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ANNO 11 - NUMERO 3  
MARZO 2024  
DIRETTORE RESPONSABILE: ANGELO FRIGERIO



GUIDA BUYER

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SCENARIO

# Navigating into 2024 and beyond

By Federica Bartesaghi

Young generations, ready-to-drink, cans, labels, and lots, lots of bubbles. Today's trends, curiosities, and strategies to conquer tomorrow's market.

## Destinazione 2024 e oltre

Giovani, ready-to-drink, latine, etichette e tante, tante bollicine. Trend, curiosità e strategie di oggi, per vincere i consumi di domani.



### ITALIAN FINE WINES ARE SURFING THE MARKET

Across the globe, inflationary pressures have disadvantaged alcoholic beverages, which are not exactly staple food commodities. The direct consequence is a polarization of the market: in fact, it is the low-end products or, conversely, the very high-end ones that are growing. In this latter segment, Italy is certainly well-positioned and, despite a general contraction in the fine wine market, closed 2023 better than its French competitors. According to the Liv-Ex report (the benchmark index for this market), some of the best-performing wines are Italian, including Sassicaia 2019 from Tenuta San Guido, Tignanello from Antinori, and Brunello di Montalcino 2018 from Argiano, which also captured first place in the 'Top 100 Wines of 2023' by the American magazine Wine Spectator.

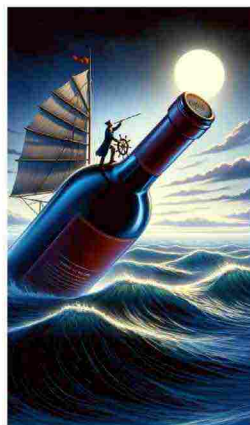


### THE KEYWORD IS: MODERATION

'Moderation' is the buzzword for 2024. Market projections for products with no or low alcohol content speak of a business worth 13 billion dollars, expected to grow at a CAGR of 6% until 2027. With improved visibility and social acceptance, NoLo beers have already established a strong presence in the market. But what's happening with alcohol-free wine? 'The industry needs to strain every sinew to capitalise on this health trend and bring alternatives such as no-and-low alcohol wines to technical and sensory maturity, so that they are perceived as a genuine alternative to wine by both merchants and consumers', affirms ProWein's Business Report 2023. Italian companies have heeded this call and developed innovative products. An example is the 'Zero SL Zero' 100% alcohol-free line by Cantine Sgarzi Luigi, made from dealcoholized wine, with the addition of grape must and natural flavors. Terre Cevico also developed a dedicated label: 'Meno' Lightly Sparkling Extra Dry, characterized by a low alcohol and calorie content.

### CAN-MANIA

For several years now, canned wine has been a trend under the analysts' spotlight and is already flourishing in some areas of the world. What are the arrows in their quiver? The youthful style and the convenience and lightness of the can - more sustainable than glass from an environmental standpoint as well. In 2023, the English chain Waitrose announced the elimination of all 187 ml glass wine bottles to replace them with aluminum cans, for an estimated annual saving of 320 tons of glass. And others might follow suit. The canned wine market, according to Grand View Research, is expected to grow at a CAGR of 12.3% until 2028, to reach or exceed 571.8 million dollars. A host of Italian companies already believe in this format's potential. Among these is Giacobazzi, which with 'Boliccino' also won the International Canned Wine Competition, or Cantine Sgarzi Luigi: with the now iconic 'Ciao' line and the innovative 'Movimento' line, it established itself as one of the most important players in this segment worldwide.



### PROSECCO FLIES HIGH

It's the wine-phenomenon of the decade, and despite the challenging current economic climate, its dominance in the sparkling wine market seems still unassailable. Naturally, we're talking about Prosecco. The Glera-based sparkling wine from the Veneto and Friuli regions, among the most exported Italian wines worldwide. Its strong international positioning is backed by plenty of initiatives, and among the most interesting are those concerning travel retail. In 2023, the Prosecco brand Bottega inaugurated a new 'Prosecco Bar' at Abu Dhabi International Airport: in December, a format first launched in 2014 on the Ms Viking Cinderella cruise ferry and that counts several locations in some of the busiest airports worldwide. Another top Prosecco brand, Villa Sandi, made its debut in the travel retail sector last year, with the opening of its first wine bar at Venice's Marco Polo Airport, a strategic hub for the upcoming 2026 Winter Olympics in Milan-Cortina.



From left: Alberto Niero (Ceo Italy - Lagardère Travel Retail), Monica Scarpa (Ceo Save Group), Giancarlo Moretti Polegato (Villa Sandi president)

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**READY-TO... ROCK**

To foresee the consumption patterns of tomorrow, the world's attention is on the new generation of potential alcohol beverage consumers, namely the Gen Z (1997-2012). This generation is typically described as open to new experiences and flavors, novelty and social sharing. Compared to the youthful world of beers and cocktails, wine seems to be at a disadvantage starting off. So how to connect with today's youth? Through fluid products that transcend boundaries: Spritz has paved the way. Some supporting data: if in the first six months of 2023 wine consumption collapsed in the United States, consumption of wine cocktails, often pre-mixed, registered a strong increase. Is the ready-to-drink trend set to take off in Europe as well? It's possible, given that Pernod Ricard has partnered with Coca-Cola to create a canned cocktail that will be launched in 2024, featuring Absolut vodka and Sprite. Globally, the ready-to-drink market was valued at 361 billion dollars in 2024 and is expected to rise at a CAGR of 4.81% until 2029. Among the Italian brands embarking on this path is Ponte1948, with its Choose line of ready-to-drink beverages, boasting a modest alcohol content of just 5.5%, and available in cans or bottle.

**THE DAWN OF THE CO-FERMENTED**

There is a new category of wines in town. We're talking about co-fermented wines. This name can actually refer to a very wide products' category. Basically, it applies to anything made by fermenting more than one substrate together, whether it is a more traditional wine crafted by fermenting different grape varieties together (including red and white grapes), or a more experimental wine made with a combination of grapes and other fruits, like apples, kiwis or blueberries. In the US a movement was also born in 2021, called 'Anything But Vinifera' (ABV), which is increasingly recognized by the public. In Italy, we have ciders, that are essentially fruit ferments. Nevertheless they are rarely associated with the world of wine, although experiments are underway in creating wine-beer and wine-cider hybrids. Are we at the dawn of a new category of alcoholic beverages?



**HARD SELTZER: THE NEW CRAZE FROM AMERICA**

We are talking about lightly alcoholic sparkling beverages (typically between 3% and 5% vol.), enriched with spices, fruit, and flavors, usually packaged in cans. They are the result of a fermentation process, which is why they often fall into the beer category (many producers are indeed breweries). The global hard seltzer market is expected to reach 49.4 billion dollars by 2028, growing at a CAGR of 31.4%. In the US, where hard seltzers were born about a decade ago, they have already achieved considerable success. In Italy, they are a relatively new drink concept, and therefore open up an almost unexplored market. This growth potential led two well-known Italian influencers, Fedez and Lazza, to launch their own hard seltzer on the market, called Boem. At the end of the 2023, Boem made its debut on the shelves of one of Italy's major retailers, Esselunga. Only time will tell whether or not this will succeed.



**WINNING COMBINATIONS**

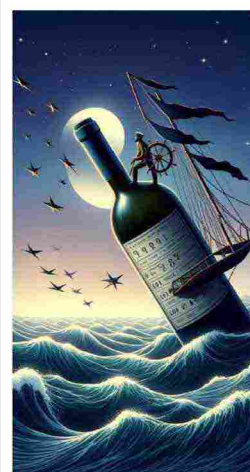
Forging partnerships between like-minded brands from different sectors is a highly favored marketing strategy among wineries willing to build a strong brand image and positioning. Consider Valdo Spumanti, the official wine supplier of AS Roma, the partnership between Ferrari Trento and Juventus, or again Astoria Wines, a partner of the Giro d'Italia cycling race. Another successful pairing? Wine and fashion, of course, with the Vendemmia di Montenapoleone in Milan - a key event for the Milan's fashion district - reaching its peak. Among the 'stars' of the last edition were Allegrini and Castello di Fonterufoli, Mionetto and Valdo, Masi, and VB+. Cinema and wine are another powerful pair. In this case, Fantini was a standout at the 80th Venice Film Festival inside the Hollywood Celebrities Lounge. And the list of successful partnerships goes on.

**EYES ON THE LABEL**

The new European wine labeling regulation came into effect last December 8, mandating the disclosure of ingredient lists and nutritional information on labels (or through a QR code). It's a ground-breaking revolution for European producers, now asked to declare all enzymes and additives used in winemaking. What the industry still awaits to understand is consumers' reaction. A survey by Wine Intelligence involving nearly 12,000 consumers from 10 countries reveals that about 40% of respondents consider wine a natural product free from additives. Meanwhile, a quarter of respondents (26%) believe that only low-quality wines contain additives. In the face of a confused and poorly informed consumer base, producers of so-called 'natural' wines, who eschew oenological interventions in the vineyard or cellar, are likely to benefit. 'So-called' because, to date, there is no legal definition for the category. A good discussion topic for European legislators now that the label issue seems to be settled?

**PERSONALIZATION AND AI**

In an era of mass consumption, customization is a significant plus. This is well understood by wineries, which offer the option to personalize labels or gift boxes, especially during major festivals. For Christmas, Ferrari Trento introduced a customization service for the Magnum format of their Ferrari Maximum Blanc de Blancs. But packaging customization is just the first step. With Artificial Intelligence, many projects are underway to offer the right wine to the right person by creating digital 'taste maps' that incorporate data on production, reviews, tastings, and prices to generate personalized recommendations. In a step further, the French winery Aubert & Mathieu has even attempted to produce a wine based on AI-provided suggestions regarding grape varieties, blends, fermentation temperatures, and aging methods. The AI also came up with a name, 'The End', and suggested a retail price of 100 euros. However, the latter was the only suggestion that the winery chose not to follow, opting for a more 'democratic' price of about 30 euros...



VINI&CONSUMI #3 - MARCH 2024

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