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Artificial Intelligence is now part of our lives, and the wine industry makes no exception. For this reason, the 2024 wine2wine Business Forum is dedicating its 11th edition to the AI universe and its applications in the world of wine. Theo's edition of wine2wine introduces a new format designed to enhance the participants' experience. The 30-minute in-depth sessions, divided into "basic" and "advanced"

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4-5 Nov 2024  
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knowledge levels, will be led by international speakers selected among the top experts in the field. Furthermore, networking activities have been further structured through practical workshops, specifically designed to connect wine professionals. Additionally, there will be six tasting sessions and, on the first day, the wineries selected by Wine Spectator for OperaWine 2025 will be announced.

# WINE WORLD MAGAZINE

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The influence of California tech but also the passion for wine and its pairing with food are the many signals that can suggest a potential approach to foreign trade- and interest in the sector- of the White House possibly led by Kamala Harris. The pieces in the puzzle are there, but they are not easy to put together and interpret, especially on tariffs. At least on paper, foreign wine producers should fear a possible Harris' presidency less than Donald Trump's comeback

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CC Comité Européen  
C des Entreprises Vins



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THE VIEW OF THE PRESIDENT OF THE U.S. NATIONAL ASSOCIATION OF BEVERAGE IMPORTERS

# WINE in Kamala Harris' Political Puzzle

By ROBERT M. TOBIASSEN

President of NABI - National Association of Beverage Importers



**D**uring her acceptance speech at the Democratic National Convention on the evening of August 23, 2024, Vice-President Kamala Harris made a subtle trade policy declaration.

"Now compare that to Donald Trump. Because I think everyone here knows, he doesn't actually fight for the middle class. Not — he doesn't actually fight for the middle class. Instead, he fights for himself and his billionaire friends. And he will give them another round of tax breaks that will add up to \$5 trillion to the national debt. And all the while, he intends to enact what, in effect, is a national sales tax, call it a "Trump tax", that would raise prices on middle-class families by almost \$4,000 a year. Well, instead of a Trump tax hike, we will pass a middle-class tax cut that will benefit more than 100 million Americans." Without using the words "tariffs" or "trade" and by linking the Trump proposal on tariffs to the concept of a tax on consumers, the Vice-President masterfully made her point very clearly without having to defend "free trade" or trade with the People's Republic of China (China). A senior policy advisor to the Vice-President ensured that this point was slipped into her acceptance speech; not one word appears in a speech of this importance without a purpose for it being there. This means that any effort to discern the potential trade policies of a Harris-Walz Administration must come from reading isolated statements and watching random actions of conduct. In other words, picking up a lot of crumbs off the ground to piece together to see the whole Torta Barozzi or Sbrisolona in the big picture of trade.

## The Institutional and Social Context

Her brief remark on tariffs as a "Trump tax" tells me that she does not see retaliatory tariffs as the first tool of use in a trade dispute or "trade war." Rather, they are a valid tool but need to be used carefully and pointedly. Tariffs against China are viewed differently than tariffs against EU Member States and other countries. Much of this process or analysis, requires looking at what Ms. Harris did before becoming the current Vice-President. It is a clear error of judgement to believe that President Biden's trade policies are shared by the Vice-President. In the United States, the Vice-President is a "loyal foot soldier" whose job is to help make the President look good. Looking at former Vice-President Mike Pence exemplifies this because except for the final month of the Trump Administration, Mr. Pence walked in lock-step with President Trump. But once he deviated by not blocking the electoral college vote by the Congress on January 6<sup>th</sup>, he was "dead in the water." And he has yet still to be redeemed by the Republican Party. By virtue of the institution of the Presidency, Vice-President Harris has to support President Biden in interviews and speeches and cannot respectfully disagree publicly with him. For this reason, any efforts to tie her trade policy in the future with President Biden's trade policies of today is baseless. For those in this country who understand the Executive Branch, the President solely makes the final decision; it is not a consensus decision but an informed decision that includes the views of the Vice-President, among others. Much like Mr. Biden as President, has not framed issues the same way as President Obama even though he served Mr. Obama as Vice-President. President Harry Truman said forcefully, "the buck stops here." Presidents of the United States independently and solely make their own decisions at the end of the day. One final preliminary comment. When talking about "tariffs," the average U.S. consumer assumes that we are talking about China. The reality is that the public policies on tariffs need to be bifurcated: Tariffs on China and Tariffs on the other countries of the world. Few U.S. consumers understood or even recognized the fact of the Airbus-Boeing "retaliatory tariffs" (that is, withdrawal of certain trade concessions or mandatory obligations) under the decision by the World Trade Organization (Wto). Today in the U.S. when you hear "tariffs" you automatically think of China.



## Putting Together the Pieces to Build the Full Picture

Let us now look for those "crumbs" we referred to earlier, analysing the positions of Ms. Harris on trade in her recent and less recent past.

### As a U.S. Senator Representing California

Before she was elected to the Senate, Ms. Harris said that she would have opposed adoption of the North American Free Trade Agreement (Nafta) and she is one of 10 Democrats who voted against the United States-Mexico-Canada Agreement (Usmca) which was negotiated by the Trump Administration to replace Nafta. Her consistent arguments against these agreements are the insufficient protection of workers and a lack of adequate environmental protections. Much of Ms. Harris' professional life can be understood by realising that she is concerned about protecting individuals. As the District Attorney in San Francisco and the California Attorney General, she was guided by how a position does impact or help individuals. When given a recommendation by staff or others, she would frequently ask, "OK, but how does this affect people?". She served on the Senate Committees on Budget, Environment and Public Works, Homeland Security and Governmental Affairs, and Select Committee on Intelligence. She did not serve on the Senate Finance Committee which has primary jurisdiction over trade legislation. Her involvement with foreign policy focused much more on national security questions and not commercial trade questions.

At the same time, during her Senate years, she was a member of the bipartisan Congressional Wine Caucus, a bipartisan group dedicated to protecting "the interests of our vibrant wine community from grape to glass". It has members from both the Senate and the House of Representatives.

California is known around the world for its agriculture, including its wine industry. In 2024, California will be the 5<sup>th</sup> largest economy in the world for the seventh consecutive year, with a nominal Gdp of nearly \$3.9 trillion in 2023 and a growth rate of 6.1% since the year prior, according to the U.S. Bureau of Economic Analysis (Bea). On a per capita basis, California is the second largest economy in the world. Over \$50 billion of the California economy is agriculture based and the State is the largest agricultural economy of any State.

Ms. Harris, however, is not traditionally tied to the agricultural sector of California. Rather she is known for her connections with the technology sector. Indeed, one of her large supporters is the widow of Steve Jobs. One person said that Ms. Harris knows the "founders" which is the term used to describe the small companies that became the Apple and Google of today. Growing up she

*The influence of California tech but also the passion for wine and its pairing with food are the many signals that can suggest a potential approach to foreign trade—and interest in the sector—of the White House possibly led by Kamala Harris. The pieces in the puzzle are there, but they are not easy to put together and interpret, especially on tariffs. At least on paper, foreign wine producers should fear a possible Harris' presidency less than Donald Trump's comeback*

witnessed how small companies can grow and this influences her views on helping the small business communities. She sees them as "individuals."

Moreover, coming from Oakland, California in the urban San Francisco Bay Area, she was never linked with the agricultural sector in the central and coastal communities of California. However, she is a wine drinker and would be the first president in eight years who does not avoid drinking alcoholic beverages. The New York Times said that "Harris injects wine into politics". This means in a social way and not a tariff way. One local Wine Bar owner in Washington, DC said "She can talk about different varietals. She can talk about differences between California oak and French oak... She knows what she likes and doesn't like, and knows why she doesn't like it". (She's also apparently a good tipper.) The Vice-President has an interest in cooking and foods both from the wine pairing side and from the side of protecting farm workers and combating food insecurity. Again, her interests in the individual are present here.

### As the Attorney General of California and District Attorney of San Francisco

Little in these two positions tell us much about Ms. Harris' views on trade *per se*. Her legal record in both jobs is mixed and controversial. For me, the primary take-way is again her guiding interest in individuals. She prosecuted sex-traffickers and filed legal actions against large corporations that she said were hurting individual consumers. After the "great recession" of 2008, she worked with other State Attorneys General to recover monies for homeowners who were defrauded by lenders and she obtained greater financial benefits for homeowners in California than those received in other States. In evaluating how Ms. Harris will look at a situation, you always need to ask what are the consequences of a decision insofar as it impacts individuals.

### As a Californian Who Grew up in the San Francisco Bay Area

As mentioned earlier, Ms. Harris is focused on the technology sector in California. This is not surprising given she grew up not too far from Silicon Valley at the time it was establishing itself as the world leader in technology development. Ms. Harris was born in 1963, and in her early life saw the "wonders" of creation coming from the south end of the San Francisco Bay. In her debate with Mr. Trump, she stressed the importance of the United States continuing to be a leader in this field and criticised Mr. Trump for some of his trade policies with China that allowed China to acquire certain "chips". In this sense, she is a forward-thinking policy person as opposed to Mr. Trump who campaigns on "looking back" to what America was and should return to. Ms. Harris wants to manage building the future, however unknown that future may be.







Given Ms. Harris' interests in the technology sector, one needs to ask how she would respond to the trade disputes over Digital Service Taxes (DST) because major U.S. technology companies are the targets of these taxes. She would listen to the concerns of these U.S. companies but she is still a cautious person who wants to keep her options open. This means she would continue to advocate for the international tax structure negotiated by the Organization for Economic Cooperation and Development (Oecd) as the appropriate solution and, thereby, negate the need for a DST by another country. One acquaintance of the Vice-President said she likes "Keeping doors open".

#### As the Candidate for President of the United States

For the past eight years, the institution of the Presidency has been a key political debate. Mr. Trump campaigns on changing the institution of the Presidency by increasing its power at the Federal Government level, while Ms. Harris looks at changing "public policy" as President and not changing the power of the institution. Mr. Trump talks in a broad and wide sweep about imposing large tariffs on virtually all goods coming into the United States. Ms. Harris sees the financial harm to consumers from tariffs and would then use them selectively as one "tool" in a trade dispute. Looking at the Airbus tariffs that are currently suspended for six years, Mr. Trump would very likely cancel the suspension and reimpose them. Ms. Harris would more likely maintain the *status quo*. Ms. Harris can criticise Mr. Trump's widespread use of tariffs, even though the Biden Administration kept many of the Trump's tariffs in place because, as stressed earlier, a vice-president has to support the President but that does not mean she will carry forward Mr. Biden's approaches and policies.

Remembering that Ms. Harris is an attorney and a highly skilled one, she would be more conservative in her interpretations of some of the U.S. trade laws. The International Emergency Economic Powers Act (Ieepa) provides the President with broad authority to regulate a variety of economic transactions following a declaration of national emergency. Mr. Trump threatened to use these sanctions against Mexico if Mexico did not undertake greater efforts to curb illegal migration into the U.S. at the southern border. He would declare illegal immigration as a national emergency. This would have been an unusual use of the Ieepa and, as an attorney, Ms. Harris would have likely not attempted to use the Ieepa in this way. Moreover, as an attorney she is a listener and one to ask probing questions. Similar to interrogating a witness in court or a testifying witness before a Senate Committee hearing, Ms. Harris will listen for contradictions, for misleading answers, and for inaccuracies. Her questions in cross examination are direct and forceful. During the primary presidential debates in 2020, Ms. Harris declared "I am not a protectionist Democrat."

During her campaign in 2019, she said: "We need to export American products, not American jobs. And to do that, we have to have

#### THE U.S. BUSINESS COMMUNITY AND PRESSURES ON HARRIS AS THE PRESIDENTIAL CANDIDATE.

Not only does a candidate for the presidency need to develop her own public policy positions on trade, and other topics, but she has to be cognizant of the views held in the business community. In mid-September 2024, Aaron Ross Sorkin of The New York Times looked at a survey of 60 prominent business leaders. (In the survey, 37% of respondents identified as Republican, 32% as Democrat and about 32% as independent.) Some key points:

★ **80% expected Harris to win.** As well as the latest findings, CEO surveys conducted by Sonnenfeld during the Trump era have shown how business leaders have been moving away from a tendency to support Republican candidates.

★ **They're optimistic about the economy.** With 84% of respondents saying that the economy was headed for a soft landing. About 10% said that they expected a significant recession, while 6% foresaw stagflation.

★ **They generally favour tariffs.** About 42% of respondents agreed that measures were needed to "protect vital U.S. industries from unfair foreign competition," while 16% said that they strongly agreed.

★ **Two-thirds of executives said that Nippon Steel should be allowed to buy U.S. Steel.** The \$15 billion deal has been held up by political and national security concerns.

Both as part of her candidacy and, if elected, her term in office, the Vice-President needs to be cognizant of these business CEOs' views as she develops and establishes her own trade policy.



a meaningful trade policy." Nevertheless, she has opposed various "free trade" enhancers like Nafta and the Usmca. During her election campaign for the Senate, she initially declined to take a position on the pending Trans-Pacific Partnership (TPP), but later came out against it because it lacked adequate safeguards for workers and the environment.

#### The Future, If Kamala Harris is Elected President

In my view, a President Harris would be a thoughtful listener to her advisors and other world leaders and constantly evaluating "What does that mean in real life? How are individuals affected by the consequences of adopting one policy over another?". As an attorney and a prosecutor, she knows how to ask the tough questions and evaluate the responses she receives. Trade is a field where she is still developing her overall views. She is keeping her doors open. We only have some "little crumbs" of the pastry she will bake in global trade policies. (But we know that she will pair the pastry with the right wine).

In an interview with CNN Jake Tapper, Ms. Harris said: "I believe very strongly that we have to have policies that understand that, as it related to the issue of trade, as it relates to the issue of various countries, including China, that we have to supply and equip the American worker with the skills and resources that they need to thrive, no only survive, but thrive."

Trade policy will be segmented in a Harris-Walz Administration. Trade with Europe will be viewed differently than trade with China or trade with India. While on the Senate Intelligence Committee, Senator Harris said of China: "They steal our product, including our intellectual property. They dump substandard products into our economy. They need to be held accountable". But she also favours trade sanctions by an alliance group of countries as opposed to unilateral action by the U.S. Despite her heritage ties with India, she has not shown how she might deal with that country on trade issues and more generally on national security efforts. Her roots in California are important too and should not be overlooked. Ms. Harris grew up in an economic powerhouse State and a State that had the infrastructure and economy much like that of a country or nation. In the 1960s and 1970s, the phrase was common: "As goes California, goes the Nation". She understands "massive" in public policies and government programs. Unlike many former Presidents, she would not be overwhelmed by the powers of the Presidency and would recognize the impacts, roles, and responsibilities of a major nation. Even though Ms. Harris is still developing her global trade agenda, looking back at the Vice-President's careers and roles, the foreign wine industry has far less reason to fear a President Harris than a President Trump. In a little over one month from now, we will know the answer from the voters who have spoken.







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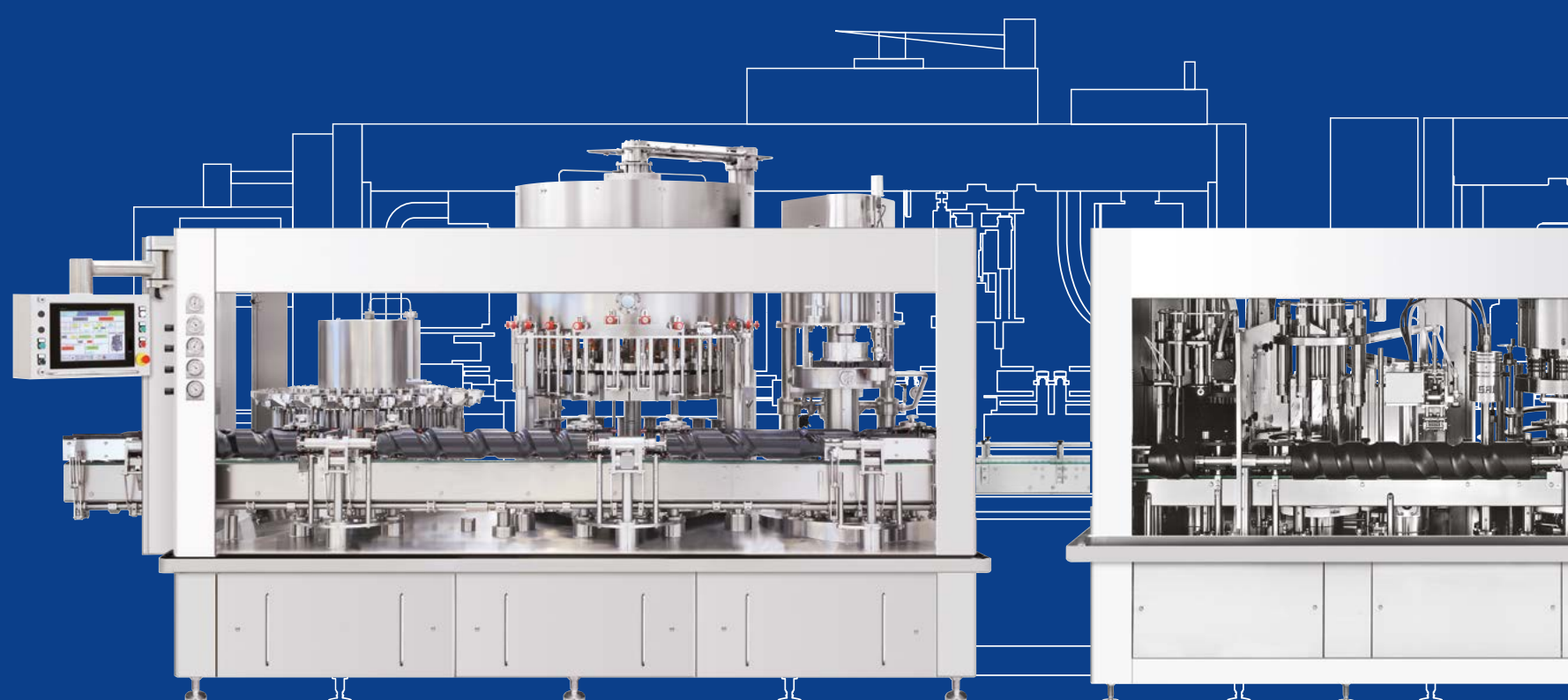


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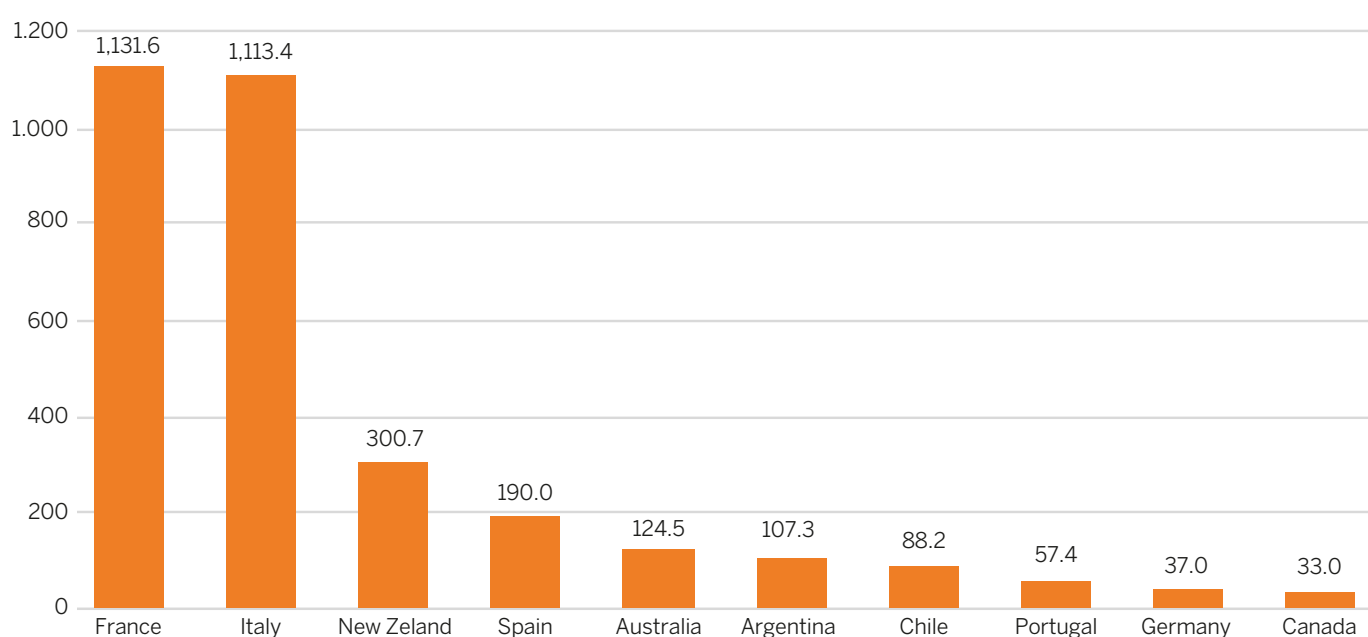
DATA FOR THE FIRST HALF OF 2024, COMPARED TO 2023

# Small but **SIGNIFICANT** **RECOVERY** in **U.S. IMPORTS**

*Bottled wine and sparkling wine volumes are rising, while bulk wine and bag-in-box are falling. France and Italy continue to lead the way. The former in value terms (albeit down -10% on the previous year) and the latter in volume terms (+4.5%) with continued growth in turnover (+5.7%). These two countries account for 68% of wine imports by value. Exporting mainly high-end wines, New Zealand ranks third by value. The US also buys a lot of wine from Canada, the second largest supplier by volume, but mainly in bulk and at low cost. Spain and Australia are struggling, while Argentina and Chile are showing dynamism. European sparkling wines dominate, with 98% of bottles coming from France, Italy and Spain*

By PAOLO FERRANTE

1. Top-10 suppliers into the USA (mln \$ - Jan-June 2024)



Source: OEMV from US Census Bureau data

**S**mall jump for US wine and sparkling wine imports in the first half of 2024. According to the US Census Bureau, the US imported 633.8 million litres in the year to June, a fractional increase of 0.7% compared to the first half of 2023. The 3.6% fall in average unit value, mainly due to negative price dynamics (which may also reflect a shift towards cheaper types), held back import expenditure, which fell 3% to USD 3.29 billion. The US is the world's leading importer of wine in value terms, with a 17% share of the global market (12.5% in volume terms). The trend in imports to the United States is significantly better than in 2023, a year that closed with a sharp reversal in volume terms (-14.6% and imports of 1.23 billion litres) and an equally sharp fall of 8.5% in currency terms (USD 6.69 billion), after a period of great dynamism in the two years following the pandemic in 2021-2022.

A detailed analysis of physical flows from January to June 2024, carried out by the Spanish Wine Market Observatory (Oemv), shows an increase in imports of bottled still and sparkling wines. A dynamic that compensates for the contraction observed in the bulk circuit and the decline, albeit more limited, in the bag-in-box circuit.

Sparkling and bottled wines fell in value due to a general fall in prices. Expenditure on bulk and bag-in-box imports increased, reflecting a

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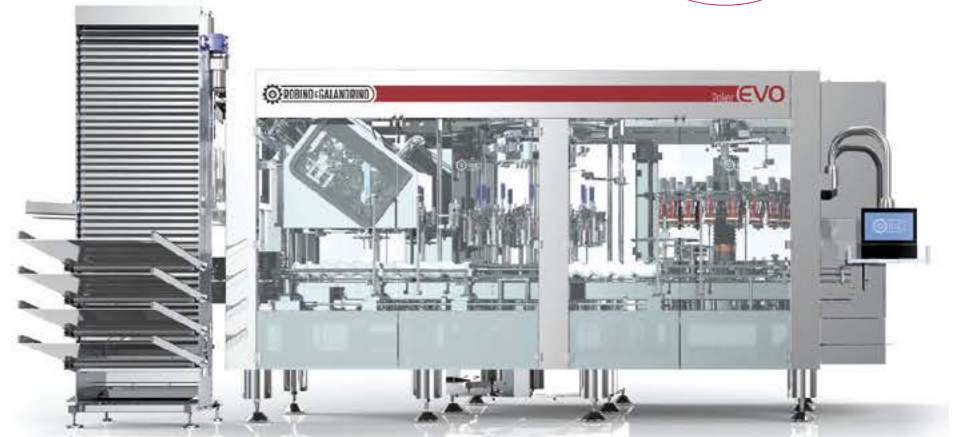
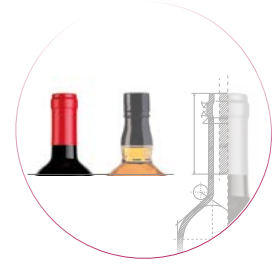


## Zenith **EVO**



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

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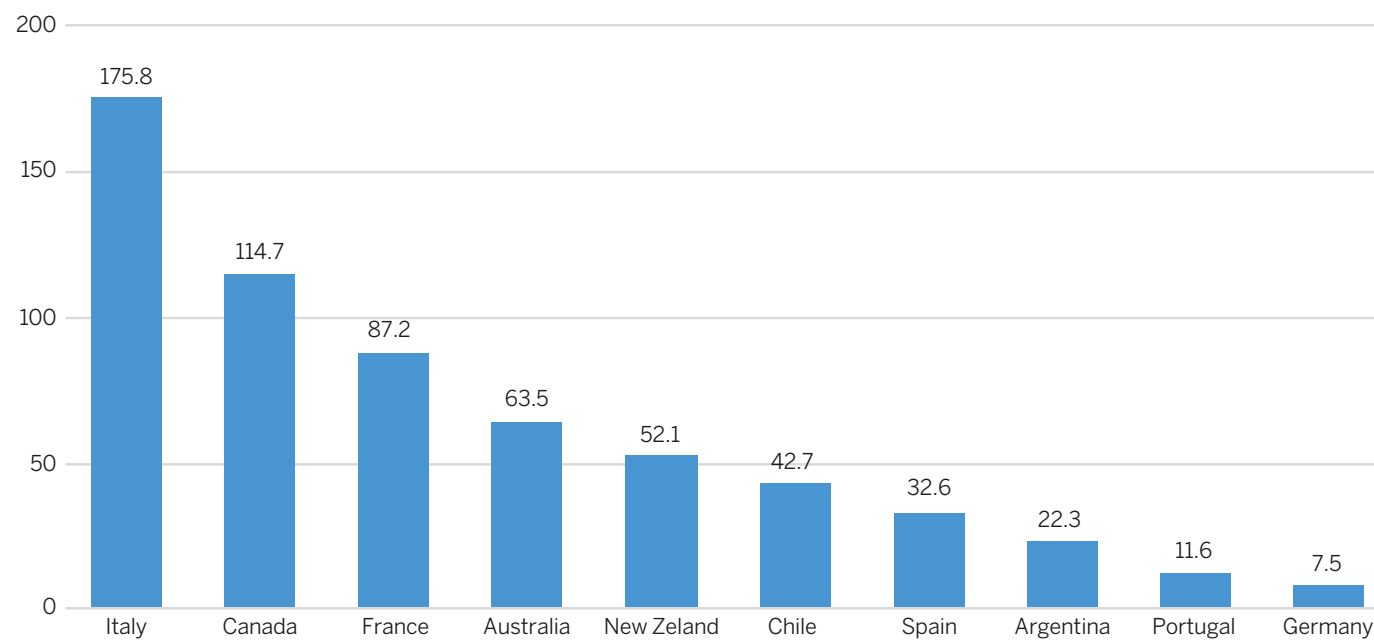


Based on the most advanced electronical and digital componentry, the **SNIPER** platform developed by **R&G** gathers the vision systems performing the detections and recognitions essential to implement orientation, alignment and centring. The system features a dedicated easy and flexible interface to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



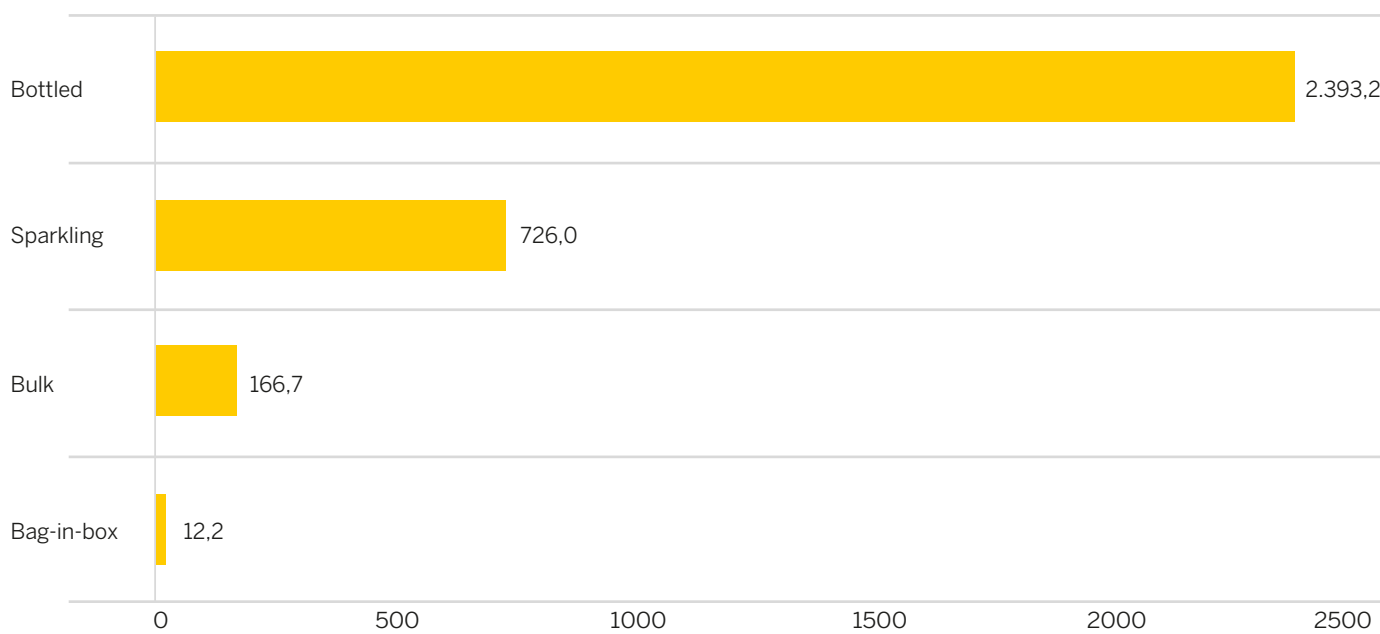


2. Top-10 Suppliers into the USA (mln litres - Jan-June 2024)



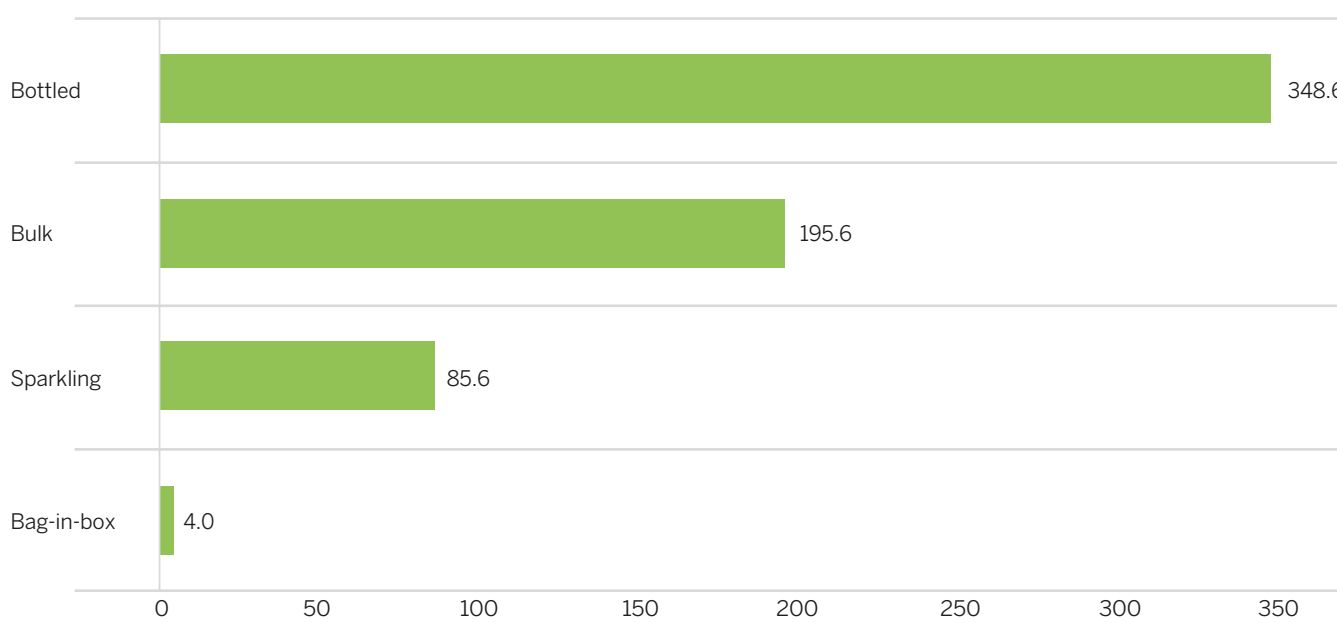
Source: OEMV from US Census Bureau data

3. U.S. Wine Imports By Type (mln \$ - gen-giu 2024)



Source: OFMV from US Census Bureau data

4. U.S. Wine Imports By Type (mln litres - Jan-June 2024)



Source: OEMV from US Census Bureau data

➔ revaluation of average unit values compared to last year. Figures for the first half of the year show volume increases of 3.1% for bottled wine (438.6 million litres) and 4.7% for sparkling wine (85.6 million litres), while bulk (195.6 million litres) and bag-in-box (4 million litres) closed with year-on-year declines of 4.9% and 0.9% respectively.

Of the 66 countries that exported to the US during this six-month period, France remains the leader with USD 1.13 billion, despite suffering the second largest drop in value (-10% compared to the first half of 2023) after New Zealand (-12.2%). Italy falls to second place in terms of value with USD 1.11 billion (+5.6%), while maintaining its lead in terms of volume with 175.8 million litres (+4.5%). With 114.7 million litres (+0.4%) in the first half of the year, Canada is one of the country's largest suppliers, selling mainly low-cost bulk wine. It remains second in volume behind Italy, but falls to tenth in value. France grew by 1.9% in volume, moving up to third place with 87.2 million litres. With an average price of \$12.97 per litre, French wines remain the most expensive on the market, even after taking into account an 11.7% drop compared to the same period last year. Italian wines follow with an average price of \$6.34/litre (+1.1%), less than half that of French labels. France and Italy alone account for more than two-thirds (68%) of the total value of wine and sparkling wine imports to the US. New Zealand, which exports mostly high-end wines, ranks third with USD 300.7 million invoiced in the year to June. Spain is a distant fourth position, with imports from the US reaching USD 190 million (+1.8%) in the six-month period, while Australia, fifth in the ranking, fell by a hefty -9.6% to USD 124.5 million. Two New World suppliers, Argentina and Chile, moved up in the top ten rankings. The former moved up to sixth place with USD 107.3 million (+1.2%), while Chile strengthened its position in seventh place with the best performance (+11.8%) with a value of more than USD 88 million.

**Sparkling Wines, European Superstars**

Sparkling wine is dominated by the trio of Italy, France and

Spain, which account for 98% of the market. However, there are significant differences between the three major competitors. Only Italy managed to grow in terms of volume, consolidating its leadership with 58.2 million litres (+8.1%), widening the gap with France to 16.2 million litres (-1.1%) and Spain to 9.5 million litres (-1.9%). With recent inflation and falling purchasing power restricting consumption in the United States, Champagne has become too expensive. As a result, the total value of French bubbles for 2024 has seriously eroded (-22.2%) over the first six months of 2023.

The French continue to lead the way with USD 353.7 million, but the Italians are keeping up with USD 317.3 million (+6.6%),

thanks to the popularity of Prosecco. With less than USD 45 million (+6.8%), Spain retains a minority share despite the downward trend in the market. A very large price differential remains between French sparkling wines, imported into the US at an average of 21.8 dollars per litre, and Italian and Spanish sparkling wines, which are quoted at 5.46 dollars and 4.70 dollars respectively. With much smaller volumes, Germany is the fourth largest supplier to the US market, with growth of almost 25%.

**Italy's dominance in the bottled sector**

In terms of bottled wines, Italy overtook France with an increase in value of 5.1% to 791 million against 766 million

(-3.6%) for the latter. In terms of volume, both countries recorded growth, with Italy firmly in first place with 110.6 million litres (+2.5%) against France's 68.2 million (+2.1%). Despite a fall of -22.3% in the first half of the year, New Zealand remained in third place in terms of value with USD 224.5 million. Spain was stable, Argentina ahead (+1.4%) and Australia slightly down (-1.1%). In terms of volume, New Zealand lost third place to Australia (-1%) with 31.5 million litres (-19.5%).

In terms of price competitiveness, Chilean bottled wines (+40%) are now in fifth place, ahead of Spain (-0.2%) and Argentina (-1.5%). In the bag-in-box sector, French wines overtook the Italians this year with

1.2 million litres (+21.4%), down from 1.1 million (-15.8%). Canada remains the leader in the bulk sector with 114 million litres (+0.6%), well ahead of Australia (-30.3%) and New Zealand (+15.4%). It is followed by Chile (+5.7%) and Italy with 5.9 million litres, an increase of 12.1% on the previous year.

**The Stock Effect and Changes in Consumption**

After the extraordinary recovery in world trade following the pandemic, the wine sector has suffered an unprecedented setback over the past twelve months, similar to the 2008 financial crisis and the 2020 pandemic.

Many analysts believe that overstocking in the US largely explains the 2023 halt, although other structural factors may also be at play. The US is the world's largest market by value and the third largest by volume. Therefore, trends in wine imports to the US can have a significant impact on the global trade balance, the OeMv said.

This year's figures for wine imports to the US show that the sharp decline recorded in 2023 has eased considerably. Volumes have stabilised and are broadly in line with last year's levels. Values have fallen again, but this is due to a disinflationary effect. The question remains whether last year's decline was isolated and temporary, due to overstocking, or whether unplanned surprises in the second half of the year could reverse the slightly positive trend in volumes over the past six months.

A very likely scenario, analysts say, in a market that shows no strong signs of recovery, especially if excess stocks are accompanied by a further drop in consumption. Data from the Wine Institute shows a significant drop in US wine consumption between 2022 and 2023, with per capita consumption falling from 12 to 10.1 litres.

There is therefore another, potentially deeper and more worrying cause than overstocking associated with the decline in wine consumption in the US market. It is a structural change that reflects greater concern about the health effects of alcohol consumption, particularly among younger people, and one that also reflects economic choices driven by constraints on family budgets.





# RED WINES

## Balancing Freshness and Aging

ARE NEW TASTE TRENDS AND CLIMATE CHANGE THREATENING WINE LONGEVITY?

By GIULIO SOMMA and FABIO CIARLA

*The search for modern wine styles that appeal to today's consumers is reshaping the winemaking landscape. But could this shift compromise the aging potential of wines? We took a deep dive into this issue with some of Italy's top sommeliers and leading producers from renowned red wine regions. A quiet revolution is transforming Italian red wines, with winemakers moving away from oak-barrel aging as the key to longevity and focusing more on the vineyard itself. As renowned enologist Luigi Moio puts it, "Barrels are useful for aging, but the real secret to a wine's longevity lies in the vineyard and the grapes"*

**I**n the ongoing debate around the new styles of red wines gaining popularity in Italy and beyond, the issues of longevity and aging have yet to be thoroughly explored. The pursuit of fresher, more vertical, and lighter wines, aimed at capturing the interest of younger consumers and recovering lost market segments, raises questions: Are we sacrificing the aging potential of great wines in the process? Are these faster-to-market wines, designed for early consumption, compromising the tradition of long-term aging—an essential aspect of prestige, history, and winemaking technique? And finally, does long aging depend more on winemaking methods or the terroir?

#### The Question

These concerns are more widespread than many realize, not just among producers and enologists but also among passionate wine lovers. They stem from the awareness that we are witnessing a new revolution in Italian wine, driven by the need to follow or chase market trends that, while fashionable, are still not fully understood.

In just a few years, the dominant style of the last 30 years, characterized by the use of barriques (a philosophy closely tied to Robert Parker's influence), has been abruptly replaced by a new style. This new trend abandons opulence, concentration, and high alcohol levels in favour of lighter, fresher, more vertical wines ready to drink sooner.

As a result, those accustomed to wines known for their aging potential, which was once associated with an oenological paradigm now seemingly relegated to history, are left wondering: What is the future for long-aging red wines? To answer this, we turned to some of Italy's most respected sommeliers and producers, asking them to reflect on the great red wines of tomorrow.

The outcome is reassuring: there is a growing awareness that the new generation of prestigious Italian red wines has successfully navigated this crossroads, with positive results that some, though not all, confidently embrace. Additionally, an intriguing shift in tasting philosophy has emerged: where once drinking a young red wine destined for long aging was considered "infanticide," today there's a new trend suggesting that a great wine can also be enjoyed in its youth.

#### The Answer: Harmony Beyond Chemistry

The strong engagement of some of Italy's top producers and technical experts in our survey underscores that, while the issue may seem resolved in theory, it remains a significant and ongoing topic in market discussions. Perspectives from figures like the renowned oenologist Professor Luigi Moio, President of the OIV, highlight the skill required to balance freshness and liveliness in taste with complexity, richness, and the capacity for long aging. This broad recognition reflects how the quiet revolution transforming the identity of Italy's finest red wines has indeed found the right solutions.

The key to longevity isn't found in the use of oak barrels, as many believe, but in a deep connection to and respect for the vineyard and its terroir. It's the harmony of elements within the grape—far beyond basic chemical balance—that truly determines a wine's aging potential.

As MW Andrea Lonardi points out, there's an often-overlooked narrative.

"Aging, contrary to popular belief, is deeply rooted in Italian tradition," he said. "Not just culturally or in terms of production, but Italy boasts more grape varieties and terroirs suited for long-aging wines than any other country, even France."

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# Barriques

## The Debate Between Longevity and Terroir

WOODS, AGING, CLIMATE CHANGE, AND NEW CONSUMER TASTES: AN EXCLUSIVE INTERVIEW WITH LUIGI MOIO



By GIULIO SOMMA

**I**n the process of “designing” a long-aging wine, winemaking choices play a fundamental role, especially during the critical aging phase. The selection of the vessel for maturation and finishing is a delicate decision that should be guided by knowledge and scientific awareness in the service of the final product.

For the past three decades, wine has been chasing opulence, concentration, and alcohol content. But today, the market is undergoing a revolution, with consumers seeking fresher, lighter, more vertical wines that are ready to drink sooner. This shift has led winemakers to rediscover vessels like concrete and amphorae while moving away from the once-dominant barrique, now considered outdated by many.

However, some still see the barrique as a crucial tool in producing wines that can age well. Sommeliers and fine wine experts have raised questions about the longevity of wines from Italy's great regions produced in recent years. These are valid concerns, prompting a necessary and stimulating dialogue within the industry. Here, we focus on the barrique and the perception that, in the past, it was used to follow trends. Today, the movement is swinging in the opposite direction, with some exaggerating the push for fresh, vertical wines. Many analysts and wine communicators agree there's truth in this shift, but it doesn't fully address the more complex issue—the future of Italy's great red wines.

Professor Luigi Moio, President of the OIV and a winemaker himself, offered his insight on this topic. His take rehabilitates the barrique as a tool, but places the grape and the terroir at the center. Without them, it's impossible to produce a truly important and long-lived wine.

### The Beginnings: Bordeaux and Robert Parker

“Riding the wave of Bordeaux wines and the early books on Bordeaux written by Robert Parker—a great critic but also an exceptional communicator, capable of writing some of the best wine guides I've ever come across—everyone followed the example of Bordeaux producers,” Mr. Moio acknowledged. “After all, there's no denying that France has been the reference point for decades for anyone wanting to produce quality wines.” He went on to emphasize that often the consequence was “Imitating the Bordeaux model without a solid technical or scientific foundation, simply copying French savoir-faire—particularly from Bordeaux—resulted in errors along the way.”

The problem, therefore, wasn't the barrique itself but how it was used, often improperly, resulting in wines dominated by the ‘aromatizing’ action of the small barrels, masking the wine's true characteristics.

The barrique isn't intended to impart a woody aroma to the wine, but rather to introduce specific tannins and make use of the wood's porosity. These characteristics, especially in oak, work in synergy to speed up the co-pigmentation process between anthocyanins and tannins, ultimately enhancing colour stability in red wines. The barrique is essentially a technological tool that must be handled by professionals who fully grasp its nuances. When used correctly, it can yield red wines that are fresh, long-lived, and maintain a vertical profile. The barrique does not compromise a wine's verticality; in fact, it's entirely possible to craft Bordeaux-style wines with more freshness while still utilizing this vessel during the aging process.

This makes it clear that the idea of “richness equals longevity” is not entirely accurate. A closer look at

Even the renowned regions that produce wines known for their longevity are now shifting toward crafting more vertical, fresh, and ready-to-drink wines, as the market demands. The use of barriques, once central to winemaking, is often being set aside as part of an outdated paradigm. But is this really the case? Not according to Luigi Moio, President of the International Organization of Vine and Wine (OIV): “Barriques are certainly useful in producing wines meant for aging, but it's not the barrel that makes a wine long-lived—it's the terroir and the grapes. The foundation of a wine's aging potential lies in the relationship between the plant and the soil.” And the barrique must be used properly

the history of the barrique sheds light on why. “The barrique is not just a symbol of Bordeaux but also of Burgundy,” Mr. Moio explained. “It's a traditional winemaking method in these regions, recognized for its high quality. However, it's important to understand this within its proper context. In Bordeaux, grape varieties such as Cabernet Sauvignon, Cabernet Franc, Merlot, and Petit Verdot have long been the tradition, whereas in Burgundy, it's Pinot Noir and Chardonnay. The use of barriques for aging white wines is a signature feature of Burgundy's Côte d'Or. Over the past thirty years, Bordeaux has gradually embraced barrique aging for white wines, especially with Sauvignon Blanc, incorporating lees aging to enhance volume and density. These two regions, home to some of the world's most iconic and expensive wines, have set the benchmark for other areas aspiring to achieve similar success and craft exceptional wines.”

### Italy: The Influence of Tachis and Gaja, and What Followed

When looking at Italy's wine scene, beyond passing trends and with the technical insight of two pivotal figures in its history, it's clear that “it's no accident that barriques were first introduced in the Langhe by Angelo Gaja, and later spread to Tuscany through the work of the legendary Giacomo Tachis. At that time, barriques were used strategically and for specific goals. However, they soon became fashionable. Everyone jumped on the bandwagon without fully grasping their purpose, leading to a market saturated with overly oaky and unbalanced wines. Then, another issue surfaced: climate change. The composition of grapes, especially early-ripening varieties, started to shift, with acidity levels dropping and pH levels rising. This forced producers to reconsider how they use barriques, as the critical process of micro-oxygenation could disrupt the wine's intended qualities under these new conditions.

“Still, barriques are only part of the equation,” Mr. Moio said. “Over the years, I've noticed that many have misunderstood their role. Some believed that using a barrique alone would guarantee a great wine, regardless of vineyard management, enological potential, or winemaking expertise. This belief was entirely misguided and led to many of the problems we've seen. The secret to a wine's longevity lies in the balance between its chemical and biochemical elements, which must already be present in the grape. You need a healthy, perfectly ripe grape bunch, with enological potential that aligns with critical parameters: acidity, pH, sugar content, the bal-

ance of polyphenols, and aromatic precursors. Not every red wine is suited for aging, especially since in hotter climates, grapes can over-ripen, reducing acidity and raising pH levels—two factors that hinder a wine's aging potential.” In essence, a wine's longevity depends on the interaction between the grape variety and its terroir. It's the synergy between the plant, the soil, and the climate that forms the basis of a wine that can age.

As Mr. Moio put it, “Today, with advanced wine making knowledge available worldwide, you can make good wine almost anywhere. But great wines, those that stand the test of time, can only be produced where there is perfect harmony between the vine, the soil, and the environment, always through the hand of man.

“In these cases, if you aim to craft an age-worthy wine, it's possible to make wines that are both fresh and low in alcohol,” he explained. “Take Burgundy as an example: Volnay and Pommard, two communes in the Côte de Beaune, are geographically close, yet they produce distinctly

different wines. Volnay wines are light in colour, with barely noticeable tannins and elegant red fruit aromas, while Pommard wines are more tannic and robust, due to the higher clay content in the soil, which, when combined with limestone, creates wines with concentration and structure reminiscent of Bordeaux. Yet both are long-lived and capable of aging gracefully.” “If we look at alcohol levels, Italy offers important examples, he noted. “In the 1960s, wines made from Sangiovese, Aglianico, or Nebbiolo rarely reached 13% alcohol, and in some cases, remarkable bottles from that era are still being enjoyed today.”

### Alcohol, Oak, Longevity, and Freshness. A Complex Balance

To put it simply, just as using small oak barrels or having higher alcohol content doesn't ensure a wine's longevity, freshness and lower alcohol levels don't hinder its ability to age well.

Plenty of white wines demonstrate this. Riesling, for instance, has strong aromatic precursors, which are crucial for aging. Without them, a wine's aromatic profile fades over time, especially as oxidation naturally occurs. Other white wines with notable aging potential include Gewürztraminer, Chardonnay, Sauvignon Blanc, and Italy's native varieties like Verdicchio, Vermentino, Fiano, Greco, Falanghina, and Carricante. These wines typically have alcohol levels between 12.5% and 13.5%, yet age beautifully.

Thanks to our deeper scientific understanding of the chemical and biochemical makeup of grape varieties, we can now craft fresh wines with aging potential that don't require long cellar time before hitting the market. Ultimately, wines that aged well in the past still do today, and those that didn't won't suddenly start to.

Mr. Moio highlights the biggest current challenge. “Climate change,” he said. “In certain terroirs, some grape varieties may struggle under today's conditions. Viticulture needs to adapt, starting with clonal selection. In the 1930s and 1940s, when ripening was difficult, clones were selected for their ability to accumulate more sugar. Today, we need clones that don't accumulate too much sugar, while maintaining optimal acidity and pH levels at maturity. While the market demands lower alcohol wines, the climate makes that harder to achieve. Yet reducing alcohol doesn't compromise longevity—longevity is more about the grapes' enological potential and the viticultural choices made. This is where future agronomists and winemakers need to focus their efforts.”

In ten years, we'll still be enjoying exceptional wines from recent vintages. The real question is not how to make wine, but how to adjust to changing conditions.

“There's no need for new technology to make fresher wines—it's about choosing the right grapes,” Mr. Moio noted. “Otherwise, we risk shifting the conversation to processing and food technologies. But great wine, especially at the highest quality, is an agricultural project. Winemaking is pure agriculture, and the knowledge of viticulture requires thoughtful decisions that are essential to the enological goal. These choices can no longer be made carelessly—you can't plant vineyards wherever you want and expect to produce wines that will age well.”



Luigi Moio





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# The New Reds. Evolution or Revolution?

Crisp, fresh, and ready to drink—these are the qualities shaping today's red wines in fine dining. Is the era of iconic, long-aged bottles over? With warmer seasons, evolving culinary trends, and growing preferences for lower-alcohol wines, the red wine market is undergoing a transformation. What does this mean for the future of reds on top-tier wine lists? Will reds with a deep-rooted history still hold their place? Fear not, say sommeliers: modern winemaking is discovering a “third way” that harmonizes freshness with aging potential

By GIULIO SOMMA and FRANCO SANTINI

**I**n today's wine world, a breeze of change is sweeping through vineyards and cellars, redefining the character of red wines that have long been benchmarks of excellence. Once synonymous with power, structure, and longevity, these iconic reds are now at a turning point. On one side, the tradition on which they built their global prestige; on the other, the evolving demands of a rapidly evolving market.

The central question—both in the cellar and at the table—is as profound as it is simple: can red wines retain their historic identity in the era of “ready-to-drink” wines? This, along with other concerns about the future of red wine, shaped our investigation, which examines the delicate balance between the challenges faced by sommeliers and the technical, economic, and cultural shifts confronting winemakers today.

Behind closed doors, we've heard a recurring worry from distributors, restaurateurs, and industry experts alike: today, we savour remarkable bottles from the '80s, '90s, and even 2010-2015. But in ten years from now, will we still be enjoying great bottles from the 2020s? Or is the push for lighter, more immediate wines threatening the ability to age gracefully?



**Matteo Zappile**

**M**atteo Zappile from Il Pagliaccio restaurant in Rome noted that, “What's often left unsaid is that many wineries, even those with ample stock, can no longer afford to age their wines. As a result, they're compelled to bring bottles to market more quickly, ensuring they're ready for sale sooner. However, this approach risks diluting the character of some of our country's most esteemed red wine denominations.”



**Gianni Sinesi**

**W**ho manages the wine list at Niko Romito's Reale in Castel di Sangro in Abruzzo, echoes this sentiment. “Red wines aren't in crisis—they're simply evolving,” he said. “High-end labels are still considered luxury items, while the broader red wine market is undergoing a generational shift, reflected in changing consumer preferences. More than a shortage of great wines, what we're missing today is the certainty of a long-term outlook. With so much uncertainty in the world, who knows where we'll be in 20 years? That's part of it. I want to enjoy an exceptional bottle now and appreciate what's available today.”

CASADONNA | reale



Credit: Andrea Sironi

**Jacopo Dosio**

**A** more optimistic perspective comes from Jacopo Dosio, sommelier at Piazza Duomo in Alba. “In the Langhe, our style hasn't really changed,” he said. “We've simply returned to tradition. Unlike Bordeaux, our wines haven't lightened up; we've just moved past the heavy ‘Parkerization’ phase, getting back to wines that truly reflect our terroir.”

PIAZZA DUOMO  
ALBA, ITALY



Credit: Leticia Cipriani

CRACCO

**Gianluca Sanso**

**G**ianluca Sanso, restaurant manager and head sommelier at Ristorante Cracco in Milan, agrees that there's a growing demand for fresh, ready-to-drink wines, as well as alcohol-free options.

“It's hard to predict how today's wines will evolve,” he noted. “I think it's unfair to compare them to the historic vintages that shaped enology. With today's fast-paced world, certain wines may be at a disadvantage compared to the more accessible, youthful options that consumers prefer.” Every era, he suggests, has its own wines and its own standards of quality.



**Eros Teboni**

**S**ommelier and consultant Eros Teboni emphasizes that the issue should be examined on a denomination-by-denomination, region-by-region basis. “It's not accurate to generalize that the trend towards more immediate, market-ready wines is a threat to longevity,” he said. “In many cases, wine still needs time to mature in the bottle and rushing that process can risk compromising its integrity.”







**Paolo Porfidio**

**P**aolo Porfidio, head sommelier at the Excelsior Hotel Gallia in Milan, touches on market segmentation, noting that major wine denominations aren't experiencing drastic shifts. However, as an enologist, he sheds light on some often-overlooked technical advancements. "Compared to the past, we now have the knowledge and technology to create wines that are highly refined and ready to enjoy immediately upon release," he said. "While these great wines can be appreciated right away, they remain complex and capable of aging and evolving—perhaps even more consistently than before—thanks to innovations like advanced bottle closures."



**Paolo Lauciani**

**L**astly, Paolo Lauciani, a seasoned sommelier instructor, contemplates the "risks" of waiting. "I'm noticing a growing impatience with waiting for top wines, only to discover that after 20-30 years in the cellar, some bottles have passed their prime," he said. "A great wine can be exceptional even when young. Of course, if it's too young, it might not yet showcase all its positive characteristics, but if you wait too long, you risk missing out on its peak. I'm convinced that the world's most renowned wines are remarkable even when consumed early. They will undoubtedly evolve, but the key is having the right bottle at the right time."



*Italian wine is undergoing a third revolution, one that starts in the vineyard and responds to shifting consumer preferences. The days of relying solely on barriques are over. Today's new wave of red wines strikes a balance between freshness and agility, while still offering complexity, depth, and the potential for long aging. Yet, as always, it all comes back to the terroir—and this approach doesn't work in every region. Longevity has taken on new forms and meanings, shaped by a "new awareness" among winemakers who are reassessing the effects of climate change, which isn't always a harbinger of doom. That said, there are still challenges ahead, from rising prices to the pressure of meeting critics' expectations.*

By GIULIO SOMMA and FLAVIA RENDINA

**W**hat defines a great red wine? Fifty years ago, we would have highlighted tannins, austerity, and aging potential. Twenty years ago, the focus shifted to softness, concentration, body and power. Today, words like crispness, freshness, agility and tension are becoming more common when describing red wines. This isn't a matter of confusion; it reflects the fact that the wine world has undergone at least three major transformations over the last half-century, reshaping agricultural practices, winemaking choices, grape varieties, and how they are expressed. These changes clearly show how inaccurate it is to talk about "tradition" in the context of Italian wine. Not enough time has passed to truly call one winemaking style traditional over another. Italian wine was essentially reborn in the '70s with modern enology and the rise of key regional brands. It began to expand globally in the mid-80s, creating labels that catered to the

demands of markets, particularly the American one, which were far removed from the local style and potential. Since the early 2000s, the key elements of Italian winemaking, like the use of barriques, have gradually fallen out of favour, giving way to a third era where climate change, changing eating habits, the natural wine movement, consumer crises, and even conflicts are dictating a new way to making and enjoying wine.

**Reds. Now and Then**  
It's clear that today's red wines are generally more approachable and ready to drink than those of the past. Whether this is a positive or negative development depends on how the wine achieves that state. Being ready to drink doesn't necessarily mean a wine lacks complexity. It's possible to lighten a wine without stripping its character, to modernize without losing its soul. However, sometimes it's simply a matter of waiting for the palate to come

back around to certain styles. We're left questioning the role of longevity as an inherent value in wine. Some wines are naturally suited for immediate enjoyment and special occasions, and they don't fit neatly into the paradigm that equates longevity with quality. Others, despite initial promise, may not have benefited from aging as expected. A prime example, according to several producers, is the "muscular" wines from the late 20th century. Today, many of these wines seem to have fared poorly over time. In our discussions with winemakers, we explored trends, markets, techniques, and economics. But one unifying theme emerged: the impact of climate change on viticulture and, more broadly, humanity. Now more than ever, winemakers are reconnecting with nature, abandoning the arrogance that once led them to believe they could control everything from the cellar. Does this increase costs? Certainly. Does it reduce production? Most likely. But it's the only way forward if viticulture—and ultimately the wines themselves—are to achieve lasting longevity.

**NICOLÒ D'AFFLITTO**

**N**icolò D'Afflitto, winemaker at Marchesi Frescobaldi, speaks of "terroir and harmony" when he explains that, "There's no direct correlation between structure and aging. Just look at the overly structured wines of the '90s that have since collapsed. The secret to longevity lies in elegance and harmony, which come from well-suited terroirs. Over the last 30 years, both winemaking knowledge and technology have advanced. Today, we have tools that allow us to produce wines that fit modern tastes while being even more respectful of the land than before."



**ANDREA LONARDI**

**A**ndrea Lonardi, new Master of Wine and wine business advisor, believes longevity is "a very Italian story." "In 30 years, we'll be drinking wines made today and finding them better than the wines of the past—especially the iconic wines that made history," he said. "They'll be better because they come from a deeper understanding, not because they followed market trends."



**ANSELMO GUERRIERI GONZAGA**

**A**nselmo Guerrieri Gonzaga, CEO of Tenuta San Leonardo, points out that "The wine market is going through a confusing period, and I don't think anyone fully understands it yet." day, we have tools that allow us to produce wines that fit modern tastes while being even more respectful of the land than before."





FRANCESCA ARGIOLAS

Meanwhile, Francesca Argiolas, producer at Cantine Argiolas in Sardinia, advises the industry to be swift yet patient in preparing for change. "Our sector has always gone through periods of transition, especially in terms of evolving consumer preferences," she said. "We shouldn't be afraid, but we can't shy away from addressing it either."



MARCO CAPRAI

Marco Caprai, CEO of Arnaldo Caprai in Umbria, who works with powerful red wines like Sagrantino, acknowledges the evolving winemaking landscape. "For years, we've faced the challenge of crafting wines that are more approachable, softer, refined and fruitier—perhaps even more modern," he said. "This has been the direction of our winemaking for the past thirty, maybe even forty years."



GIAMPIERO BERTOLINI

Giampiero Bertolini, CEO of Biondi-Santi Tenuta Greppo (an iconic Montalcino estate acquired by the Descours family in 2017), reflects on the shift from new barriques and hyper-extractions, saying that, "Today's preference for higher acidity is naturally steering the wine market back toward longevity. In my view, this has put us on the right track, bringing the focus back to the vineyard and the expression of the land, rather than what is crafted in the cellar."



ANDREA FARINETTI

Andrea Farinetti, producer at Borgogno and Fontanafredda in the Langhe, observes how well-meaning intentions can sometimes lead to unintended results. "We've swung from one extreme to another moving from extended macerations to much shorter ones, minimizing extraction to preserve more fruit, freshness, and vibrancy," he said. "Lightening is fine, but wines shouldn't become too thin. We want a 'marathoner' wine—lean, elegant, and built for endurance."



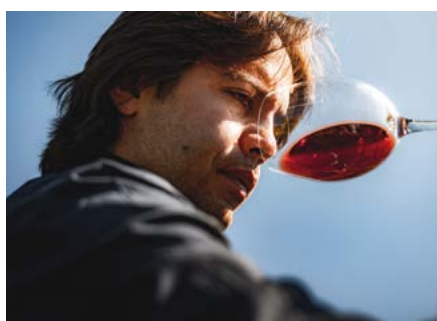
SERGIO GERMANO

Sergio Germano of Ettore Germano winery in Piedmont agrees that "all the parameters have changed, and both vineyard and cellar practices must adapt. For example, it no longer makes sense to drastically reduce yields for concentration, as this risks causing premature ripening." He also suggests a shift in closures, noting, "It's time to seriously consider alternative closures to cork on a larger scale."



BERNARDINO SANI

Back in Tuscany and Montalcino, Bernardino Sani, CEO of Argiano, warns against the assumption that vertical wines lack longevity. "It would be a significant mistake to create wines that are immediately ready, drinkable, and almost mature just to satisfy market demand," he said. "With climate factors like drought and heatwaves already hastening wine readiness, simply following nature without addressing these challenges results in wines that may appeal to consumers with their residual sugar but have no long-term potential."



STEFANO CELI

Stefano Celi of La Source in Valle d'Aosta echoes this sentiment. "There's no denying the trend toward fresher, lighter, and more immediate wines, rather than the heavy, structured ones of the past," he said. "However, producers need to stay true to the terroir and avoid being swept away by market trends. In regions like ours in Valle d'Aosta and mountain viticulture in general, where we produce fresher, lighter wines with more pronounced acidity, we can achieve longevity while highlighting the characteristics unique to our terroir."



**ERO Cane Pruner VITECO XHD**



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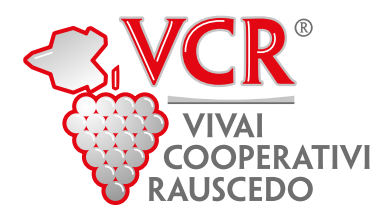


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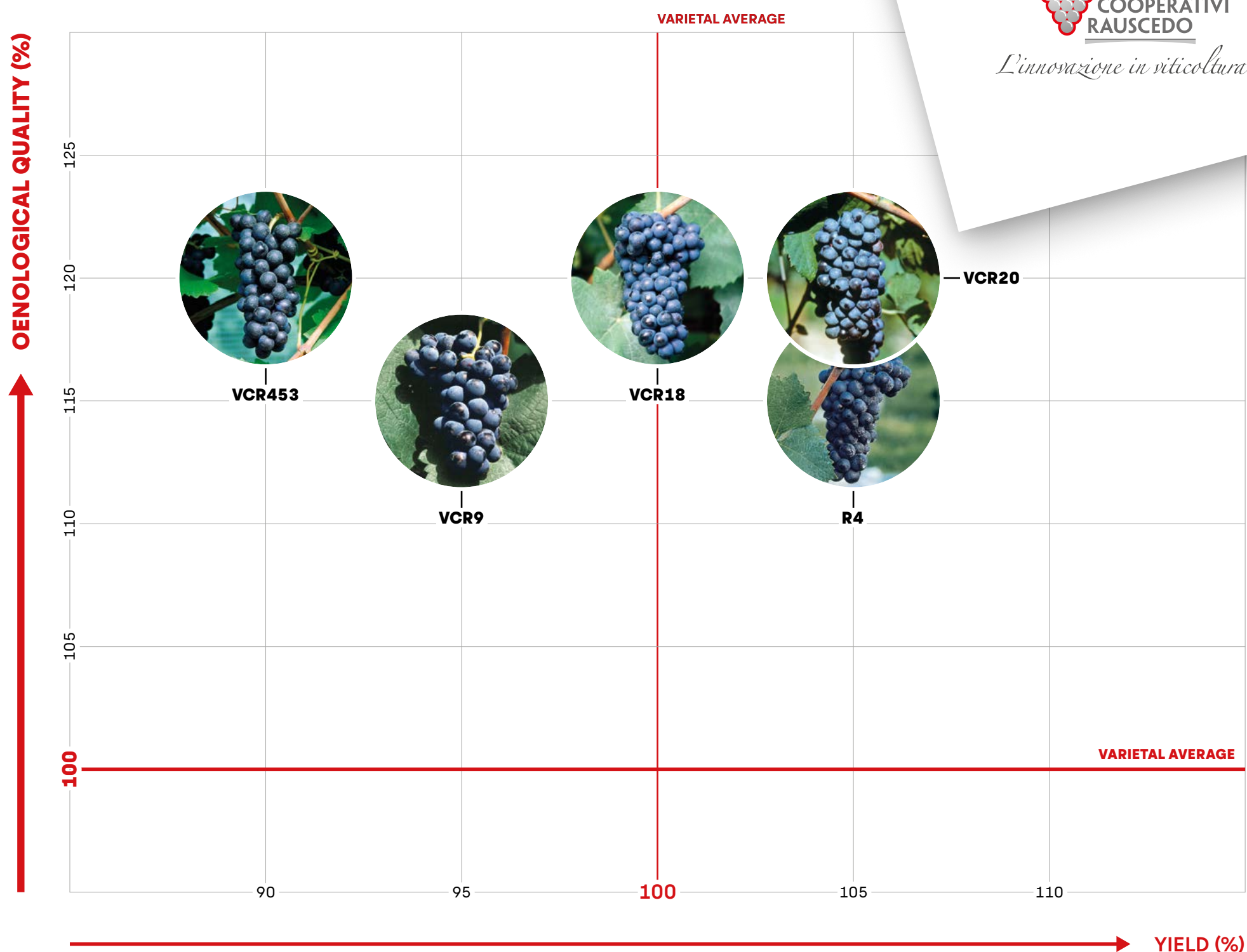
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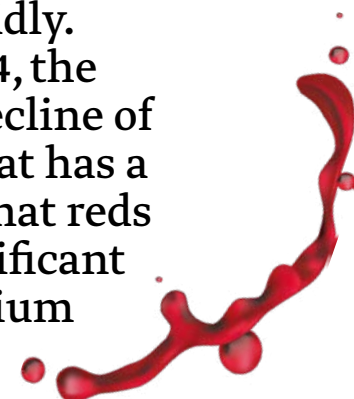


A TREND DATING BACK AT LEAST FIVE YEARS

# RED WINE in Free Fall



Bordeaux, Chianti, Rioja - Germany has long been a strong market for red wines from the European wine-growing nations. But the trend is declining rapidly. In the first half of 2024, the category recorded a decline of 9 percent, a change that has a strong impact given that reds are still the most significant market share of premium wines.



By KATJA APELT

**T**he future of German wine is apparently white - and also a little rosé. Red wine, on the other hand, is no longer in vogue between Flensburg and Berchtesgaden. Demand has been falling for years in the country where the red classics like Chianti, Bordeaux, Rioja and co. were once among the favorites of many wine drinkers.

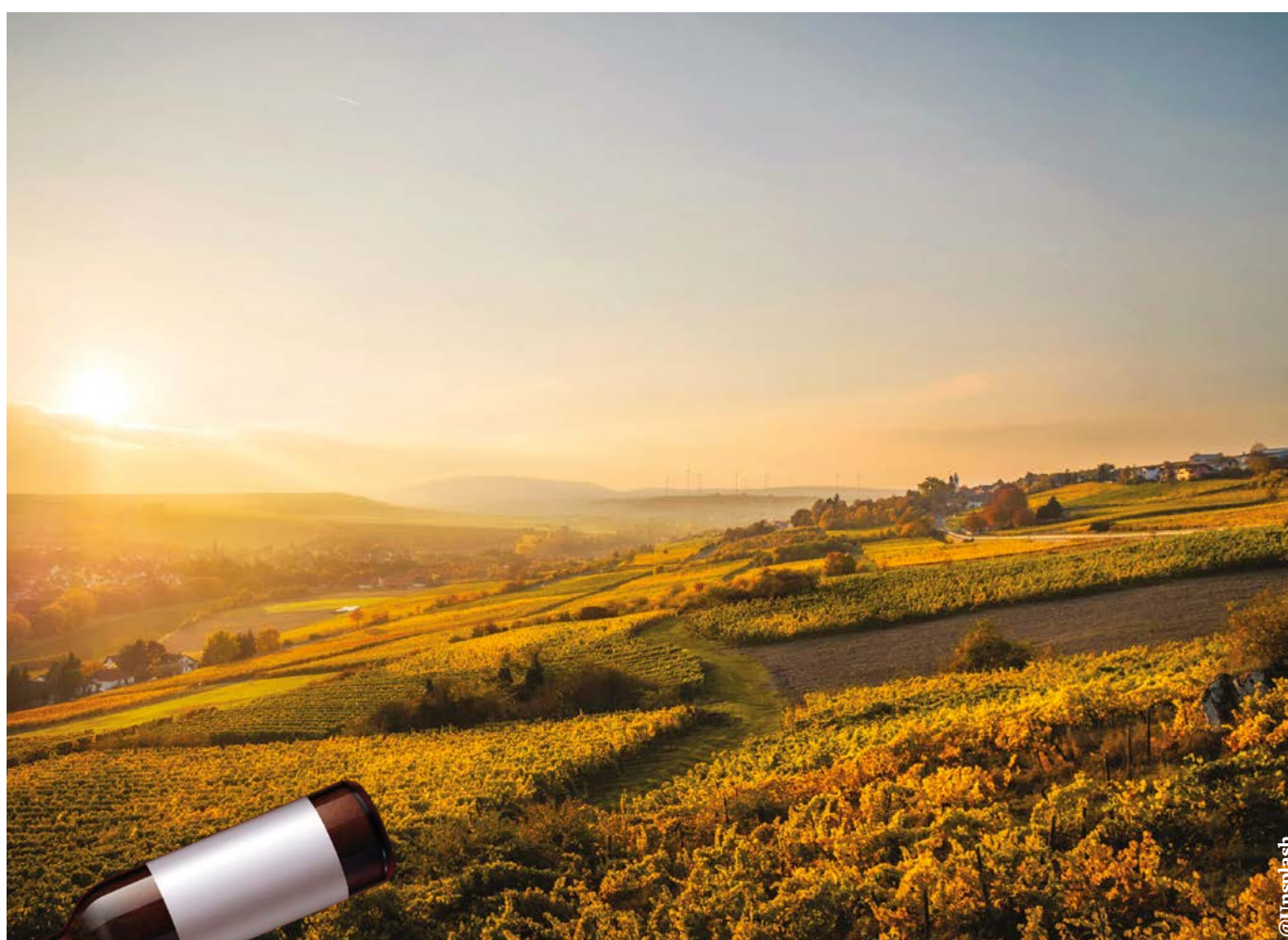
"Demand for red wine has fallen dramatically in recent years," said **Melih Günsel**, head of Weinkellerei Höchst, part of the Bühmann Group, a specialist wine retailer in Frankfurt am Main that has won several awards for its wide range and good advice.

This also has an impact on the product range. "We're not adding many new red wines to our range at the moment," he said.

From Italy, for example, he has included the Marche region to his portfolio. However, not with the red classics from the Montepulciano or Sangiovese grape varieties, such as Rosso Piceno, but with four different white wines from Sartarelli's DOC Verdicchio di Castelli di Jesi in quality levels ranging from Classico to Superiore and Passito.

**The Crisis in Numbers**

Various market research figures also show that red wine is on decline in Germany. In its market and advertising media analysis, the Allensbach Institute for Public Opinion Research, found that the number of consumers who bought red wine in the last 14 days fell by 16% between 2019 (20.05 million) and 2023 (16.69 million). According to figures from market researchers at Nielsen (excluding discount stores), sales of red wine in the German food retail sector fell by 9% in the first half of 2024 compared to the same period in the previous year, which is a significantly disproportionate decline. The overall market fell by 5.3% in the same period. White wine sales, on the other hand, lost below average with 2.9%, as did rosé sales. Here, the decline amounted to 3.2%. According to Niels-



en figures, the overall market share of white wine in German food retail was almost half at 47.9% in the first half of 2024. Red wine still accounts for 39.5%. Rosé is the smallest category at 12.6%. The analysis of the price segments is also interesting. While white wine and rosé in the €3 to €3.99 (white: +7.6%; rosé: +9.7%) and the category above €5 (white: €5-6.99: +8.1%, >=€7: +3.6%; rosé: €5-6.99: +4.3%, >=€7: +4.5%) were able to make gains, for red wine it is only the €5 to €5.99

category (+5.7%) - the price range in which the Doppio Passo brand, which is highly successful in Germany, can often be found during promotions. The Doppio Passo brand from Rotkäppchen-Mumm Sektkellereien GmbH has created a real Primitivo hype in Germany in recent years. It generated the initial attention for the grape variety - and, according to market researcher Circana, is by far the strongest wine brand in the German food retail sector in terms of sales. At 79.4 million euros, it generates more than twice as much turnover as Maybach (Peter Mertes), number 2 in the list of the top ten brands. Sales grew by 11.3 percent in the first half of this year. However, this result is not purely a red wine result, as the brand now has a number of non-red line extensions, such as a Primitivo rosé, white wines from the Grillo and Moscato grape varieties and non-alcoholic variants. Nevertheless, the explanation for the stable €5 to €5.99 segment for red wine may lie in the success of the red Doppio Passo.

**Large Groups on the Move**

**Chris Swanepoel**, Marketing Director at Mack & Schühle, believes that the weakness of red wine is important for the overall market price structure. "Red wines were previously an important component in the premium category," he said. "White wines and rosé wines are currently more in demand than red wines in the price category



The interior rooms of Herder Zehn restaurant (Credits to Herder Zehn)





The cellar at Emma Metzler restaurant (left), its menu (center) and its counter (right)

above €5 in percentage terms, but red wines still account for the larger volume."

According to Nielsen, red wine accounted for 48% of sales in the over 5€ segment in the first half of 2024 with 27.7 million bottles, while white wine only reached 40.6% with 23.3 million bottles and rosé a total of 11.1% with 6.4 million bottles.

In this higher price range - which is already considered premium in the food retail sector in some cases - the majority ratios are basically reversed. Therefore, a further decline in red wine sales would also impair the already declining premiumization movement in the vineyard.

Red wine is also one of the trouble children at the international sparkling wine group Henkell Freixenet.

"Red wine is currently under more pressure than white wine and rosé," said **Andreas Brokemper**, CEO of the company - also internationally. The company's successful "I heart" wine line, which is available as I heart Pinot Grigio, I heart Sauvignon Blanc, I heart Prosecco and also as red I heart Merlot, is designed to meet consumers' taste preferences.

"I heart reached an all-time high last year with this philosophy," said Mr. Brokemper. The line takes the complexity out of the wine selection with its simple naming. This obviously goes down well, even for the red wines.

**Restaurants are also Reacting**

The weakness in red wine is also noticeable in the restaurant trade.

"Of course, red wines always go better in winter than in summer," said **Patrick Strähle**, sommelier at the Emma Metzler restaurant in Frankfurt am Main, which has received awards for its wine list from the Gault & Millau restaurant guide and is known for having Orange Wine, Natural Wine and Pet-Nat on the menu.

According to Strähle, heavy and complex candidates such as Barolo, Bordeaux and some Pinots in particular have a hard time in the warm season. In order to offer guests a special wine experience, Mr. Strähle had added the category "light red wines" to the wine list. These are light wines that are served chilled, i.e. at temperatures of 8 to 10 degrees. Currently, these are a Blauer Portugieser from Rheinhessen, which is also available by the glass. In the light wine category, Emma Metzler

also offers a Pinot Noir from Rheinhessen, a Grolleau from the Loire and a Poulsard from the Jura. "We've also once had Beaujolais on offer," Mr. Strähle said.

However, French wines are becoming more and more expensive. That's why he doesn't currently provide Beaujolais. The willingness of his guests to opt for a chilled red wine in summer is now high.

"The category has established itself," he explained. "There is much more understanding of this type of wine today than in the past."

For the autumn, he has now added a Dolcetto to the portfolio, which is sure to delight guests with its juicy style - and will remove the light red category, but not the wines.

"Our customers understand what they are drinking even without this category," he added. Mr. Strähle also observes that the demand for wines is currently becoming more conservative again. Expressive styles, such as the Orange category, are no longer as popular. "Our



guests increasingly want to drink classic, high-quality, sustainably produced wines," Mr. Strähle said.

Many have drunk their way through and developed their tastes. A rosé-colored Pinot Gris with a long maceration period, as was popular a few years ago, is no longer of interest today. And many winegrowers who used to be known for their wild styles are now making different wines.

**German Consumers between Alcohol, Tannins and Sweets**

But why are red wines currently having such a hard time on the market?

"Many consumers are looking for lighter wines," said **Janek Schumann** MW, who himself is a specialist wine merchant in his vinotheque Herder 10 in Freiberg, Saxony.

On the one hand, red wines are often more alcoholic - which would put off potential buyers when they look at the label. On the other hand, there are sensory characteristics, such as the tannin but also the high extract in many reds, that give them a dense, mouth-filling consistency. This is too much for a growing number of buyers. "We are currently selling red wines with a lighter consistency," Mr. Schumann said.

These include Beaujolais, but also wines from Sicily, for example from the Cos winery in the cool, windy region of Vittoria, whose wines usually have around 12.5 percent alcohol by volume. There are also Portuguese reds, such as red Vinho Verde and wines from the Baga grape variety. Montepulciano d'Abruzzo is also currently enjoying great popularity due to its accessibility and animating fruit components. Schumann does not even have the Italian perennial favorite Primitivo in his portfolio.

But **Melih Günsel**, the head of specialist retail at the Höchst winery, does.

"The trend towards Primitivo shows no sign of abating," he said.

Consumers are not even bothered by the high alcohol levels.

"Customers find Primitivo light because the wine has no annoying rough edges, such as excessive tannins," he added.

Both Mr. Günsel and Mr. Schumann are also currently seeing a growing popularity of Valpolicella. "It's the top seller for us at the moment," said Mr. Schumann, who is also a Master of Wine.

"We have 70 percent German wines in our range - and our customers are also looking for them," said Mr. Günsel from the Höchst winery.

The demand for German wines has increased noticeably and consumers have gained confidence in their own wine country, including red wine. It goes without saying that he also has some German Pinot Noirs in his range as a result. Pinot Noir is a grape variety that has its own tendency towards lightness - depending on how it was grown and when it was harvested.

"Pinot Noirs from Germany are still in good demand," Mr. Günsel said.

South Tyrolean reds made from the Lagrein grape variety and the Italian Trollinger variant Schiava are also doing well at the moment. It is interesting to note that customers are buying Schiava, but leaving Württemberger Trollinger behind. Nevertheless, he is very cautious when it comes to new listings of red wines, says Günsel. He only orders really great wines, or what is currently on the market. He has 10 wines listed from the well-known VDP vintner Philipp Kuhn, who is a new addition to the portfolio and has a reputation for his red wines, but only three of them are reds. The same applies to other wineries.

"We tend to stock up on white wines, i.e. Riesling, Pinot Blanc and Pinot Gris," Mr. Günsel said. Rosé is not doing exceptionally well for him either.

Janek Schumann in Freiberg in Saxony is different. He also does well with Chardonnay and Burgundy, but also with rosé. It's a success story during summer.

"It's an ongoing theme - rosé is even consumed in Germany in winter, even if not as much as in summer," he said.

He also sees strong demand for Sauvignon Blanc and other aromatic varietal wines, for example from Greece.

"Riesling, on the other hand, is dead here," he said, noting a trend that can indeed be observed in German regions outside the major growing areas.

If there is demand for Riesling, then it is with residual sweetness, i.e. feinherb or in the Kabinett or Spätlese quality levels.

"Customers are once again confidently admitting that they like a slight sweetness in their wine," Mr. Schumann said.

He is also experiencing this at the Wackerbarth winery in Saxony, for which he works as an enological consultant.

"Residual sweetness is having a renaissance," he said. "At Wackerbarth, the charmingly balanced wines are always the first to sell out."

It seems that the future of German wine will not only be white and rosé - but also a little sweeter again.



Melih Günsel



Andreas Brokemper



Chris Swanepoel



Janek Schumann



Patrick Strähle



NO LONGER JUST FRENCH, BUT ITALIAN AND OTHERS ARE KNOCKING ON THE DOOR

# How CHINA'S WINE Is Changing. New Grape Varieties Advance



By IAN D'AGATA

*Over the years, several possibilities have opened up besides Cabernet Sauvignon, initially only focused on other French varietals— also because of the sole presence of French experts—, but later also looking at Italy and Spain, without forgetting the hybrids developed right in China*



**L**ike practically everywhere else in “new” modern-day wine producing countries such as Australia, Chile and the USA, Chinese wine has been dominated by the usual suspects: Cabernet Sauvignon (and Chardonnay amongst white grapes, but to a much lesser extent than Cabernet Sauvignon). However, as the Chinese are becoming increasingly more knowledgeable about wine, things are beginning to change. It is still a stretch to say that the country is no longer speaking *français* when it comes to its wine grapes, but Chinese wines are starting to speak different grape nationalities. Today, many outstanding Chinese wines are being made with non-French varieties such as Aglianico, Barbera, Ritzkateli, Saperavi, and Tempranillo. But less-famous French grapes are getting their day in the sun too, like Petit Manseng and Marselan, the two grapes with which China’s arguably best wines are being made today. Add to that already long and thought-provoking list that wine grapes previously associated with cheap quaffs such as

Welschriesling are now showing real promise, and that Chinese grape crossings (developed in Chinese university laboratories) like Beihong and Beichun are now the source of some very good wines, and you understand how the name game has changed in Chinese wine.

#### Chinese Vineyards in Numbers and History

At 756,000 hectares, China boasts one of the largest vineyard extensions in the world: the third-largest, in fact (though it is not entirely clear how much of that number refers to table grapes too). Clearly, among wine grapes, Cabernet Sauvignon (60,000 hectares, or roughly 70% of the total wine grape plantings in the country) is abundant in China just like it is everywhere else. The reasons for this are many and varied. First and foremost, just like it was with other New World wine producing countries, new wineries in China went about planting the best-known grapes with which to make their wines. Grapes chosen are invariably those associated with French wines, generally regarded as the world’s best and that, on average, fetch the highest prices. There aren’t too many people starting a winery by making large volumes of wine with Trebbiano

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Yanzhi Zhang



Clara Wang



Richard Li



Xige Estate

◆ Toscano, Dornfelder and Harslevelu, as good – or not – those wine grapes may be. Second, the vast majority of consultant winemakers all over the world are of French nationality: when called upon, their course of action is to understandably work with the grape varieties they know best. Clearly, there's not too many French consultant winemakers who are telling their clients in Chile, California or South Africa to plant Pampanuto, Tibouren or Torrontès Sanjuanino. By and large, it's always the same five or six wine grapes that get planted everywhere. Last but not least, winery owners and their staff mostly train in French wine university programs. Even when that is not the case, most people attend wine schools located in countries where the majority of the wines are made with the better-known French grapes. Clearly, varieties such as Cabernet Sauvignon, Merlot, and Syrah have many positive traits, and are associated with some of the world's greatest wines. When the rebirth of China's modern wine industry took place at the beginning of the 2000s, it was therefore only logical that new outfits would plant the world's best-known grapes. However, because China's modern wine industry was born under a set of unique circumstances, China is characterized by an ever-increasing number of outstanding wines made from very different grape varieties not grown much anywhere else. This has been facilitated in recent times by the creation of a registration system of non-major crop varieties that has provided an acceleration of the selection and promotion of new varieties, besides providing needed safeguards and regulating the market. In an interesting 2021 study ("Analysis on current situation of grape cultivar registration and development of seed industry in China"), statistical results showed that since the implementation of China's variety registration system, a total of ninety-seven grapes were registered, including hybrids and table grapes.

### Three Key Moments for Chinese Wine

There are three fundamental moments explaining today's Chinese wine reality. The first important building block was set in 1892, when the Changyu wine company in Shandong imported over one hundred different grape varieties to China. Very differently from most other New World countries making wine nowadays, China's wine learning curve did not begin by having the same, and very few, grape varieties planted everywhere from the beginning. This is precisely why Cabernet Gernischt, one of the varieties brought over by Changyu, has thrived in China, and nowhere else: often believed to have been originally either Cabernet Franc or Carmenère, Gernischt has adapted to Chinese soils and climates over the last century and is now giving wines that are altogether different from those of the other two grapes. The mutations built up within Gernischt's DNA are such that the variety must now be considered at the very least a Chinese biotype of Cabernet Franc or of Carmenère, if not a distinct Chinese grape altogether.



**Yanzhi Zhang**, owner of Xige Estate in Ningxia, is one of the two largest producers of Cabernet Gernischt wines in China, with which he makes an excellent single vineyard wine called Jade Dove (about 100,000 bottles a year) and then, only in the best years, a super-selection bottling (only 10,000 bottles/year) called "X". Both wines have won numerous Chinese and international wine awards over the years.

"People here like Gernischt's wines," said Yanzhi Zhang. "Delicately spicy and medium-bodied with good acidity, it gives a red wine that matches well with many Chinese dishes. We also own some of China's oldest Gernischt vines: now 25-26 years of age, we believe that for this variety the future is bright."

Today, there are exceptionally good wines being made with Cabernet Gernischt from many wineries like Silk Road, Chateau Nine Peaks and Changyu. The current hectareage of Cabernet Gernischt present in China currently is unknown, because most statistics also include plantings of Cabernet Franc and Carmenère, but an estimate of about 6-8,000 hectares of the true Gernischt variety in China would not be too far off the mark. Xige on its own has 300 hectares of Gernischt.

The second important moment resulted from China's need to develop new table and wine grapes capable of surviving in the more extreme habitats the country is characterized by. In parts of northern China, winter temperatures can drop down to minus forty degrees Celsius such that *Vitis vinifera* varieties cannot survive (short of burying the vines); and in parts of southern China, the climate can get so hot and so humid that such varieties cannot cope there either. Hence the need to develop Chinese crossings and hybrids suited to the country's weather extremes. Throughout the twentieth century, China's universities and agricultural laboratories developed many new grapevines; the Bei line of grapes (Beihong, Beimei and Beichun), developed in the 1950s, are all capable of giving good to very good wines.

**Clara Wang**, owner of Puchang vineyard, sings the praises of Beichun: "We grow Cabernet Sauvignon and like our wine made with it, but it's Beichun we make most bottles of wine with. It gives a fruity, medium to full-bodied wine that most people like. Clearly, it's still a bit of a learning curve for us, as nobody has much experience with this variety yet, but the fact that it is the only variety we don't need to bury in winter, a huge plus for us given Xinjiang's extreme weather."

Like Xige's Gernischt wines, Puchang's Beichun wines have also won numerous international awards and high scores over the years. Beichun isn't the only hybrid enjoying its moment in the sun: today, China makes excellent wines with other hybrids such as Vidal and with local Chinese varieties like Longyan and the *Vitis Amurensis* grape that no other country in the world offers wines of. But the Turpan Valley of the Xinjiang province where Puchang is located is also suited to rare Eastern European *Vitis Vinifera* varieties too; for example, Georgia's Rkatsiteli and Saperavi. Wines made from these grapes are hard to come by outside of their original home (the Konstantin Frank winery in New York State's Finger Lakes region has had success with these varieties, but that's the exception rather than the rule). Rkatsiteli has been an especially interesting success story for Puchang, so much that the winery now makes not just a very good mineral, lemony, classically dry white wine with it, but made an orange Rkatsiteli wine for the first time this year.

The third important moment in the development of China's ability to use less well-known grape varieties to make world-class wines is in relation to the founding of the Domaine Franco-Chinois (DFC) in 1999. Sino-French cooperation led to sixteen different French wine grapes (and twenty-one clones) being planted in

vineyards of Hualai Hebei, a wine producing zone of China near Beijing. Over the years, the two varieties that have most stood out are Marselan and Petit Manseng, with Dfc winning accolades and awards everywhere with their wines. And differently from Beichun and Saperavi wines that remain somewhat anecdotal in terms of Chinese production volumes, both Petit Manseng and Marselan have known rocket-like success, with over sixty wineries in China now making mono-variety wines with one or the other. Wineries such as Chateau Anuo, Longting Vineyard, and Chateau Nine Peaks are just some of the wineries making world-class Petit Manseng wines in China (both dry and late harvest sweet versions), while the list of wineries making monovariety Marselan wines is even longer (Fei Tswei and Silver Heights are just two of the many world-class wines made in China with this Grenache x Cabernet Sauvignon crossing first developed in France in 1961). To be clear, Marselan is one of China's most popular grape varieties nowadays, and plantings are increasing all the time. Worldwide, Marselan grows in France (3662 ha, mostly in Languedoc and Rhône); Uruguay (120 ha); and Serbia (84 ha), with 10-20 hectares in each of Chile, Brazil, Romania and Argentina. China today has the second largest expanse of Marselan vines in the world, estimated at close to 1000 hectares. Chinese plantings of Petit Manseng remain smaller than those of Marselan, but the song remains the same, in that Chinese Petit Manseng wines are more often than not of world-class caliber. The wines are so successful wineries are now making both dry and sweet versions: (for example, Longting Vineyard only made a late harvest Petit Manseng at first, but added a classically dry wine two years ago encouraged by Petit Manseng wine sales). China now owns the second largest vineyard extension of Petit Manseng vineyards in the world: Petit Manseng grows mostly in southwestern France (1,247 ha); there's a little in the Usa (32 ha), Argentina (12 ha), Italy (4 ha), Spain's Basque country (3 ha) and Chile (0.4 ha). But all on its own, China's Yantai subregion of the Shandong peninsula boasts around one hundred hectares, and there's more planted all over China.

**Richard Li**, Ceo of the winery, believes both grapes have come to characterize a part of China's wine production, and has begun exporting the wines of these two grapes outside of China.

"Petit Manseng does very well in high-end on-trade channels; at Michelin-starred restaurants there is a genuine interest in having our wines on wine lists," he said. "This is also because, save for a few of our country's spiciest dishes, Petit Manseng wines pair extremely well with most types of Chinese cuisines, which isn't really true of most of the world's best-known white wines".

### Other Varietals

Other grape varieties are being currently studied at many other wineries throughout China. Barbera, which was originally planted in super-hot and dry Ningxia province mostly as a blending agent to supply acidity, has shown to make such good wines on its own that some estates have started to bottle it on its own. At Silver Heights winery, their cement-venified and aged Barbera wine went on sale for the first time this year (in Europe too) and has met with huge success. So much success that after the first two hectares planted in 2018, the estate has now planted another hectare. Aglianico, Sangiovese and Nebbiolo, even Grechetto di Toddi, are examples of other Italian grapes that have been planted and are already giving very good wines; the wines of Tempranillo, a Spanish variety, are already turning heads; and the same is true of Malbec (a French variety made famous by Argentina) and Petit Verdot, of which there are now more mono-variety bottlings in China than there are in that grape's native France. In ultimate analysis, it's hard not to think that the large diversity of grape varieties adapting well to China's many habitats and the quality of their wines means exciting times ahead for wine lovers everywhere.



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# COMING SOON

Next month, the International Exhibition of Winemaking and Bottling Machinery, organised by the UIV, will open its doors and bring professionals from five continents to Milan. A showcase of technological innovation for the wine and beverage world, the event celebrates its 60<sup>th</sup> anniversary with a growing number of exhibitors and participants in the Innovation Challenge competition. Alongside the exhibition, a full programme of events and conferences will provide the opportunity to discuss the most pressing issues facing the industry

By ROSSELLA CONTATO

**T**here's great anticipation in the wine and beverage sector for the 30th edition of SIMEI, the International Exhibition of Machines for Winemaking and Bottling, which will be held at Fiera Milano from 12 to 15 November. Organised by the Unione Italiana Vini (UIV), the biennial event celebrates its 60th anniversary and confirms its leading role as a showcase for technological excellence in the wine sector and other beverage industries, including mineral water, beer, oil, spirits and fruit juices, with the aim of facilitating more efficient links between exhibitors and visitors. This year's figures exceed those of the previous edition: 31,500 square metres of exhibition space (almost +12% compared to 2022) and 557 exhibitors (+13% compared to 2022), with almost a quarter coming from abroad.

The success of the now traditional "Lucio Mastroberardino" Innovation Challenge is also confirmed, with a record number of participants. This year, 38 companies have registered, an increase of almost 40% compared to the last edition. The winners will be announced during the opening ceremony of the event, which marks the start of the 2024 edition of the exhibition. The three award categories are "Technology Innovation Award," "New Technology" and the "Green Innovation Award," introduced in 2022 to highlight projects focused on climate change mitigation, circular economy and water consumption, in line with EU sustainability regulations.

#### Technological Innovation as a Decisive Factor

"SIMEI is the most important global event for wine companies and the supply chain for wineries and vineyards, and there is great anticipation in the sector for this 30<sup>th</sup> edition," said **Paolo Castelletti**, Secretary General of the UIV. "The exhibition continues to be an important meeting point for technological innovation and a reference point for addressing the main challenges facing the sector, such as climate change and changing consumer trends. There's also the need to contain rising production costs, for which technology, research and innovation can provide effective solutions."

"In this context, the record number of entries to the Innovation Challenge is a welcome surprise," he added. "It shows that technology suppliers understand the importance of innovation for businesses, which is essential to maintaining competitiveness. Investing in innovation as a marketing strategy represents a qualitative leap in the relationship with wine companies, putting the development of the sector at the forefront. Innovation must become a common goal for wine producers and the technology supply chain".

#### Increasingly International

Over the years, SIMEI has become increasingly international, thanks to an intense incoming campaign that will once again bring professionals from all five continents to Milan. The Italian Trade Agency (Ice) that promotes Italian companies abroad, plays a prominent role, among the public and private partners collaborating with the exhibition.

"The priority is to select and involve operators who are genuinely interested in creating business matches to establish new commercial relationships," said **Matteo Zoppas**, President of Ice. "With the involvement of our foreign offices, we are working in growing markets interested in Made in Italy technologies. For this edition of SIMEI, we expect 150 operators, including buyers and purchasing managers, from about 20 countries around the world, exceeding the approximately 370 meetings organised by Italian exhibitors during the 2022 edition."

Another important partnership between Ucima (Italian Association of Packaging Machinery Manufacturers) and Anformape (National Association of Suppliers of Machinery, Accessories and Products for Winemaking) will be presented on the first day of the exhibition.

"It's a collaboration born from Anformape's desire to find something new and interesting to offer members of the machinery sector, through highly detailed information on the sector of plant engineering," said **Marzio Dal Cin**, President of Anformape. "This general agreement will allow us to obtain from Ucima a rich series of information and solutions about various issues such as certifications and foreign markets for example. Our members from the wine equipment sector will have access to a Confindustria database dedicated to the sector, giving them a tangible advantage. The agreement also promotes contacts between Ucima and companies in the wine machinery sector which could be encouraged to join."



**Paolo Castelletti** (left), secretary general of the UIV, **Matteo Zoppas** (center), president of Ice, and **Marzio Dal Cin** (right), president of Anformape





### A RICH CONFERENCE PROGRAMME

*SIMEI is a reference point for industry operators in terms of professional development, thanks to the extensive programme of conferences, seminars, forums and meetings that will once again offer the opportunity to deepen knowledge of current and interesting topics for the wine world and beyond.*

Sustainability will be one of the highlights of the conference organised by the UIV, "Sustainability in Wine: When innovation becomes a development strategy." The discussion will focus on ways of innovating organisational processes within companies through projects that improve business performance (with measurable quantitative indicators) according to one or more of the three pillars of sustainability. The conference organised by Federegno, "The Sustainability of Cork Stoppers and the New Guidelines for Cork Stopper Control" will instead focus on closures. The four days of events will also cover many other topics related to process techniques and technologies, materials and ingredients. Assoenologi (Italian Association of Oenologists and Oenotechnicians) will hold a conference entitled "Grape Crystals: Rectified concentrated must solids in oenological applications." More than ten years have passed since the EU legislator approved the use of this product, known as MCRS, in winemaking. This event will review the technological and regulatory path that led to its industrialisation, describe its chemical-physical characteristics and present the results of applied studies in different winemaking practices.

Among the events not to be missed are the conferences organised by the three Italian Masters of Wine, **Gabriele Gorelli**, **Andrea Lonardi** and **Pietro Russo**, who will be appearing together for the first time at SIMEI. Mr. Gorelli, the first Italian to achieve this prestigious title, will chair a conference on technology and innovation in winemaking, presenting cutting-edge case studies and reflecting on the possibility of placing these issues at the heart of wineries' communication strategies.

"The idea is to use technical elements that enhance certain sensory aspects of wine, which can also be used as storytelling elements to sublimate the message of new technologies," Mr. Gorelli explained. "These include the toasting of barrels with volcanic stones or the possibility of using ceramic bottoms in barrels or hybrid steel/ceramic tanks. But there are many other innovations that can help us both make wine and communicate it better."

Andrea Lonardi will be coordinating a meeting on climate change and the stylistic evolution of wines, which will analyse the latest equipment and technical know-how available on the market for each stage of production (pressing, fermentation, ageing, preparation of the product for bottling and packaging) and for the main styles of wine (white, red, rosé, sparkling). For white wines in particular, the delicate moment of pressing will be discussed, given the importance today of ensuring the most gentle and respectful operation possible, protecting the musts from oxidation caused by increasingly ripe grapes.

For red, white and rosé wines, the topics of vinification and aging will be explored, reflecting on how the use of steel is changing and how other materials, such as concrete, are becoming complementary tools. With regard to sparkling wines, closures and new materials will be discussed, opening up a new horizon of develop-

ment and greater guarantees of freshness in the bottle. The topic of dealcoholisation will also be addressed, which is becoming increasingly important not only because of growing market trends, but also because of higher quality demands at product level.

Finally, Pietro Russo will lead a very specific conference on the techniques of tartaric stabilisation in wine, one of the most important and delicate phases in the preparation of wines for commercialisation. This topic will be examined not only from a technical point of view, but also by analysing in detail its economic and regulatory aspects.

"The subject has become particularly sensitive due to the new wine labelling regulations, which require the listing of ingredients and will inevitably influence the technical choices made by producers," Mr. Russo noted.

"Today, oenologists are called upon to evaluate not only the effectiveness, qualitative impact and cost of each oenological treatment, but also the potential impact of ingredients on labels for consumers, even when deciding how to stabilise their wines to prevent sediment formation in the bottle," he said.

In this complex scenario, the conference aims to look at some of the most common technical ways of achieving tartaric stability, such as chilling, electro dialysis and the use of potassium polyaspartate, and evaluate their effectiveness, impact on wine quality, economic and regulatory aspects and, last but not least, environmental sustainability.

#### Spirits, Beer, and Oil

As already mentioned, the conference programme will not only cover the world of wine, but also the other beverage sectors represented at SIMEI: spirits, beer and oil.

As part of the Distillo Expo - an exhibition held for the first time at SIMEI, curated by Davide Terziotti and Claudio Riva (Craft Distilling) and dedicated to equipment for micro-distilleries - a series of meetings will focus on the world of artisanal distillation, an ever-growing sector. One round table will look at the question of identifying an "Italian way" of making whisky from the producers' point of view, focusing on distinctive elements such as the use of wine barrels or typical ingredients such as ancient grains. A second round table will look at whether we can talk about an Italian gin and whether the conditions are in place to obtain a geographical indication to strengthen the brand, given that some of the world's best juniper comes from specific Italian regions. In addition to other sessions dedicated to Italian products (including grappa and vermouth), the Distillo programme also includes a conference on the national and international spirits market, technical seminars largely organised by companies exhibiting at SIMEI, and sessions with international guests.

Another new addition to the SIMEI conference programme is BeerForum 2024 - The General States of Beer, with masterclasses, conferences, seminars, talks and tasting workshops. The event is organised by Luca Grandi, founder of the Italian craft beer promotion project Birra Nostra and curator of Italy's first and only beer tourism guide. Many topics will be discussed: beer classification and authentication, assessing the impact of climate change on quality, the interaction between the growing environment and hop quality, waste recovery and other sustainability aspects, hop processing technologies, yeast selection and the impact of barley on beer quality. Finally, the workshops will allow enthusiasts to better understand IGA beers (Italian Grape Ale, made with grape must) and fruit beers, low-fermentation beers (which are currently experiencing a resurgence) and low-alcohol beers.

Oil is also a major theme at SIMEI and will be the centrepiece of a large space called L'Oleoteca di Olio Officina, curated by Luigi Caricato (director of the Olio Officina publishing house, the Olio Officina Festival and the Olio & Ristorazione Forum). Inside, visitors will find both an exhibition on packaging design and a series of sessions on topics such as the correct preservation of oil along the distribution chain, the risk of contamination by chemical compounds (MOSH and MOAH), the need to update product classification, the functional and aesthetic role of containers and the evaluation of sensory quality.



**FOCUS ON THE VINEYARD WITH ENOVITIS BUSINESS**

In addition to the extensive and varied offerings of the wine sector, there will be a select area featuring key players in the agricultural supply chain. Complementing the wine supply chain, there will be displays of machinery for soil and canopy management, vineyard protection, a wide range of equipment and products for vineyard establishment and leading nurseries operating in the global market.



#### FOLLOW SIMEI ON SOCIAL MEDIA

SIMEI is also on Facebook, Instagram and LinkedIn: follow the pages to keep up to date with all the latest news.

**SIMEI 2024** »

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6

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## THE WORLD MEETS AT SIMEI »

More than 400 operators from all over the world are expected to attend the 2024 edition of SIMEI. Thanks to the collaboration of the Italian Trade Agency (Ice), 150 buyers from 20 countries are expected to participate in the selection activities of the exhibition. A further 250 international operators have also been invited by the event's management team. These include oenologists, agronomists, technical directors, company owners and purchasing managers, as well as importers and technology distributors from all over the world. Most have already confirmed their attendance, making SIMEI the most important networking event of the year in the wine and beverage technology sector.



### INTENSE PROMOTIONAL ACTIVITY EXPECTED AT SIMEI 2024 A CLOSER LOOK AT THE ITALIAN TRADE AGENCY PARTNERSHIP

# Meeting Place for Buyers and Purchasing Managers from All Continents

Interview with Matteo Zoppas, President of Ice. "The priority is to select and involve operators who are motivated to create business matching moments to generate new business opportunities," he said. "We work by involving our foreign offices in the fastest-growing markets that are interested in Italian technology."



**T**he increase in registrations confirms the optimistic forecasts made in recent months for the most eagerly awaited international exhibition of wine and beverage technologies. The 30<sup>th</sup> edition of SIMEI, organised by Unione Italiana Vini, will be held from 12 to 15 November at Fiera Milano Center. With over 30,500 square metres of exhibition space (almost +12% compared to 2022) and over 500 exhibitors (+13% compared to 2022), 22% of which are from abroad, this year's figures exceed all previous editions.

In an extremely fluid global market, these figures confirm that SIMEI has become the most important exhibition for presenting and promoting Made in Italy technologies to professionals from all over the world. It is also a great opportunity to discover the latest innovations and services in the field of bottling and packaging technologies for wine, beer, spirits, juices, water and oil.

**Intensive Selection initiatives**  
As in previous editions, SIMEI 2024 will follow this direction, highlighting activities and meeting opportunities aimed at attracting qualified beverage operators from all the main producing countries. Organised by Unione Italiana Vini, the event has become the most important international exhibition dedicated to oenological

and beverage technologies. Since the first edition of SIMEI in 1963, the organisers have always made great efforts to attract foreign visitors to ensure the success of the exhibition. Over the past 60 years, SIMEI has been at the forefront of the growth of knowledge and image in the sector, promoting technologies, especially Italian ones, throughout the world. All this thanks to the collaboration of public and private structures that have helped to connect SIMEI with the rest of the world.

#### Partnership with the Italian Trade Agency (Ice)

The Italian Trade Agency (Ice) is one of SIMEI's main partners in its outreach strategy. The aim of this government agency is to promote the economic and commercial development of Italian companies in foreign markets, promoting the excellence of Made in Italy. We met with the President of Ice, Matteo Zoppas, to find out more about this collaboration.

#### Ice provides SimeI with crucial support for the arrival of operators and wine producers from all over the world.

**How did Ice manage these invitations?**  
After the success of previous editions of SIMEI, Ice continues to work to attract qualified foreign operators interested in the technologies and know-how of the Italian companies participating in the exhibition. The success of an exhibition is based on its ability to generate contacts and business agreements between exhibiting companies and buyers and purchasing managers. For this reason, the work carried out in previous months is extremely important in order to select and involve those operators who are genuinely interested and to create business matching moments that pave the way for new commercial relationships. Together with Unione Italiana Vini, Ice is also involved in the selection of qualified operators to be invited to SIMEI 2024.

#### What kind of response have you received

#### from the invited buyers?

#### What countries do they come from?

150 operators, including buyers and purchasing managers, from about 20 countries on all continents: America, Europe, Africa, Asia and Oceania, are expected to attend SIMEI 2024. They have been selected by Ice's international offices in the fastest-growing markets and in traditional wine production and bottling markets interested in Made in Italy technologies. The aim is to exceed the 370 meetings with Italian exhibitors organised during SIMEI 2022.

#### Now that wine is produced all over the world, Italian wine technology can be found on five continents.

#### How are Italian technologies and Italian companies perceived in foreign markets?

One fact above all: Italy is the world's second largest exporter of machinery and equipment for all stages of wine production and bottling, surpassed only by Germany. Italian technology is valued worldwide and ranges from machinery such as presses and crushers to equipment for bottle preparation, filling, sealing and labelling. What distinguishes Italian machinery is the high technological content, the quality of the product and the after-sales service that companies offer their customers. This applies not only to products for the wine sector, but also to the beverage sector in general.

The sector is worth more than €3 billion, with 70% of its turnover generated abroad. In 2023 alone, exports will amount to €2.48 billion, an increase of +18% compared to 2022. The success of production and bottling machinery and technology is closely linked to the growth of the wine sector, which experienced difficult times in 2023 in key markets such as the United States and Germany.

However, in the first months of 2024, wine export figures show a growth of 3.9% between January and March compared to the same period in 2023, reaching €1.8 billion. It is still too early to make predictions, but we continue to see strong interest in Made in Italy wine around the world.



Ministry of Foreign Affairs and International Cooperation



madeinitaly.gov.it



CEEV DATA PRESENTED AT THE G7 AGRICULTURE MEETING IN ITALY

# Europe and the Rest of the World. Stable Volumes for 2024 Harvest

By FABIO CIARLA

While harvest data for the southern hemisphere is more or less final, the overall assessment of the 2024 vintage is still uncertain as harvesting continues in the northern hemisphere. According to data focusing on the results of the five leading European producing countries, published by Ceev during the G7 meeting dedicated to agriculture on 24 September in Syracuse (Italy), Italy regained first place in the world with a



forecast of 41 million hectolitres (+7% compared to 2023). Falling to 39.3 million hl, France (-18%) risks losing its second place to Spain, which saw its production score a +20% for a final forecast that could reach 39.7 million hl.

Perhaps the most interesting data on Spain during the presentation by Gaya Ducceschi, Ceev's Head of Communication, was the country's +0.7% increase in wine consumption. A sign of recovery that will hopefully spread to the rest of the continent.

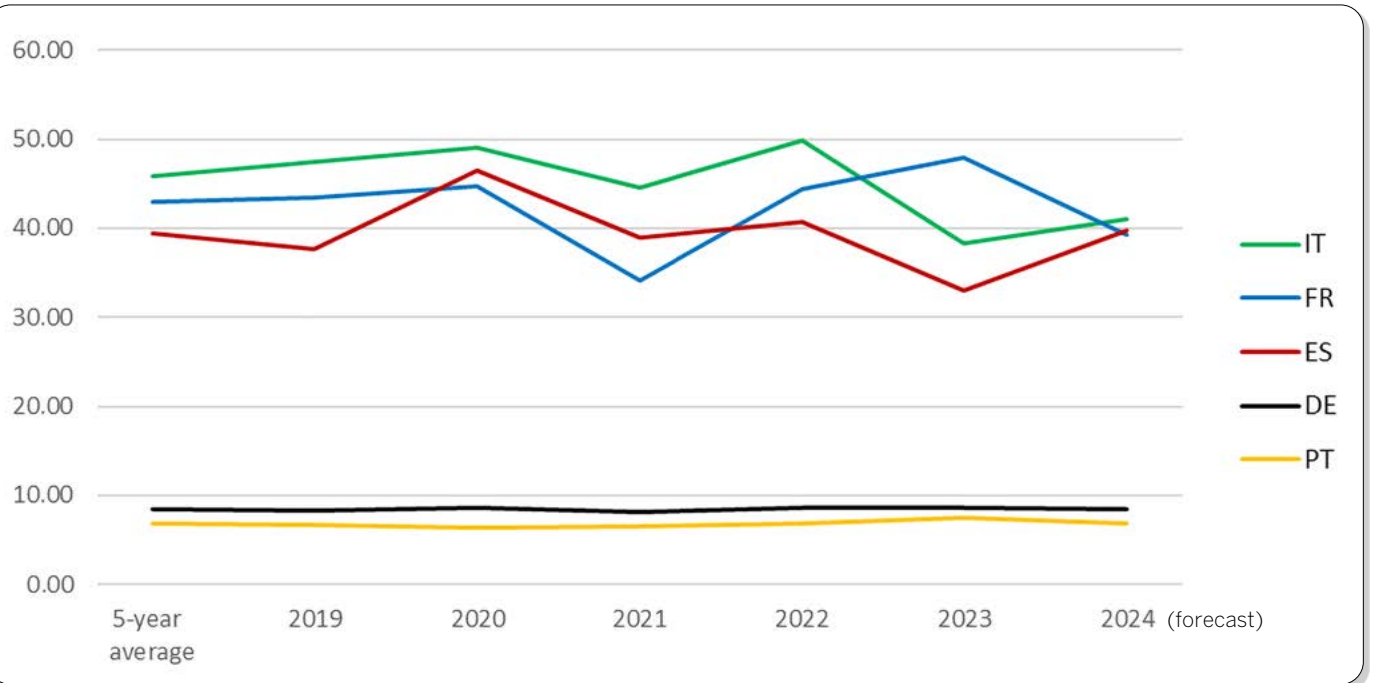
There was little movement in Germany, with 8.4 million hl and -2% on the previous year, and slightly more in Portugal, with -8% for a total of 6.9 million hl.

A balance that goes beyond considerations of the final destination of musts, etc., but which is useful in considering production potential in the context of the debate on reducing subsidised uprooting of European vineyards.

With fragmented data collection at the time of publication, it is still difficult to make a single forecast for the 2024 crop in the US, the world's fourth largest producer. Many industry experts are predicting a highly qualitative vintage, particularly in California. A welcome outcome that will hopefully improve the economic sustainability of the sector, which faces many agronomic challenges, from plant disease to water shortages.

While the Northern Hemisphere as a whole does not appear to be affected by seasonal variability, the situation below the equator is quite different. Because of their latitude and orographic conditions, the countries of the southern hemisphere are very different from one another.

*This year will be remembered as a difficult year for European wine production in terms of volume. Some areas of the southern hemisphere had much better harvests, bringing the global total close to the average of recent years*

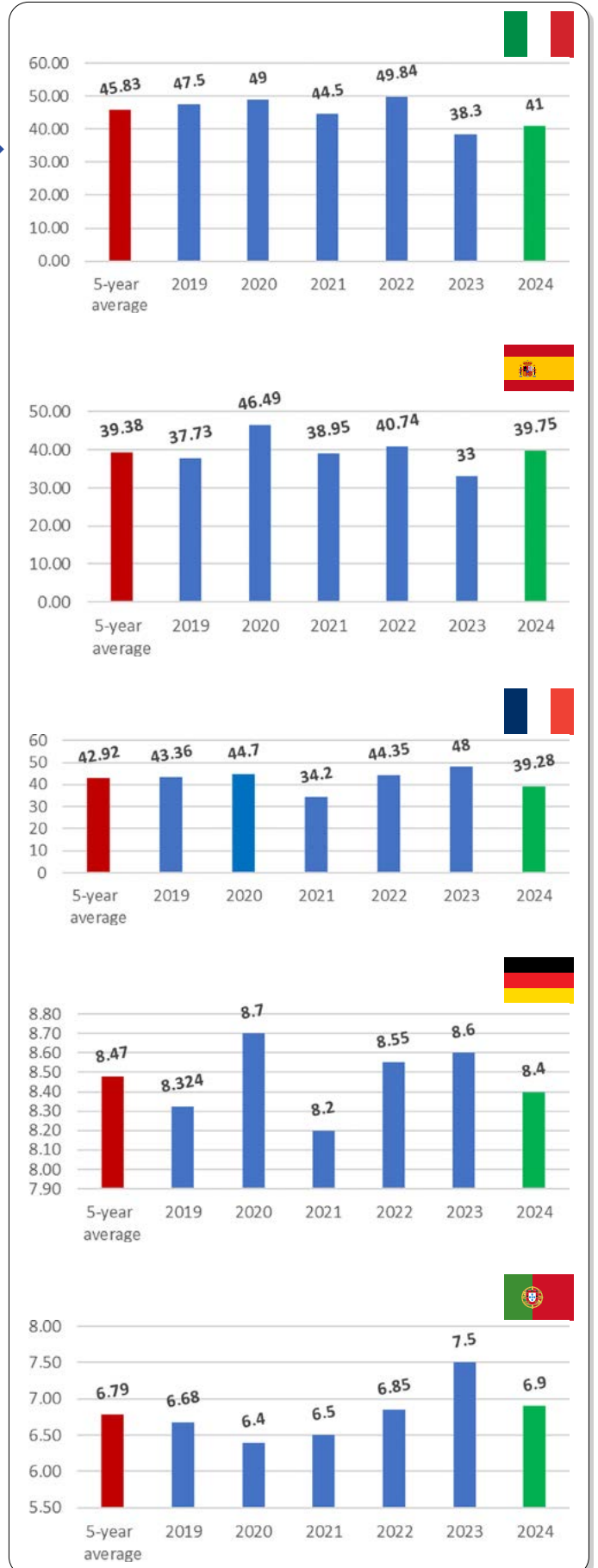


**Wine and Must Production in the Main European Countries**  
Compared with the Average of the Past 5 Years

**Wine and Must Production By Country**

Argentina and Australia are the absolute leaders in terms of percentage growth this year. The former produced around 11.2 million hectolitres, up 27% on last year. Australia was slightly lower at +21%, with a total of 11.7 million hl. South Africa produced 9.4 million hectolitres, a slight increase of +1%. The figures for New Zealand (-21% to 2.8 million hl) and Chile (-10% to 9.9 million hl) were negative, although in the latter case the quality of the vintage was excellent. From a global quantitative perspective, there is no significant movement, as values have tended to be very similar for years.

As the Ceev presentation showed, the continuing decline in wine consumption around the world remains a cause for concern, despite the growth in no-alcohol and low-alcohol products.



**The Top 10 Wine Producers in the World**  
2024 (forecast) vs. 2023

Italy	41 Mhl +7%
Spain	39.7 Mhl +20%
France	39.3 Mhl -18%
USA	24.3 Mhl*
Australia	11.7 Mhl +21%
Argentina	11.2 Mhl +27%
Chile	9.9 Mhl -10%
South Africa	9.4 Mhl +1%
Germany	8.4 Mhl -2%
Portugal	6.9 Mhl -8%

\*OIV data from the 2023 harvest





CEEV SECRETARY GENERAL REFLECTS ON THE DATA

# GOOD BUT LOW. The EU Harvest Tested by the Market

By GIULIO SOMMA

As Europe grapples once again with a complicated vintage due to difficult weather conditions, the continent's wine industry is facing stagnation on the world markets, while at the same time being caught up in an equally complex political conflict resulting from the new institutional framework following the European elections in June. The management of production potential was at the centre of a divisive debate at the first meeting of the top-level group focused on wine on 11 September. The next meeting, scheduled for mid-October, could prove decisive, both at national level and at the level of the sector's organisations, between those calling for economic intervention to support uprooting campaigns and those, led by the Ceev, calling for stronger development and promotion measures on the markets. We asked **Ignacio Sánchez Recarte**, Secretary General of the Ceev, for his opinion on the debate, given that the assessment of the 2024 harvest in Europe (presented in Italy by the Comité Vins at the press conference on harvest forecasts on 24 September at Expo Divinazione in Syracuse, organised on the occasion of the G7 Agriculture)

will obviously have a direct impact on market scenarios. Issues such as grape and bulk prices or bottle price policies will be addressed by the European institutions in the context of the new CAP and CMO for wine. If Ceev's forecasts are confirmed, Cantina Europa will end the year with a 2024 vintage of good quality, but with volumes below the average of recent years: good news for the sector as a whole, given the burden of stocks and the uncertain market outlook. This does not solve the sector's structural problems, said Mr. Recarte, nor does it hide the fact that the news "will certainly be welcomed by some, but will be an economic tragedy for others." This is all the more true given the increase in very localised and adverse weather phenomena linked to climate change, which are becoming increasingly unpredictable. Frost and hailstorms can, in some areas, ruin entire vintages or facilitate the spread of phytopathologies, leading to a significant increase in management costs for winegrowers or serious production losses. An uncertain climate "that we will have to learn to live with", replied Mr. Recarte, so that the sector can face up to the complications that the market is currently experiencing.



Ignacio Sánchez Recarte

**In general terms, what is the qualitative and quantitative balance of the 2024 harvest in the main European countries?**

From a qualitative point of view, despite difficult climatic conditions and an increase in plant diseases in some areas, the quality remains good. Winegrowers are doing an excellent job. Interventions in the vineyards have increased in some areas of the Old Continent, helping to maintain quality.

Looking at the latest yield estimates for the major European producing countries, France's harvest should fall by 18% to just under 40 million hectolitres. Italy should once again become the world's leading producer. For Spain, the harvest should be 20% higher than in 2023 (again approaching 40 million hl), but production will still be below average. Portugal and Germany are also expected to have harvests below the average of the last five years, at just under 7 million hl and 8.5 million hl respectively. The European harvest as a whole will be below the average of recent years due to very erratic weather conditions. Climate change continues to have a major impact on production trends. Plant diseases and erratic weather conditions can affect neighbouring areas very differently, sometimes decisively. Future vintages run the risk of becoming an unpredictable lottery, with hail and frost hitting the vines at random. Doesn't this uncertainty frighten you? We already experience this uncertainty every year and I am afraid we will have to learn to live with it, forcing us to continue to work and invest in climate change mitigation strategies. This uncertainty is a nightmare for the develop-

*The 2024 European harvest is expected to be of good quality, but below average in terms of volume. Good news for some, given stocks and market trends, said Ignacio Sánchez Recarte, but a tragedy for others. Embroiled in a major dispute with the EU institutions over the new CAP - where the harvest data could also come into play - the European wine industry faces a difficult autumn as it struggles with climatic uncertainties and changes in consumption.*

ment of business plans based on production potential.

**What can be done at a political and scientific level to help the wine industry deal with these critical and recurring issues?**

The wine sector clearly needs to invest more in research and development. Ceev set up a dedicated R&D group last year to help the industry access EU funding more easily. We need more funding for research and innovation and we need to be better prepared as a sector to use it effectively to provide answers and solutions to businesses. In parallel, EU support under the CAP should focus more on business support measures aimed at both adapting viticulture to new weather conditions and mitigating the effects of climate on crops; we cannot continue to turn a blind eye to the serious impact of climate change on our sector. According to the forecasts, France is back in second place behind Italy (perhaps even third), just ahead of Spain. This indicates a significant drop in total production. Will producers calm down on the issue of surpluses? Will they reduce the pressure to uproot? A smaller harvest would be positive for stocks and would certainly be welcomed by

some, but it would also be an economic tragedy for others. The pressure is there, it is less talked about because the focus is now on the vineyards, but the problem will not disappear just because France will have a below average production compared to last year.

**Recent vintages are no longer hyper-productive in Europe, but the problem of surpluses remains due to market difficulties. How should this problem be addressed and managed at national and European level?**

We urgently need to recognise the main problem of surpluses and avoid focusing on a few symptoms. In other words, we are not necessarily producing too much, the problem is that wine is selling less in a world where alcohol consumption is expected to increase and where low- or no-alcohol drinks are gaining in popularity. We strongly believe that we should focus on market measures that can help us increase (or at least maintain) the market share of wine. In parallel, we need the support of the EU authorities to improve our regulatory framework and to make our production system as efficient as possible by reducing production and marketing costs.







GRASSROOTS INITIATIVE IN FAVOUR OF RESPONSIBLE CONSUMPTION

# The VITAEVINO INTERNATIONAL CAMPAIGN in Defence of Wine

*In addition to the Comité Européen des Entreprises Vins, the grassroots campaign is also supported by Cevi (Confédération Européenne des Vignerons Indépendants), COPA-COGECA and Efow (European Federation of Origin Wines). Collection of signatures launched with institutional events in European capitals*

By FABIO CIARLA

**T**he European wine world is entering a new, proactive phase to defend the social, cultural and economic role of wine. Following the growing campaigns against alcohol consumption in general, with very serious repercussions on the wine sector in particular, the continental producers' organisations have responded by launching a project to support and defend wine and all that it represents. That's why the European wine community is launching the VITAEVINO campaign, a grassroots initiative to defend the rich culture of wine and its role in promoting conviviality. The campaign will be launched across the European Union with national and regional events hosted by ministries and local authorities in the Czech Republic, Germany, Italy (Ministry of Agriculture), Spain (Parliament) and Slovakia, as well as through a press release in Austria, France and Portugal. The VITAEVINO campaign is a key initiative calling for the recognition of moderate wine consumption as part of a healthy and balanced lifestyle. The declaration aims to promote the legitimate and sustainable place of wine in our society and calls for a distinction to be made between alcohol abuse and moderate wine consumption. It aims to implement a balanced approach to wine consumption and to recognise the important socio-economic role that wine plays in our economy, rural environment and culture.

At the European level, the launch is supported by MEPs **Carmen Crespo Díaz** and **Eric Sargiacomo**. "We are delighted to support the VITAEVINO campaign," said Ms. Crespo. "A grassroots initiative that amplifies the voice of wine lovers across Europe. We encourage everyone to join us by signing the declaration at [www.vitaevino.org](http://www.vitaevino.org)." This grassroots initiative is inviting people, whether wine lovers or professionals, to get involved in supporting and defending wine, in opposition to: "the growing global movement that tends to demonise spirits and wine," said **Gaya Ducceschi** of Ceev during the G7 agriculture meeting in Syracuse, Sicily, bringing the focal point on the distinction between consumption, use and abuse, in an open discussion centered on wine. "For this reason, we have launched 'VITAEVINO Defend Wine Culture and Conviviality', a grassroots campaign to build a movement of people calling for the defence of wine and its place at the table," she explained. "A declaration in which people pledge to defend wine, its cultural and socio-economic role, its positive impact on rural areas, but also the right to enjoy a glass of wine with complete peace of mind... we are all invited to sign."



Gaya Ducceschi



The president of the Unione Italiana Vini, **Lamberto Frescobaldi**, signing the Vitaevino statement together with Italy's Agriculture Minister, **Francesco Lollobrigida**



## THE DECLARATION

**Wine is Tradition and Culture**  
Wine, a cultural cornerstone, has transitioned from sustenance to a cherished social ritual over centuries. Vineyards and wine regions symbolise the rich interplay between humanity and nature across generations. Recognised by UNESCO as integral to our intangible cultural heritage, wine fosters sustainability and community.

**Wine is Moderation and Conviviality.**  
Wine enjoyed in moderation complements a modern, balanced and healthy lifestyle. Wine embodies culture, pleasure, taste, community, and fosters conviviality which is embedded in the act of sharing. Embracing wine in moderation is part of the art of living in numerous cultures.

**Wine is Community and Sustainability.**  
The socioeconomic significance of vineyards and wine production in rural areas is undeniable. The wine sector is instrumental in the preservation of these areas by fostering both environmental stewardship and vibrant community engagement.

**By signing this Declaration, I hereby:**

- Support the preservation of wine culture and the heritage of wine.
- Request support for the vital role of wine in rural regions and their economy.
- Pledge for the legitimate place of moderate wine consumption within a healthy and balanced lifestyle.
- I claim my right to enjoy wine in moderation.

Join the Movement & Sign the Declaration on [www.vitaevino.org](http://www.vitaevino.org)

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WORLD IMPORTS  
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# SIGNS OF RECOVERY

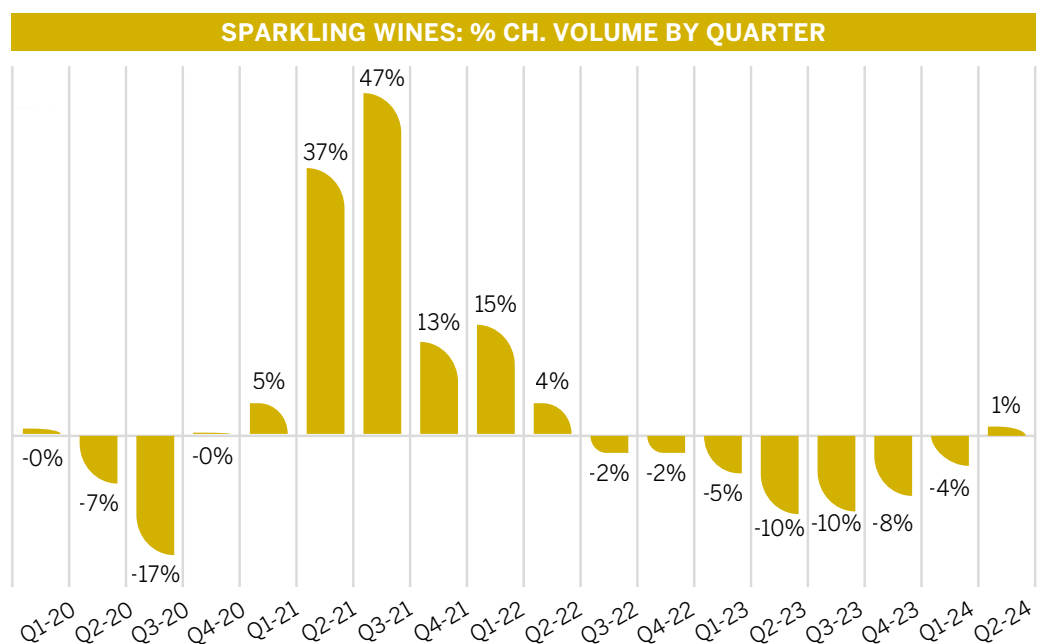
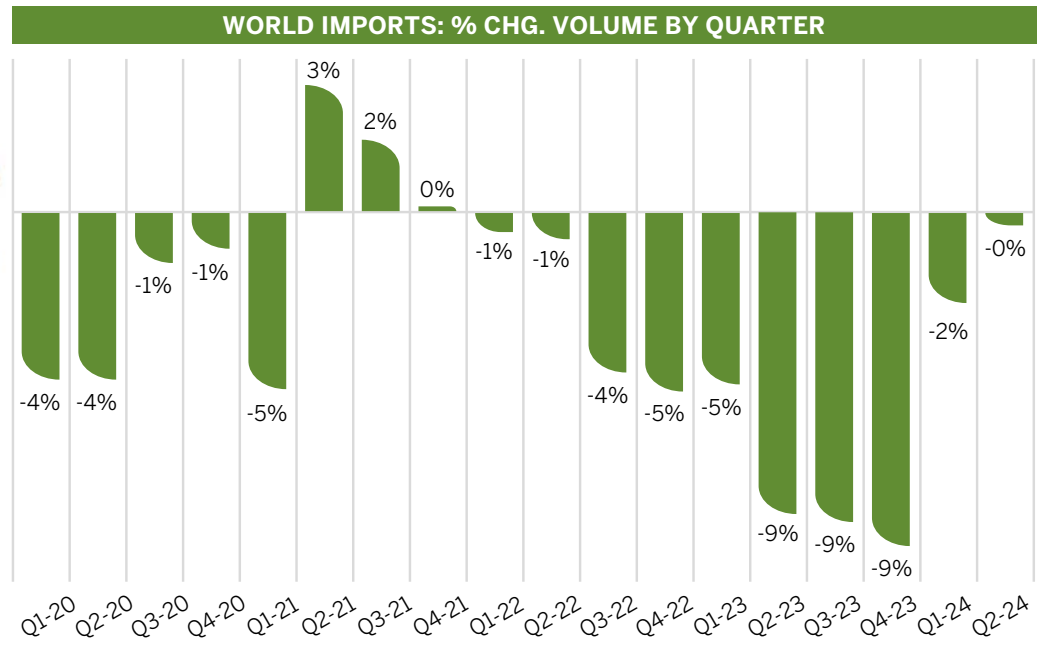
## Yet with Values Slowing Down

The main countries monitored in the April-June quarter have broken out of a negative series that has lasted since 2022. In China, the Australians are making a strong comeback

By CARLO FLAMINI - UIV Wine Observatory

After a first quarter that showed tentative signs of recovery, the second quarter of the year (finally) brings the volume back to zero percent compared to the equivalent of 2023, breaking an uninterrupted negative streak that had lasted since the second quarter of 2022. Alongside sparkling wines (+1.3% quarter on quarter, weighed down by the poor performance in France), packaged still wines also contribut-

ed with a convincing +2.7% increase in volume, offsetting the -3.3% performance of bulk wines. Taking the quarters together, the January-June figure is 27 million hectolitres (-1%), with still and sparkling wines still struggling to break even and bulk wines down by -1.3%. In terms of value, sparkling wines are at the bottom of the league (-11%), while bulk wines are up +4% (driven by average prices that are still rising (+5%)). Packaged still wines are in the middle with -3.5%, with prices falling by 3%.



### WORLD TRADE: FIRST SEMESTER (Jan to June)

	,000 Litres			,000 US\$			US\$/litre		
	2023	2024	% Chg.	2023	2024	% Chg.	2023	2024	% Chg.
USA	81,957	85,644	4.5	805,947	725,958	-9.9	9.83	8.48	-13.8
UK	65,746	66,417	1.0	539,756	522,522	-3.2	8.21	7.87	-4.2
Japan	17,898	17,011	-5.0	346,867	269,889	-22.2	19.38	15.87	-18.1
Germany	30,238	25,849	-14.5	237,668	200,199	-15.8	7.86	7.74	-1.5
Switzerland	9,948	9,503	-4.5	119,750	98,682	-17.6	12.04	10.38	-13.7
France	18,669	19,623	5.1	81,059	86,071	6.2	4.34	4.39	1.0
Canada	8,972	8,337	-7.1	94,050	85,902	-8.7	10.48	10.30	-1.7
South Korea	3,730	2,651	-28.9	50,601	42,137	-16.7	13.57	15.89	17.2
China	2,941	3,115	5.9	31,798	32,365	1.8	10.81	10.39	-3.9
Hong Kong	1,424	1,125	-21.0	41,012	31,235	-23.8	28.80	27.76	-3.6
Brazil	2,650	2,609	-1.5	15,722	17,944	14.1	5.93	6.88	15.9
Total	244,173	241,884	-0.9	2,364,231	2,112,904	-10.6	9.68	8.74	-9.8

	,000 Litres			,000 US\$			US\$/litre		
	2023	2024	% Chg.	2023	2024	% Chg.	2023	2024	% Chg.
USA	338,817	348,578	2.9	2,429,266	2,393,238	-1.5	7.17	6.87	-4.2
UK	284,222	285,369	0.4	1,495,652	1,395,759	-6.7	5.26	4.89	-7.1
Canada	116,737	116,186	-0.5	790,400	820,207	3.8	6.77	7.06	4.3
Germany	235,788	228,592	-3.1	850,482	773,981	-9.0	3.61	3.39	-6.1
China	75,877	76,075	0.3	509,329	637,049	25.1	6.71	8.37	24.8
Switzerland	47,203	43,728	-7.4	519,790	471,272	-9.3	11.01	10.78	-2.1
Japan	71,591	70,301	-1.8	473,892	433,082	-8.6	6.62	6.16	-6.9
Hong Kong	15,150	14,716	-2.9	493,542	417,537	-15.4	32.58	28.37	-12.9
France	50,977	46,682	-8.4	265,932	223,630	-15.9	5.22	4.79	-8.2
Brazil	64,005	67,448	5.4	198,004	209,667	5.9	3.09	3.11	0.5
South Korea	23,214	18,954	-18.4	211,817	172,608	-18.5	9.12	9.11	-0.2
Total	1,323,581	1,316,629	-0.5	8,238,106	7,948,030	-3.5	6.22	6.04	-3.0

	,000 Litres			,000 US\$			US\$/litre		
	2023	2024	% Chg.	2023	2024	% Chg.	2023	2024	% Chg.
UK	220,376	226,816	2.9	285,820	321,133	12.4	1.30	1.42	9.2
Germany	362,771	370,961	2.3	257,850	264,376	2.5	0.71	0.71	0.3
USA	205,830	195,574	-5.0	158,074	166,706	5.5	0.77	0.85	11.0
France	221,150	207,177	-6.3	128,183	132,070	3.0	0.58	0.64	10.0
China	47,338	49,326	4.2	44,044	36,874	-16.3	0.93	0.75	-19.7
Switzerland	23,299	23,688	1.7	36,563	35,429	-3.1	1.57	1.50	-4.7
Canada	56,255	48,065	-14.6	37,061	32,104	-13.4	0.66	0.67	1.4
Japan	15,403	16,467	6.9	17,437	17,781	2.0	1.13	1.08	-4.6
Total	1,152,422	1,138,074	-1.2	965,032	1,006,473	4.3	0.84	0.88	5.6

BOTTLED W. SPARKLING W. BULK W.

	,000 Litres	,000 US\$	% Chg.	,000 Litres	,000 US\$	% Chg.	US\$/litre	% Chg.
Aggregated total	2,720,176	2,696,587	-0.9	11,567,369	11,067,406	-4.3	4.25	4.10

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

### SPARKLING WINES

In the second quarter, sparkling wines improved to +1% from the negative figures that had persisted since the third quarter of 2022, although it lost heavily on the price and therefore value side (more than -10% compared to June 2023). Japan, Germany (-15%), Switzerland and Canada are the category's slowest performers, while the United States (+4.5%) and the United Kingdom (a modest +1%) remain positive.

In Germany, the decline is entirely French (-20%) and Spanish (-28%), while Italy is holding up well (-2%, with two quarters below 6 million litres).

The British figure confirms the French difficulties (-9%), while Italy, thanks to the triangulation of Prosecco with Belgium and, more recently, Germany, is up 3% (direct shipments are -11%).

Italian growth in the American market is maintained (+8% in volume, with prices kept cold), while French value plummets, with -22% in sales and a 20% drop in prices.

### STILL WINES

Packaged still wines saw important quarterly rebounds in two main markets: the USA (+7% in volume terms in April-June, with Italy +5%, Spain +15% and Chile +60%) and Japan (+10%), with half-year figures of +3% and -2% respectively (Tokyo was -14% in March).

China is bouncing back with imports from Australia returning to second place in terms of value, helping to bring the half-year balance back to zero after three years in the red.

On the other hand, the market continued to suffocate in the United Kingdom with Italy worsening its balance by 3 points in March (to -10%), overtaken by France, which confirmed the good performance of the previous quarter (+8%).

Germany also remained negative in terms of volume (-3%, also with a significant compression in prices), while Italy improved its very bad March figure (from -12% to -1%). Spain was the best performer, with a jump of +23% in June, after closing March at +13%. Canada was also negative, with the US and Italy at -6% and France stable, for an overall market of -1%, thanks to the particularly positive performances of Spain and Chile.

### BULK

In bulk, Germany continues to support Spain (+19%) due to a shortage of Italian products (-14%). In the United Kingdom, Australia faces a drop in imports, while New Zealand, the USA and Chile are seeing a surge in products. France also recorded a stagnant market, around -6%, with average prices up by 10%.

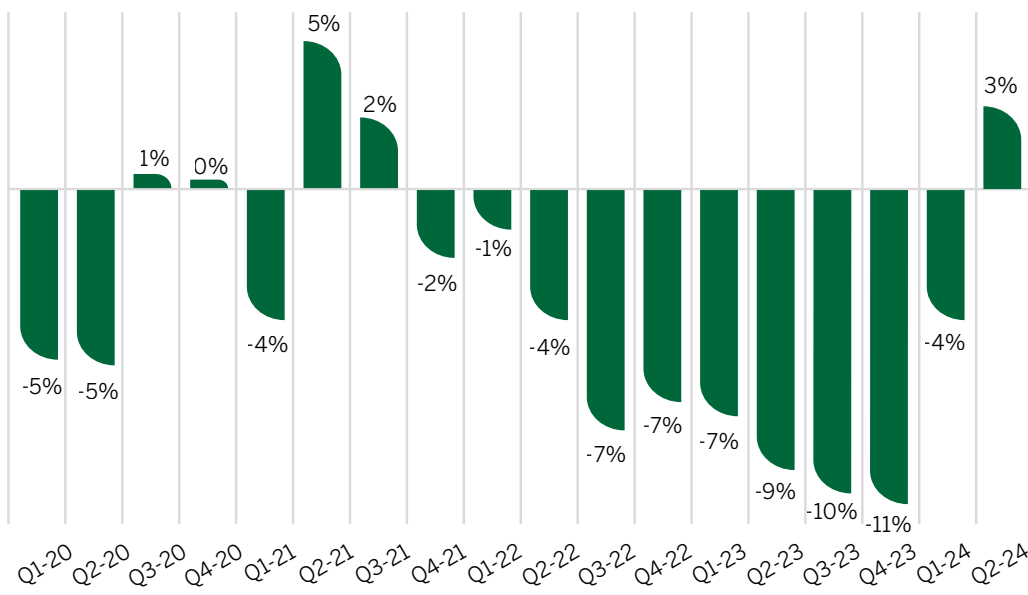
Data on countries mentioned in the story are available on [www.wine-observatory.com](http://www.wine-observatory.com)



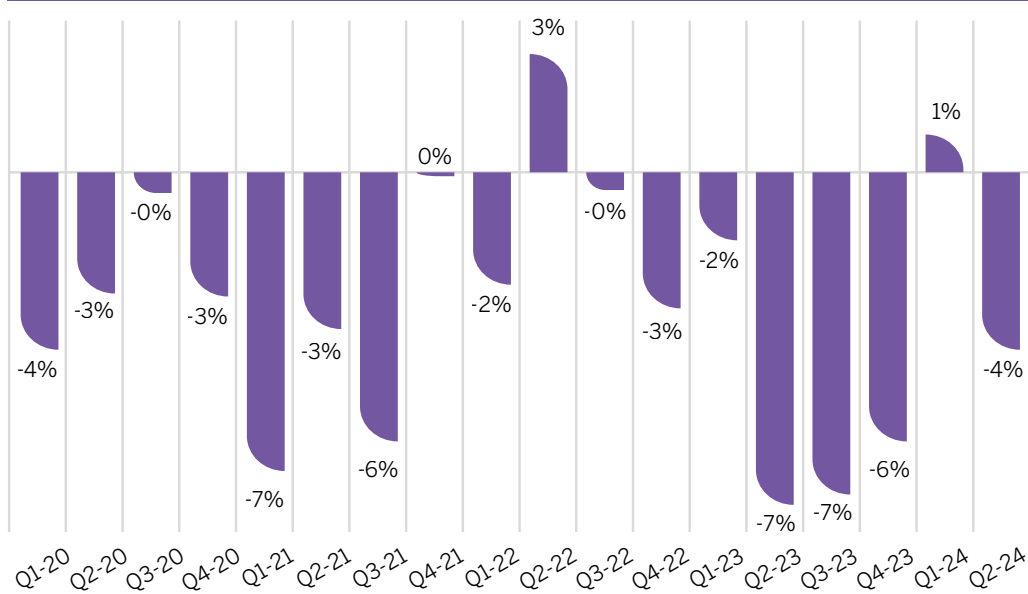
WINE OBSERVATORY



**BOTTLED STILL WINES: % CHG. VOLUME BY QUARTER**



**BULK WINES: % CH. VOLUME BY QUARTER**



**GERMANY**

BOTTLED W.	,000 litres		,000 Euro		Euro/litre	
	2024	% Chg.	2024	% Chg.	2024	% Chg.
Italy	99,133	-6.2	321,522	-9.5	3.24	-3.5
France	41,528	-5.4	165,056	-9.9	3.97	-4.8
Spain	47,256	18.0	94,189	1.2	1.99	-14.3
Austria	11,331	-8.5	32,080	-9.1	2.83	-0.7
Portugal	7,535	-6.0	23,053	-2.3	3.06	3.9
USA	3,437	-21.3	20,569	-20.2	5.99	1.3
South Africa	3,499	-20.7	13,269	-16.4	3.79	5.5
Australia	1,969	-43.5	8,344	-38.8	4.24	8.2
Chile	1,572	-30.8	7,096	-28.6	4.52	3.1
Greece	2,481	-7.8	5,953	-6.2	2.40	1.8
New Zealand	659	10.0	4,285	5.1	6.50	-4.4
Others	8,192	2.1	20,653	-0.6	2.52	-2.7
<b>Total</b>	<b>228,592</b>	<b>-3.1</b>	<b>716,069</b>	<b>-9.0</b>	<b>3.13</b>	<b>-6.1</b>

**BOTTLED WINES**



**UNITED KINGDOM**

BOTTLED W.	,000 litres		,000 Pounds		Pounds/litre	
	2024	% Chg.	2024	% Chg.	2024	% Chg.
France	59,101	8.8	390,823	-8.9	6.61	-16.2
Italy	54,672	-8.9	164,418	-7.5	3.01	1.6
Spain	34,311	-14.3	110,722	-14.1	3.23	0.2
Belgium	35,144	9.1	95,736	1.8	2.72	-6.7
New Zealand	10,583	-33.9	51,318	-36.5	4.85	-4.0
Chile	20,069	30.5	48,845	15.6	2.43	-11.4
Australia	11,844	-7.1	39,340	-12.4	3.32	-5.6
Germany	14,286	89.2	35,969	46.3	2.52	-22.7
South Africa	11,095	-0.7	31,169	-3.6	2.81	-2.9
Netherlands	11,471	17.0	28,208	-0.8	2.46	-15.2
Argentina	8,255	-7.3	27,896	-11.3	3.38	-4.3
Portugal	8,478	-8.3	27,217	-19.7	3.21	-12.4
USA	2,179	-15.4	24,114	-19.0	11.07	-4.3
Others	3,879	-8.6	27,655	-16.2	7.13	-8.2
<b>Total</b>	<b>285,369</b>	<b>0.4</b>	<b>1,103,432</b>	<b>-8.9</b>	<b>3.87</b>	<b>-9.2</b>



**USA**

BOTTLED W.	,000 litres		,000 \$		\$/litre	
	2024	% Chg.	2024	% Chg.	2024	% Chg.
Italy	110,555	2.4	780,929	4.9	7.06	2.5
France	68,181	1.7	766,003	-3.8	11.23	-5.4
New Zealand	31,494	-19.9	224,502	-22.4	7.13	-3.1
Spain	21,138	-0.7	141,938	-0.8	6.71	-0.1
Argentina	20,459	1.4	104,289	1.4	5.10	-0.1
Australia	31,499	-1.1	100,515	-1.2	3.19	-0.2
Chile	25,407	39.4	74,535	18.6	2.93	-14.9
Portugal	11,049	1.1	56,071	-1.8	5.07	-2.8
Germany	6,975	-10.8	34,986	-6.2	5.02	5.1
South Africa	3,169	-16.2	17,785	-11.9	5.61	5.1
Others	18,653	78.6	91,685	23.8	4.92	-30.7
<b>Total</b>	<b>348,578</b>	<b>2.9</b>	<b>2,393,238</b>	<b>-1.5</b>	<b>6.87</b>	<b>-4.2</b>



**CHINA**

BOTTLED W.	Litres		\$		\$/litre	
	2024	% Chg.	2024	% Chg.	2024	% Chg.
France	22,727,072	-15.6	229,018,424	-6.9	10.08	10.4
Australia	7,260,519	6836.9	163,497,750	35205.2	22.52	408.9
Chile	20,310,572	3.8	82,207,739	-8.1	4.05	-11.4
Italy	6,304,629	-9.4	45,556,934	-9.3	7.23	0.1
USA	2,349,964	19.6	35,543,076	32.3	15.12	10.6
Spain	6,085,716	-18.6	23,959,068	-17.0	3.94	2.0
New Zealand	1,361,929	0.5	12,915,434	0.8	9.48	0.3
Germany	1,941,711	-6.0	12,228,642	1.9	6.30	8.3
South Africa	1,969,592	-36.2	7,292,680	-32.5	3.70	5.7
Argentina	1,127,426	1.7	5,836,250	-24.8	5.18	-26.0
Portugal	980,240	-10.2	4,353,018	-6.3	4.44	4.3
Georgia	1,145,510	-28.5	3,998,562	-29.2	3.49	-0.9
Moldova	1,283,930	49.4	2,820,735	17.3	2.20	-21.5
Others	1,225,870	-27.6	7,819,759	-31.4	6.38	-5.2
<b>Total</b>	<b>76,074,680</b>	<b>0.3</b>	<b>637,048,071</b>	<b>25.1</b>	<b>8.37</b>	<b>24.8</b>

**SPARKLING WINES**



**UNITED KINGDOM**

SPARKLING W.	,000 litres		,000 Pounds		Pounds/litre	
	2024	% Chg.	2024	% Chg.	2024	% Chg.
France	9,025	-9.2	188,109	-11.7	20.84	-2.7
Italy	35,292	-10.5	135,650	-11.9	3.84	-1.6
Belgium	11,855	43.3	46,529	26.5	3.93	-11.7
Spain	6,180	-9.1	21,518	2.7	3.48	13.0
Germany	2,712	7277.1	9,620	1499.5	3.55	-78.3
South Africa	475	40.9	2,897	37.0	6.10	-2.8
Australia	276	17.4	1,383	35.4	5.02	15.3
USA	54	-41.8	337	-63.3	6.29	-36.9
New Zealand	44	-60.3	277	-59.5	6.27	2.0
Others	504	3.7	6,738	0.9	13.36	-2.7
<b>Total</b>	<b>66,417</b>	<b>1.0</b>	<b>413,060</b>	<b>-5.4</b>	<b>6.22</b>	<b>-6.4</b>



**USA**

SPARKLING W.	,000 litres		,000 \$		\$/litre	
	2024	% Chg.	2024	% Chg.	2024	% Chg.
France	16,228	-1.5	353,741	-22.2	21.80	-21.0
Italy	58,160	8.0	317,339	6.6	5.46	-1.3
Spain	9,550	-2.1	44,904	6.4	4.70	8.7
Germany	310	23.8	1,616	23.6	5.22	-0.1
Australia	124	-18.6	832	-4.9	6.69	16.8
Others	1,272	-13.8	7,526	-16.2	5.92	-2.8
<b>Total</b>	<b>85,644</b>	<b>4.5</b>	<b>725,958</b>	<b>-9.9</b>	<b>8.48</b>	<b>-13.8</b>

**BULK WINES**



**GERMANY**

SPARKLING W.	,000 litres		,000 euro		Euro/litre	
	2024	% Chg.	2024	% Chg.	2024	% Chg.
France	7,894	-20.3	112,005	-22.1	14.19	-2.3
Italy	11,748	-1.7	53,448	-0.9	4.55	0.8
Spain	5,772	-27.7	17,332	-13.3	3.00	19.9
Austria	33	-72.6	628	-18.2	18.86	198.4
South Africa	32	1.6	276	0.7	8.60	-0.8
Ukraine	7	27.8	33	32.0	4.78	3.3
Others	363	45.5	1,430	28.9	3.94	-11.4
<b>Total</b>	<b>25,849</b>	<b>-14.5</b>	<b>185,152</b>	<b>-15.8</b>	<b>7.16</b>	<b>-1.5</b>



**GERMANY**

BULK	,000 litres		,000 Euro		Euro/litre	
	2024	% Chg.	2024	% Chg.	2024	% Chg.
Spain	172,906	18.9	83,663	37.4	0.48	15.6
Italy	95,461	-14.3	67,415	1.3	0.71	18.2
France	23,078	-3.5	21,700	-16.2	0.94	-13.2
New Zealand	4,666	-29.0	13,203	-42.9	2.83	-19.5
South Africa	17,276	-2.7	11,160	-2.9	0.65	-0.2
Australia	13,051	-18.0	10,524	-25.1	0.81	-8.7
USA	7,880	6.6	10,240	7.0	1.30	0.3
Hungary	11,755	29.5	7,210	30.0	0.61	0.4
Others	24,889	-1.9	19,445	-9.4	0.78	-7.7
<b>Total</b>	<b>370,961</b>	<b>2.3</b>	<b>244,560</b>	<b>2.5</b>	<b>0.66</b>	<b>0.3</b>





**CMP**

**Your Wine Cellar And Our Vinplast:  
The Perfect Combination For Ageing Your Wine**

Are you looking for a functional system to keep your bottles safe? The correctly storage system is essential. Our Vinplast are designed to allow to store bottles in a horizontal position to guarantee the long-term integrity. Thanks to our focus on sustainability, our 100% recycled plastic interlayers are the ideal storage for all types of bottles. There are 12 different types for each model of bottle for still wines and sparkling, too. Benefits: you protect the bottles from rubbing because each bottle

is placed in a separate unit; your bottles are protected from light and dust; you can create the heights you want up to a maximum of 20 sheets in a pallet, this system allows making the most of the available space. Consider that you can use the space up to the ceiling; you always know without losing time how many bottles you have stored; each sheet is from 0,85 to 1 Kg = easy to handle.; pallets are stable and secure. If a bottle breaks, there is no risk of the stack of bottles on top falling over because

each bottle is a unit in itself; if a bottle splits, wine does not drip onto other bottles; easy and fast to assemble; can be stacked 1.000 empty sheets on top of each other; cheap price. The satisfaction of our customers makes us proud and builds customer loyalty over time. Please watch our videos on YouTube and discover what our customers say about Vinplast. The results allow us to suggest you: "Use our Vinplast system to take best care of your beloved bottles and... enjoy your wine!"

**ENOMECCANICA BOSIO**

**Pythagora® Ceramic Membrane  
Crossflow Filter Born Eco-Friendly**

As long ago as Simei 2013, Enomeccanica Bosio Srl managed to confirm its innovative nature once again by winning the "Lucio Mastroberardino" Innovation Challenge for its FTC 31-F crossflow Filter for lees and wine. Though little more than a prototype at the time, its revolutionary tilted housing containing the ceramic filtration modules was already making an impression. The innovative idea lay in catering for optimal feeding of the membranes from bottom to top, while at the same time removing any CO2 from the fining lees. It was immediately clear that the FTC 31-F filter offered considerable versatility, combined with enormous technological potential. Huge

strides have been made since then in terms of automation and hydrodynamics. The new filters are all Industry 4.0 compliant, and in addition to the patented "Back Pulse" are equipped with an additional automatic "Active - Flow" device (patent pending) that improves the performance of the new filter and expands its applications. The degree of automation achieved allows the Pythagora filter to work 24/7, ensuring operational efficiency and safety by guaranteeing connection aimed at remote control and support. On top of all that, Enomeccanica Bosio never forgets its mission and that of its references, namely an obsessive focus on end product quality.



**ENOVENETA**

**Full Automatic Grape Pressing Plants**

Enoveneta is a leading international company with over 60 years of experience in the production and trade of cutting-edge winemaking machinery. The company can count on its highly specialized team dedicated to researching and developing new advanced technologies and it is proud to set its sights on Fap (Full Automatic Process), an innovative system that automates the entire working process from product loading to machine washing. This system is managed by state-of-the-art software, that allows the entire working cycle to be programmed. The "Dynamic" program optimizes the management of drained must using tank sensors, thus ensuring homogeneous must removal and, in addition to this, it ameliorates the pressing cycle using specific calculation algorithms. Combined

with weighting cells placed on the four feet and a liter counter on must output, the Fap system streamlines and coordinates various work phases. By implementing the Fap system, wineries can experience significant benefits, including a 20-25% reduction in overall costs compared to a conventional system. Saving personnel who normally carry out the various operations, loading, unloading, and washing. Saving overall process time by eliminating all the downtime that normally occurs. Process control by an operator at any time. Increased productivity due to the optimisation of cycles which, through specific calculation algorithms, automatically manage the progress of the pressing program, guaranteeing a desired extraction rate.  
Info: [www.enoveneta.it](http://www.enoveneta.it)

**ERO**

**Binger Pre-Pruner Now Features  
The Vitiassist System**

The German company Ero GmbH offers a new, camera-based opening system for the Binger VSL 07 P pre-pruner. The system goes by the name VITIassist and provides significant relief for the driver. Work quality improves and the vineyard terrain is protected from damage. The driver can focus solely on steering

the tractor while ensuring consistent work efficiency throughout the work day. The Binger VSL 07 P pre-pruner is especially suitable for cord-trained vineyards. It trims the vineyard to the desired height. The exposed shearing disks are not susceptible to blockage. Therefore, pruning can already be done be-

fore leaf fall. Thanks to numerous options, Binger offers the right model for every application. In addition to the Binger pre-pruner, Ero GmbH also offers the Viteco cane pruner for Guyot training. With Viteco, time savings of up to 50% are possible.  
Info: Luca Peretto, phone: +39 348 3108971, [luca.peretto@ero.eu](mailto:luca.peretto@ero.eu)







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

**GORTANI**

**At Simeï 2024 Exploring Excellence Designed For Wineries Across The Globe**

A veritable journey into Gortani's world to explore the design, production and technologies that drive the success of some of the world's most famous wineries. The Friuli-based company, a global leader in the design and manufacturing of winemaking machinery and systems will participate in Simeï 2024. The stand located in a 600 square meter dedicated area, will showcase the Company's innovation and expertise offering visitors an engaging experience both physically and virtually with a specially created immersive tour of the Milan event. Guests will have the opportunity "to step" into Gortani's HQ in Amaro (Udine) and explore step-by-step, everything that contrib-

utes to creating excellence in the wine sector. From raw material to finished product: the virtual tour available at the stand will showcase the efforts of a family that has been supporting wine industry professionals for almost forty years. Now in its third generation, the family has also available a team of highly specialized technicians. Together, they embody the company's hallmark and will be at Simeï together, offering insights on how to innovate your winery sustainably. It is not by chance, in fact, that Gortani will also unveil its first sustainability report at this event, with a forward-looking approach.  
Info: [www.gortani.com](http://www.gortani.com)



**IDEAL**

**Ideal Solutions For Your Vineyards**



Since 1947 Ideal company has been producing sprayers of all kinds, and for protection of all types of crops, focusing on both product customization and innovation and keeping high its commitment in improving its offer, to meet both laws and markets requirements. Models for vineyard protection are many and with different features. Among low volume sprayers the most technological and environment-friendly remains Drop Save, allowing an automatic work as well as an average 50% recovery during the spraying season, thanks to its special computer and anti-drift panels. Differently, low volume sprayers like Diva and Supra models, can be equipped with their multi-row booms permitting to spray up to 3 rows contemporarily with a very low liquid supply per hectare, allowing focused and eco-friendly treatments. Also, Bora model deserves to be mentioned: its special

configuration with fan group hanging on tractor and tank trailed by a tracker drawbar makes it perfect to work on more rows of espaliers vineyards on hilly grounds, now available also in the "narrower version". In addition to low volume models, Ideal provides various sprayers with axial fan, for those farms having smaller extensions or special grounds. Among all, we would remind Loire and Alsazia Top sprayer, both with tower and reverse suction but differently configured to allow proper treatments according to vineyards features; and the new Bioair model, conceived to work with less powerful tractors thanks to its hydraulic engine and to ensure focused and proper treatments thanks to its 2 stainless steel vertical fans, which ensure a high and constant air volume and a spray direct to plants to avoid drift.  
Info: [www.idealitalia.it](http://www.idealitalia.it)

**MBF**

**MBF Will Be Present At The 30<sup>th</sup> SIMEI**

At the 30<sup>th</sup> edition of SIMEI, the world's largest machinery and equipment exhibition for the world of wine and spirits, MBF Spa will be present, boasting one of the longest-standing presences at the event. Since 1997 until today, MBF has consolidated its leading position in the production of bottling equipment in the wine & spirits sector through its subsidiaries and an extensive network

of national and international agencies, which operate on the global market to shorten distances and provide immediate support to all customers worldwide. The company will bring the latest innovations developed for the different markets, which will be presented in detail at the event. Flexibility and high customization are the fundamental requirements that distinguish MBF. At a time when it is essential to respond

to the increasingly differentiated demands of the market, it is important to meet the requirements of an increasingly demanding consumer, and being present with innovative solutions means being able to guarantee a clear response to the needs of an ever-changing market. MBF will be waiting for you in Hall 4 - Stand A22 C29 to show you the consolidated range of products and all the recent technologies developed.



**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.



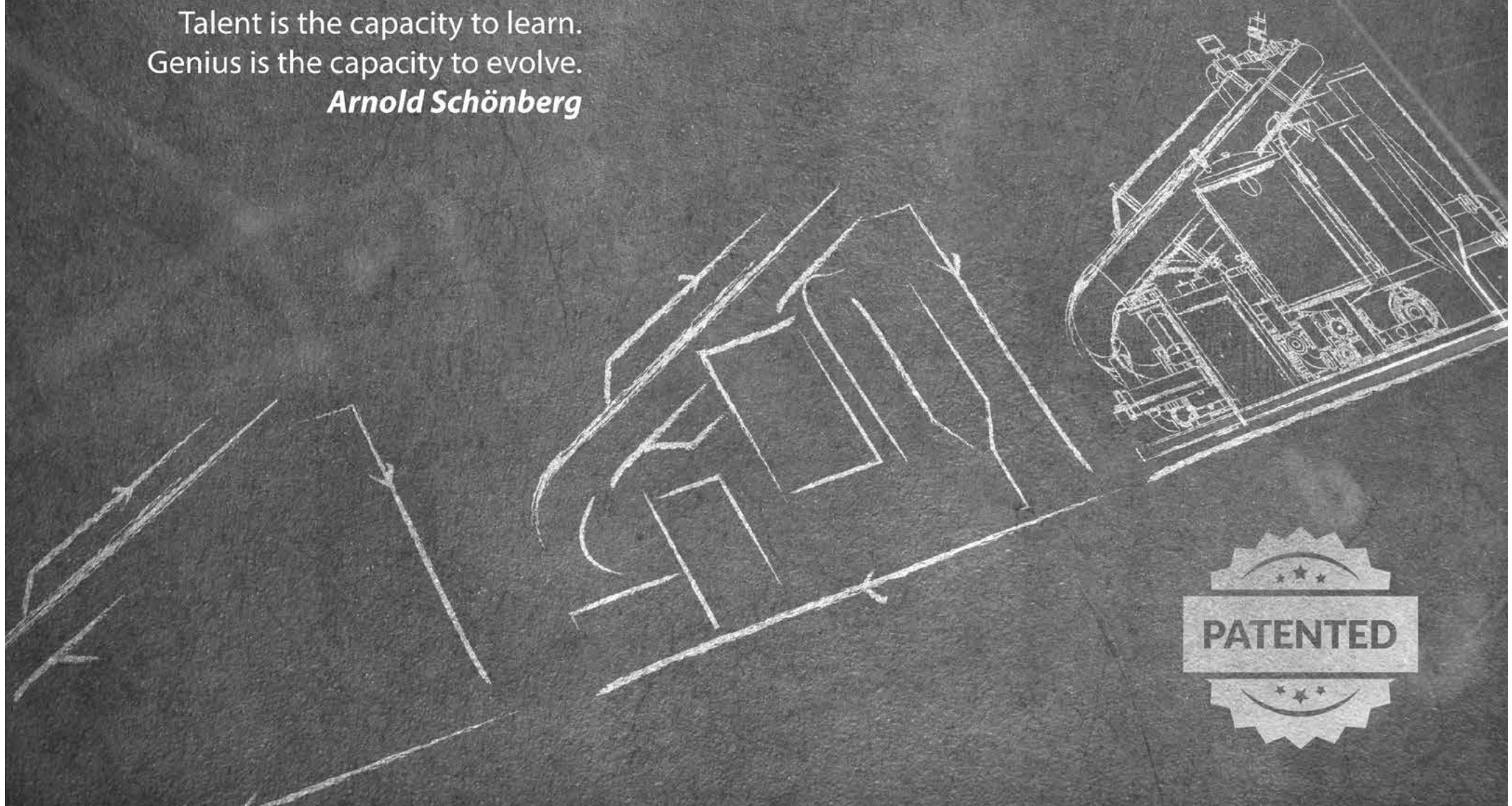


**ENOMECCANICA BOSIO®**

PRESENTS

 **Pythagora®**  
a theorem of excellence

Talent is the capacity to learn.  
Genius is the capacity to evolve.  
**Arnold Schönberg**



**THE REVOLUTION STARTS NOW.**

It all began with an idea - a propotype, 10 years ago.  
We observed, we studied, we designed. We evolved.

We now proudly present Pythagora: a celebration of our desire to grow  
and help others grow, an homage to our commitment to quality  
and costant improvement - today, tomorrow, always.

[enomeccanicabosio.it](http://enomeccanicabosio.it)

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