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THE FOCUS ON THE THIRD COLOUR OF WINE, AND ITS MAIN PRODUCTIONS, ARE BACK

ALL The Many SHADES of Pink

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Not Only Provençal
The Market for Aged Wine
PAGE 3-5

PAGE 7-10
Oak To Increase the Nuances of Pink Wines
What Does the Future Hold for Abruzzo'S Cerasuolo?

Increasing Volume, The Spanish Way
PAGE 12

PAGE 16
Why Do Canadians Drink Less Rosé?

PAGE 14
China, the Future is for Darker and Not-Too-Expensive Wine

PAGE 17
The Short Nordic Summers Don't Stop the Pink Trend

NEWS FROM THE U.S.

CHANGES IN THE MARKET

Some Decline in WINE SALES
PAGE 18

TWO LAW PROPOSALS IN NEW YORK STATE

Independent Wine RETAILERS FIGHT to Protect Their Turf
PAGE 19

SAVE ACT PROPOSAL: THE DEBATE ON GEOGRAPHICAL INDICATION PROTECTIONS AND "COMMON NAMES" IS BACK

IS A NAME Worth Dying for?
PAGE 20

Japan Thirst for Sparkling Wines
page 22

South Korea Has the Wine Bubble Burst?
page 24

WORLD WINE IMPORTS IN Q1, 2023

Still DECREASING

WINE OBSERVATORY

The trend is worsening for packaged still wines (-7%), while sparkling wines are down 5%. China is still in sharp decline (-40%), the US is stable, and the UK and Canada are dipping into double-digits

>> page 34

Sustainability in NORWAY: Social and Environmental Objective
>> page 26

HISTORICAL VINEYARD: Grapevines on Walls, Living Monuments of our Viticultural Civilisation
>> page 29

International Women's Day: AN AWARD to the Wine Women in Mendoza
>> page 37

THE FOCUS ON THE THIRD COLOUR OF WINE, AND ITS MAIN PRODUCTIONS, ARE BACK

ALL The Many SHADES of Pink

By GIULIO SOMMA AND FABIO CIARLA

Maybe for its many shades of colour, its versatile organoleptic structure or the many consumption occasions, rosé wines are the most adaptable nowadays to the wishes of consumers. It is a type that knows no crisis, but that undergoes, in some markets, the image of a secondary, fall-back wine. If we take out France, we still need to talk about a "niche" that is growing steadily and still has unexpressed potential, as the focus on elevage in wood and ceramics to create super premium products, shows

Flexible and versatile, rosé wines are good for any occasion, from simple get-togethers to more gastronomic wine pairings. Although not new to the wine market, rosé comes in an almost endless variety of shades, which is perhaps the most interesting thing about "pink" wines.

Taking a closer look at what is happening in the world, the versatility of these products is not enough to explain their commercial success. In fact, rosé and sparkling wines are the only two categories that still seem to be enjoying growth, while whites and reds are facing a noticeable slowdown, not to mention sweet wines, which have been struggling for years now. The hype around "pink" wines is hence pushed both by their multifaceted nature and a global cross-cultural trend.

In the past pages of *Wine World Magazine* we dealt with the topic of VIP wines, which were almost all rosé, and we briefly tackled the importance of colour in phenomena that go far beyond wine. These types of wines can be found in a wide variety of contexts and can serve as a gateway for consumers who do not usually drink wine but who, on certain occasions, can enjoy their easy, unpretentious character.

In this issue, we will focus on "pink" wines by looking at what the main producing countries are doing and by surveying the markets leading the trend.

The overall, worldwide production of rosé wines now hovers around 23 million hectolitres, accounting for about 10% (UIV Wine Observatory data) of the still wine segment. France, Italy and Spain, the three main producing countries, operate according to very different production models. The Iberian Peninsula exports the largest quantity of rosé wines in the world, followed by France counting an impressive percentage of top rosé wines. Meanwhile Italy, standing in third position, still maintains a wide diversity of pink wines, equally divided between tradition and innovation.

These three European countries alone are responsible for just under 70% of the world's total exports of rosé wine, with Spain holding 31% of the market share, France 22% and Italy 16% (UIV Wine Observatory data).

The issue with Spain is with value and data collection, since "pink" wines don't have a classification of their own, simply falling under the red category. To bypass the problem, it is possible to rely on data collected by the various Denominations and research centers (Nielsen) focusing on domestic consumption and by tracking Spanish rosé exports recorded by various countries buying these wines. This lends to a proper classification of their wines based on colour. Yet these numbers are far from complete given the large amounts of bulk wines coming out of the Iberian Peninsula. In short, they focus on a high low-quality production, contrasting sharply with the French model of producing important volumes of quality rosé namely from Provence. In fact, the region has become a reference for style for rosés around the world (similarly to Champagne until recently).

The French drink and export a lot of rosé wines, including expensive ones that mostly follow the Provençal style (pale tones and delicate flavours). Yet they are also rediscovering their traditional productions, from Bandol to Tavel, giving new luster to oak-aged rosé. It's a practice that aims to position rosés on the top end of wine making, both in terms of price and pairings.

Italy, as is often the case, is juggling between traditional and modern production models. From Puglia to Lake Garda, via Abruzzo, the nuances and styles of "pink" wines differ greatly, making it hard to effectively promote a unique style easily recognizable around the world. Aging in oak and ceramics confer more prestigious wines able to fetch higher prices, yet they represent a niche market within a decidedly minority category. With Cerasuolo d'Abruzzo, a "light red" by tradition since it is the colour of a ripe cherry (Cerasuolo meaning *cerasa* or cherry), there are winemakers reinterpreting it using a modern twist, lightening its colour and structure.

Mixed signals are coming from foreign markets: rosés are still very popular in some regions such as Scandinavia, while other places are showing some promising growth opportunities. In areas that tend to be very cold like northern Europe, the consumption of rosés and the lifestyle around it is related to a hunger for summer that is pushing the consumption of a wine reminiscent of flowers, sunshine and the sea.

Canada, on the other hand, seems to have summers that are too short to incentivize a proper rosé consumption. Rosé is a typically seasonal product struggling to establish itself as a premium wine to be consumed year-round.

Finally, the Chinese giant is still figuring out a proper definition of its own market, and rosé remains a very small niche, although showing promising growth potential. The Middle Kingdom is notorious for heavily favouring red wine and darker rosés therefore tend to perform better although they remain mainly associated with entry-level wines.

This important market hindsight, which we have compiled in a thoughtful collection of articles, provides a useful tool for wine operators around the world. In the difficult times we are facing, we need to have the ability to discover and seize market opportunities, while hoping the recovery in consumer spending everyone's been waiting for will return soon, although it doesn't seem close when looking at the macroeconomic figures.

GOOD NEWS FROM MANCHESTER: FREE ROSÉ SERVED AT THE PERFECT WEATHER TEMPERATURE

Residents of Manchester have been able to enjoy two days of free rosé thanks to supermarket chain Aldi. The British shop decided to promote National Rosé Day, celebrated on June 10, with a punchy initiative that engaged passers-by to take part in a two-day pink fest.

A large sign with a dispenser began serving free glasses of rosé when the temperature outside reached 19.2 degrees Celsius, the ideal threshold for enjoying this type of wine.

The event was the result of a consumer research carried out by Aldi over the last few months, which identified the North West of England as the "UK's biggest rosé drinking region." The ideal temperature for drinking rosé, which occurred at around 1pm in Manchester on June 8 and 9, was established precisely on the basis of a survey of 1,000 drinkers.

The study also revealed that two-thirds of those questioned described rosé as the "perfect summer drink" and that almost half of them described it as "best enjoyed in shorts and a T-shirt".

As for the best way to serve it, 55% of those questioned thought it was acceptable to add ice to their glass when it was hot, while 45% said they preferred not to 'dilute' it.

The study also revealed that rosé drinkers will consume an average of 63 glasses of wine over the summer and spend £11.34 per bottle. The ideal time to enjoy a glass of wine is around 5.15pm.

France

AN EXTREMELY INTERESTING NICHE MARKET

With rosé wines aged in wood and "Rosés de terroirs," the French production is much wider and varied than expected and includes wine areas like Bandol and Tavel, Châteauneuf-du-Pape, Monbazillac, Arbois, Cassis and Les Riceys in the Champagne region. It is still a small trend, but ready to go bigger alongside with Cerasuolo d'Abruzzo in Italy and Cigales in Spain

NOT ONLY Provençal Rosé

By **CHRISTOPHE ANDRIEU**

Many trends and new markets have been worked out in France. Over the past two decades, rosé wines have been a remarkable success. Impulsed by producers from Provence, this market really doesn't know what the word "crisis" means. In 2002, 19,6 millions of hectolitres were sold in the world, now it's more than 24 millions. Now, one bottle out of ten in the world is a rosé wine. And most of the bottles are sold the year after the harvest. For some years now, a new trend has been emerging. Sometimes called "aged rosé wines" or "laying down rosé wines," this new kind of rosés may be also named as "Rosés from terroir," if we refer to some specific production or even as "gourmet rosé," rosés specifically designed for wine food pairing. But this trend looks more like a very specific niche market not in competition with the other rosés, but probably more with some white or even some light-bodied red wines.

When it's time for the rosé wine, in France and probably in many other countries in the world, you're thinking about the sun, Mediterranean sea and the Provence wines, the rosés of course, for a valuable aperitif. Undeniably, rosé wines have been tailored there, in this typical area from south east of France. Blind tasting never lies. A Provence rosé is always a freshness bomb, with typical aromas like exotic fruits, lichee, pineapple, a lot of citruses and a notable salinity at the end with some nice bitter final tastes, usually with some wonderful grapefruit notes. Frequently, these pellicular maceration wines are in the bottles only 3 or 4 months after the time of harvest and most of the wines are drunk during the following summer. Everybody knows how short this famous cycle is, with prices usually around 10 Euros for a single bottle.

If this specific market is now a very mature one, copied approximately everywhere it's possible to produce rosé wines, there is a new trend which seems to emerge. Indeed, for the last years, new rosé wines have been made, the aged rosé wines or "rosé from terroir," sometimes also called by producer himself and sommeliers as well the "gourmet rosé wines," perfect for some new wine food pairings. And when we're talking about rosé wines, the based Centre of Rosé Wines in Provence is obviously the first to provide some clarifications about these new concepts.

A Good Definition

"Yes, but first of all, there is a question of semantics," said **Gilles Masson**, French director of Rosé Wine Centre. "As a scientist, to be more relevant, I should try to describe the topic and contextualize what we are talking about. Is it a question about the elaboration of a wine, its temporality or a matter of its origin? To be honest, a lot of things we are able to hear nowadays look like an opposition to the predominant rosé wine, I mean rosé wines from Provence. It sounds more like a counter proposal."

So, in a way could it become a problem for rosé wines from Provence which have built what we can name as a real template?

"No, in Provence, we are open to all kinds of rosé wines," Mr. Masson said. "In our region or elsewhere in the world. But, if we want to build something else, just to be in opposition with rosé wines from Provence I think it's not enough. Before, we have to determine precisely what we are talking about."

If Provence rosé wines have succeeded to sell their wines everywhere in the world it's also because they were very precise many years ago. They wrote about a way to follow and built the tools they needed to reach their goals. So, to try to speak about these different rosé wines, could we talk about "long keeping rosé wines" or "aged rosé wines"?

"I disagree with it," Mr. Masson continued. "I don't think it's a good term. Firstly, it's not very fair to take some words usually used for the red wines. But I can understand that some rosé wines can be expected, more than this, can be desired. This is interesting, indeed. But, how much time are we talking about? With what kind of elaboration? When we are talking about aged wines, we are hoping that the wine will be better. But when, a year after? In three, five or even ten more years? If we want to make such rosé wines, how do we make them? Actually, I don't have any answer."

It's easy to imagine that this strict scientist doesn't find the right explanations in some more commercial speeches supported by marketing services.

But, if we are talking about specific rosé wines aged in wood, "It's kind of an ancient reflex," Mr. Masson said. "Like for the red wines, we are inviting oak-aging. Why not? It may be interesting. The wood is able to give some new aromas and new flavours too. With oak-aging we are also able to provide some early oxidations. But wood isn't the only way to think about aging a wine, specifically for rosé wines. And it's not only a matter of aging. These kinds of wines must be conceived with the varieties choices, the date of the harvest or the way to ferment. An aged rosé wine must be conceived far before aging."

As a very productive information centre (many scientific studies produced every year about markets, colours, evolution, etc…), rosé wine centre's opinion is always a very interesting one.

"Many things are done on the field," Mr. Masson explained. "It's interesting, somewhat complex but the question of this kind of rosé wine should be more precise in the future. Actually, I'm unable to evaluate the opportunity of this kind of wine. But we have to keep in mind that rosé wines are free. This colour of wine might continue to prospect, to continuously try to reach the will of the consumers even if consumers want to drink more aged rosé wines, six months or even more after. But I don't believe the approaches we had until now are the good ones."

Talking to Gilles Masson about gastronomy or gourmet rosés is definitively almost quarreling.

"It's an excluding expression, isn't it?" he asked. "It's quite a dividing term. Does that mean that, in Provence, we are only doing rosé wines for the aperitif? Actually, wine makers from Provence are producing a lot of 'atomic bombs,' we probably have never made so many good rosé wines. So it could be difficult to hear that these wines might not be gastronomic wines as well."

That's it!

A Small Market With Very High Value

As Provence is the famous place for rosé wines, let's stay there, in the south east of France, to look at some aged rosé wines. For some years, great wineries have begun to age some of their rosé cuvées. Château d'Esclans (the famous one bought by LVMH group) have done it with some esoteric high prices (around 115 Euros per bottle). By tasting these kind of wines, it's obvious that these rosés are more vinous, slightly better than the normal vintage but the prices mean that it's only for happy few and for the same price you may have a complete box of very fine rosé wines or some very very good white or red wines as well. To have a good rosé wine from Provence with a long aging process and a reasonable price we have to look at famous Clos Cibonne with a producer fascinated by oak aging for a very long time.

In the Provence region, there's also a smaller but very famous appellation too, Bandol. Previously, this lovely place was only producing some very good red wines mostly based on Mourvèdre – and still well reputed. Of course, in this place, which is also a very touristic one, it's now been more than thirty years that wineries are producing mainly rosé wines. Consumers wouldn't understand that between Marseille and Toulon a so beautiful ap-

Gilles Masson
©agencecameleon

Philippe Chauvin

pellation wouldn't have its own rosé. And the result is very, very interesting, and somewhat different from the nearby rosés of Provence. Bandol rosés have immediately been identified with their own personality. And with these Mourvèdre based wines, the "idea of aging our rosés wasn't so extravagant, recognized **Philippe Chauvin**, from Font des Pères wine estate, which produces 55000 bottles a year (30% of rosés, 50% of red wines and 20% of white wines).

"Our emblematic variety, the Mourvèdre, encourages the aging process," said Mr. Chauvin. "It's not a huge surprise here in Bandol. Many other producers, some of them very famous, are making very good aged rosé wines and we already knew that they can go through ages." To name a few, La Begude (22 Euros) or Château Pradeaux (24 Euros), are on the top of the list.

What is quite surprising with Philippe Chauvin's wines is that there's only one way of making its wine.

"We are not making a wine to be drunk during summer and another one to be drunk some months or even years after," he explained. "It's the same wine. In fact, we discovered in 2015 that some of our older rosé wines were still fresh and interesting with some new aromatic notes. Now, we are keeping some bottles apart. With only one wine we indeed have two wines."

We're not sure that this ability can be transposed everywhere and there might be a great secret behind this, but which one? "Our main secret is our variety, the Mourvèdre," said Mr. Chauvin. "Without this kind of grapes, it would have been impossible to produce some structured rosé wines."

By Font des Pères vineyard, 15% of the production is vinified under oak, in barrels mainly.

"We don't want to smell the oak aging in our wines," Mr. Chauvin explained. "We do believe it's important but it should be done slightly. And for us, it's important to take time. The Rosé wine market is like an absolute tyranny of the year. Everybody wants to produce their own rosés as soon as possible to be able to sell them very quickly on the export markets. We decided to take a different way because we prefer to make our bottling by March and sometimes by April, if necessary."

In Bandol AOC, it's forbidden to bottle the wine before the end of February. If such producers (those from Bandol are quite famous) are making aged rosé wines, probably does that mean that these new rosé wines have a market and, why not a future as a new trend

"Mais no!," answered Mr. Chauvin. "It's a niche market, only and simply. And it's not necessarily a matter of consumer's tastes. Most of our wines are sold at our wine estate, by selling at our own shop or in the restaurant. We are making a lot of tasting sessions with our clients. Usually we do blind tasting of our rosé wines. For e.g., this year we did it with our 2022 cuvée and with the 2019 vintage. Most of our clients used to prefer the older one. And when we were talking with them we understood that they really did prefer aged wines, even for red wines. Those who only like rosé wines on the freshness and fruity side still do prefer the younger one."

This approach is quite interesting because that means it may be possible to transpose the natural tastes of consumers to a real market.

"That could be," Mr. Chauvin said. "But that could be only if the professionals do the job, I mean if wine shops or sommeliers want to do the job. But it doesn't work like this. Most of them are lazy and follow the markets and their habits. There's quite an intellectual laziness. It's easier to sell every year the rosé of the year and then to say that it's a consumer's choice. That's not true. When you make the blind tasting, consumers do prefer the aged rosés. But we are only producers and we are not really making the trends."

Of course, an aged rosé wine is quite different from a rosé of the year. How could it be easier to describe them?

"It's very simple," Mr. Chauvin asserted. "Young people are bright and old people are well-rounded. It's the same for the rosé wines. The oldest wines lose some fruit and acidity but gain a lot of complexity."

With such a definition, we may also consider that more structured rosé wines could be in competition with some red wines, a decreasing market.

"I'm not sure, it depends," Mr. Chauvin elaborated. "In our appellation, entry level wines, I mean under 10 Euros, it's finished. But there are still great markets for our upmarket red wines, with a price of 35 Euros per bottle. So I don't think that rosé aged wines will replace some red wines. It's a new trend but only a niche market."

And as the owner of Font des Pères was involved long ago with caviar, he just wanted to add his favourite wine food pairing.

"Caviar and a very good aged rosé wine is simply divine," he said. "Or you may try some exotic food, too."

Rosé from Terroirs

Besides the tiny trend of aged rosé wines, even in barrel or not, the French market began to get acquainted with a new name or brand, the "rosés de terroirs." On the French map of AOC, the first five ever were Arbois, Cassis, Châteauneuf-du-Pape, Monbazillac and Tavel. Based in the south of the Rhône Valley, in the Gard department, the last one is very emblematic of what was a rosé wine before the huge marketed light coloured rosés from Provence.

"It's an historic birthplace of the rosé wines in France, said **Guillaume Demoulin** from Château Trinquevede, who is also president of the appellation. "Our way of working is making more wines that used to be clairets or even light red wines but it's also a history of rosé maceration wines. In Tavel, we always choose the maceration rather than direct press. Above this technique, our 900 hectares appellation is also well known for its terroir, worn pebbles like in Châteauneuf-du-Pape, a second one of lauze, typical limestone from our region and the third one constituted with typical sands and clay."

With a long tradition of assembling some varieties (consult, clairette, Syrah...) besides the grenache, Tavel has built a great reputation for rosé wines for a very long time.

"Most of our vineyards are bio certified," said Mr. Demoulin. "It's been a long time since we have been working our soils to put a natural acidity into our wines. Usually we harvest with a high maturity. All of this provides the taste of our terroir. After 24 hours or 48, even 72 hours sometimes, we retrieve the free-run juice and we add it to the press-juice. That's why our wines are more or less vinous. » And why the colour is so pronounced (intensity has to be between 0,5 and 3, considering that usual rosés wines are below 0,5)."

Of course, with the incredible impact of Provence style rosé wines on the markets, their pretty much coloured wines (like Cerasuolo d'Abruzzo in Italy or Cigales in Spain) were not so sexy and trendy.

"Naturally, we were different," said Mr. Demoulin. "The question wasn't to stop our recognized know-how, it was more to answer the question how we can face this competition? So, we decided to co-opt wines from appellations with same philosophy."

And here began, ten years ago, a new association of "rosés de terroir." Very quickly, Tavel winegrowers found some other different rosés in France, like in Bandol or in the Riceys, a very interesting village in the south of Champagne. Now, rosés from approximately everywhere try to be co-opted, even from Italy (bardolino chiaretto and Sicily). The very septentrional wine region of Toul (not far from Metz !) Provides also some wines actually. Guillaume Demoulin has been proud to be co-founder of this new organization.

"We are not co-opting complete appellations, or wine estates," said Mr. Demoulin. "We are only co-opting cuvées. It means a winemaker may have one of its wines as a 'rosé de terroir' wine but may produce some other wines even, why not, very light rosés. It's not a problem. Our expert jury is only judging a cuvée for its own abilities. If it gives emotion and originality, it's a good point. If the job is well done, we can co-opt the cuvée and continue to defend different rosés."

Through the association, a lot of winemakers have been able to exchange their techniques. And they also may have talked about the aging rosés wines.

Of course, "rosés de terroirs" may be rosés wines from the last harvest but, indeed, a lot of producers are pretty much involved in the aging process too.

"I have one of my rosé cuvée in an aged-style, les 'Vignes d'Eugène,'" said Mr. Demoulin. "I already tried the fermentation process in half muid but usually for my aged rosé I do prefer a long maceration than a malo lactic fermentation in half muid after fermentation and a long aging of twelve months."

As for this kind of cuvées, it took some time to find the perfect result.

"In the beginning, I found too many oak flavours," he continued. "I'm not sure aged rosé wines need a lot of oak. Concrete and ovoid vat are perfect too. And those who think that aging a rosé wine in oak is enough to have a perfect aged rosé wine are making a huge mistake. Now, I produce the aged rosé wine I wanted to have. It has lost some freshness and fruits of course but it has gained a lot of complexity and profoundness. Part of the wine is aged in half muid and the other part is aged in egg containers. Malo lactic fermentation stabilizes the wine, giving a full rounded body for a wine soft and full."

Such a perfect job on a rosé aged wine might help it to live longer. But how long? "It's somewhat uneasy to say," said Mr. Demoulin. "We don't have the same tannic structure as in a red wine. To be accepted in our 'Rosé de terroirs' association a new member should first bring a cuvée older than one year at least. Usually, the new producers bring some 2 or 3 years aged cuvées and the tasting is incredible. I also remember a new winegrower who came with a 10 years old cuvées from the Riceys. In Tavel we didn't used to keep our wines so long but why not, let's see. We are beginning the process. Ideally, it would be great if we can share the keeping process between producers, wine shops and even consumers but it won't be easy to explain."

And here is the real issue. What are consumers and sellers about these rosés wines?

"Ten years ago, it was a complete niche market, known only by very few people," said Mr. Demoulin. "Now, I think it is changing a little bit. A new generation of wine merchants and sommeliers is coming. They go for it more easily than the previous generation. Some sommeliers are fascinated by the multiple facets of our typical rosés. They do like their complexity and sometimes it's a good answer in terms of wine pairing. Our rosés wines are tailored for gastronomy."

Guillaume Demoulin

A specific Rosé from Champagne

Of course, Bandol or Tavel are specific AOC in France with a great history and some rosé wines very well identified. But, in the septentrional part of the hexagon, another appellation is at least as emblematic of the two others. Called Les Riceys, this 300 hectares Aoc is based in the eponym village which has a very specific particularity because it's the only village in France that has no less than three different Aoc. Besides the specific rosé wines, the village based in the south of Champagne (very close to Burgundy) is also able to produce sparkling wines of champagne and also red wines named as "coteaux champenois." But when you arrive in the beautiful stone-built village (the careers have been used to build Versailles castle), you immediately think about the famous rosé.

"It's part of our history," said **Arnaud Fabre**, from Champagne Alexandre Bonnet. "As far as we know, there was always this kind of wine there and when the dictionary officially published something about the rosé wines in 1680, it said it was the colour of the flower and by this time it was only a dark coloured flower. It wasn't a pale one."


Arnaud Fabre

In the quiet Burgundian part of the Champagne, rosé from the Riceys is the DNA of the village. "For a long time, it's a great wine, a gourmet wine and able to be aged and to be kept aside for long," he said. "Some weeks ago, we made a tasting in Vinapogée with six vintages of our rosés from 1980 to 1999. Everybody has been awed, nobody can believe it was so old vintages for such rosés wines. That's what we can do in Les Riceys, rosés able to go through the ages."

Naturally, in this region, conditions of viticulture are not the same and wine makers are doing things differently too.

"Actually, most of the pale rosés are directly pressed," Mr. Fabre added. "In Champagne, we used this method for the sparkling and we call it 'blanc de noirs.' For our rosés, we do prefer to make a complete maceration with complete bunches during 3 or 5 days, usually 4 days is a good average. With this method, it's better to extract the skin tannins, to take all the depth and the expression of our terroir, to have a complex and profound wine. That's why we have such a colour."

After the fermentation time, "we usually age in tank the free-run wine (80%), also called saignée and the press must (20%) is aged in oak," he continued. "We proceed like this to raise the tannins in a softer way. Then we blend our still wine and after summer we age our rosé wines in bottles for one or two years. It means that a rosé wine from Les Riceys begins to be sold 2 or 3 years after the harvest."

That's a process which is a rarity for an Aoc. Of course, the appellation is definitively not so big and less than 30 producers are making rosés for an average of 50000 bottles a year.

"And we are 30 to make rosés in the good years, but when the harvest has been more difficult we are only 4 to produce our rosés," Mr. Fabre said.

Naturally, in this region, it's quite easier to produce juices for the pretty much notorious champagne. It's quite an achievement to produce a rosé there.

"But we are proud of it," he insisted. "It's a rarity, a tradition, a culture we have to defend."

Locally, it's easy to understand. All the restaurants have their Riceys cuvées and inhabitants of the region wouldn't drink another rosé wine.

"Now, we also have some very interesting markets," Mr. Fabre explained. "Of course, it's quite confidential, but some sommeliers, beyond the most famous, are very interested in our wines. They do like our pinot noir from champagne made on more Burgundian soils and, more precisely, on kimmeridgian soils like in Chablis. That's why our wines can be defined as gourmet ones. They are fruity, well equilibrated and with such a verticality and minimality at the end. Even if this rosé remains a rarity, year after year we are producing more and more bottles."

And very logically, a lot of Riceys producers are now involved in the French association Rosés de Terroirs.

Should we say it's a real trend? Probably not. It's a treasure of diversity. Very few appellations or producers are able to really age their rosé wines. And if there is no specific definition of these kinds of aged rosé wines, it's probably because they are still too confidential. Some connoisseurs will be lucky to taste and drink them. But we can bet that the mass market will continue to promote rosé wines of the year, mainly with pale robes and with "Provençal" style.

Producers to the south east of France can go to bed safely. The model they created many years ago still seems to be the strongest one.

THE MARKET FOR ROSÉ AGED WINES

The HAPPY Few

On paper, the idea of rosés wines with better structures and more complexity sounds good. But, on the field, it seems that nobody wants to play with such aged rosé wines, except some happy, few connoisseurs or some sommeliers who want to show how to manage a well done food pairing

By **CHRISTOPHE ANDRIEU**

In terms of rosé wines, France is well reputed. First producer (28% of the 26,4 millions of hectolitres per year), first consumer (34% of the whole production, and that's why France is also a great importer of rosé wines), this twenty years old French success story is also full of story-tellings. Of course, everybody knows about the Provence style of rosés wines based on the wonderful triptych: freshness, aromatic and pale skin. And the last one is a kind of golden key. More and more translucent, year after year, the rosé wines from Provence impose the tempo of the production. Everywhere in the world, a lot of producers seem to be fascinated by this clear colour. The consumers also.

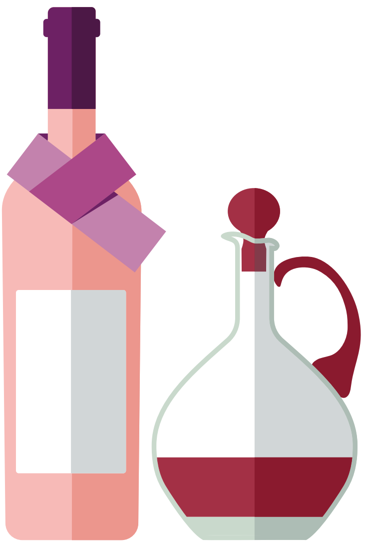
But in such a mature market, it's evidence that some new paths or ideas may have their own success, too. For some years, a new topic is on the table, the aged rosé wines, in oak or not, something we are also able to name as worth keeping wines. If we are referring strictly to the history of wines, it's obvious that we already had in the past these kinds of beverages, known as clairets. But the topic is a little bit more different nowadays because some producers and appellations are making their rosé wines with some abilities to be aged while trying to keep some parts of the freshness and popularity of the rosés wines. Some very famous producers from Provence or from Languedoc are making expensive rosé wines (from 25 to 60 Euros even more for the Gerard Bertrand iconic rosé at 200 Euros per bottle), mostly sold in very nice restaurants or in the US market. And in France, what does this market look like, in shop retails, GDO or restaurants?

Less than 5%

First, if we consider the numbers of the sales, it looks like that rosés of the year are naturally the most sold with approximately 56% of the whole sales. But it also means that older rosé wines are representing 44% of the total sales. Equally, rosé wines of the year before (22%) and the rosé wines even older (22%), are in the same position. In fact, this first look may mislead us.

Alexandre Martorana

Audrey Brugière



Cyril Coniglio

Most of these wines older than one or two years are concerning the Gdo and approximately all of them are concerning bottles which have not been sold the year before. In this case, we are not talking about aged rosé wines produced to be sold that way, but mostly about poor sales wines. It's quite difficult to pin down the exact numbers of aged rosé wine sales. That's why we asked the biggest French independent wine shops (Federation des Cavistes Independant) which made a poll for us. At least 30 wine merchants from all over the Hexagon answered us. And the result is quite clear. More or less, the aged rosés wines are below 5% of the rosé wines sales.

"We don't have such demands for these aged rosé wines," said **Stephane Alberti**, first cellar man national winner in 2014. "For our clients, a rosé wine is clear, fruity and might be from the last vintage. That's all. Nobody asks me for aged rosés."

Another cellar man from Toulouse, Julian Pallaruello, agreed that "A rosé wine must be under 10 Euros with the lightest colour."

A fact completed by **David Morin**, the last French champion cellar man.

"The most sold rosé wines are delectable wines with prices between 9 and 15 Euros," he said. "And most of them are coming from Provence."

Laurent Pignot from Issoudun said that "Like everyone else, I sell mostly rosés from Provence between 10 and 15 Euros from the last vintage and I never noticed any demands on more vinous rosés."

These kinds of appreciation are shared by approximately all of the 30 cellar men who did answer the poll.

And **Cyril Coniglio**, the president of the Federation des Cavistes Independant and also best cellar man in 2018 added that "Our clients never ask for these kind of aged rosé wines. They definitely do prefer light wines, why not with an ice cube in the glass close to the swimming pool. But it may be our job to suggest that they taste some structured rosé wines as well. Personally, I found that a great Bandol with 3 or 4 years can be wonderful rosé wines. They can become a very good ally to some grills in terms of wine food pairing."

In his cellar, Mr. Coniglio can show off his rosés, some aged rosé wines and some more colored ones. "But it's no more than 2%," he said. "Mostly, our clients want to buy a clear wine but also a cheaper one. When we are talking about aged rosé wine in barrels, the price is always more expensive, 15 Euros at least. For this kind of price, consumers do prefer to buy a more famous white wine or a light bodied red wine."

Before creating his wine shop in Pont-de-l'Isère (south of Rhône valley), the actual FCI president was sommelier in a famous three stars Michelin near the Castellet circuit.

"There, it was possible to sell at table some nice aged rosé wine with interesting wine food pairings," Mr. Coniglio said. "For the clients it was quite an interesting experience but they had enough money to taste these kinds of rosé wines."

Blind Tastings

So, there might be a life for aged rosé wines in restaurants, the nicest one probably. **Audrey Brugière**, became a famous young sommelier while she won some great trophies and has been very quickly recommended for her talents in some great Parisian restaurants (In the one-star Michelin "Origine" first, then in the two starred Michelin "Clarence"). She just gave up from the Champs-Elysées restaurant before leaving to another great place somewhere on the road to her native South as she's originally from Provence.

"It's not because I'm from this beautiful region that I only like light rosé wines," she said. "In fact, I really do prefer the more coloured ones. When I came to Origine, there were no rosé at all in the cellar. Parisian clients of this kind of restaurant couldn't think they were able to drink such wines there. But I changed the cellar and the habits of consumers. I began with some small boxes and then I ended up selling rosé wines throughout the year."

Of course, rosés from the last vintage were easier to sell but as a young and very involved sommelier she tried new things on some wine food pairing menus.

"I had a special trick to place some aged rosé wines like some Château Simone from Palette or Clos Saint-Vincent from Ballet or even some Susucaru roast from Cornelissen," Ms. Brugière said. "I've decided to use some black glasses."

And the result has been astonishing. Most of the tasters thought they were drinking some white wines, very few were even thinking of light red wines but most of them were really surprised when they discovered it was rosé wine.

"Usually, when they didn't finish it, I poured them another clear glass and they were amazed about these wines," she said. "It worked very well with lobsters or langoustines. And I like it also with some meat, specifically veal tartare. One day, I was even prouder because the owner of Château de Sannes was seated at one of our tables and he looked at my blind tasting trick while serving his wine. He was really amazed. I think it's a very good way to change the opinion on these wines."

As a fine connoisseur of all the rosé wines, she also thinks that wood might be used with parsimony.

"Aging a rosé wine in oak-barrel must be done very slightly," Ms. Brugière said. "You can try to give more structure but you must keep the freshness and the tension of a rosé. When vanilla aromas are too strong, it's no more a rosé."

But, this sommelier who is now familiar with the best restaurants, also knows how difficult it is when you are working in some other places. She did it for a long time, on the Mediterranean coast, in not so gourmet restaurants.

"When you're sommelier in such places, you don't have any other choices than to sell the rosé of the last vintage," Ms. Brugière said. "It's quite hard to change mentalities."

Prices and Last Vintages

Alexandre Martorana, sommelier, trainer and consultant for many restaurants, based near Toulouse, is aware of this dichotomy.

"It depends on the typicality of the restaurant," he said. "Most of the restaurants are not gourmet's one. There, you're only able to sell rosé wines from the last vintage. It's a matter of prices, for the owner and for the client. In this kind of restaurant, you may find, sometimes, some rosé wines of an older vintage. But it's only when they bought some promotional stocks at a very good price."

As a good taster, he has already tasted these unsold wines.

"Sometimes, they are really quite good, even one year after," he said.

As he also gives advice for very reputed gourmet restaurants, we asked whether there is a place for aged rosé wines.

"Probably in terms of wine food pairings in restaurants where clients are able to pay the price whatever it is," Mr. Martorana said. "With these kinds of rosé, you can easily drink them during the year. I really appreciate them with spicy dishes from north Africa like tajines. Some of them are more on the vegetal sides and I do like to pair them with asiatic food, from Viet-Nam or Laos. But it will be a very long way to admit that we can easily drink these aged rosé wines. It's a question of culture, of learning too. With a blind tasting, it may work, if not, it's impossible to sell to consumers."

In a panorama where red wine consumption is decreasing year after year, the rosé wines, even the aged option may be some good solutions.

"The problems of decreasing red wine consumption have various factors," Mr. Martorana explained. "I think we pushed the game too far in terms of concentration and wood aging. Now, consumers do prefer lighter beverages. That's why they want beers for e.g. But wines still have some great things to offer if they don't forget that they have to be well balanced. And a balance could only be done if you have enough acidity."

Like most of the rosé wines.

Italy

PUGLIA, ABRUZZO AND LAKE GARDA—FROM VOCATION TO EXPERIMENTATION

The common denominator is the search for a more complete and complex expression of wines that are already famous in their respective areas. When thinking about barrels or barriques for fermentation and aging, it's important to keep in mind the idea of freshness and immediate consumption. Ceramics have their place in rosé production as well

Oak To Increase the Nuances of Rosé Wines

By FRANCO SANTINI

When one thinks about the production of rosé wines, the use of wood as a vessel for fermentation and ageing seems to go against nature. We've all heard it said that "It covers the fruit." Or "It overwhelms excessively." Or "It accelerates oxidation, penalising freshness and colour." This list goes on. Moreover, it doesn't come easy to sell and justify this type of wine to those accustomed to its vibrant, fruity aromas and fresh character.
Yet, from an oenological point of view, stainless steel, a material now universally used at every latitude, is a fairly recent invention. Throughout history, wine (no matter the colour) has always been made in barrels. The use of this container, even for rosé wines, shouldn't therefore be seen as something totally unnatural, provided one knows how to use it diligently.
We interviewed wineries that deliberately decided to make rosé wines in wood—a stylistic choice offering more complex and long-lived wines that perhaps helped them differentiate themselves in an increasingly homogeneous market accustomed to light, fruity, unpretentious, pool rosés.
It seemed natural to scout regions that have historically always had an authentic rosatello (light rosé) tradition and vocation. We therefore set our attention on Abruzzo, Puglia and the Garda area where some of the most original and interesting rosés currently available were born. In fact, the oak barrel is only one of the many containers that can be used. Without the right terroir and without sensitive producers, great rosés (and great wines, in general) can never be achieved.

Lake Garda's Rosé Wine Released on the Market after 5 Years

Mattia Vezzola turned his original and non-conformist rosés into a distinctive trademark. At his Costaripa winery, located in the heart of the Valtènesi appellation in Moniga del Garda, he has always embraced the use of small oak barrels for the fermentation and elevation of his rosés, to elevate their organoleptic properties and increase their aging potential.
"It all starts with a simple consideration: how is it possible for a dessert wine to live 100 years, a red to live 50, a white 30 and a rosé no more than four months?" asked Mr. Vezzola. "This happens because of the poor quality of the grapes used to produce many of the rosés in circulation: we are talking about second or third-rated crops, with which you can do little. What's more, many producers often work using the controversial saignée method, extracting only a small percentage of the substances from the berry and leaving the best part, if any, for the red wine."
Everything starts, according to Mr. Vezzola, from the "vocational nature" (ideal conditions or intrinsic suitability) of the territory and the wine project you want to make.
"In my opinion, rosé wines deserve to have a higher standing, because they are not simply wines, but are synonymous with a way of life," he said. "Those who are dedicated to the culture of rosé viticulture, and who come from ideal territories, have a polite, elegant, easy way of life, which commends wines with the same characteristics. Businesses like ours that take the production of rosé wines very seriously—choosing ideal red grape varieties specifically selected to produce rosé wines—must think of longer aging potentials. Not necessarily 10-15 years, but at least three or four. Only a fool would invest 400 hours of work per hectare of vineyard to make a wine that lasts 4 months! If you decide to do serious work on rosés, if you have these values and this identity at heart, and if you are lucky enough to live in a well-suited territory (and there are few of them), you are forced to constantly try to improve yourself. Making rosés, for me, is like working with a precious material, like silk or cashmere; you have to have an uncommon sensitivity and all the necessary technology to avoid ruining it. You have to be curious and explore all avenues, and a proper use of wood is definitely a great tool that helps these products gain longevity. Barrels have always helped to create more complex and long-lived wines, but the risks and difficulties are enormous. We use very old barrels, some having been used for decades, as we keep our 30, 40, and 50-year-old barrels in perfect condition knowing that they might remain empty for a few months. It's a true death-trap considering all the dangers related to mould, dryness and other contaminants. Very few wineries in the world are able to do such a job. If most people change their casks after 4-5 years, for us after 7-8 years they start to become interesting! In short, working with barrels requires a completely different kind of dedication."
The secret, according to Mr. Vezzola, lies in finding the perfect balance between oak and steel.
"During barrel fermentation, there is a stabilisation in terms of oxygen and polyphenols that changes the structure of the wine," he said. "The whole aromatic character: the terpenes, the thiols, the fruit, gets significantly reduced. It is important, therefore, that a part of the wine must always be processed in steel, where, in reduced environments, fabulous aromas can develop. Unfortunately, the latter only lasted a few months. On the other hand, by using a correct mix of cask and steel, the aromas become more delicate and harmonious, less intense, but develop a longer lifespan. Today, our Valtènesi Doc Molmenti, obtained from old vines with sparse grape bunches and a pulp-skin ratio in favour of the former, ages two years in cask and three years in bottle and can be drunk with great satisfaction after 15 years."

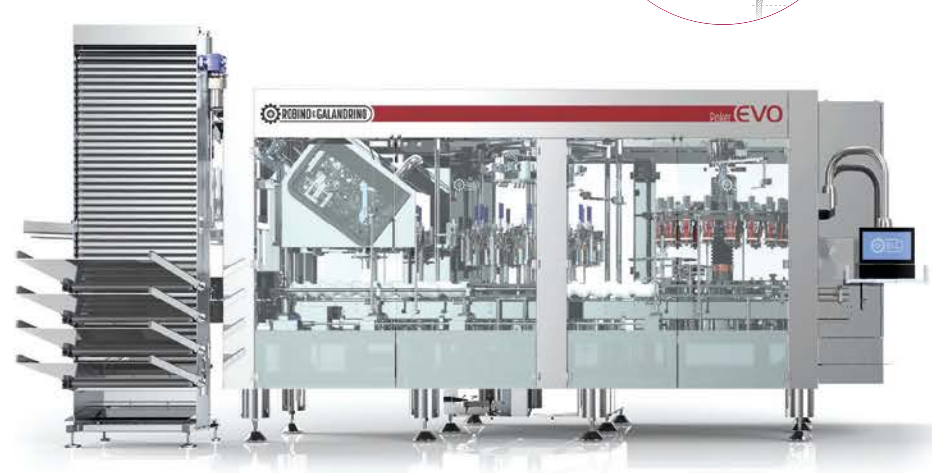
Mattia Vezzola with his children, Nicole and Gherardo

ROBINO & GALANDRINO

Zenith EVO

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

Poker EVO



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

Record EVO PLUS

Feeding, dispensing and application of wirehoods.

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

EVO Series

- AISI 304 stainless steel frame with operation panels in transparent polycarbonate and internal lightning managed by door opening.
- Roof design frame with sloped working surface and controlled drainages (wirehooders).
- Bottle and capsule vision and centring via SNIPER platform.
- Vision peripheral devices: cameras, photocells (colour and UV spots), optical fibres and lasers.
- Electronical axes - brushless motorization.
- 2 high-performance HMI touch screen control panels on movable support.
- Automated, tool-free changeovers with stored settings accessible via the memorized working recipes.
- AISI 304 stainless steel guarding with mirror polished surface and full-height tempered glass doors.

SNIPER
VISUAL TRIGGERING PLATFORM

Based on the most advanced electronical and digital componentry, the **SNIPER** platform developed by **R&G** gathers the vision systems performing the detections and recognitions essential to implement orientation, alignment and centring. The system features a dedicated easy and flexible interface to create and maintain the working recipes, being designed to manage all the available peripheral devices necessary to achieve the targeted functions.

R&G

Italy

Romeo Taraborrelli

Abruzzo. Cask, and not Wood

Totally in line with Mr. Vezzola's thinking is the famous oenologist **Romeo Taraborrelli.** Used to working at different latitudes in the Italian peninsula, he collaborated with well-known Abruzzo wineries, including Di Sipio Wines, where together with the owners for years, he has been developing barrel-aged rosés.

"First of all, I would like to emphasise the term barrel ageing, as opposed to wood ageing," Mr. Taraborrelli said. "Today, when you mention the word wood, everyone wants to stay away from it, just as a couple of decades ago everyone was looking for it. Wine has always been made in barrels. It is a natural thing, and I rather use this term so as not to influence the consumer."

"The idea of a barrel-aged Cerasuolo d'Abruzzo was born in 2006 with Nicola Di Sipio, a farsighted entrepreneur from Chieti," he said. "Who in the early 2000s bought the estate where his father worked as a labourer and started a quality wine project. One day Nicola came to me and said: 'There are so many rosés around, all so similar. Can we make a different one that would differentiate us on the market? One that could last more than one summer and that could still be enjoyed after three or four years?'"

"As an oenologist, I have never imposed my style on the producers I work with, always letting them come up with ideas, which they get from their intimate knowledge of their terroir to express its full potential," Mr. Taraborrelli continued. "That's when I started thinking about what was the best oenological process to achieve that goal. At the time, it was a new concept even for me because I already had a great deal of experience with whites and reds, but I had never made barrel-aged rosé."

"Constantly exchanging with the owner, we began experimenting: total fermentations, partial fermentations, ways in between, aging in barrels of various sizes, until we finally reached, after a few years of trial and error, today's winning formula," he explained. "Di Sipio's Cerasuolo d'Abruzzo is made from grapes perfectly suited to making rosé wine. Today, anyone who wants to approach the world of rosé seriously can only start from a well-suited vineyard. We use cryo-maceration and integral pressing (everything is extracted from the berry very slowly) without adding sulphur dioxide, which extracts and blocks polyphenols and generates instability in the colour."

"Then we use amphorae and barrels of various sizes, from barriques to 30-hectolitre vats," Mr. Taraborrelli said. "One part ferments in barrels and then continues aging in the same container. Another part, after vinification in steel, stays in barrels on the fine lees. One more part ferments and ages in amphorae while a final part is entirely aged in steel. Then, depending on the time of bottling and the wine's evolution, we blend in various percentages, trying to maintain the balance between fruit, freshness and complexity. In this way we are able to obtain a rosé with great character and personality, more multifaceted and long-lived, certainly atypical in its category, but which in terms of colour and basic characteristics remains a Cerasuolo d'Abruzzo. We are talking about a wine that, albeit with a limited production of between 10,000 to 15,000 bottles produced each year, can develop over the course of two to three years more spicy and deeper characteristics, which seem to be very much appreciated by a certain type of wine lovers."

Giovanni and Fernando Calò

Steam-roasted Barriques and the Successful Trials in Apulia

Even further south the heel of Italy, we met with Giovanni and Fernando Calò of the Apulian winery Michele Calò & Figli. Apulia is another area with an authentic rosé tradition, and the Calò brothers have launched a Salento rosé, Cerasa, which was among the first in Italy to be partially aged in barrique. Producing another classic traditional Salento rosé called Mjere for over 50 years, they were looking for a way to make a new product that would live up to their rosé's reputation.

"We wanted to differentiate ourselves on the market and so we thought of a barrel-aged product," Giovanni Calò said. "Yet, when you put wines in barrels there is always the risk of hiding the fruit. We didn't want to lose this characteristic, which is a signature of Negramaro grapes, especially when made as a rosé. Following the invaluable advice of wine technician Beppe Bassi, we tested how to best use the barrique to reach our goal. Today, 20% of the wine ages for five to six months in wood, where it becomes more complex and fixes the colour, while the remaining 80% is kept in steel. The peculiarity is that we use barrels with staves bent in water which are steam-roasted. There is no classic roasting by fire, so in the first few months there is a slightly more vegetal tannin, which then becomes more rounded over time, and does not transfer too much spice and tertiary aromas to the wine."

The clear commercial success and the growing trends in rosé consumption worldwide are the expression of a more mature market for rosé wines. As the market improves, so does the image of rosés, which are starting to get the same type of recognition as whites and reds. If you are lucky enough to work in a well-suited area for the production of good rosé and you have a clear idea of how to approach a wine project with seriousness and dedication, any container will do the trick. Even the 'infamous' wood barrel.

Ceramic. Why not?

Paolo Pasini

Lettera C by Pasini San Giovanni, an organic farm in Raffa di Puegnago del Garda, is a Valtènesi rosé made from mature Groppello gentile grapes, aged on the lees for a long time in oval-shaped ceramic tanks. It is a wine that offers complexity and longevity, earning great praise from critics and the public alike, and presenting itself as an alternative model in the panorama of rosé wines.

"Looking for greater complexity and stability, both in our whites and in our reds, we have acquired a certain amount of experience in refining young wines on noble lees," said Paolo Pasini, the third generation of the family, who runs the company together with his cousins.

"This is what characterises us, regardless of the container," he said. "We decided to focus primarily on the aging potential of the wine, then we went on looking for the most suitable container. Speaking of rosés, we were quite happy to sell them in the summer, but we had higher ambitions, especially based on our experience with whites. Wooden containers did not convince us, despite all their positive effects, especially in terms of complexity. They left a balsamic nuance that was not what we were looking for in our wine."

"Finally, we got better results with oval ceramic barrels," he said. "They are completely neutral containers from an organoleptic point of view and do not affect the final product whatsoever. They are made of replicable and highly stable material, which makes them extremely precise, eliminating unwanted differences between wines made from one container to the next as can happen with barrels. Moreover, they have a very low porosity, which prevents oxidation, favouring a slow micro-oxygenation process."

"We seek the right balance with the stirring of the lees in the wine instead of using exogenous variables to give the wine complexity," he explained. "Focusing on what's essential, we aim for more finesse and freshness. The more we exclude external variables, the more we achieve authentic rosés, and ceramic has proved fundamental to achieve this. The wine we obtain from our oval ceramic barrels does not necessarily have to be consumed in its youth and can last way beyond a season. We put it on the market in the fall of the second year following harvest, precisely to give it a more serious character."

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Italy

AN INCREASINGLY HEATED DEBATE IN ABRUZZO

Lighten colour and body or stick to a more traditional product? This is the stylistic choice Abruzzo's historic rosé producers are debating. A modernist versus traditionalist confrontation, where every approach has its own reasons

What Does the Future Hold for ABRUZZO'S TRADITIONAL ROSÉ?

By **FRANCO SANTINI**

Two main reasons can explain the current rise in popularity of rosé worldwide: a new interest for these wines with numerous occasions to drink them, and a growing attention for higher quality from producers.

Various market studies reveal that pink in the average drinker's view doesn't simply refer to a colour, but a set of values, a way of being and thinking referring to innovation rather than to tradition, light-heartedness as opposed to commitment, and being cool as opposed to snobbish. It represents a new youthful and convivial wine, easy to appreciate and understand, even for beginners.

Provence, of all places, has perfectly embodied these values and has managed in a rather short time span, to successfully change its image from a rather obscure wine-growing region to an area of impressive commercial success. In fact, the so-called Provençal model of rosé wines, based on extremely pale wines showcasing fresh, vibrant fruity aromas, has greatly influenced the style of rosé production around the world including in Abruzzo, a land tightly connected to the production of dark Cerasuolo rosé wines (the name is from the dialectal term *cerasa*, meaning cherry). These traditional wines express dark chromatic tones and carry a unique chewy consistency, making them easily recognisable. These wines, in their most classic expression, are the opposite of the famous Provençal rosés.

And so, a debate over whether or not to lighten the colour and structure of Cerasuolo has divided Abruzzo winemakers. There are those wishing to increase its popularity outside of the region with a lighter version and those who believe in sticking to darker, flavourful wines that can better distinguish themselves in an increasingly standardised market.

Davide Dias (Citra): There is Room for a Light and Modern Cerasuolo

Enologist Davide Dias of Citra Wine, who is part of the company's team of winemakers led by Riccardo Cotarella, explained the rationale behind his view on the future of Abruzzo's rosé. Citra Wine is a huge winery that manages over 6,000 hectares of vineyards across the region of Abruzzo and exports wines to more than 50 countries around the world.

"We cover several markets and we did extensive studies to understand which type of rosé wines were on demand," Mr. Dias said. "The average consumer still considers Cerasuolo d'Abruzzo a rosé, yet it's obvious the Provençal style has established itself around the world, with rosé wines focused on pale colours, intense fruity aromas, a light body and an easy, refreshing flavour profile. We realised that to access in high volumes certain markets like the United States, it is preferable to lighten the chromatic intensity and the structure of our Cerasuoli d'Abruzzo wines."

"I wouldn't say everything is a question of fashion and colour," Mr. Dias added. "High alcohol content, for example, is also frowned upon for a thousand reasons. Cerasuoli of 14°-15°, which are the norm for Abruzzo, also risk being penalised. By making clearer wines we can also manage to extend the shelf life of our rosés by slowing down their deterioration in terms of colour and freshness. The more structured and richer the wine, the faster it is subject to oxidation."

"These new winemaking methods have helped us reduce the tannic content of our wines, something that you generally want to avoid in easy, ready-to-drink rosés, which is inevitable if you perform slightly longer extractions as is traditionally the case with Cerasuolo," he explained.

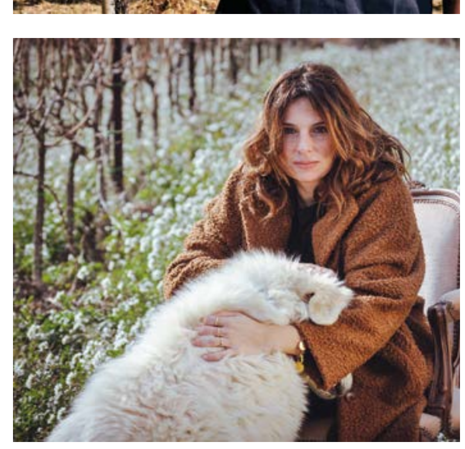
"Our Cerasuoli d'Abruzzo can basically have many styles depending on the taste of each market," he said. "We continue producing more colourful and structured Cerasuoli in a more classic style in some of our lines for some specific markets. Wine lovers that want a traditional, richer and more complex gastronomic wine know where to look for it—many producers make some very good ones. If, on the other hand, they prefer a lighter, simpler rosé, to be drunk outside of meals, I believe that a softer, more modern version of Cerasuolo d'Abruzzo can very well be what is needed."

Chiara Ciavolich (Ciavolich): Respecting the Identity of Abruzzo's Wine of the Future

Chiara Ciavolich, a winemaker from the province of Pescara, is a firm defender of Cerasuolo d'Abruzzo's unique identity.

"It's not a mistake to follow market trends," he said. "It's a reality we all have to deal with. But it's important to call things the right way. The old saying *nomen omen* (true to its name) applies to Cerasuolo d'Abruzzo with its many different shades of dark ripe cherry colour, lightyears away from the salmon or onion pink tones. For this reason, Cerasuolo cannot go below a certain level of shades and should therefore respect a basic chromatic threshold."

Davide Dias



Chiara Ciavolich

"It is true that the international market is not so much interested in the colour of Cerasuolo, because it is a relatively unknown appellation," he continued. "It is now only slowly beginning to get noticed a little thanks to the growing trend of rosés in the world and because people are moving away from deep, red wines. Authentic Cerasuolo d'Abruzzo, with its typical cherry aroma, has a fruitiness and chewiness unlike any other rosé. Containing a more tartaric than malic acidity, it offers a fresher, fruitier mouthfeel, less pungent than most common rosés that often leave a green apple aftertaste on the palate."

"Going beyond the traditional summer wine, we have been taught that orangey-brownish tones are synonymous with decay," he added. "But in the case of any serious Cerasuolo, taste and smell should remain unaffected even after a bit of aging. By the way, a darker, less brilliant colour can also reveal being a very sophisticated choice in terms of consumption."

Mr. Ciavolich is adamant when it comes to Cerasuolo's commercial potential. "For me, this is the wine of the future for Abruzzo, together with Trebbiano, because it belongs to that category of undervalued and mistreated wines, which are meant to step out of the shadows. I truly believe it is a very promising time to work on our Cerasuolo d'Abruzzo, provided we respect its identity. This is a job that must also be done culturally with the collaboration of producers, who should be aware of their history, their origins, and defend them! Those who today make a pale, naive wine, and write Cerasuolo d'Abruzzo on the label, have no respect for all this and are out of touch with reality."

One of the overall impressions in the world of rosé today is that colour still remains the main selling factor, but this is true only because the interest in this type of wine is fairly recent and we have just started experimenting with new possibilities.

Once rosés get the same level of respect as whites and reds do, colour won't be such a fundamental factor, but purely a stylistic choice. Yet there is always a risk for regions with important historic backgrounds to radically change their identity and traditions for commercial purposes. This last aspect seems to be well understood by the Consorzio di Tutela dei Vini d'Abruzzo, where work is underway to establish clearer criteria of typicity and ground them legally.

Traditional Cerasuolo d'Abruzzo, an apparently old-school wine, has all it needs to become avant-garde if given clear rules and credible winemakers able to hand down a coherent story. In the end, the pale rosés being consumed on the beaches of the Côte d'Azur don't have to be the single, prevailing model when it comes to rosé.

Spain

RANKING FIRST IN EXPORTS, LOW IN VALUE

The SPANISH WAY TO ROSÉ: Increasing Volume

The country is still uncertain about its rosès' quality, it exports a lot, but it has yet to create a dedicated sales category as these wines fall under the red wines. It is an element that creates problems to analyse productions and markets. Even if there are areas with traditional productions, the typology has always been deemed "complementary." In other words, there is still a lot of work to do

By HANS P. MONTGOMERY

Leading in quantity exported, Spain has a long tradition of rosé production, with Rioja and Navarra dominating in quality. On the market, volume is not synonymous with valorization, while shelf purchases are driving domestic consumption with prices of appellation rosés surpassing whites.

Outside the country, young people are favouring rosés since they are easy to access and simple to understand. "Traditionally, rosés are positioned in a similar price range to that of young red and white wines. In this sense, there is still a lot of work to be done to make the most of this type of product," **José Luis Benítez**, general manager of *Federaciòn Española del Vino (FEV)*, tells the *World Wine Magazine*.

The Place of Spanish Rosé on the World Market

After an international rebound of the wine trade following the pandemic in 2021 raised hopes for a quick return to business as usual, the global economy plummeted once more with the war in Ukraine, deeply impacting the economy and the wine business overall.

However, two categories have managed to dodge the 2022 drop in exports: sparkling wines, which have been experiencing a positive, largely counter-cyclical trend for years, and rosé wines, an often underestimated niche product that is now standing out from the crowd presenting itself as a viable alternative to whites and reds.

Data from *Unione Italiana Vini's* Wine Observatory for 2022 revealed a 4.2% drop in world exports for still wines (-9.8% for reds and +2.2% for whites), down to 64 million hectolitres from 67 million hectolitres in 2021. Rosé wines showed a diametrically opposing trend, growing 4.2% over the same period, exceeding the 6 million hectolitres mark and almost doubling the 2010 figure, reaching nearly 10% (9.4%) of all still wine export shares.

With 1.84 million hectolitres, or 31% of all rosé wine exported worldwide, Spain remains the undisputed leader of this category on the world market, although it did lose some ground compared to 2010 (when it controlled 39% of rosé shipments), maintaining its position ahead of France and Italy.

The Role of Rosé in the Domestic Market

The rosé wine category, both in terms of production and consumption, is of enormous importance for the production of quality wine in Spain. According to 2021 data collected and analyzed by Nielsen for the DO Rioja, appellation rosé wines accounted for 5.5% of all domestic wine consumption value, with combined sales for the HORECA (hotels restaurants and catering) and distribution channels of 18.6 million litres, up 5.3% over 2020.

Historically, the two most important regions associated with rosé production are Rioja and Navarra especially, explains FEV's general manager, Mr. Benítez.

"It is important to emphasize that this is not a recent phenomenon, far from it," he said. "Navarra has always been a region famous for its rosés on the national wine scene, although their wines are traditionally quite different from those who have been driving the trend in recent years. Rosés are also an integral part of the traditional production of wines from Cigales, Rioja and some subzones of Cataloña."

The Spanish model differs greatly from Italy's, where some appellations are entirely dedicated to the production of rosé wines (such as Chiaretto del Garda or Cerasuolo d'Abruzzo), and from France, where the entire region of Provence is devoted almost exclusively to the production of rosé wine (which accounts for just under 90% of all wine produced each year).

In Spain, on the other hand, rosé "becomes an option among many for many appellations," Mr. Benítez said. "But I don't think that missing a DO or an entire region dedicated exclusively to the production of rosé wines acts as a limitation. On the contrary, in this way we guarantee the category greater diversification. Proof of this are the rosés popping up on the market from more and more different regions, demonstrating in my opinion a greater capacity to adapt to consumer tastes and market trends."

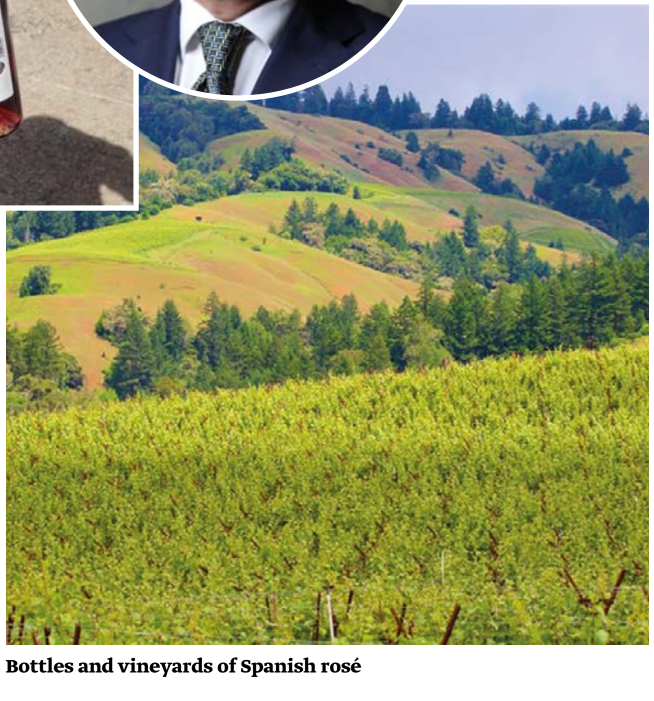
Between Prices and Markets. Still Work to be Done

The average price of good Spanish rosés does not deviate much from the dynamics of whites and reds. Appellation rosés, according to EY Parthenon's analysis of Nielsen data for the DO Navarra, reached an average price of 4.14 Euros per bottle in 2022 in the distribution channel (supermarkets and grocery stores), thanks to a growth of 11.9% between 2020 and 2022. This is the best performance in recent years, with results slightly higher than those of white wines (+11.7%), which are dragging behind on the average price (3.59 Euros per bottle), and significantly better than that of reds (+7.9% but already asking a higher average price of 5.67 Euros per bottle).

The story seems quite different in the HORECA segment, where the average price per bottle slightly exceeds shelf price at 4.48 Euros, with a comparative 8.3% growth over the same period. White and red appellation wines are far ahead, the former reaching 6.23 Euros per bottle (+10.1%) at the table and at the counter, while the latter fetches 8.27 Euros per bottle (+18.1%).

Average prices of rosés are not very high, reflecting the entire national production made up not only of appellation wines, but also of large volumes of generic rosés, which are selling for a far more derisory value. On the shelf, according to mid-2021 data from the *Ministerio de Agricultura, Pesca y Alimentación*, the average price was just 1.90 Euros per litre, down 11.6% compared to the previous 12 months, precisely because prices of generic rosés plummeted 18.5%.

José Luis Benítez



Bottles and vineyards of Spanish rosé

The levels are substantially in line with other still wines.

"Although there are numerous examples of rosé wines, from different regions, capable of creating high added value," said Mr. Benítez. "Such as the celebrated Viña Tondonia Rosado Gran Reserva from the Rioja Bodegas R. López de Heredia, rosés are traditionally positioned in a similar price range than young red and white wines. In this sense, there is still a lot of work to be done to make the most of this type of product."

A goal turned into a particularly lively and responsive market -both domestic and foreign- where rosé sparkling wines are also slowly making their way, accounting for 5% of the production.

Millennials and Gen Z, who are leading the consumption revolution in wine as in any other commodity type "are mainly looking for simpler, easy to understand rosés, which preferably avoid oak-aging. We must take advantage of this as a gateway to the wonderful world of wine for the new generations, obviously in moderation," Mr. Benítez warned.

Finally, he recognizes the fundamental role played by international tourism in raising awareness of Spanish rosé wine around the world, as well as the relevance of a global market that is increasingly looking for a product suited to gastronomy and less mature palates, without excessive complexity.

Rioja and Navarra, the Cornerstones of Spain in Pink

Both from the north, Rioja and Navarra are the two main flagship regions for Spanish rosé and account for 52.7% of the national production of pink quality appellation wines.

Combining both distribution and HORECA segments, Navarra still holds 29.9% of the market share for premium rosés, compared to 34.8% in 2015. While being the undisputed leader in terms of volume for now, this is not the case from an average price standpoint. Despite the excellent performance of the last two years (2020-2022), the average shelf price of Navarra's rosés, standing at 3.40 Euros per bottle, is well below the 4.14 Euros overall average tag price for appellation rosés.

The small Aragonese appellation, Somontano, sits at the top with an average 7.59 Euros a bottle, just ahead of the Catalan "Comarca" Ampurdán, fetching 6.58 Euros a bottle and the DO Cataluña at 5.29 Euros a bottle. At 4.68 Euros a bottle, Rioja is also doing well, yet slightly less than the Penedés rosés at 4.87 Euros per bottle.

Within HORECA, the difference between the average price of Navarra's rosés (4.04 Euros per bottle) and the average price of appellation rosés (4.48 Euros per bottle) is much narrower.

Rosé wines from the Ribera del Duero are the most valued on restaurant tables and bar counters, with an average price of 5.88 Euros per bottle. Rioja stands right behind at 5.09 Euros, while Leòn goes for 5.02 Euros, Somontano for 4.76 Euros, Cigales for 4.44 Euros and Penedés 4.07 Euros.

In 2021 in the Rioja, rosé accounted for 4% of the total appellation wine sales in the Spanish market and 1.1% of all rosé consumed in the country, with just under 5 million bottles sold, an increase of 13.3% over 2020 (although one million less bottles were sold compared to 2019). Of these, 3.5 million bottles were sold on the shelves of large and small retailers, and the 1.5 million remaining bottles through the HORECA channel.

Finally, it is interesting to note that the average shelf price of Spanish rosés on the domestic market is less than 5 Euros per bottle in 63% of cases, while 81.8% cost less than 3 Euros per bottle when generic rosés are taken into account. Rosés from Navarra are doing worse than average with 84.8% of labels priced under the 5 Euro mark. 31.8% of rosés from Rioja ask between 5 and 10 Euros per bottle and those selling for less than 5 Euros account for 63.5% of the total rosé sales of the appellation.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China

MARKET AND PRODUCTION TRENDS

Darker and Not-Too-Expensive Rosés Could HAVE A FUTURE IN CHINA

There is no pink boom in China yet, but there have been some positive signs during the Covid pandemic. Experts have different views. Looking at the data, Champagne and Provence wines already own the high-end of the market, and there is some room- maybe even a lot, albeit not immediately- for rosé wines of intense hues and average prices

By **IAN D'AGATA**

China has always been thought of as country made up mostly of red wine drinkers. However, there is clear-cut evidence pointing to the fact that over the last five years, interest in white wine has increased dramatically, something that is demonstrated by wine sales as well. But at a point in time when it is becoming increasingly apparent that tastes and drinking habits are beginning to change, albeit slowly, in China, how are Rosé wines faring? Unfortunately, for the most part, it appears that pink is the wine colour that is still bringing up the rear among Chinese wine consumer preferences. That much admitted, there are caveats, and the data needs to be interpreted carefully.

A Look at Market and Trends

A study performed on behalf of a private wine group concluded that the product positioning of a potentially successful Rosé wine in China should be mainly mid-range priced, classically dry, and still (Zihong Zhang, 2019). The study also suggested that product's main consumers would be living in first-tier cities (large cities such as for example Shanghai, Beijing, Guanzhou) and second-tier coastal cities, that they would be young and middle-aged women (but with men also representing a potentially important group). Furthermore, Mr. Zhang also postulated a breakthrough in marketing channels focusing on cinemas and their surrounding food and beverage channels, as well as large bottle packaging. Clearly, already then it was apparent that Rosé wines are especially suited for specific scenarios, such as the summer season, while the quality of the wine itself was not as important as it was for red wines, meaning also that the acceptable price point of sale for Rosé wines is lower. Which in turn means that producers can count on higher volumes, lower costs and faster turnaround, but the product's usually shorter lifespan means it needs to be consumed quickly (hence the existence of a specific scenario, or season). For this reason, large international conglomerate brands sell Rosé wines (fast cash flow) but they are not the wine mainstay brands for such companies in China (too much risk exposure). An analysis of the relative data would seem to bear this out. The share of consumption in the Rosé wine category has been very low in the Chinese domestic market for a long time, with consumption of 1,100,000 cases (9 litres per case, meaning 13.2 million bottles) as of 2018. This already small presence was sadly showing a declining market share (from 0.8% in 2008 to 0.72% in 2018). However, that disappointing state of affairs did not take into account sparkling wine, which enjoyed a slightly higher market share than still rosé wine. Unfortunately, even adding the two categories together, still Rosé wines together with sparkling Rosé wines, the total amounted to no more than 1.5% of the total market sales share. Even worse, this market share had grown over the previous decade less rapidly than all other wine categories.

Mr. Zhang's study correctly pointed out how such figures were especially disappointing in light of both the increasing worldwide production and of consumption of Rosé wines. While worldwide consumption of wine (all colour categories included) had barely increased over that same previous decade (characterized by intermittent and annually alternating increases and decreases), the Rosé wine category saw a 20% increase (and that increase in consumption was referred only to 2008-2018, but it was close to 30% if one analyzed data back to 2000). Neither can we surmise that such results are due to individual country realities. While it is true that China does not have the traditional history of wine consumption of most European countries, the USA and Russia also have a short history of Rosé wine consumption, and yet the rapid growth in the share of Rosé wine sales in those countries (and that has also occurred in recent years in the Nordic countries, including in this context the United Kingdom as well), suggests that marketing factors have played a decisive role in this. Furthermore, in most countries it appears that women consume significantly more rosé wine than men, and an analysis of the available data implies the same appears to be true of China. And like everywhere else, in China too Rosé wine sales are a mostly seasonal event. Comparing the trends for the keywords "rosé" and "wine" on Baidu, a Chinese search engine akin to Google, we can see that there are peaks and troughs throughout the course of a year. Not surprisingly, peak searches occur around August (summer) but also in February (which might seem surprising to Westerners, but not if you realize that that is when the Chinese New Year falls and it is a time of great festivities and celebrations). Mr. Zhang's study reveals sales figures obtained from a survey of 391 wine outlets in international hotel chains and restaurants of five cities across China including Guangzhou, Shenzhen and Chengdu, showing a slightly higher presence of Rosé sparkling wines compared to still wines (53% vs. 47%), with Champagne accounting for over 54% of the Rosé sparkling wine category. From data collected by field visits to several large supermarkets, the percentage of Rosé wines present was at the time generally low (and this is still true to a certain extent today), with sparkling wines generally priced at lower price points, generally concentrated in the 50-150 RMB/bottle range (6.50-19 Euros - these are often sweet and/or semi-sweet wines and sold in various shaped and often colourful bottles); fewer are found in the 150-300 RMB/bottle price range (19-38 Euros - this price range appears to have a large potential for growth thanks to potential consumer upgrading) but this segment is also dominated by mostly dry Rosé wines from Southern France; and the highest priced rosé wines being Rosé Champagne in the 500 RMB (64 Euros) price range and much above. So, in summary, the category of the most expensive rosé wines in China, priced at 500 RMB and above (64 Euros), is basically monopolised by French Champagne brands. The only exception is the most famous dry rosé still wines from Provence, but even they sell for less, falling in an intermediate price range. By contrast, domestic rosés range in price from 90 to 200 RMB (11.50 to 25.50 Euros). Note that the market share and selling price of Rosé wines in China's hotel catering channel is very different from the e-commerce and supermarket channels just mentioned. In this case, half of the top twenty Rosé wines are Champagne brands and only four are semi-sweet or sweet, with the rest classically dry sparkling or still rosé wines. In other words, these are generally more "serious" pink wines, sold in the classically shaped bottles and with classic-looking labels. France has a virtual monopoly on this list, with products from other countries appearing from time to time and priced at about half the price point of French wines on average. Part of the reason explaining the better sales, and the higher price point of the French Rosé wines and especially Champagnes, is not just the fame of these wines, but also the better trained and more professional staff in catering, restaurants and hotels that, when push comes to shove, almost always recommend French wines. But no matter which sales channel is considered, it is apparent that in China there is a niche to fill in the mid-price Rosé wine category, both sparkling and still (which is also the Rosé wine category that is mainstream in France, Scandinavia, the UK and the USA, so it should hardly be different in China). At this point in time, after having analysed some of the data and figures, it remains to see what the local experts, those who live and work in China, and so actually know what they are talking about, have to say about the "drink pink" movement.

Maxime Gibrat

Matthieu Chatenay

Ifan Wang

Writer Ian D'Agata with Kevin Chatain (right)

Local Experts

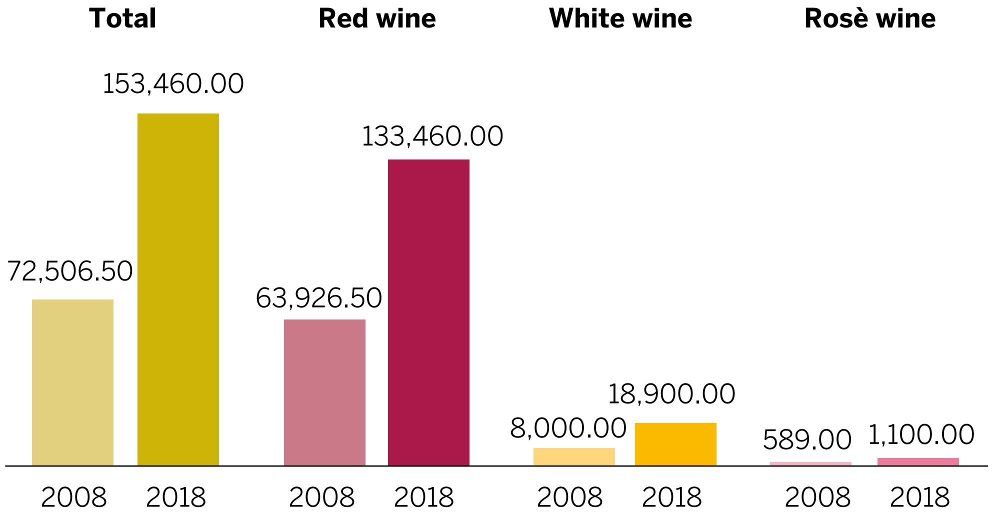
For the most part, opinions converge, but there are some noteworthy discrepancies worth listening to and analysing.

Maxime Gibrat, National Sales Director at Bund Bank of Fine Wines (a very high-end importer of fine wines), is not so bullish on Rosé wine sales in China.

"We keep hearing about Rosé wine sales picking up, or that there might soon be an increase in interest towards this style of wine on the part of Chinese consumers, but frankly, it's very slow in coming," said Mr. Gibrat. "To date, I can't

WINE CONSUMPTION IN CHINA BY COLOUR (2008-2018)

Thousands of cases (each one contains 6 bottles x0.75ml)



Fonte: (International Wine and Spirits Research Centre)


Images from the XIGE Estate

say we have really seen much of an upswing in sales. People talk about Rosé wines and that they should be trying more of them, but in fact, when the time comes, they always turn to sparkling, white or red wines. Truth is, Rosé wine sales have never gone as expected. I used to sell the wines of Domaine Ott, one of the truly iconic Rosé wines of the world, but sales in China were never anything like the great sales the same brand had in the USA or the United Kingdom. I guess the positive way of looking at this is to think that Champagne in China once had very much the same problem, with flatlining sales. The issue was that Champagne needed to be introduced and explained to the Chinese wine loving set so as to establish it as a quality drink in their minds. Once that message was successfully broadcast, sales picked up steam. Unfortunately for pink wines, the problem was and has been that cheap Rosé wines really ruined the market: for example, when I arrived the big Rosé wine available here was a White Zinfandel, and that was a disaster."

Sometimes though, unexpected life and world events come to the rescue, sort of. For example, the Covid pandemic changed people's buying habits: patterns of how they bought wine and what they buy have morphed.

"With Covid, we found that Rosé wine sales were actually pretty good for us in 2022," Mr. Gibrat said. "Mostly because it is inexpensive and so private consumers accounted for a sharp increase in sales, happily drinking it at home during the various lockdowns. And so it is that we now currently sell two different Rosé wines. Chateau Mascaronne, a pink wine made with organically grown grapes (the property has the same owners as Chateau Cos d'Estournel) and Domaine Salauze Pomponette (a pink natural wine)."

Mr. Gibrat is really not positive about pink wine in China.

"Listen, I might be wrong, but for what it's worth, most of the Rosé sold in China is from Provence," he said. "But ultimately, what determines pink wine sale volumes, at least here in China, is price, not the grape variety, not the region and not the wine's quality level. So, people need to keep that in mind."

By contrast, **Matthieu Chatenay**, manager of Magnum Fine Wines, is among those who are positive about pink wine in China.

"Though I don't think this will be the year in which we see a boom in sales," he said. "I do believe that the potential for all types of pink wines is enormous here, beginning with all the sparkling pink wines you can think of, not just Champagne. Remember that Chinese people love to drink wine during celebrations and they do celebrate quite a bit with family and friends; those are perfect occasions in which to open pink wines, again, the sparkling ones more than any other kinds. That said, I agree with the generally held view that Chinese wine lovers prefer pink wines with much more colour and structure than is common elsewhere in the world. Last but not least I think westerners tend to forget, or aren't yet picking upon the importance of this, and that is food and wine pairing: Chinese cuisine is really a mostly white wine cuisine, but even better for it than whites I think are pink wines. And so, I for one believe the future to be bright, though it will take some time."

A well-known Taiwanese importer, **Ifan Wang** (co-founder of Pietra Rossa Imports), has had experience selling Rosé wines dating back to when she was working for an importing company that specialized in French wines. But even more so now that she's at the head of her own wine importing company specializing in Italian wines.

"When I used to work with French wines, we carried multiple brands of French Rosé wines, mostly from Provence," Mr. Wang said. "But I have to say it was very tough going. While drinking pink wines is a lifestyle trend in France, it is not so in China, where interest in these wines remains low. True, I have seen and heard from friends of a slight uptick in interest, especially in Shanghai that is a very cosmopolitan city, but for the most part I find true pink wines are a tough sell in this market. But I think there's good news after all: in fact, it's a totally different story with other, non-Provence styled pink wines. For example, Cerasuolo d'Abruzzo is the one pink wine that really appears to do well here in Shanghai, if not all of China. Clearly, this is because Cerasuolo d'Abruzzo is not considered a pink wine at all, because it has historically been more a pale red wine. Thankfully, I work with a very traditional producer, and his Cerasuolo is still a dark pink/pale red: Shanghai is a very open-minded city, so that's what people here like, and I sell it very well. So in my view, I would say there are two basic types of pink wines to sell here in China, pale pink and dark pink, but from what I've seen it is the latter that are selling more or less well, while sales of the really pale pink ones struggle."

Abruzzo producers would do well to pay attention to this assessment: a growing number of Cerasuolo d'Abruzzo wines are now being increasingly made in an extremely light pink colour, and clearly the only reason for that is to cash in on the world-wide popularity (but not in China) of pale-as-water pink wines from Provence. But that's not the right way to go, as it weakens its image, and doesn't fully respect the tradition and the identity of a great historic Italian wine. Ultimately, it will make it very hard for those producers who have switched to making pale pink wines once the fashion and interest in pale pink wines dies out (as it inevitably will, all fashions do). Besides, producers wishing to make a pale pink wine can just label it "Rosato."

Kevin Chatain, restaurant manager of the one star-Michelin restaurant Lameloise in Shanghai, whose wine list carries pink wines only from different areas of France (including a rare, and excellent, Sciaccarellu wine from Corsica), also believes darker, fleshier pink wines do better in China. But he has also seen a slight rise in pale Rosé wine sales too.

"I would say interest picked up last year, perhaps due to Covid, when we saw actually good wine sales of our pink wines during the summer especially," Mr. Chatain said. "Sales fall off in other periods of the year, but it is now at the point where during the summer months we actually serve two or three different Rosé wines by the glass, and this would have been completely unthinkable two to three years ago. For example, the Marsannay Rosé wine from Bruno Clair sells quite well. So yes, I'd say that something looks to be changing relative to the perception people have of pink wines and their consumption...for the most part, perhaps because we are a French food restaurant and our clientele is used to pale French pink wines, when they do ask for a Rosé wine, it is always a light and fresh one. However, we have found that they are very open to trying bigger and more structured pink wines, so at least here in China, pink wine drinking is definitely not just about the ultra-pale Provence style wines that are all the rage everywhere else."


Fei Fei Liu


James Teng


Simon Briens

Opinions on the matter do vary wildly. Well-known sommelier **Fei Fei Liu**, now the Head of Pudao Wines, a high-end wine shop with multiple branches in Shanghai, said that "Rosé wine sales are still very difficult here. In the last five years we have seen a noteworthy rise in sales of white and of sparkling wines, when it used to be that wine sales in China were essentially all of red wines only. So that has definitely changed, but we aren't there yet for pink wines. It is true that recently, perhaps because of climate change and the increasingly hot summers, some people have turned to drinking slightly chilled pink wines, but they really limit such drinking at picnics and barbecues mostly. This is something we never saw before, so I'd say that while most people stick with their drinking preferences, there is some increase in sales of Rosé wines come summertime."

By contrast, and confirming how opinions do vary quite a bit amongst Chinese food and Beverage industry experts, **James Teng**, Head Sommelier of the Middle House Hotel in Shanghai and its galaxy of outstanding restaurants including Café Gray and Frasca, is not convinced about the Rosé-summer relationship.

"I have yet to see the anticipated Rosé wine trend, at least at our restaurants," he said. "We actually do sell many Rosés, from Provence, Italy and of course Champagne, however I wouldn't say that it has been a trend, even during summer for that matter. From my observation point, many of the Rosé wines are still being consumed by foreigners either living or visiting Shanghai, and not by the local populace. That much admitted, Rosé can however be a good topic for summer parties, but again, people here are indifferent to the flavour or style of Rosé, perhaps because of its colour and its association with care free summer sipping that makes it seem like a less important wine category."

Other players described the past few years as a missed opportunity, and saw the future as quite bleak for Rosé wines in China.

Simon Briens, owner of Blaz, one of Shanghai's best bistros and the ultra-successful chain of RAC gallette bretonne, hamburger, salads, and sandwich shops, said that one needs to address the question in terms of style, most notably the wine's colour. Mr. Briens sells a lot of wine at both Blaz and the RAC shops, so he's aware of trends in wine consumption.

"Back in 2018 and 2019, it was brightly coloured pink wines in the typical Provence-style that worked well, but unfortunately only a few brands were available," Mr. Briens said. "These were all the same ones that you would find everywhere, so choices were too limited and ultimately people got bored: when importers realized there was a need to fill and started importing a number of new wines, the wave of interest had died down. Today, difficulties in pink wine sales may be because there is increased competition from low-priced, light-bodied red wines. Unfortunately, I really don't see that much interest in pink wines which is curious, because like I said earlier, back in 2018 and 2019 our Rosés by the glass sold better than any white wine, as hard as that may be to believe. But today it is no longer so and I am really not sure why that is."

A Light Among Lots of Shades

As experts disagree in their analysis of the pink wines' prospects in China, one aspect seems clear. There is a market niche that can be filled in China relative to pink wines, but producers need to do their homework, rather than copy-cat what others are doing in other countries such as France. They also need to try new things, such as offering Rosé wines in cans. And above all, just because the word has fallen for pale-as-water pink wines from Provence (onion-skin colour or less), be aware that does not mean those wines will work in China. For sure, it appears that fleshier, richer, darker-coloured pink wines do better here, and that is something producers of Rosé wines all over the world do well to keep in mind.

Meet The Chinese Rosé Producers


Emma Gao

Emma Gao, owner of the Silver Heights winery in Ningxia, has a cult following for her Chardonnay and Pinot Noir wines especially (though recently her Marselan wine has been reaping in the awards too). She believes that for Chinese people it is mostly a red and white wines market first and foremost, at least for the time being. There is a market for pink wines, but just like Teng, she finds it is international clientele-related.

"My pink wine is a blend of Chardonnay and Pinot Noir, and I absolutely have to make it, because a subset of my customers actively ask for and want it," Ms. Gao said. "And so, I make about 5,000 bottles a year, and it sells well. But you need to know that it is my foreign customers who buy it, not the Chinese."

For this reason, Ms. Gao finds that she has to make her Rosé wine in a pale onion-skin colour harkening back to that of the wines of Provence, because its her international customers driving her Rosé wine sales and they are all looking for that type of Rosé wine.

But that it's not all doom and gloom, is exemplified by Chinese companies trying new things. At XIGE Estate, one of the best wineries in China, they have started to place Rosé wine in cans, much like a soft drink. A blend of Cabernet Sauvignon and a little Merlot, with added carbonation, it is remarkably fresh and flavourful, and quite honestly a lot of fun to drink (the estate also bottles a Chardonnay wine like this too). Sales are doing well and the winery is very happy with h/ow this pink wine is performing.

Canada

SEASONS MATTER, BUT UP TO A POINT

The season matters a lot in a country with quite short summers, but something is changing. Champagne and Provençal wines have a small market for now, but changes are forecast in terms of style and colour. Yet producers need to believe and invest in the country

Why Do Canadians Drink Less Rosé?

By **GABRIEL RIEL-SALVATORE**

Rosé wines have seen a surge in popularity worldwide these past few years, yet Canada seems to be somewhat at odds with the trend. Are northern countries simply less inclined to drink rosé wines one would dare ask? After all, pool summer wines might seem like a contradiction in the local drinking habits of countries accustomed to living with five-month long winters. To better understand the reasons behind this setback, we tapped into the subject with local and international professionals asking them how Canadian consumers perceive rosé wines in general, and if pink might become the new red in the near future?

Consumption Trends

Ben Bernheim, a wine writer specializing in rosés and author of *Rosés of Southern France*, carefully studied the recent phenomenon around rosé wines wondering if this worldwide affair was just a fling or something more serious leading to a deeper trend.

"Wine consumption has been falling all over the place for the past hundred years," he said. "But we're seeing premiumization. People are drinking less, but better."

For him, the inexpensive pool rosé has no place in the wine culture of the future as people are currently looking for finer, lighter wines. "I think rosé has its place there, but the rosé of 2030 won't be the same as it is today," Mr. Bernheim said.

A glance at recent figures helps understand how wine consumption has changed over the years, but it all depends on the message you want to get across, argues Bernheim.

"Rosé has gone from 8.5% of the wine market by volume in 2002 to 10.5% in 2019," he said. "With Covid, figures are hard to come by after that date. This can be seen either as a strong growth, or as a surprise. It's not that big an increase, and yet everyone's talking about it."

He notes that the price of bulk Côtes de Provence rosé has tripled during this period (now reaching around 3 Euros a litre), while that of Pays d'Oc rosé (a rosé of the same style using the same grape varieties and of which much more is produced) has stagnated at around 1 Euro a litre.

"Consumers will learn that not everything pink is good, and producers will find out that making a bad wine, as pale as possible, won't boost their margins with easy sales," Mr. Bernheim said.

"We're going to see a slowdown in rosé growth, probably followed by a rapid drop in the volume of very entry-level wines. Mid-range and top-of-the-range wines, on the other hand, will continue to grow. Quality will explode as soon as sales slow down, and producers will have to work to sell their rosé."

When asked what type of rosé consumers generally look for, Mr. Bernheim divides people into two groups.

"There are roughly two types of wine consumers," he said. "Those who are interested in quality (in the broadest sense of the term) and those who are not. In other words, those who are looking for 'a glass of rosé, please' at the bar or supermarket, and those who are looking for the story behind the wine, the name of the producer, the grape varieties, the terroir."

And what about colour or style?

"Sweetness and colour play little part in the first case, for whom it's mainly a question of ordering what's fashionable or available," Mr. Bernheim said. "But equally little for those who are interested in the quality of the wine, and therefore for whom there are more important criteria."

A French Supremacy

"There has been a shift towards dry rosés," said **Gilles Goulet**, category director (France) at the Société des Alcools du Québec (SAQ), one of Canada's leading government-run alcohol monopolies. "After the fashion for pale rosés, this colour is now gaining in structure and intensity."

France accounts for 70% of rosés sold in the French speaking province of Québec, while Provence alone accounts for 14% of sales. The Premium segments wines selling for over $20 are still dominated by France (72%), followed a long way behind by Spain (9%) and Italy (8%). More rosés are bought by younger people than whites or reds, and 60% of rosé wines are purchased by women according to Goulet. While rosé wines are very well positioned in the mid-range and top-range categories, this is less the case in Quebec, which doesn't really seem to offer much at the top end of the market. Forecasts for the next five years are not pointing to any downward trend, yet Goulet believes this category has now reached maturity and should remain fairly stable. Sales were $124 million last year (about 113 million Euros), similar to previous years. The breakdown of wine sales by colour remains more or less the same this year compared to the year before. Rosés accounted for 6.1% of wine sales last year and 5.9% this year (compared to whites, which have risen from 40.4% to 42.3% in 2023, and reds which have decreased from 53.4% to 51.7%). In total, the SAQ currently has 78 rosé wines in continuous supply (including 31 rosés from Quebec) that are supplied year-round (or at least during the summer season in the case of rosés from Quebec). There are around 200 specialty products per batch, with marketing scheduled for 2023, details Goulet.

"It's important to note that we have year-round deliveries for this category," Mr. Goulet said, adding that 45% of sales are made during the three summer months. "However, we can estimate that more than 90% of deliveries are planned for marketing between March and October."

A Seasonal Product

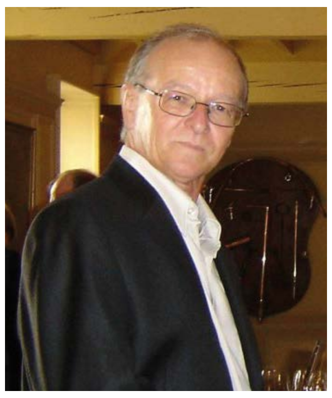
"In terms of volume, rosé wines will always remain a seasonal product very much influenced by good or bad weather, especially for entry level wines which are often a door opener for young wine drinkers," said **Réal Wolfe,** president of Sélections Mondiales du Canada. This long-time player on the Canadian wine market has over 40 years of experience. For him, the overall impression around rosé wines has greatly evolved from a simple pool wine to a more gastronomic wine.

Ben Bernheim

Gilles Goulet

Réal Wolfe

Vincent Fournie



Marc-André Gagnon

Elise Lamber

"Rosé has become trendy and fashionable, and this category has succeeded in establishing itself by attracting new customers, both men and women, young and old," Mr. Wolfe said. "We also have to be careful regarding statistics during the pandemic because everything was upsetting. Many orders did not arrive on time, some arriving even a year later. Therefore, the numbers should have been higher than they were."

"Even though it remains a seasonal product, there is now an increasing offer of quality rosés, which like many white wines, are also perfect paired with food," he explained. "Rosé was often associated with spicy foods and sushi, but today the pairings go well beyond that with more structured wines. Some can even be aged like Bandol rosé and which can pair quite well with salads, vegetarian dishes or even grilled meats."

This could translate into having people drinking rosé around Christmas time or paired with more elaborate dishes all year long. Just like important red wines are slowly becoming lighter and softer using less oak, we can find more structured rosés which in some ways are answering this quest for lighter red wines, Mr. Wolfe argued. Although rosé wines have also become very well positioned in the mid-range and top-range market, there is a limit in terms of how much consumers are willing to pay for a rosé, he warned.

Is Rosé a Top-of-range Wine?

"I'm not sure that people see rosé as a top-of-range wine," said **Vincent Fournier**, wine marketing specialist at Université du Québec à Montréal. "But we are starting to see some top-end rosés getting on the Quebec market, with products such as Domaine Ott from Provence and wines from Gérard Bertrand from the Languedoc."

"In terms of sparkling, rosé Champagnes started the trend some time ago," he added. "Top restaurants like l'Express already served a lot of Krug Rosé back in the 1990s. In Quebec, Mumm Napa Rosé is also a very popular rosé sparkling wine."

He explained that the craze for Prosecco rosé doesn't seem to have hit the Canadian shores yet.

"You rarely see any rosés on the wine list in restaurants," said **Marc-André Gagnon**, a local wine writer of the Blog Vin Québec. According to him, orange wines seem to be much trendier at the moment, directly competing with rosé wines in the gastronomy sector. Signature rosés clearly have their place on high end wine lists and pairing menus, although these wines are more seasonal on the Canadian market compared to the USA believes **Elise Lambert**, Master Sommelier and best sommelier of Americas 2009, who worked in some of Montreal's finest restaurants such as The Ritz Carlton Montreal's Maison Boulud and which consults regularly in Naples, Florida.

Investing in Canada

In terms of offer in local restaurants, the main difficulty remains dealing with overstocks when reaching September.

"Being left with so-called 'summer rosés' becomes a problem when the new arrivals start entering the market for the fall and the winter seasons," Mr. Wolfe said. "It then becomes harder for stores or restaurant owners to continue promoting rosé. This is without talking about their lack of accessibility throughout the year or their short life span in terms of storage."

Canada did hop on the rosé bandwagon, as the growing range of better rosé wines in recent years can attests. Yet, with 280 rosés listed on the SAQ website compared with 5,000 reds and 3,000 whites (some of these wines are no longer available), this remains a product that may sell in a certain volume, but whose supply remains limited. Rosé wines account for only 3.5% of the total references listed at the SAQ. In France, 33% of wine consumed is rosé, because supermarkets offer consumers a wide choice, often dozens of references. The rosé offer is close to 33% of references, and the sales unmistakably follow. As Ben Bernheim summarized, "You can't expect to sell 33% of rosé if the offer is only 3.5%, especially if a consumer has to look for a solitary bottle of rosé and there's very little choice. The SAQ and the local importers have to believe in it for it to be the same in Quebec."

With an increasing offer of high-quality rosés that can be opened all year long, this may well be possible, even in a cold country like Canada.

Scandinavia

SWEDEN, NORWAY AND DENMARK LIKE ROSÉ AT DIFFERENT RATES

The Short Nordic Summers DON'T STOP THE PINK TREND

Like everywhere, Rosé wines keep winning market shares even in northern Europe, especially French ones, and consumption is mostly connected to the less cold season. Younger drinkers and women are the market targets, and early signs of value growth are visible for premium wines

By **ASA JOHANSSON**

According to Rosé Wine World Tracking, since 2002, worldwide consumption of rosé has been on the rise. It has increased by an average of nearly 1% annually, over the past 17 years. The dynamics of global rosé wine consumption are driven in large part by Western Europe, as well as by the USA. The same trend can be seen in the Scandinavian countries. Looking at the statistics from the monopolies in Sweden and Norway, the sales of rosé wines have more than doubled in the last fifteen years.

"A Restaurant owner told me the other day that as soon as the warmer sun comes out in April, May or June, everyone drinks rosé in Sweden. Even the middle-aged man who normally orders a large beer would, for a month or so, order rosé instead," said **Håkan Johansson,** vice president at the Swedish wine importer Johan Lidby Vinhandel.

Italy has for years dominated the red wine scene in Sweden, but when it comes to rosé wine, France is the leading country and has been so for the last ten years. Second place comes Spain, selling half of the volume compared to France. Chile is third, followed by the USA, South Africa, and Italy.

"Classic Provence style rosé wines, with pale salmon colour and generic light red fruits, are in popular demand at outside summer bars and terraces by the average wine consumer," said Swedish wine journalist **Pär Strömberg**. "More niched wine lovers tend to go for darker coloured and more structured rosés, from Sangiovese, Nebbiolo, Cinsault or Pinot noir."

The ten most sold rosé wines at the Swedish Monopoly, Systembolaget, are sold in three- or one-litre bag-in-box. The number one product with over 1,5 million litres sold during 2022 is Puy Chéri Syrah Rosé in a bag-in-box of 3 litres for 23 Euro. It is a wine made by Foncalieu, a cooperative in Languedoc-Roussillon. It has been among Sweden's top five most sold rosé wines since 2014. The most popular price range is between 6 and 7,50 Euro per litre. In this range, in 2022, 7,4 million litres were sold, but the higher price segments are growing—especially the one between 7,50 Euro and 12 Euro per litre.

Håkan Johansson confirmed there is a change going on. "Previously, rosé wine was a category people would not spend at all, and it used to be only the low-price segments that were in demand," he said. "Today we see a much bigger selection of higher-priced wines on the shelves in the Monopoly stores. We also see quite a big number of releases from Systembolaget every spring and early summer of rosé-wines in the price range of 13 to 18 Euros."

In Norway, the situation is slightly different. France is number one, but the preference for light-coloured rosés in Provence style, precisely like in Sweden, but in Norway, in second place, we find Italy, followed by Chile, USA, Germany, and Spain.

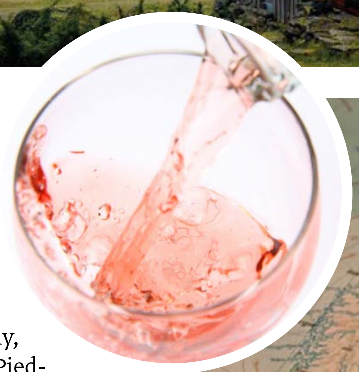
"The Provence style rosé from France is a best seller, but also rosé wines from Piedmont made with Nebbiolo and Barbera are doing better for every year, especially when sold in bag-in-box," said **Trond Erling Pettersen,** category manager at the Norwegian State Monopoly, Vinmonopolet.

Liora Levi, Norwegian wine writer and TV host said that "Lighter and less alcohol is what goes in Norway currently, and that also goes for rosés.


Håkan Johansson


Pär Strömberg


Trond Erling Pettersen



Provence is popular as never before, but so is Pinot's (Spätburgunders) from Germany and lighter style rosés from Spain and Italy, like Nebbiolo from Piedmont."

Liora Levi thinks that in Norway, people generally start enjoying rosés as soon as spring is in the air until the sun is no longer warming in the fall.

"Overall, people still tend to use rosés as aperitifs rather than with food even though many of the wine journalists try to promote it also as a food wine," she said.

Also, in Denmark, the consumption of rosè wine is driven by the weather.

"Rosé has become a wine for all occasions from Easter to August," said Danish wine writer **Thomas Rydberg**. "Outside this period, no rosé wines are sold. During summer, it is a terrace wine, and pink wines are the most popular for people especially having lunch in restaurants. A challenge is our more unstable climate since the weather drives the róse market."

The Danish market also sees France dominating the scene with Provence and wines from the rest of the Mediterranean coast. Pink wines from the Rhone Valley are gaining importance exactly as German rosès.

"There is only a small market share for Italy, Spain, South Africa and Chile. We start to see more and more German rosé, probably because German wines, in general, get more popular", said Mr. Rydberg.

All persons interviewed confirm that most rosé wine is consumed during summer and as an aperitif. Still, they also mean the consumption pattern is changing, especially among more sophisticated wine lovers.

"Most of the wines are consumed as an aperitif, but more and more Swedes appreciate it to picnics, some light meals, fish and even shellfish," said wine journalist **Johan Franco Cereda**.

"Typically, we drink rosé wine as an appetizer at patio bars and summer events," Pär Strömberg confirmed. "But as we learned over the years, rosé wine with a little more structure is also wonderful to pair with all sorts of food. In Sweden, in summer, we often have a typical Smörgåsbord, (mixed buffé) so a lot of different flavours on the table that might be tricky to combine with the fruity and acidic whites or the tannic and harsher reds – rosé is the player that makes the game work."

Gender and Age. Who Likes Pink Wine?

The younger generations enjoy lighter wines with less oak ageing and alcohol. The rosé category seems appealing to this consumer, but is drinking pink still connected to a specific gender or age group?

"Generally speaking, rosé is for the younger generation," said Pär Strömberg about the situation in Sweden. "And I believe most rosés drunk at premises like restaurants and bars are drunk by a younger, slightly more on the female side of the spectrum. In wine-loving groups of people, I think it is looked upon as a great gastronomic matchmaker, and then the gender doesn't matter at all."

In Norway, Liora Levi is assuming the situation hasn't changed much in recent years. "So there will be more often tables with ladies and girls drinking rosés rather than groups of men," she said. "However, I believe that rosés are quite popular amongst the wealthier population for boat trips and garden parties."

Marius Odland, from importer Nordic, Wine, Beer and Spirits in Norway, said that "Most of the rosé wines are consumed during weekends, from May to August—entry-level, low prices for young people—instead, persons aged 35+ are willing to pay more and explore new products. The older category of consumers does not drink a lot of rosés."

In Denmark, Thomas Rydberg means that the rosè wine category is the only one where women are the primary consumers and buyers.

"All people drink rosé during the season, but we see a majority of consumption by women," he said. "The rosé category is also the only one which a woman mainly buys. I also see that the bottle shape, image, label and so on are far more important than in other wine categories. Another exciting thing is that young people, especially younger women between 20 and 30, who do not drink wine regularly drink rosé during the season."

For the moment France seems untouchable when it comes to the sales of rosè wine in Scandinavia. The small signs of change among a more niched group of wine lovers and opinion leaders that are willing to go for more structured rosè wines from other origins than France might spread to the rest of the population – but it will take time and will need a good deal of communication.


Liora Levi


Thomas Rydberg


Johan Franco Cereda


Marius Odland

Zachariah Hagy, Unsplash

A number of economic and convenience factors, including inflation and uncertainty about the future, are affecting wine sales, but the pandemic is also taking a toll, with alcohol consumption going down and other beverages with low alcohol and low calories going up in sales

CHANGES IN THE MARKET

Some Decline in WINE SALES

By **LIZA B. ZIMMERMAN**

While wine sales in the off-trade channel flourished during the pandemic, they have recently started to lag as restaurants and bars continue to bring back business. A tenuous economy has also encouraged buyers to bargain shop many commodity wine brands at supermarkets where convenience is king and wine and meals can be snapped up together in minutes. Spirits have also continued to steal the show as they can be much less expensive than wine, and many Americans learned to make a good cocktail, or two, at home during the quarantine. What is more, younger buyers, in their 20s and 30s, were never enchanted with the mainstream wine market to begin with, and for them many ready-to-drink (Rtd) beverages in esoteric flavours and portable cans continue to have appeal for casual and outdoor occasions. A handful of wine categories remain resilient in the off-trade, multi-unit sector, according to operators and the Chicago-based Nielsen (Niq). They include Prosecco, a solid and affordable lead into the sparkling wine category; rosé, which many stores have created their own extensive section for which sells well regardless of the weather; and lower-alcohol and lower-sugar level wines, which consumers are interested in because of health concerns and as an offshoot of the sober-curious movement.

At the large, one-unit, Union Square Wine & Spirits in downtown New York City, general manager **Jim English** confirmed that, "Ready-to-drink beverages, natural wines, Pét-Nats and chillable reds have all been eaten into traditional categories." He concluded that, "it is what all the kids [of legal age] are drinking."

Other major retailers agree that market trends are shifting dramatically when it comes to wine purchases in the off-trade. "It seems the wine industry is experiencing its own post-pandemic hangover," said **Cathy Strange**, the vice president of specialty, product innovation and development — which includes wine — at the Austin-based Whole Foods Markets, which has 535 stores in three countries. The chain has made a name for itself over the past decades by continuing to offer a wide selection of organic and sustainable wines before many other chains did. "There seems to be a combination of factors behind this" she added. "Including consumers returning to their pre-pandemic drinking habits and/or choosing to drink less overall while looking for better-for-you [Bfy] options when they do."

The buyer at the 200-plus unit Houston, Texas-based Spec's Wine, Spirits and Finer Food chain, which has locations all over Texas, agreed.

"The pandemic changed buying habits and patterns," said **James C. Barlow,** one of the chain's fine wine buyers. "Compound that with inflation, the customer has had to become savvier in their choices."

The General Data

According to a spokesperson from Niq, the noted national data provider that tracks the off-trade sector, wine sales overall are "down on 750-ml. bottle unit sales; this is likely due to inflation, as average unit prices of 750-ml. bottles of wine have increased by three percent. Pretty much every varietal has seen a decrease in unit sales over the past year. A broader trend we're seeing is consumers switching up their stores and channels to get a hold of better prices." Niq data in the *2022 Year in Review* also tracks the total off-trade beverage alcohol dollar sales in 2022 at $89.6 billion, an increase of 0.9 percent, in terms of dollar growth, over the previous year. In the same time frame, beer, flavoured malt beverages, cider and seltzer increased by 2.2 percent. Total spirits sales were up by 1.3 percent and total wine sales were down by 2.4 percent.

Sales Decreases and Economic Constraints

Some of the downtick in off-trade wine sales can be attributed to ongoing economic concerns.

Jim English

Cathy Strange @ Whole Foods

James C. Barlow

"Our wine sales are flat at best, but categories and price points are changing dramatically over the last few months," said **Charles Sonnenberg,** the owner of three large Frugal MacDoogal wine store locations in South Carolina and Tennessee. He added that entry-level buyers, focused on under $10-a-bottle purchases, want to buy wines at the cheapest prices that they can. He notes that, "these wines have become complete commodities."

The Rtd phenomenon has also strongly taken hold in Sonnenberg's territory. He said that "the explosion of [malt-based] Rtd drinks has taken entry-level drinkers away from wine."

With the reopening of the on-trade in a still-shaky economy, many retailers say consumers are shying away from copious spending on lavish trophy wines, shares Sonnenberg. When dining out, he also notes that dinners are shifting their spending to spirits at the expense of wine.

Supermarkets are also continuing to give independents a run for their money. The major US wine chains rarely talk to the press and Target, Walmart, Costco, Total Wine & More, Safeway and Albertson's all declined to respond to questions for this article or didn't respond to calls or multiple emails. None of the other chains, and multi-units, interviewed were willing to comment on their sales revenue. Independent retailers in many states, see sidebar on supermarket sales in New York State, have fought to prevent wine sales by chain and big-box stores in their markets. Two of the biggest holdouts have been the very populous states of New York State and Texas. As a result of keeping supermarket wine sales out of the picture, serious independents have created a very dynamic wine market – not dimmed down by the limited convenience of core sets in supermarkets – often dominated by both large and small stores with vibrant and specialized selections. Colorado was a state that fought a long-lived battle to keep the wine out of supermarkets that it lost three months ago.

David Bentley, the general manager of the large, 10,000-square foot, one-store Argonaut Liquor based in Denver Colorado — which carries 10K SKUs of wine, said that his biggest competition is now grocery stores. He noted that competition has increased exponentially given the convenience factor of supermarket sales.

"If the price is the same, why would they drive across town?" he asked. He added that constantly increasing gas prices don't encourage customers to make an additional trip across town. In general, he said that he has seen a skew to more spirits and beer consumption with the bulk of the store's sales going to spirits at 44 percent of his total sales, compared to just 35 percent for wine. He said that spirits sales started to overtake wine five years ago.

The Category Survivors

Prosecco, rosé and wines considered to be healthier have continued to do particularly well in a changing market. Health is top of mind for US consumers, even when it comes to alcohol. Over the last two years, sales of BFY wine products grew 35 percent, according to a January 12, 2023 report from Niq. It read that "wine is still a relatively small branch of total wine sales in the off-premise channel, but it's growing fast. During the 52 weeks ending December 3, 2022, sales increased by 10.1 percent."

According to Niq, in the off-trade market in the 52 weeks ending December 2022, $685.9 million dollars were spent on Bfy wine. The last category includes wines billed as low alcohol with lower sugar content as well as natural wines, which ironically gravitate to two different sides of the consumer preference and sales spectrum: the very knowledgeable for natural wines and the inexperienced for sugar content, which is generally low in dry wines. Some of the defining factors for the Bfy category, as reported to Niq, don't necessarily make sense for the wine sales category. The two most egregious include being free from high-fructose corn syrup, a new category; and having less than 100 calories per serving, at an increase of 132.6 percent of the fastest-growing attributes states on Bfy wines. The other factors included were being certified for European Union organic farming as well as bio certified. At Argonaut, Bentley dedicates a massive aisle to just rosé wine as well as an entire cold box. He is not alone in feeling the love for rosé. According to data from the year ending in October 2022, Niq reported that $674.9 million dollars was spent on rosé wine. While the category was down in the off-trade, by 6.3 percent, it still accounted for 3.4 percent of total wine dollar sales. Many stores have created separate sections for rosé sales and also feature them in coolers conveniently located at the checkout. Argonaut has also seen upticks in healthy wines with less sugar, such as the new LightHearted Cupcake brand; Pét-Nats and natural wines among younger buyers.

Over at Whole Foods, Similar Trends

"Generational reporting shows that Millennials and Gen Z are

Charles Sonnenberg

David Bentley

drinking less alcohol overall and we are seeing significant trading into non-alcoholic beer and Rtd cocktails from all categories. The most notable wine salt industry-wide declines are coming from still rosé. These customers are trading into other sub-categories categories in wine like sparkling, orange, canned wines and into other categories altogether like Rtd."

Data from Niq confirms these choices, noting evidence of healthier choices and a consumer desire for transparency. The Niq *2022 Year in Review* report adds that, "Consumers want to live and consume in a sustainable way, while companies look for ways to increase their social responsibility."

Prosecco remains a great value choice and an opener into the sparkling wine world. At Spec's, Mr. Barlow noted that, "Sparkling wine is doing especially well with Prosecco continuing to surge. The market is becoming flooded with Prosecco now, so the retailer must be cognizant of finding good partners to continue the pattern. Champagne is still selling well although the price increases will probably flatten some of that trend."

Overall, the off-trade sector has been experiencing some bumps as it continues to lose market share. However, with a handful of strong new wine categories, the big players may well be able to pull ahead by dedicating more space to them and educating their customers about other noteworthy wine categories.

TWO LAW PROPOSALS IN NEW YORK STATE

Independent Wine RETAILERS FIGHT – Once Again – to Protect Their Turf

Independent retailers have so far dominated the wine market in New York, but there is an effort to open up to supermarket sales. The new proposals are met with fears of small businesses' closures and a concentration on a few big brands, but also with some optimism

By **LIZA B. ZIMMERMAN**

Every few years the deep-pocked, New York State Supermarket lobby reaches out to local politicians to entice them to allow wine to be carried in the state's hundreds of grocery stores. For decades, only independent retailers have been able to carry wine and spirits while supermarkets sold beer. The state's diverse independent market has combated long and hard to prevent sales of wines in chain stores as it is likely to make a large dent in their market share and cause a number of smaller stores to close. Big box chains and multi-units, that have long sold wine on the West Coast, have done little in terms of bringing wine diversity to their markets. In all fairness, they have long been constrained by the volume of wine they need to stock their shelves and pesky core lists, which dictate a huge number of brands that need to be available in all their locations.

The New York City wine market has long had a diversity and a vibrance that few markets on the West Coast — one of the areas where wine is sold in supermarkets — can rival. While in the West Coast states, which are ironically home to the bulk of the best domestically produced wines, big corporate brands rule at most supermarkets, because of the volume they produce. Beyond core sets, where certain brands are mandated, there tends to be limited selection on their shelves as a factor of space. A store that sells meat and light bulbs can only dedicate so much space to its wine selection. Many in the industry think that wine will eventually be sold in the supermarket.

© Guillemette Barbet

David Bowler

David Bowler, the owner of the New York City-based importer Bowler Wine, thinks that supermarkets will eventually win this battle. What is more, he believes that some small retailers will suffer, "Yes, eventually, but not the carefully curated ones that offer good customer service."

The convenience factor that allows shoppers to buy everything at once continues to be a strong pull for consumers in a car-focused, recently less-than-stable economy where almost everyone feels time crunched. Not everyone wants, or needs, the help of an attentive clerk on a sales floor at an independent store and frankly many customers still feel intimidated by the experience of walking into a fine wine store.

Liz Kruger

The Bills

Two bills, sponsored by a number of New York State legislators who mostly did not get back to me for this story, are slated to go into committee and be voted on in the next couple of months. New York Senator **Liz Kruger**, one of the sponsors of one of the bills, said that this decision is "a basic issue of consumer choice and convenience."

Over the course of the past decade, supermarkets have pushed to carry wine, and the bulk of independent retailers have said they think many of them would be put out of business if this happens. Albertsons, Walmart, Amazon and Costco all declined to comment.

Michael Correra

Big box stores always want to extract more revenue from the pie, according to **Michael Correra**, the executive director of the Metropolitan Package Association, which represents 3,500 stores in the state of New York. He added that the state has a huge selection of wine and calls the current bills "just another sign of corporate greed." Local retailers are equally concerned.

"It is the little corner shops that are going to get hurt first," said **Jim English**, the general manager of the one-location, Union Square Wine & Spirits in New York City. He added that, "the supermarket is never going to compete on selection."

The Perspectives

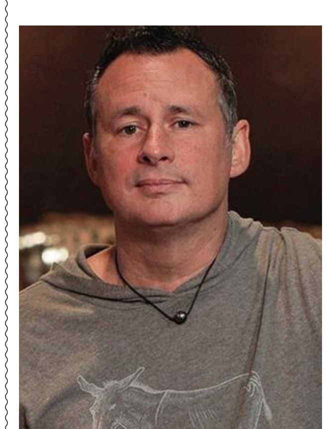
Bills to allow sales of wine in New York supermarkets have been proposed many times before. New York is also unique because it has typically only allowed one store per owner, so large independent wine chains - as seen in Texas - never flourished there. State legislators have permitted wine sales supermarkets in states such as Colorado, as recently as this year, which also had a one-store per owner rule on the books. The new law passed there in March of this year, so it is too soon to tell what effect it might have on independent stores' viability and brand selection. Some importers and producers aren't convinced that allowing wine sales in supermarkets will change much about New York State wine sales dynamics.

"There is a lot of lobbying on both sides of the issue," noted **Mark Snyder**, the owner of Angel's Share Wine Imports, an importer and distributor based in Brooklyn, New York. "Wine shops are obviously against it and I think the large distributors are for it [as well as the supermarkets of course]. I guess we will see which lobbyists have the best stamina, money and power."

He added that allowing so many supermarkets to carry wine "overnight would certainly impact stores based on the sheer volume."

"What would likely happen is that the large distributors would wildly dominate the supermarkets and completely shut out the small distributors and they would increase their pressure on shops as well by leveraging spirits purchases, making small distributors struggle as well," he explained. As a result, "access to smaller brands I imagine would greatly diminish," he said.

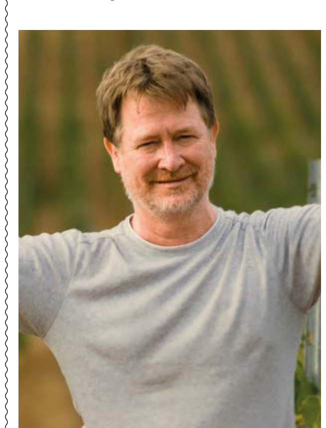
However, some smaller wine producers think that moving the bulk of big wine brand sales to the commercial supermarket arena might actually help consumers focus on smaller labels in wine shops.



Mark Snyder

Douglas Stewart, the winegrower of Lichen Estate, a 1.500- to 3.500-case production case brand in the Anderson Valley in Northern California, said that "having big players migrate to supermarkets would help our sales in boutique wine stores most likely, on two levels."

The two ways he sees the move to supermarket sales helping the overall wine market are by growing the wine market as a whole and "the rising tide raises all boats sense." The big players make reliably decent wines at affordable prices, which "most people expect to drink with dinner on a Tuesday night. They're trying to be reliably good and affordable. That introduces people to wine," he said.



Douglas Stewart

The second benefit, for Mr. Stewart, comes from the fact that "the big players are driven in the market by deals — discounts, shelf-talkers, end caps, pricing — to drive volume. The big players have the advantage of volume on the production side, but it takes layers of sales managers on the winery side and distribution side to sell a million cases of wine, to sell bottles at half off of retail at best."

He noted that large chains like Safeway and Albertsons "are a good outlet for the million-case brands and not much else. They don't sell brands like ours. Great wine retailers do. Great restaurants do. We do not compete head-to-head with the KJs, Gallos, Constellations, et al. A $50 to $75 California Pinot [Noir] doesn't generally sell in a supermarket."

Kendall-Jackson declined to respond to questions for this story. Mr. Stewart thinks that regardless if wines are sold in supermarkets in New York State, that there will be room on the market for brands of all sizes.

"There are brands that straddle these two worlds, but not many," he said. "Certainly, few of our size, quality and price points. We rely on the wine stores that have well-educated sales people."

Mr. Bowler, the importer, agrees that if the bills pass smaller brands may not suffer. He shares his belief that selection will probably not "change much. Many of the smaller shops, the typical corner stores, already only sell products from the big distributors. So, it may actually improve."

In the end, Mr. Stewart of Lichen thinks, as many of us hope, that it will all pan out well for most domestic producers whether wine can be sold in supermarkets or not.

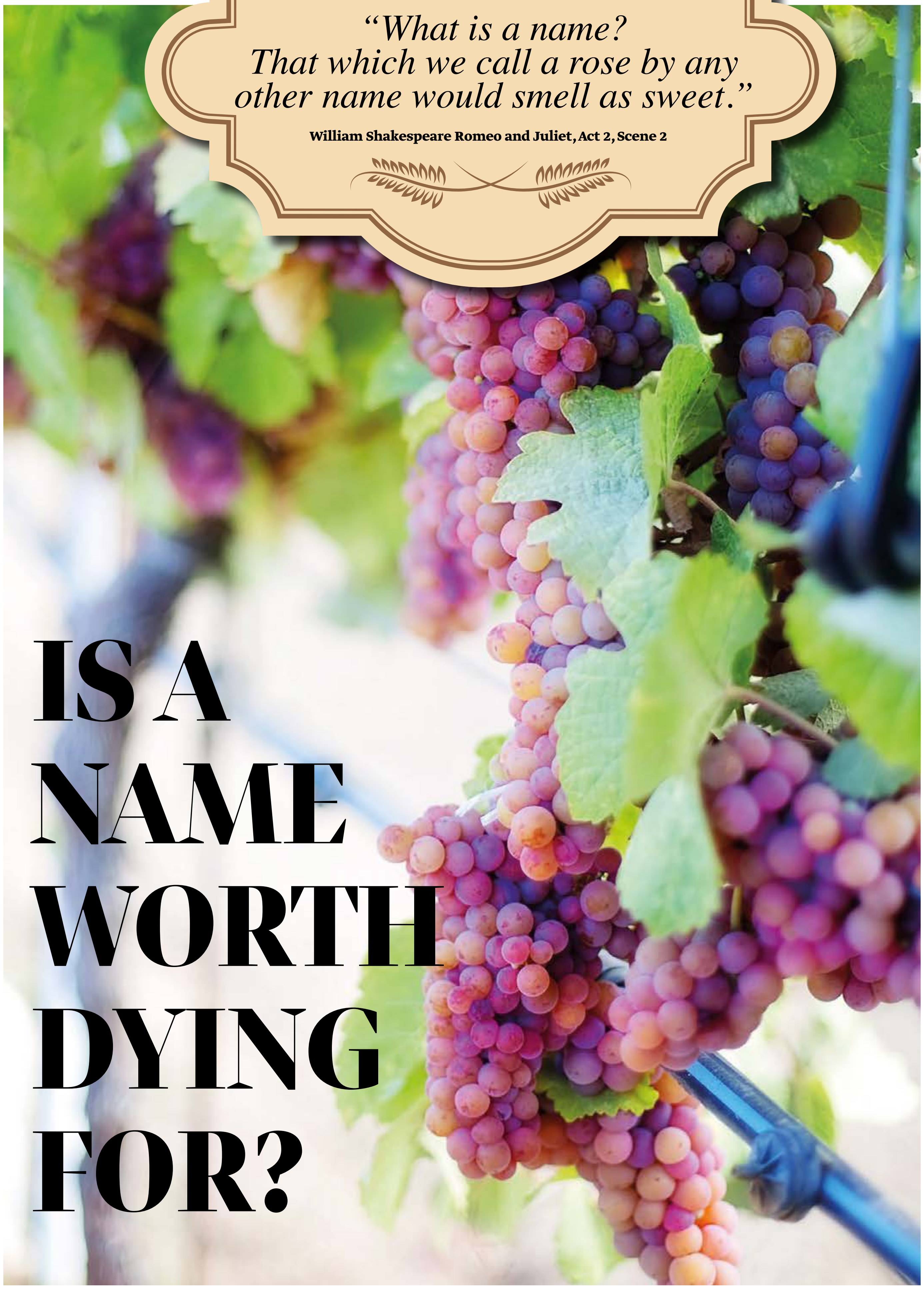
"In California, I think of customers getting introduced to wine when they buy the $9.99 Pinot from Safeway," he said. "It might have been Pinot [Noir] in a box. They like it and buy a $14.99 Pinot [Noir] in a bottle. They like that and go crazy with a $24.99 Pinot from La Crema, a million-case brand. Now hooked and maybe five years older and wiser and with a little more spending power, they think about going to a wine store and asking for some advice on the bafflingly large and unfamiliar selection of California Pinots. That's where they meet us."

His perspective is probably in line for how most successful, small-production wineries see the retail market. However, emerging wineries without extensive contacts with boutique retailers and the right distributors may not have it so easy if the New York State Assembly allows wine sales in supermarkets. What is more, many of the smaller shops may no longer be around to support them in their journey to market.

CULTURE MATTERS, AND SHOULD NEVER BE UNDERVALUED, ALSO FOR ITS COMMERCIAL IMPACT

IS A NAME WORTH DYING FOR?

With the SAVE Act proposal, the American food and wine sector is aiming at discussing a series of protections requested or imposed by big producing countries, like Italy and France, on "common names" given to products. It is a path full of questions and risk, as the President of the National Association of Beverage Importers explained



> *"What is a name? That which we call a rose by any other name would smell as sweet."*
>
> **William Shakespeare Romeo and Juliet, Act 2, Scene 2**

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

Common names, country names, unique names, and family names, as Juliet laments, have real world consequences, as do traditional names and historic names. Names are implicated in wars. The Treaty of Versailles ending World War I restrained the use of the name "Champagne" by the defeated Germany, hence the name "sekt." (Article 275 of the Treaty required Germany to recognize the regions set by the country of origin, which is a further refinement of the Treaty of Madrid of 1891.) Between 1986 and 1994, the international negotiations on agreements that are collectively the foundation stones of the World Trade Organization (WTO) included vigorous debate over the provisions on geographical indications found today in the Agreement on Trade-related Aspects of Intellectual Property (TRIPS). The TRIPS Council continues to struggle with the implementation of a key provision in Section III, on the establishment of a register of GI names of wines and spirits. Fundamental differences between the United States and the European Union on the precise intent and function of the register remain unsettled, nearly 30 years after the initial ratification of the WTO agreements.

As wine and spirits industries arose in many countries and global trade brought these products to the markets of other countries, a clash of names was inevitable. Solutions and resolutions were adopted in legal frameworks and by international negotiations that created generic names, semi-generic names, distinctive geographical indication names, and trademarks denoting origin. The Lisbon Agreement for the Protection of Appellations of Origin and their International Registration (1958) appellations of origin receive in the 40 member states when they are protected in their country of origin. countries, but not the United States, was one attempt. On a global trade level, in the TRIPS Agreement, section II on trademarks and Section III on geographical indications aspired to resolve these clashes and specific clashes were resolved in the Wine Accord of 2006, signed by the United States and European Commission including an exchange of letters. Australia, New Zealand, South Africa, Chile, Argentina, and Uruguay, among other countries, have negotiated similar agreements with the European Commission. A peace or relative peace was achieved. No one has died for a name since the end of World War I. Until now, perhaps.

Robert M. Tobiassen

A New Legal World with Old Trade World Implications

In mid-March 2023, a bipartisan bill was introduced in both the House of Representatives and Senate of the United States. Senator John Thune (R-S.D.) and Representative Dusty Johnson (R-S.D), along with other co-sponsors who are Democrats and Republicans, introduced the Safeguarding American Value-Added Exports (SAVE) Act, legislation to protect American food products from unfair trade practices by foreign countries. If enacted into law, this bill would significantly impact the Biden-Harris Administration's trade policy and there is no indication of White House support for this effort at this time.

According to the lead sponsors,

– "By exploiting valid geographical indication protections, global competitors have for decades tried to limit competition, block imports, and restrict American-made products from being able to use common food and beverage names," said Mr. Thune. "I'm proud to lead this effort in the Senate to help level the playing field for U.S. producers by ensuring they can use common food names and preserve and expand foreign market access for their products."

– "Requiring U.S. producers to change the names of their food is confusing for consumers and costly to producers and manufacturers," said Mr. Johnson. "The SAVE Act ensures American producers retain vital access to foreign markets in a time that may be more critical than ever."

The bill covers agricultural commodities and food products, which encompasses wine, distilled spirits, and beer/malt beverages. There is a specific provision on wine addressing wine grape varietal names and traditional expressions. But the bill still covers wine, spirits, and other beverage alcohol products under its general provisions.

The Secretary of Agriculture is given jurisdiction or competence to implement and administer the new law. However, the Secretary is required to coordinate with USTR on negotiating trade agreements with other countries that protect the export abilities of U.S. producers of the covered products with the "common names." No roles are given to the Alcohol and Tobacco Tax and Trade Bureau (TTB), Department of the Treasury and the Trademark Office, Department of Commerce. Both agencies traditionally and regularly provide technical assistance to USTR on TRIPS issues at the WTO.

This explanatory statement appears in several press releases by Congressional supporters of the bill:

"Common food and drink names such as parmesan, chateau, and bologna are used around the world to describe products to consumers. However, due to geographic indication to European locations, the European Union has begun using economic and political influence to implement unfair trade practices under the guise of protecting geographic indicators. These unfair trade practices have the potential to block United States agricultural products from being sold in international markets."

The U.S. dairy industry is quoted in several press releases but the bill is not limited to dairy products. Many congressional sponsors of the bill are from major dairy States.

Frontline Concerns and Questions:
This bill ignores the existence and potential impact of many existing international agreements that cover these "common name" topics.
- "Common names" are called "generic name" or "common name" in many international agreements.
- The Agreement on Trade Related Aspects of Intellectual Property (TRIPS) at the World Trade Organization has detailed text and obligations of the question of generic, that is, "customary in the common language as the common name of the goods or services in the territory of that Member." TRIPS, Article 24.6. The bill uses some language that is similar to that used in TRIPS but does not explain why the TRIPS articles are not sufficient trade protection.
- The U.S. and EU signed a Wine Accord Agreement in 2006 that governs many of these names for wines.
- The U.S. and EU signed a Distilled Spirits Trade Agreement in 1994 that covers these names for certain European and U.S. distilled spirits.
It is unclear how these existing international obligations of the United States will be impacted by the new list of "common names" designated by the Secretary of Agriculture. Given both TRIPS and the proposed SAVE legislation both use the term "common name," it has to be determined how these two legal documents will interface.

The "Common Name" Determination Process by the Secretary of Agriculture.
Turning to the proposed SAVE Act legislation, the term "common name" means a name that is ordinarily or customarily used for an agricultural commodity or food product and such common name is typically placed on the label or package of that commodity or food product. For wine, the law expressly includes as a "common name" the name of a grape variety or a traditional term or expression that appears on the wine label or packaging. However, names of American Viticultural Areas cannot be determined by the Secretary of Agriculture to be "common names." The "common name" action must be consistent with the standards of the CODEX Alimentarius Commission. Moreover, the proposed SAVE Act legislation expressly lists the categories of research resources that the Secretary of Agriculture may rely on in making the "common name" determination. Importantly, nothing in the proposed SAVE Act legislation requires the Secretary of Agriculture to seek public input and comments in making this determination. Although nothing prevents the Secretary of Agriculture from seeking public comments. Finally, the United States Trade Representative and the Secretary of Agriculture are directed to negotiate with our trading partner countries to ensure that the export of these agricultural commodities and food products bearing these common names are not hindered or prevented from entering the other country's market.

Potential Impacts on U.S. Importers and Foreign Producers
For U.S. importers and their foreign suppliers, this bill on its face should not limit the wines, distilled spirits, or beers/malt beverages that you import from other countries because its goal is to improve and expand U.S. exports of agricultural and food products. There are, however, several potential adverse trade outcomes that could impact U.S. importers and their foreign suppliers.
- The EU and other trading partners may impose trade sanctions against the U.S. depending on the final list of "common names." In turn, the U.S. would likely retaliate.
- Member countries of the World Trade Organization may seek consultations and then initiate a dispute settlement proceeding against the United States, as was done in the Boeing tariffs by the EU.
- Competition may increase in the arena of the geographical names or designations of products that you import because the final list may enable U.S. producers (and producers in other countries) to use names that today are limited to the country of origin.
- Simply put, there is a lot of unknowns here. This is where trade associations help you follow and understand proposed legislation. Also, this deals with global trade so as industry members you should alert your agriculture and trade government officials in your home country and ask for strong communication bridges on this matter between these officials and their Embassy's counselors and attachés in Washington, DC.
NABI is not aware of the specific domestic interests (except for the dairy industry) that are pushing for passage of this bill. The sponsors and cosponsors of the bill from certain States may lend some insights. The bill was led by Representatives Dusty Johnson (R-S.D.) with co-sponsors Jim Costa (D-CA), Michelle Fischbach (R-MN), and Jimmy Panetta (D-CA) in the House and Senator Thune (R-S.D.), Tammy Baldwin (D-WI), Roger Marshall (R-KS), and Tina Smith (D-MN) in the Senate. California and Midwest States agriculture is clearly represented here. Moreover, as explained earlier in this article, the U.S. dairy industry is pushing hard for this bill to become law.
One possible reason for the U.S. industry wanting this bill could mean that such industry is not "happy" because they perceive that the White House or Executive Branch is not doing enough enforcement work to gain the existing protection for "common names" provided for in TRIPS. If enacted, the SAVE Act legislation would give the U.S. industry another way to push the Federal Government, in general, and USTR, in particular, to affirmatively demand our TRIPS rights on the use of these common names in international trade. Congressional debate in the committees and on the floor of each chamber of Congress will give us a fuller understanding of the political rationale and purposes for this proposed legislation.

Final Thoughts and Future Thoughts
In the aftermath of the enormous bloodshed of "the war to end all wars," the French remembered to protect the name "Champagne" – likely the most treasured and widespread product name found across the globe and linked to France. Proposed legislation like the pending SAVE Act bill must be examined carefully and handled cautiously less a new trade war is started.
Culture counts and should never be underestimated in any business deals, family relations, social norms, and, yes, even in international trade. The stronger the cultural link then the harsher the trade war. But cultures are diverse and encompass traditions, history, commercial driven efforts, rural and urban experiences from which formal and vernacular language grows. Central to that growth are the "names" given. The tragedy of Romeo and Juliette in Verona (the home of Vinitaly 2023), echoes that people sometimes will die, needlessly, because of a name.

Please note that the views expressed in this article are those of the author and do not represent the positions of the National Association of Beverage Importers (NABI).

JAPANESE Thirst for Sparkling Wines

CONSUMPTION IS ABOVE THE PRE-COVID LEVELS

By MARI YASUDA

While still wines are struggling again, bubbles are conquering Japanese drinkers and wine lovers. Champagne keeps dominating the market thanks to its authoritativeness and value, but also Franciacorta and somewhat Prosecco– respectively for the higher-level and lower-level markets– are doing well. Cava is instead still trying to shake away the label of low-level bubbles

Japan's import volume of sparkling wines continues to grow. Though it dropped in 2020 due to Covid-19, it consequently increased in 2021 and it reached a record high of 44.4 Comillion litres in 2022. This is in contrast to the import volume of still wines which finally increased in 2022, but it has not reached the pre-Covid-19 results yet. The top three countries from which Japan imports sparkling wines are France, Spain, and Italy, with these three nations accounting for 91% of total import volume.

Good Sales of Premium Sparkling Wines

Enoteca Co.Ltd., who import, wholesale and retail mainly fine wines from the world, handle a wide price range of sparkling wines from €7 level in retail to the prestige Champagne.
Koichi Kaino, Managing corporate officer of marketing and merchandising division of Enoteca, said that," Sparkling wines are generally doing well, the sales of premium price sparkling wines such as Champagne and Franciacorta, which are the main players in restaurants, are especially doing well in accordance with the considerable recovery of on-premise channels since last year. It can be seen that, after the Covid-19 crisis, people want to drink something better both at home and at restaurants. This kind of appetite perhaps supports good sales of premium price sparkling wines."

Incredibly Strong Demand for Champagne

According to the Comité Interprofessionnel du Vin de Champagne, Japan is the third largest export destination. The shipments to Japan recovered sharply after dropping in 2020, and the export results of 16.6 million bottles and €432 million in 2022 are the highest on record in terms of both volume and value.
"Even without the Covid-19 crisis, Champagne's exports to Japan would have increased steadily, and I think the result would have been the same," said **Makoto Abe**, Japan's best sommelier in 2002. Mr. Abe has opened several restaurants specializing in Champagne including a Champagne bar "Salon de Champagne Vionys" in Ginza, Tokyo. He currently actively performs as a wine consultant and as a broker, connecting overseas wineries and Japanese importers. Mr. Abe observed that "Champagne lovers are clearly on the rise. For example, new champagne lovers are coming to Vionys. If anything, there are more women, and it seems that the age is over 40 years old."
Champagne sales in Japan are driven by hotels, fine restaurants and night markets. Mr. Abe added that "Moët & Chandon is the most popular brand in the night markets, and Dom Perignon for the luxury clubs. Krug, Belle Epoque or Louis Roederer Cristal are also popular. There was a shortage of these prestige cuvées, including Moët, but night markets found out the shops who kept the stock of these cuvées and bought them. There was also a significant price increase; however, they stuck to these brands."
On the other hand, general consumers act differently.
"For the items that have risen in price, consumers tend to look for other brands," he said. "I have been a brand ambassador for Champagne Palmer since August last year. This brand has only been in Japan for just two and a half years. However, this year's sales target was already revised upward. One reason is that people look for alternatives of Moët."
To the question on why is the demand for Champagne so strong, Mr. Abe replied that "Japanese people's awareness of Champagne has risen to an incredible extent compared to 10 years ago. Another reason may be the strong brand power of Champagne houses."

A Polarized Cava Market

According to D.O. CAVA, Japan is the sixth largest export destination. In 2022, 11.1 million bottles were exported, up 3.6% from the previous year. Su Koruni Wine Co., Ltd. has been handling Spanish wines for over 20 years, and is one of the few importers in Japan specializing in Spanish wines, and also sells them online. **Kunihisa Saito**, General Manager of Sales of Su Koruni Wine explained that, "Unlike Champagne, Cava does not have a strong brand power. As a result, it is easy to get involved in price competition. It is also true that the concept of 'cheap and delicious' still dominates. The Cava market in Japan is polarized: mass-produced cheap Cava and those that are not. Our standard cuvée starts at a minimum of €20 in retail, which makes a clear distinction from the cheap Cava."
According to them, Standard Cuvée is mostly sold to retailers, while Reserva and Gran Reserva are sold to restaurants. "We are conscious of breaking out of the price competition by clarifying the characteristics of our products under the keyword 'Cava that you want to talk to someone about'," Mr. Saito continued. "For example, Cava made by biodynamic method, those used for the Spanish royal wedding, or those in limited quantities in amphora-shaped bottles. In general, hotels, high-end restaurants, and night markets don't handle Cava because they want more expensive wines. Our Cava has a price range as high as Champagne, it has a story to tell and it has a sufficient quality to meet the expectation; as a result, we are able to penetrate these routes."


Koichi Kaino


Makoto Abe

Steady Growth of Franciacorta

According to Consorzio Franciacorta, Japan is the second largest export destination with a record of 353,000 bottles in 2019. After dropping sales due to Covid-19, it returned to 319,000 bottles in 2022. According to **Foodliner Limited**, which has a history of more than 50 years as a specialized importer of Italian wines and foods, "Franciacorta is selling well despite the increase of price. Not only standard cuvées, but also highly-priced ones such as Riserva or Millesimato are doing well."
Mikoto Matsuda, shop manager of "Il Calice, Vini Italiani & Formaggi," said that Franciacorta has a good demand as a gift. Il Calice is a shop specialized in Italian wines and cheeses with around 20 years' of history. It is located in Yokohama city which is the second largest city after Tokyo's 23 wards.
"For Franciacorta, we prepare the largest number of items at around €40 in retail, and they are mostly for drinking at home," Ms. Matsuda said. "At around €67, mostly they are for presents or for special occasions such as anniversaries. Highly-priced Franciacorta is also moving wholesale to restaurants."


Kunihisa Saito

Prosecco on the Rise

According to the Consorzio di Tutela del Prosecco DOC, the export volume of Prosecco DOC to Japan in 2021 was 2.5 million bottles. This volume is limited compared to that exported to Europe and the United States. However, the export volume to Japan in 2011 was 1.2 million, so it has doubled in 10 years. The export volume of Conegliano Valdobbiadene Prosecco DOCG to Japan in 2022 was 407,000 bottles, according to Consorzio Tutela del Vino Conegliano Valdobbiadene Prosecco. Foodliner pointed out that "Prosecco is doing well in the low price range, but is more difficult to sell in the high price range such as DOCG".
Ms. Matsuda of Il Calice confirmed this view. "Prosecco is getting more and more popular," she said. "Most of our customers are in their 40s and 50s, but the younger generation also knows Prosecco and there are quite a few young women coming to ask for Prosecco. Customers don't care about DOC or DOCG. They choose Prosecco by price. We don't handle very cheap Prosecco, and the best selling price range is about €16. If it exceeds €20, it is honestly difficult to sell."

A Semi-sparkling Wine is Becoming Popular

The data for semi-sparkling wines is not included in the statistics of sparkling wines.; however, it is getting popular. It seems suitable for the hot and humid Japanese summer. Mr. Saito of Su Koruni Wine pointed out that "Originally, we had a request for orange wines from casual restaurants and Spanish bars. As we found a good quality Txakoli orange, we imported it, and the wine is selling well".
Ms. Matsuda of Il Calice observed the same phenomena. "A few years ago, we introduced a light semi-sparkling wine of Sicily for the summer season only," she said. "It has become popular to chill and drink it in the summer. One reason for this popularity is that many people want to feel refreshed in the heat, and this type of wine is suitable to drink casually at home. Natural, unfiltered, cloudy, semi-sparkling wines are also becoming popular."
The concern for the future is the price increase, but a hot summer is approaching, and bubbles are likely to become even more popular in Japan.

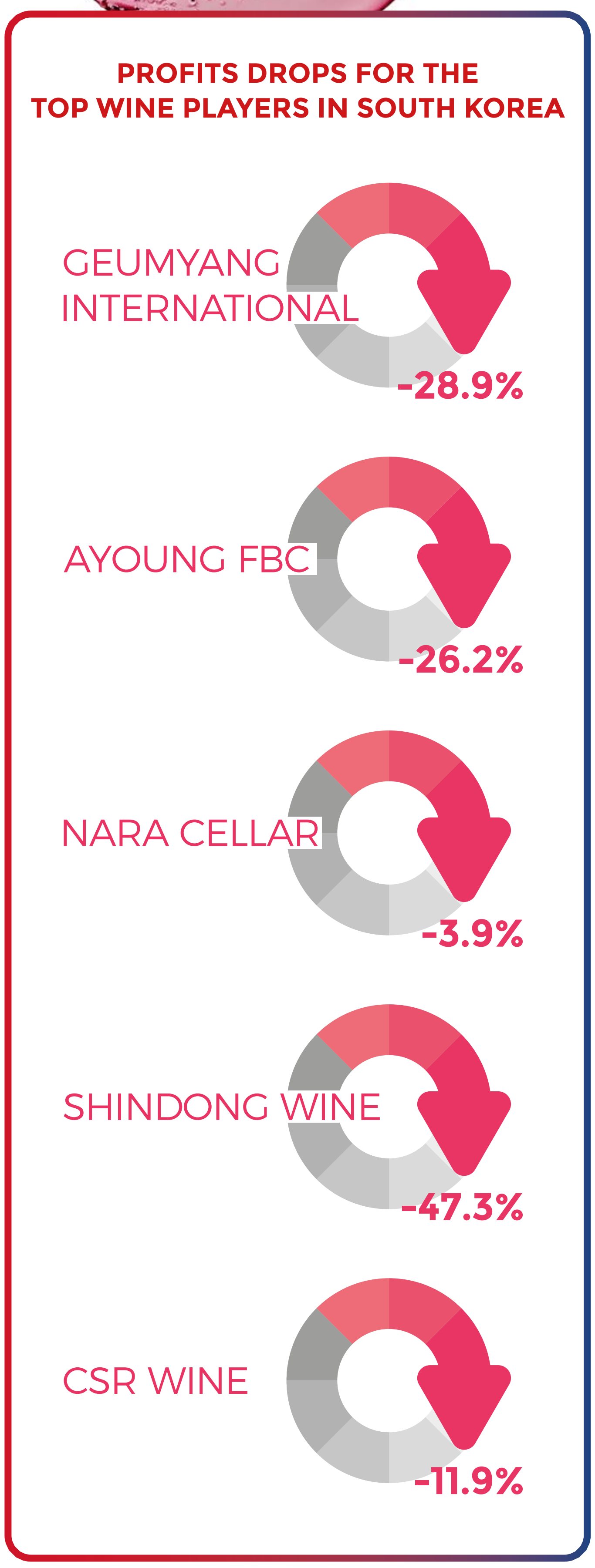

Mikoto Matsuda

HAS THE WINE BUBBLE BURST?

Worries and Readjustment Theories Mix in the SOUTH KOREAN WINE MARKET

The market is slowing down drastically in terms of volumes, and sales channels are taking the hit. Many players see it as a "normal" phase of readjustment after the consumption explosion during the pandemic. South Korea is yet a destination for premium wines, signs show

By **MI YEUN HONG**



2022 Results by the Financial Supervisory Service

According to the Financial Supervisory Service's disclosure on the 24th of May, Shinsegae L&B, the leader in the Korean wine industry, recorded 206.4 billion won (160 million USD) in sales and 11.6 billion won (8.9 million USD) in operating profit last year. Compared to the previous year, sales increased by 3.2%, but operating profit plummeted by 45.3%. This is due to an increase in the cost of sales, distribution, and administrative expenses. During the same period, the operating profits of the five companies following Shinsegae L&B in terms of sales, also saw their operating profit decreasing. A salesperson at a South-Korean conglomerate, who requested anonymity, confirmed that 36 of the 160 wine shops he manages were closed in the last year, from June 2022 to May 2023. Is there a change in the perception of the Korean market? Is this the end of the Renaissance of the Covid period where imports increased by 229% between 2019 and 2021?

A Worrisome Situation

"During the COVID-19 period, on-trade wine consumption was almost non-existent due to restaurant business restrictions, but the off-trade wine market achieved tremendous growth," said **Jae-Won Chon**, CEO of Vinideus. The Former Hotel CEO, a native of Oregon and a wine expert, has been leading Vinideus, an American specialty wine importing company, since 2007.

"But with the onset of Endemic, the opposite is happening," he said. "While the growth trend of the on-trade is remarkable, the overall volume of wine consumption has not increased significantly. This is because wine consumption, which was purchased at supermarkets or wine shops to be enjoyed at home due to endemic, is now gradually decreasing due to the activation of the restaurant market. On the other hand the main consumer group, in their 30s and 40s, spends money elsewhere, such as travel or rising household debt due to interest rate hikes. As a result, the demand and desire for high-end wine has increased and the focus has shifted away from cheap wine, in favor of high-priced wines. The still increasing sales of Champagne and Bourgogne wines show this."

However, Mr. Chon cannot hide his concerns.

"There are clearly stocks that are piling up because the products of new importers, which were created rapidly during the pandemic, are now unable to find sales channels due to endemic," he explained. "It is likely that these wines will stagnate in the market for a long time, and one reason is that the consumption patterns of mainstream consumers are now shifting from wine to other types of alcohol (sake, whiskey, traditional liquor, etc.)."

Mr. Chon anticipated the future.

"For the time being, the consumption of cheap wine will continue at large discount stores, although not as much as during the pandemic," he said. "However, sales volume should be declining rather than increasing. Due to fierce marketing and pricing policies of hypermarkets and large wine outlets trying to survive in this environment, small and medium-sized wine shops and chains that sell mainly at low prices are expected to struggle. And it is expected that many small and medium-sized shops will close due to these market changes."

"Importers are also expected to face a slightly more difficult environment due to uncertainties in the global economy," he added. "Interest rate hikes, rapid changes in exchange rates, and rising local wine prices due to the war in Ukraine and friction between the US and China. It looks like we will go through a tough time."

Signs of a Fall

Sung-Ho Shin, director of Nara Cellar, the only wine company listed on the Kosdaq for the first time in early June, sees growing pains. Established in 1997, Nara Cellar is one of the Big Five in the Korean wine industry, with sales of 107.1 billion won (83.2 million USD) last year and a market share of 11.4% (in terms of imported value) as of 2022. Mr. Shin works as the director of Nara Cellar's Wine Culture Lab, and is an all-round wine expert with 22 years of experience, as well as the record holder for the largest number of Korean wine events in Korea.

"Until the end of last year, everyone enjoyed growth, but in fact, there were signs of a fall," he said. "The numbers were fine, but it felt like it was getting a little harder to do business. As expected, all importers, including us, have lost more than 20%. This number can be compared to the Lehman Brothers crisis in the past. At that time, sales fell 30%, and that situation lasted for more than two years."

"After the Coronavirus broke out, and when this became an issue, sales fell by 30% instantaneously," Mr. Shin said. "From what I've seen, when something happens in Korea, sales drop by 30% and that seems to be the bottom."

"So, I asked the salesmen," he said, recounting his experience. "How long will it take you think before things improve? Most of the employees say that it will be likely by the end of this year. Other importers say that it will only improve by next spring or so. However, when it comes to inventory issues, it is difficult but bearable. If you endure this and recover after a year, you can say that you went on a diet for a while. However, even if this lasts for 2 or 3 years, it can be seen as a process of running for a more mature market once again."

Mr. Shin compared the Korean market to a "person" and gave an example.

"I think the Korean wine industry can be compared to a person in their thirties," he said. "They still have the potential to grow out of the greenness of their twenties. So I think the market will go through a little more hardship for 2 or 3 years and run toward a cool middle age."

And he picked up an important point.

"The current liquor tax system in Korea is quite unfavorable to wine," he explained. "In fact, the discussion on this has been going on for a very long time, but there is talk that the liquor tax system will change during this helm of State. Our country's state tax system now pays taxes on the basis of price. However, if this changes

Jae-Wan Chon

Sung-Ho Shin

to the form of paying a tax in proportion to the alcohol content, on average, the price of wine in Korea can drop by 20% right away. So I see it as possible for the market to double in 10 years from now. Korean wine culture has continued to grow steadily, and a country's industry cannot be evaluated by the number of large companies."

Yang Yoon-Yu is the youngest female champion in the 15th Korea Sommelier Competition in 2016 and is also the 'Sommelier of the Year' selected by the Korea Sommelier Association. She currently runs her own YouTube channel named after her, and is active as an ambassador for several brands, actively conducting her online and offline activities.

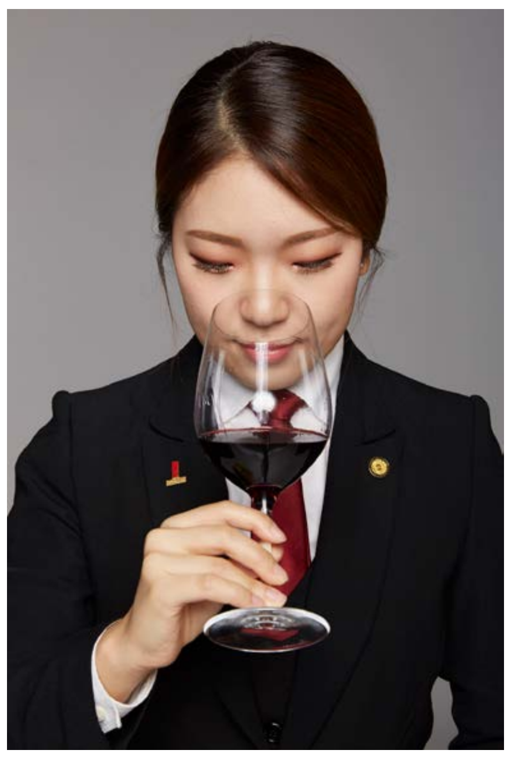
"I would like to say that the growth of the Korean wine market was not a bubble, but tangible growth," said Ms. Yoon-ju. "A large part of the growth is the expansion of the wine expert. In the past, the job of 'sommelier,' was mainly being in charge of wine lists and service at restaurants and bars. The job has now diversified. Even I have a lot of work that I can do with wine outside the store, such as YouTube, wine instructor, wine event host, interpreter, and ambassador. It is now easy to see fellow sommeliers working for large companies and managing wine shops across the country."

As she said, there are more opportunities for wine experts to appeal to wine as they meet more diverse consumers than before.

"In addition, changed consumption patterns, increased importers and portfolios, expansion of sales outlets and information, and most importantly, consumers' wine tastes prove that the Korean wine market is not a bubble," she maintained.

When asked about the sharp drop in operating profits of large companies, Ms. Ms. Yoon-ju replied that "In fact, at the beginning of the wine business, except for Lotte, large corporations did not do wine business. It was all about small importers selling directly to restaurants and hotels. However, there were signs that the wine market was growing, and Shinsegae L&B said they would enter the wine business quickly. We were also looking at the wine industry with concerns that if that happened, E-Mart or Shinsegae Department Store would also sell wine."

"Fortunately, the really good thing is that Shinsegae made wine popular by running the wine business," she said. "Sales during Covid were unexpected sales because people were confined to their homes because of the unexpected virus, and drinking wine rather than soju was a little more refreshing. I'm not seeing a drop in sales right now. I think consumers who get a taste of wine will have no choice but to keep looking for it. In the past, Korean consumers mainly wanted to look good and drink wine for health, but now, a new exploration of taste and the style I want to drink today are the main reasons for wine consumption. In the future, I believe that the growth of the Korean wine market will continue gradually without a new boom."


Yang Yoon-Ju


Hwi-Woong Jeong

Despite Changes, Fine Wines Still Sell

Hwi-Woong Jeong, who is considered by all Korean wine experts as the expert on wine data, noticed more long-lasting trends.

"There are several reasons for Korea's rapid growth, the first of which is the consumers' desire to purchase due to the Coronavirus pandemic," he said. "And the second is the rapid rise of wine as an alternative alcoholic beverage to soju/beer as the tendency to consume alcoholic beverages at home has strengthened. And there was an effect of dripping wine from the policy to boost domestic demand due to the virus."

He confidently said that past growth was not a bubble.

"First of all, it is true that consumption has shifted to other alcoholic beverages such as whiskey," Mr. Jeong said. "But changes in consumer tastes must be seen as inevitable. And the consumer class for fine wines remained."

"The size of the market has been maintained," he added. "There will be some decrease, but the market continues to move towards the high-end market in terms of amount rather than volume."

Mr. Jeong concluded that "Korea's import market is a mixture of many complex factors, but its value as a substantial and high-end market is clear. The high-volume strategy is gradually declining, and is shifting to high-end, popularization of the middle class and above, and lifestyle convenience mainstream in the future. The pattern of consumption on special occasions in the past has now changed to the pattern of consumption in everyday life."

"However, there will be difficulties due to market demand and importers' inventory problems, and the pattern is expected to show some of the shape of the 2008 financial crisis," he said. "We believe it will take about two years for the full recovery of the market to be felt. The time when the market will no longer deteriorate will be around the second half of 2023, and it will take about a year for the volume to be exhausted and stabilized, and the search period for new orders is expected to take six months, a total of two years."

A BROAD LOOK AT THE THEME

Sustainability, Social and Environmental Objective IN NORWAY

The Norwegian monopoly, Vinmonopolet, raises the bar and shows the way to the rest of the world. Focusing on a light and sustainable packaging, with tenders that reward the bag-in-box and the less heavy and reusable bottles. A particular attention is also devoted to human rights and labour protection, with a particular focus on the Italian supply chain. The World Wine Magazine discussed it with Sasha-Monique Elvik, Senior Sustainability Advisor at Vinmonopolet

By **HANS P. MONTGOMERY**

Sasha-Monique Elvik

In a wide-ranging perspective, the urgency of the moment aside, the greatest challenge to be faced by the wine sector is sustainability, in all its forms, but mainly environmental and social. It is a common goal to every production sector and to every country, starting from Norway, where expectations are particularly high. On the one hand, there is the ambition of the monopoly, the Vinmonopolet, which as a state company wants to be an example for the entire wine industry in building a responsible business. On the other hand, there are the expectations of customers who expect the maximum contribution from Vinmonopolet in making sustainable purchasing choices, "especially in terms of respect for human rights and workers' conditions, a theme that literally exploded during the Winter Olympics in China and the World Cup in Qatar," said **Sasha-Monique Elvik**, Senior Sustainability Advisor AS Vinmonopolet.

"In Norway, as in the rest of Scandinavia, high quality standards of the working environment and transparency have been fundamental issues over some time," Ms. Elvik said. "And consumers expect them to be respected also by the supply chains of the products they buy. It is our responsibility to guarantee this basic aspect, and to work so that quality and sustainability go together, proposing and advising the right wines, with the Vinmonopolet staff who are qualified and trained, even on Italian wines, which are thus enhanced in the best way."

To guide the purchases, in the Vinmonopolet stores there are three certifications, "with which the monopoly communicates the sustainability of its products," she said. "'Environmental Certified Production,' dedicated to wines certified by third parties (such as Equalitas and Viva), produced with attention to the environment and the protection of biodiversity; 'Certified Ethical production,' which certifies Fair Trade and Fair for Life productions, which indicate the effort made to ensure better working conditions; 'Climate smart packaging,' for packaging weighing less than 420 grams for a 0.75-liter bottle, defined as light packaging and therefore *climate smart*. When our team of product managers defines the guidelines of each tender, it must include at least one element of sustainability."

Vinmonopolet and Environmental Sustainability

"At the environmental level, the goal set by Vinmonopolet is that of a reduction in CO_2 emissions of 55% by 2030 (compared to the 2018 figure)," Ms. Elvik continued. "And the aspect on which it is particularly urgent, and incisive, to intervene is that of the production of containers, which represents 33% of the total emissions of the supply chain, against 19% attributable to production, 26% to agricultural work, 12% to sales, 6% at consumer level and just 4% to transport. The enormous variability of CO_2 produced by the different packaging is surprising: a really heavy glass bottle produces 1,300 grams of CO_2, compared to 675 grams for the standard bottle and 525 for the light one. Even lower is the impact of the PET bottle (245 grams, which fall to just 63 if inserted in the deposit cycle), the can (190 grams), the fibre cardboard (85 grams) and the bag-in-box (70 grams), whose plastic parts, such as the handle or the tap, to understand how important the details are, can only be recycled if white. We additionally focus a lot on *naked bottles*, bottles without unnecessary extra packaging, which we should eventually throw away anyway, because the bottles, on the shelves of Vinmonopolet, must all have the same possibility for sale. Having some bottles with extra packaging or decoration may encourage customers to buy them as for example gifts during Christmas, thus creating an unfair competitive advantage. In our stores, all products should have an equal chance for being purchased.

"There will never be a wine industry providing only wines in PET and cans, so we need to make the glass bottle better," she explained. "In the end, the most important aspect for the consumer at the time of purchase is the quality and taste of the wines. The content. Why not have a good wine in a lighter weight packaging that can be easily recycled?"

The Norwegian monopoly has decided to join forces with those of Sweden, Finland, Iceland and the Faroe Islands, with which it has signed the "Nordic Alcohol Monopolies Environmental Roadmap," which sets two common macro-objectives: to reduce the carbon footprint of the beverage sector by 50% by 2030, and to reduce the environmental impact in the value chain. It also wants to intervene with six direct actions on packaging, minimising the use of heavy glass bottles, increasing the share of packaging that guarantees a low carbon footprint, maximising the use of recycled materials, making all packaging recyclable, eliminating unnecessary packaging, and supporting innovative solutions with low carbon impact.

In the construction of Vinmonopolet tenders, these assumptions have led to a real escalation in terms of sustainability and packaging, with increasingly stringent requirements.

"From 2018 the Norwegian monopoly tenders require that for all still wines under 14 Euros per litre a light packaging is used," Ms. Elvik said. "While, from 2019, all aluminium cans and PET bottles have to meet the standards of the Norwegian deposit, recycling and reuse system. The majority of consumption concerns wines purchased and drunk within a year, often much less, and it is no coincidence that 50% of purchases concern wines in three-litre bag-in-boxes, also ideal for quality productions so much so that some reach prices above 55 Euros. Norway is a very practical country, and the monopoly always recommends the best solution to the needs of the consumer, regardless of stereotypes, such as those who want good wine marketed in a heavy bottle."

In 2020, lightweight packaging became mandatory for all wines launched at 14 Euros, and the more Environmental certified product tenders arrived on the market. 2021 is the year that marked the definitive acceleration, with three new requirements for tenders (50% recycled PET, recyclable bag-in-box inner bag and recyclable packaging) and as many innovations: "Environmental certified production" label, bare bottles and light bottles even in a higher price range. The goal, carried out in 2022, is to bring all new tenders to have at least one of these elements of environmental sustainability.

A final aspect that concerns the steps taken on the environmental sustainability front concerns "green washing" (vague, incorrect or undocumented statements, used to make consumers believe that their products are more ecological or sustainable than they actually are), a practice that companies sometimes abuse. For this reason, all "green" declarations must be documented, and currently only 16 national and international certification schemes are accepted. The label must be on the bottle and should clearly communicate which sustainability aspects of the product the certification applies to. Furthermore, precisely to avoid that sustainability is used as a marketing tool, wording such as "light bottle" (which can only be used by indicating the real weight of the bottle), "lower climate impact", "environmentally friendly" or "neutral/positive/measured climate impact" is not allowed by the Norwegian Consumer authority, while for example the percentage of recycled material used can be indicated. Vinmonopolet has also created a guideline for producers that is available on the Vinmonopolet website.

But is it possible, in such an articulated system aimed at excellence, to run into, if you can say so, a bottle of wine that does not comply with the sustainability requirements outlined by the Norwegian monopoly?
"We are working a lot on new products, but we certainly have no intention of leaving behind those we have worked with in recent years, which we must on the contrary make more sustainable," she said. "There are so many wines on the market in 1.2 kilogram bottles, a completely unnecessary weight. We must enter into dialogue with these producers so that their production processes change in the future. The goal is to make the entire supply chain more and more sustainable, and if Consortia and large companies begin to enter the order of ideas that is what the market wants, it will be easier to achieve it. At the moment, on the emissions front we are definitely behind, especially because after the lockdowns people thought more about celebrating the moments of normality than about the environmental impact of what they were drinking."

The Challenge of Social Sustainability

No less important, however, is the other cornerstone of sustainability, social sustainability, which essentially translates into respect for human rights and decent working conditions.
"The world of work is changing, with increasingly stringent laws that protect human rights and guarantee decent working conditions," Ms. Elvik explained. "Vinmonopolet, in its approach to due diligence of companies, follows OECD guidelines. The first part is to demonstrate that everyone who works in the supply chain of the wines we sell is treated fairly, according to fair working conditions and with the right wage. The second part is more complex and, through a circular approach in four steps, aims to identify critical issues along the supply chain, from the vineyard to the shelf, and to prevent and resolve them. This is something that the Scandinavian monopolies have been working on for ten years, but only now see that companies in our supply chains are realising its importance due to expecting laws, such as the CSRDD and Norwegian Transparency Act."
To prevent the exploitation of the most fragile labourers, "Vinmonopolet has promoted a series of initiatives, which also involves Equalitas in Italy," she said. "And above all the international network 'Stronger Together.' Protecting the most vulnerable people also protects the wine producer`s brand. The goal is not to boycott those who have labour exploitation problems, but to help them improve. Another project that we care a lot about, which we are also carrying out, is a survey among workers, very accurate, obviously anonymous, to understand what are the working conditions in the wine supply chain. We want to accompany the wine industry to the next level; we are at the beginning of an open path that producers have welcomed very well."
Another pillar on which the work of Vinmonopolet rests is the "Norwegian Transparency Act," which guarantees the protection of fundamental human rights and decent working conditions, which applies to 9,000 large companies, Norwegian and not. However, the main driver of the action of the Scandinavian monopolies is the Amfori Business Social Compliance Initiative (BSCI), which represents a global reference for monitoring and improving the social responsibility performance of companies. The principles of the BSCI Code of Conduct include the rights to freedom of association and collective bargaining, a fair wage, occupational safety and health, special protections for young workers, no forced labour, ethical behaviour by companies, no discrimination, decent working hours, no child labour, no precarious work and environmental protection.
Just as for environmental issues, also to improve the working conditions of the wine supply chain, Vinmonopolet works hand in hand with the other Scandinavian monopolies, and the main objectives are summarised in the "Human Rights Due Diligence roadmap": to guarantee the traceability of the supply chain in every step, up to the grower, by 2030; actively work towards more transparent supply chains by 2030; minimise the negative impacts of our industry by 2025; provide progressive improvement for each individual element of risk, and measure its effectiveness year after year. The Nordic alcohol monopolies pay particular attention to risks such as occupational health and safety, freedom of association and collective bargaining, discrimination, violence and harassment, forced labour and human trafficking, decent wages and working hours (and therefore a wage that guarantees an acceptable standard of living), access to remedy.

A/S VINMONOPOLET

HISTORY AND NUMBERS OF THE NORWEGIAN ALCOHOL'S MONOPOLY

Vinmonopolet, the Norwegian state monopoly, was founded in 1922, and its first task is to ensure the responsible sale of alcohol and limit the harmful effects of alcohol in Norwegian society. A key element of the country's alcohol policy is the elimination of private profit from the marketing of wine, spirits and beer, and the regulation of sales of any alcoholic beverage above 4.7 degrees. Today, Vinmonopolet has 344 stores scattered throughout the country, and employs 1236 people (35% men and 65% women), and works with 719 suppliers from 100 different countries in the world, from which it buys 34,406 different products. In 2022, it sold 97.3 million litres of wine, and 37.6% of the products sold had ecologically smart packaging.

Living Monuments Preserving the Memory of our Viticultural Civilisation


The historical Saccola vineyard in Contrada Pasquali in Crespadoro, near Vicenza

Distinct, centenarian vines dot the Italian viticultural landscape. Each possessing a unique ampelographic heritage and organoleptic profile, they represent a new commercial potential. We interviewed agronomist Professor Attilio Scienza, and included the legislative details around tapping into this potential as we uncovered the most prominent examples of grapevines on walls across Italy

The Unsuspected Benefits OF GRAPEVINES ON WALLS

HISTORICAL VINEYARDS. THE STATE OF THE ART OF THE ITALIAN LEGISLATION

The transition of the concept of old vineyards to historical vineyards has been legislatively codified in Italy for the first time in the Testo Unico del Vino (L.238/2016). Article 7 aims to protect and safeguard historic and heroic vineyards, emphasising that they "confer unique characteristics to the product." The first two paragraphs of Article 7 state the following:

1. The State promotes actions to restore, recover, maintain and safeguard vineyards in areas subject to hydrogeological instability or having particular landscape, historical and environmental value, hereinafter referred to as "heroic or historic vineyards".

2. The vineyards referred to in paragraph 1 are located in areas suited for the cultivation of vines where specific environmental and climatic conditions give the product unique characteristics that are closely linked to their territory of origin.

Currently, the goal is to invite individual regions to identify potential territories and producers, to define management and financing methods, as well as priorities associated with various programmes for the wine-growing sector. Increasing awareness of these vineyards, which are often found in particularly extreme geographical locations, is key.

Text by **ALDO LORENZONI** *and* **LUIGINO BERTOLAZZI**

Photos by **GIANMARCO GUARISE**

The concept of old vine is currently drawing the attention of both producers and consumers in different markets around the world, and, in some countries including Italy, even that of legislators. Those small historical vineyards, scattered throughout the entire Italian territory, are often made up of vines over a century old, embodying our viticultural identity. These unique micro-vineyards, which could be defined as "wall vines," not only reflect a given territory but can also offer surprisingly original wines.

Context and Success of Old Wines as a Category

The perception wineries and consumers have of old vines and their historical production and unique settings, has been evolving. Old vines, often referred to as micro-vineyards of a certain age, remain strategic treasure chests of genetic biodiversity that can prove useful when facing climate change and health challenges.

The life cycle of European vineyards was significantly impacted by the advent of phylloxera. While grafting methods managed to solve the problem of plant survival, it also forced plants to live under stressful conditions that limited their historical natural resistance to diseases and drought.

Though pre-phylloxera vines could easily live for a few hundred years, today – mainly due to commercial reasons– the average age of vineyards has fallen considerably, resulting in an oversimplified ampelographic heritage. In this context, the value of old vines, grafted or not, can provide a whole new range of possibilities.

Communicators and institutions alike are paying more attention, pushed by increasingly demanding and knowledgeable consumers. Nearly every wine-producing country now has organisations and associations devoted to the enhancement of old vines. Master of wine **Sarah Abbott**, together with colleagues like Italian journalist Michel Shah, founded the Old Vine Conference (www.oldvines.org).

"The main objective of this initiative is to enhance the value of these vineyards through the creation of a network of companies that can act as custodians of this historical viticultural heritage," Ms. Abbott explained. "The Old Vine Conference brings together a strong community of professionals that would like to see wines produced from old vines recognised as a new commercial category, sharing agricultural practices and strategic visions of promotion."

This vision is already being promoted with projects like the valorisation of Schiava's Gschleier Alte Reben (Old Vineyards) vineyard in Alto Adige, managed by Girlan Winery, and by the insertion of this specific commercial category in the prestigious wine distributor Proposta Vini's 2023 catalogue.

"Alongside other evocative categories, such as Volcano Wines, Extreme Wines and Angel Wines, since 1999, we have also included wines made from 100-year-old vines featuring labels from Trentino, Veneto, Lazio, Campania and Sicily," said **Gianpaolo Girardi**, founder of Proposta Vini. These are wines that can safely be described as more intriguing, both in terms of smell and taste."

A SCIENTIFIC LOOK

Why Are “Wall Vines” so Important?

Attilio Scienza (left) and Marino Anselmi (right)

With the help of Attilio Scienza, we explored how “wall vines” and their characteristics have survived until today and how to ensure their preservation

We will be showcasing a selection of 100-year-old, single vineyards often clinging to old houses or historic walls, as the symbol of our in-depth study. These are living monuments showcasing the oenological history of their territory and representing the respect and care with which winegrowers have been tending to these plants over the decades. These “wall vines” are often considered unique not only for their specific size, positioning and the way they tie in with their supporting buildings, but mainly because of their rarity and the distinctiveness of their genetic pool. While considered uneconomical from a purely commercial standpoint because of their very limited production, these vines nonetheless carry a cultural and human know-how that deserves to be preserved. We asked Professor **Attilio Scienza** to help us understand the real value of “wall vines.”

Professor Scienza, how did these unique plants manage to survive adversities and pathogens such as the devastation of phylloxera over the course of history, practically unscathed? Why are these vines usually found clinging to, almost nested in, a wall if not inside the wall itself?

The “wall vines” or courtyard vines are a legacy from a time when men used to move frequently over the year to work away from home, sometimes even in distant places. They were artisans, bricklayers, butchers, woodcutters, but they were not winegrowers. When they returned home, they took with them vine shoots from the places they visited for work and planted them, free-standing, very often near the front door, to make a *topia*, a small pergola. They were often table grapes, as happened with the Magdeleine de Charentes, an early variety that ripens around St. Magdalena, on July 22.

Another way was to raise vines brought from other places along the courtyard walls, not only to eat the grapes but also to make a distillate from them. This was the case with *rakija*, produced by the Albanian communities in the south of the country, who went seasonally to work in Greece. This is probably how the first vineyards made by the Greeks in southern Italy came to be, protecting the plants, brought from their places of origin, within vineyards enclosed by walls, as Homer also describes them in the *Iliad*.

If, in the areas of first domestication, viticulture went from its so-called embryonic forms of the late Neolithic age to the first arboreal vineyards, the vines that arrived from the east were first established along the walls of the houses of our early communities. In Trentino, until the arrival of phylloxera, viticulture was practised in an uninhibited form. Vines were grown only along the walls of the cesure, small plots cultivated with cereals or vegetables, protected by stone walls. Even now, in the Rotaliana plain and around Rovereto, it is not uncommon to find old, free-standing vines of Teroldego or Marzemino. Among the tree species, the vine is the one with the greatest longevity. It is precisely because of this characteristic that there are numerous examples of vine plants of remarkable age and of equally unusual size (if one thinks of the vine as a liana plant) in its multi-millennial history. History provides us with some evidence of artefacts made from the wood of vine trunks, such as the statue of Jupiter in Populonia or the columns of the temple of Juno in Metapontum, or the doors of the cathedral in Ravenna and St Sophia in Constantinople.

More recently, there is a vine around 350 years old in Pombia in the Novara area with a stem circumference of 1.45 metres, or a stump of an ancient South Tyrolean variety leaning against a house in Magreid that dates back to 1600. Normally, plants that reach a considerable age and size are isolated, cultivated in cloisters, courtyards or along avenues that enjoy special care and conditions. There are some significant cases of old vines cultivated in vineyards such as that of Clos de Vougeot in Burgundy.

Below, a detail from the Stara-Trta, an ancient vineyard in Maribor, Slovenia

Why do older vines produce better wine?

Quite simply because grape production is self-regulated, finding a balance with the foliage that has to feed it. The relationship between the aerial canopy and the root system benefits the latter, even if, due to the difficulties of sap circulation in the plant, they end up building up reserves rather than encouraging vegetative development. This results in low fruit production and a high availability of reserve substances during ripening.

After the great transformation of Italian agriculture around the 1960s and the disappearance of sharecropping, most of the traditional forms of cultivation (trees, *testucchi*, pergolas, etc.) rebuilt after the advent of phylloxera were replaced by mechanized and specialised forms of row cultivation. Subsequent renewals over the last 10 to 15 years, especially varietal renewals, have resulted in disappearance of many older vineyards.

In Italy, however, there is still a little-known wine-growing heritage represented by historic vineyards, over 50 to 60 years-old, often located in picturesque or important cultural landscapes.

Every wine-growing area has some vineyards with these characteristics: from Alto Adige, Piedmont and Tuscany to Apulia and Sardinia. However, older vines are more present in the southern regions, not only because they are less affected by the pressures of vineyard renewal, but because local pruning techniques preserve them from contracting serious wood diseases (*esca* and *eutipiosis*)—the real enemies of today’s vineyards.

Of course, there are other elements that allow southern vineyards to survive longer. This includes the lower rate of intensive production to which vineyards in northern areas are often subjected (with excessive fertilisation, irrigation, higher bud loads) as well as a lower risk of hailstorms and frost damage. But even in these regions, modernisation of vineyards is pressing. Old head-trained bush vines that cannot sustain machining methods and varieties that are not very productive are slowly being replaced.

Elderly winegrowers, the only ones now defending older vineyards, are retiring. In marginal areas rich in ancient viticultural heritage, viticulture is no longer a sufficiently profitable economic activity. Awareness about the protection of biodiversity is growing—in recent years it has aroused much interest among consumers and media—but has unfortunately only affected the varieties of so-called autochthonous vines.

Yet even the most traditional places practicing vine cultivation, old forms of cultivation and older vineyards are subject to erosion and must be protected.

How important is it to safeguard the integrity and vitality of old vineyards?

Very important, not only for the quality of the wines they produce or for their landscape and cultural interest, but because they represent an important reserve of genes that can be used to create improved vine plants which are more virus tolerant. In fact, these plants have survived longer than others because, in addition to having benefited from special climate and soil conditions, they have developed forms of resistance to certain viruses and wood diseases. In addition, their genetic memory, tied to the transmission of the epigenetic code, contains a mechanism that regulates genetic activity without changing DNA sequences over generations, allowing the expression of genes in a natural manner, except for mutation events that normally alter the behaviour of plants, both positively and negatively.

These plants, which are certainly not very profitable from an economic point of view, contain numerous minor varieties, otherwise destined to disappear, and a very high genetic variability, which represents a great asset for future generations of clone breeders.

How can we prevent losing the last traces of ancient Italian viticulture?

First of all, we need a census of all these vineyards with a detailed map documented by numerous photographs. We need to convince the owners and vine-growers to maintain at least part of these vineyards to avoid the progressive loss of plants, to intervene with appropriate dendro-chirurgical techniques when necessary and to renew the productive structure with appropriate but non-invasive pruning. We must offer visibility via media, allowing the vine-growers to talk about their wines, tell their stories and showcase their vineyards.

Using DNA surveys to study the genetics of these vines can unlock the secrets to their longevity. A concrete example of protection and preservation can be found in Maribor, Slovenia, where the Stara-Trta (Old Vine) has lived on the right bank of the Drava River for hundreds of years. It is perhaps the longest-living Vitis Vinifera Sativa, or perhaps the most famous in the world, as it was included in the Guinness World Book of Records in 2004. Here, the plant’s age was determined by scientific tests and validated by a painting dated between 1657 and 1681, where it is depicted clinging to the wall of the house where we still find it today. It is a variety of red berry grape called Modra Kavcina that produces around 80 kg of grapes each year, and whose wine is promoted by the mayor of Maribor during official events.

A JOURNEY
INTO FIVE OF ITALY'S CENTENARIAN VINES

Robert Cassar and the Queen of Margreid

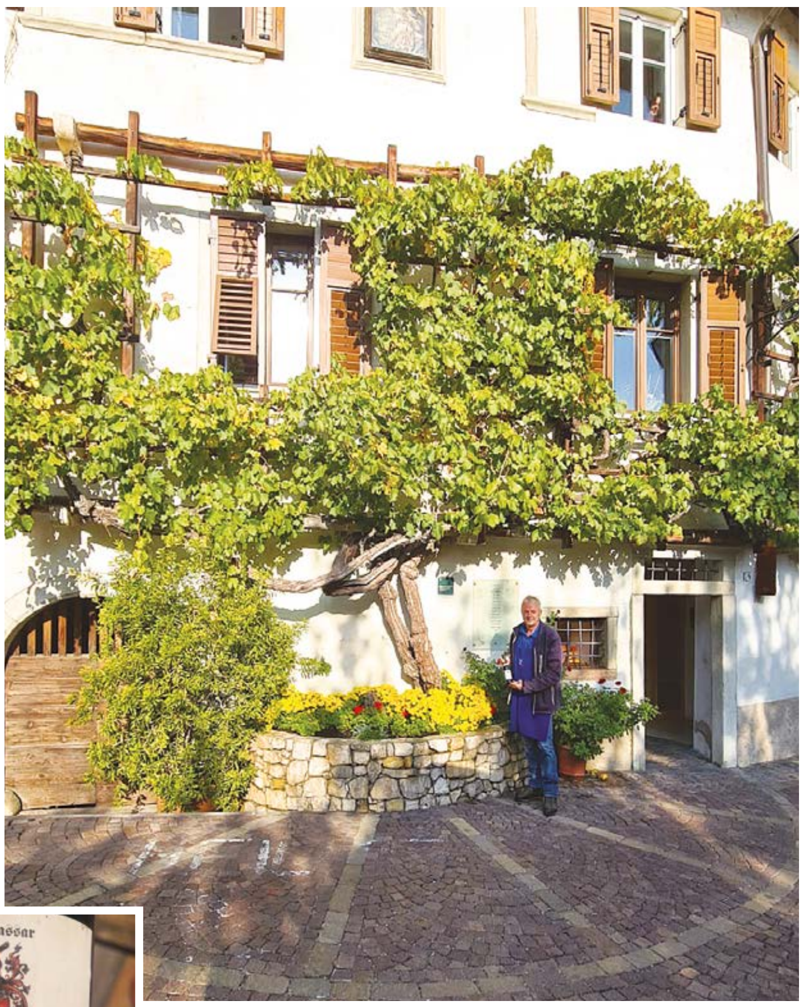
This monumental vine clings to an articulated trellis across the façade of Robert Cassar's house in the square in Margreid, a few kilometres south of Tramin, South Tyrol. It is listed and protected by the Province of Bolzano as a Natural Monument (Naturdenkmal); its historical value is certified. An inscription engraved on one of the stone supports that have always bound it to the wall of the house reads: "In the year of grace 1601, in October, this vine shoot of the ancient Feichter vine stock owned by Clement Feichter was planted, through the tenant farmer Domenig di Valentini from Val di Sole." The province's plaque also emphasizes that the old Margreid vine, which has produced its grapes for a dozen generations, and has been growing and developing for no less than four centuries, is a true symbol of the continuous renewal of life and fertility.

Only recently, thanks to the collaboration of Crea in Conegliano, has the genetic identity of this extraordinary vine been confirmed through DNA analysis. It is in fact the Hoertroete, also known by the synonym Roter Hoertling, a rare variety listed in the European register of vine varieties (www.eu-vitis.de). Very little information exists about this variety except that it has a medium vegetative cycle, has full leaves with an open petiolar sinus, the bunch is medium-sized and rather compact, characterised by a light red colour. It is a sugary variety, with spheroidal berry and crisp flesh, carrying fruity notes of plum and prune. It is most probably a dual-purpose grape, used for both wine and table consumption, as was once the case with Dorona in the Veneto.

While the plant is protected by the province of Bolzano, only the caretaker and owner Robert Cassar has ensured that it is still in excellent condition today. Robert knows that Roter Hoertling is inextricably linked with his family, who had started a flourishing business with vine cultivation and wine production. He tells us that when his daughter Lisa was born in 1997, he planted a second Hoertroete vine made from the wood of the mother vine. The vine, which is now already 25 years-old, covers the whole of the little bridge near the picturesque fountain in front of his house. Robert, a vine-grower, delivers his own grapes to the Nals-Margreid cooperative, for which he is a councillor. He only vinified grapes from his old vineyard (Urrebe) once in 1989, which he bottled under the name Vinum Getrudis Margredum. Thirty years later, the wine has turned out amazingly (see box opposite).

The grapes of this great vine had not been vinified since, but were often given as a gift or consumed within the family. After this extraordinary tasting, and thanks to the interest of Giacomino Fasano, an entrepreneur from Racconigi who often stays in Termeno, Robert got to experience the thrill of winemaking again. The new wine, a 2022 vintage, is already living up to the Gertrudis Magredum name. Time will work its magic, delivering a wine that tells more than 400 years of history.

▾ Robert Cassar with its Hoertroete, the queen of Margreid, near Bozen

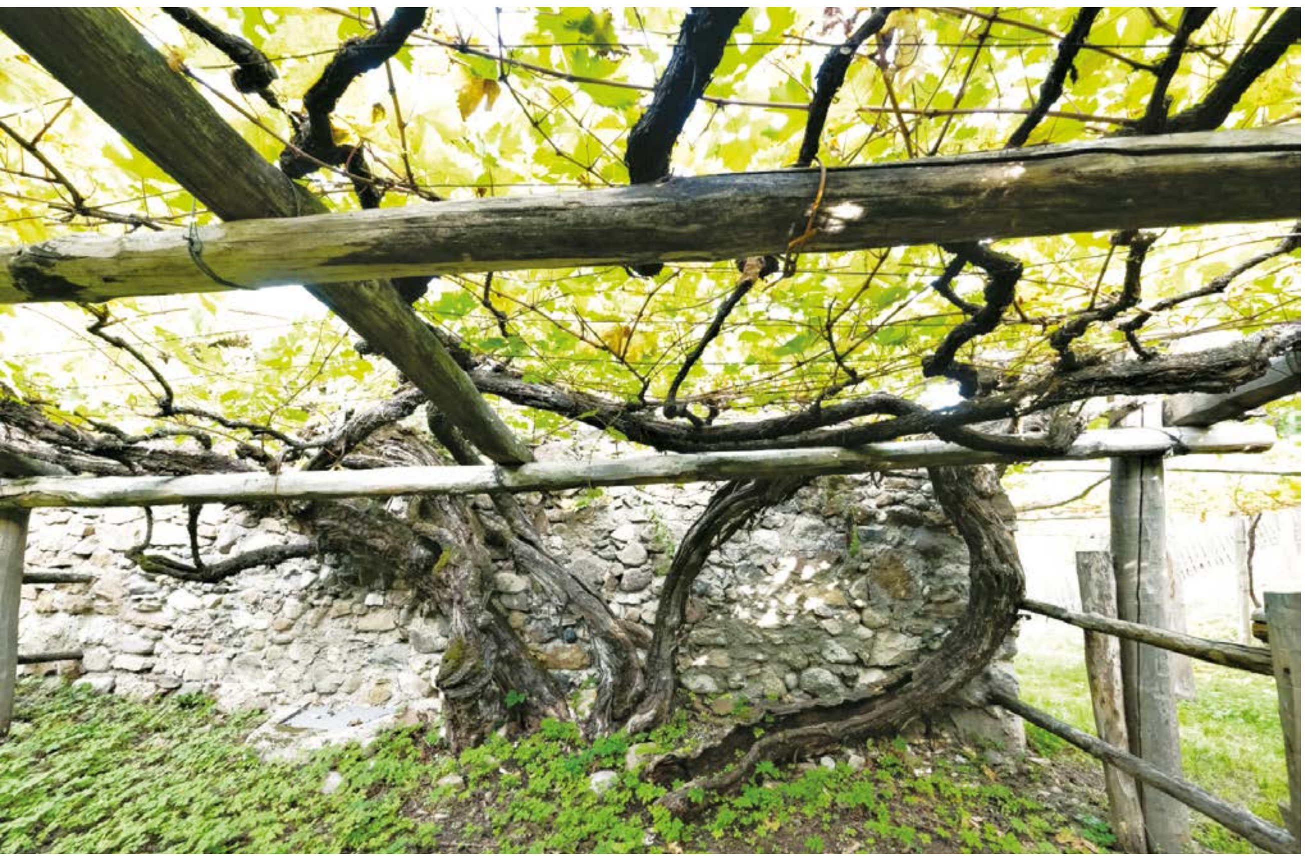


Egon Perathoner Taste-Tests the 1989 Vinum Getrudis Margredum

To be objective in our appreciation of the Vinum Getrudis Margredum's 1989 vintage, from a Roter Hoertling plant more than 400 years-old, we asked Egon Perathoner, one of South Tyrol's most accomplished sommeliers, to help us with the tasting. Egon has experience working in many important restaurants across the peninsula. Since 2008, he has been the cellar manager of the starred restaurant Anna Stuben in Ortisei, where he is currently maitre d'hôtel as well.

"During my long career I have never had the opportunity to taste a Hoertroete, so I am very curious, especially considering the importance of the vintage," he admitted. There was a range of sensorial experiences when opening the bottle.

"Pouring the wine into the glass, I was surprised by its clarity and cleanliness," he added. "Extraordinary orange hues revealed an important wine. I immediately fell in love with the nose, which reminded me of some great Schiava or Pinot Noir. Even if the scents were a little evolved, expressing overall positive aromas of undergrowth and mushroom, they were nonetheless very pleasant for a 33-year-old wine. It was also very good on the palate, with slightly sweet notes reminiscent of plum jam. Perhaps a little short, but very elegant. I could almost define the finish as modern, with perfect acidity and tannins. I was thrilled."



◂ The monumental vineyard of Versoalen in Prissiano, near Bozen

Josef Terleth and the Old Versoalen Vine

When speaking of living monuments, one cannot ignore the over 300-year-old vine at Katzenzungen Castle in Tesimo-Prissiano. At an altitude of over 600 metres, surrounded by forests, chestnut groves, orchards as well as castles, ancient churches and old farmsteads, this is one of the most impressive panoramic terraces in South Tyrol. **Josef Terleth**, a dynamic and knowledgeable researcher at the Laimburg Experimentation Centre, unveils the history and secrets of this vineyard and its castle.

"The castle is from circa 1200," Mr. Terleth said. "It belonged to the family of Henricus de Katzenzunge and was then passed on from hand to hand among the most important families of the province. In 1978, it was bought by the Pobitzer family, who restored it. Today it is one of the most evocative locations for public and private events. The Versoalen vineyard is located just below the castle in an area that would appear to be less than favourable for vine cultivation. Yet these vines are more than 300 years-old, as scientifically proven in 2004. They thrive in the area, which is characterised by a poor porphyritic soil mixed with important accumulations of alluvial material, almost burying the vines. The vineyard is protected as a natural monument by the Province of Bolzano and was initially cared for by the Merano Botanical Gardens, part of our experimental centre. Today all vine management is by us at Laimburg. We have appointed a local winegrower for all cultivation operations, which are carried out strictly biodynamically. The grape harvest and vinification are carried out directly by the Laimburg winery, which is also responsible for selling the bottles."

"I believe that the longevity of this plant, whose pergola extends over more than 300 square metres, also depends a great deal on the ancient wall," he said. "This vineyard is very well cared for; the entire pergola structure was recently rebuilt with resistant wood. The production is constantly protected from birds with mobile nets. Around the mother plant, other plants of the same variety have been planted in successive years, resulting in a small, very attractive vineyard. This year we harvested a total of almost two quintals (200 kg) of grapes. Initially, it was thought that the variety was Gouais Blanc, but DNA analysis later clarified it was Versoalen. This variety, much cultivated in the last century, has almost disappeared. In fact, only a few historical strains remain throughout the province, such as the one at Maso Unterweirachhhof. The name Versoalen may refer to *faxoal* or *frason* (i.e. small parallel strips of land) but also to *versoaln*, a word that in dialect means to tie with ropes, which may refer to the steep places of production, where there was a need to secure the product with ropes for transport. This variety sprouts early but ripens slightly late. Moreover, the production is inconsistent because it is prompt to millerandage, though it is resistant to powdery and downy mildew. In 2018, the Laimburg Experimentation Centre added the Versoalen to the National Vine Variety Register. The protection and preservation of ancient genetic heritage initiatives the centre developed also include other ancient varieties in the province, such as Blatterle, Fraueler, Weissterlaner and Furner."

We had the opportunity to do a small vertical tasting of the 2017, 2018 and 2019 vintages of the still version, and a 2018 sparkling traditional method version. The vine appeared to produce very versatile wines that can be slightly aromatic if left to ripen well, or more austere with a distinct sapid-acidic structure if harvested a few days before technical maturity. These wines nonetheless deserve to come out from their isolation in which they were preserved.

An ancient Pontedara vine in Comerlati di Badia Calavena, near Verona ▸

The 100-year-old Pontedara Twins in the Contrada dei Bovi

The Pontedara is a special vine that produces better quality wine than other varieties grown in Lessinia, but this variety is still unknown to the international DNA register. The impressive size and age of the two splendid "wall vine" specimens found in contrada Bovi (municipality of Badia Calavena in the upper Lessinia of Verona) belong to Silvano and Pietro Bovi. It has not always gone smoothly for the vines in this contrada located at an altitude of 600 metres. The owners explain that in the 1970s and 1980s the cold and rain affected the productivity of the mountain varieties, which threatened their survival. Now, blessed by the sun, lush vines are showing beautiful ripe fruit.

In these areas, Saccola was the everyday wine, while Pontedara provided the wine for feasts, weddings and other milestone moments in life. As the story goes, during the second half of the 1800s, Cristiano Bovi met his wife-to-be Angela Carpene in contrada Comerlati in Santa Trinità di Velo, where he first tasted her father's wine made from this variety. Impressed by the quality, Cristiano decides that Pontedara must also be the Bovi's wine and he happily planted some cuttings from his father-in-law. From the cuttings planted around 1870-1880, a vine developed from which wood was taken to propagate at the front of houses all over the Bovi district. For about 140 years, this vine has been providing wine to the Bovi family and neighbours. After Cristiano, his son Davide planted another one next to the front door of the family home. Today the imposing structure of the two sister vines make a fine show. Both have developed over the years on the small land surrounded by rock in which they were planted. They remain preserved by the rock. Davide's sons, Silvano and Pietro, together with all the heirs of the Bovi family, have continued to care for this vine, which they consider almost a family relic, a sign of the passing of time transcending generations. In the 1950s and 1960s, the districts became progressively depopulated due to lack of work. As people moved, some to factories in Lombardy and others to the plains, the area emptied and now remains the place where the family, during the summer period, rediscovers its roots. Together they unite in the shade of the vines planted by their great-grandfather Cristiano, silent witnesses to a solid farming culture.

▴ An historical Dorona vine in Arquà Petrarca, near Padua

Giuseppe Falamischia's centenarian Dorona vineyard in Begosso, near Verona ▸

Vittorio Falamischia and the Walled Resurrected Dorona

Dorona is undoubtedly one of the most iconic vines of the Veneto region; its full name is *Dorona di Venezia*. But to speak competently and knowledgeably about this vine, one needs to be very knowledgeable and also a bit brave. It is a variety that, like Venice itself, is more famous than known. However, curiosity, interest and perhaps luck could not keep us away from this grape variety, which in recent years has become iconic in Veneto's rich ampelographic portfolio. One can easily find information about this grape on the web or in books, but one needs to dig deeper. The official register of the ministry reports that, under different names, Dorona was already cultivated in the 1800s somewhat throughout the Veneto region. Recently, it has only been found on the Euganean Hills in the province of Padua, in specific plots in the province of Verona and on some islands in the Venetian lagoon. Venice, Padua, Vicenza and Verona are therefore the original areas for this variety, which in the past was often confused and assimilated with other varieties. This also mistakenly happened to us when we came across the large walled vine in Vittorio Falamischia's house in Begosso di Terrazzo in the Basso Veronese.

He told us the story of this vineyard.

"I know for a fact, that the vineyard is 130 years old because it was planted by Marietta Girolo, who was my wife Luciana Castiglioni's great-grandmother, on her return from America, where she had emigrated as a child with her family around 1870," he said. "The 20th century had not yet begun when they returned and, until 1964, she tended the plant near the house. My father-in-law Alberino Castiglioni made wine from this plant, but they also ate the grapes. In 1986, we decided to extend the house in the direction of the porch where the vine was located. We didn't have the courage to uproot it, so we basically walled it off, leaving the foliage to grow out of the first floor. A forced pruning a few years later seemed to have compromised it, but after a while we saw some new shoots. Since then the vine hasn't missed a season, regularly producing large bunches. We didn't know what variety it was until DNA analysis revealed that the walled vine was in fact Dorona. The 2022 vintage produced about 35 litres of wine, which is looking very promising."

The Archaic Vineyard of Marino and Dario Anselmi

The Veronese wine-growing panorama is certainly unique both for its location at over 700 metres above sea level, in the Sprea di Badia locality in upper Lessinia, and for the richness of its vine biodiversity. We are talking about approximately 5,000 square metres of vineyard with a slope that reaches 35%, trained to the traditional Trentino pergola system but without the use of iron wires and with a planting pattern of 3.5 × 1. The soils are substantially calcareous; the vineyard is certainly more than 100 years-old. Many of the vines are free-standing, and the most widespread variety is a vine that is called Saccola in the area, though DNA analysis has revealed it to be Pavana. It is a red grape variety of good vigour with a semi-erect vegetation habit and good production. Its characteristic is that it has very high acidity with good evidence of malic acid, which makes it interesting at a time of great climatic change for its many oenological uses. Dario Anselmi explains that the wines here are characterised by a very intense colour, a very pronounced acidity, average sugar levels and that the wine must age for a few years before expressing its best potential.

What characterises this iconic site, however, are a few hundred-year-old vines leaning against the walls of the houses, stables and barns. Some of these archaic vines have only revealed their obscure identity through DNA analysis. They are Gouais Blanc, or Liseiret, a white grape variety thought to have disappeared in this area. A forgotten variety from a cultivation point of view, but which in the past played a fundamental genetic role in the development of the central European varietal assortment. In fact, it is the parent of some 80 grape varieties that are cultivated today, including some well-known international varieties such as Chardonnay and Gamay in combination with Pinot. It is therefore a very old vine, with well-defined characteristics and perhaps even dating back to the Middle Ages.

Gouais is characterised by its high fertility, robust resistance to low temperatures, its fair amount of sugar and its high acidity that predisposes it to optimal sparkling. The wine therefore has a consistent and structured acid thorn, the aromatic reference is to green apple, the aftertaste and taste are fresh and, unlike the Chardonnay, do not impose a certain and defined line but leave room for the evolution of a fine sharpness and a clean but extremely intriguing personality. It is now a question, as in other similar cases, of verifying the evolution of these characteristics over time.

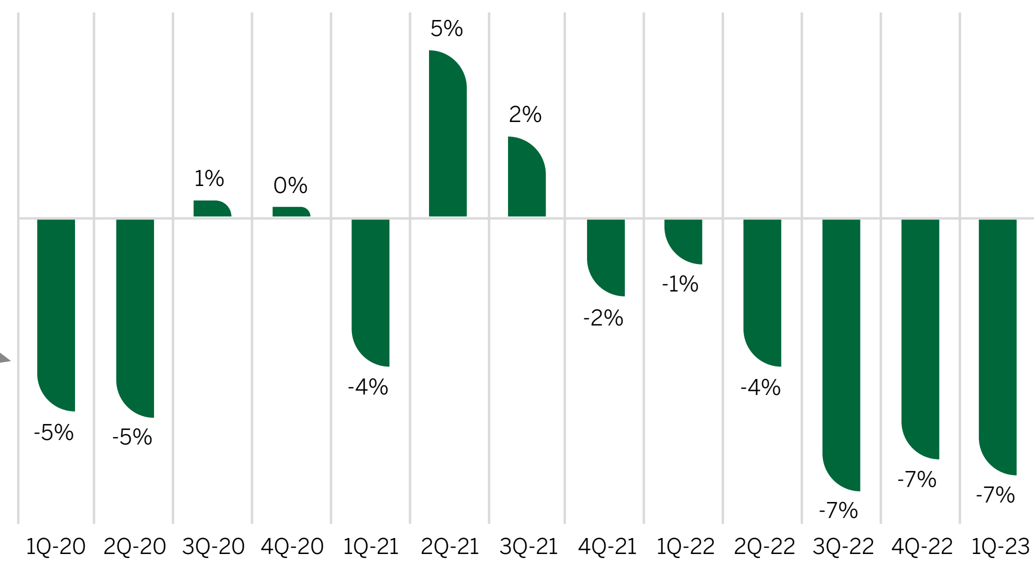
Above, an old Saccola vineyard in Sprea
Left, a centenarian Liseiret (Gouais Blanc) vineyard in Alta Lessinia and a detail of a Liseiret (Gouais Blanc) wall vine in Sprea, near Verona

WORLD WINE IMPORTS IN Q1, 2023

Still DECREASING

The trend is worsening for packaged still wines (-7%), while sparkling wines are down 5%. China is still in sharp decline (-40%), the US is stable, and the UK and Canada are dipping into double-digits

BOTTLED STILL WINES: % CHG. VOLUME BY QUARTER



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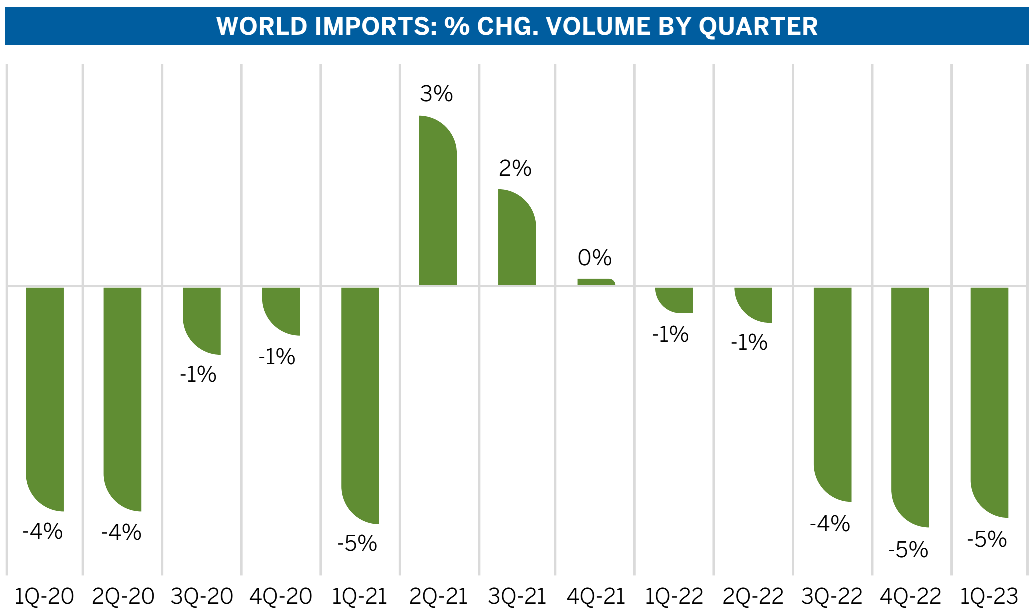
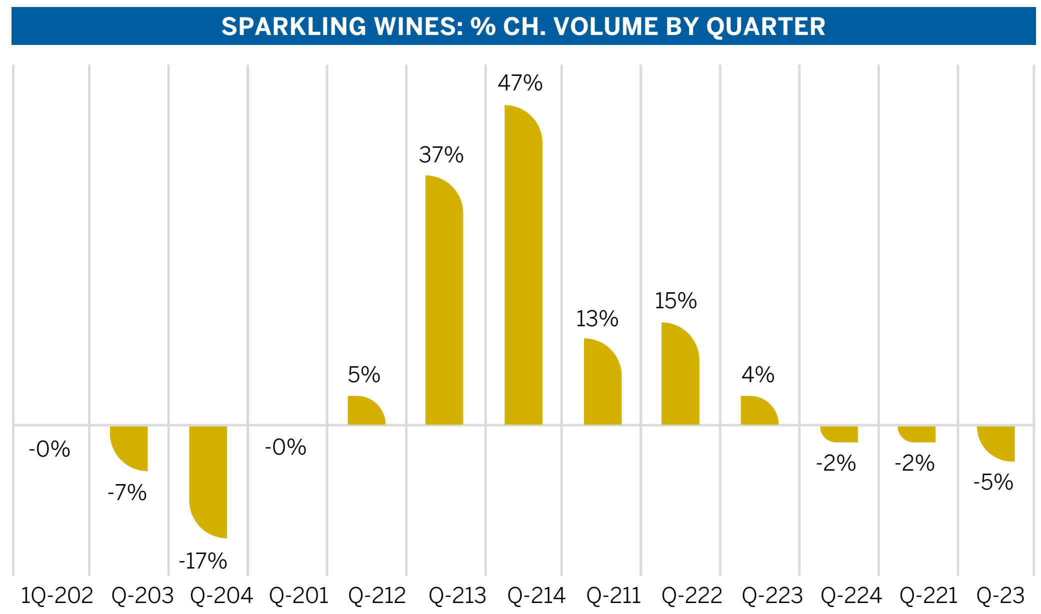


SPARKLING WINES: % CH. VOLUME BY QUARTER



WINE OBSERVATORY

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

Wine imports for the first quarter of the year globally decreased. According to analyses from the UIV-Vinitaly Wine Observatory, the business barometer grouping the main countries (excluding Russia, which has blacked out customs data since February 2022) indicates a 5% drop on volumes and a 2% drop in terms of value. January through March showed a third consecutive quarter below zero for values and the fourth for volumes, which have been progressively deflating since the second quarter of 2021.

The worst dynamics in volumetric terms were recorded for packaged still wines, which closed the quarter at -7%, while below-cost sales made by some countries stuck with out-of-control inventories, weighed down on values, penalizing the bulk sector, down 9%, with average prices reduced by 8%.

Sparkling wine also closes the three-month period negatively both in volumes (-5%) and in values (-2%), facing an inflationary price dynamic (+9%) that is not helping. This is the third consecutive declining quarter for sparkling wines; March ended up even weaker than December and September 2022.

For still wines, the -7% decrease in March comes after identical declines already noticeable in the previous two quarters, although the initial trend started at the tail end of 2021.

Still Wines By Major Countries

In Germany, on the still wine side, Italy closes the quarter positively regarding volume (+4%), but loses ground in terms of value, mainly due to a 6% reduction in average prices. This is in contrast with its two main competitors, France and Spain, which kept last year's prices unchanged and put a plus sign on the value component as well.

In the UK, faced with overall rising values worsened by the weakness of the pound, importers are facing higher purchase prices. The total market fell 12% for volume, with Italy at -7% and France at -20%. Spain is bucking the trend. On the premium side, New Zealand experiences +15%, while wine imports from Belgium, a trading and customs clearance hub for many suppliers, including Italians, continue.

The general trend for Italian wines seems to be steadily and progressively decreasing according to the curve by quarters, stagnating at the 30-million-litre threshold against a 40-50 pre and post-Covid average.

In the U.S., Italy is the only main supplying country confronted with stalling volumes, standing still at last year's levels, while France and New Zealand grow (+8%) and (+40% volume and value) respectively. Perplexity remains for the *Bel Paese*, which experienced a small increase in value (+5%) compared to France's impressive results +23% and +14% average prices.

The curve by quarters indicates a return to pre-pandemic values, following a 2022 already showing decreasing momentum compared to promising results throughout 2021.

In the Canadian market, the important negative trend for Italian wines is in stark contrast to a first quarter 2022 that had surfed on

WORLD TRADE: First semester

SPARKLING W.

	,000 Litres			,000 US$			US$/litre		
	2022	2023	% Chg.	2022	2023	% Chg.	2022	2023	% Chg.
USA	39,062	40,068	2.6	368,119	411,515	11.8	9.42	10.27	9.0
UK	34,704	28,132	-18.9	268,456	234,967	-12.5	7.74	8.35	8.0
Japan	8,570	8,319	-2.9	160,603	174,226	8.5	18.74	20.94	11.8
Germany	14,743	14,669	-0.5	112,693	120,230	6.7	7.64	8.20	7.2
Switzerland	4,280	4,499	5.1	50,522	57,784	14.4	11.81	12.84	8.8
Canada	4,369	3,743	-14.3	42,551	35,480	-16.6	9.74	9.48	-2.7
France	7,186	7,992	11.2	27,617	34,127	23.6	3.84	4.27	11.1
South Korea	1,888	1,904	0.9	20,935	24,828	18.6	11.09	13.04	17.6
Hong Kong	796	620	-22.1	16,114	16,734	3.9	20.24	26.99	33.4
China	1,809	1,056	-41.6	22,446	15,101	-32.7	12.41	14.31	15.3
Brazil	1,114	1,393	25.0	5,636	8,228	46.0	5.06	5.91	16.8
Total	118,521	112,393	-5.2	1,095,691	1,133,220	3.4	9.24	10.08	9.1

BOTTLED W.

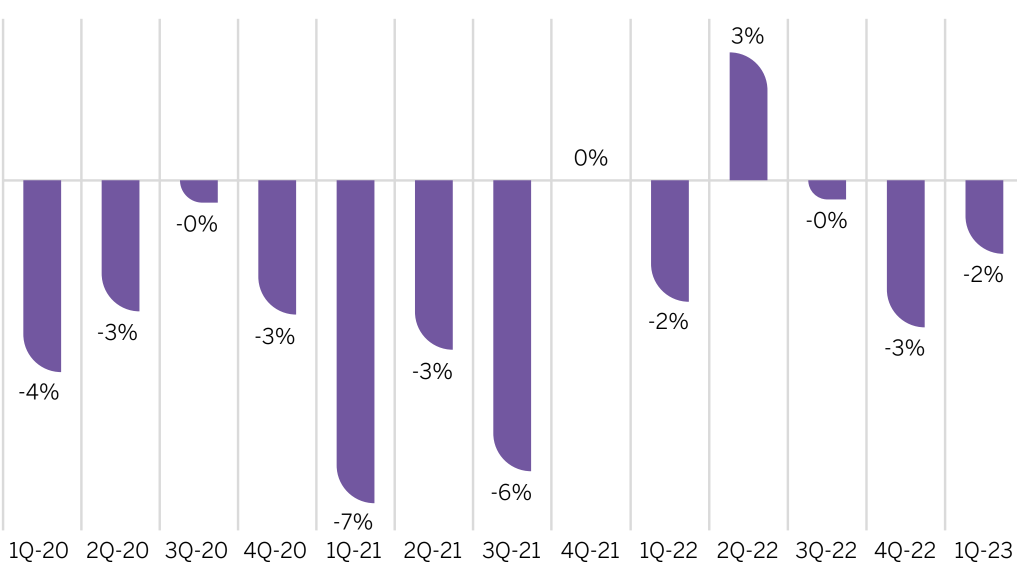
	,000 Litres			,000 US$			US$/litre		
	2022	2023	% Chg.	2022	2023	% Chg.	2022	2023	% Chg.
USA	157,108	161,603	2.9	1,023,907	1,140,630	11.4	6.52	7.06	8.3
UK	140,693	124,444	-11.5	729,768	666,067	-8.7	5.19	5.35	3.2
Germany	110,943	115,748	4.3	429,115	423,335	-1.3	3.87	3.66	-5.4
Canada	64,669	53,451	-17.3	435,252	360,548	-17.2	6.73	6.75	0.2
Switzerland	24,280	24,170	-0.5	267,960	260,838	-2.7	11.04	10.79	-2.2
China	54,565	33,133	-39.3	293,962	237,477	-19.2	5.39	7.17	33.0
Japan	36,806	35,925	-2.4	229,918	235,300	2.3	6.25	6.55	4.9
Hong Kong	7,943	6,525	-17.9	220,947	231,247	4.7	27.82	35.44	27.4
France	22,884	24,256	6.0	112,239	124,849	11.2	4.90	5.15	4.9
South Korea	14,350	11,564	-19.4	115,405	107,060	-7.2	8.04	9.26	15.1
Brazil	29,849	26,692	-10.6	89,289	86,914	-2.7	2.99	3.26	8.9
Total	664,090	617,510	-7.0	3,947,762	3,874,265	-1.9	5.94	6.27	5.5

BULK W.

	,000 Litres			,000 US$			US$/litre		
	2022	2023	% Chg.	2022	2023	% Chg.	2022	2023	% Chg.
Germany	158.352	177.472	12,1	116.654	129.272	10,8	0,74	0,73	-1,1
UK	107.931	97.502	-9,7	156.630	123.144	-21,4	1,45	1,26	-13,0
USA	115.612	111.126	-3,9	92.185	91.618	-0,6	0,80	0,82	3,4
France	116.595	110.342	-5,4	74.196	60.839	-18,0	0,64	0,55	-13,4
China	26.548	22.769	-14,2	29.349	21.753	-25,9	1,11	0,96	-13,6
Canada	23.840	26.072	9,4	17.677	19.032	7,7	0,74	0,73	-1,6
Switzerland	15.046	12.324	-18,1	25.495	18.935	-25,7	1,69	1,54	-9,3
Japan	10.426	8.125	-22,1	11.214	9.488	-15,4	1,08	1,17	8,6
Total	574.350	565.733	-1,5	523.401	474.081	-9,4	0,91	0,84	-8,0
Aggregated total	1.356.961	1.295.636	-4,5	5.566.854	5.481.567	-1,5	4,10	4,23	3,1

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

BULK WINES: % CH. VOLUME BY QUARTER



a +14% increase over 2021. The same holds true on the American market—the overall leaders, who were experiencing 8% growth a year ago are now slowly returning to pre-2022 volumes.
The Swiss market is stable, with Italy and Spain experiencing price reductions. However, the volume balance is positive for Italian wines (+2%), compared to a 4% decline for Spain's *botegas*, while the French lose 8%, along with a 6% dip on the value side.
Spotlight on the oriental market: China undergoes a slowing trend of imports, with an overall drop of 40% (331,000 hectolitres), involving all main suppliers: France -27%, Chile -53%, Italy -40%. The U.S. surprisingly overtakes Spain and grabs the fourth position for the first time in terms of supplies (+45%).
Japan boasts a healthy market, at least for Italian products, which meet important volume increases (+14%), compared to all the other main suppliers, including France (-3%), the U.S. (-16%) and Chile (-12%). Values are on the rise, driven by the yen's weakness.
South Korea sustains a comeback from a 2022 that had already shown weakening signs compared to an extraordinary 2021. Italy is back below the 2-million-litre threshold per quarter, which had not been seen since the fourth quarter of 2020.

Sparkling Wines in Major Countries

In Germany, which is still experiencing an inflationary landscape (overall average at +12%), Italy (+16% in list) brags volume increases of 2% compared to France remaining stable and to Spanish Cava losing -7%.
The curve by quarters indicates the potential maintenance (albeit laborious) of the 5-6 million litres per quarter threshold, which had become the norm since the onset of the pandemic.
In the UK, sparkling wines continue running out of steam: March showed -20% in volume, Italy had the worst performance (-30%), followed by France (-6%). Imports from Belgium remain solid, even for Prosecco (+9%): however, bubbles from Veneto-Friuli face a negative overall balance (-26%) due to a 30% drop of direct shipments from Italy.
In the U.S., for now, the rhythm is still beating strong, with Italy soaring by +13%, ranking the first quarter of 2023 as the best ever (above 260,000 hectolitres). Champagne declined (-20%), slowly returning to more reasonable pre-pandemic rates.
The French import dynamic remains positive, while sparklings benefit from an overall positive volume result of +11%, due essentially to Italy (+14%), which compensates for the Spanish decline (-8%).
Finally, in Japan, bubbles don't follow the positive dynamic seen with still wines, with Italian sparkling facing a sharp drop (-22%) along with Spain (-8%), while Champagne shipments are going full steam (+14%).

Bulk wines

In Germany, Spain and Italy, export reached important quantities, driven by rather heavy inventories, especially for reds as far as the *Bel Paese* is concerned, closing the quarter at +30% for ordinary wines against average prices down more than 20%.
Spain, on the other hand, is doubling its supply of whites, now considered Italy's weak point.
Lastly, on the French market, volumes are slightly going down (-5%), due to a slowing down of Spanish shipments (-7%), partly replaced by Italian shipments (+13%), which have become more aggressive price wise (-9%).

SPARKLING WINES

GERMANY

	,000 litres		,000 Euro		Euro/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	5,253	0.5	76,539	10.8	14.57	10.2
Italy	5,734	2.1	25,710	18.6	4.48	16.1
Spain	3,431	-7.0	8,562	1.9	2.50	9.6
Austria	66	-21.6	477	-19.6	7.27	2.6
South Africa	11	5.7	102	36.0	9.19	28.6
Ukraine	4	-90.2	17	-93.0	4.47	-28.3
Others	171	110.7	659	81.5	3.85	-13.8
Total	14,669	-0.5	112,066	11.6	7.64	12.2

UNITED KINGDOM

	,000 litres		,000 Pounds		Pounds/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	4,603	-6.2	100,570	3.1	21.85	9.9
Italy	16,310	-29.1	62,069	-17.1	3.81	16.9
Belgium	3,465	17.5	15,059	16.7	4.35	-0.7
Spain	3,129	11.0	9,497	19.3	3.04	7.5
South Africa	179	-31.7	1,209	-8.2	6.77	34.3
Australia	148	23.9	674	32.8	4.56	7.2
Germany	22	-92.9	448	-65.8	20.40	379.8
Others	276	-17.8	3,869	7.8	14.00	31.1
Total	28,132	-18.9	193,395	-3.3	6.87	19.3

USA

	,000 litres		,000 $		$/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	8,425	-19.7	241,196	10.9	28.63	38.1
Italy	26,264	13.0	145,259	15.7	5.53	2.4
Spain	4,668	9.4	20,204	3.3	4.33	-5.6
Germany	71	-61.1	409	-56.1	5.76	12.7
Australia	60	-47.1	330	-50.5	5.55	-6.5
Others	581	-23.3	4,117	4.4	7.08	36.2
Total	40,068	2.6	411,515	11.8	10.27	9.0

BOTTLED WINES

GERMANY

	,000 litres		,000 Euro		Euro/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
Italy	50,658	4.2	172,076	-2.1	3.40	-6.0
France	22,515	5.0	94,951	5.3	4.22	0.3
Spain	20,061	8.1	48,488	7.4	2.42	-0.7
Austria	6,058	-2.7	16,589	5.3	2.74	8.2
Usa	2,708	-6.0	16,312	22.6	6.02	30.4
Portugal	3,386	-3.3	10,974	-3.6	3.24	-0.3
Australia	2,097	125.4	7,951	66.9	3.79	-26.0
South Africa	1,620	-24.8	6,106	-9.1	3.77	20.9
Others	6,646	0.5	21,144	9.8	3.18	9.3
Total	115,748	4.3	394,591	3.2	3.41	-1.1

USA

	,000 liters		,000 $		$/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	28,685	7.6	348,986	22.7	12.17	14.0
Italy	50,929	-0.8	346,107	5.4	6.80	6.3
New Zealand	21,717	38.5	160,567	40.5	7.39	1.5
Spain	11,031	19.1	67,176	19.2	6.09	0.0
Argentina	10,091	-5.0	50,709	1.0	5.03	6.3
Australia	15,571	-20.5	49,628	-27.7	3.19	-9.0
Chile	8,982	2.4	30,917	2.6	3.44	0.2
Portugal	4,814	5.6	25,131	0.4	5.22	-4.9
Others	9,782	-7.8	61,409	-7.7	6.28	0.1
Total	161,603	2.9	1,140,630	11.4	7.06	8.3

CANADA

	Litres		$ Canadian		$ Canadian/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
USA	10,578,341	-13.3	121,839,029	-9.3	11.52	4.6
France	10,088,079	1.4	109,687,607	13.5	10.87	12.0
Italy	11,705,348	-20.2	97,536,341	-18.6	8.33	2.0
New Zealand	3,363,921	0.3	33,956,894	-1.4	10.09	-1.7
Spain	3,844,295	-17.9	30,725,885	-8.9	7.99	10.9
Australia	3,459,798	-42.2	24,756,986	-42.9	7.16	-1.3
Chile	3,252,129	-29.3	17,290,535	-32.8	5.32	-4.9
Argentina	2,196,177	-36.3	16,897,521	-31.0	7.69	8.3
Others	4,963,060	-14.2	34,805,838	-10.4	7.01	4.5
Total	142.368.341	5,2	1.226.905.791	8,8	8,62	3,5

BOTTLED WINES

UNITED KINGDOM

	,000 litres		,000 Pounds		Pounds/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	21,702	-20.1	190,852	6.2	8.79	33.0
Italy	24,651	-7.2	73,217	2.5	2.97	10.4
Spain	18,095	8.7	59,466	17.4	3.29	8.1
Belgium	14,556	29.6	43,251	20.5	2.97	-7.0
New Zealand	8,240	14.7	41,699	21.6	5.06	6.0
Australia	6,190	-31.6	22,286	-14.5	3.60	25.1
Chile	7,104	-30.6	20,008	-29.9	2.82	0.9
Argentina	5,059	-33.8	17,616	-19.4	3.48	21.8
Netherlands	5,158	-0.9	14,740	20.5	2.86	21.5
Others	13,688	-30.6	65,087	-21.6	4.75	13.0
Total	124,444	-11.5	548,221	0.8	4.41	14.0

JAPAN

	,000 litres		,000 Yen		Yen/litre	
	2023	% Chg.	2023	% Chg.	2023	% Chg.
France	8,569	-2.8	13,178,060	18.3	1,537.89	21.7
USA	1,859	-15.5	4,777,371	15.2	2,569.19	36.4
Chile	11,219	-11.6	4,420,922	0.3	394.06	13.5
Italy	6,217	13.7	4,209,744	23.3	677.15	8.4
Spain	4,226	7.2	1,570,775	17.7	371.72	9.7
Australia	1,248	-18.3	728,550	-8.5	584.00	12.0
Germany	664	22.7	532,919	48.5	802.29	20.9
New Zealand	367	49.3	476,387	75.6	1,298.41	17.6
Argentina	318	46.2	258,429	93.7	813.26	32.5
Portugal	402	10.1	248,847	34.8	619.11	22.4
South Africa	330	5.2	197,857	6.8	600.11	1.6
Others	507	5.8	539,181	50.7	1,063.32	42.4
Total	35,925	-2.4	31,139,042	16.5	866.78	19.4

NEXT NOVEMBER IN AMSTERDAM

The World Bulk Wine Exhibition IS ON

WB WE 15TH World Bulk Wine Exhibition

The year 2023 was a particular year, with some uncertainty and concern on the markets, both for the war in Ukraine that does not seem to end, and for price increases and inflation pressure. But also a year in which there is a great desire for recovery, after the difficulties of the pandemic. The World Bulk Wine Exhibition collects and concentrates this energy. We talked to Otilia Romero de Condés, chief executive of the World Bulk Wine Exhibition about the new trends in the bulk wine market and what to expect at WBWE 2023 in Amsterdam in November

Otilia Romero de Condés

The new edition of the World Bulk Wine Exhibition will be back this following 21st and 22nd of November in Amsterdam. How does the 2023 edition promise to be? What events are confirmed and what are the new ones for exhibitors and visitors?

In 2023 we are launching a new motto which I believe reflects the spirit of this new WBWE phase: Where Wine Brands Are Born. The WBWE is a unique event in the wine fair ecosystem because it is the heart of the industry. What we have noticed over the years is that it is a place where professionals come with an open and creative mindset. The WBWE is the fair where wine brands are born, and foundations are laid. Here we discuss the terms of what will become concrete brands that people will then buy and take home. This is where all the stories begin, and we love that sense of freedom our visitors enjoy at the WBWE.

This year we'll be dealing with the hot topics in the wine business today. The speakers are of the highest level; and there are several surprises for our regular attendees. We want the WBWE to be a different fair every year while keeping our raison d'être intact: doing business.

The attendees will have the opportunity to attend conferences such as the following:

Maintaining quality yet breaking away from conventional packaging

- Spain, quality in all shapes and sizes.
- No & Low, there is a market out there!
- Canada, doing business in the land of maple trees.
- China, what now?

And most importantly, they will have the chance to meet some of the most prestigious professionals of the moment, people like: Amelia Dales from Packamama; Rob Malin from When in Rome; Andrew Ingham from Interpunkt; Barclay Webster from Free Flow Wines; François Simard, Head Manager of Station 22; Sebastien Thomas, Co-founder of Moderato; Laura Willoughby MBE, Co-Founder of Club Soda; and Florian Ceschi from Ciatti, amongst many others. And of course, we will gather the most important wineries from more than 20 different producing countries.

In recent years, the world of wine has had to deal with a difficult economic scenario. First the pandemic, then the war in Ukraine and the inflationary crisis, with the increases in the prices of raw materials and energy. How is the world of bulk wine facing this situation? What can the fair do to help?

Recently, talking to an important international wine consultant, he told me that bulk wine is the golden boy. If I had to dedicate myself to just one segment of the market right now, I would choose either bulk wine or "fine wine."

These two extremes are where the most interesting things are happening in the market right now, and new possibilities are emerging for wineries.

There are many factors that have brought us to this point, in which more and more importers and private label producers are looking for quality bulk wines with a distinct personality, and are willing to pay for them. As you rightly mentioned, the crisis triggered by inflation and the war is prompting an increasing number of professionals to opt for alternative packaging and solutions that have the same origin: bulk wine. Bulk wine, before it is bottled, has a spectacular potential in terms of marketing, creativity, design and the ability to attract new consumers. The WBWE is the great driver of this boom right now because we are working in two directions: on the one hand, encouraging this debate, and helping wineries and entrepreneurs to reach agreements, and on the other hand, facilitating business and taking it to the next level, thanks to the unique opportunity we provide to explore the best of the world's harvest in two days and in a single location.

Focusing on the 2023 edition in Amsterdam, have you foreseen initiatives or events that take into account the new trends that have emerged in the markets?

As we mentioned at the beginning, the WBWE is the place to find out before anyone else does about the trends that are going to shape the coming season.

The alternative packaging revolution has started, and the WBWE is the place where people are talking about it, and where the best business opportunities are emerging for entrepreneurs who want to be involved in the alternative packaging business.

Another major opportunity we will be seeing is that offered by dealcoholized wines for those wineries that produce bulk wine. There is a huge boom all over the world, driven by the new generations who are asking for other kinds of beverages.

Wineries must realize how this new sector of low-alcohol or non-alcoholic wines can be a business niche for their bulk wines.

That is why we will gather the professionals who are leading the way, so as to inspire and stimulate real business opportunities that work and generate wine sales here and now.

Last year's key debate has been the importance of starting to export in bulk given diverse reasons: price rates, the planet's sustainability, etc. Is anything changing? Have you seen the growth of this trend? In which countries, for what types of wine?

Prices, but above all, a growing global concern for sustainability is forcing all wineries to rethink their way of exporting and doing business. We believe that the WBWE can be a great opportunity for all those medium-sized wineries that had never considered participating because they do not sell large quantities in bulk.

At WBWE, you can find importers of private labels as well as importers with new ideas such as cans or taps, highly specialized buyers who come looking for great quality and a great deal of distinctiveness in the wines. Italy boasts great potential in this sense, so we strongly encourage wineries that have never seen an opportunity in the WBWE to take part. This is also your trade fair!

Before and after Amsterdam, what other events are you planning for the world of bulk wine?

We are thinking about relaunching the WBWE Asia. China is back on the road and back on the international market, and we are doing important work there to attract buyers. Our first foray into the Chinese market as a fair in 2019 was a success, then the pandemic hit and we had to slow down, but China is still a must-see country. The current figures show that their imports have slowed down a lot, but in the case of a country like China that doesn't mean we should stop betting on them. They still need a lot of wine.

In fact, this slowdown in imports has a positive side for bulk wine: China no longer buys so much bottled wine because it is increasingly committed to launching its own brands, but those Chinese brands depend on, to a large extent, international wines. The challenge for quality wines is to win the hearts of Chinese entrepreneurs who want to create their own private labels.

Another paradigm shift is that Chinese businessmen are no longer the ones who come looking for huge amounts of litres at low prices. They continue to buy a lot, but they are increasingly looking for higher quality, albeit at competitive prices. Wines from Spain, Argentina, Chile, and Eastern Europe are now being sold at competitive prices. Therefore, they have great potential in this market. *V.A.*

AN AWARD to the Wine Women in Mendoza

The Association of Wine Women of Argentina (A.MU.VA) held its traditional award ceremony for outstanding women on 1 April 2023 as part of International Women's Day

A.MU.V.A.
ASOCIACIÓN MUJERES DEL VINO DE ARGENTINA

In the 9th edition 2023, Rosana Vallone, Full Professor of the Department of Soil Sciences of the Faculty of Agricultural Sciences of the UNCUYO, was awarded in the category Didactics and Oenological Research. The event took place in the Tierras del Plata event hall in Chacras de Coria, Luján de Cuyo. Engineer **Rosana Vallone** received the award from the President of the A.MU.VA, Cristina Pandolfi. This year the categories distinguished by A.MU.VA. were: Wine teaching and research, Wine marketing and entrepreneurship, Urban planning and wine landscape, Oenology and Development, Wine Communication, Plastic artist, Tourism and Hospitality Technological Innovation. With Rosana Vallone were also awarded **Lis Clément**, Wine Marketing and Business Woman, a distinguished marketing and communication professional with over 15 years of proven experience in wine marketing. She worked at Wines of Argentina as Marketing & Communications Manager, where she created Malbec World Day, an event celebrated in more than 60 countries. She worked as Senior Brand Manager at Peñaflor Group (the largest wine company in Argentina) and founded Foster Newton, a wine marketing agency. The creative mind behind the successful implementation of a variety of communication and marketing plans for brands such as Susana Balbo Wines, Bodega del Fin del Mundo, Trivento, Rutini Wines, Cadus Wines, Finca Sophia, Finca El Origen, among others. The third woman of wine to receive the award is the winemaker **Lorena Mulet** has specialised in sparkling wine since the beginning of her career and today is in charge of winemaking at Bodega Cruzat, one of the top sparkling wine producers in South America. Cruzat leads the premium market with an entirely traditional method of production, including their icon wine Millésime which spends a decade on the lees. The vineyards are in the Uco Valley, including Vista Flores where their superb Single Vineyard Finca La Dama Blanc de Blanc comes from. When asked her what is the one winemaking technique you really geek out?

"When you make sparkling wine, it's very important to make a good quality base wine," she said. "That's why during harvest, I spend more time at the winery than at my house. The pressing and the health of the grapes will determine the quality of your base wine and I'm quite obsessive when it comes to these two steps of the winemaking process. I'm also very keen on malolactic fermentation because there's an unexpected transformation that occurs in the wine and I like playing around with the liqueur d'expedition and testing the impact of the dosage."

Roxana Badaloni, journalist was honoured for her commitment to wine communication and **Mariana Cerutti** for tourism and its concept of hospitality that has brought Bodega Andeluna. "Because we believe it is something that transcends tourism," she said. "Tourism is basically a service, hospitality is a whole. It is a set of sensations and emotions that the passenger experiences when he or she makes the decision to come, from answering an email, to the attention on the phone, when he or she arrives and we receive him or her, or when he or she enters the lounge, immediately someone welcomes him or her and explains to him or her where he or she needs to go according to the experience he or she wants to have."

The award for innovation and technology was picked up by young **Sofìa Ruiz Cavanagh**, Degree in Oenology, Specialisation in Viticulture and Oenology, Diploma in wine tourism. Lover of wine, tourism and digital communication.

The women of the wine association of Argentina are also planning collaborative work on wine training activities, especially for people who work in the wine tourism and hospitality sector, within the framework of the agreement signed with the Ministry of Culture and Tourism of Mendoza, last year.

Wine women at work and moments from the award ceremony in Mendoza

IN THE VINEYARD AND

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

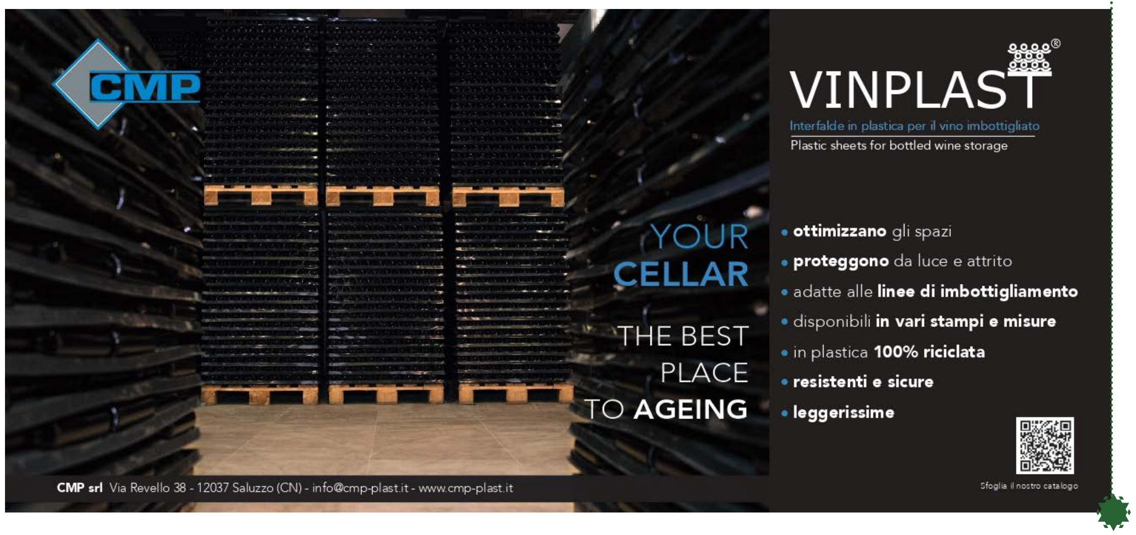
AROL

Capping Solution for Ropp Aluminum Caps

White wine, red wine, sparkling wine, semi-sparkling wine, spirits: Arol provides capping machines for the widest range of container sizes, shapes, and types as well as various type of caps, ensuring quality and integrity of the final product. Within its wide range of products, we find the solution that responds exactly to the needs of those wine makers who use aluminum Ropp aluminum caps: Euro VA. Its design facilitates instant liquids drainage: a solution that avoids the accumulation of material and the consequent hygiene problems. In its washable version it is completely washable. It can integrate an inert gas injection device, positioned at the end of the descent channel, avoiding any negative action of oxygen that could cause problems of oxidation of wine. Euro VA has excellent characteristics of flexibility thanks to its predisposition for the rapid format change of both the caps and the bottle (which can normally vary from 0.375 to 1.5 litres). It allows to offer each winery a solution designed to meet its specific installation needs, adapting to the most different production contexts from 1,000 to 72,000 BPH. The Arol technical support is available for the whole life cycle of the machine and counts on a highly skilled team of specialist operating from each of our 11 worldwide offices.
Discover this and other Arol solutions for wine capping on www.arol.com.

CMP

Vinplast, a Recycled Plastic Interlayer for Refining Wine in Bottles



In 2006 CMP Srl has developed an alternative solution for the storage of bottled wine. CMP creates Vinplast, a recycled plastic interlayer for refining wine in bottles, which is undoubtedly the best storage system in terms of practicality, safety and cost-effectiveness. CMP has made over 15 molds to solve the needs of each customer and to guarantee the maximum protection of each bottle. The interlayer pads can suitable for 0.375 bottles as 1.5 litre magnums in total safety and they guarantee optimal conservation of wine and glass. Using this system the customer can optimize the space in his cellar, using all height possible, with advantages even for the aesthetic point of view. The bottle is stored and protected from dust and light, the glass is preserved from any scratch. Bottle counting is facilitated by the constant and precise number of bottles per tray. When the layers aren't used, the space occupied is minimal compared to traditional systems. In addition each tray weights less than one kg and so it is extremely handling. Vinplast is undoubtedly is the best way to age your wine. CMP has created a network of resellers in many countries to be widespread in the distribution and to be able to satisfy the needs of customers with care and great attention.

ENOMECCANICA BOSIO

Crossflow Membrane Filters – Green Solution. Less Waste for Disposal, More Respect for the Environment

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

ENOVENETA

Lobev: Lobe Pumps for a Gently Product Transfer

A unique technology, that can be fitted into many production phases, always preserving the product quality. Every wine producer has a main objective: transfer the wine gently without compromise all the organoleptic characteristics. For that reason Enoveneta has designed the Lobev series lobe pumps with standard and helicoidal lobes. These pumps are perfect for any type of customer, from the small winery to the big wine producer. A small number of rotations and a constant working temperature characterize the Lobev pumps. These technical features allow to treat the product gently avoiding grapes damage, during the transfer of whole grape, or foam formation, during the liquid transfer. The versatility of our pumps allows to use them on transferring from tank truck, pouring, refrigeration, bottling and many other vinification phases. All Lobev pumps are complete of PLC with 7" touch screen that can manage all the working phases. The latest generation software includes many advanced functions that allows to have an automatic control of some working parameters. For example, the PLC allows to set the outlet pressure and to check it automatically, or also there's a self-learning feature for the flow adjustment depending on inlet. Our lobe pumps have flow rates from 80 to 1000 hl/h and hydraulic head up to 40 meters. The accessories list includes the electromagnetic litres counter, the remote radio control, and the enzymes dosing pump.
Info: www.enoveneta.it

IN THE CELLAR

ERO
ERO-VITIpulse Combi: Two Defoliation Systems in One Machine Ensure Gentle Defoliation with Optimal Results

The ERO-VITIpulse Combi 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

MBF
Innovation that Looks Ahead

Flexibility and high customisation are the essential requisites that make MBF stand out. At a time when it is increasingly difficult to meet the ever more diverse demands of the market, it is important to meet the requests of ever more discerning consumers. MBF has always focused on the opportunities offered by new technologies, being a standard bearer for everything to do with innovation and research. This feature is embodied in the machines designed and analysed down to the smallest detail to offer customers the best performance and the highest ergonomics, with a special focus on sustainability and energy savings. For over 25 years, MBF has been designing, developing and carrying out a string of innovations aimed at streamlining and improving our machines, including the universal equipment like pads, centring cones, starwheels and inlet/transfer screw; quick change devices and spring change system for screw heads. The continuous dialogue with our customers leads us to developing the required innovations in order to find the ideal solution for them. In the last year, MBF has filed two patents concerning the cork capping machine, aimed at increasing the flexibility of use and reducing cycle times, replacing manual setting up with automation. The former drastically reduces the format changeover time, required to adapt the turret to the new format, almost eliminating it. Whereas the latter reduces to zero the switch from straight to champagne corking. MBF travels the route of professionalism and research. For us, being present with innovative solutions means being able to assure a clear answer to the needs of a constantly evolving market.

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 Dynamos HP with Increased Yield

The first patented dynamic rotary crossflow filter with newly developed HP monolithic discs. For: sweet lees; fermented lees; sulphured lees; semi-fermented wines; red and white still wines; liqueur wines; sparkling and bubbly wines (with Dynamos HP i, isobaric version). 15 Benefits: High and constant solids concentration (70-80%v/v); Extreme nominal flowrates (60-70 l/m²h); Very low energy consumption (0.3 kW/m²); 72-96 hours of filtration without rinsing; 7 / 14 days of filtration without washing; Short rinses (<40l/m²) and washes (<120l/m²); Insignificant use of detergents (10kg/cycle); Reduction of 80-90% of water consumption compared to traditional crossflow filters; No clogging due to polysaccharide fibres; Irrelevant oxygen uptake; No red colour reduction; Minimum transmembrane pressure <1.1bar; Calibrated backwash; Increased self-cleaning effect; Extreme mechanical, physical and chemical resistance of new HP disks. Surface from 0.1 to 28m² and modular expansions up to 128m². News: Additional dosing point for foamers; Flowmeter with conductivity meter for detergent monitoring; Warm water mixer; Special turbiditymeter also designed for high presence of CO_2; Continuous level probe and filtered extraction pump with controlled frequency; Continuous retentate extraction pump to work without recirculation. Dynamos HP is also made in an isobaric version for filtration of sparkling wines after foam press with a high content of solids in suspension.