

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Italy

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### Italy's Wine Overview 2015

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Wine

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**Report Highlights:**

Italy's CY 2014 wine production is estimated at 4.4 billion liters, 15 percent less than the previous campaign (5.2 billion liters) and 7 percent below the five-year average, as a result of a rainy summer. Italy's wine exports remained stable at 2 billion liters valued at \$6.7 billion in 2014.

## Italy's Wine Overview

### Production

Italy's CY 2014 wine production is estimated at 4.4 billion liters, 15 percent less than the previous campaign (5.2 billion liters) and 7 percent below the five-year average, as a result of a rainy summer. Veneto, Emilia Romagna, Puglia, and Sicily together produce almost 60 percent of the Italian wine production. Wine production decreased by 40 percent in Sicily; 25 percent in Campania and Lombardia; 20 percent in Apulia, Trentino Alto Adige, and Sardinia; 15 percent in Veneto, Abruzzo, and Piedmont; 10 percent in Emilia Romagna and Friuli Venezia Giulia; and 5 percent in Marche. Only Toscana, and Lazio and Umbria registered production increases of 10 and 5 percent, respectively. Reportedly, quality is good on average. The harvest started mid-August through the beginning of November, reaching its peak during the last week of September. Approximately one-third of Italy's wine production is Controlled Appellation (DOC and DOCG) - mostly from the Northern and, to a lesser extent, Central regions. According to industry contacts, the most popular grape varieties for red wine are *Montepulciano*, *Barbera*, *Sangiovese*, and *Merlot*. *Tocai* is the most popular choice of white wine and *Montepulciano* for rosé. In white wine, other popular grapes are *Prosecco*, *Chardonnay*, and *Pinot Grigio*. In rosé, *Pinot Noir* and *Negroamaro* grapes experienced an increase in their popularity over CY2013.

### Consumption

Wine consumption has been declining in Italy for decades. Causes for the trend include changing lifestyles and tastes, as well as anti-alcohol drinking campaigns. According to the Italian Association of Enologists (Assoenologi), Italy's 2014 per capita wine consumption is estimated to be less than 40 liters, considerably lower than the 45 liters in 2007 and 110 liters in the 70s. Recent wine consumer surveys show that Italian origin and familiarity with the winery are the main elements in determining consumer choice. Despite economic austerity measures, Italian wine consumers are seeking higher quality wines but still in the modest price range. However, in general, consumer preferences are gradually shifting to other alcoholic beverages such as beer, liqueurs, and spirits. This trend is more noticeable when discussing occasional and out-of-home consumption than daily consumption, which is still centered on wine.

### Trade

Italy's wine exports remained stable at 2 billion liters valued at \$6.7 billion in 2014. The United States (293 million liters valued at 1.5 billion), Germany (588 million liters valued at \$1.3 billion), and the United Kingdom (296 million liters valued at \$867 million) were the leading destinations for Italian wine. Italy's wine imports reached 255 million liters valued at \$380 million in 2014, mainly from France (19 million liters valued at \$192 million), Spain (164 million liters valued at \$78 million), and the United States (47 million liters valued at \$60 million) that confirmed to be the leading suppliers to

the Italian wine market.

**Table 1: Italian wine exports**

Partner Country	Unit	2012		2013		2014	
		USD	Quantity	USD	Quantity	USD	Quantity
<b>World</b>	<b>L</b>	<b>5,993,067,383</b>	<b>2,098,188,368</b>	<b>6,655,572,292</b>	<b>2,005,956,023</b>	<b>6,729,444,521</b>	<b>2,022,723,060</b>
United States	L	1,278,985,264	288,918,640	1,412,648,558	290,591,853	1,474,280,178	292,670,226
Germany	L	1,227,478,328	611,088,870	1,350,048,600	586,434,324	1,288,367,849	587,644,121
United Kingdom	L	686,238,669	287,624,835	821,044,657	290,435,411	867,184,012	295,676,816
Switzerland	L	382,601,461	69,839,915	414,970,939	66,750,473	420,997,076	70,412,969
Canada	L	363,282,903	70,996,122	371,990,959	68,816,119	365,500,373	68,387,557
Japan	L	197,687,763	44,073,559	203,845,374	42,369,942	201,801,702	42,822,605
Sweden	L	157,132,397	41,943,290	186,859,859	46,883,102	190,203,499	48,057,619
Denmark	L	160,807,576	35,621,033	176,909,745	39,403,874	186,245,483	41,631,034
France	L	160,003,733	94,410,423	183,885,566	84,690,214	171,721,517	84,236,145
Netherlands	L	148,312,493	46,099,169	154,959,822	44,343,005	159,286,751	43,828,790
Russia	L	126,911,150	53,102,412	152,799,437	43,876,124	135,270,325	40,783,252
Belgium	L	101,902,446	26,889,115	121,702,387	28,127,510	132,895,656	29,638,252
Austria	L	126,259,405	54,486,545	133,976,519	50,644,306	129,629,396	50,482,922
Norway	L	99,739,772	22,251,306	115,456,183	23,154,478	127,187,231	25,737,923
China	L	96,617,860	32,068,382	97,850,106	21,507,238	98,536,292	25,211,955
Spain	L	45,981,448	24,797,750	51,956,522	20,854,223	53,262,098	23,293,040
Latvia	L	26,046,454	6,915,958	33,412,352	7,593,799	51,634,664	10,449,912
Australia	L	38,103,222	8,068,314	44,780,836	8,348,322	50,035,519	9,107,262
Poland	L	33,163,710	15,681,666	40,664,263	13,953,016	49,138,338	17,124,263
Czech Republic	L	43,306,184	32,887,788	45,124,169	28,640,142	42,763,483	29,580,104

Source: GTA

**Table 2: Italian wine imports**

Partner Country	Unit	2012		2013		2014	
		USD	Quantity	USD	Quantity	USD	Quantity
World	L	382,014,847	261,282,436	415,889,788	256,105,473	379,878,403	254,781,643
France	L	193,599,362	24,708,607	185,774,852	22,563,675	191,957,395	18,793,278
Spain	L	99,425,728	177,698,070	112,183,408	148,431,714	77,791,345	164,314,332
United States	L	44,451,622	41,861,267	61,358,033	45,423,014	59,923,394	47,294,586
Germany	L	10,175,823	2,485,431	7,802,093	2,822,174	13,859,270	5,896,942
Australia	L	694,969	214,546	4,886,632	3,562,003	12,305,542	9,814,330
Portugal	L	7,959,508	2,331,927	8,658,647	3,059,048	7,965,663	1,828,035
Austria	L	3,688,161	1,494,943	2,722,132	1,430,194	2,280,529	1,381,039
Hungary	L	1,671,207	1,280,320	1,317,202	869,714	1,618,681	1,430,838
United Kingdom	L	4,063,479	95,918	2,840,736	344,437	1,127,734	64,471
Switzerland	L	1,043,430	44,602	958,727	118,066	1,008,472	66,097
Slovenia	L	471,542	259,454	974,334	445,002	980,937	259,784
Chile	L	1,594,723	485,293	3,447,817	2,718,040	973,734	315,588
Romania	L	1,204,506	625,612	1,021,408	526,223	942,990	481,453
Argentina	L	1,355,408	481,805	799,156	234,180	934,044	255,176
South Africa	L	427,425	207,944	13,878,297	19,243,969	897,882	753,455
New Zealand	L	388,102	60,378	196,456	27,956	808,419	191,404
Netherlands	L	1,348,497	122,219	2,153,922	107,788	722,348	470,447
Greece	L	1,914,165	1,195,167	1,512,382	1,017,782	614,097	500,471
Israel	L	545,412	86,180	365,581	59,646	587,051	81,776
Croatia	L	192,840	99,113	78,729	18,442	391,343	18,290

Source: GTA

### *Abbreviations and definitions used in this report*

#### **Harmonized System (HS) codes:**

Grape wine total: 2204

**L**= Liters

**CY** = Calendar Year; wine production of a specific CY refers to the wine made from the wine grapes harvested in that CY. I.e. 2014 production refers to wines made from grapes harvested in Fall 2014.

**DOC**= Denomination of Controlled Origin

**DOCG**= Denomination of Controlled and Guaranteed Origin

**PDO** = Protected Denomination of Origin

**PGI** = Protected Geographical Indication