis, Yale University, Institut Agro Montpellier and Hochschule Geisenheim University. Michaela Svobodova introduced the audience to her studies on the spread of the Hylestes obsoletus in the Czech Republic; Rodrigo Martinez focused on the conservation of vineyards over 100 years-old in the Ribera del Duero; and Paige Breen analysed climate changes in California.

During the conference, many topics were covered, from the purely viticultural aspects concerning the polyclonal selection (Antonio Graça) to the introduction of new crosses in historical viticulture such as that of Champagne (Sebastien Debuisson) and of new rootstocks suitable for the changing climatic conditions (Eugenio Sartori) and we assessed purely territorial aspects such as the altitude shift of some European viticulturers (Pierre Leclerc and Carlo De Biasi). The works relating to the project that led to the elaboration of the strategies of the French wine sector in the face of climate change (Natalie Ollat) and the new European projects (Aitor Corchero) were also presented. At the end of the day, issues related to the concepts of "eco conception" of the cellars were also addressed (Joel Rochard and Wafa Larkini). Among many innovative concepts, the one presented by Mireia Torres on regenerative viticulture has attracted particular attention. Viticulture in the last twenty years has undergone profound changes, passing in the nineties from a quantity viticulture to a quality one, introducing in the 2000s the first concepts of sustainable viticulture and then today taking a further step forward towards regenerative viticulture.

Mireia Torres of Familia Torres, a Spanish viticulture company which has played a pioneering role in inspiring the wine industry to be more proactive in tackling climate change, believes that a fundamental contribution will be made by the adoption of the model of "regenerative viticulture." Regenerative viticulture is a vineyard management model, based on the carbon cycle, that regenerates the soils, stops erosion, promotes biodiversity, produces healthy foods and mitigates the effects of climate change. In detail, regenerative viticulture is focused on recovering the natural fertility of the soil, nourishing the food chain, increasing organic matter, improving the water cycle and carbon sequestration. The goal is to find a correct balance among organic matter, minerals, and microorganisms in the soil. As the presence of flora and fauna is the indicator of the health of the vineyard, regenerative viticulture is committed to improving biodiversity, replacing

the use of synthetic chemicals with natural ones, and respecting the so-called vineyard's "guests." In soil management, a natural mulch is introduced which preserves soil moisture: the soil stays cooler, and evaporation is reduced. The soil is also protected from erosion by splashes. The turf is grown and then rolled or mowed before competition with the vine begins (April-May). This model of viticulture establishes correct relationships among total and functionally active microbial diversity to crop management parameters, production and the physical- chemical conditions of the soil. Familia Torres' commitment is to convert all its vineyards according to this model within the next 10 years.

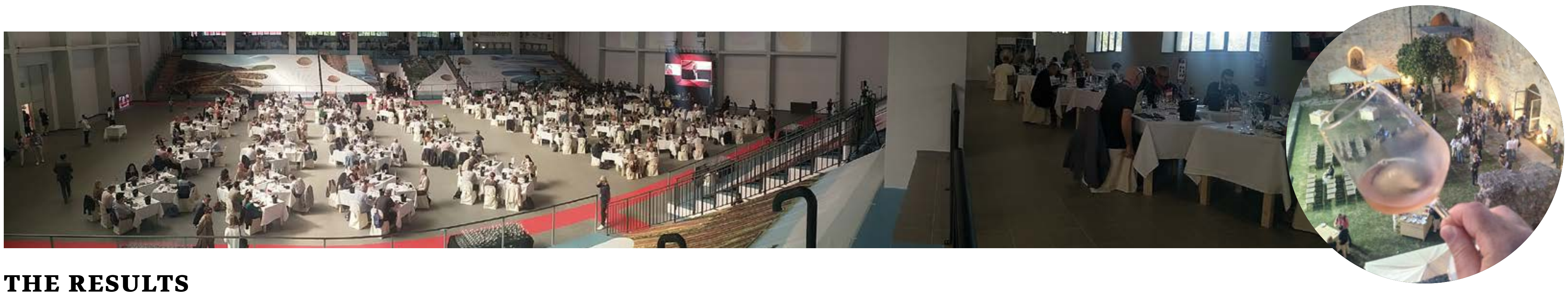
There is a growing awareness surrounding the importance of maintaining and increasing soil organic carbon (SOC, henceforth) stocks in vineyard systems. Increasing SOC positively influences numerous soil properties and has the added advantage of removing atmospheric CO_2, thereby helping to mitigate the effects of climate change. Cover crops have long been used to influence soil properties in vineyard mid-rows, including increasing SOC content. Few studies, however, have quantified cover crop influence on SOC stocks and composition in the under-vine area, owing to a general reluctance to adopt under-vine cover crop management. One recent research aims to quantify SOC stocks and dissolved organic carbon (DOC) in soils from four treatments of under-vine management practice. We found that cover crop-managed soil under-vine sequesters up to 23% more soil organic carbon (SOC) as the traditional, herbicide practice over a five-year period of growth. Microbial activity increased by more than double in cover crop soils, owing to an increase in DOC and that there is evidence for more resistant C in cover crop soils. These results suggest that cover crop management under-vine is a viable solution to increase SOC stocks within vineyard systems. Taken together, the results of this study indicate that a shift from bare earth to cover crops in the under-vine region has the potential to sequester carbon in vineyard soils.

Regenerative viticulture is about restoring the land, unlike more conventional approaches, which deplete soils, and sustainable viticulture, which has a neutral effect. Soil is key to regenerative viticulture, but there is a lot we don't understand about soil networks. Transitioning to regenerative viticulture inevitably takes time, to get to the point where the ecosystem is stable. But the final result is a resilient vineyard.

A new international group promotes regenerative viticulture in the battle for the climate. A new foundation was launched a few weeks ago to reverse the impacts of climate change in viticulture by regenerating soil ecosystems, encouraging biodiversity and promoting carbon sequestration.

Regenerative Viticulture Foundation (RVF) will help build momentum for regenerative approaches in the wine industry. It wants the foundation to become an online resource – a toolbox of how to do things better – that can be shared widely among wine producers.

THE REGENERATIVE VITICULTURE FOUNDATION



THE RESULTS OF THE MOST IMPORTANT AND MUCH-AWAITED SESSION DEDICATED TO WHITE AND RED WINES

Looking At THE FUTURE OF WINE At The CONCOURS MONDIAL DE BRUXELLES

By **FABIO CIARLA**

Concours Mondial BRUXELLES
The United Nations of Fine Wines

Moldova and China are two of the surprises of the last edition of the Belgian competition, held in May in Italy, where over 7,300 wines coming from 40 different countries competed and were examined by over 300 judges of 45 nationalities. The analysis of the value of the wines in the competition is also of great interest, with those able to earn the Grand Gold Medal, about the 1% of the samples in the competition, on sale at an ex-cellar price between 12.5 and 35 EUR. The next edition for white and red wines, the 30th, will be held in Croatia, while it's approaching that dedicated to sparkling wines (July 1-3, Portugal) and in September it will be the turn, once again for Italy but in Sicily, for the session dedicated to sweet and fortified wine

For its numbers, for the wide range of territories represented and for the strict respect of parameters that are useful for the modern market, the Concours Mondial de Bruxelles qualifies as one of the most important competitions in order to have an idea of the future of wine at a global level. A clear witness of this is the last session dedicated to white and red wines, the most important of the four sessions scheduled each year (the others are for Sparkling wines, Rosé wines, Sweet and Fortified), held in May in Calabria, in Southern Italy. The record for the number of organic wines that have been awarded a medal, for example, went to China. The best red of the competition, the one with the highest score, does not come from Bordeaux or Montalcino, but from Moldova. The best organic wine, on the other hand, is a Swiss wine, the Cornalin 2018 from Cave Boléro in Valais. Results that go beyond the mere originality of a territory, as perhaps for Peru or Kazakhstan, which were also competing with their own productions, in order to enlarge the spectrum of choices for those who will decide the markets of the future.

The results

On a global level, tradition and above all total numbers still count: this is why the first three places are firmly in the hands of the countries that prevail in terms of overall volumes. First place, once again, for France, which collected 445 medals, followed closely by Spain, which obtained 433 total awards. Italy, which was also the hosting country, finished third with 351 medals, fourth place for Portugal with 296, while in fifth place we find an important surprise, China, which won 141 awards. The Spanish region of Castilla y Leon had good results for whites and red wines, while Bordeaux and Rioja achieved the highest number of awards for red berried productions. For white wines, on the other hand, without considering Languedoc-Roussillon for France, the region that has made a real jump forward is Moravia, the historical production area of the Czech Republic. Italy has seen the awards distributed mainly between Sicily, Tuscany and Puglia, with a good result of Calabria, the region where the final tastings sessions took place. The "individual" awards saw the prevalence among the reds, as mentioned before, of a Moldovan wine, the Negre 2017 by Fautor Winery (from Feteasca Neagra and Rara Neagra grape varieties which was awarded the title of "International Revelation Red Wine") and for the whites the Spanish Mar de Frades Finca Valiñas 2017, a Galician Albariño from Zamora Company (International Revelation White Wine). The best organic wine (International Revelation Organic Wine) was Swiss, while adding up the individual medals Spain prevails, with 17 Golds, half of them Rioja wines. The extraordinary success of Eastern Europe, already noticeable in the session of Rosé wines (see Wine World Magazine of 4 April 2022), is confirmed also in this occasion, with 12 countries awarded in the area that sees Moldova capable of leading with 53 medals, 43 for the Czech Republic, 38 for Bulgaria and 36 for Romania.

Medals and attention to the market

Why is the Concours Mondial de Bruxelles so sought after? The organizers affirm that receiving a medal can increase the sales up to 30%. It can be imagined that this happens mostly for the most important awards, but certainly in some contexts being able to show a silver medal also means a step forward. This refers for those countries where there is a state monopoly on wine, such as Canada and Scandinavia. Here the selection, only to take part to the competition with other productions, is fierce and it is well known that it is necessary to have at least some international award (and also a national one for the most important countries such as Italy, France or the USA) in order to pass the first selection. The market vocation of the Concours Mondial de Bruxelles - which in fact sees among the expert judges of different categories (journalists, but also oenologists, buyers, restaurateurs, importers) - therefore becomes an important advantage in this perspective. The process of evaluating the competing samples, based - the organizers say - on a model designed by the OIV and the International Oenological Union, rewards annually less than 30% of the wines registered, and contributes to the knowledge of the different productions also in order to provide, once the competition is over, fundamental data of economic nature. It is in fact useful to know that the Gran Gold Medals awarded are positioned in a price range that goes from12.5 to 35 euro ex-cellar, while the Gold Medal are in the 5 - 12.5 euros range.

The importance of the traveling venue

Rosé wines in Valladolid, Spain, in March, white and red wines in May in Calabria, Italy, sparkling wines on July 1-3 in Portugal and, in September, once again in Italy, sweet and fortified wines in the Sicilian city of Marsala. A "world tour" that is repeated every year, with destinations as far away as China, where in 2018 was celebrated the 25th anniversary, and which engages the organization run by the Belgian company Vinopres, led by Baudouin Havaux and Thomas Costenoble, in a tour full of successes. First of all, it offers visibility to the winegrowing regions that are sometimes unknown, or in any case not of the highest range. Just to mention the last two editions - certainly Cigales in Spain, although dedicated to the production of rosé wines for centuries, is not among the best-known areas in the world - similarly Calabria, which was also one of the first territories where wine was produced in Italy and still boasts an incredible ampelographic heritage, but was probably not on the radar of most of the more than 300 judges who visited the region far and wide during the tastings of the competition. For this reason, as it can be understood, the hosting regions have a great interest in holding sessions of the Concours Mondial de Bruxelles, and often invest large capitals so that the event runs at its best and - above all - the appointment becomes a leading force for visibility and growth of the area.

In modern times major events must also be considered under this light: it is often discussed of how much hosting the Olympic games can cost and what are the advantages. On a much smaller scale and with much more caution in making comparisons, the Belgian competition is evidently considered a good investment precisely because of its ability to out the spotlight on the territories where it decides to stop. Italy, and in particular the South, in this sense, aims to make the most with the two sessions of 2022. But for 2023, there is already, and it was announced on the last day in Calabria, a name for the numerically most important session - the one for white wines and red wines - which will take place from 12 to 14 May in Istria, thus putting Croatia's wine production at the center of attention in the 30th edition of the Concours Mondial de Bruxelles.

THE REVELATIONS
(SPECIAL AWARDS, ALL GRAND GOLD MEDALS)

Revelation Red France:
Château Petit Val 2015 – Château Petit Val – Bordeaux

Revelation White France:
Château Prieuré-Les-Tours 2019 – Domaines de la Mette – Bordeaux

Revelation Red Italy:
Mai Dire Mai 2013 – Pasqua Vigneti e Cantine – Veneto

Revelation White Italy:
Fileno Bianco 2021 – Cva Canicattí – Sicilia

Revelation Red Spain:
Castillo de Albai Reserva 2017 – Felix Solis Avantis – Rioja

Revelation Red Portugal:
Animus 2019 – Vicente Faria Vinhos – Porto e Douro

Revelation White from Portugal:
Quinta de Porrais Reserve 2019 – Sociedade Agricola Quinta de Porrais – Porto e Douro

Revelation Bulgaria:
Kabile Syrah 2018 – Villa Yambol – Thrace

Revelation Romania:
Domaine Ceptura Rouge 2014 – Unicom Production – Muntenia

Revelation Czech Republic:
Pinot Noir Reserva 2015 – BV Vinarstvi – Moravie

Revelation Mexico:
Parvada Reserva 2018 – Vinicola Parvada – Parras Valley

Revelation Chile:
Valle Andino Gran Reserva Cabernet Sauvignon 2019 – Viña TerraNoble – Valle de Colchagua

Revelation South Africa:
Family Reserve Cabernet Sauvignon 2018 – Kleine Zalze Wines – Stellenbosch

Revelation China:
Helan Hun Hero Edition Cabernet Sauvignon Reserve 2018 – Ningxia Hejinzun Winery – Ningxia Hui

INTERVIEW WITH LIDIA BASTIANICH

Cooking I TAKE CARE OF OTHERS

The Italo-American chef and Woman of Wine talks about her life, the dinners served to two Popes and the "pasta cacio e pere" for Benigni before the Oscar

by FIAMMETTA MUSSIO

Lidia Bastianich is one of the women and chefs more popular in the United States. For millions of Americans, she represented for decades the Italian cuisine. She has been a tireless flagship of it with her receipts, her popular TV shows, and her restaurants. Behind her success, there's a romantic and adventurous story, which Lidia – with her optimism, her courage and tenacity, has transformed into an example of life, narrating it in her auto-biography named "My American Dream."

Let's start with your grandmother: she was responsible for instilling the culture of food into you. What do you remember of those early years in Pula?

My formative years spent with my maternal grandmother were the base to my connection with food for the rest of my life. My grandmother and grandfather had a vegetable garden and produced most of the food we needed, as well preserved some for the winter. They had a small olive orchard and made olive oil and a little wine yard from which my grandfather would make wine. I was the little helper that would work in the garden with them, help them harvest the vegetables, fruits, potatoes and whenever grandma was cooking, she would send me to collect the fresh herbs for the meal and I would help her with the preparation of the meal.

What was your first thought when your family decided to emigrate to America?

Having left Istria as refugees we ended up in San Saba, a refugee camp in Trieste, for me the possibility of leaving the camp and going to America, even if I was 12, was an exciting dream.

After the annexation of Istria to Yugoslavia, your family was forced to flee to the refugee camp in the Risiera di San Sabba: do you think that this experience is what gave you so much determination in life?

I think that my experiences as a refugee and moving as a young immigrant to the United States thought me to face adversities, being determined and appreciate the value of family love and togetherness.

What has been your greatest satisfaction?

Life has given me many satisfactions, but what I am truly grateful for is a loving family, my children and 5 grandchildren, and the opportunities of education they have and that they are ready to pursue in their lives.

The biggest obstacle you've had to face?

One of the biggest difficulty and disappointment in my life was losing my mother. I lived just about my whole life with my mother, as refugees in the camp, as new immigrants and as young mother and businesswoman, my mother was always by my side, she was my support, my cheer leader and helped me raise my children. There is a big void in my life now that she is gone. She lived to be 100-years-old by my side and I am grateful, but I still miss her very much

Who has inspired you professionally?

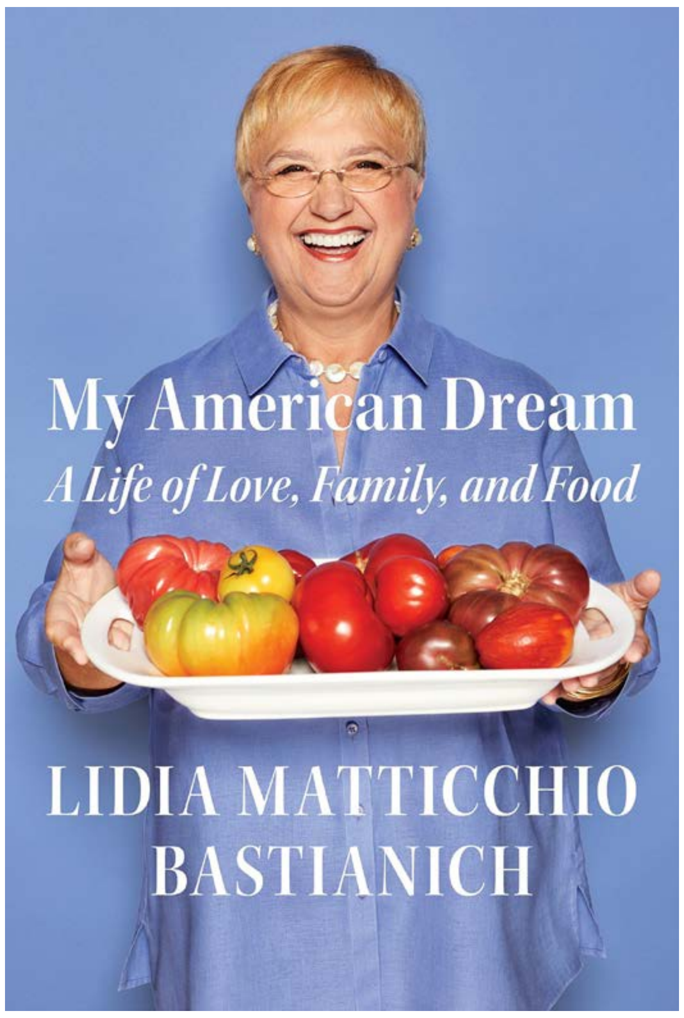
There were many people, situations and opportunities that inspired me in my professional life. My maternal grandmother gave me the base to understand, respect and appreciate food and whence it comes from. The lack of food during my camp stay and immigration period made me understand how precious and needed food is. On my many returns to Italy during my career there were many chefs that shaped my cooking. In Italy some of my friends and mentors: Lidia Alciati, Pierangelo Cornaro, Gualtiero Marchesi, Pietro Zito, Nadia Santini and others. In the US, as far as my TV career, Julia Child was very instrumental and as well became a good friend.

A meeting that has been fundamental?

During my career I met many extra special persons, from presidents to actors and writers, but meeting and cooking for two Popes -- Ratzinger and Bergoglio -- was an extraordinary experience, in a way, affirming my God-given gift and passion for cooking and nurturing people.

The biggest disappointment?

My biggest decision and disappointment was when Covid hit the US and we had to close all of our restaurants. My son Joseph and daughter Tanya Manuali have reopened most of them and are now running them, but for me after 50 years of running restaurants it was a sad period.



Is there a particular event in your career that you will never forget?

There were many unforgettable events in my 50 years of career as a chef, but the one I still chuckle when I recall it is the evening before flying to LA for the Oscars, when Nicoletta Braschi and Roberto Benigni came to dinner at Felidia. He had a plate of "cacio e pere" stuffed pasta and loved it. When he won the Oscar, I saw him jump on the chair at the Awards. I screamed for joy, for it was my pasta that gave him the energy to jump on that chair.

You have cooked for two Popes: can you tell us something that you've never told anyone before, not even in your latest book?

More or less, I shared a lot in my book, but a funny event which I might not have told, happened at the last State dinner by George Bush in 2009, when Berlusconi was invited to the dinner and so was I. At the opening of the dinner, President Bush made a little speech in welcoming his guest Berlusconi, then Berlusconi got up to make his thank you speech and as he grabbed a hold of the podium with the mike, the pedestal of the podium collapsed, but unphased Berlusconi kept on holding the platform of the pedestal with the microphone and continued his speech until the very end, when he nonchalantly handed the platform with the mike to the waiter.

Your daughter Tanya is your right hand: does she have the same kind of character as Joe? What is it like working with her?

Tanya is an extraordinary business woman, educated with a PHD from Oxford in art, but has helped me and the family business all these years. Her children are off to school and jobs, and she is now in full partnership with Joseph, her brother, in all of the businesses, creating new ideas and growing the business. It gives me great pleasure and satisfaction to see my children, loving and continuing the business together.

Is there anything you would change if you could live your life over again?

Nothing, I would do exactly the same things.

What have you had to sacrifice for your career?

I had my first child when I was 20 and we opened our first restaurant at 21. I guess, as a young woman, I missed a lot of good times and dancing, which I love.

What is the most important thing you own, and why?

In my kitchen there is my sharp knife, for me it is like a violin for a violinist.

What do you miss about Italy?

I am blessed to have two of the best cultures in this world as mine, Italian and American. I feel very much part of both, but I do miss the glorious fresh produce and fish markets of Italy.

Have you ever thought about coming back?

My roots, which are my children and grandchildren, are planted in the USA, but I regularly return to Italy, we have a Foresteria and the Bastianich Winery, in Cividale del Friuli, and when I am there I am at home.

Your favourite dish?

Linguine alle Vongole

Your favourite wine?

Vespa Bianco Bastianich

What does the future hold for Lidia Bastianich?

My future plans, after 50 years in the kitchen, is to evermore write cookbooks, do television cooking shows and documentaries.

What piece of advice do you have for the Women of Wine for the future, and one for the younger generation?

I congratulate all the women in the Wine and Food industry, the time for women to rein is here, there are many opportunities for women today in our industry. If this is your passion, follow your dream, take the opportunities that come along, your gender is not part of the equation, just make sure you are prepared and well versed for the opportunity.

The next dream to make come true?

I love to travel and cook and nourish some of the children that are hungry around the world.

Lidia Bastianich
@ Jennifer May

illustrations www.vecteezy.com

WORLD IMPORTS
IN THE FIRST QUARTER OF THE YEAR

A SLOW START, But The Worst May Be Yet To Come

Volumes dropped by 0.5% (14 million hectoliters), while values rose to 5.6 billion dollars (+6%). Data from Russia are missing, darkened by the start of the war

WINE OBSERVATORY

By **CARLO FLAMINI** – *UIV Wine Observatory*

The first quarter of the year closed with a substantial stability in terms of world imports: total trade stood at 14 million hectoliters (-0.5%), with a value of 5.6 billion dollars (+6%) *(chart 1)*. It should be pointed out immediately that the Russian data are missing, due to the start of the war in Ukraine, and have therefore been stationary since January. Obviously, it should be emphasized that these data – which include a lot of wine exported from supplier countries in 2021 and only cleared through customs at their final destination this year – not only reflect the effects of the conflict in the heart of Europe, but also the difficulties of wine companies to find supplies of raw materials – difficulties which have gradually worsened during the course of 2022.

As for the volumes, the first quarter was negative, considering that in 2021 – in full pandemic – the same period of the year had closed at -5%: a rebound therefore postponed to a future date, especially in terms of packaged still wines *(chart 2)*, which closed at -1% due to logistical-political-health problems on the Chinese market (-23%) and the stagnation of the German market (-12%). These numbers were counterbalanced by the good performance of the American (+6%) and English markets (+11%), both coming from a negative first quarter of 2021, due to Trump rates and Brexit.

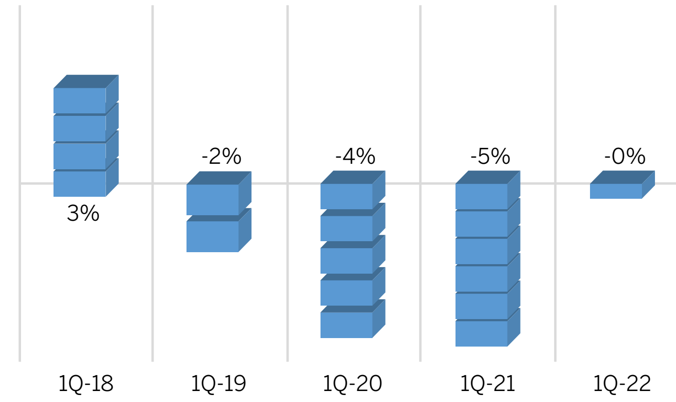
Bulk products are also negative *(chart 3)*, with the German market at -13%, while sparkling wine continues its race *(chart 4)*, with rebounds in the USA (+14% as compared to -12% in 2021), progression on growth in UK (+36% from +19%) and a reduction on the German market (from +24% in 2021 to -1% today).

Main markets

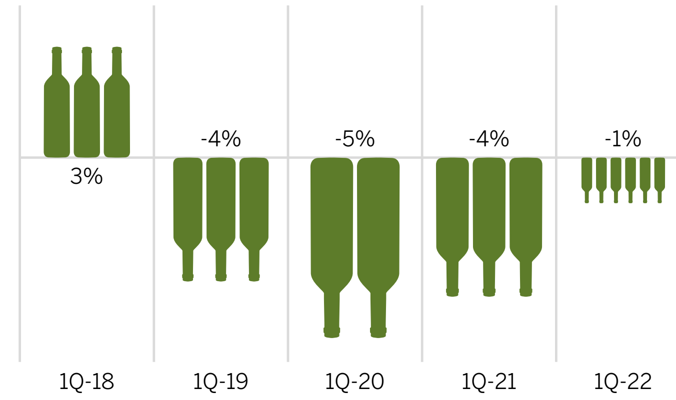
Looking at the main markets, as regards still packaged wine, in the USA *(chart 5)* double-digit progressions for New Zealand (+21% from 0% in 2021) and France, which recovered the -24% of a year ago, while Italy completely lost its rebound, with only +1% this year, just a little better than the first quarter of 2021, when growth was ranging around zero. Good performance for the Australians (+18%), who were forced to redirect wine no longer absorbed by the Chinese market to this and other markets, while supplies from South America remain stable, with surges regarding the bulk wines (+37% for Chileans and +60% for the Argentines). As for sparkling wine *(chart 6)*, the data are very positive, compared with the first quarter of 2021, which was one of the worst in the last ten years: France at +20% and Italy at +12%.

As regards the British market, in the bubbles sector *(chart 7)*, France has repeated the growth seen in 2021 (+15%) while Italy has risen to +53%, as a direct figure. To these should be added the re-exports from Belgium, which substantially doubled. As for still wines, on the other hand *(chart 8)*, we can see a very strong recovery of Australian wines, confirmation of the French rise (+4%) and Italy that came from a -6% in 2021, closing at +1%, therefore with a more than positive result. Spanish wine did not do well,

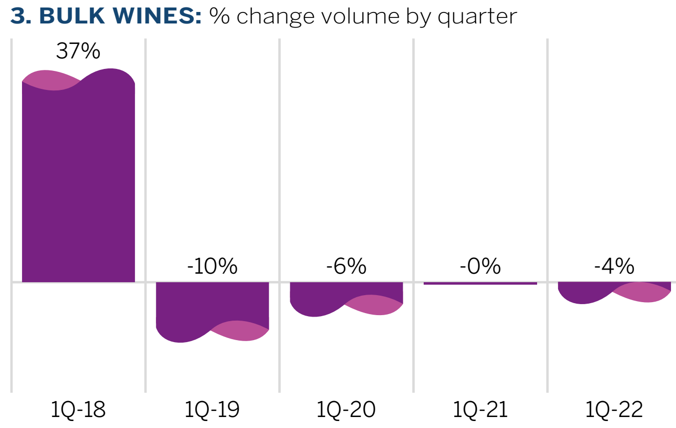
1. WORLD TRADE: % change volume by quarter



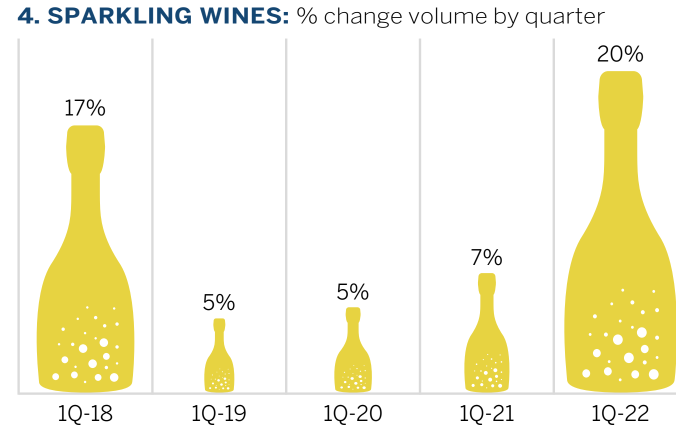
2. BOTTLED STILL WINES: % change volume by quarter



3. BULK WINES: % change volume by quarter



4. SPARKLING WINES: % change volume by quarter



WORLD TRADE: First quarter

SPARKLING W.

	,000 Litres			,000 US$			US$/litre		
	2021	2022	% Chg.	2021	2022	% Chg.	2021	2022	% Chg.
USA	34,200	39,062	14.2	327,315	368,119	12.5	9.57	9.42	-1.5
UK	25,488	34,704	36.2	160,162	268,456	67.6	6.28	7.74	23.1
Japan	7,496	8,570	14.3	143,856	160,603	11.6	19.19	18.74	-2.4
Germany	14,967	14,743	-1.5	105,272	112,693	7.0	7.03	7.64	8.7
Switzerland	4,114	4,280	4.0	44,539	50,522	13.4	10.83	11.81	9.0
Canada	3,260	4,369	34.0	35,268	42,551	20.7	10.82	9.74	-10.0
France	7,389	6,819	-7.7	27,823	26,203	-5.8	3.77	3.84	2.0
China	2,971	1,809	-39.1	26,148	22,446	-14.2	8.80	12.41	41.0
South Korea	1,330	1,888	41.9	15,335	20,935	36.5	11.53	11.09	-3.8
Hong Kong	535	796	48.8	21,098	16,114	-23.6	39.44	20.24	-48.7
Brazil	1,002	1,114	11.2	4,820	5,636	16.9	4.81	5.06	5.2
Total	102,752	118,154	15.0	911,636	1,094,277	20.0	8.87	9.26	4.4

BOTTLED W.

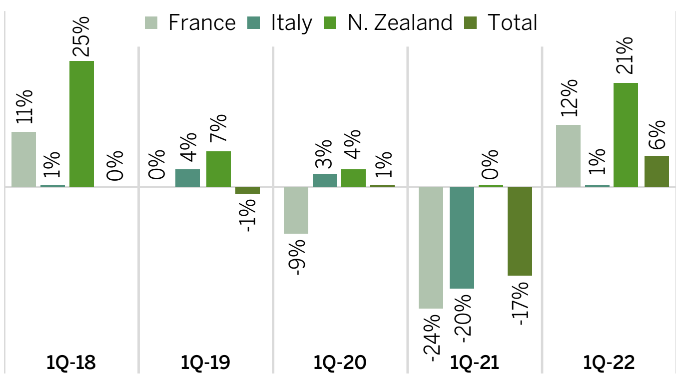
	,000 Litres			,000 US$			US$/litre		
	2021	2022	% Chg.	2021	2022	% Chg.	2021	2022	% Chg.
USA	147,603	157,108	6.4	881,817	1,023,907	16.1	5.97	6.52	9.1
UK	127,194	140,693	10.6	532,539	729,768	37.0	4.19	5.19	23.9
Canada	61,286	64,669	5.5	402,440	435,252	8.2	6.57	6.73	2.5
Germany	125,707	110,943	-11.7	514,675	429,115	-16.6	4.09	3.87	-5.5
China	71,237	54,565	-23.4	377,359	293,962	-22.1	5.30	5.39	1.7
Switzerland	27,240	24,280	-10.9	272,084	267,960	-1.5	9.99	11.04	10.5
Japan	34,652	36,806	6.2	207,272	229,918	10.9	5.98	6.25	4.4
Hong Kong	9,153	7,943	-13.2	304,957	220,947	-27.5	33.32	27.82	-16.5
South Korea	15,473	14,350	-7.3	109,662	115,405	5.2	7.09	8.04	13.5
France	21,676	22,514	3.9	99,127	111,281	12.3	4.57	4.94	8.1
Brazil	31,153	29,849	-4.2	95,242	89,289	-6.3	3.06	2.99	-2.2
Totale	672,374	663,720	-1.3	3,797,174	3,946,804	3.9	5.65	5.95	5.3

BULK W.

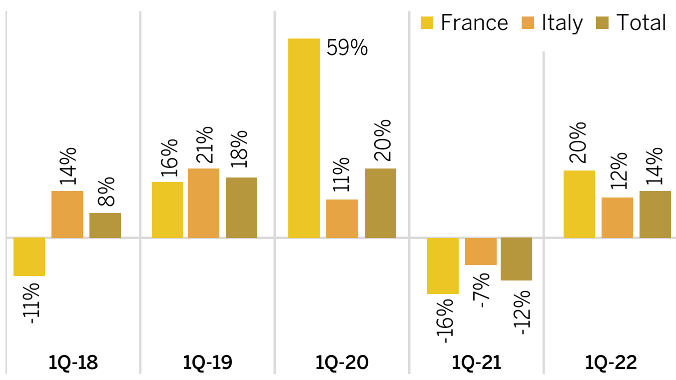
	,000 Litres			,000 US$			US$/litre		
	2020	2021	% Chg.	2020	2021	% Chg.	2020	2021	% Chg.
UK	100,128	107,931	7.8	140,758	156,630	11.3	1.41	1.45	3.2
Germany	182,349	158,352	-13.2	135,438	116,654	-13.9	0.74	0.74	-0.8
USA	111,086	115,612	4.1	127,568	92,185	-27.7	1.15	0.80	-30.6
France	109,378	117,656	7.6	54,471	74,572	36.9	0.50	0.63	27.3
China	31,564	26,548	-15.9	28,047	29,349	4.6	0.89	1.11	24.4
Switzerland	14,076	15,046	6.9	24,956	25,495	2.2	1.77	1.69	-4.4
Canada	31,315	23,840	-23.9	22,009	17,677	-19.7	0.70	0.74	5.5
Japan	8,957	10,426	16.4	9,619	11,214	16.6	1.07	1.08	0.2
Total	588,852	575,411	-2.3	542,865	523,777	-3.5	0.92	0.91	-1.3
Aggregate total	1,363,978	1,357,285	-0.5	5,251,675	5,564,858	6.0	3.85	4.10	6.5

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

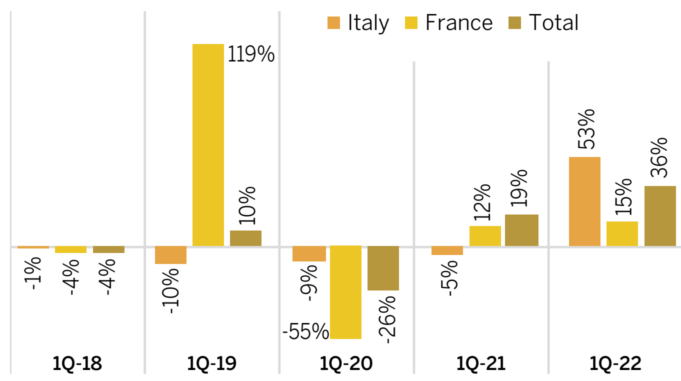
5. US BOTTLED STILL WINES



6. US SPARKLING WINES



7. UK SPARKLING WINES



while the trading platforms of Belgium led this country to be the fourth supplier in terms of value (third in terms of sparkling wines). As for second-tier suppliers, strong progress was made by New Zealand, Australia and South Africa, while Chileans lagged behind.

The German market is in decline in the bulk sector *(chart 9)*, with Spain, coming from +17% a year earlier, dropping to -18%, and Italy climbing back, but remaining on a heavy negative ground (-15%). On the other hand, there is a stagnation in the sparkling wine sector *(chart 10)*, with Italy falling to -6% after having great success in March 2021 (when it was gaining +40%) and France dropping from +18% to +1%. On the still wines side *(chart 11)*, France (from +9% to -19%) and Spain (from +17% to -8%) have fallen, while Italy - which was at zero a year ago - also succeeded in the challenge of losing 12 percentage points.

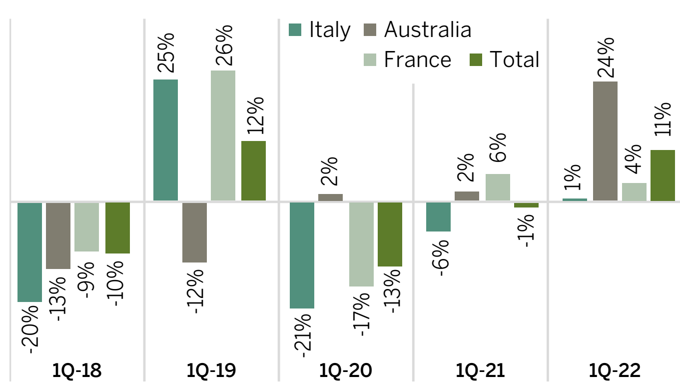
In China *(chart 12)*, after 2021 seemed to show signs of recovery (+12% and +15% respectively for Chile and France), the signs remain strongly negative: the French lost -35%, while Italy confirms a loss of -10%, as in the past year. Australians' exports are now reduced to a minimum, and strong reductions hit all major suppliers, with the exception of wines coming from Georgia (+80%), which gained the sixth position in terms of volume (1.2 million liters).

On the Japanese market, there was a positive start of the year with +6% for still wines and +14% for sparkling wines, due to the strong recovery in Champagne shipments (+32%), while Italians' exports are at a standstill. As for still wines, the best performers are Californian wines (+80%), followed by Chileans (+23%) and Australian (+14%). There has been a good start for France (+6%), while Italians (-19%) and Spaniards (-12%) fell strongly.

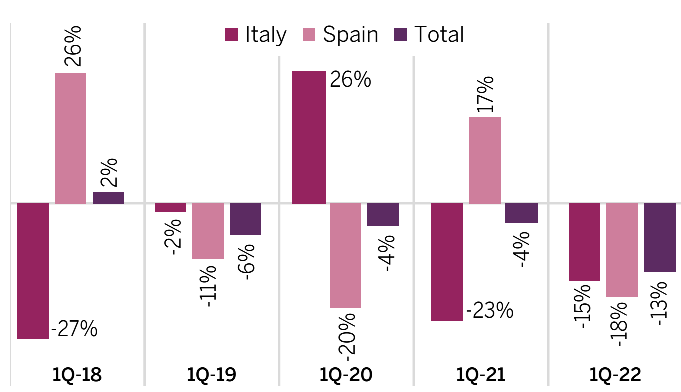
In South Korea the general balance was -7% (however in the same period last year it was +80%), with significant losses for Chile, Spain and Australia. Positive numbers for Italy (+7%) and for French leaders (+4%), while the race for US wines is substantially increasing in terms of value (+18% against a decrease in volume of 5%).

Finally, the Canadian market was positive, with still wines at +6%, with only France negative in the leading trio (USA at +8% and Italy at +14%). There was a resounding leap for New Zealand wines (+33% volume and +40% value), while Australia remains moderately positive (+3%). As for sparkling wines, the leader of growth is Italy, which brings the annual balance to 75% (last year, however, it started with -22%), with minor losses for the Spanish and French wines, which were at +50% in March 2021.

8. UK BOTTLED STILL WINES

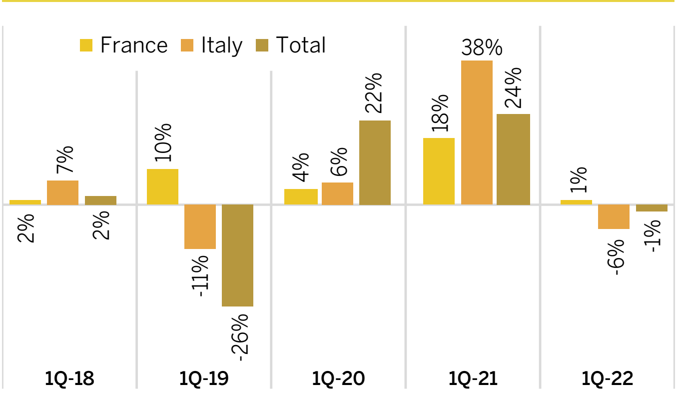


9. GERMANY BULK WINES

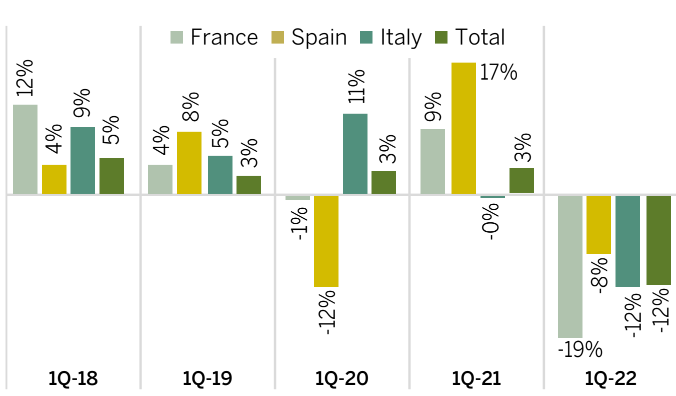


Charts from 5 to 12 include % change volumes by quarter

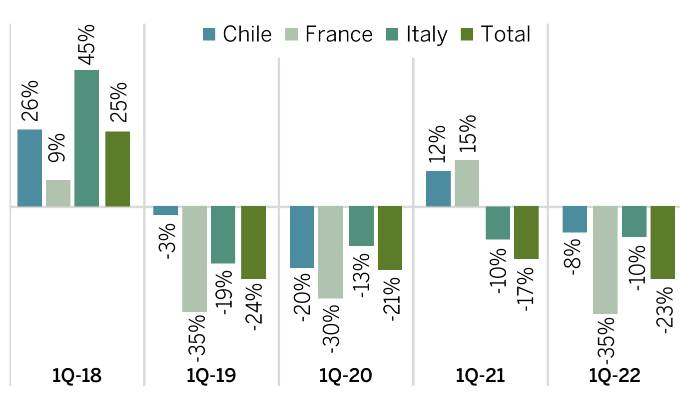
10. GERMANY SPARKLING WINES



11. GERMANY BOTTLED STILL WINES

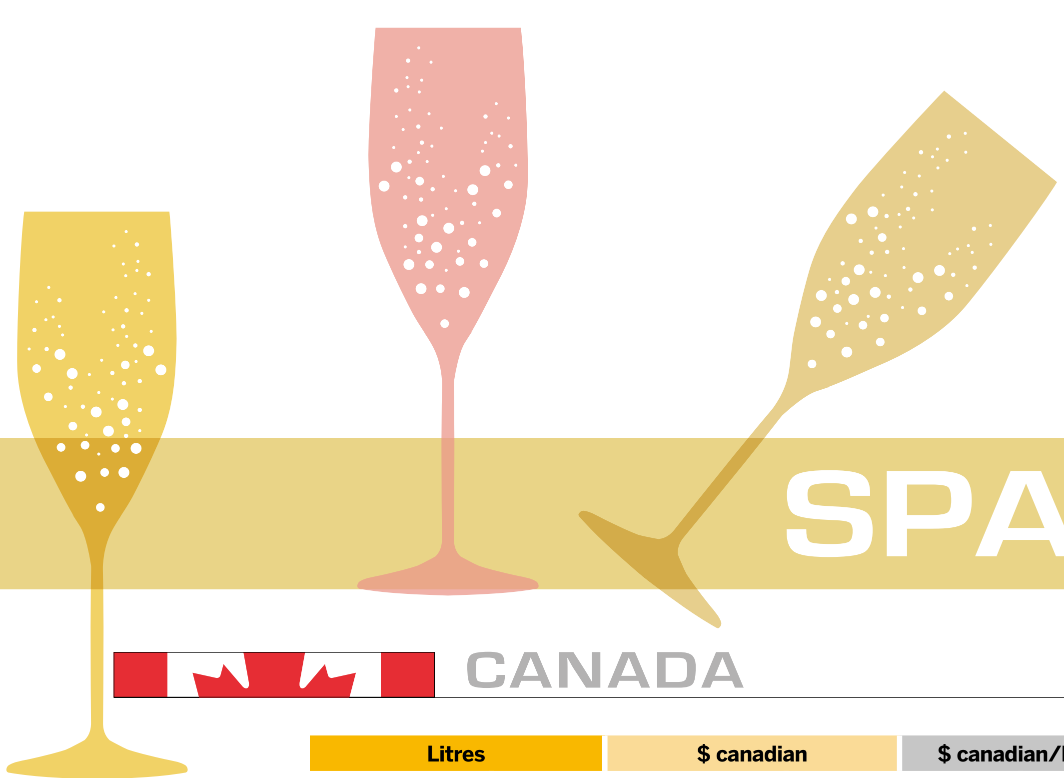


12. CHINA BOTTLED STILL WINES



*In these pages are some of the 2022 data for the main wine import and export countries, analysed and commented by the Wine Observatory of the Unione Italiana Vini (**www.wine-observatory.com**), and published by the Quarterly Report "Wine By Numbers."*

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



SPARKLING WINES

CANADA

	Litres		$ canadian		$ canadian/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	779,662	-3.1	21,754,119	-6.8	27.90	-3.8
Italy	2,304,670	74.8	21,237,392	80.0	9.21	3.0
Spain	430,407	-2.5	3,242,206	-8.4	7.53	-6.0
USA	136,512	0.7	2,433,501	13.0	17.83	12.2
Germany	212,920	3.3	1,547,054	4.4	7.27	1.0
Australia	211,981	14.9	1,372,247	18.9	6.47	3.4
Hungary	116,620	25.9	614,661	25.6	5.27	-0.2
Others	176,348	131.8	1,696,730	139.0	9.62	3.1
Total	4,369,120	34.0	53,897,910	20.6	12.34	-10.0

GERMANY

	,000 litres		,000 Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	5,225	1.2	69,064	26.3	13.22	24.7
Italy	5,615	-6.1	21,678	-5.3	3.86	0.8
Spain	3,689	0.7	8,401	0.3	2.28	-0.4
Austria	84	23.1	593	-28.0	7.08	-41.5
Ukraine	39	7.8	242	5.7	6.24	-1.9
South Africa	11	-19.2	75	-28.6	7.14	-11.6
Others	81	79.6	363	77.9	4.47	-0.9
Total	14,743	-1.5	100,416	15.0	6.81	16.7

SPARKLING WINES

JAPAN

	,000 litres		,000 Yen		Yen/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	3,694	31.6	16,103,900	25.3	4,359.30	-4.9
Spain	2,414	5.6	1,091,767	7.8	452.20	2.1
Italy	1,537	-0.7	905,793	3.5	589.20	4.2
Australia	360	16.6	216,988	10.1	602.14	-5.6
Chile	364	-1.2	183,238	15.9	503.02	17.2
USA	21	47.3	35,459	-4.9	1,727.18	-35.4
South Africa	23	-0.1	20,044	88.0	889.82	88.2
Others	157	10.8	111,629	15.6	712.32	4.4
Total	8,570	14.3	18,668,818	22.5	2,178.34	7.1

UNITED KINGDOM

	,000 litres		,000 Pounds		Pounds/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	4,908	14.6	97,572	75.6	19.88	53.2
Italy	23,005	52.6	74,872	97.7	3.25	29.5
Belgium	2,948	24.2	12,905	35.1	4.38	8.8
Spain	2,819	24.0	7,960	39.7	2.82	12.7
South Africa	261	421.7	1,317	313.4	5.04	-20.8
Germany	308	9.1	1,311	142.7	4.25	122.5
Australia	119	-40.4	508	-26.0	4.25	24.3
USA	52	31.5	428	112.3	8.29	61.4
New Zealand	14	-49.8	85	-47.6	6.05	4.4
Others	270	-69.4	3,075	-44.8	11.38	80.4
Total	34,704	36.2	200,033	72.2	5.76	26.4

SWITZERLAND

	Litres		Francs		Francs/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	1,042,618	11.9	28,704,072	20.0	27.53	7.2
Italy	2,550,808	6.8	14,682,747	16.9	5.76	9.4
Spain	463,390	1.2	1,489,663	-21.1	3.21	-22.0
Germany	152,269	-46.5	781,306	-27.2	5.13	36.2
Austria	26,524	25.6	357,537	37.6	13.48	9.6
Others	43,952	45.2	658,304	11.1	14.98	-23.5
Total	4,279,561	4.0	46,673,629	15.8	10.91	11.3

USA

	,000 litres		,000 $		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	10,492	19.6	217,466	10.3	20.73	-7.8
Italy	23,251	12.2	125,554	16.3	5.40	3.6
Spain	4,266	20.1	19,556	13.0	4.58	-5.9
Germany	182	-58.2	932	-17.7	5.11	96.6
Australia	112	52.1	667	95.0	5.93	28.2
Others	758	16.3	3,944	17.1	5.20	0.7
Total	39,062	14.2	368,119	12.5	9.42	-1.5

BOTTLED WINES

BRAZIL

	Litres		$		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
Chile	13,481,665	0.8	35,827,654	0.5	2.66	-0.3
Argentina	4,966,387	13.1	15,973,060	14.4	3.22	1.1
Portugal	5,210,639	-8.5	14,570,845	-16.3	2.80	-8.6
Italy	2,611,372	-10.6	8,593,085	-20.8	3.29	-11.3
France	1,317,971	-14.0	6,705,513	-13.6	5.09	0.5
Spain	1,177,430	-37.1	3,702,876	-29.4	3.14	12.3
Uruguay	574,744	-20.9	1,911,269	-0.8	3.33	25.4
South Africa	192,614	-31.9	606,234	-28.6	3.15	4.8
USA	79,795	-28.6	505,205	-7.9	6.33	29.0
Australia	121,919	-0.5	358,658	-34.7	2.94	-34.4
Germany	16,892	8.7	100,937	3.6	5.98	-4.7
New Zealand	14,580	2,431.3	98,220	2,575.6	6.74	5.7
Others	82,679	-20.6	335,831	-11.6	4.06	11.4
Total	29,848,687	-4.2	89,289,387	-6.2	2.99	-2.2

CANADA

	Litres		$ Canadian		$ Canadian/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	12,200,572	8.2	134,310,932	10.3	11.01	1.9
Italy	14,669,418	13.8	119,796,302	16.9	8.17	2.7
France	9,951,980	-6.5	96,636,621	-7.0	9.71	-0.6
Australia	5,983,939	3.4	43,374,812	12.2	7.25	8.4
New Zealand	3,352,551	32.8	34,444,882	39.8	10.27	5.3
Spain	4,680,466	-8.3	33,733,165	-13.3	7.21	-5.5
Chile	4,598,957	-0.1	25,717,219	7.0	5.59	7.1
Argentina	3,446,297	23.3	24,474,720	26.6	7.10	2.7
Portugal	2,732,476	2.4	16,774,326	3.8	6.14	1.3
South Africa	1,373,739	22.7	8,077,019	24.7	5.88	1.6
Germany	695,593	8.6	4,720,304	18.6	6.79	9.2
Others	983,121	-19.9	9,255,867	-0.6	9.41	24.1
Total						

CHINA

	Litres		$		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	17,060,664	-35.1	128,511,883	-19.0	7.53	24.8
Chile	14,446,078	-8.5	64,105,768	3.8	4.44	13.4
Italy	5,238,574	-10.1	29,276,741	-17.7	5.59	-8.5
Spain	9,744,966	-4.5	25,649,445	-18.4	2.63	-14.6
USA	785,218	-12.8	10,568,926	77.0	13.46	103.0
New Zealand	449,302	-10.3	5,422,536	-5.5	12.07	5.4
Argentina	1,069,300	-5.6	5,383,449	-16.0	5.03	-11.0
Germany	856,485	0.7	5,097,584	-2.5	5.95	-3.2
Georgia	1,205,773	80.3	4,554,882	113.5	3.78	18.4
Portugal	769,626	-30.1	3,268,711	-33.4	4.25	-4.7
South Africa	785,883	-46.0	3,235,565	-36.6	4.12	17.4
Moldova	792,756	-20.0	1,926,542	-16.5	2.43	4.4
Australia	167,407	-95.9	782,506	-98.2	4.67	-56.2
Others	1,192,599	-18.8	6,177,095	-29.2	5.18	-12.7
Total	54,564,631	-23.4	293,961,633	-22.1	5.39	1.7

GERMANY

	,000 litres		,000 Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
Italy	48,633	-12.2	175,807	-13.0	3.61	-0.9
France	21,446	-18.8	90,199	-11.3	4.21	9.3
Spain	18,552	-7.8	45,163	-16.0	2.43	-8.9
Austria	6,228	-15.1	15,759	-8.2	2.53	8.2
USA	2,879	56.6	13,303	50.7	4.62	-3.8
Portugal	3,503	-15.7	11,388	-6.1	3.25	11.3
South Africa	2,156	-30.9	6,718	-28.6	3.12	3.3
Chile	1,739	19.7	5,549	9.5	3.19	-8.5
Australia	931	83.6	4,765	96.3	5.12	6.9
Greece	1,173	-3.4	2,639	0.4	2.25	3.9
Argentina	421	-31.7	2,194	-25.1	5.21	9.7
New Zealand	233	-25.3	1,610	-9.8	6.91	20.8
Hungary	856	-13.1	1,251	-15.0	1.46	-2.2
Switzerland	48	-12.2	432	-15.8	8.93	-4.1
Turkey	132	275.5	429	243.2	3.25	-8.6
Moldova	125	-33.7	241	-27.6	1.92	9.2
Croatia	43	94.6	196	56.8	4.54	-19.4
Bulgaria	24	65.3	83	62.7	3.49	-1.5
Others	1,821	-5.8	4,641	2.6	2.55	8.9
Total	110,943	-11.7	382,367	-10.4	3.45	1.5

HONG KONG

	,000 litres		,000 HKD		HKD/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	1,914	-14.0	695,976	-38.8	363.64	-28.8
UK	237	-39.4	262,433	-2.8	1105.87	60.4
Australia	2,325	11.3	219,112	7.3	94.24	-3.6
USA	474	-41.9	158,083	15.2	333.34	98.3
Singapore	403	-41.3	57,854	-53.6	143.51	-21.0
Italy	632	39.0	48,519	2.7	76.72	-26.1
Switzerland	5	-20.8	41,985	71.1	7844.73	115.9
China	157	-57.5	41,840	-46.1	267.17	26.7
Germany	147	-11.1	25,630	-7.0	174.48	4.6
Chile	522	37.3	24,178	71.0	46.36	24.5
Spain	387	-3.7	22,352	-23.9	57.73	-20.9
New Zealand	254	-20.6	18,231	-29.0	71.74	-10.6
South Africa	89	16.6	3,943	-4.7	44.34	-18.3
Portugal	18	-14.5	3,171	44.3	174.25	68.9
Argentina	24	183.7	1,448	153.6	59.16	-10.6
Others	354	-52.2	99,692	-58.4	281.98	-12.9
Total	7,943	-13.2	1,724,447	-27.1	217.10	-16.0

BOTTLED WINES

SWITZERLAND

	Litres		Francs		Francs/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	4,927,974	-8.8	88,903,890	4.4	18.04	14.5
Italy	9,955,276	-10.3	84,877,424	-1.4	8.53	10.0
Spain	4,200,800	-6.9	34,416,800	4.3	8.19	12.0
Portugal	1,880,353	-18.7	9,141,049	-9.2	4.86	11.8
Germany	809,780	-18.8	6,917,567	-11.5	8.54	9.0
Austria	742,680	29.0	5,852,111	20.3	7.88	-6.7
USA	476,888	-30.3	5,696,562	-6.2	11.95	34.4
Argentina	387,796	-40.6	2,807,689	-15.7	7.24	41.9
South Africa	170,884	3.2	1,438,902	10.8	8.42	7.3
Chile	265,943	-39.5	1,398,496	-42.7	5.26	-5.3
Australia	164,506	12.3	1,260,025	7.0	7.66	-4.7
New Zealand	56,434	24.0	527,145	45.2	9.34	17.1
Others	240,268	19.2	4,311,781	-5.6	17.95	-20.8
Total	24,279,582	-10.9	247,549,441	0.6	10.20	12.8

UNITED KINGDOM

	,000 litres		,000 Pounds		Pounds/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	27,177	3.7	179,716	52.2	6.61	46.8
Italy	26,569	1.1	71,461	25.4	2.69	24.0
Spain	16,652	-14.9	50,635	17.9	3.04	38.5
Belgium	11,233	365.6	35,901	387.1	3.20	4.6
New Zealand	7,185	34.1	34,290	48.0	4.77	10.4
Chile	10,232	1.3	28,562	5.1	2.79	3.7
Australia	9,057	24.2	26,062	31.4	2.88	5.8
South Africa	6,397	14.5	22,066	59.1	3.45	39.0
Argentina	7,648	19.1	21,864	30.7	2.86	9.8
Germany	5,428	17.0	16,901	56.7	3.11	33.9
Portugal	4,016	2.2	12,779	14.4	3.18	12.0
USA	1,758	-64.5	12,591	-15.4	7.16	138.3
Netherlands	5,204	3573.1	12,236	2844.9	2.35	-19.8
Others	2,137	-50.4	18,703	-18.3	8.75	64.8
Total	140,693	10.6	543,767	40.8	3.86	27.3

JAPAN

	,000 litres		,000 Yen		Yen/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	8,815	6.4	11,136,266	21.3	1,263.38	14.0
Chile	12,694	23.1	4,405,887	37.5	347.10	11.7
USA	2,201	79.8	4,146,091	72.3	1,883.94	-4.1
Italy	5,467	-19.0	3,415,087	-10.4	624.70	10.6
Spain	3,941	-11.6	1,335,080	-4.4	338.74	8.1
Australia	1,527	14.2	796,334	27.8	521.41	11.9
Germany	541	3.5	358,973	41.1	663.33	36.3
New Zealand	246	10.3	271,320	18.2	1,104.00	7.2
South Africa	314	-16.8	185,274	11.4	590.95	33.9
Portugal	365	13.2	184,627	24.6	505.79	10.0
Argentina	217	-42.5	133,400	-30.4	613.59	21.1
Others	479	5.5	357,854	2.1	746.84	-3.2
Total	36,806	6.2	26,726,193	21.7	726.13	14.6

SOUTH KOREA

	,000 litres		,000 $		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	2,362	4.0	30,212	14.0	12.79	9.7
USA	1,693	-5.0	24,404	17.9	14.42	24.1
Italy	2,186	6.5	17,843	9.1	8.16	2.4
Chile	3,771	-12.1	17,505	-12.7	4.64	-0.7
Spain	1,883	-26.5	6,816	-21.1	3.62	7.3
Australia	933	-17.1	6,180	-9.5	6.63	9.2
New Zealand	474	6.5	4,225	9.9	8.92	3.2
Argentina	420	-1.9	2,313	-2.4	5.51	-0.5
Portugal	226	27.8	2,010	21.2	8.89	-5.1
Germany	157	41.5	1,166	78.8	7.45	26.4
South Africa	84	7.8	503	13.8	5.99	5.6
Others	162	6.0	2,228	37.3	13.74	29.5
Total	14,350	-7.3	115,405	5.2	8.04	13.5

USA

	,000 litres		,000 $		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
Italy	51,347	0.7	328,235	-0.1	6.39	-0.8
France	26,671	12.4	284,521	49.3	10.67	32.9
New Zealand	15,685	20.6	114,278	16.5	7.29	-3.3
Australia	19,588	18.1	68,635	25.4	3.50	6.2
Spain	9,261	1.3	56,377	8.5	6.09	7.2
Argentina	10,623	2.0	50,216	-0.7	4.73	-2.6
Chile	8,769	1.1	30,120	4.6	3.43	3.5
Portugal	4,559	-23.2	25,024	-11.3	5.49	15.4
Germany	3,573	16.3	17,065	38.5	4.78	19.1
South Africa	2,182	18.6	11,144	26.4	5.11	6.5
Others	4,850	14.6	38,292	30.6	7.90	14.0
Total	157,108	6.4	1,023,907	16.1	6.52	9.1

BULK WINE

GERMANY

	,000 litres		,000 Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
Italy	43.658	-15,1	27.417	-5,1	0,63	11,8
Spain	50.089	-18,3	20.922	-7,5	0,42	13,2
France	14.049	-21,4	13.968	-6,5	0,99	18,9
Australia	8.816	-0,2	7.888	-2,5	0,89	-2,3
USA	6.870	15,0	7.818	14,1	1,14	-0,7
South Africa	14.485	17,1	7.140	-6,3	0,49	-20,0
Chile	6.891	-24,3	6.114	-1,0	0,89	30,7
New Zealand	1.916	-53,3	4.961	-50,9	2,59	5,1
Austria	2.371	60,6	2.168	102,6	0,91	26,2
Hungary	3.088	27,1	2.087	6,8	0,68	-16,0
Macedonia	4.086	-22,5	1.979	-22,8	0,48	-0,3
Argentina	1.122	15,4	681	18,0	0,61	2,2
Portugal	247	-30,0	213	-13,4	0,86	23,6
Romania	276	-47,6	195	-50,9	0,71	-6,3
Greece	54	-74,6	51	-71,0	0,95	14,2
Others	333	252,7	344	300,0	1,03	13,4
Total	158.352	-13,2	103.946	-7,5	0,66	6,5

UNITED KINGDOM

	,000 litres		,000 Pounds		Pounds/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
Australia	35,661	-1.8	35,798	17.1	1.00	19.2
USA	14,505	4.8	21,802	12.0	1.50	6.9
New Zealand	6,880	-19.1	16,279	-10.2	2.37	11.0
Chile	17,755	19.1	15,202	35.9	0.86	14.1
South Africa	13,180	31.9	8,290	32.3	0.63	0.3
Argentina	6,528	-15.2	7,224	-13.7	1.11	1.8
Italy	4,574	17.1	5,001	40.4	1.09	19.9
Spain	4,824	104.7	2,816	80.3	0.58	-11.9
France	1,230	56.8	1,923	86.5	1.56	19.0
Germany	27	-77.3	39	-68.3	1.46	39.8
Others	2,767	62.1	2,335	26.7	0.84	-21.9
Total	107,931	7.8	116,709	14.3	1.08	6.0

USA

	,000 litres		,000 $		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
New Zealand	8.286	-1,1	26.828	1,4	3,24	2,6
Chile	30.231	36,8	22.820	34,2	0,75	-1,9
Australia	13.212	-5,7	14.682	-1,9	1,11	4,0
South Africa	9.205	757,6	5.869	605,4	0,64	-17,7
Italy	1.955	-21,9	3.461	-25,2	1,77	-4,2
France	952	-85,5	2.370	-94,9	2,49	-65,0
Argentina	2.829	60,2	2.263	3,8	0,80	-35,2
Spain	619	4,5	614	-30,1	0,99	-33,1
Others	48.322	-10,7	13.278	-4,0	0,27	7,4
Total	115.612	4,1	92.185	-27,7	0,80	-30,6

THE PERFORMANCES OF THE TOP EXPORTERS

VOLUMES REMAIN STABLE, WHILE VALUE INCREASES SHARPLY

In the first quarter of 2022, the total value of wine was USD 7.5 billion (+7%). A significant progress for France, Italy and the US, while Spain decreased. Great performances for sparkling wines (+27%), bulk wines in decline on the market

By **CARLO FLAMINI**
Wine Observatory – Unione Italiana Vini

In the first quarter of the year, the main wine producing countries exported just under 20 million hectolitres of product, with a negative variation of 2%. Value, on the other hand, registers a positive trend: USD 7.5 billion, with an increase of 7% compared to the same period of 2021. Shipments from France (+15%), Italy (+10%) and the USA are showing a strong growth (+13%), while rather substantial falls are recorded by New Zealand (-14%, due to the bulk component) and Spain (-11%). Spain is – among the top exporters – also the country with the greatest contraction in volume (-15%). Significant decrease in volume also for Argentina (-20%) and New Zealand (-24%).

Sparkling wine shows a great growth, with the total figure increasing by 27% (1.7 billion USD), and the three top players recording highly positive performances: France at +30%, with Champagne at +33%, Italy at +26%, with Prosecco at +30%, and Spain a bit slower, but still on a positive balance, with +6% for Cava and +4% for the total of sparkling wines.

When looking at details on the main markets, in the US, Champagne obtains an increase in value of 15%, followed by Prosecco with +12%, while the Cavas fall by 3%. The performance of Prosecco in the UK is unexplainable, with an increase in value of 80%, which is echoed by the +37% of Champagne. Spanish sparkling wine is still negative, with a general figure down by 17%, -8% for Cava.

Wines in bottles grew by 4% in value, 5.1 billion of USD, driven by the French performance (+11%, 1.9 billion) and by the Italian one (+6%, 1.3 billion), while Spain (-16%) and South America's shipments have decreased, with Chile at -25% and Argentina at -7%. The US is making a strong progress (+16%), while the Australians are recovering from the impossibility to access the Chinese market by diverting the product mainly to the UK and the US.

The global figure for volumes is negative by 2% (10.2 million hectolitres), a number generated by the scarcity of the French product (harvest 2021) and above all by the poor Spanish performance, down by 24%, compared to March 2021. Italy remains positive (+4%), as well as Australia and South Africa, while New Zealand (-4%) and Argentine (-10%) shipments are in decline.

On the main markets, starting from the United Kingdom, the performances of value registered by France, New Zealand, (+40%), Italy (+18%) and Chile (+23%) are positive, while the balance is negative for Australia (-11%) and Spain (-24%).

In the USA, the top performer is France (+24%), followed by Australia (+7%) and Italy (+4%), while Chile (-10%), New Zealand (-8%) and Spain (-9%) are in decline.

In China, the supplies departing from Australia are close to zero, while the main players bring home performances from moderately positive (Chile and Italy at +1%) to moderately negative (France -5%), up to a deeply negative figure for Spain, which falls by more than 40%.

The bulk market is strongly negative, with general figures falling by 10% (618 million USD), due in particular to the drops in Australia (-13%), New Zealand (-40%), France (-28%) and Argentina (-14%). Spanish transactions are stable, while Chilean and South African ones are strongly positive, at +15%.

Considering volume, the 7.2 million hectolitres exported by the top players register a -7%, with a decrease of Spain (-11%), Italy (-6%), but above all New Zealand (-40%) and Argentine (-35%). Positive, on the other hand, Chileans and Australians at +4%. In general, average prices increased, with Argentina at +32% (84 cents of a dollar), Spain at +13% (62), Chile at +10% (94) and Italy at +4% (95). Negative trends for Australia (-16%), South Africa (-17%) and France (-6%).

EXPORT OF WINES

2022/2021 % Change Values

EXPORT OF WINES - TOP SUPPLIERS

First Quarter

	,000 hectoliters			,000 US$		
Supplier	**2021**	**2022**	**% Chg.**	**2021**	**2022**	**% Chg.**
France	3,180	3,237	1.8%	2,590,712	2,986,550	15.3%
Italy	4,593	4,847	5.5%	1,739,060	1,912,375	10.0%
Spain	5,543	4,717	-14.9%	783,776	701,004	-10.6%
Chile	1,979	2,003	1.2%	429,897	433,048	0.7%
Australia	1,409	1,509	7.1%	334,071	335,301	0.4%
USA	699	667	-4.5%	292,940	330,204	12.7%
N. Zealand	683	522	-23.6%	305,095	261,749	-14.2%
Germany	725	793	9.4%	235,287	243,226	3.4%
Argentina	770	619	-19.5%	198,067	183,440	-7.4%
South Africa	841	1,049	24.7%	147,920	159,281	7.7%
Total	20,421	19,962	-2.2%	7,056,823	7,546,180	6.9%

EXPORT OF BULK WINES TOP SUPPLIERS

(,000 USD)

Supplier	2021	2022	% Chg.
Spain	142,745	143,576	0.6%
Chile	74,414	85,171	14.5%
Italy	81,374	79,491	-2.3%
Australia	90,683	79,291	-12.6%
France	96,424	69,789	-27.6%
N. Zealand	103,891	60,997	-41.3%
USA	41,971	40,585	-3.3%
South Africa	32,258	37,540	16.4%
Argentina	19,135	16,401	-14.3%
Germany	3,176	5,005	57.6%
Total	686,072	617,844	-9.9%

EXPORT OF SPARKLING WINES

(,000 USD)

	2021	2022	% Chg.
French sparkling	791,178	1,030,252	30.2%
Champagne	700,235	931,001	33.0%
Italian sparkling	383,240	481,718	25.7%
Prosecco	278,179	361,365	29.9%
Spanish sparkling	98,610	102,126	3.6%
Cava	76,026	80,406	5.8%
Global export	1,315,946	1,666,246	26.6%

EXPORT OF BOTTLED WINES

(,000 USD)

Supplier	Importer	2021	2022	% ch.
Australia	UK	30,786	27,336	-11.2%
Chile		30,945	37,983	22.7%
France		193,786	269,724	39.2%
Italy		76,532	90,313	18.0%
N. Zealand		29,289	40,733	39.1%
Spain		69,387	52,450	-24.4%
Australia	USA	59,115	63,029	6.6%
Chile		33,024	29,643	-10.2%
France		236,763	293,370	23.9%
Italy		301,299	313,406	4.0%
N. Zealand		80,776	74,183	-8.2%
Spain		64,168	58,253	-9.2%
Australia	China	3,072	929	-69.8%
Chile		56,606	57,207	1.1%
France		121,271	115,427	-4.8%
Italy		26,353	26,498	0.5%
Spain		24,692	14,670	-40.6%

*In these pages are some of the 2022 data for the main wine import and export countries, analysed and commented by the Wine Observatory of the Unione Italiana Vini (**www.wine-observatory.com**), and published by the Quarterly Report "Wine By Numbers."*

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

PERFORMANCES BY SUPPLIER

France

Region / Type

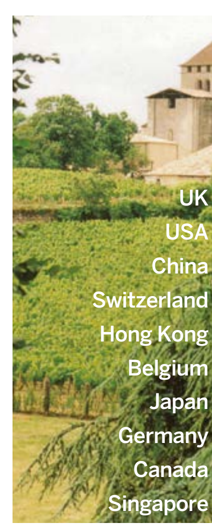
	Thousand litres		Thousand Euro		Euro/litre	
	2022	% Ch.	2022	% Ch.	2022	% Ch.
Champagne	27,438	35.3	826,897	43.1	30.14	5.8
Other sparkling	20,498	12.2	88,153	17.6	4.30	4.8
Sparkling total	47,936	24.4	915,050	40.2	19.09	12.7
Slightly sparkling	1,155	44.8	6,609	62.4	5.72	12.2
Bordeaux	37,573	-2.8	513,790	11.6	13.67	14.9
Burgundy	14,697	1.8	321,767	34.4	21.89	32.0
Alsace	4,029	-2.3	24,191	6.7	6.00	9.2
Val de Loire	8,316	1.9	64,820	21.0	7.79	18.8
Beaujolais	3,221	-2.0	19,331	11.4	6.00	13.7
Côtes du Rhône	14,807	3.4	109,245	16.6	7.38	12.7
Languedoc-Roussillon	8,117	-6.5	42,342	2.0	5.22	9.1
Igp-Vin de Pays	64,771	2.5	201,372	10.3	3.11	7.6
Varietals	17,371	9.2	50,353	15.5	2.90	5.8
Common wines	17,597	2.5	42,572	15.7	2.42	12.9
Others	36,787	20.4	246,873	37.4	6.71	14.2
Bottled total	228,441	4.2	1,643,265	19.5	7.19	14.7
2-10 liters	10,283	-14.3	32,296	10.2	3.14	28.7
Bulk	36,986	-22.6	61,986	-21.5	1.68	1.3
Total export	323,646	1.9	2,652,597	24.2	8.20	21.9

Champagne

	Thousand litres		Thousand Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	4,763	12.1	155,715	23.6	26.46	-10.8
UK	3,952	26.8	110,270	47.3	18.94	-21.1
Singapore	1,824	48.4	63,918	57.0	22.33	-32.6
Germany	2,246	34.3	56,893	47.5	17.17	-25.6
Japan	1,573	90.7	52,181	79.2	18.51	-47.6
Italy	1,383	60.8	44,885	61.9	20.05	-37.8
Belgium	1,475	41.1	36,172	46.3	16.76	-29.2
Switzerland	864	24.9	27,078	34.8	23.25	-19.9
Australia	1,105	25.1	25,662	24.2	18.69	-20.1
Spain	583	27.3	19,464	46.5	22.78	-21.4
South Korea	524	97.0	17,687	120.5	15.31	-49.2
Canada	500	33.0	17,233	38.1	24.96	-24.8
UAE	419	125.3	16,947	117.4	18.60	-55.6
Sweden	699	66.4	16,893	67.1	14.46	-39.9
Netherlands	427	19.9	12,044	-21.0	35.70	-16.6
South Africa	296	43.0	10,496	57.2	22.56	-30.1
Denmark	320	68.4	9,747	68.3	18.10	-40.6
Austria	314	92.6	9,149	121.1	13.18	-48.1
Mexico	412	160.8	9,097	162.2	8.42	-61.7
Nigeria	123	7.0	6,818	7.9	51.38	-6.5

Burgundy

	Thousand litres		Thousand Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	2,122	-16.3	44,040	29.5	20.75	54.6
UK	1,868	-7.5	42,976	40.8	23.00	52.2
Japan	1,054	-20.2	25,293	1.5	24.00	27.2
Hong Kong	227	-20.9	19,828	-12.8	87.42	10.3
Switzerland	252	-24.9	17,419	81.0	69.21	141.1
Canada	1,034	-29.3	14,472	-5.9	14.00	33.1
China	508	10.5	12,105	26.8	23.81	14.7
Belgium	1,005	-16.4	9,953	0.0	9.91	19.6
Taiwan	148	-16.7	8,666	0.4	58.55	20.4
South Korea	312	-12.5	8,077	24.8	25.87	42.7
Denmark	319	-42.3	7,455	-4.7	23.40	65.1



Bordeaux

	Thousand litres		Thousand Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
UK	3,635	24.7	73,638	42.5	20.26	14.2
USA	3,695	8.2	56,012	57.1	15.16	45.1
China	5,455	-16.3	55,053	-0.8	10.09	18.5
Switzerland	1,437	-0.8	46,865	1.6	32.61	2.5
Hong Kong	1,139	-20.9	43,692	-34.4	38.35	-17.1
Belgium	4,140	9.6	34,342	26.1	8.30	15.1
Japan	3,557	-4.2	31,228	2.7	8.78	7.3
Germany	2,971	-21.1	28,096	-8.6	9.46	15.9
Canada	1,497	16.5	13,870	13.0	9.26	-3.0
Singapore	215	-26.3	8,956	-3.8	41.61	30.5

Italy

Bottled Still Wines

	Litres		Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	49,476,714	2.9	253,774,615	13.8	5.13	10.5
Germany	52,145,355	-7.0	183,489,671	-0.7	3.52	6.8
Canada	15,898,031	26.7	81,784,990	37.5	5.14	8.5
Switzerland	10,334,429	-6.9	76,887,269	9.7	7.44	17.8
UK	27,066,266	20.5	76,773,030	26.7	2.84	5.2
Netherlands	10,747,181	-4.1	42,338,447	4.1	3.94	8.5
Denmark	7,965,432	14.2	37,390,809	29.7	4.69	13.5
Japan	7,685,635	26.6	31,346,642	28.3	4.08	1.4
Belgium	8,442,596	27.0	29,573,759	42.9	3.50	12.5
Sweden	5,595,524	20.4	28,371,919	25.0	5.07	3.8
France	4,914,954	24.4	26,195,379	51.2	5.33	21.5
China	3,994,107	-16.8	19,005,335	-1.7	4.76	18.2
Norway	2,752,830	21.8	15,277,691	24.8	5.55	2.4
South Korea	2,185,111	-10.2	14,738,461	1.6	6.74	13.2
Austria	3,310,795	2.3	12,877,268	21.9	3.89	19.1
Russia	3,752,645	-29.0	9,931,696	-21.4	2.65	10.6
Poland	3,165,549	-9.3	9,888,861	2.7	3.12	13.3
Finland	1,342,295	-14.6	6,168,478	-10.4	4.60	5.0
Czech R.	1,689,520	3.1	5,699,115	31.3	3.37	27.3
Brazil	1,413,557	7.3	5,046,440	8.5	3.57	1.1
Ireland	1,568,742	33.4	4,984,008	44.0	3.18	7.9
Spain	856,597	46.3	4,731,530	70.7	5.52	16.6
Hong Kong	367,779	2.1	3,401,908	3.5	9.25	1.4
Mexico	623,325	57.8	2,326,989	78.8	3.73	13.3
Others	15,503,314	10.5	69,330,332	14.8	4.47	3.9
Total	242,798,283	4.5	1,051,334,642	14.4	4.33	9.5

Prosecco

	Litres		Euro		Euro/litres	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	23,007,931	8.5	97,666,457	20.1	4.24	10.8
UK	20,653,994	63.6	74,781,156	93.2	3.62	18.1
France	4,546,602	15.2	17,154,468	36.4	3.77	18.4
Germany	4,100,519	27.0	16,834,086	37.6	4.11	8.4
Belgium	4,648,375	17.3	16,368,000	42.1	3.52	21.1
Canada	1,891,592	56.2	10,280,634	76.2	5.43	12.8
Switzerland	2,066,955	11.6	9,963,127	18.6	4.82	6.3
Sweden	1,964,959	-3.5	8,163,232	3.1	4.15	6.8
Poland	2,102,726	79.7	7,835,664	84.8	3.73	2.8
Austria	1,425,541	15.2	6,781,884	22.5	4.76	6.4
Russia	1,594,590	-12.2	6,104,768	-4.2	3.83	9.2
Netherlands	732,948	5.8	3,292,759	17.2	4.49	10.7
Czech R.	508,494	33.8	2,196,103	50.6	4.32	12.5
Japan	450,860	28.4	2,162,252	32.7	4.80	3.4
Spain	542,845	10.5	2,125,431	49.2	3.92	35.0
Norway	449,054	85.0	2,065,963	82.1	4.60	-1.6
Ukraine	390,160	-16.7	1,637,986	-12.8	4.20	4.7
Finland	338,260	-16.5	1,567,844	-9.8	4.64	8.0
China	297,347	-5.4	1,312,766	24.6	4.41	31.7
Denmark	282,505	35.8	1,162,087	54.0	4.11	13.4
Ireland	243,015	-6.0	1,076,731	15.7	4.43	23.1
South Korea	142,483	-11.1	754,810	2.6	5.30	15.4
Others	6,742,394	39.7	29,674,810	55.9	4.40	11.6
Total	79,124,149	25.4	320,963,018	40.0	4.06	11.7

Italy

Bulk

	Liters		Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
Germany	44,162,933	-11.2	26,425,521	-10.2	0.60	1.1
Switzerland	4,879,041	6.4	7,506,957	1.7	1.54	-4.4
France	9,084,880	38.9	6,784,885	78.2	0.75	28.2
UK	3,905,642	11.5	3,981,980	37.7	1.02	23.4
USA	655,459	-45.4	3,877,381	3.2	5.92	88.9
Austria	4,851,207	53.0	3,661,118	87.3	0.75	22.5
Denmark	2,318,198	-0.4	2,806,460	27.8	1.21	28.3
Sweden	1,946,724	-39.2	2,264,401	-32.8	1.16	10.5
Canada	1,685,501	12.9	1,842,246	38.1	1.09	22.3
Norway	953,316	-17.1	1,832,709	-19.9	1.92	-3.4
Czech R.	2,197,250	-9.9	1,264,302	8.0	0.58	19.8
Belgium	595,192	62.6	1,115,550	147.3	1.87	52.1
China	556,296	94.5	982,965	31.5	1.77	-32.4
Poland	872,283	78.3	969,470	157.1	1.11	44.2
Spain	873,499	-47.1	662,103	-47.0	0.76	0.2
Japan	536,384	58.9	641,728	41.2	1.20	-11.1
Others	3,497,567	-44.1	3,982,168	-4.9	1.14	70.0
Total	83,571,372	-5.8	70,601,944	5.3	0.84	11.8

Sparkling Wines

	Litres		Euro		Euro/litres	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	4,131,630	-0.8	13,379,355	7.1	3.24	8.0
Belgium	4,165,594	38.1	11,017,499	49.7	2.64	8.4
Germany	4,764,686	-14.4	10,889,297	1.0	2.29	18.0
Japan	2,508,279	3.3	7,681,388	5.3	3.06	1.9
Sweden	1,947,670	51.5	6,521,876	48.7	3.35	-1.9
UK	2,414,918	-11.3	6,131,243	-9.2	2.54	2.4
Netherlands	1,388,233	27.1	4,536,189	-20.8	3.27	-37.7
France	2,063,145	14.5	4,200,027	4.2	2.04	-9.0
Canada	631,354	40.7	3,250,332	47.1	5.15	4.6
Switzerland	458,205	37.3	1,772,133	40.7	3.87	2.5
Finland	454,374	-33.7	1,541,347	-22.6	3.39	16.8
Mexico	832,381	187.3	1,520,185	178.9	1.83	-3.0
Denmark	253,057	39.7	1,011,231	38.9	4.00	-0.6
South Korea	244,471	-32.3	928,820	-24.9	3.80	10.8
Poland	493,785	21.1	889,017	14.3	1.80	-5.6
Norway	182,641	30.2	751,461	33.1	4.11	2.2
Brazil	270,439	-21.3	606,471	-19.4	2.24	2.4
China	173,169	-17.3	539,718	-5.3	3.12	14.5
Austria	220,414	-14.3	513,703	-16.6	2.33	-2.7
Russia	103,661	49.0	484,059	97.6	4.67	32.6
Italy	111,415	32.3	389,490	5.7	3.50	-20.1
Others	3,859,209	26.7	12,427,381	19.1	3.22	-6.0
Totale	31,672,728	9.4	90,982,223	12.2	2.87	2.5

Spain

Bottled Still Wines

	Litres		Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	9,542,858	-14.1	51,730,825	-2.1	5.42	14.0
UK	15,664,273	-24.4	46,564,643	-17.9	2.97	8.6
Germany	18,664,512	-31.9	44,738,116	-19.1	2.40	18.7
Switzerland	3,855,016	-11.7	32,754,088	10.8	8.50	25.4
Netherlands	8,225,326	-12.6	21,070,335	-5.7	2.56	7.9
Canada	4,328,532	-17.3	20,806,323	-10.1	4.81	8.8
France	11,145,483	-1.5	15,702,962	20.2	1.41	22.1
China	5,500,697	-39.9	13,027,269	-36.0	2.37	6.5
Mexico	3,126,912	23.9	11,294,177	18.1	3.61	-4.7
Japan	4,009,155	-18.1	11,082,131	3.8	2.76	26.8
Belgium	2,539,122	-17.1	9,944,952	4.1	3.92	25.6
Portugal	17,859,652	-37.2	9,413,666	-21.0	0.53	25.8
Sweden	1,802,499	-3.3	8,575,879	17.5	4.76	21.4
Denmark	2,351,211	-21.1	6,920,466	-9.1	2.94	15.1
South Korea	1,563,204	-33.1	5,752,568	-16.3	3.68	25.0
Ireland	1,377,497	-43.1	5,180,290	-28.5	3.76	25.7
Poland	2,034,870	-6.7	4,367,599	2.8	2.15	10.2
Russia	2,985,818	5.5	4,261,381	6.9	1.43	1.3
Norway	650,908	-8.9	3,615,339	-6.9	5.55	2.1
Brazil	1,199,910	-25.3	2,880,097	-26.4	2.40	-1.5
Italy	2,884,080	-44.9	2,753,207	13.4	0.95	105.9
Finland	734,759	-26.1	2,388,034	-8.6	3.25	23.6
Hong Kong	412,628	-15.9	2,383,257	-19.8	5.78	-4.5
Austria	446,628	1.3	2,070,977	24.8	4.64	23.2
Czech. R.	1,550,843	-41.6	1,722,648	-44.1	1.11	-4.2
Ukraine	706,649	-28.4	1,347,612	-31.9	1.91	-4.9
Others	21,310,366	-14.1	49,725,480	2.2	2.33	18.9
Totale	146,473,408	-23.0	392,074,321	-7.4	2.68	20.2

Bulk

	Liters		Euro		Euro/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
France	101,622,514	-0.7	42,169,129	28.1	0.41	29.0
Germany	59,542,048	-12.5	23,723,327	6.7	0.40	21.9
Portugal	32,659,370	-14.7	16,133,585	9.3	0.49	28.2
Italy	31,301,203	-0.6	12,492,280	6.8	0.40	7.5
UK	5,055,797	38.4	3,093,293	47.3	0.61	6.4
China	2,782,287	-29.2	1,803,697	-1.2	0.65	39.5
Denmark	2,732,696	-13.8	1,657,560	-10.1	0.61	4.2
Belgium	2,731,235	-11.0	1,591,259	2.0	0.58	14.6
Canada	2,177,731	-35.5	1,192,591	-19.2	0.55	25.3
Poland	1,593,518	2.5	1,180,147	10.3	0.74	7.6
Switzerland	2,294,615	47.1	1,130,823	30.9	0.49	-11.0
USA	927,545	-2.3	1,121,222	-20.0	1.21	-18.1
Mexico	1,085,903	-28.1	964,359	3.8	0.89	44.4
Czech. R.	1,792,223	-53.4	697,473	-45.8	0.39	16.2
Japan	999,786	-8.3	584,148	-15.0	0.58	-7.3
Finland	697,978	-39.5	578,540	-17.4	0.83	36.5
Netherlands	517,594	-50.4	448,935	-40.0	0.87	20.9
Sweden	687,278	23.3	431,430	-30.9	0.63	-44.0
Norway	152,021	-39.1	215,766	-11.6	1.42	45.1
Russia	169,212	-56.4	91,124	-37.5	0.54	43.4
Others	31,874,137	-25.9	16,223,866	-5.3	0.51	27.7
Total	283,396,690	-9.8	127,524,554	9.7	0.45	21.7

Australia

Bottled Still Wines

	,000 litres		,000 AUD		AUD/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	20,077	2.2	87,299	13.7	4.35	11.2
UK	7,356	-9.9	37,862	-5.3	5.15	5.1
Canada	6,395	14.8	35,537	20.8	5.56	5.2
Hong Kong	1,480	-9.8	25,736	-16.6	17.38	-7.4
New Zealand	4,072	110.4	17,793	87.4	4.37	-10.9
Singapore	1,293	25.0	16,784	19.5	12.98	-4.4
Thailand	1,114	199.5	12,466	367.4	11.19	56.1
Japan	1,983	35.3	12,349	-0.7	6.23	-26.7
South Korea	1,134	-31.0	11,576	-8.9	10.21	32.0
Netherlands	1,777	-30.6	7,716	-30.6	4.34	0.1
Malaysia	629	52.1	6,222	55.5	9.89	2.2
Sweden	875	-22.1	4,982	-25.7	5.69	-4.7
Taiwan	672	-3.6	4,964	-30.5	7.39	-27.9
UAE	712	6.1	4,295	15.6	6.03	9.0
Denmark	451	-36.5	3,138	5.1	6.96	65.5
Germany	348	-1.2	3,138	51.8	9.01	53.7
Ireland	547	21.2	2,363	18.9	4.32	-1.9
China	170	-76.7	1,287	-67.8	7.58	38.6
Others	4,776	32.1	28,416	31.1	5.95	-0.8
Total	55,860	5.8	323,923	10.3	5.80	4.2

Bulk

	,000 litres		,000 AUD		AUD/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
UK	46,413	4.4	56,059	-9.1	1.21	-12.9
USA	13,439	46.7	19,495	44.1	1.45	-1.8
Belgium	5,560	-1.5	6,206	-15.2	1.12	-13.8
Denmark	3,608	-27.7	4,444	-39.4	1.23	-16.1
Canada	4,107	14.1	4,317	-26.5	1.05	-35.6
Netherlands	3,242	-51.3	3,830	-58.9	1.18	-15.6
New Zealand	1,987	655.8	2,683	100.8	1.35	-73.4
Japan	1,636	70.2	2,239	86.6	1.37	9.6
China	768	-28.8	2,096	-52.1	2.73	-32.8
Finland	1,080	-26.1	1,108	-38.5	1.03	-16.8
Germany	696	-29.6	740	-42.8	1.06	-18.8
France	576	0.0	623	-20.4	1.08	-20.4
Norway	240	-23.1	258	-47.6	1.08	-31.8
Sweden	96	-71.4	127	-68.1	1.32	11.7
Italy	24	100.0	46	130.0	1.92	15.0
Others	672	151.6	5,552	433.8	8.27	112.2
Total	84,144	4.2	109,823	-6.8	1.31	-10.5

New Zealand

Bottled Still Wines

	,000 litres		,000 NZD		NZD/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	12,470	-6.6	109,943	-1.8	8.82	5.2
UK	6,536	26.6	60,369	48.7	9.24	17.5
Australia	4,440	-26.3	40,998	-13.1	9.23	18.0
Canada	2,845	28.5	32,437	46.4	11.40	14.0
Ireland	524	-26.2	5,519	-15.3	10.53	14.9
China	348	-20.6	5,409	-11.9	15.53	10.9
Netherlands	466	-32.5	4,069	-16.8	8.73	23.3
Singapore	222	-31.5	3,926	-17.2	17.66	21.0
France	202	23.8	3,898	57.7	19.25	27.4
Japan	222	22.3	2,728	14.7	12.28	-6.2
Germany	271	-22.5	2,651	-10.1	9.78	16.0
Hong Kong	187	-33.0	2,386	-26.2	12.73	10.2
Denmark	201	0.8	1,668	-4.3	8.30	-5.1
Sweden	149	-17.3	1,418	-20.7	9.52	-4.2
UAE	92	60.8	1,064	97.5	11.51	22.8
Others	1,933	-2.3	18,421	7.5	9.53	10.1
Total	31,109	-3.7	296,903	7.4	9.54	11.6

Argentina

Bottled Still Wines

	litres		$		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	11,410,944	-11.5	50,751,172	-6.1	4.45	6.2
UK	6,384,381	-0.9	21,949,876	2.8	3.44	3.8
Brazil	6,085,344	8.8	18,826,571	11.4	3.09	2.3
Canada	2,161,334	-32.7	9,964,534	-29.1	4.61	5.4
Mexico	1,850,286	-9.1	6,243,264	-2.4	3.37	7.4
Netherlands	1,414,344	-27.4	5,076,586	-31.7	3.59	-5.9
China	714,260	-35.8	3,514,005	-34.4	4.92	2.1
Peru	760,755	43.8	3,467,265	59.0	4.56	10.6
Colombia	840,191	47.3	2,809,198	25.8	3.34	-14.6
Ireland	784,456	10.5	2,443,488	2.5	3.11	-7.2
Switzerland	521,763	-19.8	2,414,666	-31.0	4.63	-13.9
Germany	463,079	-31.9	2,381,503	-25.2	5.14	9.8
France	281,738	15.2	1,812,244	33.3	6.43	15.7
Japan	377,533	-2.0	1,695,571	0.7	4.49	2.8
Russia	620,808	-45.4	1,608,187	-47.0	2.59	-2.9
Paraguay	296,210	-53.3	1,506,813	-36.2	5.09	36.6
Denmark	221,069	-39.3	1,256,873	-31.2	5.69	13.4
Belgium	269,684	-14.2	1,046,180	-19.0	3.88	-5.6
Sweden	187,951	-57.1	870,387	-49.8	4.63	17.0
Finland	222,297	59.1	845,199	28.3	3.80	-19.4
Others	6,201,040	-5.0	26,008,376	2.9	4.19	8.3
Total	42,069,467	-9.7	166,491,958	-6.6	3.96	3.4

Chile

Bottled Still Wines

	,000 litres		,000 $		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
China	14,049	-6.9	57,207	1.1	4.07	8.5
UK	12,331	25.3	37,983	22.7	3.08	-2.0
USA	8,950	-13.6	29,643	-10.2	3.31	3.9
Brazil	11,080	-11.5	29,560	-12.5	2.67	-1.1
Japan	10,584	10.5	29,257	7.3	2.76	-2.9
Canada	5,376	11.6	20,900	8.7	3.89	-2.6
Netherlands	5,500	-30.2	17,536	-33.2	3.19	-4.4
Mexico	4,346	48.7	11,110	47.2	2.56	-1.0
South Korea	2,419	-48.3	10,200	-50.3	4.22	-3.9
Ireland	2,900	11.7	8,285	-4.6	2.86	-14.7
Colombia	2,411	23.6	6,610	27.7	2.74	3.3
Russia	2,684	14.4	6,458	16.7	2.41	2.0
Germany	1,508	-32.2	5,568	-26.3	3.69	8.7
Denmark	1,311	-25.1	4,668	-37.6	3.56	-16.6
France	407	21.6	3,785	138.7	9.30	96.3
Belgium	1,144	15.6	3,651	2.7	3.19	-11.2
Paraguay	1,278	67.8	3,355	68.6	2.63	0.5
Sweden	914	-5.2	2,786	-22.2	3.05	-18.0
Finland	879	-1.0	2,672	-7.6	3.04	-6.7
Others	15,051	20.2	48,102	15.2	3.20	-4.2
Total	105,122	0.1	339,336	-1.6	3.23	-1.7

Bulk

	,000 litres		,000 $		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
USA	26,866	0.6	21,442	3.7	0.80	3.0
China	18,430	29.7	20,823	64.9	1.13	27.1
UK	19,358	18.2	19,292	23.8	1.00	4.7
Germany	5,977	-19.4	5,292	-10.2	0.89	11.4
Japan	4,898	-5.9	3,929	0.5	0.80	6.8
France	3,888	67.0	3,452	84.5	0.89	10.5
Denmark	1,777	-35.6	2,304	-31.8	1.30	5.9
Spain	2,856	197.5	2,044	220.9	0.72	7.9
Canada	1,416	-70.9	1,146	-66.7	0.81	14.3
Sweden	408	-43.3	776	-40.2	1.90	5.6
Argentina	416		499		1.20	
Netherlands	459	-79.2	428	-73.6	0.93	26.8
Belgium	384	-55.2	410	-50.6	1.07	10.4
Finland	360	-16.7	389	-32.0	1.08	-18.3
Others	3,058	36.2	2,944	42.7	0.96	4.8
Total	90,552	3.8	85,171	14.5	0.94	10.3

South Africa

Bottled Still Wines

	Litres		Rand		Rand/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
UK	6,763,680	17.5	334,331,024	14.3	49.43	-2.8
Netherlands	3,827,694	2.0	152,977,985	-14.2	39.97	-15.8
USA	1,977,277	-2.2	130,469,901	11.7	65.98	14.2
Germany	3,229,825	20.4	127,736,383	-5.2	39.55	-21.2
Namibia	4,184,308	9.9	97,932,951	8.5	23.40	-1.2
Canada	1,411,132	4.6	97,767,349	13.6	69.28	8.6
China	740,131	-32.9	56,250,293	-21.3	76.00	17.3
Belgium	869,453	19.6	54,735,758	29.1	62.95	7.9
Sweden	827,423	11.8	48,890,517	-10.5	59.09	-19.9
Tanzania	1,129,931	77.9	36,921,689	68.0	32.68	-5.6
Russia	996,426	-25.5	31,915,533	-28.7	32.03	-4.3
United Arab Em.	532,560	36.8	29,745,928	23.3	55.85	-9.9
Japan	364,807	2.9	27,648,735	23.6	75.79	20.1
Kenya	541,793	-11.6	24,008,122	-15.1	44.31	-3.9
Denmark	285,370	2.8	20,843,764	4.6	73.04	1.7
Finland	123,368	19.9	5,662,247	11.7	45.90	-6.9
Others	8,576,905	60.4	377,245,100	50.2	43.98	-6.4
Total	36,382,083	17.4	1,655,083,279	11.5	45.49	-5.0

USA

Bottled Still Wines

	.000 litres		.000 $		$/litre	
	2022	% Chg.	2022	% Chg.	2022	% Chg.
Canada	12,301	8.5	109,892	11.5	8.93	2.8
Japan	2,286	77.7	26,649	87.2	11.66	5.4
South Korea	2,025	-32.1	23,470	10.6	11.59	62.9
Hong Kong	1,201	0.1	18,097	9.4	15.06	9.3
UK	1,640	5.2	11,647	-0.4	7.10	-5.3
China	602	-35.7	5,706	-28.5	9.48	11.2
Switzerland	489	-28.4	5,556	24.8	11.36	74.4
Sweden	747	0.7	5,474	-0.1	7.33	-0.8
Denmark	932	5.9	5,227	-19.4	5.61	-23.9
France	1,034	111.1	4,874	56.3	4.71	-25.9
Mexico	747	-1.6	4,766	18.0	6.38	19.9
Singapore	300	23.8	4,264	96.1	14.21	58.5
Taiwan	498	-9.8	3,430	-18.0	6.89	-9.1
Belgium	193	3.1	2,641	0.6	13.72	-2.4
Germany	661	-35.1	2,579	-23.1	3.90	18.5
Netherlands	237	-26.7	2,038	-23.5	8.62	4.4
Philippines	285	-37.8	1,158	-19.2	4.06	29.7
Others	5,899	6.3	42,340	36.4	7.18	28.3
Total	32,078	2.9	279,808	16.0	8.72	12.8




Celebrities are crazy about Rosè: from left to right, Cameron Diaz and her business partner Katherine Power; Sarah Jessica Parker; George Clooney; the app Grapestar, focused on "celebrity drinks;" images from the Instagram account of Jon Bon Jovi

INTERVIEW WITH ELIZABETH GABAY, THE MOST INFLUENTIAL MASTER OF WINE ON ROSÉ WINES

GALAXY OF ROSÉ WINES:

Quality In Search Of An Author (And Value)... Beyond Glamour

By **FABIO CIARLA**

Captivating celebrities and packaging have always been a reference point when it comes to rosè wines (see the article on Sta wines appeared in CV 28-2021), but what everybody hoped is that fashion would pass and contents remain. According to **Elizabeth Gabay**, Master of Wine, among the leading experts in the field and author of "Rosé: Understanding the Pink Wine Revolution" and "Guide to the Rosés of southern France" (the 2022 edition in progress), there isn't yet a new vision of rosé wines, which are seen by many people as easy and cheerful drinking products. The problem, of course, is more of value rather than numbers. The buying rush continues everywhere, but there are few territories – or perhaps, according to Gabay, it would be better to talk about individual producers – that are also able to grow in valorization. The Provencal style continues to be the general reference point, while even sparkling wines partially discount the approach to pink as a glamorous colour. An example of this vision, coming to still wine, however, may be the choice of Gallo to market in the UK its "Whites" (Zinfandel and Grenache), which are actually rosé wines, with a recommended price displayed on the label. Beyond the price, 6.49 English pounds or below the 7 pounds, a maximum limit for 85% of rosè wines in the country, what is striking is precisely the bet in terms of marketing and commercial policies. The product is evidently suitable for certain logics, as can be read in the words of Gabay in the interview that follows. The choice of LVMH with Domaine Galoupet, which in the wave of sustainability, has marketed a rosé in a PET plastic bottle and one in a recycled glass bottle (therefore dark and not transparent as usual) has a different breath. A bet that aims to position wines at the top, using packaging not to make the sale easier but to make the purchase more conscientious. In short, rosé has yet to earn the stars of great wine, but the possibilities – even in new producing countries such as Eastern Europe and the New World – are not lacking. However, it is necessary for rosé wines to come out from an exclusively commercial logic, in a similar way of what happened where everything – we could say – began: the Chateau Miraval of Brad Pitt and, at the time, of Angelina Jolie, who invested on their own charming potential that other wines did not have, to affirm a distinctive organoleptic quality in which lies the secret of its value..

Are rose wines still in the race all over the world or are there differences between "mature" markets (France, Italy, United States) and newer ones? Which are the countries where this type continues to grow the most?

Not sure if there is still a race to make rosé. Production feels like it has settled to a steady part of production – red, white, rosé. What has not changed is how most people regard rosé. Producers often see it as a cheap and easy cash crop – sold at half the price of their other wines for a quick sell, often not even including the wine on their website. It is regarded as an easy wine – there are still articles being written about serving rosé ice cold, with ice, an easy drink... Right now, to me, it feels less like a region or country which is moving forward fast, but more individual producers. I'm working on a book right now on the rosés of southern France and it has been interesting to see the growing number of producers making innovative and interesting wines. The same in Spain, Italy, Austria, Germany, Australia, South Africa. It is a case of knowing your producer.

Elizabeth Gabay

Sustainability and packaging are two strong points in the wine world of recent years, are they also important for pink wines?

Very much so in terms of bag in box and tin cans – but this is for entry-level wine. But the focus on buying the colour pink means there is a focus on clear bottles which is not so sustainable. Domaine Galoupet – recently bought by LVMH – have made a big statement by using dark recycled glass for their rosé and recycled plastic for their entry level wine.

Does the "celebrity wine" phenomenon still work? Do these wines "also" need a different push or are they sold just because pink is fashionable?

Sadly, yes, it does still work – as I said in my first answer – rosé is still not treated seriously. It is a lifestyle product, not a serious wine.

The other great phenomenon in the consumption of wine is that of bubbles, but does a rosé sparkling wine for consumers fall into the category of "sparkling wines" or that of "rosé?" I mean, how do you sell or should you sell a rosé sparkling wine?

A bit of both. A continuation of the lifestyle marketing. Maybe in a world where things have gone a little crazy – bubbles and especially pink bubbles make people feel good. As with still rosé, marketing and packaging are very important. Very few question whether pink sparkling actually tastes rosé if compared to white bubbles. Both rose and sparkling wine are marketed as lifestyle and luxury wines. Not necessarily because they are expensive, but because their marketing image suggests glamour. But... in terms of production. It is interesting to see that rosé champagne does not have a limit on the colour. If anything, rosés champagne can be very dark especially amongst the small grower champagnes. This is not just significant in terms of colour, but what the consumer is looking for in terms of high-quality sparkling rosé. These darker pink wines will have more pronounced red fruit character and this is important. A number of sparkling wine producers taste and blend using black glasses to ensure that the black or red fruit character is evident – and it is this extra fruit character which is so interesting. For me I prefer sparkling rosé which tastes much more strongly of darker fruit.

Referring to the side of production, while France is first without problems, what are the producer countries that, according to your point of view, have more chances to grow? Spain and Italy certainly have the numbers on their side, but are we forgetting someone important for rosé wines?

There are a number of key factors. Interesting grape varieties, regional styles, good producers. I have been very impressed with rosés from Austria, Greece and the Balkans. With Covid, there has been less opportunity to follow rosé development in the New World – so maybe once the world returns to normal – there will be some great surprises. However, I think it is less likely to see one particular region growing or becoming more important – right now market styles, creativity and development is being driven by individual producers. Maybe not large volumes, but growth in a more creative way. Talking to producers around the world, however, it is not always so simple. The market is quite saturated and competitive with simple, pale pink rosé. Even if very good rosé. But many producers are lost as to how to make the rosé stand out in the crowd. Some felt they had made excellent darker rosé but just cannot sell any rosé darker than the classic pale pink Provence-style. The traditional clarets of Bordeaux or the Cerasuolo d'Abruzzo are often much paler than they once were. Others are trying to make a good oaked rosé – but this can be difficult too – getting the right balance of oak and fruit. Some regional styles are very distinctive – many central European and American rosés have slightly more residual sugar to create a fruitier style. The international market is not yet ready to accept regional variations in rosé. Hybrid versions have appeared -retaining the residual sugar but making the wine paler – which to my mind does not work – the wines have less fruit character.

The typology is still growing, but the phenomenon expiates a fashionable and glamorous birth that keeps most of the productions inside an easy and undemanding consumer environment. Interesting surprises are coming from many countries, the Provencal style is always the global reference point, while the phenomenon of sparkling wines manages to partially reset the pink color upwards. But the conditions for a new future on the markets are all there

THE WINE LIST

In 2021 they were our "Theme of the year," but 2022 seems to be not less important for "rosé" wines, and it is therefore that we have created with pleasure another "Wine List" dedicated to this typology on the Wine World Magazine.
It is a new way to present the labels: the wines are suggested through technical sheets drawn by the producers, organized in a continuous flow, marked by proposals for pairing with food. A "Wine List" introduced and illustrated also thanks to the advice of an expert sommelier (see box).
The purpose of this new form of presentation with the labels proposed by the firms is double, on one hand to make more interesting the discovery of the particularities of each single wine and, on the other, to facilitate the work of those who operate in the international trade sector. Our pairings are in fact designed to meet and stimulate the curiosity of the global wine consumer, to offer useful information to specialized operators (importers, sommeliers, restaurant owners, wine merchants, etc.), while at the same time they promote labels produced and distributed all over the world and matched to flavours and recipes from the territories where the wines presented in the wine lists are produced. Faithful to the principle that there is a sort of "pre-established harmony" which, through the earth, links aromas and flavours of grapes – and therefore of wines – to typical agri-food products – and thus to the recipes – of the same territory.

The ROSÉ WINE Towards Maturity

A Wine list with the sommelier's advice for a "buying guide" that travels between Northern and Southern Italy, in order to discover a production that sees Prosecco Rosé as a solid main character in the sparkling wine sector, while the still wines of the historical territories are even now all there

The desire for lightness and joy of the last months of the pandemic, hoping they will really be the last, has encouraged the consumption of rosé wine, with a boom that the Wine World Magazine has narrated in its various facets, also dedicating a large coverage to it in June 2021.
The 2022 seems to be a year of maturity for the rosé wine, which continues to be at the center of a lot of attention, and generates today an excessive offer on the market compared to the demand that, in fact, is stable. A phenomenon in some ways normal, which also indicates a very specific path, that is in the search of an identity and the improvement of the value of productions. For this reason, it is also interesting to explore the many expressions of these wines in the following Wine List, in order to understand the different shades of colour and the typical characteristic of the territory, for an occasion of consumption and capacity of impact on the collective imagination. A specific reflection on Prosecco rosé is unavoidable, a typology that saw its official launch last year and which, in a very short time, was confirmed in the role of absolute leading character when it comes to rosé bubbles.
The 11 wines on the list will be with us on a "pink journey" made of typical products and traditional dishes, occasions for consumption even outside the usual meals and with modern integrations between international dishes and Italian wines. A few bets, some solidly known choices but most of all an idea, to be implemented according to one's tastes and the raw materials that are easier to find, in order to stimulate the curiosity of the trade and the consumer. Let's go and discover how new, curious, interesting and original our rosé wine production is today.

The Sommelier
SAMUELE CALISTRI

He is one of the most promising Italian sommeliers: Samuele Calistri, who returned to Italy only because of the closure of restaurants due to the pandemic, is not the kind of person who likes to sit back. He has in fact started his own distribution of wines with exclusives from all over the world. Although starting from the family tables of the "Trattoria del Cimino da Colombo dal 1940" in Caprarola, in the province of Viterbo (awarded with the "Wine Spectator Restaurant Awards" for the selection of wines), Samuele, after all, has almost always worked abroad. Just to mention the most prestigious assignments, he worked with restaurants with one, two and three Michelin stars in Moselle, Geneva, London and Rome. Samuele has the Wset Diploma and is a Saké Sommelier, he belongs to international juries of wine competitions and has reached the first place at the Ruinart Sommelier Challenge in Switzerland in 2017, where he had already been the Ambassador of Champagne for the Swiss country in 2015.

PINKPROJECT
THE THIRD COLOUR OF WINE

Rosé wine, with its different styles, from still to sparkling, from the most elegant, mineral and citrine wines to the fuller, rounder and more complex ones, is able to become one of the best "friendly wine pairing" on the table. Thanks to these characteristics, it manages to balance the six flavours (bitter, sweet, salty, sour, fatty, umami) without any problems, in a perfect game of cross references, analogies and contrasts.
But the summer season, in this case, takes us also to the terraces, perhaps overlooking the vineyards, where we can toast with **Prosecco Doc "Rosé 2821" by Zonin 1821** matched with interesting white fish finger food. A light aperitif, even standing up and perhaps by the pool, will be equally appreciated accompanied by the bubbles of **Prosecco Doc Rosè de Le Contesse.** Glamour evenings are also the ideal context for **"Afra," the Prosecco Doc Rosé of Perlage Winery** which, being an Extra Dry, can pair perfectly with some crudité for a wonderful match.
Approaching to the evening, and therefore to dinner time, takes us to focus on appetizers that enrich the gastronomic side, and with rosé wines there is no shortage of matching possibilities, indeed they expand. If we have shellfish carpaccio, raw fish and dishes such as sushi and sashimi, the rosé wine must add fresh, saline and citrus notes, in order to respond to the sweet trend of these dishes, which is why we have chosen the Prosecco **Doc Rosé Treviso Brut Millesimato Collezione Serenitatis 2021 by Montelvini**, creamy and with the right persistence.
Today's gastronomy is more global than ever, it is not just exotic charm, but also dishes and ingredients that now belong to the common use of catering and also to the tastes of lovers of new sensations. For this type of cuisine, where spices and spicy notes are often very important, wines with a certain softness and a slight sugary residue are needed, such as **"Violette," Incontro Manzoni Moscato 13.0.25 Rosé by Conte Collalto**, an Extra Dry that mixes softness and delicate aromas of roses and wild berries.

ZONIN WWW.ZONIN1821.COM

"ROSÉ 1821" ZONIN PROSECCO DOC

Vinification and ageing
The blend of Glera and Pinot Nero (vinified in red), coming from the same harvest, are naturally fermented in pressurised stainless steel tanks (Charmat Method) for a period of at least 60 days.
Tasting notes
Colour: a lightly-coloured sparkling rosé with a fine perlage and soft, persistent foam.
Bouquet: fragrant and fruity with hints of wisteria flowers, Renette Apple and red berries, including wild strawberries.
Flavour: fresh and delightful. On the palate it is soft and smooth with floral notes and a hint of almond.
Food pairings
Excellent as an aperitif and an ideal accompaniment to hors d'oeuvres risottos, fragrant fried food and grilled fish.

LE CONTESSE WWW.LECONTESSE.IT

PROSECCO DOC ROSÉ

Respecting tradition and love for the territory, the Bonotto family invests in research and technological innovation, to guide this company through continuous evolution. For us, tradition is to keep the organoleptic characteristics of the must given by the fruit as intact as possible, because it is in the fruit that the precious nectar that releases the aromas and flavors of the wine is found. Our bubbles can boast of being 100% Made in Italy: we check the entire supply chain, from grapes to the bottle, managing to produce various formats to satisfy every need. We have scrupulous attention in the choice of suppliers who must meet Italian quality requirements, animated by the same attention and passion for excellence. Le Contesse has distinguished itself in the sparkling wine production scene thanks to the passion and the desire to celebrate its values all over the world, through bubbles and a family. This refined Prosecco Rosè made of 85% Glera grapes and 15% Pinot Noir from the hills, is a wine that goes perfectly with your aperitifs, both finger food or simply alone, perhaps sitting on a splendid terrace overlooking the sea. Vegan product and 100% organic from the next harvest, it has received numerous awards, including a double gold medal in the Sakura competition. The packaging was created in collaboration with the designer Nives Capellini, who was able to transform a painted bottle into a piece of furniture, giving even more value to the eco-sustainability of the family.

PERLAGE WINERY WWW.PERLAGEWINES.COM

"AFRA" PROSECCO DOC ROSÉ

The name Afra comes from the heart, it encloses a tender mother memory for the Nardi family. Afra name is also evocative and exotic, with a strong recall to the earth and its fecundity. This Prosecco Rosé is born out from the blend of the Glera and Pinot Nero grapes. It fills the glass with flower and fruity scents brought by the golden Glera but also with the elegance given by the popular Pinot Nero grapes. The Bottle with in relief details: present decorations with the golden oriole. This Prosecco Doc Rosé has elegant color shades that recall the feminine universe. It is organic and vegan. The packaging with strong references to nature and sustainability. This wine is ideal as an aperitif, paired with cruditè or in convivial occasions.

MONTELVINI WWW.MONTELVINI.IT

PROSECCO DOC ROSÉ TREVISO BRUT MILLESIMATO COLLEZIONE SERENITATIS 2021

Prosecco Doc Rosé Treviso Brut Millesimato, awarded by Falstaff Magazine as the Best Prosecco Rosè, thus beating off competition from some of the most important wineries from all over the world, is the result of the blending of a cuvée. The best Glera grapes (85%), harvested and vinified to obtain the Prosecco sparkling wine base, are blended with the best Pinot Nero grapes (15%) which are harvested early to limit the alcohol content and the amount of tannins in the wine. The juice is fermented at low temperature in contact with the skins for a few days to extract a limited amount of colour and only the most delicate and typical aromas of the variety. Once the two base wines have been obtained, they are blended to achieve maximum finesse and balance, always respecting the dictates of the production regulations. The cuvée undergoes the "prise de mousse" in autoclave, which, at the end of fermentation, involves a period of 70 days on the lees. At the end of this period of refinement on the fine lees, the wine is filtered and bottled. The wine is harmonious with the right balance between the freshness of the Glera grapes and the light structure given by the Pinot Nero, resulting in a creamy and persistent, savoury wine. Excellent as an aperitif, it finds its maximum expression with all raw and first courses of fish, delicate and decisive, it also goes very well with more or less mature cheeses.

CONTE COLLALTO WWW.CANTINE-COLLALTO.IT

"VIOLETTE" INCROCIO MANZONI 13.0.25 SPARKLING WINE ROSÉ EXTRA DRY

Conte Collalto's history reaches far back into the ancient past, with its first page written in 958, when King Berengarius gifted these lands to family ancestor Rambaldo. The Collalto family has always enjoyed an intimate bond with its territory, which as stewards the family has held intact down through the centuries; guiding the wine estate today is Princess Isabella Collalto de Cröy. With her exquisitely feminine sensitivity and strong commitment to environmental sustainability, she has preserved and developed unique grapes such as the Incrocio Manzoni varieties, created in the 1920s by Professor Luigi Manzoni right in the Collalto family vineyards. One of those varieties, Manzoni Moscato 13.0.25, yields a very distinctive rosé sparkling wine. Violette, dedicated to her daughter Violette, is an Extra Dry-style which must macerate on the skins for some 30 hours to achieve its delicate peony hue. That initial fermentation gives wine its effervescence as well, heightening the grape variety's classic aromas of rose petals, lime blossoms, and wild forest berry. The result is a delicately-sweet sparkling wine that is the ideal partner with traditional hors d'oeuvres and soups, as well as with lighter dishes of poultry and veal, and delicious with salmon. It stars as an aperitif wine. Best enjoyed at 6-8°C.

PINKPROJECT
THE THIRD COLOUR OF WINE

But rosé wine is not just a combination, it can be a perfect companion for intimate moments, dedicated to ourselves or with the right company, such as a sip of **"Aqua di Venus," Ruffino's Toscana Igt Rosé**, perhaps in front of a splendid sunset over the sea. From these waves can come also an important fish, such as the amberjack, that can give life to structured dishes. Cooking it in the oven with citrus fruits, makes in fact an elegant and complex dish, to be combined with **"Aurea Gran Rosé"** 2020, the **Toscana Igt rosé** of the Tenuta L'Ammiraglia di **Frescobaldi**.
Rice, again pasta and soups, are a great deal of tastes and aromas that combine tradition and innovation in the kitchen. Starting from the North of Italy, we can focus on complex preparations, such as a risotto based on Vialone Nano Veronese Igp rice and lake fish matched with the "Sogno Rossorosa" Incontro Manzoni 2.15 Colli Trevigiani Igt Rosé by Conte Collalto. Pasta, with sea urchins, for example, is the queen of summer tables, ready to go with a fresh **Bardolino Chiaretto Dop "Campo delle Rose"** from the **Ca 'de' Rocchi** company of the **Tinazzi family**.
Let's now dispel a certain rhetoric that says that rosé wines are always and only light: you can actually have more full-bodied and structured wines, when pairing with more vigor in the kitchen is needed. Lamb from Central Italy IGP, baked in a crust of aromatic herbs, perfectly matches the taste and tradition of **Cerasuolo d'Abruzzo Dop 2021 "Hedòs" by Cantina Tollo.** White meat, in this case a Rabbit all'Ischitana, takes us in the region Campania, with **"Ambra Rosa," Sannio Dop Aglianico Rosato Janare**, the special project of La Guardiense. Rosé wines are also suitable for fruit-based desserts: in this case important sugary residues are obviously needed, but the memory of the fruity and floral part of these wines, in their best versions, can perfectly match also apple or sour cherry tarts.

RUFFINO WWW.RUFFINO.IT

"AQUA DI VENUS" ROSÉ TOSCANA IGT

Vineyards: The grapes for Aqua di Venus come from vineyards located in the southern Tuscan Maremma area. **Soil**: rich in organic substances with an abundance of iron; clay and sandy soil. **Altitude**: variable from 190 to 250 meters above sea level. **Grape varieties** 38% Syrah, 31% Sangiovese and 31% Pinot Grigio **Vintage 2021** The quality of the grapes was excellent; the absence of rain in the first part of the season. was very positive for the ripening of the grapes. **First vintage**: 2019 **Vinification and ageing** The hand-harvested grapes are pressed gently in order not to lose the aromas. After the natural clarification of the must, the fermentation takes place in low-temperature stainless steel tanks, ensuring the maximum accentuation of the aromas and flavors. No malolactic fermentation takes place. The aging continues in temperaturecontrolled stainless steel tanks. **Alcohol content**: 13.5% **Color**: light pink. **Aroma**: the bouquet is complex with floral notes typical of Sangiovese, followed by herbal and Mediterranean brush overtones. The Syrah gives fruity red cherry notes, while the Pinot Grigio enriches this rosé with citrus and floral notes. **Tasting profile**: a fresh and savory wine with a balanced acidity. Long, lasting finish. **Why?** The blend made of Syrah, Sangiovese and Pinot Grigio represents perfectly the wild and sophisticated soul of the Maremma coast. As the world's best rosès, Aqua di Venus Rosè is produced in areas close to the sea. The vicinity to the Mediterreanean sea bestows interesting mineral notes, providing character and elegance. Produced for the first time with vintage 2019, Aqua di Venus got an immediate and impressive success. The wine quality, the refinement of the bottle and all the sophisticated details have provided a very appreciated experience.

TINAZZI WWW.TINAZZI.IT

CA' DE' ROCCHI "CAMPO DELLE ROSE" BARDOLINO CHIARETTO DOP

The grapes, 90% Corvina and 10% Rondinella come from suitable hilly vineyards in the Bardolino area. Grapes were harvested around the end of September with particular attention to preserving the balance between sugar level and acidity. Vinification is made through immediate gentle pressing in order to obtain the light pearl rose colour. Fermentation at a temperature of 14-16 °C for about 8/12 days. Maturation in steel follows. It is a soft, fresh and lively wine with a long finale with intense aromas of red fruit, in particular wild cherry, accompanied by floral notes. Recommended with light starters, fish, white meat, seafood risottos, summer pastas. It also pairs very well with more substantial, flavoursome dishes, thanks to the excellent acidity. To be drunk young at 9-10°C to fully appreciate the freshness.

FRESCOBALDI WWW.FRESCOBALDI.COM

"AUREA GRAN ROSÉ" TOSCANA IGT 2020

A rosé of the rarest elegance, its grapes hand-picked by an all-woman harvesting crew and produced at our Tenuta Ammiraglia. The estate, lying just 20 kilometres from the sea in the heart of Toscana's Maremma, boasts a stunning winecellar designed by architect Piero Sartogo that resembles a ship setting sail for the future, an eloquent symbol of innovation, and modernity, and avant-garde creativity. "The idea for this Cru was born one morning while admiring the dawn breaking over the vineyards of the Ammiraglia Estate. The faint rays of sunshine illuminating the Maremma coast inspired Aurea Gran Rosé, with the first vintage produced in 2017. This wine symbolises an estate where the sea and Syrah and Vermentino vineyards come together in perfect harmony, and where nature's elegance and balance thrive." Lamberto Frescobaldi. Aurea Gran Rosé 2020 is extremely elegant and bewitching; its crystalline and delicate color is characterized by brilliant nuances reminiscent of rose gold. It is an intense and deep wine with a complex bouquet. It starts with wonderful fruity notes, of nectarine peach, followed by a delicate hint of sweet spices, as well as toasted notes which almost turn into a caramel sensation. The palate is smooth and has a beautiful minerality and elegant acidity. Long, persistent and deep on the palate.

CANTINA TOLLO WWW.CANTINATOLLO.IT

"HEDÒS" CERASUOLO D'ABRUZZO DOP 2021

Cantina Tollo's Hedòs 2021 is the Cerasuolo d'Abruzzo Dop. Deep and bright pink in colour with violet shades, it is a truly multi-faceted wine, ideal both for a summer aperitif and to pair with a variety of dishes such as Adriatic fish soup, tripe, pizza Margherita with buffalo mozzarella, roasted white meats and semi-mature cheeses. The nose has subtle floral notes and delicate spicy nuances while the mouth is full, intense, smooth and long-lasting. Made from 100% Montepulciano grapes, the harvest, which takes place in October, is followed by cold maceration of the crushed grapes, pressing is soft and fermentation takes place at a controlled temperature in stainless steel tanks. Hedòs 2021 was awarded the Gold Medal at the Mundus Winter Edition 2022. It is part of Cantina Tollo's Iconic line, alongside wines that can be considered true symbols of this land, smelling of Abruzzo and telling its story, sip after sip. A pleasant and charming rosé, perfect for those who love these wines as elegant and fragrant.

CONTE COLLALTO WWW.CANTINE-COLLALTO.IT

"SOGNO ROSSOROSA" INCROCIO MANZONI 2.15 ROSÈ COLLI TREVIGIANI IGT

Conte Collalto's history reaches far back into the ancient past, with its first page written in 958, when King Berengarius gifted these lands to family ancestor Rambaldo. The Collalto family has always enjoyed an intimate bond with its territory, which as stewards it has held intact down through the centuries; guiding the wine estate today is Princess Isabella Collalto de Cröy. With her exquisitely feminine sensitivity and strong commitment to environmental sustainability, she has preserved and developed unique grapes such as the Incrocio Manzoni varieties, created in the 1920s by Professor Luigi Manzoni right in the Collalto family vineyards. One of those varieties, Manzoni Rosso 2.15, a clone of Cabernet Sauvignon and Glera, makes a one-of-a-kind rosé. Sogno Rossorosa derives its appealing deep salmon-pink appearance, in fact, from a brief cryo-maceration of the grapes before fermentation. This heady, youthful rosé almost explodes with ripe red berry fruit, intense raspberry and dark cherry, and delicate floral notes. This vivacious midsummer daydream will animate fresh cheese assortments, and light dishes of fish and meats. Best enjoyed at 8-10 °C. Research and evolution in grape growing and winemaking is of fundamental importance for us, and it is our conviction that Manzoni Rosso, vinified as a rosé, offers an interpretation of this variety that is modern in style and youthful in expression.

JANARE WWW.JANARE.IT

"AMBRA ROSA" SANNIO DOP AGLIANICO ROSATO

Janare is a special project of La Guardiense, one of the most important and well-established cooperatives in the Italian wine sector. The aim is to enhance the quality of local wine production with deep respect for primary resources. Valle Telesina is made by an extremely diversified terroir in terms of soil and morphology. The dual genesis, alluvial and terrigenous, involves the presence of sandy-gravelly soils of the terraces; young, docile, easily rooted soils. And then the ancient black lands of the marly hill. Ambra Rosa it is a complex Cru where the constant excellence of the wines derives from the winegrowers' ability to master and harmonies, year after year, the behavior of the vineyards on the different soils, slopes, and exposures. A sensitivity to all the variables of the natural circle of which the Janare were precursors. A Rosé Aglianico, soft and elegant like the fossil resin from which it takes its name, with floral notes and smoothie scents of raspberry and strawberry. It goes well with appetizers and seafood first courses or with grilled vegetables. Excellent on white meats and for adding a magical touch even to an aperitif.

IN THE VINEYARD AND IN THE CELLAR

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

ALBRIGI TECNOLOGIE

With "Planetarius" We Design The Future

PLANETARIUS CATALOGUE

PLANETARIUS VIDEO

The world of oenology is constantly evolving and Albrigi Tecnologie is always ready to offer new technologies to meet the various needs of wineries around the world. Today Albrigi Tecnologie offers a full range of systems and services made to save time, costs and energy for winemakers by increasing the productivity of wineries and ensuring the quality of the product. The new solutions that Albrigi Tecnologie proposes are all aimed at optimizing the processes of processing and winemaking of grapes, ensuring savings in labour costs, reduction of contamination and mishaps, going to limit costs and processing times. It is evident that the new systems proposed by Albrigi Tecnologie reduce time and above all are of great help to winery operators, the goal being to obtain maximum product quality from grapes, with minimum effort.
For this reason, Albrigi Tecnologie studies and builds grape processing and winemaking plants that are fully automated in such a way as to reduce labor and personnel costs by 70 percent with a 30 percent increase in productivity and a 100 percent chance of seeking maximum product quality. The Planetarius project is an obvious example of how it is possible to produce, optimizing processing costs as much as possible, while always keeping the production of high quality wines as the main objective.

BERTOLASO

Solidity, Evolution, Growth. The New Future Of Bertolaso

Stories of value always need new milestones. Bertolaso's entry into the excellence hub for enology created by the Investindustrial group, which incorporates all the companies of the Della Toffola Group, further boosts the bottling company's growth prospects. Joining the project in the role of leader in the bottling sector bolsters the ambitions of the company rooted in Zimella, Verona: the new phase represents the guarantee of greater international openness and financial solidity, also characterized by belonging to a large integrated group. The technical opportunities are in no way short of that. The new group structure brings together machinery manufacturers at the top of their respective businesses for the wine, spirits, and beverage industries – with each of the acquired companies ready to reinvest in shared development. Bertolaso will lead the bottling technology department, which has always been his field of specialty and innovation. Together with the prospect of increased reliability and responsiveness, being part of the group will enable it to provide a comprehensive response to customer needs at every processing stage. We are talking about an evolved, all-round offering system where solutions for production, distillation, filtration, and packaging are integrated with bottling. Competencies, dynamism, and goals are growing. A sign of acceleration is already present, with Bertolaso hiring new professionals for installation and assistance services in Italy and worldwide.

CMP

Plastic Sheet For The Storage Of Bottled Wine

Vinplast is a recycled plastic sheet-shaped for the storage of bottled wine. It is available in 12 sizes according to standard bottles, from Bordeaux to champagne. Vinplast is an alternative to metal cages and wooden boxes. Bottles don't rub each other, glass is safe and protected against any scratch or break, bottles are protected against light and the refinement process of wine is not compromised. Vinplast ensures space optimization in your cellars both in height and width. Vinplast, undoubtedly the best solution for aging wine in the bottle. More space, more security, cleaner, cheaper... and more. "In Vinplast Veritas."

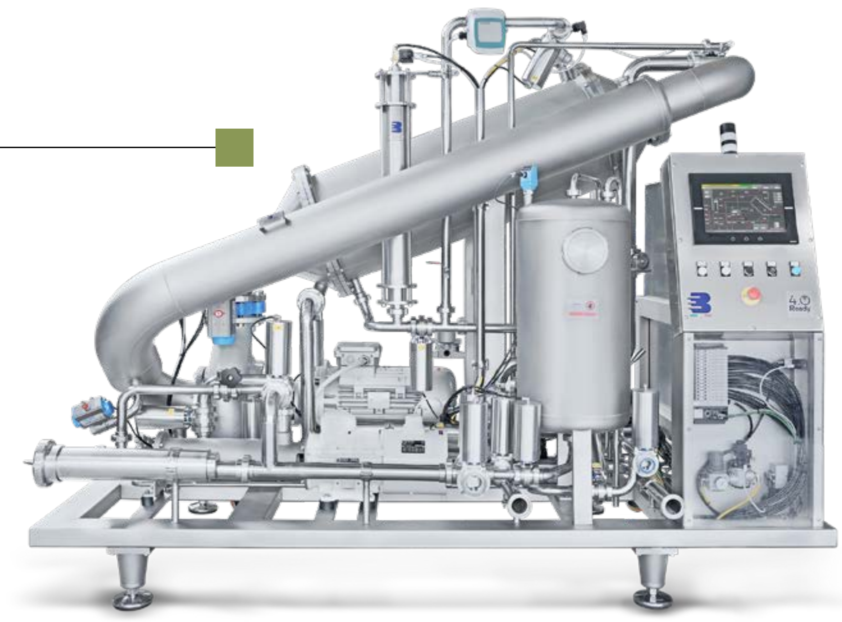
DELLA TOFFOLA

A Team Of Specialists For Wine World Technology.

Important news at Della Toffola Group, that with the acquisition of Bertolaso, Permeare and APE impianti (part of the Group since last December) completes its offer of products and machines for the wine industry, starting from the vinification and distillation process all the way to liquid treatment, bottling and final packaging. The group's integrated offer is configured as a 'one-stop one-shop' logic, which allows the company to present itself as a business partner for all production processes in the wine industry. Product competence goes together with process excellence and a new organizational structure that supports the group's value proposition and commercial proposal. The renewed organizational structure of the Group is based on four product business divisions: *Wine Making & Distillation*, that includes Della Toffola, Frilli and Permeare; *Bottling & Packaging*, which includes Bertolaso, AVE Technologies, Z Italia and APE; *Beverage & Dairy*, that includes Priamo Food Technologies, Della Toffola Beverage and Della Toffola Water Treatment; and *Tanks*, including Sirio Aliberti and Gimar. The Group, with its new organization, will be present at SIMEI and through its main brands will present its complete range of products, technologies and solutions for the wine industry.

ENOMECCANICA BOSIO

FTC 31/F Ceramic Membrane Crossflow Filter Born Eco-Friendly



As long ago as SIMEI 2013, Enomeccanica Bosio Srl managed to confirm its innovative nature once again by winning the "Lucio Mastroberardino" Innovation Challenge for its FTC 31-F crossflow Filter for lees and wine. Though little more than a prototype at the time, its revolutionary tilted housing containing the ceramic filtration modules was already making an impression. The innovative idea lay in catering for optimal feeding of the membranes from bottom to top, while at the same time removing any CO_2 from the fining lees. It was immediately clear that the FTC 31-F filter offered considerable versatility, combined with enormous technological potential. Huge strides have been made since then in terms of automation and hydrodynamics. The new filters are all Industry 4.0 compliant, and in addition to the patented "Back Pulse" self-cleaning system they also feature a further automatic anti-membrane fouling system for use on harvest deposits (Back-Purge). The degree of automation achieved allows the FTC 31-F filter to work 24/7, ensuring operational efficiency and safety by guaranteeing connection aimed at remote control and support. On top of all that, Enomeccanica Bosio never forgets its mission and that of its references, namely an obsessive focus on high-end product quality.

ENOVENETA

Automatic Plants And Industry 4.0 For Winemaking Sector

During the last years the requests about "Industry 4.0" production plants are increased. For that reason we've adapted our machineries to Industry 4.0 requirements. But we not only provide Industry 4.0 ready machineries, we can realize complete production plants with these requirements. Designing the entire plant, every technology will be integrated at its best. But it's not just about Industry 4.0. Now medium and big wine producers look for the total automation of the working process, in order to simplify the employees working load and also to have a more efficient management of the entire production process. We can find the maximum expression of this in the "FAP" (Full Automatic Process), a pressing system composed by three or more pneumatic presses that allows to manage all the grape pressing process automatically, from the grape loading to the washing of the presses. The "FAP" system is managed by a software that can handle autonomously all the working phases. The software, together with appropriate accessories like automatic valves, level probes, weighing cells and flow meters, allows to realize a fully automatic pressing centre.
Info: www.enoveneta.it

ERO

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

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

GAI MACCHINE IMBOTTIGLIATRICI

Gai, An Innovative Season In View Of SIMEI 2022

More efficient, 100% proprietary technologies, with a higher level of programming and customization. Solutions for both the bottling and the can filling processes to execute all the operations that speed up processing and improve the quality of the production cycle. At the upcoming SIMEI, hosted in Milan from 15^{th} to 18^{th} November, Gai Macchine Imbottigliatrici will be presenting interesting innovations, the most important one concerning the field of high-speed canning machines, a sector in which the company based in Ceresole d'Alba is becoming an increasingly important player at an international level. Gai aims at creating an entirely in-house technology, a machine for can closing with very high standards and noble, cutting-edge materials. In terms of proprietary technologies, Gai is moving towards a greater independence also in the labelling sector, in particular with the software for machine management: they will be 100% programmed by Gai engineers and they will guarantee a better integration with the mechanical part, as the engines efficiency will be radically improved. Even the famous UNICA electro-pneumatic valve, an exclusive Gai patent, is facing a new season. The R&D department is working on improving the efficiency and control of the filling cycle. The new UNICA valve will increase the parameterization possibilities (already very high in the current model) which will lead to advantages on the care and quality of the bottled products, potentially performing even better.

GARBELLOTTO
Garbellotto Introduces French Fiancée And Croatian Daughter

Garbellotto and Canadell families have shared the same passion for wood for ages, which led the two companies to form a partnership two years ago: they offer customers tailor-made barrels, like haute couture dresses. AnA's selection is accurate and based on terroir of French oak forests, which are 100% PEFC certified. Garbellotto expands its offer with a top of the line product, that respect the typical characteristic of every territory, guaranteeing the supply of French oak and affirming quality and elegance through the use of bi- and tri- centennial oak from the best central French forests. In the same way, Tonnellerie Ana Selection expands its offerings with our products, which stand out by made in Italy Garbellotto's quality for more than two centuries and in recent years are also guaranteed by NIR® and DTS® patents. We increased our investments in Italy and Croatia to support business development and internationalization process in 2018, when we acquire a sawmill in Slavonia with a forestry concession, which has now become the centre for cutting and splitting all the wood that is processed for the construction of our products. The sawmill stabilize the incoming market, as the cooperage is thriving and allow us to have FSC guaranteed certified oak. Garbellotto barrels require wood selected over the years and a stable supply of raw material. Since it has to be seasoned naturally in our service area, there's a need for lasting physicochemical stability.

MBF
Happy Birthday, MBF: 25 Years Of Sparkling Passion

Antonio Bertolaso, Anita Bertolaso and Giuliano Boscaro

Preserving tradition is a great responsibility. Turning the work of companies that give a voice to the great Italian wine-making culture into reality: such is the power of this tradition, that has made MBF a historical point of reference. In twenty-five years of research and innovation, this company, founded with a unique genetic wealth of commitment and ingenuity, has revolutionised the elements that define excellence in the production of bottling technologies. A family that turned its passion into a model of strength and great collaboration, using it to pave the path for spreading the ingenuity and the culture of the city of Verona beyond the borders of simple production, successfully tracing new innovative paradigms around the world. Siblings Anita and Antonio Bertolaso, together with the COO Giuliano Boscaro, are the face of the new energy that animates the drive to continuous research that MBF has been spoiling its many customers with for years. With a workforce of 165 employees at the large official production site in Italy (Veronella) and 55 in the branches located in Scotland, the United States, Argentina, and Spain, MBF stands out in the sector. Its mission leads MBF to understand the reasons behind the investment of those who are conscious of the constant change and rapid transformation that characterises a market such as this one. MBF looks to "tomorrow" especially by betting on the new generations that bring their own ideas and their passion to this sector. The most important notion emerging from the model adopted by this great Italian company is precisely what is closest to the heart of the people who do this job: honesty, loyalty and never forgetting our roots, so that we can preserve the very origins that enable every company to leave its indelible mark on the future.

METALUX
High Quality Capsules

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

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NORTAN
New Syncrocap Capsule Distributor

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

TMCI PADOVAN
The New Isobaric Version of Filter Dynamos

The isobaric version of the patented rotary dynamic crossflow filter Dynamos will be presented at the upcoming SIMEI 2022 exhibition. The new filter, in the Dynamos i7HP model, can be used for isobaric filtration of products with a high content of suspended solids or products that are particularly difficult to be filtered with the traditional crossflow filters. This version is aimed at all those who have been waiting for an isobaric version filter, especially the world of sparkling and fizzy wine producers, with the exclusive technical features of the Dynamos.