

THE "WINE WORLD MAGAZINE" BECOMES A QUARTERLY

In the year after the serious Covid-19 crisis, our magazine steps up to four issues a year to speak to the global wine world and of the global wine world, through numbers, data, feature stories and analyses. We will broaden our coverage to less known aspects of the wine world thanks to international journalists, and discuss politics, economics, markets, but also sustainability and health. Following the tradition of the most ancient wine weekly in the world, *Il Corriere Vinicolo*, the WWM aims at becoming a tool and a place for international discussion. This is a special project that looks at the five continents where wine is a protagonist in the vineyard and on the table. Enjoy reading!



WINE WORLD MAGAZINE

by **IL CORRIERE VINICOLO**

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"GREEN" IS ONE OF THE NEW GLOBAL CONSUMERS' TRENDS AND WINEMAKING IN THE FUTURE

Organic, Sustainable & Natural wines: THE ANSWER OF "LIGHT WINEMAKING"

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Organic and sustainable wines are still the most appreciated by consumers also in the year of Covid, according to the 2021 report by Wine Intelligence, although their purchases are going down. And the new winemaking is working to give an answer to the request for "green wines" in the cellar. The future of winemaking in the words of Prof. Luigi Moio, vice president of OIV, who warns: Everything begins with perfect harmony between plants, soil and climate. If not, here is what happens



WHAT IS HAPPENING IN THE U.S. WINE MARKET?

In this wide-ranging interview with one of the most influential operators in the U.S. wine industry, we discuss the issues and perspectives of the most crucial country for wine imports and consumers, in the year when they seem to be approaching an exit from the pandemic. The global context remains uncertain, but Mr. Tobiassen is optimistically looking at the future. But there are a few conditions



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China drastically decreased, but also the U.S. For exports, France was penalized by American tariffs, while Italy stood stable. Production peaks for bulk wines, especially in the New World.

GLOBAL SALES DOWN 6% IN THE YEAR OF COVID

Sparkling wines in strong decrease. Here are all the data and analysis by Wine by Numbers, the dossier dedicated to global wine trade carried out by the Wine Observatory of the UIV

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OUR MAGAZINE'S "TOPIC OF THE YEAR" FOR 2021

PINK WINES A Growing Sector Increasingly Beloved By Global Consumers

Pink, rosé, blush, still, sparkling, but also dessert wines: a growing family of wines which the World Wine Magazine will focus its attention on this year with a series of articles ranging from production techniques, in the vineyard and cellar, to product innovations and the market. We will start with a feature on Italy, and Italian pink wines, and we will then move to France to discover the most famous "pink" wine region in the world, Provence



ALARM BELLS FOR THE WINE WORLD FROM THE E.U.

An attack On Alcohol (And Wine) IN THE NAME OF HEALTH



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Together with smoking and atmospheric pollution, harmful alcohol consumption is indicated in the E.U. Plan as one of the main causes for the spread of cancer. Both the supply chain and European politics are up in arms. "We will fight abuse but no demonization," said Jean-Marie Barillère, president of the Comité Vins, Domenico Zonin, vice president, and Sandro Sartor, president of Wine in Moderation. And while a Wine Intelligence study highlights consumers' growing attention to moderation and alcohol, scientific research, in the testimony of Prof. Ramon Estruch, (Barcelona University) and Nicolai Worm (German University), and in the factsheet drawn up by the Comité Vins, confirms that drinking wine in moderation is not harmful



2021 GLOBAL SOLA REPORT

In addition to a global overview and ranking of alternative wine types, this report also dives into a brief country-level analysis for each type of wine. For more information about the report, please visit www.wineintelligence.com/downloads/global-sola-2021



Long Lasting
Protects the Environment
Waste free Carbon Neutral
High Quality Expensive Great Taste Natural
Socially Responsible Less Processed



Size of words:
Size of font proportional
to weight of response

Base = All Australian,
Canadian, UK and US regular
wine drinkers (n ≥ 1,000)

**WINE INTELLIGENCE'S PORTRAIT.
THE GLOBAL MARKET**

Organic Wines Overcome Sustainable Wines. But Consumption Drops

by PIERPAOLO PENCO, Country Manager for Italy at Wine Intelligence

Sustainability has been an important trend throughout the past few years across all sectors and Covid-19 has only increased the discussion. While lockdowns across multiple countries have resulted in images of clearer skies and bluer waters, there has also been a rise in discarded facemasks and increased packaging as more people shop online and get things delivered. Consumers, in fact, most strongly associate sustainable wine with protecting the environment and rely on official sustainability endorsement for reassurance. They also believe that glass bottles deliver a sustainable form of packaging (see pic.1). Has Covid changed our relationship with sustainable and organic wine? In general terms, concerns about climate change and buying local appear to be scoring highly amongst consumers in the Covid era, with some differences across markets. For example, Australian and Japanese consumers are more likely to expect brands they buy to support social causes, and US consumers are more willing to seek out sustainable products in general. Amongst the range of sustainable wine types that resonate most with drinkers, organic wine holds its #1 rank in the Wine Intelligence Global

SOLA Wine Opportunity Index amongst alternative wine types. However, within the data we are seeing some changes that may cause concern for the many wine businesses around the world that are dedicating time, effort and resources to migrating their production towards organic, sustainable and related disciplines. In this first update since 2019, the "Global SOLA: Opportunities for Sustainable and Organic Wine 2021" report looks at just how much Covid-19 has impacted wine consumers' views about sustainable and alternative wines. We measured wine consumer attitudes towards 13 types of alternative wines, including organic, sustainably produced and environmentally friendly wine, amongst others. To do this, we surveyed over 17,000 regular wine drinkers across 17 markets, with the sample representative of approximately 313 million wine drinkers. Using four measures (awareness, intent to purchase, purchase consideration and affinity), our SOLA Wine Opportunity Index shows which alternative wine types have the strongest market potential. The index is weighted to reflect the size of the wine drinking population in each market, enabling the SOLA wine opportunity index to be reflective of the global market opportunity (see pic.2).

Opportunities Across Markets
Our research shows that organic wine has much higher awareness levels than other alternative wine types; its strength arising from a high level of understanding about the concept of organic from other food and beverage categories. There is a particularly strong opportunity in the European markets of Sweden, France, Germany and Switzerland, where organic products are more present in general terms, and also more specifically in wine. Organic wine ranks amongst the top 3 wine types for opportunity index in all markets, with the exception of in Brazil, New Zealand, Portugal and Spain. Organic wine is universally associated with being more environmentally friendly and more expensive compared with other alternative wine types, although these associations are similar to those for sustainable and environmentally produced wine in general. Additionally, organic wine is more associated in Europe with being more ethical, while in Japan, North America and Australia with being better for one's health. In terms of the SOLA Wine Opportunity Index as a whole, awareness of most alternative wine types has increased since 2019. In fact, all but Fairtrade wine and non-alcoholic wine has increased its awareness score by at least 1 point, with environmentally friendly wine seeing the biggest increase in awareness amongst the markets analysed in this report. However this increase in awareness is counterbalanced by decreasing consideration and affinity amongst consumers in the past 12 months, which is true for all alternative wine types, not just organic. The net effect is to decrease opportunity index scores for SOLA wines across the board. This suggests that although consumers are more aware of alternative wine types and sustainability in wine, they are not yet making the conscious decision to choose a sustainable wine over one without these credentials. The exception is gains for vegetarian wine, although this still remains at the bottom of the ranking and labelling a wine as vegetarian is not yet a purchase driver for wine choice (see pic.3).

In the year of Covid, the interest in purchasing organic and sustainable wines went down, but organic wines are still the most appreciated by consumers. In the 2021 Wine Intelligence Report on the Opportunities for SOLA wines (sustainable, organic and with low alcohol), different scenarios emerged among consumers in different countries. Knowledge of these wines is growing, but the search for familiar products, a classic trend in a pandemic, is stopping their purchase. The labels for organic and sustainable wines yet, as long as certified, remained an element that consumers appreciate

PIC. 2 - SOLA Index score by wine type
Stable ranking of SOLA wine type opportunity in 2021 compared to 2019, although declines in the level of the opportunity for the majority of wine types

Type of Wine	Global SOLA wine opportunity index		
	2021 weighted opportunity index	2019 score difference	2019 rank difference
1st Organic wine	47.9	-0.1	=
2nd Sustainably produced wine	42.1	-2.1	=
3rd Environmentally friendly wine	41.1	0.2	1 ↑
4th Fairtrade wine	38.6	-2.7	-1 ↓
5th Preservative free wine	37.3	-1.7	=
6th Sulphite free wine	34.2	-2.7	=
7th Wine from a carbon neutral winery	32.1	-0.5	=
8th Lower alcohol wine	31.4	-0.2	=
9th Orange / skin contact wine	27.6	-3.0	=
10th Biodynamic wine	27.4	-1.2	=
11th Non-alcoholic wine	24.9	-1.7	=
12th Vegan wine	22.1	-3.5	=
13th Vegetarian wine	21.8	1.5	=

Net Purchase Intent
This observed year-on-year trend may relate to a broader finding that we have been tracking across almost all wine consumption markets in the Covid era: consumers are sticking with what they know and are shying away from experimentation and adventure. Since March 2020, when we started tracking the impact of Covid-19 on wine consumer behaviour, wine drinkers around the world have been consistently turning to wines

they view as familiar, safe, trustworthy and reliable. We hypothesise that this could be either due to having less time to shop, and therefore making quick decisions when in the store, or consumers having less spare cash or fewer occasions to trial a new type of wine. The loss or severe restriction of the on-premise channel in many markets, taking with it the opportunity for hand-selling a non-traditional product, may also be playing a role. It is well-known that an important channel for selling and marketing organic, biodynamic, orange/skin contact wines or those that refer to "natural" production methods is the on-trade (from trendy wine bars to the wine lists of many restaurants including fine dining). The cancellation of many events and specialist fairs that put producers in contact with experimental and often ethically-involved consumers may have also impacted this trend. There is also plenty of positive food for thought in our new research. For instance, we ran an experiment with our label testing survey method to see what effect different claims about a particular wine might have on intent to buy.

PIC. 3 - SOLA wine type opportunities across markets

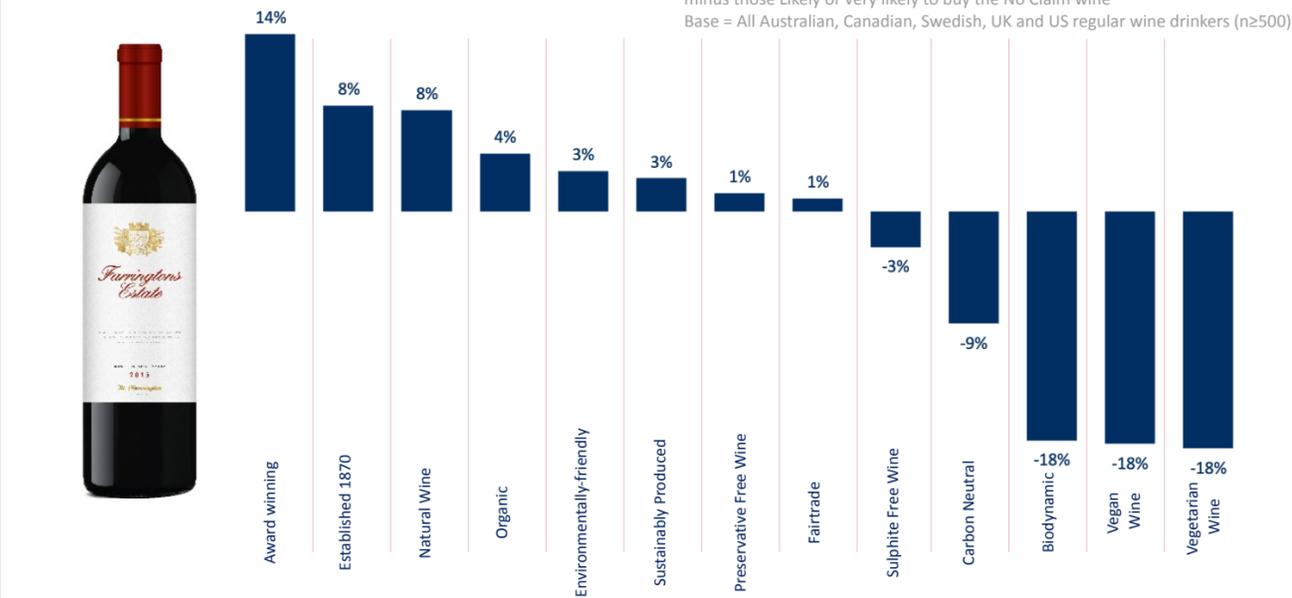
 = ranks among the top 3 in the market

Rank	Type of Wine	AUS	BEL	BRA	CAN	DEU	FRA	IRL	JPN	NLD	NZL	PRT	KOR	ESP	SWE	CHE	GBR	USA	Weighted opportunity index
1st	Organic wine	42	47	48	44	54	56	51	50	46	38	32	48	33	65	54	45	48	47.9
2nd	Sustainably produced wine	42	40	52	39	46	31	45	28	38	39	46	36	45	45	45	43	45	42.1
3rd	Environmentally friendly wine	39	30	45	36	39	41	43	33	31	39	30	46	51	40	41	40	43	41.1
4th	Fairtrade wine	36	44	35	35	45	31	49	26	43	30	29	39	40	50	40	53	40	38.6
5th	Preservative free wine	40	28	49	34	30	30	35	55	25	27	32	33	32	31	27	35	38	37.3
6th	Sulphite free wine	36	36	27	34	28	45	35	37	24	29	35	23	39	27	31	34	37	34.2
7th	Wine from a carbon neutral winery	33	26	35	28	33	24	35	28	21	30	25	28	32	32	28	36	38	32.1
8th	Lower alcohol wine	39	23	50	27	29	22	38	23	29	41	36	33	31	27	20	35	28	31.4
9th	Orange / skin contact wine	27	21	27	29	28	17	28	32	21	19	22	28	28	30	17	28	33	27.6
10th	Biodynamic wine	26	28	29	24	27	32	32	27	21	22	17	25	19	24	31	28	29	27.4
11th	Non-alcoholic wine	31	25	33	25	28	18	34	22	29	30	17	27	22	37	15	31	20	24.9
12th	Vegan wine	23	21	24	20	22	12	22	17	19	21	18	26	20	30	20	28	26	22.1
13th	Vegetarian wine	20	19	21	19	18	17	22	18	19	17	20	22	23	20	10	25	27	21.8

PIC. 4 - Net purchase intent of wine types: Global view

Wine that has either an award or suggests longevity drives consumer purchase more than other types of endorsement. Consumer confusion regarding natural wine persists

Net intent to purchase: Net score compared with 'no claim'
% who would be likely or very likely to buy each wine minus those Likely or very likely to buy the No Claim wine
Base = All Australian, Canadian, Swedish, UK and US regular wine drinkers (n≥500)



What we found was that making a sustainability claim on a product's label increases a consumer's intent to purchase. When compared to a wine without any claim, displaying 'organic', 'environmentally friendly' or 'sustainably produced' on a wine label tends to have a positive impact on the intent to purchase. That said, it is interesting to note how these findings vary by market. 'Organic', for example, has a much stronger impact in Sweden and Canada than in Australia and the UK. Also interesting to note is that almost half of wine consumers say they only trust the sustainability of wines if they have an official certification (see pic.4).

When it comes to 'natural wines', this category carries an increased likelihood to buy, though this may be arising from confusion as to what 'natural' means in this context. A relatively high proportion of wine drinkers, in fact, continue to state that they are both aware of and have sought to purchase 'natural' wine with these levels not proportional to the availability and volumes of natural wine available. Additional qualitative research suggests that a proportion of consumers believe all wine to be 'natural' and the lack of an official certification in this field doesn't help.

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Luigi Moio

THE RESPONSE OF WINEMAKING RESEARCH
TO THE QUESTION OF CONSUMER HEALTH



Towards A New “Light Winemaking”

How does the challenge of sustainable, organic, “free-from” or no-alcohol wines involve winemaking science? In addition to the controversial world of “natural wines,” there is a “new winemaking” that works towards the objective of “cleaner” wines, through science. We spoke to Luigi Moio, professor of Enology at Naples University and vice president of OIV, who warns: Everything begins with perfect harmony between plants, soil and climate. Otherwise...

by ANDREA DONÀ

Never, as in recent years, has the subject of health of the individual and the community played such a key role in international forums, as well as in legislative acts produced by states and various supranational confederations or unions. Wine Intelligence’s annual report “*Opportunities for Sustainable and Organic Wine 2021*,” which is widely discussed in this issue of the magazine, shows how much awareness is growing among consumers to buy wines that are above all “sustainable, safe and reliable.” The concept of quality is not just a general advertising “sticker” attached to some appealing packaging, but represents the real value and protection of the most valuable of assets: our health. The last edition of the international forum wine2wine, promoted last November by Vinitaly-Veronafiere, placed under the magnifying glass the growing attention of US consumers towards the relationship between wine and wellness, highlighting how widespread (especially among young Americans) the interest is towards new “health” trends like “free-from,” i.e. without sulphites, a low alcohol content and low in calories.

But what impact will these new consumer trends have on agronomic and winemaking practices? Placing this aim of food health at the centre of producers’ attention must lead to updating production methods and practices, which are at the base of traditional agriculture, towards a new horizon of modernity that will not just be so-called digital farming or agriculture 4.0. Topics such as environmental sustainability and the approach to organic, on the other hand, are now permanently present on the agendas of international scientific organizations like OIV (International Organization of Vine and Wine). During its recent general assembly, it summarised the challenges (and priorities) of producer countries, who will have to move towards an increasingly green and less impactful vision than their current way of thinking about and growing vines. And we are starting our analysis with OIV, in order to understand which tools and methods winemaking science intends to use to pursue these challenges, which reach consumers (who are more sensitive to complex themes such as biodiversity, respect of the “vineyard” ecosystem and green agriculture) from the environment, through the taste of wine and, therefore, the market.

The vice president of what is considered the “UN of wine” is **Luigi Moio**, professor of enology at Naples University, as well as writer and vinegrower.

He is a scientific reference point for the organization who, coordinating the four commissions on economy, viticulture, enology and health and nutrition, deals with all the technical and scientific aspects of the wine production process. This work has now become a benchmark for all countries and institutions in the world that have to legislate on this very delicate subject. We are starting with a topical theme in Europe: the growing fascination with so-called natural wines, which is causing strong disagreements between producers, linked to the consumer demand for healthier products on the one hand, and more sustainable ones on the other.

Professor Moio, how do you see these trends from your OIV observatory?

Every five years, the OIV draws up a strategic

plan and the 2020-2024 one focuses on various topical themes: eco-responsible viticulture that respects the environment, sustainable growth, the globalized market, labelling, digital transition, development in a balanced normative context and consolidation of OIV’s role as a scientific and technical reference point on a global level. But in recent years, the final consumer’s great need to be reassured on the healthiness and traceability of wine has been observed, as well as for sound and clear messages from the production world, which in some cases are misleading and confusing for the consumer, like the term “natural wines.” On this subject, it is clear that the term “natural” wine is a controversial concept, as the definition contains the implicit assumption that it is a “natural” product. Historically, the definition of wine as the product of fermentation of fresh grapes was created to underline the purely agricultural or “natural” nature of wine and to differentiate it from other drinks of a more industrial nature. Wine, compared to other food products, possesses a great strength. It is made with just one raw material, grapes, which in themselves already contain all the necessary substances to make the final product. To all intents and purposes, wine is a mono-ingredient drink.

Yes, but wine is not only made in the vineyard.

Certainly. The grapes are picked, taken to the cellar perfectly healthy and man must essentially govern the transformation process while trying to not interfere with it as much as possible.

And talking about the cellar, we come to the key winemaking topic that has radically changed in recent decades. But where are we heading?

Winemaking is a relatively young science and is continually changing and improving. The most important discoveries of the last decades, I think, have been those of a biotechnological nature. I’m referring to selected yeasts and bacteria (two scientific conquests that have been overly demonized recently), the two elements that lay the foundations of modern, more up-to-date winemaking that can meet the needs of mankind and the planet, which we mentioned earlier. Going back to society’s environmental sensitivity (a fundamental topic that looks to the future of wine), concerns about the environment, high levels of agrochemicals and mistrust in industrial processes are extremely important factors of the global food market as a whole, which obviously need to be tackled with a scientific approach and in-depth technical knowledge of the various production problems. Today, when these subjects are dealt with in wine, we need to reflect on the often hostile and non-scientific rhetoric coming from the more radical part of the wine world on these aspects, questioning and comparing certain accepted ideas and practices to start off a healthy debate that can lead to improving and modernizing a very important and evolving sector.

Therefore, what role can winemaking play in this match? Is it necessary to create a new form of winemaking to face these challenges?

Firstly, we need to make an important distinction. There is basic winemaking (which we can

define as horizontal) which deals with all the “basic” principles of biochemistry, microbiology, plant physiology, agronomy, soil chemistry etc, then we have a specific kind of winemaking for every grape variety (which we can define as vertical) that gathers together all the winemaking characteristics of that variety. If we also add the territory to these two elements, which includes soil studies, zoning and analysis of the geomorphological components of the materials it is composed of, we obtain a kind of multidimensional cube whose resultant force creates the conditions for what I have defined as (within OIV) light winemaking: i.e., winemaking needing a number of invasive interventions by man that are, and must be, reduced to a minimum, bringing it up-to-date with respect to environmental topics and consumer health. This concept of light winemaking comes from the assumption provided by *varietal winemaking* I mentioned earlier, which foresees planting only one particular vine variety in the soil and the territory, with the best pedoclimatic conditions for creating a perfect balance between plant and environment which, in turn, are the necessary conditions for making great quality wines (though they are not enough by themselves). This perfect balance ensures the much higher likelihood that the grapes, once ripe, have well-balanced compositional parameters. As a consequence, the wine obtained will also have all its components balanced and its harmony will be mainly due to the concept of *terroir*. If this natural wine balance doesn’t occur, because of a compositional imbalance of the grape bunch due to inadequate harmony between plant, soil and climate, man must intervene more to compensate, correct and recreate the balance.

How does all this translate in the vineyard and cellar? Is new technological progress necessary to achieve light winemaking and therefore to produce so-called “free” wines?

Naturally, to create all of this it is necessary to have in-depth technical knowledge that covers all sectors of agricultural science and to always know how to question things: if a person is too certain in their convictions, they could lose their way. A good knowledge of complex issues allows us to pose questions, to reason, to prevent and, as a consequence, to intervene as little as possible to assist processes. In the vineyard and cellar, this translates into a fundamental passage that no longer foresees keeping viticulture studies and practices separate from winemaking ones, since the latter already start from the design and planning of the vineyard. The real progress towards light winemaking is the perfect integration of all these skills, as long as they are real and constantly updated. It is clear that technological progress is a key player in the historic passage we are witnessing, which must help and ease this transition, i.e. the transformation of traditional viticulture to a digital and interconnected one. I’m referring in particular to those components (GPS detectors, drones, forecast maps, sensors in the vineyard and cellar) which are readily available today and enable us to carry out predictive analyses to foresee and cancel out all those negative phenomena that can lead, firstly, to imperfect grapes in the cellar and, later, to a faulty product in the bottle. By following this

virtuous pathway, it is clear that we are going towards a new approach to vine growing that will be as least interventionist as possible, from an agrochemical point of view.

And how should the production world behave?

It is fundamental that producers evolve too and take part in this mainly cultural change. The most important thing is to start with a sound and sustainable winemaking project and, on the basis of this, to decide how to organize the production factors and all the knowledge and skills that are available on the market today. From a scientific point of view, I’m referring to skills in agronomy, plant physiology, plant pathology, biochemistry, particularly those pertaining to soil and water resource management, to return to themes of environmental sustainability and a correct management of a valuable asset like water. The real competitive advantage will be the development of a predictive capacity necessary to foresee harmful events. If, on the other hand, action is taken once the project is finished, at the closure, we will find ourselves forced to implement winemaking practices that are now obsolete and, in some cases, useless. A final factor that I would like to point out, which should be considered by the production world, is time. We need to become aware, and maybe the new generations will be more sensitive and attentive to this, that to create a great wine takes time, important investments and long periods, both to build up your skills and to see the practical results.

In your opinion are these themes shared in the scientific view of world winemaking?

Everything is moving globally and, for this reason, as OIV we wanted to include these themes among the strategic assets of our plan, to be dealt with together with other global organizations. We are more and more convinced that themes such as conversion to organic farming, environmental sustainability and saving energy can no longer be put off. Today, the focus is not so much on winemaking practices (though attention to these must be kept high, as well as controlling the behaviour of professionals) but more on the skills and health aspects of what goes into the bottle and respect for consumer health. We have to create the requirements so that, in the near future, the winemaker becomes an assistant to the whole process which starts with a raw material that must be excellent. The desire to produce wines with an organic approach in vineyard management and, therefore, with minimum possible “corrective” intervention during the winemaking process, is a wonderful and very noble aim. It is a direction the whole wine world must go towards in future, because it also leads to the real territorial expression of wine, obviously avoiding that sensory anomalies occur. Faults remain faults and irreversibly suppress what you imagine to make sensorially clear in a wine, i.e. its varietal and territorial authenticity! During these years it is necessary to build up the future of vine growing through mediation and collaboration with all the key players involved. And I say this as vice president of OIV: We don’t need walls or standpoints for a situation that can be simply managed by adopting logic and common sense, as well as continually-evolving scientific knowledge.

Q&A BETWEEN GIULIO SOMMA, THE WWM'S EDITOR-IN-CHIEF,
AND ROBERT M. TOBIASSEN, PRESIDENT OF THE NATIONAL ASSOCIATION OF BEVERAGE IMPORTERS, INC. (NABI)



Robert M. TobiasSEN

Covid And Tariffs. Distribution And Consumers. President Biden. The E.U. And China.

What Is Happening In the U.S. Wine Market?

In this wide-ranging interview with one of the most influential operators in the U.S. wine industry, we discuss the issues and perspectives of the most crucial country for wine imports and consumers, in the year when they seem to be approaching an exit from the pandemic. The global context remains uncertain, but Mr. TobiasSEN is optimistically looking at the future. But there are a few conditions

by GIULIO SOMMA

To the right:
Ursula von der Leyen,
Katherine Tai
and Joe Biden

President Biden's trade policy and its impact on the wine market. The clash or encounter between the European Union on digital taxation and the Airbus/Boeing case. The new Ambassador at the USTR, Katherine Tai, and the impact that the old and new strategies will have on tariffs. Finally, speaking of the changes that the

pandemic and the imports, affected by customs, will cause on the distribution strategies and on the purchasing attitudes of American consumers. The exclusive interview given by the President of the National Association of Beverage Importers, Inc. (NABI), Robert M. TobiasSEN, to our magazine, covers a lot of ground, looking at this moment and at the future of the most important country for

imports and consumption in the world. The situation remains uncertain, but Mr. TobiasSEN's words were marked by optimism. As long as Europe does its part to reach the so-called "0 for 0" principle, the no tariffs policy much longed for. American consumers love wine, our market will pick up and do well again, the president of American importers forecasted. But producers and partners need to collaborate.

Mr. TobiasSEN, we would like to start from a brief analysis of the "horrible year".

How did the year 2020 end from the point of view of US wine importers, and what were the areas showing the most critical situations in your domestic market?

Yes, 2020 was truly *annus horribilis* and our aspiration and goal is to finish 2021 and look back to see an *annus mirabilis*. We must never lose hope; we must learn how to adjust, stay resilient, and work together. Wine importers faced many disruptions in 2020: Airbus retaliatory tariffs applied for the full year with threats of the rates being increased by the United States Trade Representative (USTR); risks of retaliatory tariffs on countries adopting Digital Services Taxes; restaurants, bars, cafes, and pubs were locked down for much of the year in many major cities; supply chains were significantly disrupted from the lack of cargo containers to "blanc" or cancelled sailing of cargo vessels, as well as enormous port congestions; internal market distribution was handicapped by new constraints on truck and lorry drives as the States had no uniform or common rules on "essential workers; and, finally, a struggle until the very end of the year with Congress to enact permanently the Craft Beverage Modernization Act (CBMA) that provides significant tax benefits for importers and domestic producers of wine, distilled spirits and beer.

And all of this during the lockdown.

Yes. We must remember that all of these activities and efforts were happening simultaneously with offices closed, colleagues spread around in their homes and in-person meetings with trade officials and Members of Congress. Strategies had to be revised immediately. But with virtual meetings, emailing of documents, and, yes, even the telephone, we were able to move forward on many fronts.

How did you manage the cost increases due to the tariffs?

As you know, in the U.S. we have the three tier system of producer or importer, wholesaler/distributor, and retailer. Each of these tiers has its own mark-up margins on the bottle of wine. In many situations, the percentage rate of the tariff wiped out the margin. Some but not all importers received Federal Government funds for payroll under the COVID relief legislation for a short term period. So, some importers had to furlough or fire workers because the margin is where the importer makes its profits to cover salaries, among other expenses. Some importers increased import volume in January and February 2020, before the USTR mandatory review of action where it could raise the tariff rates, in order to avoid the risk of a higher tariff.

What impact did the closures of restaurants and other public spaces have?

During the COVID pandemic many restaurants, bars, cafes, and pubs (we call these "on-premise retailers") were locked down. Premium fine wines were a critical area hit hard by the loss of patrons who would purchase these higher quality wines with a

meal or try a new wine brand for the first time. While the sales at the wine shops and other merchants soared, it did not offset the losses of these premium fine wines.

Depending on the importer's traditional inventory of wines, obviously some importers suffered more than others. For the calendar year 2020, imports of bottled still wines (red, white, and rose) from France were down 37.5 percent compared to 2019, and sparkling wine and Champagne were down 2.6 percent. Looking at Spain, imports of bottled still wines were down 44 percent and sparkling wines were down 18.9 percent. From Germany, still bottled wines were down 12.9 percent and sparkling wines were down 9.6 percent. By comparison from Italy, bottled still wines were up 1.5 percent and sparkling wines were down 2.1 percent. However, imported bulk wines from France increased 140.9 percent and from Germany increased 68.5 percent, while bulk wines imported from Italy only increased 1.1 percent. We will talk more about bulk wine later.

Did you experience structural changes in your distribution strategies and in the purchasing attitudes of American consumers, which may become a "new normality" and thus will modify the market we have known until now?

Importers of wine sell the wine to wholesalers/distributors of wine who sell to retailers. Importers needed to see whether their distributors would share a portion of the retaliatory tariffs or adjust their margins to the retailer in order to mitigate the price increase to the consumer. The past year was a "wake up call" to importers to think about their contracts with both foreign suppliers and distributors and include contract provisions addressing future tariffs.

While bottled wine imports decreased from France, Germany, and Spain, bulk imports increased significantly. Under the original Airbus tariffs, only wine in containers not over 4 liters were subject to the retaliatory tariffs. (In January 2021, the outgoing Administration increased the wines covered by the Airbus tariffs and included bulk wines from France and Germany.) So, originally, all bulk wine imports escaped the retaliatory tariffs. However, imported bottled wine is qualitatively different than imported bulk wine. Many countries in Europe require bottling at the source for the controlled appellation of origin wines. The bulk wine cannot be bottled in the U.S. and bear the controlled designation on the label. The label of this wine bottled in the U.S. may use the varietal grape name of the general "red wine" or "white wine."

Consumers' purchasing habits have changed, as you know, from the huge increase in online wine sales or e-commerce. Online sales are governed by State law and not Federal law. The vast majority of State laws do not authorize importers to offer online sales to consumers. This is an area that NABI is focusing on closely so

importers may avail themselves of online sales directly to consumers. NABI is designing a business model framework that it can take to the States for consideration. However, the imported wines sold by a lawful online seller in the U.S. must have entered the U.S. marketplace through an importer.

Many States have temporarily allowed restaurants and other on-premise retailers to sell wine to "take out" or delivery customers, either by the glass or by the bottle. Restaurants rely on beverage alcohol sales to generate high margins to offset the low margins on food served. However, consumers are less willing to pay the full wine list price for a bottle of fine wine that they have to decant and serve themselves at home. Some fine restaurants have sold off their wine cellar inventories to wine collectors in order to raise cash to operate their establishment. Once restaurants return to "normal" they will restock some of these fine wines but, all indications are, the range of wine selections on the list will decrease significantly because of the upfront costs. Many State legislatures are currently deciding whether to make permanent the option for restaurants to continue to sell wine (and distilled spirits and beer) for take-away by the patron.

Finally, many food and beverage consultants are forecasting that consumers will continue to dine and drink more at home given their experience during the COVID lockdowns. Importers along with their foreign suppliers must develop promotion and advertising or influencer practices to attract these consumers. Few families have a live-in sommelier to make the wine recommendations and with more wine sales going online, the importers and foreign supplies need to figure out how to create a "pull" for their wines from consumers who become familiar with the brand name.

As we noticed, last year, customs duties strongly penalised French and Spanish exporters, while Italian overall exports were able to keep up. Is all this going to affect the future redistribution of market shares among these and other major wine exporting countries in the USA? Is it a transitory phenomenon related to customs duties or a structural change in the consumption attitudes and purchasing choices of trade channels and final customers?

For the past two decades, consumer interests in beverage alcohol, especially the younger generations, have been drinking all three products-wine, beer, and spirits- and are always looking for something new. We need to take into account that the U.S. economy is 70 percent consumer driven (as opposed to say China which is 39 percent consumer driven) and U.S. consumers have a pent-up desire to go out and make purchases across the board (provided the economy allows them to do so). For imported wines, any market share lost during the COVID pandemic is temporary. Consumers will forget the past and move forward like before.

This is why, during the USTR public comment period and early hearing on the Boeing/Airbus war, NABI made the point that wine is not fungible; that certain wine consumers have a distinct preference for a French or Italian controlled appellation wine. But we didn't manage to convince the panel, which simply responded that they believe alternate wines from the U.S. are comparable so the proposed tariffs (at that time) would not deny consumers a choice of wines. In their view, a Pinot Noir from Oregon is just the same as a Burgundy from France. (One of the factors considered by USTR in selecting products to be tariffed is whether there are similar domestic goods or goods from a non-tariffed country that meets the consumer's demands.)

The one area of concern is whether foreign suppliers will rely on the U.S. marketplace as a steady customer without new unexpected trade wars. Some foreign suppliers are looking at markets closer to home or to China and this may result in some brands in demand will not return to the U.S. in whole or in part. A news article on Burgundy recently made this point.

With regard to the current issues, the customs-duty war between the USA and the European Union has entered a truce. There are only four months for the truce to become an armistice and we will be able to go back to a policy of exchanges governed only by the laws of economy and no longer of geopolitics. What are you doing and what do you think should be undertaken between the two shores of the Atlantic to achieve the long-awaited "0 for 0" principle by both sides?

Since October 2020, NABI has advocated for a six-month mutual suspension of the Airbus and Boeing retaliatory tariffs because of the precedent in the French DST investigation, so we were pleased to see at least a four-month truce. NABI believed that once the WTO arbitrator awards were issued for both dispute settlement proceedings, that a suspension made sense to "lower the temperature" to foster serious settlement negotiations where each side knew the leverage of the other. Unfortunately, that was not former Ambassador Lighthizer's way of working.

But things have changed now. Geopolitics will still come into play but in a way that actually favors quick settlement of the Airbus and Boeing disputes. Simply put, China. Fundamentally, the global trade debate over State financial support to local industry and agriculture is perhaps the number one outstanding global trade challenge and is one that can only be resolved by negotiations at the World Trade Organization. The Agreement on Subsidies and Countervailing Measures was adopted in 1994, and must be updated to recognize the reality of State subsidies in non-market economies like China. The Airbus and Boeing subsidies pale in comparison to the State subsidies in China. "Don't sweat the small stuff." Reach a quick "band-aid" settlement reflecting the State subsidy principles you agree upon and come away from the negotiations feeling successful. The U.S. and the E.U. must work together on a common front, with other nations as well, to deal with these

State subsidies at the WTO where all 164 member countries, including China, can debate, negotiate, and (hopefully) agree on a new framework for the global trading community.

As far as trade policy is concerned, how do you consider the first signs of openness towards Europe by President Biden and the new USTR Katherine Tai on the issue of Airbus/Boeing and on the digital tax?

I have great hopes for Ambassador Tai. Her reputation for being a good listener, a problem solver, the grit of a good negotiator, and the ability and skills to earn the respect of both the Democrats, Republicans, and Independents in Congress evidenced by the unanimous vote recommendation by the Senate Finance Committee at her confirmation hearing and the 98-0 vote by the full Senate. In today's Washington, DC, this type of support is unheard of.

"We have to walk, chew gum, and play chess all at the same time" declared Ambassador Tai in her Day One Email Remarks to All USTR Employees.

Ambassador Tai used a similar phrase in her prepared opening statement before the Senate Finance Committee during her very successful and well received confirmation hearing. My interpretation of her statement is you have to go slow and not run into a trade matter ("walk"), you have to sit back and think and contemplate as you move forward ("chew gum"), and you must always be thinking ahead on what your opponent and you are anticipating as several moves ahead and where are you both ending up ultimately ("play chess").

Ambassador Tai said tariffs are a tool of trade and not the goal, so she sees value in tariffs when they work to achieve a specific trade goal but will use them lightly. In an interview with the Wall Street Journal over the weekend, Ambassador Tai said that the U.S. is not ready to lift tariffs on imports from China. So far, she has held nearly a dozen virtual "meet and greet" calls with her counterparts throughout the world but has not yet held one with her counterpart in China. Clearly, the fact she believes that tariffs are a leverage tool with China does not mean that she sees them as essential with the E.U. Her willingness to suspend the Airbus tariffs is evidence of this. She views each trade dispute separately on its own terms.

Throughout her confirmation testimony and subsequent written remarks, a worker-centric focus is a guidepost in her trade policy approach. She wants to engage with stakeholders that trade policy often overlooks and she wants to give "workers a seat at the table" in trade policy development. Looking at the readouts of her conversations with her counterparts in the European Commission, France, and Germany, all three highlight a mutual "strong interest in resolving the dispute related to large civil aircraft subsidies"; by comparison, the readout from the UK call simply refers to "resolving" this dispute in a list enumerating several trade topics. The UK did not continue applying the Boeing tariffs when



it left the E.U. and the sense is that USTR believes that the UK is now in compliance with the subsidy rules.

Another important step was President Biden's participation in the European Council Summit last week and made clear his view on the importance of the U.S./E.U. trade relationship. A prompt settlement of the Airbus/Boeing dispute would be a good first step in building back this relationship.

Clearly, the resolution of the Airbus and Boeing disputes is a high priority for building back better our traditional alliance with the E.U. and, in my view as expressed earlier, is a "low hanging fruit" to accomplish quickly. This coming June is a watershed mark and pivotal moment. USTR must reach a final decision on the general DST investigations by June 2, under the one-year requirement in U.S. trade law. Depending on its decision there, it may repeal the suspension of the French DST. The E.U. and UK retaliatory tariffs against the U.S. in the Steel and Aluminum Tariffs fight will double from 25 to 50 percent on U.S. exports of American whiskey and Bourbon at the beginning of June. And the four-month suspension of the Airbus and Boeing tariffs ends on July 4, 2021 for the UK and on July 11, 2021 for the E.U. So, June is an important time.

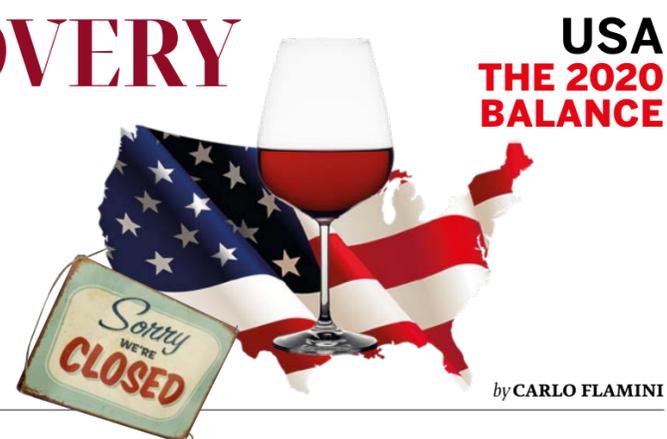
To sum up, sharing common views on trade, the U.S. and E.U. should be able to agree that wines, spirits, and beer should not be targets in trade disputes not dealing directly with these fine products that provide enjoyment and pleasure to consumers around the world. A tariff is, in reality, a tax. So, why tax happiness when the world clearly needs more of it?

Thank you, Mr. Tobiasen.

Dear Editor, I would like to thank you for the opportunity to speak with you about these important trade matters for bouth. I hope that as travel restrictions lift with safe conditions that I will be able to visit you in Italy and share a glass of wine.

THERE WILL BE NO RECOVERY WITHOUT RESTAURANTS

Covid is disrupting traditional market balances, which have lost 10% in value for the first time. Off-premise and online sales have rocketed, but for the on-premise sector the road to normality is all uphill



by CARLO FLAMINI

For the first time since 2009, the American market experienced a serious setback. In 2020, sales came to a halt just above the 67-billion-dollar value threshold, 10% less than in 2019. It has really taken a tumble. The pandemic hit hard, totally disrupting the classic balances of the market. Some segments have gained, even in an abnor-

mal fashion, while others have plummeted, especially the food service segment (on-premise), which has lost on average 40% in value due to closures and restrictions (Figure 1). Also down are sales at wineries, with losses of about a quarter of their value. The various off-premise segments have gained: from Direct-to-Consumer (+30%), a formula that has partly made up for the lack of tourists at

wineries, to liquor stores and groceries, which have gained on average 15% from an already strong position, up to the explosion of e-commerce, which has recorded increases of 400%, equal to 3 billion dollars. This combination of signs ended up disrupting the traditional distribution of sales per channel, producing a totally new scenario, which will not necessarily fall back into

the norm this year or the next one (Figure 2). Specialized and grocery stores increased their already sturdy leadership position from 37% to a share of 47%. Consequently, on-premise sales have decreased from 40% to 27%, as has the weight of tasting rooms, to 16%. There was a leap of 3 points for online sales, rising from 1% to 4%. Basically, in 2020 overall off-premise sales reached a total of 56% of

the value of wine sales in the US, compared to 42% the previous year.

On-premise. The Return To Normality Is A Long Way Off

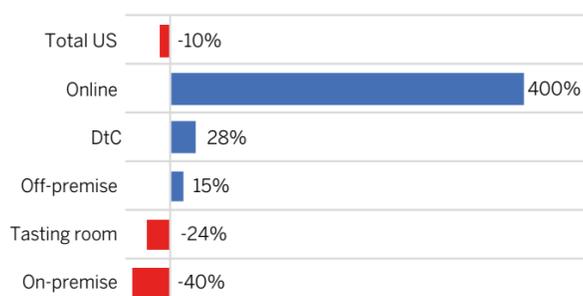
If supermarkets and liquor stores witnessed an exponential increase in sales, the food service segment has been the illustrious victim of Covid. According to surveys by Nielsen CGA, all the large States have recorded strong losses in the on-premise sector. Except for Texas, Florida and the southern States in general, all the large northern States, both east and west, follow impressive reductions of turnover percentages, with negative points on the Pacific coast: Washington -65%, Oregon -56%, California -62%. But also on the Atlantic coast, the large wine-drinking States are decreasing, with extreme lows for New York (-47%) and Virginia (-16%). Though inland

States like Illinois (-46%), Michigan (-51%) and Pennsylvania (-58%) haven't done any better.

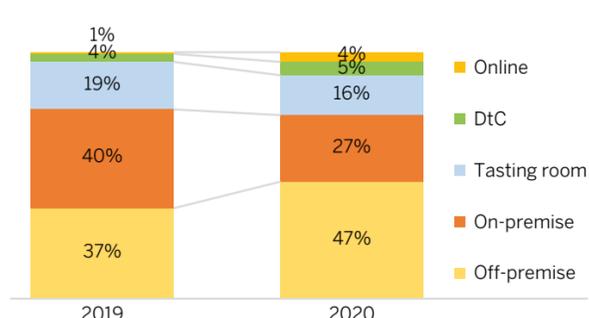
In the face of this disruption, the question now is when will the food service sector return to pre-crisis levels? It's difficult to give a definite answer, but according to a recent survey by Nielsen, most Americans say they will be able to return to restaurant tables when they are vaccinated (43%) and/or when the pandemic is finally eradicated (40%). Added to these a further 1/5 are undecided.

If, however, we narrow the field down to those who still haven't set foot in a restaurant, most reasons indicate a lack of safety (60%), linked to another 54% of answers on the unsuitability of restaurants (distancing, sanitization etc). We mustn't underestimate the opinions of those who have lost their jobs and can't afford an evening out (15%).

1. Wine sales by channels: % change 2020/19



2. Wine sales: share % by channel



An elaboration by Corriere Vinicolo from data by Nielsen US and others

ALARM BELLS FOR THE WINE WORLD FROM THE SECTION ON ALCOHOL OF EUROPE'S BEATING CANCER PLAN

EUROPEAN UNION An attack On Alcohol (And Wine), In The Name Of Health

FROM THE LATEST WINE INTELLIGENCE'S REPORT ON LOW- AND NO-ALCOHOL WINES



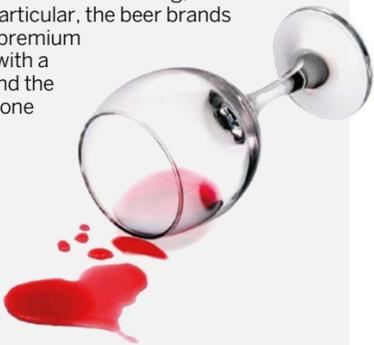
HEALTH, ALCOHOL AND MODERATION IN THE FUTURE CONSUMPTION

There is a growing movement towards moderation, particularly among younger consumers, creating a need for healthier options, more control, and, most importantly, a product that still tastes good. The latest Wine Intelligence report (Opportunities for Low and No-Alcohol Wine 2021) suggests that there is an unmet consumer need, that can be summarised in three words: health, control and taste. According to the report, we want to drink stuff that is better for us, be it in fewer calories, more 'natural' ingredients and fewer headaches. Also, we want to drink things that won't cause us to lose control, whether it is because we value this control for its own sake, or we just want to avoid being shamed on social media. Finally, we want drinks that taste pleasant and genuine to what they are.

For marketers and brand owners, this is a clear and tempting consumer target. And it will be leading in the beverage market for many decades. Moderating alcohol consumption is a clear lifestyle goal of those in the Generation Z and Millennial cohorts, and clearly not of interest to those over 55, according to the Wine Intelligence report. Considering the wine category, low and no-alcohol wine struggles to meet the benchmark of what wine should taste like. Individual winemakers are interested but it seems clear from the data that when a sufficient proportion of products in market fail the consumer taste test, it tarnishes the whole category.

There is also a problem of availability. Retailers are reluctant to invest heavily in promoting a product that requires a very specific need. This factor, according to the report, has been conspicuous by its enforced absence over the past 12 months, as pandemic has restricted both the opening hours of specialist retail, and the inclination of shoppers to engage with sales staff. For the low and no-alcohol wine category, Wine Intelligence points to another braking factor: the success that other alcoholic beverage categories are having in terms of convincing consumers that their low and no-alcohol product is more in tune with a moderating, healthier lifestyle. In particular, the beer brands that changed its core premium brand image aligning with a no-alcohol product. And the wine industry hasn't done that yet.

Other categories are working to meet the consumers' needs. The recent success of the hard seltzer category in the US and Canada, as Wine Intelligence wrote, is down to the category's positioning as "low calorie, low carb." Hard seltzer drinkers see the product as a light, low alcohol alternative to other drinks, even though a typical 330ml / 12oz can at 5% ABV contains almost as much alcohol as a 150ml glass of wine. Finally, according to Wine Intelligence, the low and no-alcohol wine category is a trend to watch and will be an interesting niche but not the main event in the wine category. Taking alcohol out of the equation will meet some needs, and those needs may grow over time, but for the foreseeable future most consumers will still choose standard wine most of the time and opt for moderation, that simply involves drinking smaller amounts and less often.



by GIULIO SOMMA

A phantom is wandering around the wine world. And not only in Europe, as the beginning of a famous nineteenth-century text goes, which we wanted to paraphrase. However, it's a phantom that comes from Europe. The attack on alcohol in general and, indirectly on wine, is propelled by the content and formulation of the beating cancer Plan drawn up by the European Commission, in which alcohol is charged, alongside smoking and pollution, as one of the causes of an illness that affects millions of people: cancer. The problem that derives from this demonization of alcohol is not just European, but affects the wine industry of all continents, not only because it comes from one of the most important markets in the world (the European Union produces 60% of wine and consumes over 50%), but also because it is determined by a stance taken by the World Health Organization (WHO) and, lastly, because the relationship between health and wine (in the context of promoting responsible and moderate drinking) is a subject with a global importance today. The subject of drinking responsibly is emerging clearly among the conscience of consumers, who, according to the latest Wine Intelligence study (see WI box), are increasing their interest in moderate consumption on all markets compared to the past, drinking smaller quantities of alcohol and less frequently. This trend, according to the report, is developing among the younger generations including the Z generation of Millennials.

The European Beating Cancer Plan is a vast programme with 4 billion euros of funding. It in-

tervenes to mitigate the effects of cancer within the project called "European Health Union," strongly pursued by the current president of the European Commission, **Ursula von der Leyen**, and whose application has been accelerated by the Covid-19 pandemic. What has been illustrated by the Directorate-General for Health and presented by the European Commissioner for Health, **Stella Kiriakides**, is a series of actions that particularly investigate smoking, pollution and excessive alcohol consumption. For this latter, in particular, a review of labelling rules has been announced, as well as taxation and communication and promotion policies of products. The reasons that have driven Europe to intervene can be better understood if we look at the figures. In 2020, there were 2.7 million cases of cancer diagnosed within the 27 E.U. countries, with 1.3 million certified deaths. The problem is particularly felt by the Commission, if we consider that Europe represents 10% of the world's population but unfortunately counts for 25% of total cancer cases. And the forecasts for 2035 are not looking rosy: according to recent estimates of the European Cancer Information System (ECIS), cases are destined to increase by 24%, making this illness the first cause of death. Treatment for cancer costs Europe 100 billion euros each year. And the Covid-19 pandemic, proclaimed by the World Health Organisation in March 2020, has had a strong impact on European health, slowing down and sometimes halting prevention, diagnosis and treatment. In short, Europe intends to create a European anti-cancer centre to coordinate scientific research, to strengthen ECIS (European Cancer Information

▼ Ursula von der Leyen



▼ Stella Kiriakides



Together with smoking and atmospheric pollution, harmful alcohol consumption is indicated as one of the main causes of the spread of cancer. The E.U. Plan intervenes on compulsory labelling, taxation and, possibly, the promotion of alcoholic drinks (including wine). Both the supply chain and European politics are up in arms. "We will fight abuse but no demonization," said Jean-Marie Barillère, president of the Comité Vins, Domenico Zonin, vice president, and Sandro Sartor, president of Wine in Moderation. And while a Wine Intelligence study highlights consumers' growing attention to moderation and alcohol, scientific research, in the testimony of Prof. Ramon Estruch, (Barcelona University) and Nicolai Worm (German University), and in the factsheet drawn up by the Comité Vins, confirms that drinking wine in moderation is not harmful

◆ System), to launch phone apps for prevention and screening, to review laws on tobacco products (to reduce the population using them to below 5% by 2040), to give better information about diet in schools, to intervene in the consumption of red and processed meat (especially cured meats), to encourage a sustainable urban mobility plan to reduce sources of air pollution and to reduce exposure of personnel to workplaces dealing with substances considered high risk. As for alcohol, the aim of Brussels is to reduce harmful alcohol consumption by 10% by 2025, in line with the United Nations' sustainable development policies.

For wine, which risks being labelled as a toxic substance just because it contains alcohol, this new scenario seems to foreshadow a real frontal attack. This is raising strong concerns throughout the industry, which is well aware of the harm caused by excessive alcohol consumption and has long been recommending that consumers all over the world follow a responsible lifestyle, as Sandro Sartor explains, president of the association Wine in Moderation, a movement that brings together various associations of the sector in 17 countries, for the promotion of drinking in moderation.

"The problem of the relationship between alcohol and health should shift to the use and ways of drinking," said Mr. Sartor. "For example, in the case of the Mediterranean diet (UNESCO heritage) a moderate use of wine is completely compatible with a healthy diet and does not appear to increase the risk of cancer. This is confirmed by a lot of scientific evidence available and accessible to everyone."

▼ Sandro Sartor



▼ Jean-Marie Barillère



▼ Domenico Zonin



Wine, Health, Cancer and Politics. The Floor to Science

An interview with Professor Ramon Estruch, senior consultant at the Hospital Clinic at the University of Barcelona



The European Commission again points out alcohol as a major cause of cancer with no distinction according to the type of alcoholic drink and the way alcohol is consumed. How do you explain this indiscriminated attack?

The world has been consuming alcohol for more than 9,000 years. According to the "National Geographic Magazine", rice wine has been consumed for at least 9,000 years according to chemical evidence found in a jar of that age. It is hard to believe that a substance with which we have lived for thousands of years is so harmful. But the most serious thing is that we have plentiful scientific evidence on the benefits of moderate alcohol consumption on health. In this context, it is difficult to understand the attacks by politicians from the public health departments, and some researchers, on moderate alcohol consumption (mainly wine and beer).

Where do you think this attack against all kinds of alcohol originated?

First, once the campaign against tobacco is over, many have wanted to find a new enemy for society. As alcohol consumed in excess is harmful to health, they decided to simplify the message and consider that any alcohol at any dose is harmful. Too many think that human beings are incapable of understanding messages that go beyond "good or bad", "friend or foe," when life has plenty of "nuances." Secondly, since sugar is probably much more harmful than alcohol on health. The powerful food industry connected to sugar, especially sweeter beverages, wanted to divert the attention of politicians and administrations to another point, the alcohol industry.

Is there an evidence, based on scientific data, that justifies such an assessment? In particular, has it been proved that a moderate consumption of alcohol is a cancer risk factor?

We have a vast amount of scientific evidence that indicates that moderate alcohol consumption protects against cardiovascular diseases. There is also numerous evidence that moderate consumption of alcohol in general, and wine

in particular, reduces overall mortality (all-cause mortality), which is the main parameter to assess in individual and public health. However, the relationship between alcohol and cancer is more delicate, as there are many confounding factors that blur this relationship, especially studies with breast cancer in women.

Where does the problem lie?

The Trump's administration in the USA prevented the development of the MATCH15 randomized study, which would have provided an answer to this and other aspects related to the beneficial or toxic effects of moderate alcohol consumption. In the absence of randomized clinical trials, the recommendations for alcohol consumption are based on the results of epidemiological studies in which many confounders involved in the alcohol-cancer relationship must be controlled very closely. That said, the most important is the dose of alcohol consumed per day. Moderate consumption should be different for men (up to two-three drinks a day - 30 g/d) and women (up to one drink a day - 15 g/d). Part of the apparent increased risk of cancer among light-moderate drinkers may be substantially due to under-reporting of intake. Bad registration of the actual consumption of alcoholic beverages, especially in women. Several subjects report fewer doses than they actually drink. Another important point is the pattern of alcohol consumption. It is not the same to consume a glass of wine a day (7 glasses a week) than 7 glasses in a single day - weekend). Binge drinking is associated with a higher incidence of cancer. Many studies do not differentiate between the consumption pattern and the conclusions may be wrong. It is also important to consider whether it is drunk with or without meals, as well as the dietary pattern.

The effects are different if you eat a healthy diet (Mediterranean diet), with an adequate intake of vitamins (folic acid) than if it is not. We can go from "protection" to "induction." Finally, other lifestyle factors such as smoking (cancer induction) and physical exercise (protection) are also important.

**Note: In epidemiology, confounding factors are variables able to generate an apparent association (positive confounding), or to mask a relationship existing in reality (negative confounding) between some exposition and an illness or some clinical results.*

Have these factors been taken into account?

In most of the studies carried out these factors have not been taken into account, so it cannot be concluded that there is a cause-effect relationship between moderate consumption of alcoholic beverages (especially wine) and cancer.

Are there, according to scientific data, different thresholds of "moderate consumption" for beer, wine, and spirits? If yes, what are they?

As the main toxic component of alcoholic beverages is alcohol (ethanol), the consumption threshold is based on the amount of alcohol. The limits are up to 3 drinks a day (30 g/d) for men, and up to 1-2 drinks a day (15 g/d) for women, independently from the type of alcoholic beverage consumed.

As far as the risk of cancer is at stake, are there any differences, based on scientific data, according to the way of consumption (e.g. drinking with meals or between meals)?

As explained before, it is very important in the relationship between alcohol and cancer whether the alcoholic beverage is consumed or not with meals, but is also important the dietary quality of the meals. Mediterranean diet protects against cancer.

Are there scientific data that can evidence a difference of effects on health according to the type of alcoholic drink, for example between wine and spirits?

There are relatively few studies that differentiate the effects of the three types of alcoholic beverages (wine, beer and spirits) on cancer, but those that exist indicate that fermented beverages, especially wine, have a greater protective effect, mainly due to the non-alcoholic content, mainly polyphenols (resveratrol and others).

Professor Ramon Estruch, senior consultant at the Hospital Clinic of Barcelona University, also explains this very clearly in an interview (see here below), where he points out that "Moderate consumption of alcohol in general, and especially of wine, reduces the overall death rate, which is the main parameter for evaluating individual and public health." Professor Estruch highlighted the more complex relationship between alcohol and cancer as depending on various factors including, for instance, alcohol consumption models and lifestyles that studies don't always take into due consideration (as pointed out by Professor Nicolai Worm, see page 10).

On a European level, the CEEV-Comité Vins, the largest trade association that brings together 23 associations from 11 countries and represents 90% of the old continent's wine exports, has taken a stand through its president Jean-Marie Barillère, explaining that industrialists share the objective of the Commission to reduce the harmful use of alcohol, but has also observed how in the last 12 years there has been a very strong effort to promote responsible wine drinking, through the Wine in Moderation movement. The vice president of CEEV, Domenico Zonin, defines the relationship between wine and health as one of the most important subjects for future years, in

the future of all the world's wine industries.

"But on this subject, the wine supply chain will have to make a quick gear change, a leap of quality," Mr. Zonin warned. "The sector will have to find important budgets to ensure they can produce reliable studies, with a sound scientific basis, verified and concrete, to present at round tables on a political level and to implement suitable media communication."

The current scenario is a very delicate one which, according to vice president Zonin, imposes urgent investments in communication activities towards the consumer, and to raise awareness of the production base and to contrast a dangerous situation regarding wine. A warning that is valid for Europe as well as for other continents.

"We must be less hesitant," he said. "We must lobby and make sure the whole supply chain starts moving in a more determined manner. As we can see, things are changing quickly in Europe. Therefore, Italy is carrying out an important role in stimulating the Board of CEEV and the whole European wine world. We have to pay close attention to the demonization of wine, in order to avoid being caught by surprise and unprepared. The context has changed and the action strategy must soon change to this new situation." ◆◆

ATTACK BY PROF NICOLAI WORM (GERMAN UNIVERSITY) IN AN INTERVIEW WITH THE DRINK BUSINESS

WHO: ALCOHOL, NOT ENOUGH SCIENCE AND TOO MUCH POLITICS

On the subject of alcohol, the World Health Organization is providing misleading and deceptive information. Nicolai Worm, professor at the German University of Prevention and Health Management and president of the Wine Information Council (a scientific organisation promoted by **Wine in Moderation – Art de Vivre programme**) has taken a very strong stance, and raised much controversy. In an interview with the specialised magazine "The Drink Business," Professor Worm underlined how WHO is encouraging governments to impose measures to limit alcohol consumption, but it is not making the due difference between the type and quantity of alcohol or with respect to its nutritional aspects. Under accusation, according to the expert, is the message according to which alcohol should be completely avoided so

▼ Nicolai Worm



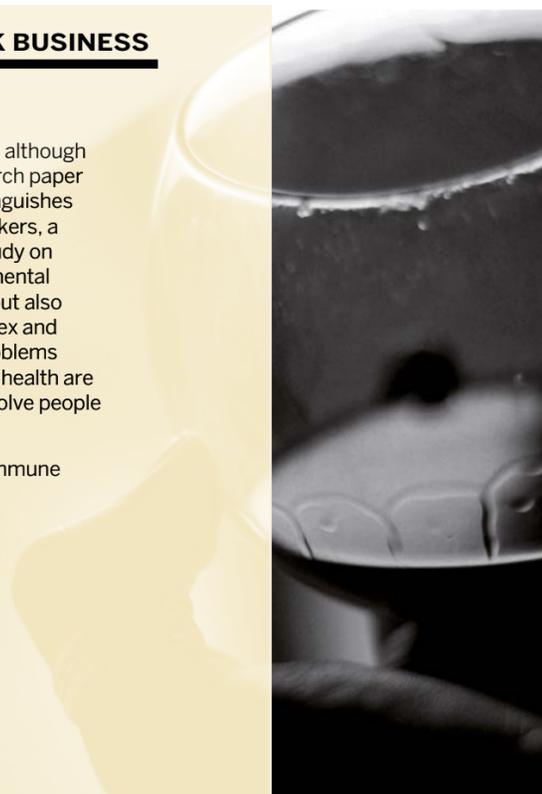
as to not weaken the immune system, in relation to exposure to Coronavirus. A theory not backed up by scientific evidence, neither are the claims, Worm points out, contained in the nutritional information sheets of the WHO in recent decades.

With regard to this, Professor Worm quotes a study from February 2016 (with the title "Opposing effects of alcohol on the immune system") which demonstrates how moderate alcohol consumption is associated with reduced inflammation and better response to vaccination. Moreover, light or moderate drinkers have a lower risk

of death from all causes compared to non-drinkers, although heavy drinkers are at higher risk. The quoted research paper is important, the expert points out, because it distinguishes between moderate drinkers and chronic heavy drinkers, a distinction that is rarely made. For any scientific study on alcohol, Worm explains in the interview, it is fundamental to consider not only the quantity of alcohol drunk, but also the consumption model and the type of drink, the sex and nutritional state of the person, as well as genes. Problems regarding the final results of studies on alcohol and health are mostly due to the fact that these studies mainly involve people with alcohol use disorders.

"The vast majority of research on alcohol and the immune function is done on individuals who are chronic heavy drinkers," Professor Worm underlined.

Lastly, another scientific study quoted by the German expert, named "Impact of Alcohol Abuse on the Adaptive Immune System," has pointed out the "harmful effects of a strong exposure to alcohol," highlighting that "moderate alcohol consumption may have beneficial effects on the adaptive immune system, including better response to vaccination and infection."



▼ Herbert Dorfmann



▲ Margaritis Schinas



▲ Paolo De Castro

◆ Italy, the first wine-producing country in the world, which also became the first exporter in volume in 2020 compared to Spain and France, is working through the most important trade associations, with Unione Italiani Vini at the head, to make sure that the misleading concept doesn't get through that drinking alcohol is harmful regardless of the quantity and type of drink. Moreover, the whole supply chain is doing a delicate voluntary job on labelling, which should allow them to indicate the main nutritional information (calories and ingredients) on wine labels to guarantee consumers the utmost clarity and transparency. Therefore, after this outcry following the presentation of the E.U.'s Beating Cancer Plan, the troubled waters seemed to have grown calm. Even if the battle, as is easy to foresee, will shift from a political to a scientific plan. The good news for now is that the European Beating Cancer Plan is not considered untouchable. The stance of some Members of the European Parliament, including **Paolo De Castro** and **Herbert Dorfmann**, has somehow managed to allay concerns, because the proposals drawn up in Brussels by the European Commission and the Directorate-General for Health will need to be discussed with both the European Council and the Parliament.

"In those seats, it will be possible to intervene in a timely fashion and in the right way," Mr. De Castro explained. "It will be possible to intervene in a timely fashion and in the right way, avoid-

ing getting carried away with hasty conclusions on the future of the wine sector."

Some signs of easing the tension arrived after the Plan was partly revised.

"Compared to the first version of the E.U.'s Beating Cancer Plan in which there was a kind of demonization of alcohol," Sandro Sartor, the president of Wine in Moderation recalled. "Now there is talk of harmful use of the product. It is a great result for wine, because Europe's position is no longer that alcohol is harmful to health, but an excessive consumption of alcohol is harmful."

And the vice president of the E.U. Commission, **Margaritis Schinas**, has also tried to reassure the wine sector on one point.

"The European Union does not aim to punish or prohibit wine, let alone label it as a toxic substance," he said.

However, it seems clear that worrying signs are coming from Europe that don't let the wine world sleep well at night. A hasty and simplistic conclusion on the subject of the relationship between wine and health could lead to very risky consequences for a growing sector, which represents one of the most important items in the agroalimentary balance sheet, not only in Europe. It is a sector that will have to watch its back very carefully, on a European as well as a global level, if it wants to assert its rights in line with the principles of correct, modern and responsible consumption, in order to safeguard its specificity, as well as its social and cultural value.

WHAT THE E.U. PLAN ENTAILS

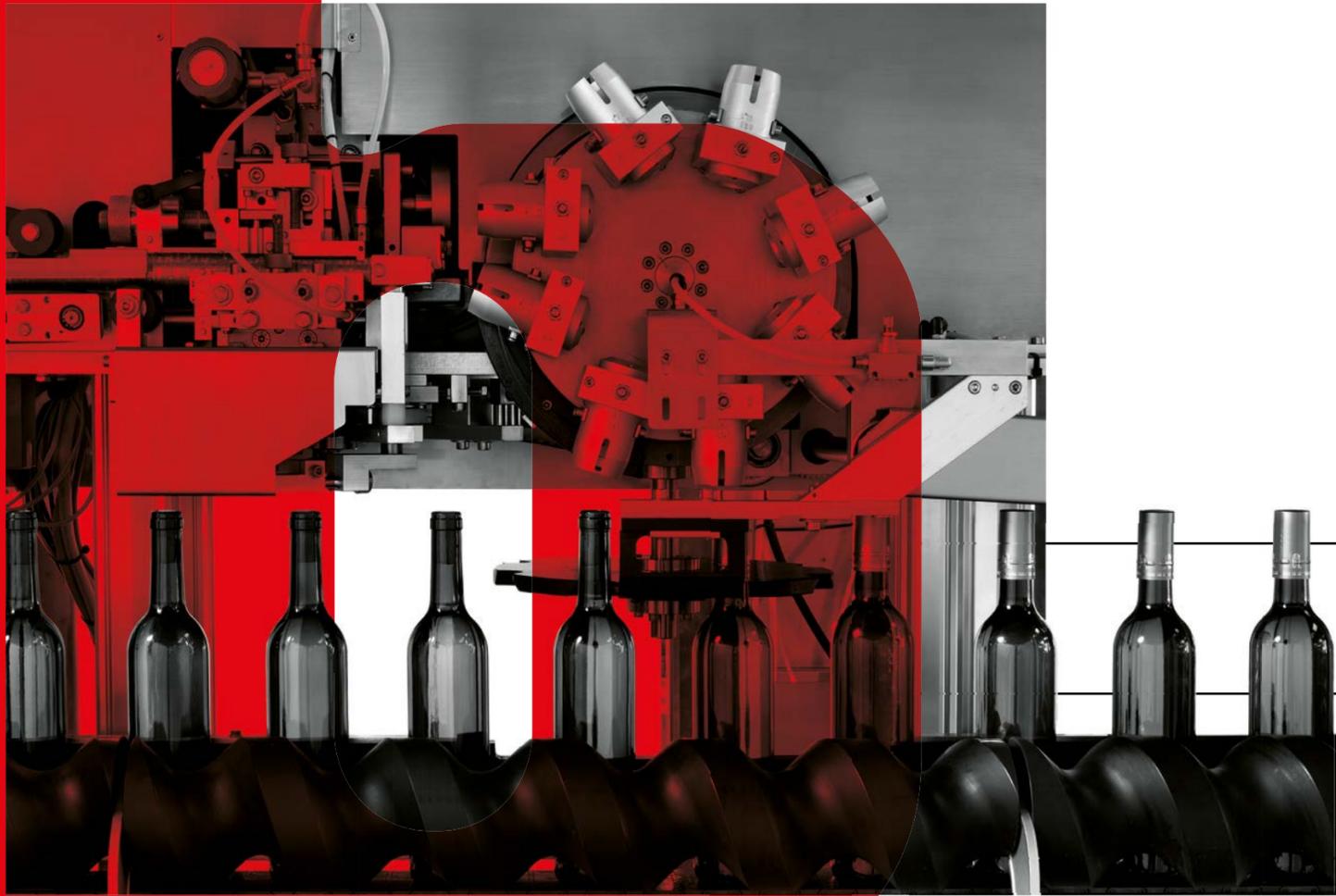
REDUCING HARMFUL ALCOHOL CONSUMPTION

Alcohol-related harm is a major public health concern in the E.U.. In 2016, cancer was the leading cause of alcohol-attributable deaths with a share of 29%, followed by liver cirrhosis (20%), cardiovascular diseases (19%) and injuries (18%). The Commission will increase support for Member States and stakeholders to implement best practices and capacity-building activities to reduce harmful alcohol consumption in line with the targets of the UN Sustainable Development Goals. This includes a target to achieve a relative reduction of at least 10% in the harmful use of alcohol by 2025. In addition, the Commission will review E.U. legislation on the taxation of alcohol and on cross-border purchases of alcohol by private individuals, ensuring that it remains fit for purpose to balance the objectives of public revenue and health protection. To reduce the exposure of young people to alcohol marketing, the Commission will closely monitor the implementation of the Audiovisual Media Service Directive provisions on commercial communications for alcoholic beverages, including on online video-sharing platforms. This will involve work with Member States and the European Regulators Group for Audiovisual Media Services (ERGA) and stakeholders to encourage self and co-regulatory initiatives.

Furthermore, the Commission will review its promotion policy on alcoholic beverages and in addition propose a mandatory indication of the list of ingredients and the nutrition declaration on alcoholic beverage labels before the end of 2022 and of health warnings on labels before the end 2023. Support will also be provided to Member States to implement evidence-based brief interventions on alcohol in primary healthcare, the workplace and social services.



**European
Commission**



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All You Need To Know ABOUT WINE AND HEALTH

Science has long clarified what we know in terms of the relation between a healthy lifestyle and cancer. Wine is part of this, as much as of the Mediterranean diet. Now the Wine Information Council explains how

In the context of a Mediterranean diet and in the context of a healthy lifestyle, light to moderate wine consumption does not lead to an increased risk of cancer. Indeed, it can contribute to a better life expectancy and a lower incidence of major diseases such as cardiovascular disease, diabetes and cancer. To support this thesis, scientific data is needed and, for this reason, the studies collected in the database of the **Wine Information Council** (partnership between the various scientific, academic bodies and experts in the Europe and beyond devoted to research on wine, health social aspects, and the organizations committed to the promotion of moderation and responsibility in the consumption of wines) represent the **most up-to-date repository on the health effects of wine consumption**. The documents and the factsheet are public and can be consulted here (<https://www.wineinformationcouncil.eu/>). Below, we propose a summary.

Are Alcoholic Beverages And Wine A Risk Factor For Cancer?

Cancers are a multifactorial disease and it is increasingly accepted that certain lifestyle choices can affect the risk of developing cancer. Besides several unmodifiable risk factors (such as age, sex, ethnicity and genetic disposition) which may contribute to an increased risk for most cancers, improvement of lifestyle habits may contribute to a reduced risk of cancer. According to World Health Organisation (Who), and the World Cancer Research Fund (Wcrf 2018), one third of the cancers could be prevented by adopting a healthy lifestyle (such as avoiding smoking, maintaining a normal body weight, being physically active, avoiding excessive consumption of alcoholic beverages and keeping a healthy dietary pattern). In addition, a study performed by the Harvard University further suggested that moderate consumption of alcoholic beverages is one of the five healthy lifestyle factors that reduce the risk of death from all causes, including cancer (Li et al 2018), where the number of low-risk behaviours adopted was inversely related to the risk for mortality.

Furthermore, the **Mediterranean Diet** (Med Diet) is considered as one of the healthiest diets in the world by the Who, that notes that it is directly associated with a lower rate of mortality thanks to its effects on disease prevention (Who Europe 2018). The moderate consumption of alcoholic beverages, particularly **wine**, is an important component of that diet. So, recommendations for a "healthy" lifestyle which include a healthy diet and avoidance of alcohol, may be confusing, at least from the Med Diet perspective. Both, the International Agency for Research on Cancer (Iarc) and the Wcrf report that alcohol consumption is associated with an increased risk for certain cancers (Wcrf 2018, Iarc 2012). **Risk is elevated with heavier drinking for all alcohol-associated cancers**, with the exception of breast cancer. In this context, the risk of developing cancer involves various risk factors and all cancers that have been associated with alcohol also occur in the absence of drinking. Some population studies suggested that any consumption of an alcoholic beverage is harmful to health, because of increased cancer risk, regardless of the amount consumed and without assessing the pattern of consumption, the type of alcoholic beverage and other lifestyle factors (Gakidou et Gbd collaborators 2018, Wood et al 2018). These authors concluded that it would be best for our overall health to avoid drinking at all, despite the fact that a reduced risk of myocardial infarction and of all-cause mortality was found, and that cardiovascular diseases are the number one cause of death globally (Who 2017). Can we still enjoy a glass of wine with the meal without jeopardizing our health? What does the scientific evidence say regarding a possible cancer risk when wine is consumed moderately within the context ("umbrella") of a healthy lifestyle and a Mediterranean-style diet?

Scientific Evidence

The chemical substance **ethanol** (also ethyl-alcohol or alcohol) has been classified as a Group 1 carcinogen by the International Agency for Research on Cancer (Iarc 1988). This classification is given to agents or exposures where the agency considers there to be sufficient evidence of its carcinogenic effects in humans. Two **enzymes** primarily in the liver (alcohol dehydrogenase, Adh, and aldehyde dehydrogenase, Aldh) are involved in breaking down alcohol to enable the body to eliminate it. In the first step, Adh metabolises alcohol into acetaldehyde, which is a highly toxic chemical substance and known carcinogen. Then in a second step, acetaldehyde is further metabolised by Aldh to another, less active metabolite called acetate, which is then further broken down into water and carbon dioxide for elimination from the body. The damage that **acetaldehyde** can cause to the cells in the body depends on how quickly it is broken down in the first step into acetate

(Stockley et al 2010). Therefore, the faster an individual consumes an alcoholic beverage, the higher the body alcohol concentration will rise with the respective negative health consequences.

Cancer is a term used for a certain group of diseases in which abnormal cells divide without control and invade other body tissues and organs. There are more than 100 different types of cancers. Several observational studies and meta-analyses, however, have also found a reduced incidence for certain cancers associated with light to moderate alcohol consumption. The mechanism by which this alcohol consumption may decrease the risks of some cancers is not completely understood and may be indirect and/or alcoholic beverage specific through anti-oxidant and anti-inflammatory effects.

Excessive Consumption Of Alcoholic Beverages And Cancer Risk

Alcoholic beverages do not cause or contribute to the cause of all cancers. The association between the consumption of alcoholic beverages and the risk of certain cancers has been studied for several decades. These studies have found that the extent to which alcoholic beverages are a risk factor of a cancer depends significantly on the **amount** of alcohol consumed, the **type of alcoholic beverage** and **how** it is consumed, that is the pattern of consumption, and probably also the dietary pattern in which alcohol is consumed. Consumption levels and drinking patterns vary greatly between cultures and societies, however, and large amounts of an alcoholic beverage as well as regular heavy and binge drinking patterns generally impact on an individual's general health and welfare.

Excessive consumption of alcoholic beverages is a risk factor for certain types of cancer and the risk generally increases with increasing levels of consumption. For example, there is evidence that regular heavy **excessive consumption of alcoholic beverages and binge drinking patterns** (Roerecke et al 2014) are associated with increased morbidity and mortality from certain can-

cers (Bagnardi et al 2015), and particularly cancers of the upper aero-digestive tract (Pelucchi et al 2011). This increased risk is especially seen among individuals who also smoke tobacco (Anantharaman et al 2011, Szymariska et al 2011). Alcohol and tobacco enhance each other's effects (i.e. act synergistically) on the risk of cancers of the upper digestive and respiratory tract. Cancer of the liver can result from alcoholic liver cirrhosis, related to long-term heavy drinking (Parry et al 2011, White et al 2017; Jin et al 2013, Xi et al 2017) in conjunction with an unhealthy diet and/or hepatitis C and B virus infection. Other malignancies shown to be associated with heavy drinking include colorectal cancer as well as female pre- and post-menopausal breast cancer (Iarc 2018). These cancers are referred to as alcohol-attributable cancers, and there is sufficient or convincing evidence of the attributions (World Cancer Research Fund International 2018). One of many meta-analyses relating the consumption of alcoholic beverages to all cancer mortality suggested, however, that for heavy drinkers (>50 g alcohol/day), the relative risk of dying from any cancer was increased by 32% (Jin et al 2013). **There is no doubt that excessive drinkers have a high risk to develop cancer.**

Moderate Consumption Of Alcoholic Beverages And Cancer Risk

While existing research is largely consistent as to the harms of heavy/excessive drinking in terms of both cancer risk and overall mortality, there are disparate messages regarding the safety of light to moderate consumption of alcoholic beverages. Some argue that there is 'no safe limit of alcohol', mainly on the basis of an increased cancer risk (Wood et al 2018), and others emphasize the potential benefits for reducing cardiovascular mortality (Xi et al 2017). Although excessive consumption has been linked to increased risk of several types of cancer, the overall **effect of light to moderate consumption of alcoholic beverages** on cancer incidence is less clear and findings are inconsistent (Zhou et al 2016). Whereas some





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Cancer As A Multifactorial Disease

Since cancer is a multifactorial disease, **the cancer risk cannot be evaluated in isolation**, and studies suggest that lifestyle factors are important risk factors for cancer (Kerr et al 2017). Accordingly, the consumption of alcoholic beverages cannot be accurately evaluated in isolation from the other risk factors. For example, when the risk from alcohol is assessed within the context of a **balanced diet and a healthy lifestyle**, the results seem to be very different. The balance between genetic predisposition and environmental factors, including nutritional components and lifestyle behaviours, determines individual susceptibility to develop cancer (Khan 2010). Smoking (30%), obesity (20%) and infections (15%) appear to account for a large proportion, while physical inactivity, an unhealthy diet and occupational hazards contribute 5% each, where **the excessive consumption of alcoholic beverages contributes 3% to the overall cancer incidence** (Arteaga et al 2014).

Wine Consumption As Part Of The Mediterranean Diet

Long-term observational studies have also found differences between the alcoholic beverages. At low to moderate wine consumption, often no association with alcohol-related cancer types was observed. Especially when the risk was assessed in the context of other lifestyle factors, light to moderate wine consumption does not seem to be related to any increased cancer (and other disease) risk (Schwingshackl et al 2017, Li et al 2020). The Med Diet, which includes moderate consumption of wine, is considered as one of the healthiest dietary patterns in the world by the Who, noting that it is directly associated with a lower rate of mortality due to its effects on chronic disease prevention (Who Europe 2018).

The Med Diet

1. high intake of plant-based foods,
2. especially whole grain products
3. fruits, vegetables, nuts, legumes,
4. regular intake fish and seafood
5. high intake of cereals, mainly whole grains
6. fat is predominantly in form of extra virgin olive oil
7. moderate intake of fish and poultry (white meat)
8. moderate consumption of alcohol, preferably wine with meals
9. low amounts of dairy products and eggs as well as red meat and processed meat

Mediterranean Drinking Pattern

The Mediterranean drinking pattern is not only about the amount of alcoholic beverage consumed but also the type of alcoholic beverage predominantly consumed – wine – and how it is consumed. Drinking patterns in terms of frequency and the amount of wine consumed as well as drinking with or without a meal are important influencing factors for the biological effects of this alcoholic beverage. Risky and harmful drinking patterns including the **regular consumption** of heavy amounts of wine, as well as consuming heavy and excessive amounts on a single occasion (**binge drinking**), should be discouraged. It is thus recommended that individuals drink wine as an accompaniment to food and alternate it with a non-alcoholic beverage such as water (Boban et al 2016). Spanish researchers examined the drinking patterns and concluded that the traditional Mediterranean drinking habits (such as moderate intake of alcoholic beverages, alcohol intake spread over the week, low spirit consumption, a preference for wine, wine consumed during meals, and avoidance of binge drinking) were also associated with a lower risk of all-cause mortality (Gea et al 2014).

Low To Moderate Wine Consumption As Part Of A Balanced Diet Such As The Med Diet

Intake of individual foods has been extensively studied in relation to cancer risk and for the chemical substance ethanol, a convincing evidence has been established, particularly for breast cancer (Iarc 2012, Wcrf 2018). However, individuals do not consume isolated foods or nutrients and examining dietary patterns in relation to cancer risk is consequently more meaningful. Thus, it should be emphasized that **the effect of alcohol on the tumour development depends on the context**. Diet has been identified as a modifiable lifestyle component that influences cancer development. And the Med Diet is considered **one of the healthiest diets** because of its abundance of plant-based foods and the lack of processed foods (Willett et al 1995).

Numerous epidemiological studies (Pellucchi et al 2009, Eleftheriou et al 2018, Soltani et al 2019) have focused on the health effects of the Med Diet, where studies that have examined **the role of wine in the Mediterranean diet** have identified a decreased risk of multiple health outcomes. More adherence to a Mediterranean

dietary pattern resulted in: **a reduced risk of all-cause mortality**, cardiovascular diseases, coronary heart disease, stroke, overall cancer, diabetes and neuro-degenerative incidence (Dinu et al 2018, Soltani et al 2019).

When examining moderate wine consumption in the context of the Mediterranean diet and typically with the meals, no increased cancer risk, even for breast cancer and colorectal cancer (Schwingshackl et al 2017, Toledo et al 2015) was observed. Furthermore, a better adherence to the Med Diet was also associated with a lower risk total mortality, that is dying from any cause (Soltani et al 2019). Regarding the **alcohol**, as stated by Schwingshackl et al. (2017), the attribution of **anti-cancer effects** to its consumption seems **controversial**, considering that it is categorized by the Iarc as a Group 1 carcinogen for humans and by the World Cancer Research Fund as a convincing carcinogen for mouth, pharynx, larynx, esophagus, stomach, liver, colorectal, and breast malignancies (Wcrf 2018). Low-to-moderate wine consumption contributes, however, to a higher Med Diet adherence and no dose-response effect of the toxicity of alcohol or wine consumption can be inferred from their conclusions.

Wine In The Med Diet

The inclusion of alcohol in the Med Diet usually means moderate wine consumption as part of a meal (Gea et al 2014). When analysing the components of the Med Diet that contributed most to such a decreased cancer risk, researchers have specifically identified the moderate, but not excessive consumption of alcoholic beverages and predominantly wine, fruits, vegetables and whole grains as protective components (Schwingshackl et al 2017, Eleftheriou et al 2018). There is sufficient clinical evidence to point out that **moderate wine drinkers have a lower risk for cancer compared to drinkers of other alcoholic beverages**. So far, the anti-cancer effects of wine-specific **polyphenols** have only been observed in animal and laboratory studies. In some epidemiological studies, however, the risk of cancer has been shown to be lower in wine drinkers than in those who consumed other alcoholic beverages (Xu et al 2019, Groenbaek M et al 2000). The observed positive health effects of light to moderate wine consumption may be – at least in part – linked to the protective effects of specific bioactive ingredients in the wine (Eleftheriou et al 2018).

Moderate Wine Consumption.

Cancer Risk And A Healthy Lifestyle

Several studies, according to the Wine Information Council, confirm that adopting a healthy lifestyle and a balanced diet, including a moderate consumption of wine/alcoholic beverages, has a number of positive and protective health effects. A study from Harvard University examined how multiple lifestyle factors relate to life expectancy without major diseases and confirmed these recommendations: following a healthy lifestyle at mid-life is **associated with a longer life expectancy** and a lower risk of major diseases such as cancer, cardiovascular and diabetes. The study highlights five specific lifestyle factors, one of them is the moderate consumption of alcoholic beverages (Li et al 2020):

1. never smoking
2. normal body weight (Bmi 18.5 - 24.9)
3. moderate to vigorous physical activity
4. moderate consumption of alcoholic beverages (women 5-15g/day, men 15-30g/day)
5. balanced diet

In the context of a healthy lifestyle, moderate wine/alcohol consumption is one lifestyle factor that contributes to a longer life expectancy free of major diseases (Li et al 2020). One of the five lifestyle factors – a moderate amount of alcoholic beverages – was defined for **women 5-15 g of alcohol/day or the equivalent of 50 to 150 ml of wine and for men, 5-30 g of alcohol/day or the equivalent of 50 to 300 ml of wine**.

A recent large European study reported similar results (Nyberg et al 2020), where the higher the number of healthy lifestyle habits, the longer the lifespan without major chronic diseases (type 2 diabetes, coronary heart disease, stroke, cancer, asthma, chronic obstructive pulmonary disease, heart failure, dementia). The longest life span free of disease was observed among those participants with a normal weight (Bmi < 25) and two of the following lifestyle factors: never smoking, physical activity and moderate consumption of alcoholic beverages (1-14 drinks per week for women and 1-21 drinks per week for men). **Even the World Cancer Research Fund recently stated five lifestyle factors that contribute to a lower cancer risk** (Wcrf 2018), among them a healthy diet, including **moderate wine/alcoholic beverage consumption**.

studies have found a minimally increased or no increased risk of overall cancer (Xi et al 2017), others have found that even light and moderate drinking significantly contributes to an increased overall cancer risk (Bagnardi et al 2013, Bagnardi et al 2015, Cao et al 2015). **The overall cancer risk is difficult to evaluate** since cancer consists of various diseases, each having specific characteristics. Furthermore, some of the meta-analyses investigating the association between the consumption of alcoholic beverages and cancer risk have limitations that need to be considered when evaluating the cancer risk: they did not assess the different drinking patterns and types of alcoholic beverages in modifying the effect of the total amount of alcohol (Bagnardi et al 2015); in addition, underreporting of alcohol consumption may partly or largely explain the cancer risk with light drinking (Klatsky et al 2014).

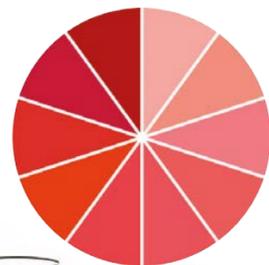
The J curve

A large prospective study found a J-shaped association between alcohol and mortality when examining the lifetime alcohol consumption in older adults, which remained after adjusting for the cancer risk. The lowest combined risk of death and cancer was observed for light alcohol intakes (between 1 and 5 drinks/week) in both men and women (Kunzmann et al 2018). An assessment of risk for all cancer types by pooling the results of several epidemiological studies in a meta-analysis found a J-shaped curve between light to moderate drinking and overall cancer risk. This translated into a **9% lower risk of developing cancer for light drinkers (<12.5 g alcohol/day)** compared to abstainers, but an increased risk for excessive drinkers. No increased risk of dying from cancer for moderate drinkers (1-3 drinks/day) compared to abstainers (Jin et al 2013). A large meta-analysis reached similar conclusions that the consumption of alcoholic beverages (up to 1 drink/day) was not associated with the risk of most of the common cancers, except for the relatively small increase in the incidence of breast cancer in women and colorectal cancer in men (Choi et al 2018).

OUR MAGAZINE'S "TOPIC OF THE YEAR" FOR 2021



PINK WINES. A Growing Sector Increasingly Beloved By Global Consumers



Pink, rosé, blush, still, sparkling, but also dessert wines: a growing family of wines which the World Wine Magazine will focus its attention on this year with a series of articles ranging from production techniques, in the vineyard and cellar, to product innovations and the market. Because "pink wines" are now a wine type that has reached maturity, becoming a phenomenon of an emerging market that is winning over consumers all over the world

Pink, rosé and blush, "pink" styles, still or bubbles with both the traditional and "cuvée close method," also dessert wines, monovarietals or blends and made with native varieties or otherwise: the world of "pink" wines is rich and varied. Although it doesn't represent the majority share of the world market it has certainly been the talk of the town in recent years. Starting from this fact, confirmed by the market, *Corriere Vinicolo* has decided to dedicate a specific in-depth analysis to the "third wine colour," making it the topic of the year for 2021 also for the World Wine Magazine. We decided on "Pink Project" for the title of this feature, on

the occasion of a special year that will be (must be) the year of rebirth, hope and a new "dawn," which has found its chosen colour in pink. Therefore, after *Corriere Vinicolo* chose "wine and wood" as "topic of the year" for 2019 and "Vineyard and Climate change" for 2020, the leitmotiv of our magazine for 2021 will be the "Pink project" as the "third wine colour", a project we are trying to explore through a series of investigations, interviews and in-depth technical analyses aimed at widening the still unexplored discussion and comparison, going from vine growers and entrepreneurs to researchers, politics to institutions right through to the supply chain of machines and products for viticulture and winemaking.

The questions we are starting from are the following. Can we confirm the definitive liberation of pink wines from the limbo in which they were created and have remained for decades as wines that are "neither white nor red"? Have they become a category to all intents and purposes on supermarket shelves and in the minds of consumers? Has the great success met by Provençal wines contributed to imposing pink wine on the main world markets as a wine type with its own features and defined identity? These questions will guide us in our investigations throughout 2021, keeping us busy with a series of reports on pink wines from all over the world. The multifaceted Italian sector will

certainly be one of the subjects under study, but Provence will also be investigated from the inside (beginning with this issue), as will the numerous and various consumption phenomena and international trends that impact on the whole wine world. If the main market on a global level, the United States, a while ago proclaimed the success of the "organic" phenomenon, now we can glimpse a new trend on the horizon to be quickly intercepted. This consumption trend is even more attentive to health and defined with the term "free," a concept from the food sector which, when applied to wine, means less alcohol, less sugar, less heavy. These are virtually the natural characteristics of "pink" wines, which are grow-

ing, as shown by Wine Intelligence data reported in Pierpaolo Penco's article. As always, our work gives space to key players in the wine world with interviews and reports in the territories, without forgetting the importance of data and an analytical reading of the emerging market phenomena. In 2021, we will be focusing on the problems and opportunities for pink wine in the world, starting with a subtle but important lexical distinction, especially for Italy. On an international level, in fact, "rosé" is unanimously recognised as a term for a wine category, playing around with "pink" on a marketing level doesn't cause any great problems of definition. In Italy, efforts are ongoing to converge on the general

"pink" wine type, so as to leave terms such as "rosato" and "rosé" (in the same way as the more traditional Cerasuolo and Chiaretto) the task of defining specific styles. It is a difficult but important commitment to describe Italian diversity, which is innate in the mission of a newspaper like *Corriere Vinicolo*, with over 90 years of history behind it and a level of international authority that has led to the creation of the World Wine Magazine today.

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LET US CALL ALL THE WINES THAT ARE NOT RED OR WHITE, "PINK WINES"!



Pink wines will include different production styles as well as their different territories and vine varieties. Pink will therefore be a general category, while rosé, Cerasuolo and Chiaretto will be specific, and different, production styles. What may seem a word play is actually a way to give each product a more exact definition. This is the project of the Istituto Rosautoctono, an institute that gathers producers located in areas where this type of wine traditionally comes from.

Outside of the Istituto Rosautoctono's producers,

wine makers have different agronomic and enological approaches, and such a clear distinction hasn't been made yet. Consumers can read the definition "pink" or "rosé" with no distinction. In the vast world of spumanti, distributed across the country, the most common term used is still "rosé."

Italian wines are as plentiful as difficult to communicate. This is the case for pink wines, whose labels are a little jungle where consumers might have a hard time getting oriented. We hope to offer you an insightful guide.



**RICHNESS OF TERROIR,
GRAPE VARIETIES AND WINE STYLE
BUT CONSUMERS...**

ITALIAN "PINK" WINE BETWEEN HISTORY, WINERIES AND MARKETS

The long tradition of native Italian pink and rosé wines coming together under the Istituto Rosautoctono (Native Pink Institute) and including the Chiaretto from Lake Garda, between Bardolino and Valtènesi, Cerasuolo in Abruzzo and "rosés" from Puglia and Calabria, meet the new phenomenon of Prosecco rosé. The unknown quantity of a still weak internal market and increasingly hardened global competition. The debate is on research and innovation in the vineyard and cellar for a new generation of wines able to win over the modern consumer today, without losing the strength of tradition and biodiversity

by FABIO CIARLA

Italy lives in a great gulf when it comes to pink wines. On the one hand, it is a great, historic producer, but at the same time, it doesn't drink much (less than 10% of wines drunk on a national level). How can such a phenomenon come about? First of all, as always when talking about Italian vine growing, it's important to know the historical background and traditions in the various territories. Also for pink wines, diversity is both a heritage and a difficulty for Italy, a kind of "biocultural" variety. But we won't be limiting ourselves to this. We will be carrying out an in-depth analysis, one of the first data collection projects on the entire production of pink wines in Italy. The aim is to identify the real extent of the phenomenon, its different aspects, weak points and unexpressed potential. From the first round of interviews with key players in the sector, the first weakness of the system that emerged was the lack of a specific observatory to provide statistics and useful data to producers, as well as the absence of a specific customs category, in fact pink wines currently come under the "red wine" category, thus preventing the automatic collection of data.

But, despite these gaps, how is the Italian pink wine system responding to the continuous growth in consumer demand? Basically, with a cultural movement and a process of production and marketing adjustment. The phenomena to keep under observation are the one linked to the creation of the *Rosautoctono*, the Institute of Native Italian Pink Wine, a second-level consortium that brings together the Protection Consortia of appellation pink wines produced with native varieties, and the one of Prosecco Rosé (which we discussed in the last issue of the magazine), a project that, as soon as it was set up, became part of a global context and promised to upset the apple cart for both sparkling and pink wines (and not just on an Italian level). The cultural heritage that drives *Rosautoctono* is also one that aims to identify the key to interpreting the phenomenon in the colour pink itself. Including "Chiaretto" wines from Lake Garda (Bardolino and



Valtènesi), Cerasuolo in Abruzzo and "rosé" wines from Puglia and Calabria. Different styles to maintain and propose as an asset on the market, which is currently dominated by the "Provençal style" of a light colour and approach. Research in the field and in the cellar is making progress and the production sector seems to have a new view of pink wine. They are no longer seen as useful wines for completing a range of products, but to be invested in and to develop specific projects, starting with abandoning practices not aimed at quality.

The Innovation

Having said this, the suitable innovation for renewing the whole category would seem to be Prosecco Rosé. It is a product called on to modify not only the Italian production features, but those of pink sparkling wines. With its 50 million bottles expected (10% of the total DOC), Prosecco Rosé is the candidate to become the absolute monopolist of the category, holding about 30% of the market that, at production, numbers about 160 million bottles on a global level. In fact, this is a wine that combines two consolidated tendencies and, especially thanks to the boom of Provençal wines in the USA, rosés have been finally freed from the image of a "by-product" of red wine and have created the category of "rosé wine consumers". Starting from 2015, thanks to Prosecco the world of sparkling wines has, in turn, begun a phenomenon of "democratisation" of the category, which historically had a top (Champagne) and a base (general sparkling wines and Cava), but no centre. A global phenomenon valued today at around 3 billion bottles (8% of total world wine) which has built up new consumers, widening its public and attracting mainly women and young people to wine consumption. As always, when there are points of convergence, the risks multiply too. In both cases, the strong concentration of markets seems to be the most worrying aspect: for rosés,



France, Germany, USA and UK make up 2/3 of world consumption, while for sparkling wine, USA, UK and Germany make up 40% of total global trade, with Germany and USA producers/consumers of a certain level and Italy, France and Spain monopolising exports. In practice, unlike red wine, which is an across-the-board product in the world and has opened new countries to consumption like India and China, rosé and sparkling wines are still markedly western products. Therefore, Prosecco Rosé will have to pay close attention to these market characteristics, despite its ability to break old patterns.

What is being asked, in fact, is mainly if - as all the Italian producers working in the category are hoping - Prosecco Rosé will attract new consumers to Italian pink wines or whether, and this is the risk, it will transfer just a part of the old Prosecco consumers towards the pink wine type. In reality, the first evidence seems to lead towards a deseasonalisation of consumption, the launch of the new wine type at the end of the year achieved moderate success in the face of consumption of Italian pink wines traditionally linked to summer.

Once again, a lot will depend on how people, whether they be producers or representatives of institutions at all levels, will know how to manage the situation. If the task of Rosautoctono is mainly to "pull together," it is understood that the same decision should be put into action at a national level to tackle, for instance, the problem of how to build the value of the "pink" wine supply chain through the management of controls, appellations and bulk wine. It is an already difficult road to undertake in consolidated categories, let alone in a new one still to be consolidated, as being in the field to be constructed could give way to a new approach linked to the creation of common strategies on a national system level.

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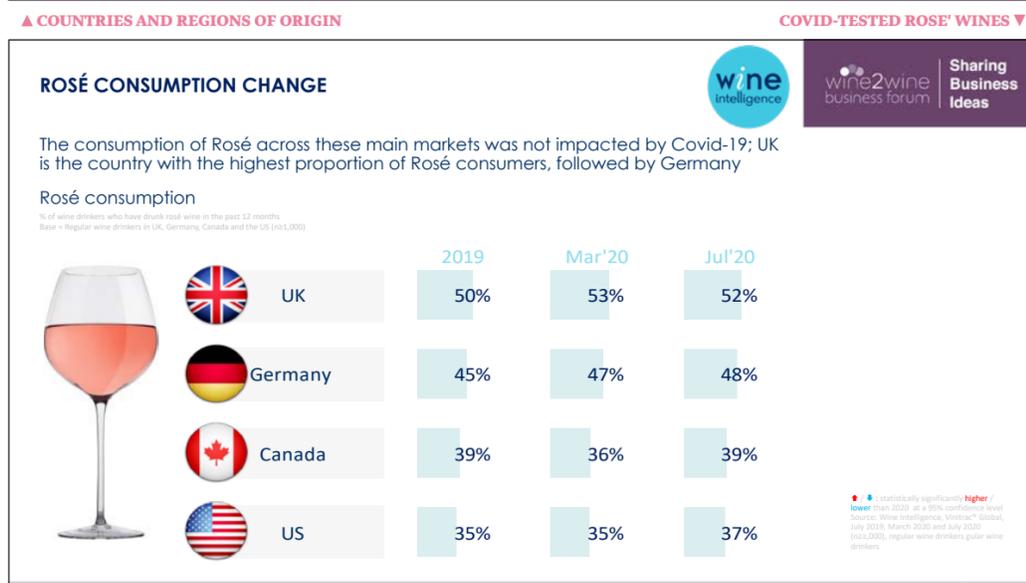
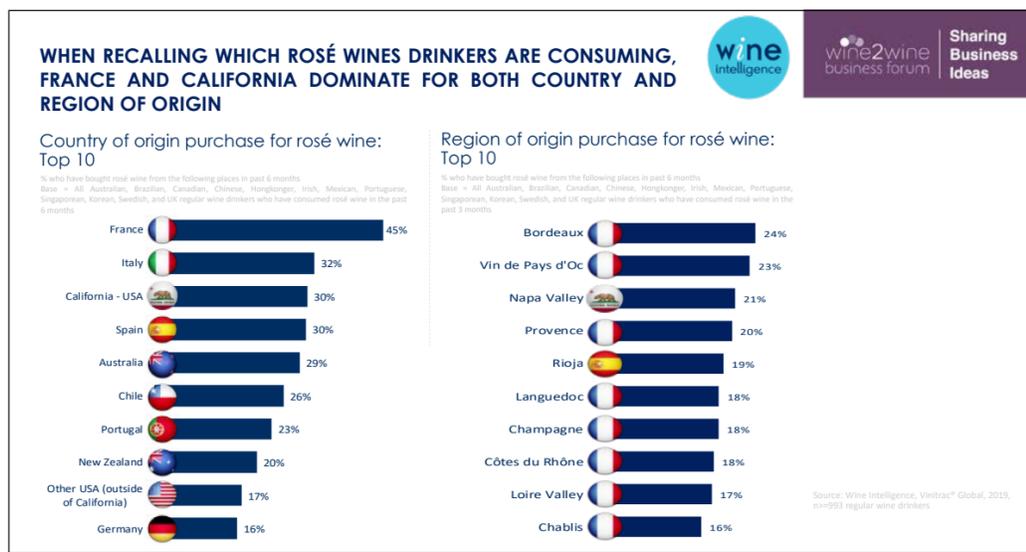
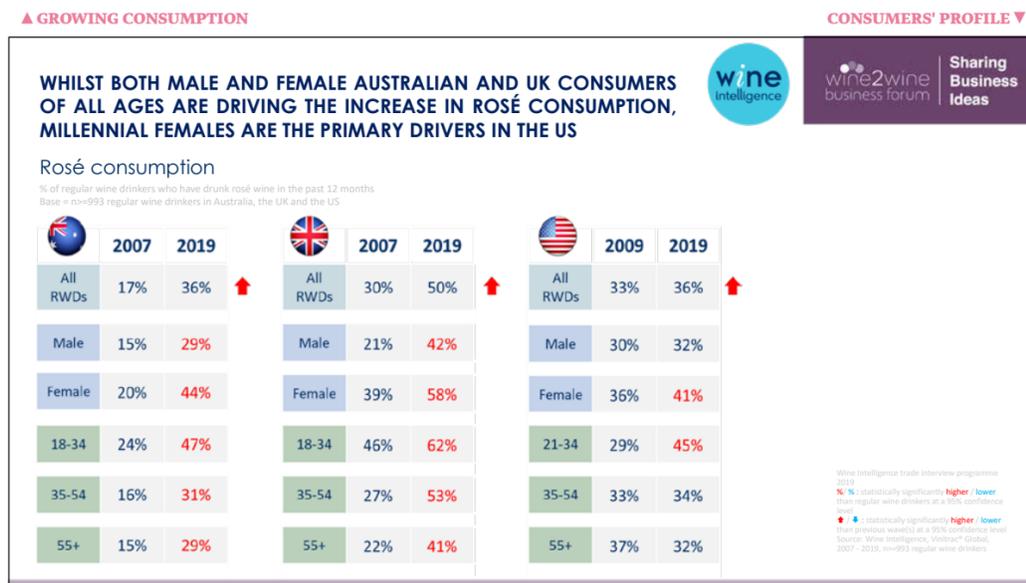
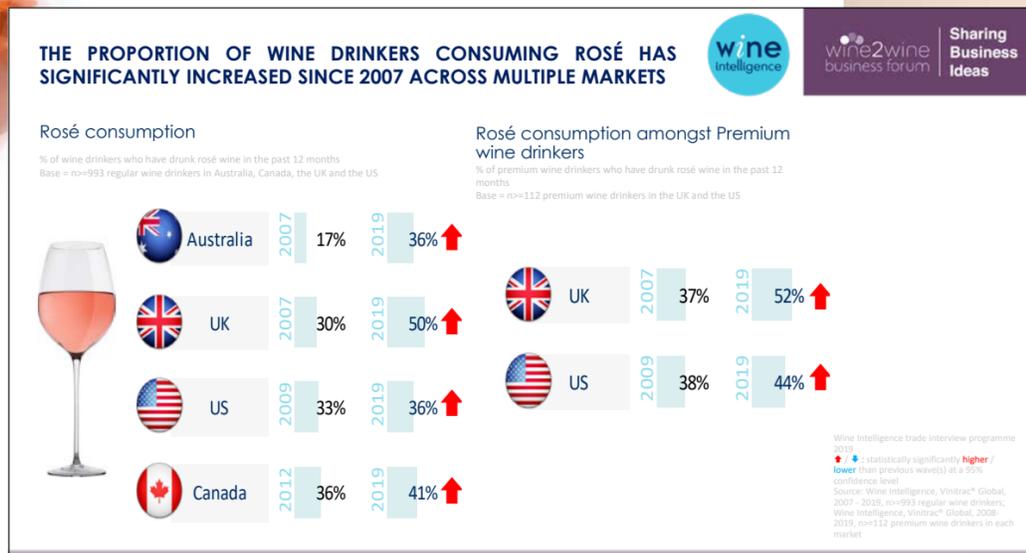
GLOBAL WINE TRENDS. ROSÉ WINES ON THE MOVE

COVID IS NOT STOPPING The Growth Of Rosé Wines

by **PIERPAOLO PENCO**, Country Manager for Italy at Wine Intelligence

Consumption is up, particularly among Millennials, and the choice of premium wine finally opens the door to a significant economic return for a category that has been held in little regard until now. Let us analyse the latest global trends on rosé wines with our Wine Intelligence data. They identify Prosecco Rosé as an element with the potential to break certain patterns of consumption in the sparkling and rosé wine categories

Everyone in the world seems to be drinking “pink”. Instagram is flooded with consumers relaxing with pink gin or a glass of pale rosé. The visual appeal and the increase in the quality of rosé wines attracts consumers of all ages and genders. The category of rosé wine keeps growing, driven by a wide appeal to all groups of consumers and supported by the increased premiumization within this subcategory. Rosé wines also benefit from the association with the concept of a drink that is “a small gift or reward,” and it could therefore produce supplementary sales rates in the medium or long term. According to data from surveys conducted worldwide by Wine Intelligence in recent years, the percentage of wine drinkers consuming rosé wines has increased significantly since 2007 in several markets, involving more or less all the segments of genders and generations, though predominantly women and young people. In Australia and the United Kingdom, both male and female drinkers of all ages are propelling the consumption of rosé, with millennials the main drivers of the category. The key factor that inspires the choice of a rosé wine is food pairing, especially in regular wine consumers in South Korea, Brazil, Singapore and the United States, while in other markets descriptors of taste and style present on labels or shop shelves work well. While France is the most popular country of origin for rosé wines, followed by Italy, many consumers are attracted to domestic options. When asked which rosé wines they are drinking, France and California dominate both for country and for region of origin. Even during this difficult period for the wine sector, we foresee that styles of high-quality fresh rosé wines will also progress in 2021, probably outside of the region of Provence, where their success is beginning to limit supply (helped by duties in a key market, the United States, applied by the previous administration and not yet abolished). In some of our forecasts we suggested that rosés would follow the growing consumer trend for more aromatic, fresh whites, with a lower alcohol content and for interesting red wines with lighter tannins.



Rosé wines fully marry this trend and seem to advance on all fronts, according to data observed up to now and the feedback that we received from workers in the global supply chain. From the data in our possession, consumption of rosé wines in these main markets was not influenced by the Covid-19 pandemic. The United Kingdom is the country with the highest percentage of rosé wine consumers, with over 1 out of 2 consumers choosing this category in the last 12 months, followed by Germany and Canada. Furthermore, many consumers are shifting to a lower-priced rosés than premium ones, with Provence leading the market of quality rosés. In the United States, the consumption of rosé wines among premium wine drinkers already went from 38% in 2009 to over 44% in 2019, while in the United Kingdom the percentage rose from 37% in 2007 to 52% in 2019. The question everyone is asking is what impact will Prosecco Rosé have on the category. Will this product be able to widen the pool of rosé wine drinkers, including sparkling wine lovers? Or, on the contrary, will it make those who first chose still rosé wines become sparkling wine drinkers? Pink sparkling wine, in fact, is no novelty but, up until now, it has been more of a niche product in the sparkling wine world. The media attention is already high, judging by the articles that various magazines and newspapers, especially in English language are dedicating to the new wine type that the Prosecco DOC consortium introduced to the market at the end of 2020 (e.g. The New York Times on February 8, 2021: “Meet the Proseccos You’ll Be Drinking This Summer” <https://www.nytimes.com/2021/02/08/dining/drinks/prosecco-rose.html>). As far as we are concerned, in 2021 we will be analysing the appeal for consumers, from distinctiveness of the category right up to purchase, through our Vinitrac survey on regular drinkers of global wine.



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OUR INQUIRY INTO THE MOST FAMOUS “PINK” WINE REGION IN THE WORLD



How The “Provence Dominion” Came About THE GLOBAL BENCHMARK FOR ROSÉ WINES

by BERTRAND BALLESTA

France produces almost a third of the whole world’s rosé wines (28%), followed by the United States and Spain, and it is also the first country for consumption of this category, with 34% of the world total. Driving this movement is Provence, a region that has known how to impose its “pink project” in the field and on the market. 38% of French DOC rosés come from these lands, 4.2% on a global level, but they can even reach 12.6% if we look at the value of commercial trade. This phenomenon has grown exponentially in the last decade. The views of Jean-Jacques Bréban, Président of the CIVP, Philippe Brel, Président of Cluster Provence Rosé, and Virginie Fabre and Guillaume Philip (Domaine des Diables) on the discovery of that “pale pink”

Between the Mediterranean and the Alps, the oldest vineyard in France stretches over 200 km, Provence. The vineyard area occupies a surface of 27,470 hectares, includes three appellations, 494 wineries, 63 cooperatives and boasts a production of 1.246 million hectolitres (in 2020), 90% dedicated to rosé wines (1.136 million hectolitres). Provence is firmly the first French wine region for this type of appellation wine, 134 million bottles sold (1.06 million hectolitres sold in 2020), 57.3 million of which are exported. The unique identity of Provençal rosé wines was built firstly on the generosity of nature, which offers an exceptional terroir. Varied elevations, shallow soils without excess humidity, good drainage, a Mediterranean climate, sunny (2700-2900 hours of sunlight per year), hot and dry, with the Mistral wind protecting vines from diseases caused by humidity. It is a terroir made to produce the most famous rosés in the world.

But it is not just down to the pedoclimatic conditions, which would not fully explain the speed of the phenomenon. In fact, in the last ten years Provence has managed to develop a unique and typical identity for its rosés, which is able to attract consumers and respond to new global trends. Just think, in the last two decades, bottles of rosé wine uncorked in the world have increased by 40%. It is a huge success for the whole wine type, due in part to the evolution of taste and lifestyles in a wide band of the population. Rosés are perfectly in line with new consumer preferences, which range from less structured dishes than the past and generally simpler food. Less time is spent in the kitchen, but there is no lack of desire for conviviality (in fact there is even more) and for immediate, accessible pleasure. In this sense, Provençal Rosé wine represents this desire for “freedom” very well, thanks to its

increasingly light colour and explosive suite of aromas.

Provençal Lands

The winegrowers of the region are working hard on the whole production cycle - from agronomic practices to the choice of the most suitable grape varieties, as well as updating winemaking processes - following the “*Tendance Provence*” formula, i.e. the idea of producing a rosé wine that represents the territory and is refreshing, fruity and aromatic. Without forgetting that Provençal wines also owe their fame, as well as to quality and originality, to fact that they are the authentic expression of a legendary region, with its charming and enchanting landscapes, rich history and pleasant climate. This charm also captivates visitors for the *joie de vivre* of the southern French coast, an atmosphere embodied by Provençal rosés that are intimately linked to their territory of origin.

To understand the origin of this global success, or rather the indisputable leadership of Provençal pink wines on international markets, and to analyse the economic situation of the region’s vineyards, we started by meeting with the men and women who build up the fame of Provence’s “pink nectar” every day, vine growers but also cooperative wineries and representatives of the various structures managing the supply chain, such as inter-professional organisations and ODGs (Organisms of Defence and Management).

Provençal People

For the president of CIVP, the Interprofessional Council of Provençal Wines, Jean-Jacques Bréban, “Rosé wine has always existed in Provence, for over 2000 years. The success of our wines is based firstly on the general modernisation of our viticulture and on access to new winemaking technology. A ‘revolution’ that we began 20 years ago which has enabled us to develop the profile of our Provençal rosés, especially towards paler coloured wines than those that used to be pro-

duced for this wine type. Because, in addition to wine quality, it is the specific colour of Provençal rosés that is our distinctive feature. Our *savoir-faire* is what first attracted the consumer. We managed to find the perfect alchemy between colour and power of aromas. We knew how to stand out, offering a unique sensory experience: an appealing colour to the eye, elegant and complex aromas on the nose, a lingering finish in the mouth identical to some reds but without the marked acidity of the past. We are continuing to study this rosé profile in minute detail to improve the quality, because we don’t want to rest on our laurels. However, it is important to point out that there is not just one Provençal rosé, but several. We are used to being told off for standardising our rosé wine. Despite this typical profile linked to its colour, its palette of aromas that is recognisable among a thousand, the

terroir and experience of the vine grower will always make the difference, while preserving the distinctive typicity of our products. A vine in a vineyard on the shores of the Mediterranean and a vine in a more central vineyard inland, will not produce identical wines. I want to remind you that the Provençal vineyard is made up of more than 20,000 hectares and that production covers three distinct appellations: AOP Côteaux de Provence, AOP Côteaux de Aix-en-Provence and AOP Côteaux varois en Provence”. For Mr. Bréban, one of the factors of this success is based on the interprofessional organisations’ ability to convince the various players in Provençal viticulture to follow one, identical direction. “As a management organism, our main objective is to respond to the collective challenge of production, processing, sales and distribution,” he said.

Jean-Jacques Bréban, President of the CIVP



TOP 3 EXPORT MARKETS IN 2020



1 USA
175,971 hectolitres
€ 118,382,944



2 UK
86,686 hectolitres
€ 56,445,152



3 Netherlands
30,668 hectolitres
€ 17,318,156

Source: C.I.V.P.

Philippe Brel, Director of the Estandon Cooperative Winery d'Estandon and President of the cluster "Provence Rosé"



© Cantina Estandon

THE BIRTH OF SUCCESS

In the words of Philippe Brel, director of the Estandon Cooperative Winery and President of Cluster Provence Rosé

"In the 1980s, we were lucky enough to have a handful of pioneering vine growers in the territory, who were daring enough to produce pale, aromatic rosés with great elegance," said Philippe Brel, director of the Estandon cooperative winery (300 members, 160,000 hectolitres sold, 20 million bottles, a turnover of about 50 million euros) and president of Cluster Provence Rosé.

"These wines are totally different from traditional Provençal rosé wines, produced with the drawing off technique which gave meaty, very dark rosés, which could even be compared to light reds. Thanks to the immediate success met by these new rosés, we realised that a new style of rosé wine could be created with a pale colour and an important aromatic impact, attracting enthusiasts thanks to an emotional and sensory shock. We mustn't forget that pink is the colour of emotion in the collective unconscious. Moreover, rosé, unlike red, is not a "difficult" wine, it doesn't need culture or in-depth knowledge of the wine world to be appreciated."

"One of the key factors to the success of our rosé wine is certainly the renewal of the Provençal vineyard," Mr. Brel explained. "With more suitable grape varieties to produce this new style. We have replaced Carignan with Grenache, a variety that lends itself well to making these pale and aromatic rosés. 30 years ago, we placed a lot of hope in Syrah, but we were disappointed, because it produced wines with a too-intense colour, so we decided to reduce the surface area given to it from 20% to 10%."

Another key factor has been the growing professionalism of winegrowers of the region. In fact, we have gone from vine growing as a secondary or accessory activity to professional vine growing. Lastly, we need to mention the in-depth restructuring of winemaking systems, a technical evolution that has involved the wineries with collective access to new technology.

"More recently, on a market level, another determining factor can be found in the visibility of great brands," the director of the winery continued. "Which have stolen the limelight in the last ten years. We are talking about Miraval (Brad Pitt and Angelina Jolie) or Lichine (LVMH), who have given a certain 'Champagne air' to our production. Their fame has enabled a transcendent and added value for our wines. The power of these brands has enhanced the whole production of Provençal rosés. Also, the Interprofessional organizations have carried out a fundamental role, especially in their openness towards new markets. The CIVP (Interprofessional Council of Provençal Wines) managed to accompany rosé wine in its conquest of the world. For 15 years it has invested half its budget in exports, a market that at the start represented only 10% of sales, while today it has reached 43%. As for Cluster Provence Rosé, since 2014 we wanted to bring together companies that supply products, services and consultancy to the winemaking supply chain and contribute to its development. Today we number 45 members, including suppliers of farming machinery and winemaking products, wine consultants, laboratories, insurers, banks and lawyers."

A project on agroecological transition, called "Sol Vivant," has been in the works for two years now, with a series of experiments that are being carried out to improve soil life.

"If we have a live, healthy soil, we will have more resistant vines with more regular production and more interesting quality," Mr. Brel said. "The vineyard of the future will be able to resist climate change. We believe that agroforestry is a subject worth considering, which tries to get trees to live alongside the vine, considers the vine as part of a real global ecosystem, an integral part of biodiversity. The latest programme that we are developing is 'Climate Responsibility', which pursues the aim of balancing the carbon footprint for all the wine appellations. The ambition is to reduce CO₂ emissions and to share more efficient practices from this point of view. We want to be innovative and find more virtuous possible solutions that become new strongpoints for Provençal wines."

► "We managed to federate all the key players in the supply chain, from independent wineries to cooperatives (more than 60% of the market), as well as bottlers, in a common project. Priority has been given to the image of the terroir, to the collective action rather than individual fame. Ten years ago, I launched this idea of "collective intelligence", and this is precisely what represents our strength today compared to other production areas. Our challenge was also aimed at expanding our current clientele, we gained market shares in consumers who don't usually drink wine, and women, who easily identify with this product. Moreover, we reached a younger clientele, which makes us hopeful for the future. Another important point is that we were able to benefit from the change of consumption seasonality of rosé wine, in fact today this wine type is drunk all year round, while previously it was mainly a summer choice."

Provençal Logistics

One of the strengths of Provençal rosé wines is certainly their distribution on all the international markets, due to an incredible development in both volume and value of exports in the last ten years. Jean-Jacques Bréban explains the reasons for this success and clarifies the current context of Provençal rosés on foreign markets. "We managed to fully and strongly develop our international strategy," Mr. Bréban said. "For 20 years our exports

were stationary at shares of 7-8%, while today we have reached almost 43%. But we won the great challenge of internationalisation here, in our land of Provence. Let's not forget that the Var (an administrative region including Provence, the Alps and the Côte d'Azur) is the second French tourist department with 10 million visitors each year. To a certain extent, this large flow of tourists, especially foreign ones, has contributed to developing the image of our wines abroad. The word Provence is known all over the world as a symbol of sun, sea, beautiful landscapes, as well as rosé wines.

"Despite a difficult 2020, Provençal rosés have held up well on international markets," Mr. Bréban continued. "With a positive result of +3%, a total of over 429,000 hectolitres in export volumes for a value of almost 30 billion euros. We have observed strong growth on the UK market (+51% in volume and +51% in value) and the Netherlands (+44% in volume and 50% in value), which compensated for the slowing down of the American market due to duties authorised by the Trump administration. By 2035 we expect world consumption of rosés to increase by about 50%, with strong growth in Europe, North America, but also in Southeast Asia and Oceania. Markets that are still 'new' but with a high potential. In total, we believe that about thirty markets will expand, obviously we want to occupy a central

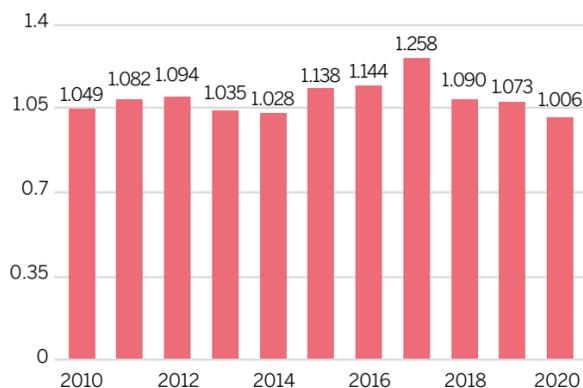
place in this international disruption, so that the style of Provençal rosé wines remains a benchmark on the market for this wine type. Today we can clearly confirm our leadership in rosé wines on a global level."

Provençal Marketing

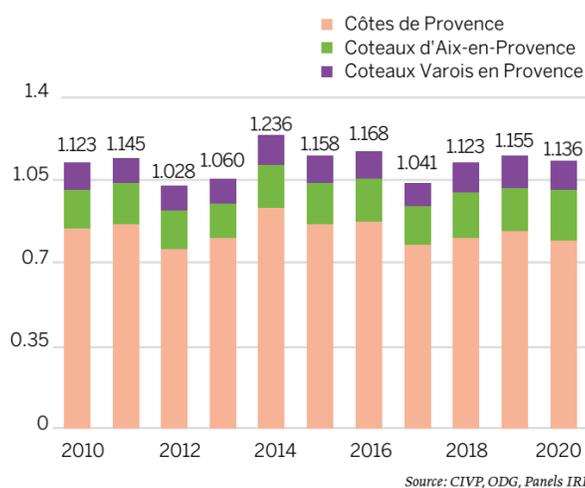
But the feats of Provençal rosés have been made possible also thanks to the preponderant role of marketing and communication strategies. "As president of the Interprofessional Council of Provençal Wines, I wanted to emphasize the development of strong communication, Mr. Bréban said. "This work on image, fame, is essential for preserving our market share both in the national and international field, but also to continue our dynamics of sales development. We must put financial means into play that can measure up to our ambitions, which is why we invest 3 million euros a year in promoting our wines: 1.5 million for France and 1.5 million for the rest of the world. We have implemented a real strategy of digital communication, favouring social networks and partnerships with digital virtual fairs. The development of our so-called classic communication towards more digital aspects has obviously intensified with the Covid pandemic and the limitations linked to confinement." On the problems of global warming for the whole French vineyard, Jean-Jacques Bréban confirmed that "in Provence, as in other wine regions, the

Below, the numbers for Provençal wines

SALES OF PROVENÇAL ROSÉ WINES (in millions of hectolitres)

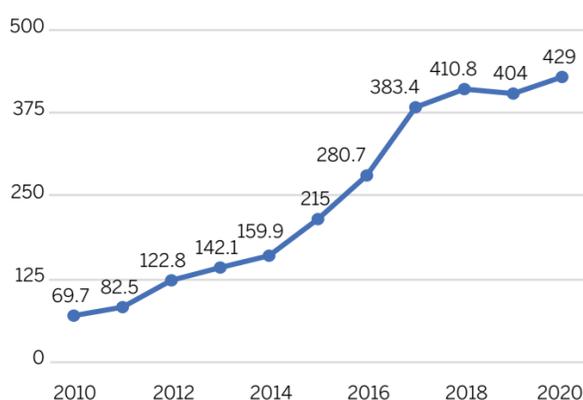


PRODUCTION OF PROVENÇAL ROSÉ WINES (in millions of hectolitres)

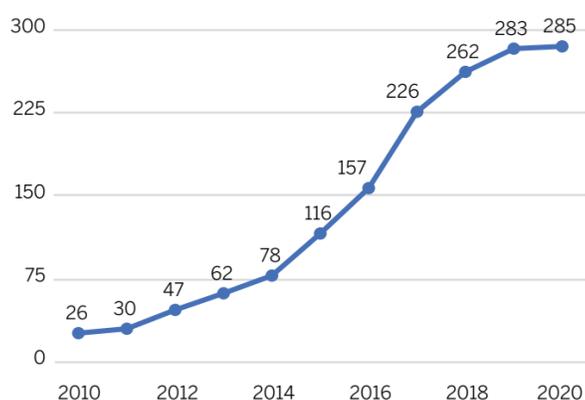


Source: CIVP, ODG, Panels IRI

EXPORTS OF PROVENÇAL ROSÉ WINES IN THE WORLD IN QUANTITY (in thousands of hectolitres)



EXPORTS OF PROVENÇAL ROSÉ WINES IN THE WORLD IN VALUE (in millions of euros)



Source: C.I.V.P.

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problems of climate change are becoming more central, posing the question of the permanence of wine typicity, seeing that production conditions are changing. Therefore, today we are working with the research and experimental centre for rosé wines on strategies to adapt grape varieties, especially with very old, non-French varieties or derived from new crosses, but also by applying new ways of training vines. 2021 will not be an easy year, but we are setting the bar high. We have already prepared action plans to strengthen our presence on various markets and developed our main objectives for the year, aimed at three categories: French professionals (in food service and tourism), mass retail and exports. We are optimistic about the ability of our rosé wines to grow in the next few years, it is our know-how and wine qual-

ity that have always made our success possible. It is an important criterion today, but it will be even more so tomorrow. The whole supply chain must stay united. We must continue to innovate and communicate."



The story of Virginie Fabre and Guillaume Philip, Domaine des Diabes producers in Provence

A QUALITY THAT COMES FROM TECHNOLOGICAL PROGRESS

"We moved to Provence in 2005 and had the chance to buy an abandoned vineyard of 15 hectares that we completely renewed, uprooting ¾ of the vines, as well as renovating the cellar," said Virginie Fabre and Guillaume Philip, producers in Provence.

They told the story of how their Domaine des Diabes began.

"During the first vintages we developed a new cultivation and winemaking process," they said. "We were the forerunners of cold pre-fermentation maceration. It is a process that, until that time, had never been used in Provence for rosés. With this technique we really make the most of what the terroir can give us, we can optimise extraction of the varietal potential of a vintage. Thirty years ago, rosé wines were produced with the maceration technique; gradually it moved on to direct pressing, and lastly, the arrival of cold management has enabled us to carry out better decantation of must before fermentation. The improvement in quality of our Provençal rosé wines is undoubtedly linked to technical progress, decided on together with the vinegrowers of our three appellations."

Why has Provence managed to achieve such huge success with its rosés?

"One possible answer is that here we produce rosé wine on all the vineyard plots. Often in other regions, rosé is considered an easy option for the production of young vines, which cannot immediately produce grapes suitable for making great red wines. Our reputation as specialists in rosé wine is mainly based on this difference: we (also) produce rosé wines from our oldest vineyards and treat our wines as if we were making great reds or whites. As for the approach with the consumer, on the other hand, we have to say that the colour of rosé wine immediately creates a sense of pleasure in the subconscious, a sensory criterion linked to the colour which affects the final choice. We have managed to associate this pale colour with a specific aromatic balance and a perfect combination of power and finesse.

Today, there are many Provençal rosé wines on the market, if you want to distinguish between them it is essential to find a distinctive feature, to show creativity and innovation, as well as an intrinsic quality of the product. So, we created the MIP (Made in Provence)



Virginie Fabre and Guillaume Philip, Domaine des Diabes producers

DOMAINE DES DIABLES & MIP

trademark, favouring a territorial brand rather than the name of our winery. It is a brand that works well because everyone can understand it, it is easy to pronounce and identifies immediately with the production territory. We have treated our wine like a jewel, for 10 years we have been creating a real aesthetic revolution of our bottles and labels of Provençal rosés. A modern and bold line, deriving from the world of luxury. A new and original image of our products that we can allow ourselves here, unlike in other wine regions such as Bordeaux and Bourgogne, where a certain more rigorous formality is a must."



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INNOVATION IN RED WINEMAKING PROCESS BY ULTRASOUND TECHNOLOGY

by ANDREA NATOLINO*, TOMÁS ROMAN**, GIORGIO NICOLINI**, EMILIO CELOTTI*

*Department of Agricultural, Food, Environmental and Animal Sciences, University of Udine (Italy)

**Edmund Mach Foundation (Italy)

1. Introduction

Polyphenols play a fundamental role in enology, especially in the color and flavor of red wines. This class of compounds comes from different parts of grapes and they have different chemical structure and, consequently, different chemical properties and reactivity. Anthocyanins and tannins are the most abundant and important grape polyphenols, as they greatly influence the color, taste and maturation potential of the wines. Anthocyanins are the main compounds responsible for the color of red young wines, but they are unstable and their content decreases along wine aging due to degradation and stabilization reactions (He et al., 2012). Tannins, especially proanthocyanidins, are the main compounds affecting astringency and bitterness perception.

The maceration step is an extraction process of the grape components, with a special focus on polyphenols. Generally, in typical red winemaking, 30-50% of the polyphenols end up in wine, and the last 50-70% remain in grape tissues. Every phenol class and every given compound show different extraction rate and coefficient, depending on three main factors: location, polarity and molecular size (Waterhouse et al., 2016). Several procedures and techniques can be used to enhance the extraction rate and yields: enzymatic reactions, heat treatments, time extensions, mixing and others. Other chemical and physical technologies have been studied to enhance the extraction of grape components, such as ultrasound, microwave, pulsed electric fields, high pressures, and others (Morata et al., 2015; Tartian et al., 2017).

Ultrasound has been considered one of the most promising techniques to be applied on winemaking processes (Plaza et al., 2019). Recently, the International Organization of Vine and Wine has officially approved the ultrasound treatment of crushed grapes to promote the extraction of their compounds (OIV, 2019).

The high intensity and low-frequency ultrasound waves can induce physical and mechanical effects on biological and molecular structures, and chemical effects through the formation of high reactive radical species (Bhargava et al., 2021).

In wine research, this technology has been studied for several purposes in winemaking processes, such as the extraction of phenolic compounds during maceration (Bautista-Ortín et al., 2017), the extraction of aroma precursors (Roman et al., 2020), replacing the preservatives addition (Clodoveo et al. 2016), management of wine microbiology (Jiranek et al., 2008), and valorization of winery by-products (Natolino et al., 2020; Romero-Díez et al., 2019). In addition, ultrasound is also regarded as the most promising technique for accelerating the wine aging process (Tao et al., 2014; García-Martin et al., 2013), specifically considering its effectiveness on changing the chromatic characteristics and phenolic properties of red wines (Tiwari et al., 2010; Celotti et al., 2016; Ferraretto et al., 2016). Despite the several studies on ultrasound technology, none of the over mentioned applications has been scaled up at the industrial level. After laboratory study and optimization, it is generally desirable that a process be directly transferable to an industrial-scale production environment. To do that, it is essential to make sure that all processing conditions remain the same: this will ensure that the final product quality is un-

changed while the productivity rate is increased (Peshkovsky, 2017). Several approaches can be adopted for a successful scale-up process. One of them is a direct method using a pilot-scale plant to simulate the operative conditions and process efficiency at the production level.

The present work resumes the pluriannual researches carried out at laboratory and pilot-scale, aimed to study the effect of ultrasounds during different steps of the red winemaking process, using respectively: a static laboratory sonifier and a pilot plant at continuous mode. The effect of the main ultrasound process parameters was studied at laboratory scale, on anthocyanins, tannins, and color stability indices of two young red wines.

A number of technological experiments at pilot-scale level were carried out on different grape cultivars from different wineries and producing areas, to study properly the potential effectiveness of ultrasounds on the winemaking process. Potential effects of ultrasound on some chemical reactions, involved during wine aging, have been considered.

2. Materials And Methods

2.1. Laboratory Scale Trials

Two young red wines (WA and WB) from different wineries of the Valpolicella region (Italy) were considered for the laboratory scale trials. All the experiments were carried out in an ultrasonic sonifier (Sonoplus model HD 2200, Bandelin electronic, Berlin, Germany) equipped with a titanium alloy flat tip probe (13 mm diameter) (TT13, Bandelin, Berlin, Germany) (Figure 1). Samples were processed in a continuous mode at a constant frequency of 20 kHz. The energy input was controlled by setting the amplitude of the sonicator probe; the total nominal output was 200 W. An ice bath was adopted to avoid the increase in temperature of up to 35°C, which was continuously monitored.

Samples of wine A (WA) were sonicated for 3 min at two levels of amplitude (40 and 80%) to assess the amplitude effect. Instead, samples of wine B (WB) were sonicated at fixed amplitude (80%) but at different levels of sonication time (tUS) (1, 3, and 5 min).

2.2. Pilot Scale Trials

The technological experiments were carried out on three grape samples (Raboso, Amarone and Lagrein), at different wineries and producing areas. A prototype ultrasound plant (Figure 1), supplied by TMCI Padovan (Vittorio Veneto, Treviso, Italy), was used in continuous mode at the end of the crusher destemmer. An appropriate Y-valve was placed between crusher-destemmer and sonication time, in order to split into equal and homogeneous aliquots and to ensure the comparison of untreated and sonicated samples. All the trials were carried out at fixed frequency (27 kHz), amplitude (100%), and sonication time (2 min). Subsequently, the same operative protocols and vinification conditions were adopted for untreated and sonicated samples.

A technological experiment was also carried out on a Merlot wine, before the aging period. The same ultrasound plant was used at the same frequency (27 kHz) and amplitude (100%), but at different sonication times (3, 10, and 20 min).



Figure 1. Laboratory (A) and Prototype (B) ultrasound plant

2.3. Analytical Determinations

The effects of ultrasounds on the main phenolic compounds at laboratory scale were evaluated by spectrophotometric methods. Anthocyanin, Tannins, Flavan-3-ols contents, and color intensity were determined using the methods reported by Ribereau-Gayon et al. (1965), Bate-Smith (1954), Zironi et al. (1992), and Glories (1984), respectively. Anthocyanin profile was also measured using an HPLC method (Morata et al., 2006), with slight modifications.

The sonication of crushed grapes by prototype plant was evaluated by the determination of optical densities at 280, 420, 520 and 620 nm (Glories, 1984), anthocyanin content (Ribereau-Gayon et al., 1965) and anthocyanin oxidability indices (Celotti et al., 2006). The optical densities of untreated and sonicated Raboso and Amarone samples were monitored along all maceration periods (7-8 days).

Untreated and sonicated Merlot wine samples were evaluated along 45 days of aging by several

analytical indices: anthocyanin content (Ribereau-Gayon et al., 1965), color intensity (Glories, 1984), polymerized pigments index (Glories, 1978), and HCl index (Glorie, 1978).

2.4. Sensorial Analysis

A sensorial evaluation of untreated and sonicated samples of Lagrein variety was carried out by a selected panel of 10 judges. Several descriptors regarding aroma, taste and flavour were considered. Judges scored the magnitude of each attribute from 1 to 7 where 1 was "low" and 7 was "high".

2.5. Statistical Analysis

All laboratory experiments were performed in triplicate, and the results were expressed as mean \pm standard deviation. Minitab 17 software (Minitab Inc., State College, PA, USA) was used for statistical analysis by one-way analysis of variance (ANOVA, with Tukey's HSD multiple comparison) with the level of significance set up at $p < 0.05$.

SIMEI-UIV AWARDS THE ULTRASOUND TECHNOLOGY IN RED WINEMAKING PROCESS

This research was presented at the Enoforum Web Conference, the global contest organized by Vinidea that had over 5.500 participants from 70 countries to its first edition, 62 speakers and 10 hours of online learning for three days, 42 scientific papers presented by as many researchers coming from eight different nations



"Innovation In Red Winemaking Process by Ultrasound Technology" is the research work by Andrea Natolino at the University of Udine, alongside with Emilio Celotti and Tomás Roman and Giorgio Nicolini from FEM, that received the SIMEI-UIV award dedicated to the best paper on technology at the Global Fair for Technology for Winemaking and Bottling, promoted by the Unione Italiana Vini. The scientific community was able to present its innovative work in the winemaking field – and be recognised for it – at the Enoforum Web Conference last February, the global contest organized by Vinidea (www.vinidea.it). In the coming pages, you will learn all about the award-winning paper.

Bringing science and world wine production into an interactive dialogue was the ambitious goal of this virtual congress. The results were exceptional: over 5.500 participants from 70 countries, including oenologists, agronomists, producers, researchers and suppliers; 62 speakers for 10 hours of presentations; four languages delivered simultaneously; partnerships with 25 organizations from eight wine-growing countries.

The world of research was represented above all by the OIV, but also by prestigious associations of researchers from Italy, France, Spain, Australia, South Africa. With their professional endorsement, it was possible to receive over 100 scientific contributions, most of which were presented during the three days of the Enoforum Web Conference. World wine production has joined the Vinidea initiative through the support, both technical and economic, of the associations of producers and technicians of Italy – including SIMEI, the world leading fair in technology for winemaking and bottling, organized by Unione Italiana Vini (www.simeit.it) –, France, Spain, Chile, Brazil, Australia, South Africa, the United States and Portugal. The 42 research papers presented at the congress by researchers from eight countries around the world concerned current issues of viticulture (resistant varieties, precision harvesting, green defense strategies, resilience to climate change, artificial intelligence, etc.) and oenology (antioxidant alternatives to sulfur, effects of different species of yeasts and bacteria, ultrasound, new techniques for process monitoring and sensory analysis, etc.).

Conference videos and articles are available on www.infowine.com



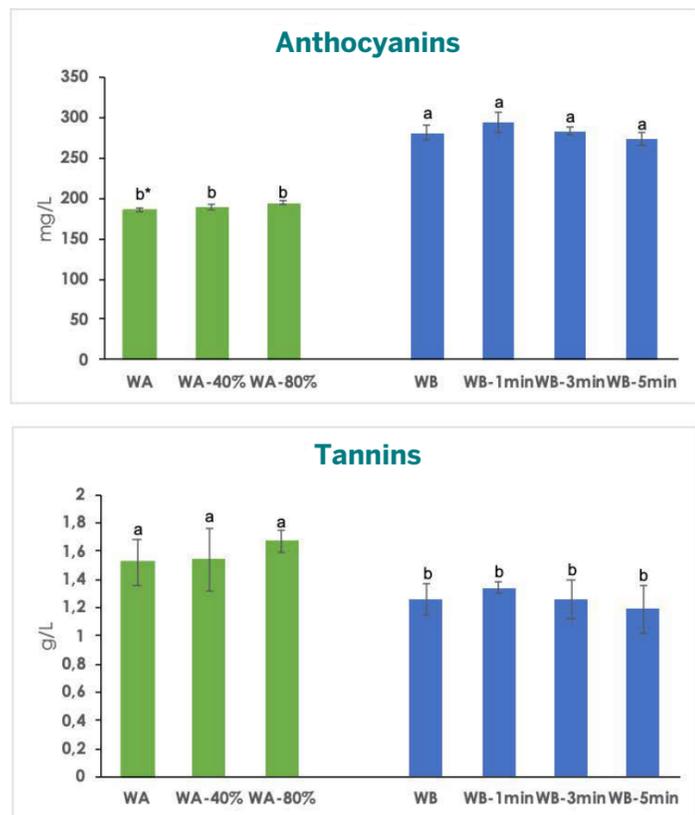


Figure 2. Anthocyanins, Flavan-3-ols, Tannins content, and Color Intensity of untreated and sonicated young red wines

* Each data represents the mean of three replicates ± standard deviation
Values with different letters indicate significant differences (p<0.05)

Figure 3. Malvidin-3-glucoside content

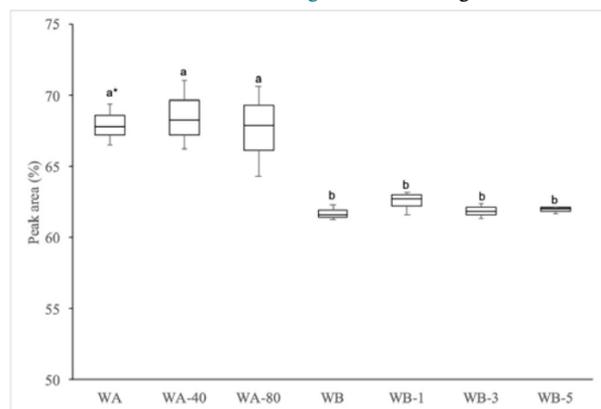
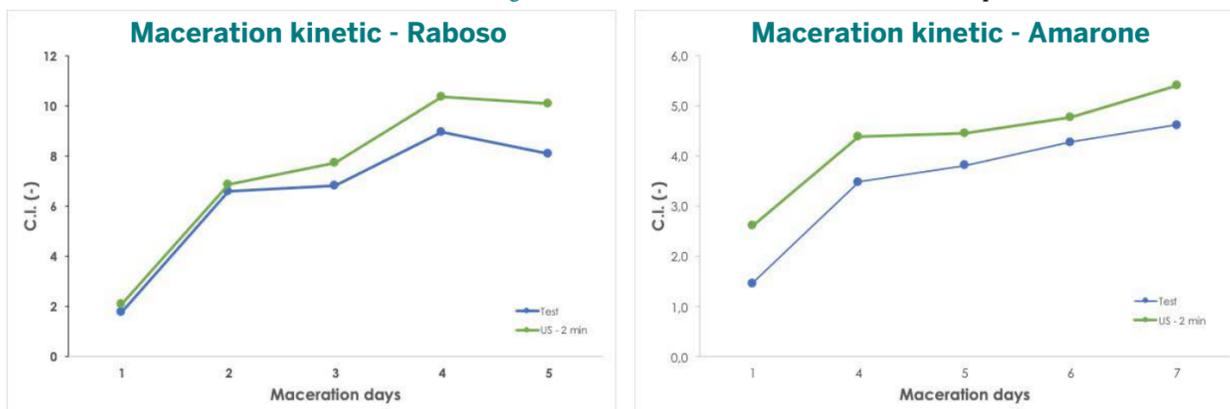


Figure 4. Maceration kinetic of untreated and sonicated samples of Raboso and Amarone



3. Results And Discussion

3.1 Laboratory-scale Trials

In the initial step, several ultrasound treatments were carried out at a laboratory scale in order to evaluate the effect of acoustic cavitation on the main polyphenol compounds, involved in the winemaking process. Two red young wines were considered as model systems, and they were sonicated at different levels of amplitude (40 and 80%) and time (1, 3, and 5 min). Figure 2 shows the results of anthocyanins, flavan-3-ols, tannins content, and color intensity of untreated and sonicated samples. The amplitude and sonication time didn't affect anthocyanins, tannins, and color intensity (Figure 2). Only flavan-3-ols content showed a slight decrease at the maximum level of amplitude

(80%), probably due to the chemical degradation promoted by ultrasounds as reported by Zhu et al. (2018).

Ultrasound has been well studied on extraction processes, and it is already well known that it can induce an increase in mass transfer mechanisms and extraction yields and efficiency (Chemat et al., 2017). As reported by Lukic et al. (2019), the application of ultrasound should ensure the preservation of sensory properties of wines, including color characteristics and stability. Ultrasonic waves could lead to changes in phenolic composition due to the cavitation phenomenon, which can induce high temperatures and the formation of radical species and trigger oxidation reactions, after the collapse of cavitation bubbles. High levels of amplitude generate high intense acoustic cavitation, which can induce degradation of phenol compounds (Kidak et al., 2006). In view of this, it is extremely im-

portant to select suitable ultrasound amplitudes to preserve polyphenols content and chromatic properties.

An HPLC analysis was carried out on untreated and sonicated samples to highlight any possible effect of ultrasound at different amplitudes and times on anthocyanin profiles (Figure 3 and Table 1).

As reported in Figure 3, malvidin-3-glucoside, the main anthocyanin of red wines, is not affected by sonication treatments at 40 (68.51 ± 2.43) and 80% (67.65 ± 3.17) of amplitude, compared to the untreated sample (67.95 ± 1.45). The same results are reported by Zhang et al. (2016), who highlighted no changes on malvidin-3-glucoside content in wine samples after 14 and 28 min of sonication.

Also considering the minor anthocyanin compounds (Table 1 and 2), in most cases, no significant changes can be highlighted between untreated and sonicated samples. Moreover, the increase of amplitude and sonication time didn't affect the anthocyanin profiles.

It's notable that the sonication treatment should be modulated and optimized in order to enhance the extraction rate and efficiency during the grape maceration. At the same time, it is fundamental to avoid any degradation mechanisms of polyphenols to maintain the quality properties.

3.2. Pilot-scale Trials

3.2.1. Crushed Grapes Treatments

A prototype ultrasound pilot plant was used to evaluate the effect of the cavitation phenomenon on crushed grapes at different wineries. Three different grape samples were chosen to consider different native polyphenol compositions.

In Figure 4 are depicted the maceration kinetic of untreated and sonicated samples of Raboso and Amarone, considering color intensity as quality technological parameter. During the first two days of Raboso maceration, no differences can be highlighted between untreated and sonicated samples. The kinetics starts to diverge after three days, and subsequently the sonicated sample shows higher color intensity. Also sonication of dehydrated grapes, for Amarone production, induced higher color intensity during the maceration period, which indicates a better extraction process of phenol compounds. It is notable that sonication allowed the same color intensity of untreated samples after only 3-4 days of maceration. Ultrasound induced a potential decrease of maceration time between 40-60%. Besides economic advantages, a lower contact time with solid grape fractions could reduce the probability of undesirable microbial growth, which can negatively affect the quality of the final product.

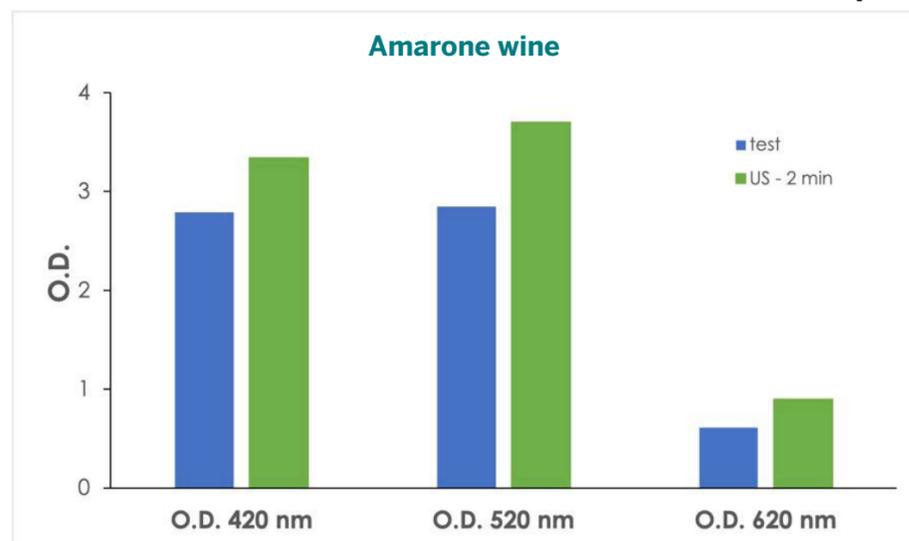
Table 1. Anthocyanin profile - effect of sonication amplitude

Compound	Amplitude		
	0%	41%	81%
Delphinidin-3-monoglucoside	1.60 ± 0.16 b*	3.15 ± 0.26 a	3.21 ± 0.19 a
Cyanidin-3-monoglucoside	0.46 ± 0.08 a	0.68 ± 0.15 a	0.69 ± 0.11 a
Petunidin-3-monoglucoside	5.03 ± 0.23 a	5.00 ± 0.21 a	4.96 ± 0.24 a
Peonidin-3-monoglucoside	7.65 ± 0.39 b	9.88 ± 1.25 a	9.55 ± 0.55 a
Vitisin A	1.14 ± 0.10 a	1.32 ± 0.11 a	1.33 ± 0.11 a
Petunidin-3-monoglucoside acetylated	0.55 ± 0.09 a	0.66 ± 0.11 a	0.55 ± 0.06 a
Peonidin-3-monoglucoside acetylated	1.35 ± 0.17 a	1.34 ± 0.38 a	1.91 ± 0.44 a
Malvidin-3-monoglucoside acetylated	7.37 ± 0.33 a	7.99 ± 1.40 a	7.01 ± 0.37 a
Delphinidin-3-monoglucoside p-coumarylated	2.82 ± 0.16 a	2.48 ± 0.20 a	2.57 ± 0.40 a
Malvidin-3-monoglucoside p-coumarylated	4.13 ± 0.26 a	4.26 ± 0.26 a	4.39 ± 0.51 a
Malvidin-3-monoglucoside vinylphenol	n.d.	n.d.	n.d.
Malvidin-3-monoglucoside vinylphenol acetylated	n.d.	n.d.	n.d.

Table 2. Anthocyanin profile - effect of sonication time (t_{us})

Compound	t _{us}			
	0 min	1 min	3 min	5 min
Delphinidin-3-monoglucoside	3.97 ± 0.36 a*	3.94 ± 0.30 a	3.88 ± 0.24 a	4.15 ± 0.15 a
Cyanidin-3-monoglucoside	0.98 ± 0.20 a	0.93 ± 0.18 a	0.95 ± 0.20 a	0.99 ± 0.02 a
Petunidin-3-monoglucoside	5.51 ± 0.29 a	5.10 ± 0.78 a	5.52 ± 0.14 a	5.30 ± 0.33 a
Peonidin-3-monoglucoside	10.39 ± 0.02 a	10.75 ± 0.12 a	10.30 ± 0.65 a	10.94 ± 0.28 a
Vitisin A	2.17 ± 0.07 a	2.13 ± 0.16 a	2.27 ± 0.10 a	2.19 ± 0.08 a
Petunidin-3-monoglucoside acetylated	0.73 ± 0.03 a	0.71 ± 0.05 a	0.74 ± 0.07 a	0.69 ± 0.02 a
Peonidin-3-monoglucoside acetylated	2.12 ± 0.36 a	1.64 ± 0.68 a	2.00 ± 0.16 a	1.41 ± 0.59 a
Malvidin-3-monoglucoside acetylated	6.39 ± 0.59 a	6.15 ± 0.58 a	6.41 ± 0.20 a	6.12 ± 0.12 a
Delphinidin-3-monoglucoside p-coumarylated	2.21 ± 0.10 a	2.25 ± 0.07 a	2.14 ± 0.09 a	2.23 ± 0.05 a
Malvidin-3-monoglucoside p-coumarylated	3.24 ± 0.12 a	3.32 ± 0.05 a	3.37 ± 0.03 a	3.43 ± 0.13 a
Malvidin-3-monoglucoside vinylphenol	0.15 ± 0.02 a	0.16 ± 0.03 a	0.19 ± 0.01 a	0.18 ± 0.01 a
Malvidin-3-monoglucoside vinylphenol acetylated	0.41 ± 0.01 a	0.37 ± 0.04 a	0.39 ± 0.02 a	0.39 ± 0.03 a

Figure 5. Comparison of Amarone wines obtained from untreated and sonicated samples



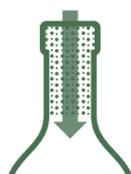
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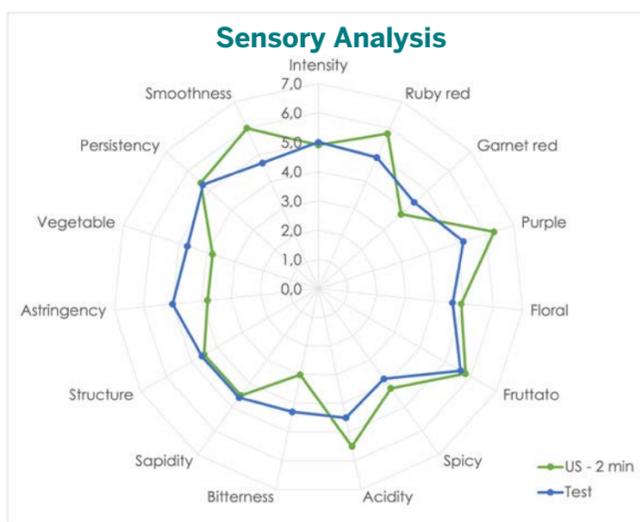
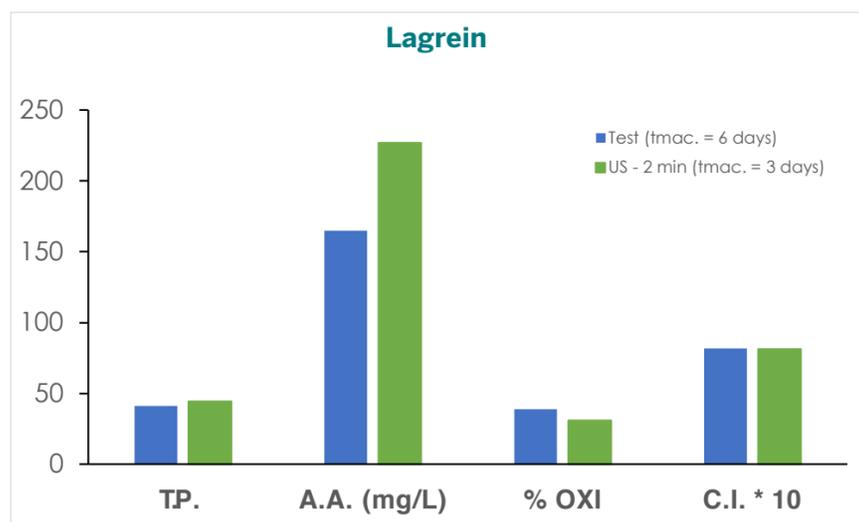


Figure 6. Comparison of Lagrein wines obtained from untreated (t_{mac} = 6 days) and sonicated samples (t_{mac} = 3 days)

Figure 7. Sensory evaluation of Lagrein wines obtained from untreated and sonicated samples

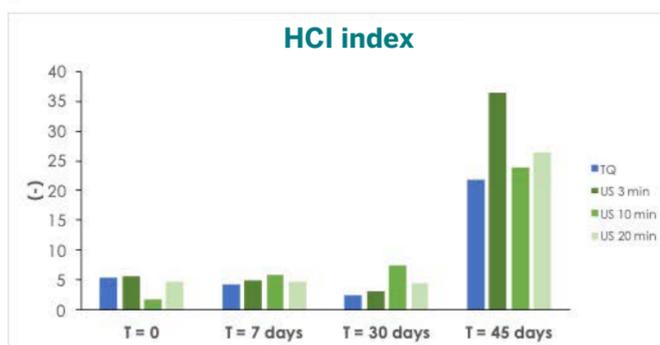
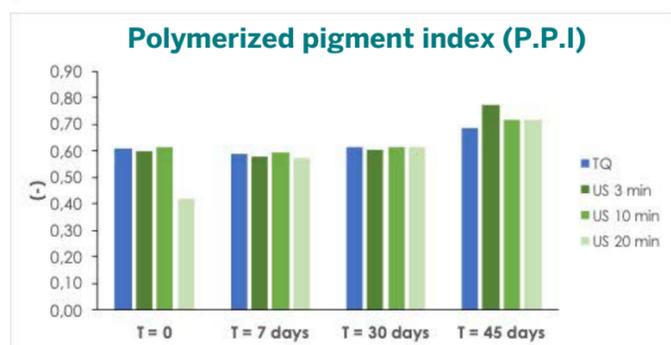
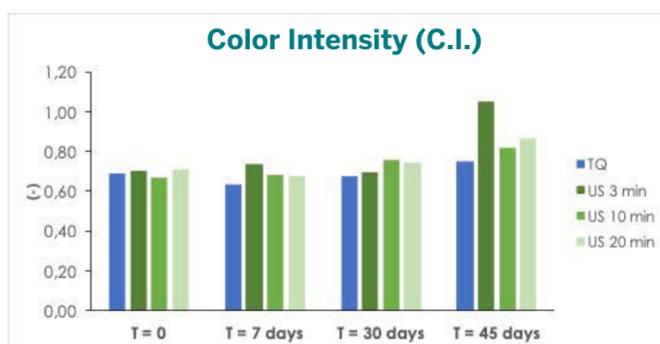
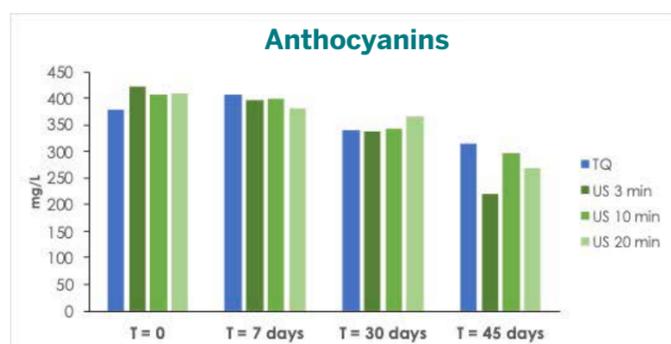


Figure 8. Evolution of anthocyanins content, color intensity, polymerized pigment index and HCl index during 45 aging days of untreated (TQ) and sonicated Merlot wines, at different sonication times (t_{us} = 3, 10, and 20 min)

Figure 5 shows the optical densities of untreated and sonicated samples of Amarone wine at the end of maceration time. Ultrasound treatment induced an increase of all the considered parameters. Generally, ultrasounds lead to enhancements of the extraction processes by a combination of several mechanisms: fragmentation, erosion, sonocapillary effect, sonoporation, local shear stress, and detexturation (Chemat et al., 2017). All of them induce a cell structure breakdown and higher mass transfer rates, leading to higher extraction yields and efficiency. Sonication treatment was carried out also on Lagrein grapes and several analytical parameters were considered (Figure 6). The sonication of Lagrein grapes didn't affect the polyphenol content, oxidability index, and color intensity, but with 50% of the maceration time, compared to the untreated sample. Moreover, a significant increase of anthocyanin compounds was highlighted. A sensorial analysis was also performed on Lagrein wines, obtained from untreated and soni-

cated samples, in order to evaluate some possible effects on organoleptic perceptions (Figure 7). As reported, the wine obtained after sonication treatments were evaluated as less bitter and astringent, compared to the conventional one. This result could indicate an effect of ultrasound irradiation not only on extraction mechanisms but also on chemical properties of some polyphenol classes, as tannins. Ultrasound could promote certain chemical reactions, render chemical and structural changes in wine that resemble those occurring after long periods of natural aging (Garcia-Martin & Sun, 2013).

3.2.2. Wine Treatments

In view of the results from the previous maceration trials, an ultrasound treatment was performed at a fixed amplitude (100%) and different times (3, 10 and 20 min) on a Merlot wine. Anthocyanin content, color intensity, polymerized pigment index and HCl index were monitored during the first 45 days of aging (Figure 8).

Sonication treatment carried out for 3 minutes, induced a better evolution of all the analytical parameters: higher decrease of anthocyanin content, and higher increase of color intensity, polymerized pigment index, and HCl index. An increase of sonication time up to 20 minutes, which is considered as a boundary condition, didn't highlight other positive significant changes and few minutes of sonication are enough to induce positive effects of the considered parameters.

Wine aging is a long-term process during which several chemical reactions of polyphenols can occur, such as polymerizations, condensations, and others. Long aging periods are sometimes incompatible with the consumers' requirements and it represents a high cost for wineries. Several actions should be considered to accelerate the vinification processes and to ensure the quality of the wine at the same time. Ultrasound is regarded as the most promising technique for accelerating the wine aging process, specifically

considering its effectiveness on changing the chromatic characteristics and phenolic properties of red wines (Garcia-Martin & Sun, 2013). The high localized temperature and pressure, created by acoustic cavitation, induce the formation of reactive radical species, which enhance the reaction rates of existing processes or starting new reaction mechanisms (Kentish & Ashokkumar, 2010).

CONCLUSIONS

The effect of ultrasound, during different steps of the red winemaking process, was evaluated at laboratory and pilot-scale, at different amplitudes and sonication times.

Ultrasound treatments at laboratory scale preserved the initial phenolic compounds and no changes on anthocyanin profiles were highlighted. It is fundamental to optimize the operative conditions, such as amplitude and time, not only to optimize the polyphenol extraction but also to avoid degradative phenomena induced by acoustic cavitation.

Instead, the pilot-scale trials showed an increase of extraction processes and a potential decrease of maceration time between 40-60%. The decrease of maceration time has several advantages and it allows a potential decrease of microbiological risks, which are promoted by long contact time with solid grape fractions. A less contact time with grape seeds could also induce a decrease in tannins extraction and astringency perception.

Moreover, pilot-scale experiments on finished red wine showed potential positive effects also on some chemical reactions involved during the wine aging process.

Ultrasound can be considered as a sustainable technology that can be applied on the maceration step, to increase the extraction of grape compounds and reducing times, with several economic and management advantages for wineries. The sonication treatments should be opportunely modulated considering several factors, such as grape variety and oenological aims. Ultrasound could be an alternative technology to be applied in several steps of winemaking processes, from maceration to wine aging, but more detailed research is needed, and some of them are already underway.

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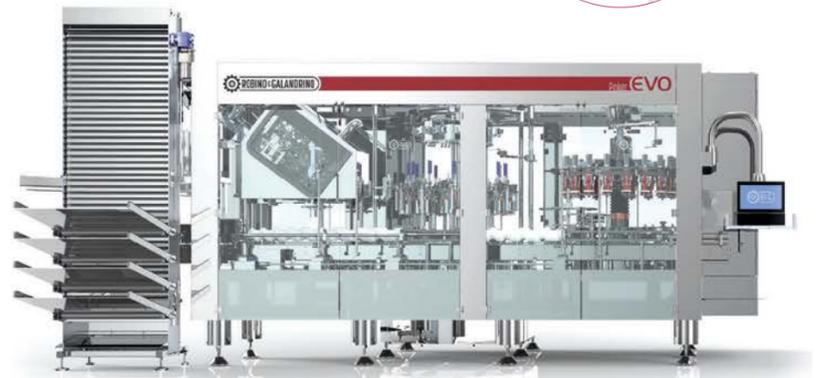
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Zenith EVO



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 poly laminate 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).
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- 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.



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.

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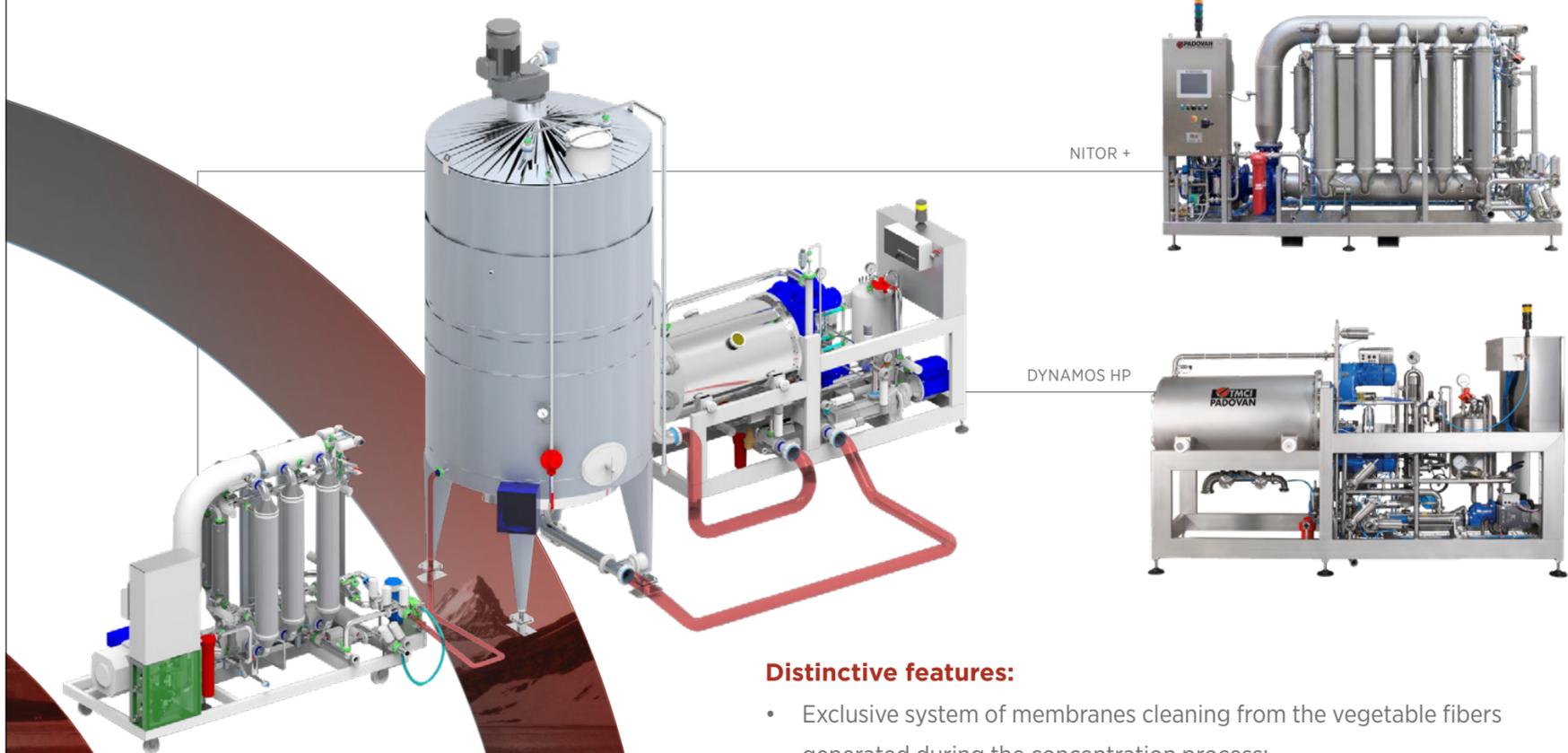
The perfect couple for crossflow filtration of both sediments and wine!

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NITOR +, equipped with either PES or PP polymer hollow fiber membranes or ceramic tubular membranes, fully assembled in-house, with the exclusive interchangeable 8" modules and **DYNAMOS HP**, in a high-performance version with new monolithic vitreous-ceramic discs, which allow mechanical resistance and significantly increased yields, are now combined to offer maximum results!

A perfect combination:

- Pre-concentration of sediments with static cross flow and final concentration with dynamic crossflow and recovery of very high-quality filtrate;
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- Both filters do not require any glycol or cold-water cooling system;
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- Very low energy consumption.

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and multiplies success!**

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Il Corriere Vinicolo's Digital Newspaper Library Is Online

The collection includes all the issues of Unione Italiana Vini's weekly newspaper, starting from the first issue dated December 1st, 1928. It is a chance to retrace the history of Italian wines, as well as the history of Italy



Corriere Vinicolo front page, issue 29 from 1963

The Corriere Vinicolo's newspaper library is one of the most remarkable portions of Unione Italiana Vini's documentary and book heritage, with particularly important historical interest recognised by Lombardy's Archival and Bibliographical Superintendency, an office that is part of the Ministry of Cultural Heritage and Activities. The Italian term for newspaper library, "emeroteca," indicates an ordered collection of newspapers and periodicals for consulting or reading. The word consists of the union of the Greek words *héméra* (day), indicating the word "journal," and *-teca* (custody, collection, deposit). The term entered the Italian language via the French term *hémérotèque*. The collection gathers all the issues of Il Commercio Vinicolo and Il Corriere Vinicolo, starting from the first issue, dated December 1st, 1928. The

weekly newspaper, the Unione Italiana Vini's press service, was founded under the name Il Commercio Vinicolo by Arturo Marescalchi (1869-1965), who was also the first editor in chief. The newspaper changed to Il Corriere Vinicolo in April 1950. The new name followed on from a radical evolution of the Unione Italiana Vini, which by that time had transformed its membership base and representative functions to become an association not just of businessmen (as it had been at the start in 1895), but of producers, industrialists, representatives, technicians and associations. Unione Italiana Vini had become an association to represent the whole Italian winemaking economic cycle, and so did its press service, starting with the name.

The History Of Italian Wine And Of Italy
Leafing through the pages of the weekly journal, you can

retrace the history of Italian wine and, beneath the surface, that of Italy. In over ninety years, Il Corriere Vinicolo has tackled topics like propaganda and enhancing "typical wines" and, later on, it mapped out the path towards the emission of the first Presidential Decree 930/1963, which really gave Italian wine the first effective "rules for the protection of the designations of origin of musts and wines." Then it worked towards the subsequent Law 164/1992 for almost thirty years,

which managed to consolidate and give a new slant to a sector projected towards important quality and quantity objectives, and then the evolutions of all the Italian wine rules, up to the most recent laws issued in Italy, while keeping a constant eye on what was and is happening on a European level and in third countries. We also find the narration of "recurrent crises" as well as recoveries, occurring after scandals and "wine wars." We can read about transport and trade,

winemaking and vineyard techniques, history, literature, conferences and occasions for producers, scholars and politicians to exchange ideas, fairs, exhibitions and events, about the important role carried out by professional associations and protection consortia, about wine and health, wine and food, wine tourism, recycling winemaking by-products and sustainability. The collection of all the issues of Il Corriere Vinicolo is available today at Unione Italiana

Vini's Archive and Library, at the Milan premises, as well as on the web page 'Emeroteca digitale del CV' (CV's digital newspaper library). All the issues of the weekly newspaper have been made available digitally to protect the original copies, which are a cultural heritage under the protection of the State today. The operation is part of a wider project to protect and valorise IUV's Historic Archive and Library.

Francesco Emanuele Benatti

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Unione Italiana Vini



Corriere Vinicolo



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OLIVIER CHADEBOST

A “haute couture” architect, an hard-to-please aesthete

“Make your life a dream and the dream a reality.” These words from “The Little Prince” by Antoine de Saint-Exupéry could perfectly sum up Olivier Chadebost’s path to becoming an atypical architect, an engineer, designer and creator of the graphic identity of brands. Chadebost tackles every project with the ability to combine technical functionality and a strong aesthetic connotation, thanks to constant attention to precision and favouring exclusively unrefined materials.

“I set up my agency 20 years ago and now we have four business units,” he said. “The Bordeaux branch (as well as those in Paris, *Ed.*), nicknamed as ‘Esthète and Wine,’ works in the world of wine and the environment. Hotels, restoring castles, designing cellars and wine tourism structures in the widest sense of the term.”

As part of his activity in the wine sector, Chadebost designed Château d’Yquem in Sauternes, Château Cheval Blanc, La Gaffelière, Château Montlabert in Saint-Émilion, Beauregard in Pomerol, Lafon Rochet and Lafitte-Carcasset in St. Estèphe, just to name a few of the properties in the Gironde. Other projects are being conducted in Chile, India and also Italy. The latest activity is retail and luxury homes.

“One of the features of our structure is that we don’t limit ourselves to architecture,” he explained. “But we work on a brand positioning strategy. We look for its core business and create all the architecture, engineering and design around it. We always start with a blank page. Our initial data for Château Montlabert, for example, consisted of a map of the soil and one of the terroir, then we added our technical expertise to define a project strategy together. We work on the graphic identity defined together with the client, to guarantee overall coherence between a label, a bottle, a logo and a winemaking room.”

Architect Olivier Chadebost designed the new cellar of Château Montlabert, owned by the Castel group since 2008, in the heart of the Saint-Émilion vineyard, a UNESCO World Heritage Site. This “haute couture” building of 4,500 m² with an essential style and design, is the result of the desire to follow the latest innovations in the field of winemaking, but also to develop the winery’s visibility. In the words of the architect, his vision of the project

Château Montlabert

A NEW “CUVIER” MARKS THE REBIRTH OF THE CRU

by JULIANA CAMUS



Top left: Olivier Chadebost in the reception of Château Montlabert

Above: The new winemaking area where the tanks are gathered around a kind of island, with a walkway where visitors can admire the cellar without interfering with the technicians’ work

Photo bottom next page: The enormous glass roof of the “cuvier”, which lets natural light enter and favours natural ventilation. Designed like the roof of a yurt. The optical effect recalls the design of the famous gun barrel from the 007 films



Grape Selection And Gravitational Winemaking

In compliance with an extremely meticulous vineyard management, at Château Montlabert they wanted to combine an approach aimed at the separate vinification of grapes from individual vineyard plots with some of the most advanced winemaking techniques. In the new *cuvier* (winemaking area), the grapes arrive in a special space and are then transported to a small area via vats without lifting pumps, getting at the tanks simply by the force of gravity. The architect explained the two challenges that the owners entrusted to the design.

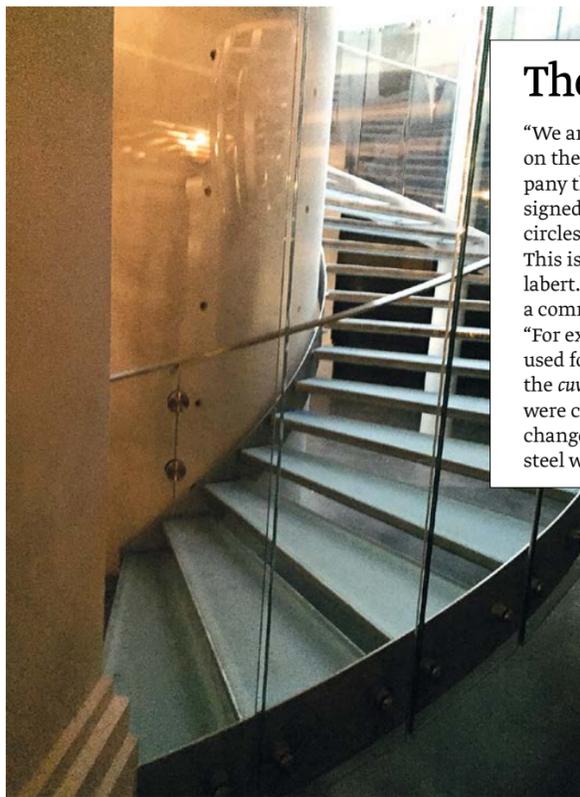
“We opted for gravitational winemaking, letting the grapes fall into the tanks and carrying out the grape selection on a part of the level,” he said. “In the tank room, designed by the Italian company Defranceschi - Sacmi Group, we follow the concept of a ‘green winery’ with very efficient energy consumption. Thus we favoured an exchange with the exterior, to get the best possible natural light. Then we worked on getting a perspective that allowed you to see from one space to another, so that we can see both the exterior of the grape harvest area with a view of the upper part of the tanks, as well as a glimpse of the staircase that leads to the barrique room.” (See photo of the barrel room on the next page)

As for the winemaking area, “We gathered the tanks around a kind of island,” Mr. Chadebost continued. “Creating a sort of walkway where visitors can admire the cellar without interfering with the technicians working in the space surrounded by tanks, a bit like a clockmaker in his workshop. In our philosophy of a tailor-made design. We reduced the visible pipes to a minimum, integrating them into the upper part of the tanks so as to enhance the design without compromising the functionality of the technical instrument.” There are two barrel rooms: one for even years and one for odd years. This means we can avoid pumping over during ageing, with a constant effort of precision.

Château Montlabert is a splendid nineteenth-century charterhouse surrounded by a park of centuries-old trees. Situated on the road to Libourne (a municipality in the Gironde, not far from Bordeaux), with its 17 hectares, it is one of the gems of Castel Châteaux & Grands Crus, which unites the Castel family’s properties scattered over four regions (Bordeaux, Languedoc, Provence and Loire). Architect **Olivier Chadebost** designed the new cellar for this beautiful estate, lying at the heart of the Saint-Émilion vineyard, a UNESCO World Heritage Site. It is a “haute couture” building of 4,500 m² with an essential style and design, perfectly integrated into its environment, the result of the desire to follow the latest innovations in the field of winemaking, but also to develop the winery’s visibility.



The design followed two main currents: the idea of a small cask and the kinetic effect. It is a repetitive element that adds dynamism and movement to the architecture. We find it again, for example, in the staircase (here on the right) with its concrete steps or on the tanks where we interpreted the tilting constraints by turning the tank over to obtain the effect of a ship's bow."



The Collaboration With Sacmi-Defranceschi

"We are the ones who choose the companies we work with," Olivier Chadebost said. "Because we can count on their competence. And the choice fell to Defranceschi - Sacmi Group because we were looking for a company that is able to combine technical audacity and aesthetics with competitive prices. For example, I designed the lighting and Sacmi, well-known for its know-how, created the ceramic staves, the stainless-steel circles, the glass; the stairs were made by Italian artisans... Everyone gains from their partner's know-how." This is how **Olivier Chadebost** describes the choice of technical partners for the work at Château Montlabert. And this project, in chronological order, is the latest link in an ongoing collaboration, which has found a common purpose in sharing codes that join the world of luxury and haute couture with the wine world. "For example, to create the winemaking areas of Château d'Yquem we used stainless steel that is usually used for the external architecture of buildings; and for the *cuvier* of Château La Gaffelière in St. Emilion, tanks were created in midnight-blue stainless steel which changes colour depending on the light, with a curved steel walkway on top."



SACMI AND DEFANCESCHI'S INCREASINGLY CUTTING-EDGE KNOW-HOW

In the photo, from the left: Emanuele Mazzini, CEO of Defranceschi, Giulio Mengoli, General Manager of Sacmi, and Laurent Guillemain, Sales Director of Defranceschi



The barrel room, with its unusual lights designed specifically to recall barriques

An All-round Quality Approach

The policy of the ownership is to only make wine from the best grapes grown in vineyards covering from 12 to 15 hectares, in order to enhance quality to the full.

"This approach geared towards the best quality of every single aspect is applied to the whole project where we only used unrefined materials: concrete, stainless steel, cork," Olivier Chadebost explained. "For example, the lighting apparatus was created bearing in mind the size and light necessary for the work islands. First, we technically designed the apparatus, then we gave it a design reminiscent of the image of a barrique. During the whole process of the project, we followed two main currents: the idea of the small cask and the kinetic effect. It is a repetitive element that adds dynamism and movement to the architecture. We find it again, for example, in the staircase with its concrete steps, or in the tanks where we interpreted the tilting constraints by turning the tank over to obtain the effect of a ship's bow."

A Glass Roof Inspired By The Yurt

In the *"cuvier"*, an enormous glass roof allows a swathe of natural light to enter from the top of the room and reach the floor of the barrique room below. It is a fascinating solution that also encourages natural ventilation.

"Designed like the roof of a yurt (a mobile dwelling adopted by various nomadic peoples), i.e. with metallic elements placed one on top of the other, resting on a central circle of stainless steel and glass, a system that tolerates high amplitudes of expansion," the architect said. "This high visual-impact covering also guarantees a suitable thermal effect together with the 'chimney' created by the staircase that regulates the humidity of the room and the ventilation of the upper floors."

Another "surprise" optical effect of this covering recalls the famous opening sequence of the James Bond films.

"When the sun is a little higher in the sky," Mr. Chadebost said, inspired by his passion for cinema. "This radiant form casts a shadow on the cylindrical element, thus creating the same design as the famous 'gun barrel' of the 007 films⁽¹⁾."

Next to the tank room the architect designed a room for displaying bottles.

"We picked up the kinetic effects of the vertical staves of the barrels, using small stone tables reminiscent of the calcareous St. Emilion plateau," Mr. Chadebost commented.

The work of the architect, who also looked after the winery's new graphic identity, always favours the overall consistency of the project and also aims to enhance the ensemble of elements of the property - the nineteenth-century charthouse, the hunting pavilion and old orangery and a building at the entrance of the estate - with the creation of garden with a rose garden. The aim is to be able to welcome clients and professionals in areas intended as a real family house and not as a production unit.

"We will give back an identity to this house that will act as a warm place to welcome visitors," he added.



⁽¹⁾ Gun barrel, the famous opening sequence of the James Bond films

"On 7 September 2019, we celebrated our centenary with all our employees. It was a great family party. Then on 28 November, we organized a huge event with all of our clients, inviting Oliviero Toscani, who created the photographs that narrate 100 years of our group through images, and the American economist Jeremy Rifkin, with whom we have launched ourselves into the next 100 years."

Giulio Mengoli, General Manager of Sacmi, starts off by remembering the important anniversary of the company celebrated over a year ago, but which lingers in the memory as an extraordinary event from various points of view. Sacmi's history, in fact, began on December 2, 1919 in Imola, with a cooperative of nine workers. Over time, the company grew to become an international group with 4,500 employees in 80 different companies all over the world today, with a turnover of 1.4 billion euros. It is a company deeply committed to social issues in the territory it works in, but it does so much more, from funding screening equipment for Imola hospital to supplying schools in the city with computers (as well as their maintenance with internal personnel) or their contribution to the school canteen for disadvantaged children, as well as donations on a national level for natural disasters. Sacmi is also responsible for the creation of Imola's Museum of Technology.

"Our company is deeply embedded in the social fabric of the city," Mr. Mengoli proudly pointed out.

Along the way, in August 2016, Sacmi took over the Defranceschi company situated just four km away.

"For us it was important to support a local company and at the same time expand our presence in the food and beverage sector through its most luxurious component, wine," Mr. Mengoli said.

Through Sacmi's Wine & Spirits Division, with the Defranceschi brand (tanks and presses), Sacmi Verona (Kube labelling machine), Sacmi Packaging (BIB solutions, bottling lines, etc) the group has invested in the wine world and enhanced its skills with the aim of offering the wine sector complete and integrated solutions, through to "turnkey cellars", without forgetting the know-how of the group in terms of engineering, architecture and automation of plants.

In particular, Defranceschi, with a turnover of 20 million, integrates the supply of the group with highly-patented technical solutions and associates Sacmi's history to its range of products. For example, the monumental lights created for Château Montlabert (see article) mark a return to its origins, inspired by the model created by Sacmi 100 years ago and combining the two materials stainless steel and ceramic in a single creation. And though the company aims for the top of the range, it also offers more economical tanks, a bit like prêt-à-porter compared to *haute couture*.

Three strongpoints of the Group that Managing Director Mengoli pointed out: the employees' deep attachment to their profession and company, the level of skill and Sacmi's ability to manage a portfolio of technologies and products as vast as it is varied.

"This company has a great ability to create synergy between the different lines of business and different markets where they are applied," Mr. Mengoli said, pointing out there are over 2000 patents pending at Sacmi. "We always see lots of enthusiasm among our employees when we adapt technology to one sector or another, like ceramic for wine."

In fact, Sacmi has always specialized in supplying technology for using ceramics and today it is investing in research and development and working on the opportunity to insert ceramic inside winemaking tanks instead of concrete.

"Ceramics is a totally compatible material with food," Mr. Mengoli said. "The technology developed by Sacmi enables us to choose the microporosity of the support (through granulometry and firing temperature) to favour the perfect micro-oxygenation of the wine."

Sacmi's research and development laboratory has been working along these lines on behalf of the Defranceschi subsidiary in order to qualify the ceramic compatible with the wine world, going on to win the New Technology award at the last Innovation Challenge at Simeis 2019 with their own patented ceramic tank. The ceramic doesn't influence the sensory aspect of the product and has the same thermal inertia as concrete: features that reconcile well with today's trend to intervene as little as possible in what the terroir offers. It is therefore fundamental to offer wine producers wine-ageing tools that respect the raw materials and the work done in the vineyard.

"Sacmi's know-how combined with Defranceschi's wine culture, offer good prospects for development in this sector with a high added value," Mr. Mengoli concluded. *Juliana Camus*

WINE BY NUMBERS

A PROJECT BY IL CORRIERE VINICOLO



THE FINAL BALANCE OF A YEAR OF COVID-19

by CARLO FLAMINI

SOME GROWING IN THE END. BUT IT'S A -6%

Losses for almost 1.4 billion dollars and volumes in strong decline for the main importing countries. But the year end shows moderately positive signs, giving us hope for the immediate future. The long term is yet a totally different story

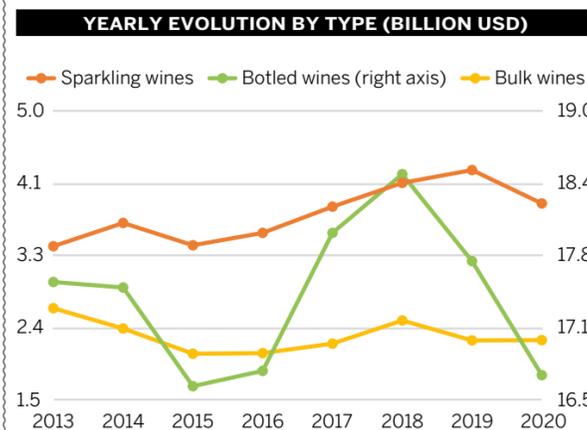
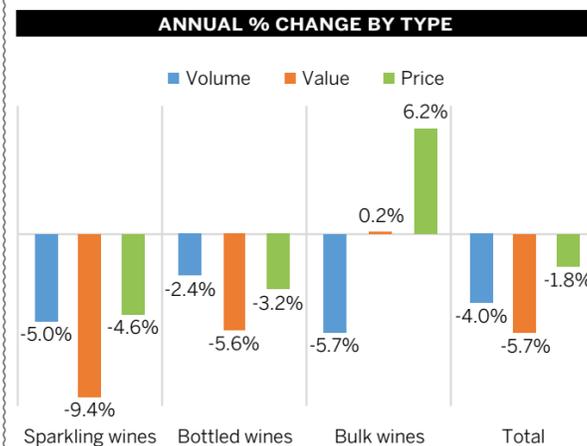


In these pages are some of the 2020 data for the main wine import and export countries, analysed and commented by the Wine Observatory of the Unione Italiana Vini, and published by the Quarterly Report "Wine By Numbers."

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

Losses for just under 1.4 billion dollars and 2.7 million fewer hectolitres of wine. This is the closing balance for the 12 months of 2020, a figure destined to grow further as we are only talking about the aggregate of the main importing countries, monitored as usual by our Wine Observatory.

The Covid pandemic has obviously influenced this strongly negative balance, which inflicted continuous blackouts in supply, especially halfway through the year, coinciding with partial or total lockdowns put in place in various countries. But, to add insult to injury, American duties determined a sharp fall in supply from France, Germany and Spain. There has been a strong decrease in Chinese imports, beginning well before the pandemic and still not realigned to standards of the recent past, as well as the imposition of economic blockades on Australian products, top of the ranking in the list of suppliers to Beijing. This combination of factors led to a very strong limit of commercial outlets, clogged-up supplies, frantic searches for new shores and new (cheaper) channels for products rejected by traditional markets, remixing of mixes, if not actual sensory modifications in order to slip through the US tariff rules (e.g. the case of French wines forcibly taken to over 14%). Obviously, it's average prices that have felt the effects of this turbulence most directly, which have seen a general reduction of 2%, but with peaks of 5% for sparkling wine and 3% for bottled still wine. This data would not be dramatic in itself, if it wasn't for reductions on top of those already suffered in 2019 (the year that discounted the reverse action of the abundant 2018 production). Therefore, today we see a litre of bottled wine quoted at 4.94 dollars, which takes the clock back a couple of years to when it stood at about 4.90, compared to 5.30 in 2018, the highest ever since the far-away year 2013.



Therefore, the clock has gone back and we have to start all over again. But with a starting point - the fourth quarter - which seemed to instil a minimum of optimism compared to the situation halfway through the year. From October to December, trade showed positive indicators (+4% of the overall value). Even sparkling wine was on the up (+2%)

and, burdened by decreases in Champagne, plummeted between April and September, with a 20-25% loss. For bottled wine, after the rock bottom -17% in the second quarter, the year ended with an encouraging +5%, while bulk wine shelved the year on a seesaw, with the end of December at +6% for prices, determined by the news (which turned out to be wrong) of low harvests in Europe.

SPARKLING W. BOTTLED W. BULK W.

WORLD WINE TRADE - 2020

	,000 litres		,000 USD		USD/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
USA	143,478	-6.7	1,257,490	-8.9	8.76	-2.3
UK	140,097	-2.2	757,968	-11.1	5.41	-9.1
Japan	35,435	-19.1	542,531	-21.9	15.31	-3.5
Germany	61,736	-1.1	430,120	-2.7	6.97	-1.6
Russia	46,870	4.2	220,553	2.2	4.71	-1.9
Switzerland	20,851	2.3	202,218	-3.0	9.70	-5.2
Canada	17,646	-3.6	163,108	-4.1	9.24	-0.5
France	27,915	-3.4	103,836	-1.7	3.72	1.7
Hong Kong	2,119	7.4	73,347	16.5	34.61	8.4
China	9,799	-28.1	71,859	-14.5	7.33	19.0
South Korea	5,072	-8.0	46,432	-5.0	9.16	3.2
Brazil	4,947	-19.7	19,097	-31.3	3.86	-14.4
Total	515,963	-5.0	3,888,557	-9.4	7.54	-4.6

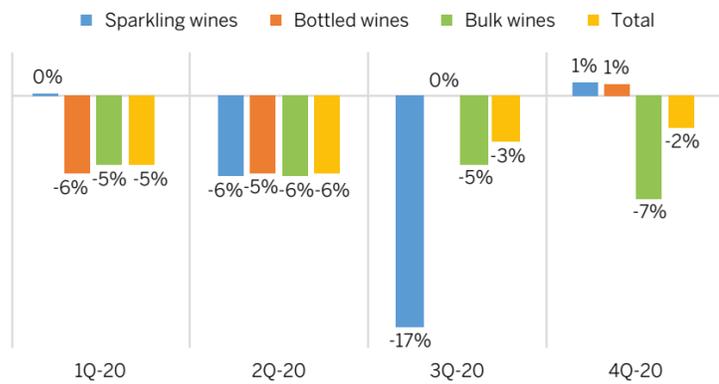
	,000 litres		,000 USD		USD/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
USA	704,295	-3.3	4,020,294	-11.2	5.71	-8.2
UK	686,339	4.3	2,667,991	1.9	3.89	-2.3
Germany	528,314	8.5	1,888,707	8.8	3.57	0.3
Canada	284,798	1.3	1,696,153	1.6	5.96	0.3
China	311,082	-31.8	1,656,335	-25.1	5.32	9.9
Japan	164,513	-7.1	948,674	-7.1	5.77	-0.1
Switzerland	102,243	5.1	947,456	5.5	9.27	0.4
Hong Kong	35,496	-7.2	893,868	-15.4	25.18	-8.9
Russia	280,900	-1.5	852,839	-2.2	3.04	-0.8
France	95,590	-15.1	472,648	-13.8	4.94	1.5
Brazil	145,875	28.9	400,760	17.1	2.75	-9.2
South Korea	44,592	31.9	275,361	35.1	6.18	2.4
Total	3,384,037	-2.4	16,721,084	-5.6	4.94	-3.2

	,000 litres		,000 USD		USD/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
UK	574,343	11.4	775,850	16.2	1.35	4.3
Germany	793,731	-7.9	556,219	-1.2	0.70	7.4
USA	372,021	9.3	311,933	12.3	0.84	2.8
France	485,450	-13.4	271,857	-7.2	0.56	7.2
China	103,778	-24.8	91,618	-36.6	0.88	-15.6
Canada	136,370	24.9	87,514	3.0	0.64	-17.5
Switzerland	49,697	-2.8	74,008	0.3	1.49	3.2
Japan	43,531	-6.1	49,207	-11.5	1.13	-5.7
Russia	24,744	-78.7	15,256	-78.1	0.62	2.7
Total	2,583,664	-5.7	2,233,463	0.2	0.86	6.2

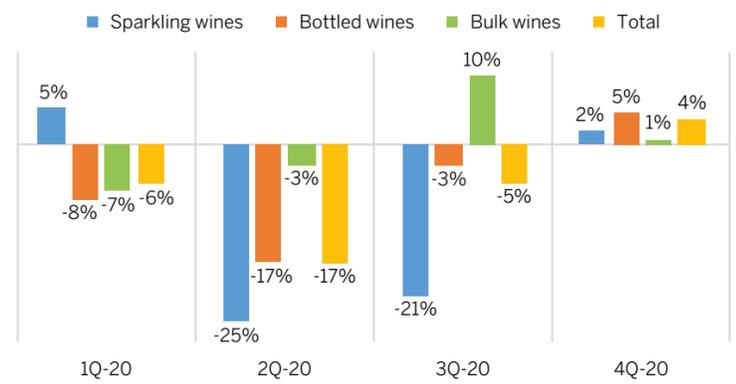
Aggregate total	6,483,664	-4.0	22,843,104	-5.7	3.52	-1.8
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Note: % change compared to the USD. Please check the single countries for different currencies.

WORLD WINE TRADE: % CH. BY QUARTER – VOLUME



WORLD WINE TRADE: % CH. BY QUARTER – VALUE



Bottled Wines

Overall losses year after year have amounted to almost 1 billion dollars (-985 million to be exact), mainly determined by two markets, the American one (-11%, a negative balance of half a million, almost all French brands) and the Chinese one (including Hong Kong), down by 25%, with losses of just under 600 million, determined by all the suppliers, but especially the big ones, like Australia, France and Chile (in this order).

The situation isn't totally positive in Germany, the U.K. or Canada, while it remains critical in Japan. Russia is stable.

Detailing performance by country, the scenario for Italy in USA isn't great, with a zero balance both for volume and value, as well as practically no increase in competitive space compared to the voids left by France (-18% in volume). This shows that Italian wines have led a double life on the market: those for mass retail channels, like Pinot Grigio, have performed relatively well, even in large formats (the stockpiling effect of the pandemic), which hadn't been witnessed for years. Others, for the HORECA channel, had a year which began with high demand (there was even the possibility of inserting them in the list of positive duties), which then deflated during the year, penalized by closures of the channel due to the pandemic.

New Zealand wines, on the other hand, weren't affected by the crisis and continue to stack up uniform growth both in value and volume, which makes them the real winners of the 2020 market.

In the U.K., although facing a new lowering of average prices (-8%), the balance for Italy remains positive in volumes. However, the Brexit scenario has been a real millstone and in the first few months of the year it already gave a taste of what the market has in store for 2021.

The German market is very positive, with purchases pouring into the already strong domestic channel and solid growth for all the main suppliers, even for value, with average prices up by 4%.

China, as we said, marks one of the worst years in its recent history. Between the peak in 2017 (5.5 million hectolitres) and the 2020 data (3.1 million), overall losses of 2.4 million hectolitres, in decline for the third year in a row. The only consolation is the fact that the fourth quarter (with the exception of Australia, formally banned) closed at -28%, after going from -42% in June and -35% in September. A very weak sign of recovery, which has already involved Chile and France.

On the Japanese market, on the other hand, the situation is the exact opposite. After the first six months spent mainly in stability, 14 percentage points were lost from September to December, with a final balance of -7%. This particularly involved European wines, with negative peaks for Italy (-20%), but also Argentine, South African and Oceanian wines, while only Chile remains positive. However, it too had declined in 2019. There would appear to be a phase of general rebalance, after the euphoria of the FTA, which

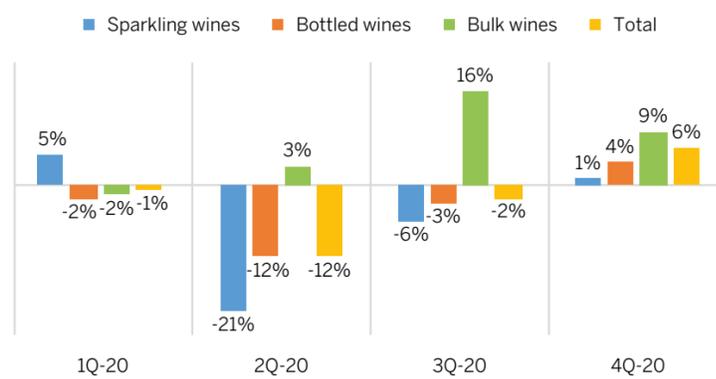
probably led to buying a bit too much wine from European countries free from duties.

A glance at the Canadian market, which closed mainly with a stable figure, produced by the positive balances of the USA and France and the negative ones of Italy and Australia. The stability of estate-bottled wine, however, should be looked at together with the marked growth of the bulk wine market, with strongly increasing demand from USA, Chile, Argentina, France and Italy, wines "blended" with Canadian ones and then served on the market as value-priced International blends, obviously far more in demand by consumers during economic restrictions due to the pandemic.

A final note on Russia, which after four years of continual recovery sees a setback for total imports. However, -2% in a pandemic year is nothing irreparable on a market that has basically returned to pre-crisis levels.



WORLD WINE TRADE: % CH. BY QUARTER – PRICE



Sparkling Wines

As we mentioned at the start, the sparkling wine segment is the hardest hit by the economic effects of the pandemic. In terms of exports, Champagne has plummeted, with a drop of -20% in value over the year, but with peaks of over -30% halfway through the year. The decline in shipments of this product has obviously had an impact on the value curve of the sparkling wine category which, compared to the volume column, has seen the net contribution of products with lower added value, like Prosecco, which recorded significant increases in consumption determined by the shift from the HORECA channel to off-trade.

The temporary blackout of American imports recorded in the third quarter of the year has entered the already lean general balance for sparkling wines, and ended up weighing down all

the rest, bringing it to -17% in volume and then recovered with great effort at the end of the year. Let's start with the United States which, though down by 7% in volume and 9% in value, proves to be the first import market with a value of 1.3 billion dollars. The fourth quarter saw an improvement in the French situation, reaching a growth (+10%) after an average of -40% between April-June and July-September. On the other hand, there was a regression for Italian imports, which went from +10% at the end of June to -25% in September and -6% in December, with a final annual balance of -3%. For Italy, it was the first halt in continuous growth since 2009. Spanish sparkling wine was also in strong decline, closing the year at -20%, also in this case cut down by dynamics linked to closures in the on-premise segment.

The second world market, the United Kingdom, was also negative, clearly determined by the French decline (-30% annually, but recovering in

the fourth quarter like the US market, after -60% from January to June), as well as the seesawing Italian performance, with the fourth quarter seeing half the decline of the third one (+7% compared to +14%) and a final annual balance of +5%.

Japan had a negative scenario, closing at -20% for the year, leaving all the large suppliers empty-handed, with the peak for France and Italy below 20% or more. The German market was stable, with increases only for Italian wines, compared to fairly marked reductions for France and Spain. Remaining in Europe, Switzerland and Russia were positive, although the French beat a retreat in Moscow in the face of growing Italian, Spanish and particularly the cheaper Moldovan wines, which increased more than tenfold.

Canadian growth, on the other hand, has died out, not only for France (-8%), but even more so for Italy (-2%), which had been gradually building up a small-large market for its sparkling wines since 2001. Obviously this all needs to be seen in the context of an anomalous year, with a solid market destined to take off once again as soon as the economic situation has recovered. To compensate for this, at least for Italian sparkling wines, the French market remains, closing at +9% in volume, marking the fifth consecutive increase since 2016, with a historic record of supply, at 175,000 hectolitres. All of this against a background of reduced consumption of French, Spanish and German sparkling wines, which denotes that love for Italian bubbles is more than just a flash in the pan.

Some Scenarios

Before commenting on the different wine types and the main importing countries, let's try to sketch a minimum scenario, at least for the medium term, starting with the question. What legacy has Covid left?

As regards distribution, even more power has been handed to the retail channel than it has had up to now. But traditional retail (brick-and-mortar businesses) knows that it is no longer alone today and faces a rather hefty challenge: the collusion and development of the digital segment, its own one (where, at least in Italy, things are not so advanced as in other countries) as well as specialized platforms, which have realized that a large number of people have passed through and may continue to pass through their websites. The wineries themselves have tasted the chance to explore forms of digital trade, even their own, in view of shortening the distribution chain as well as directly managing the wealth that the digital era produces: data.

Data will probably be where a tug of war will occur between production and distribution. If, to date, the wine industry has delegated contact with the end customer to third parties (the distributor, specialised press), tomorrow, those who thanks to "responsive" technology will be able to build their own reliable database will not only have an advantage over their competitors, but will also be stronger in negotiations with buyers. Certain and advanced knowledge of "their" consumer will be a distinctive element with which to guide production and especially commercial reasons, taking the entitlement to the final choice of what to produce, where to distribute it and how to sell it more and more upon themselves. In fact, taking away a service share that is totally delegated (and paid) to trade today.

Trade will be called on to accept the same challenge, especially retail, driven by the innovative force of native digital platforms, and, why not, also the evolved sector of certain restaurants, or rather those restaurants that will survive the Covid experience that already show retail-style logic and attitude.

Therefore, the shift in thought and action on an immaterial level (who are those I sell to, how can I get to know them to intercept them), before a material one (what must I produce to be up-to-date) will be a kind of watershed between wineries that will continue to work "as we have always done" in a world that looks in a diametrically opposite direction, and wineries that (although finding it difficult to balance the books) will feel compelled to invest in advanced digital processes which enable them to realign to the point of view above. The groove between large and small with which we have learned to divide the wine world will be replaced by another deeper one: who stores and manages data autonomously and who gives them up to others, to then buy them back at a high price, even though they produce them themselves.

BOTTLED WINES

United Kingdom

	,000 litres		,000 Pounds		£/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	138,028	8.3	637,932	-2.8	4.62	-10.3
Italy	159,904	2.6	326,641	-5.3	2.04	-7.6
Spain	94,688	3.7	209,905	11.5	2.22	7.5
New Zealand	38,791	1.7	163,668	1.7	4.22	0.0
Chile	55,643	9.1	152,553	13.1	2.74	3.7
Australia	43,307	18.1	117,231	33.6	2.71	13.1
Germany	55,402	-9.6	113,941	-9.4	2.06	0.3
Argentina	26,357	1.1	76,437	0.5	2.90	-0.6
South Africa	27,192	-6.3	69,313	1.5	2.55	8.3
Portugal	20,491	33.4	67,598	11.9	3.30	-16.1
USA	5,021	-6.4	46,932	-1.6	9.35	5.2
Others	21,513	5.1	91,794	-7.5	4.27	-12.0
Total	686,339	4.3	2,073,944	1.2	3.02	-3.0

Germany

	,000 litres		,000 Euro		Euro/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Italy	237,011	9.7	777,345	14.3	3.28	4.2
France	104,050	4.5	360,592	-3.8	3.47	-8.0
Spain	79,046	7.8	202,347	3.4	2.56	-4.1
Austria	26,224	23.3	57,731	11.5	2.20	-9.6
USA	12,125	20.8	48,990	8.6	4.04	-10.1
Portugal	15,316	10.5	46,474	9.0	3.03	-1.3
South Africa	14,510	-6.1	43,811	-3.8	3.02	2.4
Australia	6,873	1.9	24,073	2.7	3.50	0.7
Chile	6,885	-6.9	22,618	-9.3	3.28	-2.6
Greece	8,319	2.0	18,616	4.3	2.24	2.2
New Zealand	2,071	-3.0	9,920	-13.6	4.79	-11.0
Argentina	2,569	-10.1	9,897	-16.3	3.85	-6.9
Hungary	4,397	23.5	6,637	17.0	1.51	-5.2
Switzerland	177	-53.1	1,825	-23.4	10.29	63.4
Croatia	453	-13.9	1,384	-9.1	3.05	5.6
Turkey	348	-34.7	973	-40.6	2.79	-9.1
Moldova	468	-3.6	954	0.4	2.04	4.2
Others	7,471	58.9	17,949	29.2	2.40	-18.7
Total	528,314	8.5	1,652,136	6.5	3.13	3.6

France

	,000 litres		,000 Euro		Euro/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Portugal	28,574	-3.9	87,630	-5.5	3.07	-1.7
Italy	16,677	-15.7	69,813	-16.3	4.19	-0.7
USA	514	-31.7	61,989	-23.5	120.55	11.9
Spain	30,067	-19.5	40,728	-19.4	1.35	0.1
Chile	2,115	-10.9	28,297	3.2	13.38	15.9
UK	1,497	-53.3	25,148	-34.8	16.80	39.4
Germany	7,619	-10.9	23,720	-9.1	3.11	2.1
Belgium	1,519	39.5	9,761	-31.5	6.43	-50.9
Argentina	1,209	-22.6	8,570	-20.1	7.09	3.2
New Zealand	736	-32.4	6,419	-22.2	8.72	15.1
South Africa	550	-23.8	3,264	-31.2	5.94	-9.7
Australia	158	-25.4	2,229	35.1	14.13	81.0
Others	4,354	-29.6	43,921	-14.0	10.09	22.2
Total	95,590	-15.1	411,489	-16.1	4.30	-1.2

Russia

	Litres		\$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Italy	61,585,176	4.6	204,957,986	-0.4	3.33	-4.8
Spain	50,471,538	-6.4	125,172,024	-3.5	2.48	3.0
France	30,097,638	-4.4	125,040,113	-3.9	4.15	0.6
Georgia	40,422,177	-7.0	122,652,369	-11.7	3.03	-5.0
Chile	16,924,384	5.3	45,821,935	2.8	2.71	-2.4
Abkhazia	19,002,278	-12.9	42,101,578	-21.0	2.22	-9.2
Portugal	12,994,896	27.2	38,655,668	35.2	2.97	6.3
New Zealand	5,182,665	50.9	28,089,853	43.7	5.42	-4.8
Germany	6,889,090	4.5	19,109,871	13.7	2.77	8.8
South Africa	6,660,356	0.2	17,794,236	-0.7	2.67	-0.9
Argentina	3,800,837	-1.0	12,886,278	-5.9	3.39	-4.9
USA	2,280,904	13.6	11,959,557	28.4	5.24	13.0
Australia	3,158,269	0.1	11,616,365	3.2	3.68	3.1
Moldova	5,498,639	-1.1	8,915,626	-3.6	1.62	-2.5
Serbia	4,671,116	-7.1	7,788,022	-13.3	1.67	-6.7
Armenia	1,669,059	-26.2	4,629,649	-30.7	2.77	-6.0
Azerbaijan	1,161,693	-44.1	2,694,479	-43.4	2.32	1.2
Bulgaria	1,424,797	-24.5	2,302,622	-21.8	1.62	3.6
Others	7,004,700	2.9	20,652,183	2.2	2.95	-0.7
Total	280,900,209	-1.5	852,840,413	-2.2	3.04	-0.8



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BOTTLED WINES

Switzerland

	Litres		Francs		Francs/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Italy	43,582,972	5.4	334,171,888	3.5	7.67	-1.8
France	17,676,777	2.5	253,507,263	-8.0	14.34	-10.2
Spain	16,760,023	5.7	128,346,917	4.2	7.66	-1.4
Portugal	8,288,275	9.5	36,157,713	4.4	4.36	-4.7
Germany	4,361,252	1.3	35,193,398	-4.7	8.07	-6.0
USA	2,333,933	5.8	21,398,498	-7.8	9.17	-12.9
Austria	2,640,696	22.2	19,295,431	3.6	7.31	-15.2
Argentina	2,357,789	-6.8	12,453,542	-15.0	5.28	-8.9
Chile	1,343,102	8.3	7,280,440	-3.7	5.42	-11.1
South Africa	800,844	35.3	6,296,499	23.1	7.86	-9.0
Australia	793,117	-8.3	4,564,794	-30.8	5.76	-24.6
New Zealand	191,316	2.8	1,590,005	2.5	8.31	-0.2
Others	1,112,575	-6.8	20,195,729	-11.6	18.15	-5.2
Total	102,242,671	5.1	880,452,117	-1.4	8.61	-6.2

USA

	,000 litres		,000 \$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Italy	244,612	0.3	1,451,697	-0.1	5.93	-0.4
France	113,597	-18.0	954,440	-29.1	8.40	-13.6
New Zealand	56,984	7.9	415,893	6.8	7.30	-1.0
Australia	82,830	0.4	267,792	-6.8	3.23	-7.2
Argentina	52,547	4.1	243,131	-5.8	4.63	-9.5
Spain	42,785	-8.0	226,630	-10.9	5.30	-3.1
Chile	44,975	-2.2	145,184	-4.6	3.23	-2.4
Portugal	23,689	13.3	111,751	1.6	4.72	-10.3
Germany	15,843	-13.4	61,821	-32.1	3.90	-21.6
South Africa	9,217	10.3	42,676	1.6	4.63	-7.9
Others	17,217	-0.4	99,279	-26.0	5.77	-25.7
Total	704,295	-2.9	4,020,294	-11.0	5.71	-8.3

China

	Litres		\$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Australia	85,223,089	-29.6	672,596,834	-17.2	7.89	17.5
France	88,251,121	-34.6	454,891,044	-29.3	5.15	8.0
Chile	50,063,774	-30.1	189,331,730	-29.5	3.78	0.8
Italy	20,498,604	-30.9	98,235,705	-26.3	4.79	6.6
Spain	34,655,544	-32.5	90,467,817	-31.7	2.61	1.1
Germany	3,256,850	-10.2	19,271,006	-5.5	5.92	5.3
USA	3,087,956	-49.1	19,054,278	-42.2	6.17	13.6
New Zealand	2,039,958	-12.8	18,106,840	-12.6	8.88	0.2
Portugal	4,394,936	-37.3	17,142,565	-27.8	3.90	15.3
Argentina	3,441,542	-22.9	16,149,346	-33.0	4.69	-13.0
South Africa	4,178,206	-35.9	14,664,369	-33.5	3.51	3.8
Georgia	3,722,927	-30.3	13,835,759	-27.8	3.72	3.6
Moldova	3,603,783	-30.0	8,570,904	-27.7	2.38	3.4
Others	4,663,813	-36.5	24,016,718	-47.5	5.15	-17.4
Total	311,082,103	-31.8	1,656,334,915	-25.1	5.32	9.9

Japan

	,000 litres		,000 Yen		Yen/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	45,269	-4.0	44,225,972	-7.1	976.97	-3.3
Italy	28,405	-20.2	15,193,099	-16.0	534.88	5.3
Chile	49,101	4.0	15,075,310	-1.3	307.03	-5.1
USA	6,394	-18.5	11,942,295	-12.6	1,867.65	7.2
Spain	18,899	-8.1	5,739,608	-9.9	303.69	-2.0
Australia	6,033	-3.6	2,667,021	-4.6	442.10	-1.0
Germany	2,719	-21.5	1,490,101	-17.7	548.05	4.9
New Zealand	1,211	-4.6	1,128,145	-6.8	931.25	-2.3
Argentina	1,673	-19.0	862,545	-25.1	515.50	-7.6
South Africa	1,538	-16.6	841,542	-18.4	547.10	-2.2
Portugal	1,598	-9.0	761,638	-6.8	476.75	2.4
Others	1,674	-15.6	1,264,426	-14.4	755.39	1.5
Total	164,514	-7.1	101,191,702	-9.1	615.10	-2.2

Brazil

	Litres		\$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Chile	72,576,501	38.3	176,189,646	21.5	2.43	-12.1
Argentina	22,588,987	36.7	66,287,710	21.7	2.93	-11.0
Portugal	22,615,257	29.1	64,994,790	28.5	2.87	-0.5
Italy	9,646,030	-6.3	32,409,493	-2.4	3.36	4.2
France	5,654,341	6.2	24,856,762	2.3	4.40	-3.6
Spain	7,165,091	23.8	19,782,657	15.9	2.76	-6.4
Uruguay	4,025,166	46.5	10,084,360	27.9	2.51	-12.7
USA	366,584	-31.5	2,119,234	-11.7	5.78	28.8
South Africa	627,150	-42.6	1,701,072	-52.8	2.71	-17.8
Australia	212,595	-39.0	792,051	-34.8	3.73	6.8
Germany	136,989	35.6	503,968	22.1	3.68	-9.9
New Zealand	15,372	-88.5	89,763	-88.4	5.84	0.1
Others	244,908	-8.1	948,801	-24.5	3.87	-17.9
Total	145,874,971	28.9	400,760,307	17.1	2.75	-9.2

Canada

	Litres		\$ Canadian		\$ CAD/Litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
USA	52,670,438	7.0	526,065,558	7.3	9.99	0.3
France	52,887,263	4.4	485,075,967	4.1	9.17	-0.3
Italy	60,856,045	-2.2	465,187,077	0.1	7.64	2.3
Australia	24,875,983	-4.0	171,180,511	-5.2	6.88	-1.2
Spain	20,392,438	3.3	143,452,576	8.2	7.03	4.8
New Zealand	12,963,592	1.4	126,771,133	0.7	9.78	-0.7
Chile	20,751,094	0.4	101,267,918	-2.0	4.88	-2.4
Argentina	13,564,850	-3.0	90,356,431	-2.0	6.66	0.9
Portugal	12,167,577	5.4	74,571,383	6.5	6.13	1.0
South Africa	6,512,516	-10.3	36,452,379	-7.8	5.60	2.8
Germany	3,124,672	-4.8	19,908,769	-5.1	6.37	-0.3
Others	4,031,963	3.5	31,584,219	11.9	7.83	8.2
Total	284,798,431	1.3	2,271,873,921	2.6	7.98	1.3

Hong Kong

	,000 litres		,000 HKD		HKD/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	8,317	-10.9	3,306,491	-0.9	397.55	11.3
UK	1,358	-11.7	1,071,036	-20.6	788.96	-10.1
USA	6,687	33.8	650,748	-36.7	97.32	-52.7
Australia	8,076	0.2	620,512	-6.2	76.83	-6.4
Singapore	1,531	8.3	188,440	0.4	123.04	-7.3
Italy	1,825	-14.0	180,482	34.5	98.88	56.3
China	699	-34.9	129,178	-72.6	184.86	-58.0
Switzerland	41	-85.4	122,858	-31.7	3007.25	368.7
Germany	564	28.9	109,527	-14.8	194.03	-34.0
Chile	1,848	-47.3	71,799	-43.7	38.85	6.9
Spain	1,365	-37.8	70,109	-41.0	51.35	-5.1
New Zealand	953	0.8	69,676	7.9	73.13	7.1
South Africa	233	-22.3	14,129	-14.0	60.62	10.7
Portugal	83	-7.1	4,716	-38.7	56.55	-34.0
Argentina	79	-59.3	4,403	-49.6	55.76	23.9
Others	1,834	4.8	318,526	-30.4	173.66	-33.6
Total	35,495	-7.2	6,932,630	-16.3	195.31	-9.8

South Korea

	,000 litres		,000 \$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	5,740	14.5	61,192	22.7	10.66	7.2
Chile	14,450	28.2	57,810	20.6	4.00	-5.9
USA	4,771	61.4	52,883	63.7	11.08	1.4
Italy	5,890	29.9	41,040	36.8	6.97	5.3
Spain	6,617	22.4	20,555	28.6	3.11	5.1
Australia	3,101	47.5	17,245	52.7	5.56	3.5
Argentina	1,430	48.7	7,214	41.7	5.05	-4.7
New Zealand	800	77.1	6,571	69.1	8.21	-4.5
Portugal	801	207.9	4,249	136.3	5.31	-23.2
Germany	400	24.3	2,284	17.4	5.70	-5.6
South Africa	192	2.8	919	1.7	4.77	-1.1
Others	400	21.7	3,399	19.9	8.50	-1.5
Total	44,593	31.9	275,361	35.1	6.18	2.4

SPARKLING WINES

 United Kingdom

	,000 litres		,000 £		£/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	22,766	-30.5	290,112	-15.1	12.74	22.3
Italy	98,338	5.3	245,172	-10.7	2.49	-15.2
Spain	14,349	35.8	26,648	8.5	1.86	-20.1
Germany	1,188	-57.0	4,434	-37.7	3.73	44.8
Australia	846	-7.1	2,823	2.0	3.33	9.7
South Africa	483	-8.8	2,676	3.1	5.54	13.1
USA	387	9.3	2,003	48.1	5.18	35.5
New Zealand	239	15.2	1,160	18.1	4.85	2.5
Others	1,500	-17.1	10,998	-6.0	7.33	13.5
Total	140,097	-2.2	586,026	-12.2	4.18	-10.2

 Germany

	,000 litres		,000 Euro		Euro/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	20,962	-1.9	237,272	-7.7	11.32	-5.9
Italy	20,851	5.8	84,190	2.2	4.04	-3.4
Spain	18,791	-7.1	45,149	-10.2	2.40	-3.3
Austria	301	-17.0	3,365	18.0	11.17	42.1
Ukraine	320	33.0	1,039	32.0	3.25	-0.7
Others	511	-6.2	2,411	-8.6	4.72	-2.6
Total	61,736	-1.1	373,426	-5.7	6.05	-4.6

 Switzerland

	Litres		Francs		Francs/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	4,595,919	-5.3	106,601,544	-14.9	23.19	-10.1
Italy	12,511,707	3.0	64,914,196	-2.8	5.19	-5.6
Spain	2,384,730	8.1	8,666,826	5.1	3.63	-2.8
Germany	1,103,232	12.2	4,306,169	14.5	3.90	2.0
Austria	104,013	50.3	947,527	25.5	9.11	-16.5
Others	152,308	20.0	2,325,739	-0.2	15.27	-16.8
Total	20,851,909	2.3	187,762,001	-9.3	9.00	-11.4

 USA

	,000 litres		,000 \$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	34,547	-9.2	705,532	-10.0	20.42	-0.8
Italy	87,232	-3.0	451,599	-5.7	5.18	-2.8
Spain	17,940	-18.8	82,466	-14.4	4.60	5.3
Germany	881	-4.9	3,547	-19.8	4.03	-15.7
Australia	370	-27.5	1,892	-26.2	5.11	1.9
Others	2,507	8.2	12,454	-10.3	4.97	-17.1
Total	143,478	-6.7	1,257,490	-8.9	8.76	-2.3

 Hong Kong

	,000 litres		,000 HKD		HKD/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Singapore	571	49.0	220,308	52.2	386.06	2.1
France	665	-18.4	207,206	3.6	311.54	26.9
USA	23	-31.1	19,861	-17.2	873.24	20.1
Italy	379	-1.1	19,699	1.4	51.96	2.5
UK	71	-14.9	15,926	-53.6	223.54	-45.5
Spain	114	43.2	9,166	146.5	80.50	72.1
Australia	68	58.5	6,605	47.7	96.78	-6.8
Germany	18	-21.2	5,730	12.8	320.34	43.3
Others	211	62.2	64,259	11.2	304.76	-31.5
Total	2,120	7.4	568,760	15.2	268.32	7.3

 Japan

	,000 litres		,000 Yen		Yen/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	12,860	-21.9	46,805,055	-24.9	3,639.68	-3.9
Spain	11,456	-9.5	4,929,178	-9.0	430.27	0.6
Italy	6,763	-22.6	3,715,082	-20.9	549.34	2.2
Chile	1,954	-33.3	859,255	-34.2	439.83	-1.4
Australia	1,310	-31.0	660,231	-32.1	504.18	-1.6
USA	146	31.6	277,878	14.9	1,908.31	-12.7
South Africa	109	-36.6	73,290	-33.1	672.78	5.6
Others	840	-0.7	558,489	-0.1	665.03	0.6
Total	35,436	-19.1	57,878,458	-23.5	1,633.33	-5.4

 France

	,000 litres		,000 Euro		Euro/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Italy	17,491	8.8	53,374	3.0	3.05	-5.3
Spain	6,281	-24.3	14,896	-27.6	2.37	-4.4
Germany	3,111	-10.7	7,597	23.1	2.44	37.8
UK	170	53.6	2,598	-2.2	15.32	-36.3
Others	864	-6.3	12,272	-7.1	14.21	-0.9
Total	27,916	-3.4	90,738	-3.9	3.25	-0.6

 Russia

	Litres		\$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Italy	31,948,384	5.5	132,564,496	2.2	4.15	-3.2
France	6,672,295	-12.0	61,491,478	-1.8	9.22	11.6
Spain	5,670,286	6.1	19,235,232	10.3	3.39	4.0
Moldova	746,100	1053.8	1,744,778	1127.9	2.34	6.4
Abkhazia	943,628	-10.1	1,578,688	-38.4	1.67	-31.5
Germany	133,330	114.6	685,487	97.5	5.14	-8.0
Georgia	87,816	-28.2	264,885	-30.2	3.02	-2.7
Others	668,318	43.6	2,989,212	20.9	4.47	-15.8
Total	46,870,157	4.3	220,554,255	2.2	4.71	-1.9

 Brazil

	litres		\$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	1,116,188	-30.7	8,805,571	-37.1	7.89	-9.2
Spain	1,421,655	-1.3	3,871,128	-13.3	2.72	-12.1
Italy	1,524,542	-18.7	3,544,718	-26.0	2.33	-9.0
Argentina	469,547	-38.0	1,304,986	-42.8	2.78	-7.7
Chile	253,225	8.7	775,535	-15.0	3.06	-21.8
Portugal	102,324	-29.1	324,099	-47.8	3.17	-26.4
Others	60,140	-41.4	470,883	-35.9	7.83	9.5
Total	4,947,621	-19.7	19,096,920	-31.3	3.86	-14.4

 Canada

	Litres		\$ Canadian		\$ CAD/Litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	3,400,383	-7.6	96,753,484	-7.4	28.45	0.2
Italy	8,409,070	-2.0	74,160,677	-1.4	8.82	0.5
Spain	2,385,765	-1.7	17,824,167	-0.7	7.47	1.0
USA	613,138	-7.0	8,624,940	-12.9	14.07	-6.4
Germany	1,001,656	-6.8	7,073,089	-5.4	7.06	1.5
Australia	799,589	-0.1	4,997,205	1.5	6.25	1.6
Hungary	486,412	-9.0	2,635,641	-5.2	5.42	4.1
Others	550,626	-1.1	5,448,734	-0.2	9.90	0.9
Total	17,646,639	-3.6	217,517,937	-4.7	12.33	-1.1

 China

	Litres		\$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	1,753,714	-21.4	44,780,021	-7.3	25.53	17.9
Italy	4,358,490	-32.9	15,187,867	-27.8	3.48	7.6
Spain	1,899,840	-19.7	4,539,362	-16.9	2.39	3.5
Australia	879,821	-23.1	4,064,971	-14.2	4.62	11.6
Germany	409,013	-27.5	1,434,319	-22.5	3.51	7.0
South Africa	98,802	33.7	266,108	12.2	2.69	-16.1
Chile	36,879	15.9	178,653	-10.1	4.84	-22.5
USA	3,963	-75.0	50,409	-20.5	12.72	217.5
Argentina	6,516	-61.1	24,994	-77.8	3.84	-43.0
Others	350,908	-49.8	1,331,981	-34.5	3.80	30.6
Total	9,797,946	-28.2	71,858,685	-14.5	7.33	19.0

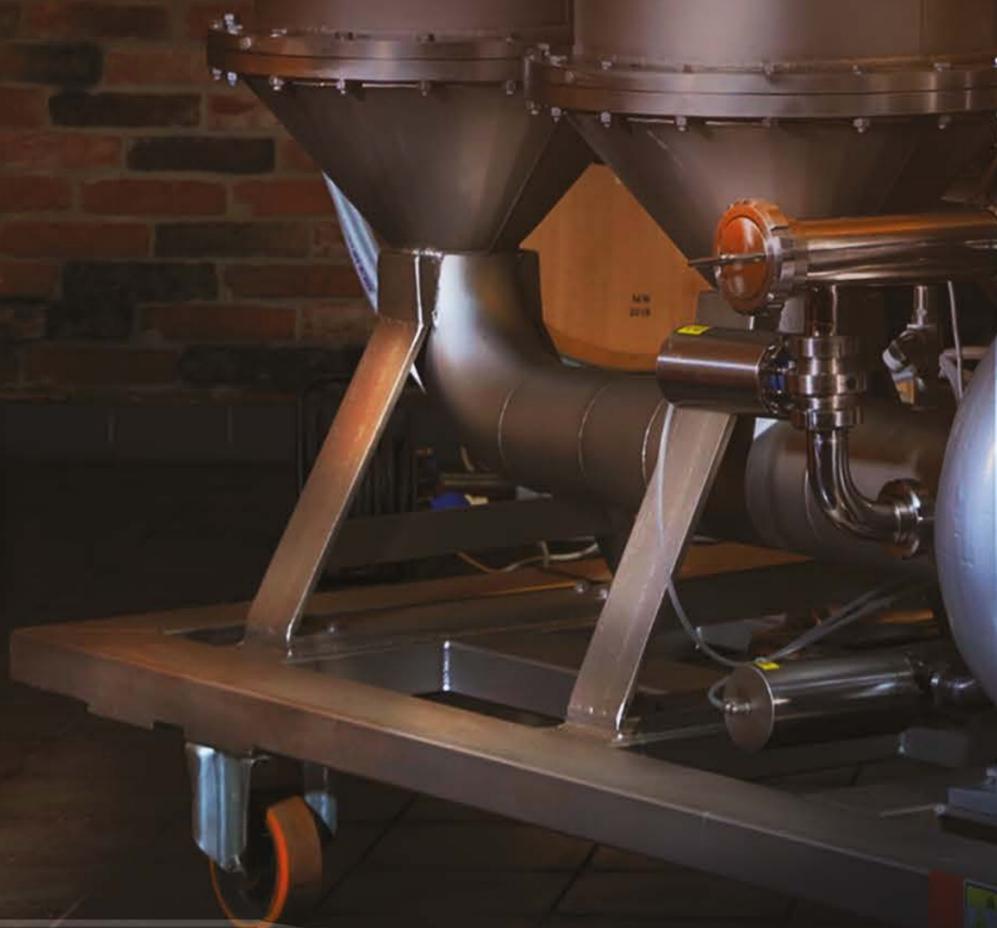
 South Korea

	,000 litres		,000 \$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
France	1,288	6.3	31,569	-3.6	24.51	-9.3
Italy	1,523	-13.5	7,379	-9.3	4.85	4.8
Spain	797	-14.0	2,798	-7.4	3.51	7.7
South Africa	719	-27.8	1,628	-24.3	2.26	4.8
USA	191	67.0	845	35.6	4.42	-18.8
Australia	157	39.7	668	6.5	4.25	-23.7
Chile	132	-3.7	578	-1.9	4.37	1.9
Germany	137	-8.3	474	-11.6	3.45	-3.5
Others	127	21.8	493	6.0	3.89	-13.0
Total	5,072	-8.0	46,432	-5.0	9.16	3.2



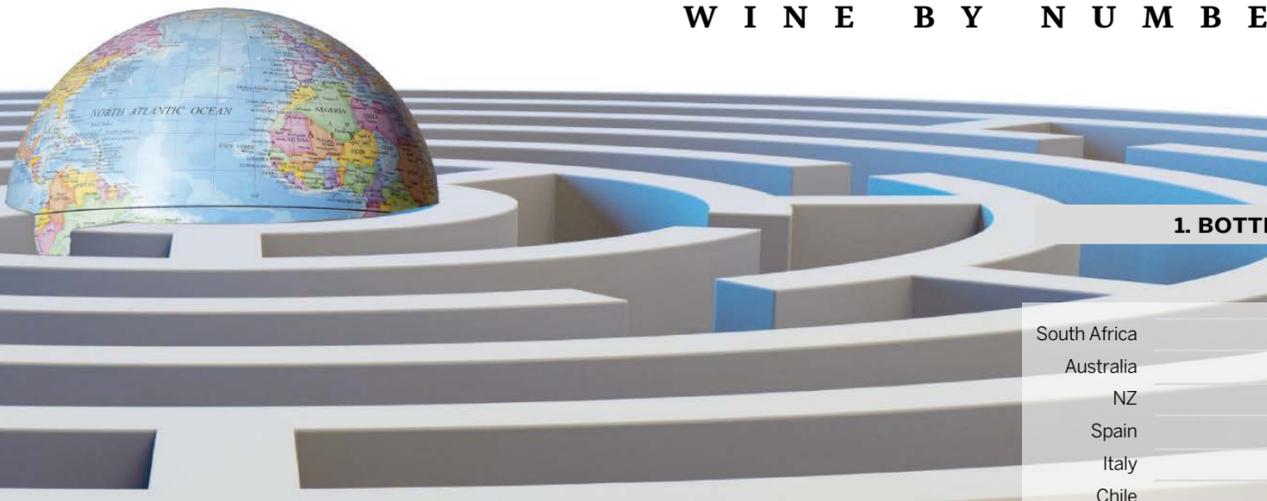
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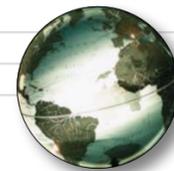
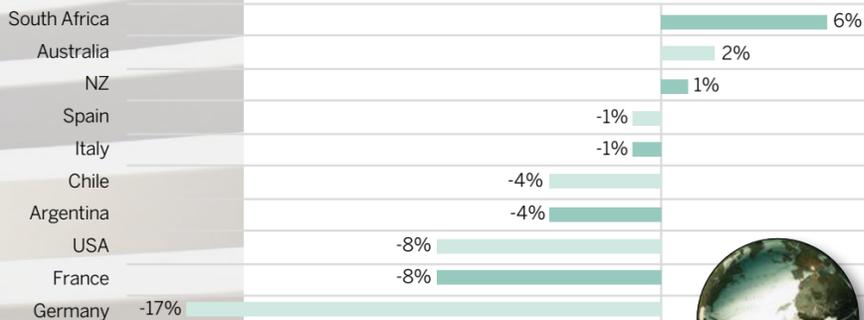


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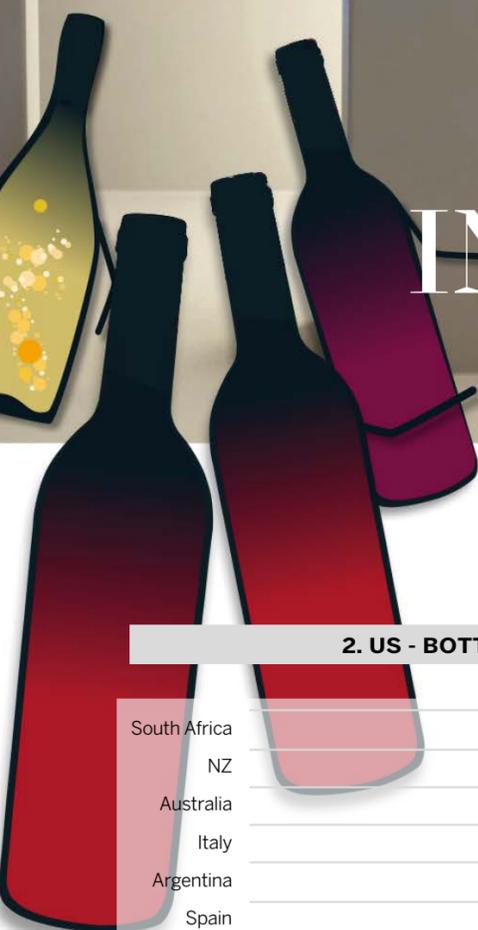


1. BOTTLED WINES - TOTAL EXPORT - % CH. VALUE



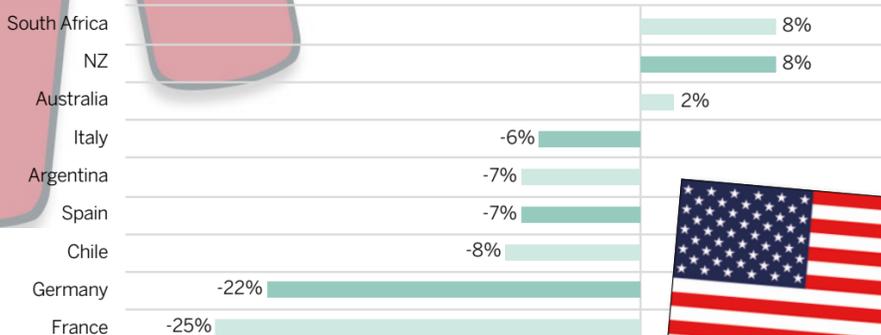
THE 2020 BALANCE SHEET OF THE MAIN SUPPLIERS

IN SEARCH FOR SOME EXIT STRATEGIES



Huge masses of products moved at the last minute from East to West of the planet, with some countries having to give up bottles to put everything in tanks. A black year for sparkling wines

2. US - BOTTLED WINES - % CH. VALUE

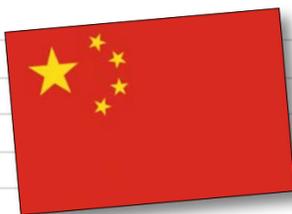
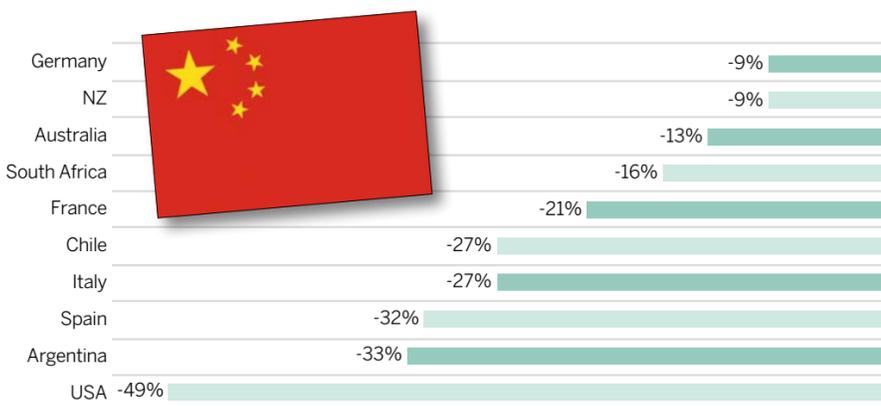


by CARLO FLAMINI

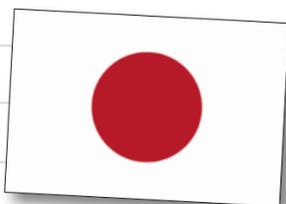
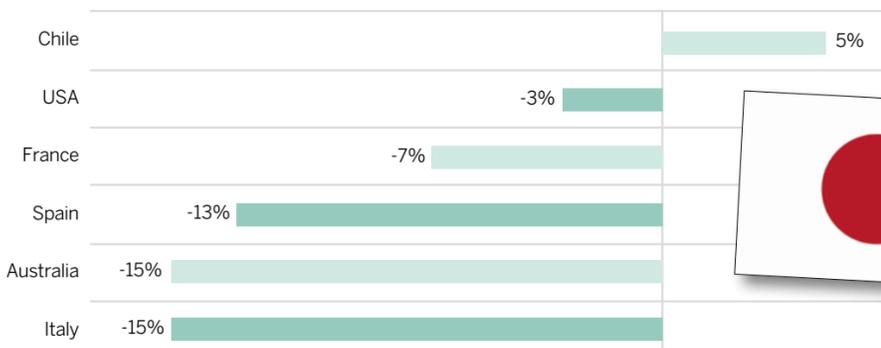
For most of the large exporting countries, 2020 was a very troubled year. In the face of a slight decrease in general volumes (-3% to 46 million hectolitres of bottled still wine), the value component saw strong losses, due to pressure on price lists generated by tariffs applied in USA, the effects of the Covid pandemic and the slowing down of the Chinese economy. The negative signs are therefore significant: from -17% for Germany to -8% for USA and France, -4% for Chile and Argentina and, lastly, -1% for Italy and Spain. Only Australia, South Africa and New Zealand went against the grain (figure 1). In more details, exports towards the U.S. (figure 2) showed strong negative signs not just for France (-25%, with Bordeaux wines at -30%), Ger-

many (-22%) and Spain (-7%), all countries that suffered extra tariffs by 25%, but also for Chile (-8%), Argentina (-7%) and Italy (-6%). Australia shows a positive trend (+2%, which sent products no longer absorbed by China towards the West), New Zealand and South Africa (+8%). The situation is catastrophic in China (figure 3), where the impact of Covid and general economic difficulties during the first half of the year strongly affected shipments, with most suppliers in a negative range between -20% and -50%, despite the substantial recovery in the fourth quarter of the year. The Japanese market was also negative (figure 4), with only Chile showing a positive trend and all the Europeans had a negative trend despite the effectiveness of the free trade agreement with the European Union.

3. CHINA - BOTTLED WINES - % CH. VALUE

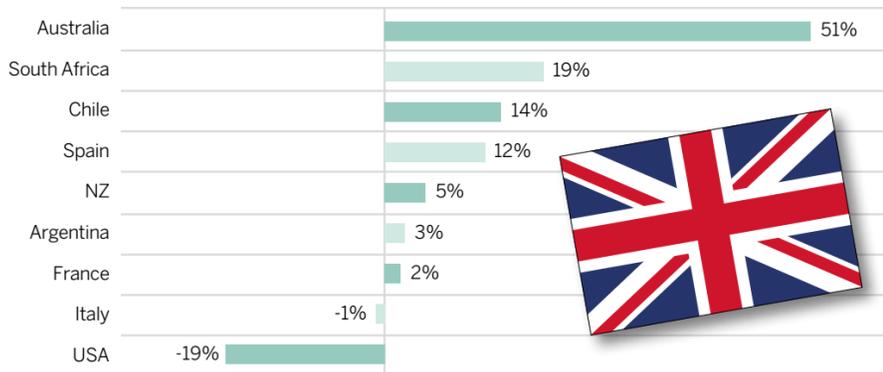


4. JAPAN - BOTTLED WINES - % CH. VALUE

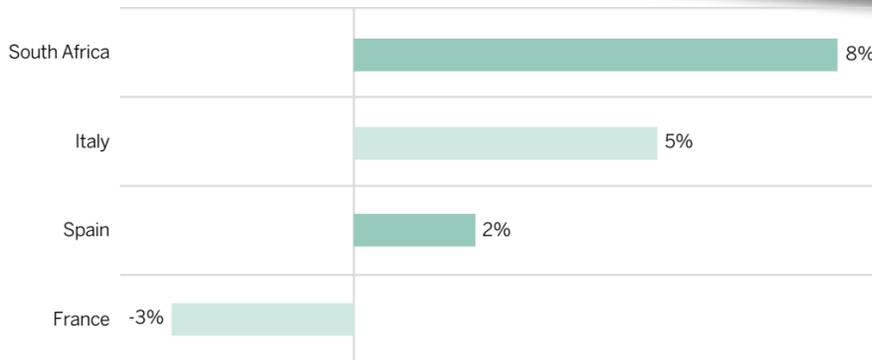




5. UK - BOTTLED WINES - % CH. VALUE



6. GERMANY - BOTTLED WINES - % CH. VALUE



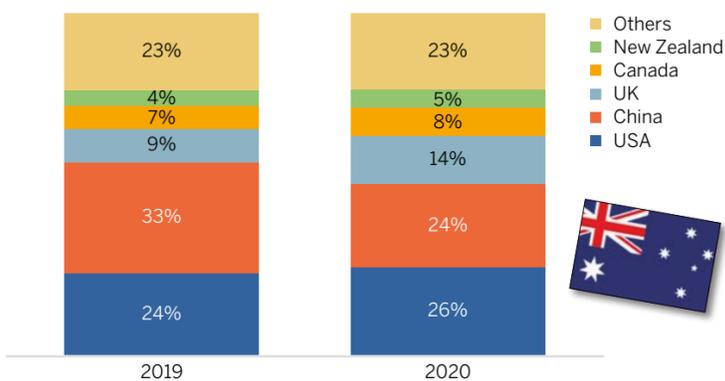
Hindered by bottlenecks in the East and the USA, suppliers directed a lot of their products towards Europe. This explains the positive signs recorded in the UK (figure 5), where importers stockpiled large quantities of product in view of Brexit, and Germany (figure 6), as well as continental and Scandinavian markets.

For some suppliers, there is a clear movement of product from markets in difficulty to new destinations. A resounding case is Australia and Chile. The former, with the Chinese route closed, diverted large quantities of still wines towards the British market and partly the American one, sacrificing value and greatly upsetting the composition of their portfolio: 9 percentage points less for China, which went back to being the second destination market, behind the USA (2 points more) and 5 more for London, jumping to 14% of the share (figure 7).

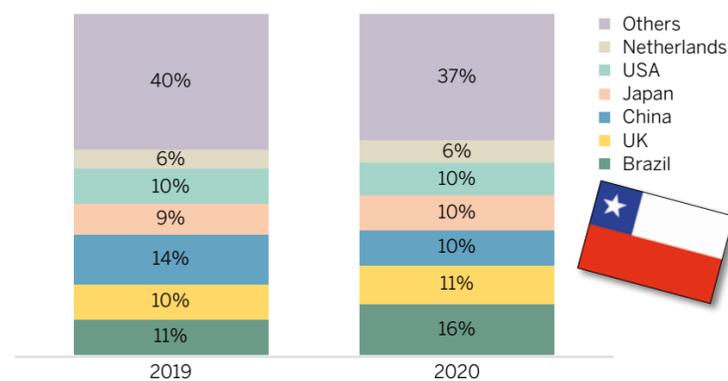
The same dynamics for Chile (figure 8), which was also hindered in China, a market that loses 4 percentage points and falls from 1st to 3rd rank, in favour of Brazil (+5 points) and UK (+1).

Very critical for the Argentinians, with almost an entire harvest in the cellar sold in tanks at sale prices (44 cents of a dollar per litre, -20%). Export values in tanks were astound-

7. AUSTRALIAN BOTTLED WINE EXPORT - SHARE % BY COUNTRY



8. CHILEAN BOTTLED WINE EXPORT - SHARE % BY COUNTRY



ing towards Spain (+450%), China (+200%), UK and Denmark (+80%) (figure 9).

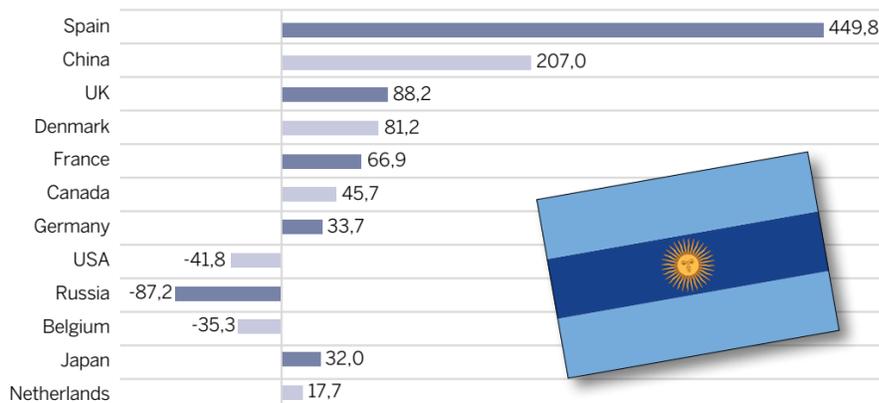
Talking of bulk wine, in the face of a market that transmitted the same volume as 2019 (31 million hectolitres) there was a real mixing of the shares. Old World countries accumulated -10%, in the face of a +11% for the New World, with this latter bloc earning 6 percentage points on total trade, rising to 48% (figure 10).

Great players in this attack, as well as the above-mentioned Argentina (+60%), were the Americans (+16), Australians (+14%) and New Zealanders (+25%), in the face of important decreases for the Italians (-15%)

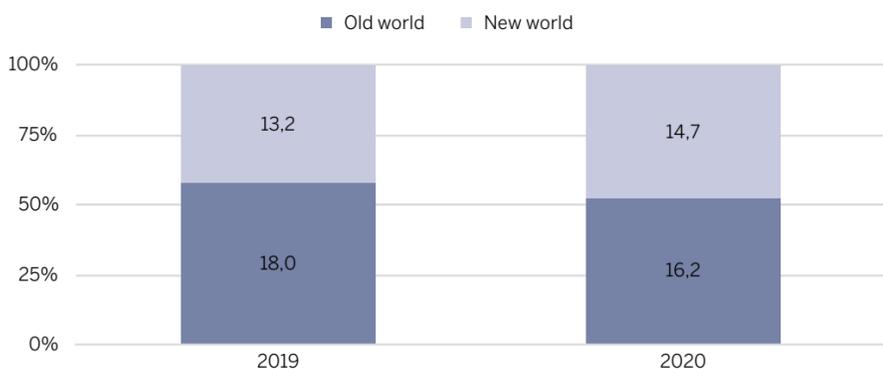
and Spanish (-9%) (figure 11).

Let's turn to sparkling wines (figures 12 to 15). 2020 was a much more complex year than for still wines, especially for France, with Champagne generally falling by 21% in value (and peaks of -30% in the USA), but also for Cava, dropping by 8%, due to the decrease in Germany (-9%) and USA (-20%), in the face of strong growth in UK (+34%). A slightly negative balance for Italian Prosecco (-3%), but with worrying alarm bells for the main markets: USA -9% and UK -10%. On a positive note, the launch of the rosé version and the good performance recorded in secondary markets, especially France.

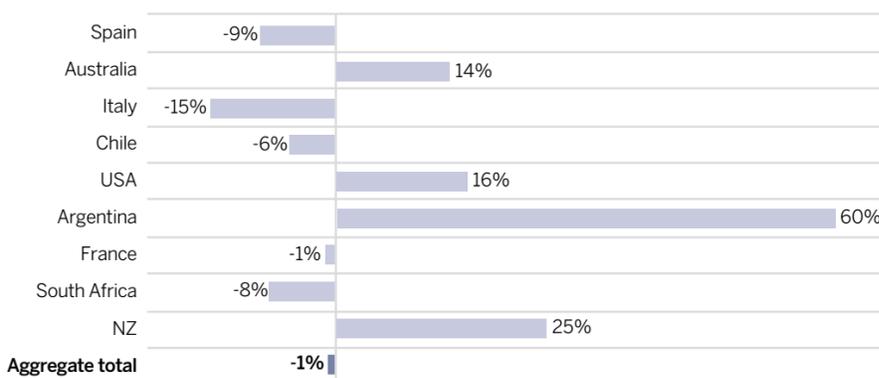
9. ARGENTINEAN BULK WINES EXPORT - % CH. VOLUME



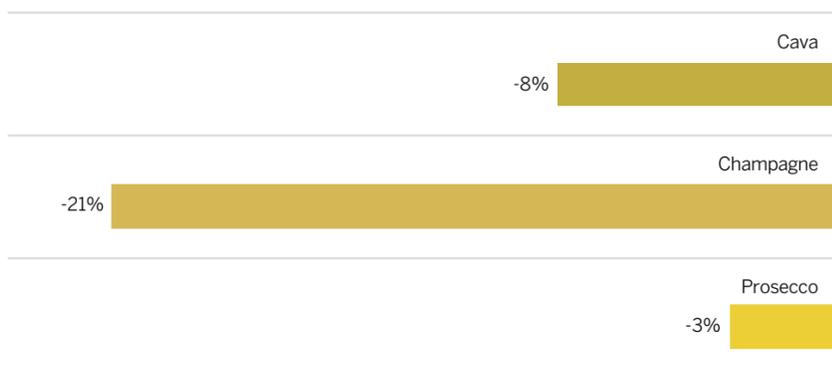
10. BULK WINES EXPORT BY AREA - MILLION HL



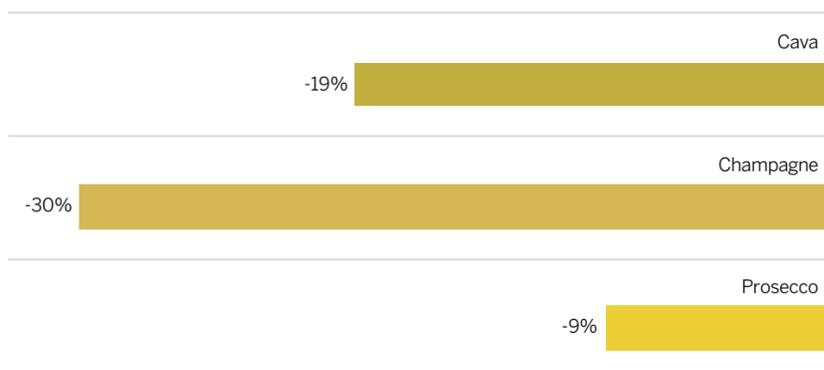
11. BULK WINES EXPORT - % CHANGE VOLUME



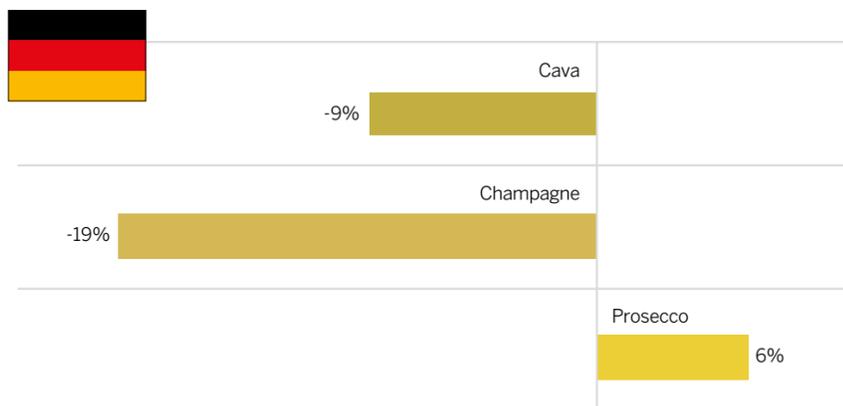
12. SPARKLING WINES - TOTAL EXPORT - % CH. VALUE



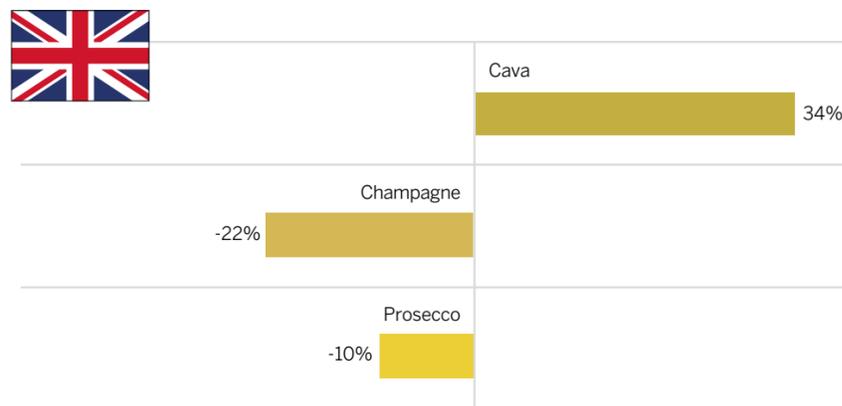
13. US - SPARKLING WINES - % CH. VALUE



14. GERMANY - SPARKLING WINES - % CH. VALUE



15. UK - SPARKLING WINES - % CH. VALUE



PERFORMANCES BY SUPPLIER

Italy

Bottled

	Litres		Euro		Euro/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
USA	201,822,516	-3.6	934,399,219	-7.9	4.63	-4.4
Germany	222,403,688	5.9	712,076,674	6.9	3.20	0.9
UK	138,899,728	-1.7	342,626,362	-0.9	2.47	0.8
Canada	60,004,223	-3.2	284,277,013	-0.7	4.74	2.6
Switzerland	41,088,909	6.9	273,600,603	7.1	6.66	0.2
Netherlands	43,109,596	23.5	152,763,234	24.2	3.54	0.5
Denmark	27,684,694	9.1	119,899,467	2.4	4.33	-6.2
Japan	25,848,271	-20.2	104,173,393	-16.3	4.03	4.9
Sweden	21,582,950	5.6	96,756,903	-0.3	4.48	-5.5
Belgium	30,091,283	25.6	93,021,368	5.3	3.09	-16.1
France	19,575,607	-26.8	78,507,950	-18.6	4.01	11.1
Norway	14,375,066	20.8	74,314,546	22.4	5.17	1.4
China	16,728,949	-33.6	70,596,593	-26.3	4.22	11.0
Russia	23,886,546	-4.0	58,386,165	-3.6	2.44	0.5
Austria	14,545,315	-1.6	45,003,582	-3.7	3.09	-2.1
South Korea	5,824,108	35.5	34,701,992	41.5	5.96	4.5
Poland	12,279,374	10.9	32,823,102	-1.4	2.67	-11.1
Finland	6,446,519	10.4	27,439,085	5.2	4.26	-4.7
Brazil	7,304,342	5.4	23,763,752	-2.9	3.25	-7.9
Ireland	7,713,801	-2.7	19,985,614	-7.3	2.59	-4.8
Czech R.	6,303,147	-1.2	18,238,219	-8.3	2.89	-7.1
Hong Kong	1,467,364	-15.5	15,701,001	-11.2	10.70	5.0
Spain	1,614,073	-38.8	10,292,624	-26.6	6.38	20.0
Mexico	2,275,273	-7.7	6,301,238	-21.3	2.77	-14.7
Others	56,039,579	-0.4	223,932,076	-2.1	4.00	-1.7
Total	1,008,914,921	0.2	3,853,581,775	-1.1	3.82	-1.3



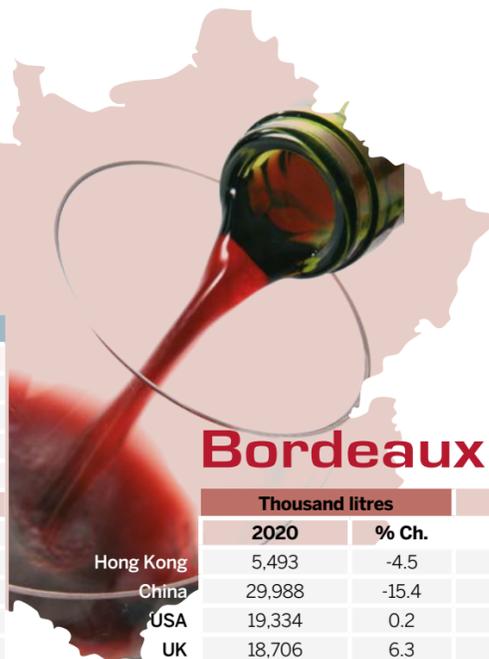
Sparkling

	Litres		Euro		Euro/litres	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
UK	92,929,624	-1.7	288,768,210	-10.0	3.11	-8.4
USA	65,068,634	-3.1	259,755,960	-8.6	3.99	-5.6
France	16,163,229	17.7	54,388,447	4.8	3.36	-11.0
Germany	13,607,044	18.5	53,150,527	5.7	3.91	-10.8
Switzerland	10,011,877	8.3	45,391,345	5.8	4.53	-2.3
Sweden	9,143,465	22.4	34,767,780	14.7	3.80	-6.3
Belgium	9,858,171	17.4	32,410,334	9.6	3.29	-6.6
Canada	6,186,635	-0.6	31,143,326	-1.3	5.03	-0.8
Russia	6,641,201	35.7	24,655,226	27.6	3.71	-6.0
Austria	5,491,105	21.9	24,094,405	18.7	4.39	-2.6
Poland	6,209,992	15.8	22,252,200	8.8	3.58	-6.0
Norway	3,093,148	17.6	13,506,435	11.7	4.37	-5.0
Netherlands	2,546,834	40.6	10,285,719	23.2	4.04	-12.4
Ukraine	2,001,384	80.7	8,013,625	73.5	4.00	-4.0
Czech R.	1,908,358	22.6	7,154,014	7.6	3.75	-12.2
Finland	1,624,619	15.2	7,105,054	15.7	4.37	0.5
Japan	1,149,731	9.0	5,415,749	4.8	4.71	-3.8
Others	24,509,027	-1.7	97,130,928	-10.5	3.96	-9.0
Total	278,144,078	4.0	1,019,389,284	-3.2	3.66	-6.9

France

Region/Type

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Champagne	94,587	-17.0	2,460,815	-20.5	26.02	-4.2
Other sparkling	76,104	-6.5	328,851	-4.0	4.32	2.7
Sparkling total	170,691	-12.6	2,789,666	-18.8	16.34	-7.1
Slightly sparkling	4,325	-1.2	19,544	9.6	4.52	10.9
Bordeaux	166,682	-2.6	1,761,212	-13.6	10.57	-11.3
Bourgogne	59,941	0.7	977,749	-0.8	16.31	-1.5
Alsace	15,926	0.9	88,168	-2.6	5.54	-3.4
Val de Loire	34,318	-0.4	219,819	-6.9	6.41	-6.5
Beaujolais	20,723	-0.5	99,341	-3.4	4.79	-2.9
Côtes du Rhône	61,831	-3.3	378,593	-7.5	6.12	-4.3
Languedoc-Roussillon	33,175	-8.1	165,010	-10.8	4.97	-2.8
Igp-Vin de Pays	272,335	-7.2	767,083	-4.8	2.82	2.6
Varietals	74,497	0.5	195,215	3.5	2.62	3.0
Common wines	83,838	-18.0	166,184	-15.8	1.98	2.7
Others	136,803	-0.3	730,618	-4.1	5.34	-3.8
Bottled total	964,393	-4.8	5,568,536	-7.5	5.77	-2.8
2-10 liters	49,230	13.4	119,765	7.1	2.43	-5.6
Bulk	173,368	-1.2	233,580	16.9	1.35	18.4
Total export	1,357,683	-4.9	8,711,546	-10.8	6.42	-6.2



Bordeaux

	Thousand litres		Thousand Euro		Euro/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Hong Kong	5,493	-4.5	293,587	-1.6	53.45	3.0
China	29,988	-15.4	219,736	-12.9	7.33	3.0
USA	19,334	0.2	204,977	-29.0	10.60	-29.1
UK	18,706	6.3	203,831	-19.0	10.90	-23.8
Switzerland	4,051	-4.2	109,960	-12.8	27.14	-9.0
Japan	15,529	3.7	108,104	-10.2	6.96	-13.4
Belgium	15,397	0.7	102,135	-3.5	6.63	-4.2
Germany	12,866	6.5	90,960	-12.7	7.07	-18.0
Canada	6,269	0.7	55,032	-12.7	8.78	-13.4
Singapore	1,303	-33.6	31,496	-13.0	24.18	31.1

 **Spain**

Bottled

	Litres		Euro		Euro/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
UK	107,989,602	18.4	266,517,732	12.2	2.47	-5.2
USA	43,199,947	-3.9	205,144,284	-7.0	4.75	-3.2
Germany	87,916,971	6.9	191,231,732	1.7	2.18	-4.9
Netherlands	47,058,478	21.2	110,015,741	24.8	2.34	3.0
Switzerland	15,485,655	6.4	109,316,279	8.5	7.06	2.0
Canada	20,940,154	2.7	92,905,644	7.5	4.44	4.6
China	37,993,110	-29.6	78,739,581	-32.4	2.07	-4.0
France	47,572,232	-0.1	53,059,607	-6.3	1.12	-6.2
Mexico	11,565,750	-34.9	42,881,359	-27.3	3.71	11.5
Japan	18,775,549	-9.0	40,529,089	-13.3	2.16	-4.7
Portugal	77,255,207	-16.8	38,001,345	-7.0	0.49	11.8
Belgium	11,788,069	10.7	35,697,606	4.3	3.03	-5.8
Sweden	8,739,878	-0.2	33,315,903	3.4	3.81	3.6
Ireland	9,144,373	21.6	31,175,893	38.3	3.41	13.8
Denmark	10,895,768	3.0	30,597,083	14.7	2.81	11.4
Norway	3,686,123	11.5	20,211,763	28.5	5.48	15.3
South Korea	7,781,468	41.3	19,494,174	45.8	2.51	3.2
Poland	8,639,427	-16.1	17,288,426	-11.0	2.00	6.0
Brazil	7,516,596	21.5	16,956,185	4.7	2.26	-13.8
Russia	10,089,349	4.7	14,503,524	0.1	1.44	-4.4
Czech. R.	9,512,950	13.9	10,808,373	9.1	1.14	-4.2
Hong Kong	2,057,282	-18.0	10,046,955	-24.2	4.88	-7.6
Ukraine	5,067,031	15.4	10,036,990	26.1	1.98	9.3
Finland	3,547,897	4.1	9,519,266	-0.4	2.68	-4.2
Italy	13,272,095	21.4	8,245,835	5.3	0.62	-13.3
Austria	1,716,069	41.1	6,941,140	12.7	4.04	-20.1
Others	98,655,001	-11.7	190,061,434	-14.6	1.93	-3.2
Total	727,862,032	-1.6	1,693,242,941	-1.2	2.33	0.5

 **Australia**

Bottled

	Thousand litres		Thousand AUD		AUD/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
China	80,598	-32.1	930,486	-13.2	11.54	27.8
USA	88,009	2.6	371,595	1.8	4.22	-0.7
UK	48,222	45.1	219,632	51.4	4.55	4.3
Canada	27,282	4.4	158,749	7.1	5.82	2.6
Hong Kong	7,801	-22.9	154,266	28.7	19.77	67.0
Singapore	6,827	0.1	85,981	-13.1	12.59	-13.2
New Zealand	17,507	21.8	81,832	23.7	4.67	1.5
Malaysia	2,923	1.8	44,958	25.3	15.38	23.1
Netherlands	8,698	-11.5	37,368	0.9	4.30	14.0
Japan	5,729	-11.6	29,964	-14.5	5.23	-3.2
Sweden	4,696	18.3	25,399	40.9	5.41	19.1
South Korea	3,174	25.3	25,278	26.1	7.96	0.6
Thailand	2,411	-28.0	19,395	-9.9	8.04	25.1
Taiwan	2,168	-31.3	17,923	4.3	8.27	51.9
Denmark	5,377	41.1	17,690	28.8	3.29	-8.8
Ireland	3,724	66.3	14,825	78.5	3.98	7.4
Germany	2,487	-6.2	12,625	4.9	5.08	11.8
United AE	1,789	-47.6	11,819	-62.9	6.61	-29.3
Others	18,187	-12.3	167,714	33.1	9.22	51.8
Total	337,609	-6.3	2,427,499	1.5	7.19	8.3

 **New Zealand**

Bottled

	Thousand litres		Thousand NZD		NZD/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
USA	59,149	7.7	518,786	7.7	8.77	0.0
UK	38,575	-1.1	304,124	4.6	7.88	5.8
Australia	29,346	-17.6	224,155	-16.4	7.64	1.5
Canada	12,074	1.4	130,949	1.9	10.85	0.5
Ireland	3,608	16.8	32,519	28.2	9.01	9.8
Netherlands	3,286	16.1	26,287	16.7	8.00	0.5
China	2,024	-8.5	26,191	-8.8	12.94	-0.3
Germany	2,853	-6.5	17,282	-23.2	6.06	-17.8
Hong Kong	1,208	16.4	15,683	22.8	12.98	5.5
Singapore	1,077	-9.0	15,306	-12.2	14.21	-3.5
Japan	1,130	0.2	13,643	0.5	12.07	0.3
Sweden	1,202	-14.3	11,314	-7.2	9.41	8.4
France	757	-26.5	10,817	-24.2	14.29	3.1
Denmark	743	-4.1	6,280	2.0	8.45	6.3
UAE	240	-32.5	2,993	-40.6	12.47	-12.1
Others	7,900	0.6	69,817	2.6	8.84	1.9
Total	165,173	-1.3	1,426,148	0.6	8.63	2.0

 **Argentina**

Bulk

	Litres		\$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
UK	29,549,009	88.2	31,406,467	40.7	1.06	-25.2
Canada	30,966,499	45.7	10,938,920	24.0	0.35	-14.9
China	36,757,323	207.0	8,269,162	187.3	0.22	-6.4
Spain	35,710,220	449.8	6,731,388	357.2	0.19	-16.8
USA	8,653,180	-41.8	6,657,553	-17.6	0.77	41.6
Germany	4,648,611	33.7	2,943,249	-28.7	0.63	-46.7
Denmark	3,859,777	81.2	2,386,530	4.8	0.62	-42.2
France	3,192,000	66.9	2,194,673	23.3	0.69	-26.1
Belgium	792,000	-35.3	480,897	-59.0	0.61	-36.7
Russia	1,368,213	-87.2	378,050	-84.0	0.28	25.0
Japan	555,000	32.0	263,874	7.4	0.48	-18.7
Netherlands	226,000	17.7	226,355	6.5	1.00	-9.6
Italy	120,000	25.0	169,200	10.0	1.41	-12.0
Others	36,962,599	21.7	12,820,235	18.1	0.35	-2.9
Total	193,360,431	60.1	85,866,553	28.6	0.44	-19.6

 **Chile**

Bottled

	Thousand litres		Thousand \$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
China	49,665	-29.3	185,153	-26.5	3.73	3.9
Brazil	74,982	39.4	183,828	23.9	2.45	-11.1
UK	53,406	10.2	152,172	14.4	2.85	3.8
USA	46,727	-0.5	133,959	-8.1	2.87	-7.7
Japan	48,354	10.0	131,729	4.8	2.72	-4.7
Netherlands	29,978	5.8	92,895	10.8	3.10	4.7
Canada	20,696	-2.0	72,699	-3.2	3.51	-1.2
South Korea	15,148	33.7	58,136	25.6	3.84	-6.1
Ireland	15,083	10.7	48,229	15.6	3.20	4.4
France	1,905	-2.7	33,990	8.8	17.84	11.8
Mexico	13,273	-9.7	32,944	-18.7	2.48	-10.0
Germany	10,426	2.3	31,471	-4.2	3.02	-6.4
Russia	13,319	5.3	31,454	-1.1	2.36	-6.1
Colombia	11,674	13.4	30,570	7.9	2.62	-4.8
Denmark	4,851	-40.9	18,481	-39.1	3.81	3.0
Belgium	4,514	-31.6	14,970	-29.5	3.32	3.0
Sweden	4,158	-4.4	13,991	-2.1	3.36	2.4
Finland	4,154	-7.6	12,751	-8.1	3.07	-0.5
Paraguay	4,279	-30.2	10,271	-33.7	2.40	-4.9
Others	57,058	-15.7	183,645	-16.9	3.22	-1.4
Total	483,652	-0.3	1,473,341	-3.9	3.05	-3.6

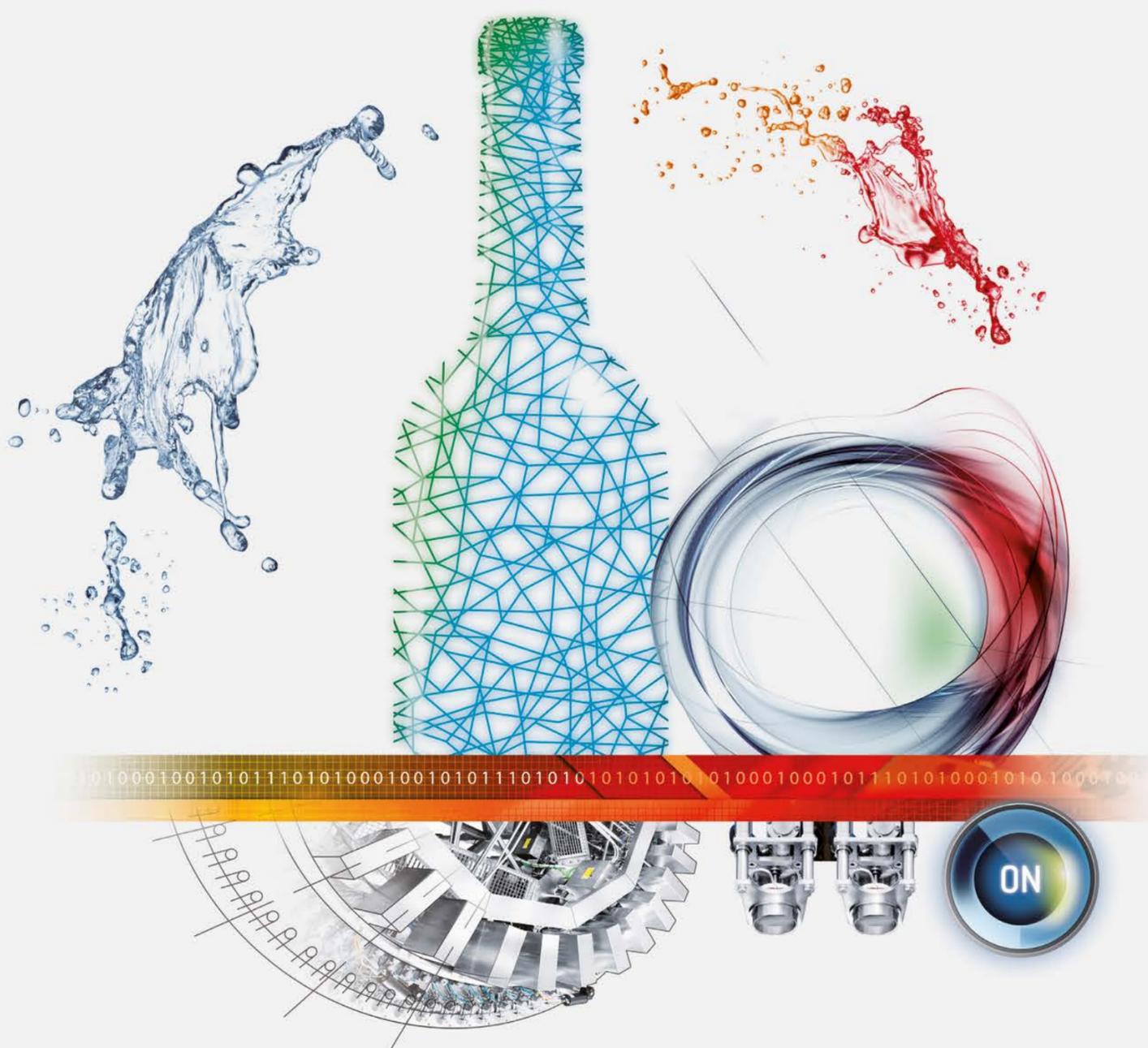
 **USA**

Bottled

	Thousand litres		Thousand \$		\$/litre	
	2020	% Ch.	2020	% Ch.	2020	% Ch.
Canada	52,927	6.7	407,516	7.1	7.70	0.4
Japan	6,118	-13.8	67,659	-3.0	11.06	12.5
Hong Kong	5,124	-34.8	56,509	-45.8	11.03	-16.8
UK	7,111	-23.3	54,336	-18.7	7.64	6.1
South Korea	5,122	30.0	39,908	100.2	7.79	54.0
Denmark	3,566	-11.2	32,592	14.3	9.14	28.8
Sweden	2,489	-23.5	17,605	-8.8	7.07	19.1
China	2,731	-52.6	15,966	-48.5	5.85	8.8
France	1,434	-64.0	14,927	-76.4	10.41	-34.6
Switzerland	1,927	-16.5	14,062	-1.1	7.30	18.4
Mexico	2,881	-29.4	13,874	-14.9	4.82	20.6
Belgium	1,010	-16.7	11,290	-5.2	11.18	13.9
Netherlands	1,287	5.1	10,993	16.7	8.54	11.0
Taiwan	1,393	14.0	10,815	7.1	7.76	-6.0
Germany	1,425	-20.2	10,159	-22.3	7.13	-2.6
Singapore	962	-20.3	9,757	-5.7	10.14	18.4
Philippines	2,206	-59.2	7,702	-49.9	3.49	23.0
Others	19,183	-24.9	112,620	5.4	5.87	40.4
Total	118,896	-14.3	908,290	-8.4	7.64	7.0

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vineyards for over 60 years

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oenological process
management

Enoveneta starts in 1960s and during the years has become a leading international company. Within an area of 40.000 sqm and with a team of more than 60 employees, Enoveneta design, produce and trade the most advanced technologies for the modern oenological process management. From conception to the selection of technologies, a 360° consulting service: thanks to our

highly specialized team, we can guide each customer through the research phase of the technological solution to best suit his or her production needs. This consultancy relationship is fundamental for us and creates a tight-knit collaboration with the customer that allows us to follow each project closely. Reliable and complete partners for the management of turnkey production unit projects: the complete design, development and production process is managed from our premises in Piazzola sul Brenta, in the Province of Padua, Italy. This allows us to respond promptly to the various requests and to intervene in

the customization of the products to best adapt them to the needs of each customer. A timely support service in every corner of the world, even during the harvest: flexibility and efficiency, these are the principles that also define our technical support and after-sales service. Thanks to our foreign branches and international network of agents and distributors, we can respond quickly and effectively to every customer, wherever they are in the world. Expertise, reliability and passion. This makes Enoveneta the main technological partner for the oenological sector.
www.enoveneta.it

ENOPLASTIC

Organic and beautiful: Cantina Pizzolato's sparkling wine and packaging are a great success



Consumers are looking for quality and innovation in their purchase choice. A beautiful, ethical and sustainable product seem to be the most desired aspects. It is a challenge, to communicate the most important aspects of wine in a balanced way. The only available tool is the packaging. Cantina Pizzolato tells the reasons for the change: "analysing the causes of a slight drop in sales in the Scandinavian Rosé sparkling wine market, we decided on an even more sustainable restyling of the packaging. A market analysis has taught us that our customers are women between 30 and 45, very active on social networks and sensitive to sustainability. The restyling into M-USE, including a special bottle dedicated for reuse and a matching glitter label and Enoplastic glitter sparkling foil is a big success. We have succeeded to express through our packaging that our wine is not only certified organic, but also beautiful and the result of ethical and careful choices". Cantina Pizzolato continues: "We made a successful choice, going for an Enoplastic Glitter Sparkling foil: the foil made with Derma material, immediately caught our attention. The Enoplastic team guided us, with its ideas and skills: due to the development of many technical details, the constant improvement and reliability, we now have an amazing sparkling foil, which corresponds to the image of M-USE". Enoplastic confirms: "We have the same passion and enthusiasm as our customers. We are always available to collaborate for innovative, amazing, and sustainable over-capping solutions. We are happy to see that our innovations in packaging, result in success for our customers, such as Cantina Pizzolato's sparkling wine 'M-USE'".

ERO Quality, profitability and comfort made in Germany

As a family owned and managed company, Ero GmbH is one of the largest manufacturers of vineyard equipment and grape harvesters in Germany. With 270 employees, Ero exports to all the main wine-growing regions in the world and is one of the leading brands in the industry. Founded in 1965, Ero-Gerätebau GmbH began manufacturing vineyard equipment in 1970. The very first product introduced long-lasting changes to vineyard work practice. In the case of trimmers, ERO became the first manufacturer to introduce the rotating blade principle for vine trimming. Today more than 90 percent of all trimmers sold employ this principle. In 1978 Ero launched the shoot binder, making it the first manufacturer to successfully mechanize the vertical positioning and binding of vine shoots. In the early 1980s, with the presentation of the Ero Grape Harvester prototype in 1981, the company joined the ranks of harvester manufacturers. At the core of the company's success is its uncompromising emphasis on innovation. The Ero Grape Harvester was the first to be offered with an integrated destemmer; it was the first grape harvester to feature automatic steering as standard equipment, and the only grape harvester with a road speed of 40 km/h. With the takeover of Binger-Seilzug in 2006, Ero GmbH became the proprietor of a further well-established German manufacturer of vineyard equipment. The Ero and Binger range of canopy equipment has a well-deserved reputation for reliability, ease of use, and outstanding results. An extensive variety of models and equipment options allows every machine to be configured to suit a particular vineyard application. *For further information, please contact: Luca Peretto +39 348-3108971, or via e-mail: luca.peretto@ero.eu - (International) Ralf Licht, +49 176-19944049, or via e-mail: ralf.licht@ero.eu*



GRUPPO BERTOLASO What innovation means to us

Innovation is a very diffused word when talking about technology. For us at Bertolaso it has a very precise value, which goes beyond the simple quest for novelty. To us innovation means responsibility. At Bertolaso we are well aware of the crucial importance of our machinery in our customers' work. This is why there cannot be technical evolution if not for the benefit of systems reliability, which must be a productivity guarantee. Innovation means experience. Bertolaso is dedicated to the needs of those who have been bottling for 140 years. The activity of our Research and Development team is so incisive because it is based on unparalleled expertise and specialist competence. Innovation means

collaboration. Our solutions bring advantages because they respond to the actual, specific needs of each individual partner. Our designers have a *dedicated* method, which starts with the relationship with the customer and stays active over time. Innovation means performance. Technological innovation is measured in its concrete advantages. The most recent implementations have allowed our machinery to achieve 48,000 bottles per hour. Innovation means vision. In an increasingly demanding market, the profound value of being innovative for us lies right here: in reading the evolution of a market, by anticipating its horizons and thus being able to orient our partners. This is true innovation for us.



IDEAL Ideal solutions for your vineyards

Since 1947 Ideal company has been producing sprayers of all kind and for protection of all types of crops, focusing on both product customization and innovation. And despite the pandemic affecting the entire world, Ideal has continued its commitment in improving its offer, to meet both laws and markets requirements. Models for vineyard protection are many and with different features. Among low volume sprayers the most technological and environment-friendly remains Drop Save, allowing an automatic work as well as a 50% recovery on average thanks to its special computer and anti-drift panels. Other solutions for vineyard are Ideal low volume sprayers with multi-row boom like Supra or Diva, permitting to spray up to 3 rows contemporarily on vineyards with a very low liquid supply per hectare, for focused treatment. Also, Bora model deserves to be mentioned: its special configuration with fan group hanging on tractor and tank trailed by a tracker drawbar make it the perfect machine to work on more rows of espaliers vineyards on hilly grounds. In addition to low volume models, Ideal provides various sprayers with axial

fan anyway, for those farms having smaller extensions or special grounds. Among all, we would remind Loire and Alsace top sprayer, both with tower and reverse suction but differently configured to allow proper treatments according to vineyards features. These are only a few solutions among the wide range of product offered by Ideal for vineyard protection, which has been working for over 70 years to find the best care for your crops.

Please visit our website www.idealitalia.it for more information



MAS PACK From Jamaica to South America, the packaging “dress” Italian style

For Mas Pack Packaging of San Marzano Oliveto a big order has recently come from Chile, and last year the Italian company has realized a bottling plant for Campari on the island. From Chile to Piedmont, to “dress” Italian style, this is the choice that a south America company specialized in the wine production, a growing sector at those latitudes, has done. To find the best solution for their bottles they decided to cross the ocean and to sign an important contract for the supply of a wine packaging plant with who, having its venue in Piedmont, was born and grown up among the lands of wine; the company Mas Pack Packaging. “International markets have become very important for us, and we are proud to represent our region and the Italian style in the world” commented the chairman of Mas Pack, Mr. Dario Scaglione. Currently Mas Pack employs 120 people in its Italian venue, with branch offices located in France, Spain and USA. From SME rooted in the territory, with products designed for local companies, Mas Pack nowadays is an international company, as demonstrated by another important bottling plant installed in Jamaica for a company directly controlled by Campari group. Mr. Scaglione, said: “Piedmont besides being a famous wine-growing region it has also become a very important area for the enomechanical industry that ranks as reference point for the whole sector around the world”. Mas Pack today is present with its machineries in more than 50 countries, to browse the clients list of Mas Pack is like reading the wine list of the world. From Italy to France, from Chile to California, from South Africa to Australia renowned wine producers and giants of the beverage sector utilise packaging plants produced by Mas Pack Packaging in Piedmont.

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

Pvc-Free capsules...
Now,
for all kinds of capsules!
● Pvc-Free thermo-shrinking capsules
● Pvc-Free poly laminate capsules
● Pvc-Free champagne capsules
Successful removal of any vinyl resins.
If you want Pvc-Free capsules,
Metalux Capsule can satisfy your needs...
Enter the new era of Pvc-Free capsules!



TMCI PADOVAN

The perfect couple for crossflow
filtration of both sediments and wine



Nitor + and Dynamos HP: are the universal multipurpose solution for the crossflow filtration of pre and post-fermentation sediments and wines for medium and large sized wineries. Nitor +, equipped with either PES or PP polymer hollow fibre membranes or ceramic tubular membranes, fully assembled in-house, with the exclusive interchangeable 8" modules and Dynamos HP, in a high-performance version with new monolithic vitreous-ceramic discs, which allow mechanical resistance and significantly increased yields, are now combined to offer maximum results. A perfect combination: Pre-concentration of sediments with static cross

flow and final concentration with dynamic crossflow and recovery of very high-quality filtrate; Nitor+ can be equipped with wide bore fibres designed for suspended solids during harvest and with standard diameter fibres for wine filtration during the rest of the year. Distinctive features: exclusive system of membranes cleaning from the vegetable fibres generated during the concentration process; no significant thermal variation between filtrate inlet and outlet; both filters do not require any glycol or cold-water cooling system; all operations are carried out in a totally anoxic environment; very low energy consumption. Teamwork divides tasks and multiplies success.

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.

VINVENTIONS

Nomacorc Green Line: sustainability, total control and happy consumers

A complete line of wine closures that not only eliminates the defects associated with cork, but also guarantees no negative effects on the food supply and the environment? We are talking about Nomacorc Green Line by Vinventions. The patented formulation of Nomacorc Green Line is founded on plant-based raw materials derived from sugarcane grown in an eco-responsible way. A 100% renewable source of raw materials that allows the entire closure range to obtain the 3-star "OK biobased" certification, an independent and high-quality guarantee of the renewability of the Green Line closures raw materials. Do you know that

Nomacorc Green Line closures are completely Tca-free and 100% glue free? The organoleptic neutrality of Nomacorc closures guarantees the absence of any kind of contamination or unpleasant taste deriving from the closure. Furthermore, the use of advanced coextrusion technologies assure constant uniformity from a bottle to another. Nomacorc technology allows precise management of oxygen ingress rates

in line with the objectives of the winemaker, to manage the freshness of young wines and the long-term ageability of premium wines. A wine bottle protected by Nomacorc is the guarantee for the consumer to drink the result of the work done in the cellar without any detour. Nomacorc ensures easy extractions, and consumers never open a bottle to discover off-aromas, cork taint, or broken corks.



enoplastic

Express your image with innovative packaging



“ We made a successful choice, going for an **Enoplastic Glitter Sparkling Foil**; made with DERMA material. The **Enoplastic team** guided us, with its ideas and expertise, and thanks to their drive for constant improvement our foil now fits the image of M-USE. ”

Sabrina Rodelli, Export Manager La Cantina Pizzolato

DERMA™
GREEN TECHNOLOGY

INNOVATIVE
MATERIAL

REDUCTION OF THE
CARBON FOOTPRINT

PRODUCTION PROCESS
CLEAN AND EFFICIENT

enoplastic.com