

THE WINES AND VINES
OF ITALY

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In loving memory of my cousin Alvaro, who was the first to introduce me to the knowledge and appreciation of the quality of wine.

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Introduction

Italy benefits from particularly favorable weather, geologic and topographic conditions. A large diversity of climates and micro-climates conflicting from Valle d'Aosta to Sicily, high average temperatures, hot summers and short periods of intense cold, many hours of sunlight, optimum exposure of the vineyards, moderate precipitations, and appropriate ground (sandy, poor, rich in organic matter) are favorable conditions for the development of wine making.

Wine production is extended over the whole peninsula and every region has its own climate, areas with mountains, plains, valleys, some with intense vegetation, others more arid, all of them fertile.

Terroir is the word used in describing the wine production that expresses the synergy created by the ground on which the wine is made, such as the chemical components, morphology, exposure to solar radiation, particular climate and atmospheric conditions of an area.

Such particularly favorable conditions have not been used during the last fifty years to make quality wines, but almost exclusively for non-specialized common-use products. This was the general situation, with a few specific exceptions, such as the Piedmont region, that more than any others was influenced by French culture, maintaining its typical characteristics.

In Italy, wine-making evolved more during the last decades than over the previous centuries.

Italian oenology, for historic, economic and social reasons, always preferred quantity over quality. In the past, the low spending power and demands, inefficient production mainly due to a lack of entrepreneurship and oenologic culture, kept down the quality of Italian wine. Until recently, insufficient legislation and institutional and bureaucratic misconducts did the rest.

Following is a brief account of this evolution over the last century and a look at the situation today.

The first attempt to regulate the wine-production sector took place in the early 20th century, by the hand of a few Piedmont parliamentarians.

In the 1920s, early legislation was created, followed a decade later by a modification to the first law. This modification, which was supposed to rectify omissions and inaccuracies of the first, turned out to be disastrous, since it wasn't followed by any enforcement regulation and had also the effect of abolishing the previous arrangements.

The Italian norms had the objective of regulating the oenological level and the quality of the wines, and were very different from those in place today. While France was beginning to create a new and more complete method of standardization resulting in the establishment of the Appellations d'Origine Controlées – AOC – in 1935, Italy undid the previous efforts to create a legislative system for the protection of the wine-production sector.

As far as the agricultural situation at the beginning of the century was concerned, after a period of strikes and unrest due to the low pays of the workers, with the establishment of the Giolitti and Zanardelli government, there followed the implementation of more liberal policies, aimed at impartial competition between capital and work.

Agrarian income went from approximately 3 to 8 billion Liras-gold, representing about half of the Gross National Income. The first decade of the 20th century was a positive period for export, with sales of 1,283,726 hectoliters of tap wine and 10,379,056 hectoliters of bottled wine, for a total of 48,710,000 liras, especially towards the French, Swiss and British markets.

Wine importation over the 1900-1910 period was of 61,540 hectoliters in casks and kegs and of 621,300 bottles for a total value of 3,306,000 liras. Therefore, an exported bottle earned 1.25 liras, while an imported bottle cost about 2.70 liras.

The main problems had to do with the quality of the fermentation which was mostly poor, except for some rare cases. What emerged was a situation in which the higher classes demanded high quality wine, while all the production of low quality wine was for taverns and personal use. During that period, average consumption per person was 119.6 liters every year.

The phylloxera pest, which had arrived in Europe in 1860, continued to expand across the country during the early 1900s, leaving few areas untouched. This epidemic had horrible effects on wine-production and on the economy, but also had positive outcomes, because it induced great changes in the production methods.

Law imposed replanting American stocks which forced a reconstruction of the vineyards on new secure and more rational bases. Intensive methods were gradually introduced, with Guyot training systems with iron wire and dry poles, without growing crops of cereals, forage or legumes between the rows of vines, as was the custom before.

The years 1900 and 1906 were exceptionally favorable both in Italy and France, but the great wine-production crisis because of the phylloxera, plasmopara and the rains, the big French producers were forced to import large quantities of wine. Because the sale of wine was well paid for, this situation brought an increase in adulterations and of often violent reactions against the abuses in France.

The first attempts to specialize the sector began at the beginning of the century with the creation in 1891 of the “Società degli Enotecnici Italiani” [Society of Italian Oeno-technicians] in Conegliano, founded by Arturo Marescalchi that counted 150 members, and with the publication of a magazine for professionals.

During this period the first machinery for making bottles was produced. Until then, bottles were mouth-blown, so the invention resulted in an increase of production and a reduction of costs. However, the traditional flask continued to be used, especially in Tuscany, giving work to approximately 3,000 people.

In Piedmont, production was centralized and dominated by large companies. Approximately 20 production Houses, among which famous names such as Bosca, Carpano, Calissano, Cinzano Cora, Gancia and Martini & Rossi bottled 4.7 million of the 5 and a half million hectoliters of wine of the whole region. These companies controlled vast areas managed directly or by grape purchasing agreements, developing a widespread commercial policy for the sale of wines, sparkling wines, and vermouth.

Wine consumption was spread across three consumer brackets: the new bourgeoisie went to Tuscan innkeepers and small restaurants, the proletariat to the “Trani” inns, while the “upper class” preferred large hotels, then called “palaces” where the main product consumed was French Champagne and small quantities of Italian *sciampagnas*. The monarchs and the aristocracy not only drank Champagne, but also good wines from Bordeaux and Bourgogne. France dominated and the menus were written in French.

Members of the artistic and literary movement of the Scapigliatura, centered in Milan, diligently frequented the city's inns. Giuseppe Rovani, founder of the movement, was ruined from too much liquor, while other members, like Camillo and Arrigo Boito, Emilio Praga, and Tranquillo Cremona were penalized by excessive wine consumption. To limit the damage provoked by wine abuse, limits on sale hours and a tax hike on alcoholic beverage were placed. The price of wine went down from 72 liras per hectoliter in 1815 to 18 liras in 1872 because of the generalization of sulfur, perceived as healthy for the vineyard and the consumer.

At the beginning of the century, a tax hike on wine was proposed from 10 to 50 liras per hectoliter. It was judged as excessive and unbearable and led to popular unrest. To sweeten the consequences of this raise in prices, politicians promised the abolition of the duty fee, which was abolished only in 1930 and replaced by township consumer fees, the predecessors of today's I.V.A. sales tax.

The early 20th century was a period in which great importance was bestowed upon expositions and medals earned in Paris, London, Vienna, Brussels, Chicago and St. Louis. Other reference points were the titles of Supplier to the Royal House, and Supplier to the Apostolic Palaces of the Holy See. The exposition in Paris in 1900 counted the presence of the Piedmont wines Barolo, Barbaresco, Barbera, Nebbiolo and Grignolino of the Calissano, Contratto, Cinzano, Cora and Gancia houses, analyzed by the Regia Stazione Enologica [Royal Oenologic Station] of Asti before being approved by the Ministry of Agriculture for the exposition.

The principal themes early in the century were sulfur dioxide and its properties, processing techniques of the Moscato d'Asti, re-fermentation in autoclave with the

Martinotti method, which is still today an ideal method for sparkling wines to be drunk young and is known as the Charmat method, having been perfected by the French researcher who then marketed the technique.

The main center for wine commerce at the beginning of the century was Milan, where the *Unione Italiana Vini* [Italian Wine Union] was founded in 1895 with the intent of creating relations between producers and merchants and of establishing a network of laboratories for the inspection of the purity and quality of the wines. This institution, presided over by Francesco Folonari, published an Official Bulletin that soon became a weekly publication dedicated to wine commerce, named “*Il Corriere Vinicolo*” in 1928.

During this period, Giovanni Dalmasso began his studies on wine and wine-making, elaborating on the index of grape ripening, the fractometric degree and the total acidity. Ampelography began to change after the introduction of Pinot noir to the Rocca dei Giorgi in the Oltrepò Pavese area. It was initially welcomed with skepticism by local producers, but slowly proliferated. Almost at the same time, Pinot noir was introduced in Alto Adige through clones produced in Wandenswill (Zürich canton in Switzerland) together with Pinot blanc. The first attempts at Chardonnay began in Trentino with Giulio Ferrari who began a small but significant production of sparkling wines obtained through the Champenois method labeled *Denominazione Champagne di Trento*, which was allowed at the time.

In Veneto, Giovan Battista Perez published the essay “*La provincia di Verona e i suoi vini*” [The Province of Verona and its Wines] in 1900 and in 1906 published the “*Carta Enologica*”, which listed the wines of the Valpolicella, the Valpantena, the district of Verona, the Mezzane hills and Soave.

A reference point not only for Veneto oenology, but for Italian as well, is the Oenologic School of Conegliano, founded by Antonio Carpenè in 1876, who modified the Charmat system in order to adapt it to the production of sparkling Prosecco.

The Prosecco grape, until then considered second-rate, became more and more important with the qualifications Prosecco tondo and Prosecco Balbi, after its inventor.

In Tuscany, the *Statuto del Sindacato Enologico Cooperativo* [Statute of the Oenologic Cooperative Union] was written in 1903 in Siena, with the objective of safeguarding the image of the “*Vino del Chianti*” [Chianti Wine] that until then had been of variable quality and lacked homogeneousness and well defined characteristics. Nonetheless, researcher Giovanni Briosi, who had performed comparative studies of Italian wines present at the international expo in Paris, gave a very positive evaluation of the Chianti, because “its components are contained in the right proportions; a red wine that is more pleasant and perhaps – although less substantial – more delicate and homogeneous than Barolo”.

At the beginning of the century Florence again became an important center for culture and wine-production. At the Giubbe Rosse café, two young Florentines were active, Giovanni Papini and Luigi Prezzolini. The British and some Americans drank Chianti and ate T-bone steaks of meat from the Valdichiana in the 'Buche', which became so

important that they were mentioned in the Encyclopedia Britannica as the best restaurants of Italy, where the best food and drink were served.

In this period, life conditions for workers were precarious, field hands were underpaid, transportation and communication were difficult. However, the typical joie-de-vivre persisted as underlined by the songs of the time and by Odoardo Spadaro extolling Chianti wine's virtues.

The famous tenor Enrico Caruso was the most eminent promoter of wines from Campania, which were increasingly exported towards the United States, especially those from Ravello and the island of Ischia.

In the Marche region, changes happened quietly. In 1908, after the success at the Vienna exposition of 1873, Dottori and Vescovi proposed producing high quality sparkling Verdicchio. Gioacchino Garofoli organized production and sale of the best wines from the Marche. The ancient mixed crops with vines were slowly transitioned according to the new production techniques.

Production and demand of wines from Umbria were mainly focused on wines from Orvieto, sold especially in Rome, where it was preferred to Frascati wines by the bourgeoisie and the clergy. Luigi Bigi obtained commercial success bottling wine in small flasks called 'pulcianella'.

Apulia, known as Europe's Cellar, supplied cutting and blending wines to the north via trains, in thousands of tank cars. The cars were supplied by the North for the so-called 'miere', the good local wine distributed then in northern Italy, France, Switzerland and the Austro-Hungarian empire.

At the time, with the beginning of the Belle Epoque and Liberty styles, Sicily was known and appreciated for Marsala, its most famous and ancient wine.

At the beginning of the century, Sardinia saw the arrival of Gabriele d'Annunzio for a wild May trip. The poet, although almost a teetotal, demonstrated a considerable knowledge of oenology. He was accompanied by two friends from the literary world, far from teetotals themselves, Cesare Pascarella and Edoardo Scarfoglio. D'Annunzio wrote that he witnessed the 'vastest plastering' he had ever seen.

In the same period, the city of Alghero hosted two passionate Piedmontese hunters who were also wine experts: Erminio Sella and Edoardo Mosca, who bought the property of Nuraghe Majore. The company was established in 1903 and in 1908 created the first modern and rational method fermentation cellar in Sardinia. From the start, the idea was to concentrate on the production of local wines: Nuragus and Vermentino white wines, Cannonau and Carignano red wines.

1917 was a memorable year for the quality of Piedmontese wines. Alberto Contratto created his first Champenois method millesimato, released three years later under the name Contratto Brut Riserva 1917. In proud nationalistic spirit, Contratto wrote to the Minister of Agriculture: "The natural fermentation and aging sparkling wines branch was created, I must say, with uninterested faith and enthusiasm, for the aristocratic beauty of

the branch itself, to make it independent from foreign countries, and to elevate us to the perfection of the French brands”.

In 1919 began the real advertisement of the sparkling wine sector with the Milanese company Dalmonte presenting Gancia Gran Riserva in the 'History of the Most Beautiful Diamonds of the World'. Back then ads were mainly billboards and the main production companies such as Campari, Cinzano, Martini and Rossi adopted them to conquer the national market.

Between 1911 and 1914 the Istituto sperimentale per l'enologia [Experimental Institute of Oenology] in Asti became larger and established a new branch in via Pietro Micca, where it still is today. Researchers Carlo Mensio and Garino-Canina took care of the refinement of Piedmontese superior type red wines recognizing the importance of the malic acid which confers a sour and coarse taste to wine. They introduced malolactic fermentation to the process, which eliminates the malic acid and lowers the level of total acidity and of tartaric and tannic acids, raising volatile esters, resulting in a supple and velvety wine with more elegant fragrances.

After a century, the result of their research is still valid. Carlo Mensio was also interested in solving other problems, such as the curling of Barbera and vine defense issues.

The use of chemical products was accepted practically everywhere, and the use of sulphur and pesticide blends made up of copper sulphate and slaked lime applied to the vine against downy mildew became a common technique.

During World War I, wine production went down, resulting in a reduction of the Guyot method and the method of sustaining vines with wires, already common in high vine density areas.

It was the 1920 vintage that gave new life to wine producers: not only did they obtain one of the most bountiful harvests of the century, they also were able to sell the wine at some of the highest prices ever reached (2.8 liras per kilo in Piedmont). A 12 bottle case of Barolo was sold at the La Morra Social Cantine for 24 liras and a drum was 105 liras per hectoliter.

Before becoming a senator and then President of the Republic, Luigi Einaudi was a pioneer in wine-making. In 1919 he bought the Cascina San Giacomo in Dogliani, a property of approximately fifteen hectares. A great liberal economist, he always opposed state intervention in the economy and was against monopolies. He was always attached to the values of the land and once wrote “Men and families do not conceive themselves eradicated from their land, their home, their township of birth”.

He set an example in the enhancement of the Italian territory and monuments well before these ideas become of national interest. He was also responsible for the restoration of the Serralunga castle in the Langhe, which once belonged to the Fallettis.

Environmental issues weren't a novelty. At the beginning of the century there were many complaints on behalf of the farmers, who claimed that steam from locomotives and fumes from factories damaged the crops.

At the time, grapes were pressed in vats, barefoot, because it was said that it was more delicate on the fruit, so the peels wouldn't break, the seeds wouldn't get crushed and the stalks wouldn't get damaged.

Whoever was thinner and leaner was given the task of washing the casks with a brush and caustic soda in order to remove any tartrates deposited on the inside. The more perfectionists even washed the outside of the casks with a sponge and some potassium metabisulfite going over it again with some Vaseline oil.

The mold that would appear in the cement vats was eliminated by fumigating them with sulfur when closed, as well as by using asbestos, which was not considered dangerous, back then.

Between 1911 and 1920, wine consumption went down to 112.1 liters per person from 119.6 of the previous decade. Exportation maintained good levels, earning 3,543,500 liras for the sale of 13,400 hectoliters in casks and kegs and approximately 5,500,000 bottles. The total amount of wine sold over that period had a value of 141,726,600 liras, of which approximately 37 million for bottled wine at an average price of approximately 2.2 liras a bottle.

Between 1914 and 1918, wine production in Veneto suffered because of the war, in addition to destruction at the hand of the phylloxera.

It is also certain that production and fermentation methods of the time, with some rare exceptions, were questionable. The vineyards were often very old and the many varieties were cultivated randomly together. Vintages took place without separating the different varieties, except by color. It was a common practice to add substances which would put someone in jail, today. Apart from caramelized sugar, it was common to add cochineal, poppy flowers, berries and poisonous shrubs as coloring and other products as well according to the creativity of the producer.

Certain oenologists, including Carpenè, became active in changing these production methods, but it wasn't easy to change the ways of an ultra-conservative farmer world opposed to any changes.

In Emilia-Romagna, the phylloxera destroyed approximately 500,000 mixed cultivation vines and over 120 hectares of specialized cultivation vines. Bologna was always an important center for wine-making with grapes produced in the areas of Monte San Pietro and Zola Predosa. Students of the University of Bologna have always appreciated good wine, and *Il Goliardo*, in 1912, counseled the students on what to avoid: “*Matricula fetentissima, vina anaquatissima, foemina honestissima, libra carissima*” [Freshmen who are too rotten, wine that is too watered down, women who are too honest, books that are too expensive].

Tuscany slowly began to change the structure of its vineyards. Olive groves were separated from vineyards, distance between the plants and the size of the leaves were reduced, grapes began to be picked at the right moment, molds on the plants were avoided and the first selections by cloning were attempted.

The most famous Tuscan wine is doubtlessly Chianti, originating from an area of approximately 70,000 hectares over several provinces. Its ancient name back in the Middle

Ages was *Vermiglio*, later substituted by the geographic indication of Chianti in the 14th century, as reported in the accounts of the Compagnia del Banco of Francesco Datini, the inventor of the promissory note.

At the time, wine-making happened by putting together several types of grapes such as Sangiovese, Canaiolo, Colorino, Trebbiano and re-fermenting the wine a second time with slightly dried grapes, a method known as *governo*, an invention attributed to the *Iron Baron* Ricasoli.

Ferruccio Biondi-Santi selected a clone of Sangiovese grosso and for the first time made a wine from this mono-culture, followed by his son Tancredi who promoted it worldwide, until 1996, under the name of Brunello.

The need to protect designations wasn't a new concept. The first proposal by the Hon. Teobaldo Calissano dates back to 1904, but the first bill was presented by the Hon. Marescalchi in 1921. The law for the protection of typical wines was finally passed in 1926. The definition of typical wines as indicated in the applicative regulation of 1927 was similar to today's DOC one. It read: "Wines are considered typical when, being genuine in accordance with current dispositions, they display characteristics of fineness and quality, derived from the variety, the area of production and the manufacturing method".

Considering the times, the regulation was complete and well defined, but it didn't work because of disagreements among professionals of the different consortiums.

In 1930 a new regulation modified the former to satisfy the consortiums, establishing that a consortium could be constituted by those who produced and sold a certain wine. It was made clear that typical wine producers were not only the vine growers who obtained the wine from their grapes, but also the industrials who obtained the wine from grapes, musts and wines purchased in a limited area. It was also made clear that a particular typical wine could be constituted only in one consortium. The establishment of consortiums was left to private initiative, indicating only what consortiums were allowed to do and how.

Three years later the law was modified in those cases in which a type of wine was produced in two different provinces. In this case the decision was up to the Provincial Corporative Economic Council, summoned by the Finance Minister. If the decision was not unanimous, the Commission would be presided over by a delegate of the Minister of Agriculture. Finally, in 1937, a new reform abolished consortiums for the protection of wine. It resulted in no new legislation for the protection of wines of origin until the 1960s.

A problem that penalized Italian wines for many decades was its apparel. The lack of labels, or mediocre ones, often gave the idea of a low quality product. French producers were the first to understand and attend to this aspect: "A bon vin, belle et loyale enseigne" [For a good wine, a beautiful and faithful label].

The type, format and quality of the container are very important. The Piedmontese were the first to understand this by introducing the first modern labels for the Marchesi di Barolo, Giacomo Borgogno and Francesco Rinaldi. The bottles used more and more often were the *bordolese*, *borgognotta* and *champagnotta*.

The two decades between 1920 and 1940 were far from favorable to wine making, due to the ignorance about the ecosystem, the archaic production methods and a lack of production technique and technology development. To build new vineyards, the plowing and terracing were done by hand, at extremely high costs. The use of steam power to action balanced plows was rare and cumbersome, and the first tractors weren't built until later, even then very limited and quite heavy with a maximum Horsepower of 70. The Fascist politics were tied to the past with animal traction plows, even though multi-ploshare plows that saved time, money and strength were available. Meanwhile, the cellars began using both manual and mechanic grape pressers. However, these new achievements weren't viewed positively by the political system of the time, considering its slogans such as “It is the plow that traces the furrow, but it is the sword that defends it”.

But things started moving forward in Tuscany. After considerable efforts, Adamo Fanetti produced a wine that up until then was known as *Vino rosso scelto di Montepulciano*, and of which he produced approximately 3 tons, naming it *Vino Nobile di Montepulciano*, selling almost all of it in bottles at 2 liras a bottle.

But a dominant role was played more and more by Chianti. On May 24, 1924, thirty-three producers of the most ancient and considered classical territory, met in Radda in Chianti to create the *Consortium for the protection of Chianti wine and its 'origin' brand*. The symbol chosen was a black rooster (Gallo Nero) which had been the military symbol of the area in the 16th century.

In 1932, seven areas were recognized and defined, with small additions to the Chianti Classico. Borders have remained untouched since then, but DOCG statutes today recognize Chianti Classico as the most ancient area of origin.

This was the first Consortium in Italy for wine protection, constituted before any legislation and classification of wine-production areas. The project for the protection of typical wines was presented in 1921 by the Hon. Arturo Marescalchi, but it wasn't until 1930, when he became undersecretary to the Ministry of Agriculture, that Minister Giacomo Acerbo passed a law allowing producers to unite in consortiums to protect their wine, under State control.

Until the 1920s, regional characteristics predominated cuisine and wines, but with the advent of Tuscan restaurants, Tuscan wines began to be sold alongside those from the Oltrepò Pavese and the areas around Milan.

Wine consumption in Italy between 1921 and 1930 had a yearly average of 112.7 liters per person and the average amount of wine produced was approximately 45 million hectoliters. Alcohol consumption excess was regularly denounced by doctors and it wasn't rare for parents to give wine to their kids, and in certain valleys, even *grappa*. This led to a policy of prevention, limiting sale hours and sanctioning drunkenness. Educational and dissuasive bills were printed with the objective of reducing this serious situation.

1921 was an abundant year in the Castelli Romani area, with a production of 400,000 hectoliters, that dropped to 270,000 in 1922 due to a drought. Grapes were picked

between mid-September and late October, and sometimes beyond mid-November, if the weather allowed it. The bunches of grapes began to dry on the plant, producing wine of a more intense color and slightly sweeter scents, strongly appreciated by the clients of the Roman inns. This was the golden age for the sweet *cannellino*, so called because of the *erba cannella* which grew between the vine rows, bestowing particular aromas to the wine.

During the 1921-1930 decade, the province of Rome had 123,700 hectares of vine cultivation, mainly in the hilly areas, of which 40,000 of specialized cultivation and the rest promiscuous. Between 1920 and 1925, the experimental chemical-agrarian Station in Rome, noticed important technological changes in the factories belonging to large cooperatives or big producers: a supply of modern machinery, decent fermentation containers and large casks, mainly in cement. Vines were cultivated low down, sustained by canes set up in a spindle shape, called *a conocchia*. The wines obtained were better structured and with a higher alcohol level.

Technicians, their line of work and suggestions, were not seen in a good light, and the Society of Italian Oeno-technicians was broken up and replaced in 1927 by a new corporation established by the Labour Charter with very few concrete results, often negative, such as the battle of wheat used so much in propaganda, and the ecologically ruinous reclamation of swamps. Under Fascism, wine was not considered an important product. Cereal cultivation dominated over grape, which was frequently eliminated even in hilly areas that weren't that good for grain anyway, and replaced just to produce bread.

Oltrepò Pavese became the main area of grape production, then distributed to the great Piedmontese sparkling wine producers, beginning the development of important local cellars such as Frecciarossa, Villa Otero, and La Versa for the sale of local quality wines.

For twenty years until 1932, Campania was the main region of production with over 900'000 tons of grapes produced over approximately 220,000 hectares of vineyards, of which 52 of specialized cultivation, producing 6,300,000 hectoliters in total a year. But local wine-producers didn't follow the suggestions of the Oenologic School of Avellino and were battered by two waves of phylloxera that lasted until World War II.

In Basilicata, then called Lucania, the very ancient wine tradition was developed in 1925 by the Paternoster firm in Barile. There, the Aglianico del Vulture grape grown on volcanic soil was appreciated all over the national market, especially in the sparkling version.

In Apulia, rosé wines played a more important role, especially those from the Salento area, of which the most important producer was Leone de Castris of Salice Salentino, while Cacc'e Mitte of Lucera, near Foggia, was appreciated for its bright cherry red color. In the Apulian countryside, wine considered of good quality is still called *mjere* from the Latin word *merum*, meaning frank or straightforward.

Perhaps the most well known and appreciated red wine is Primitivo, a wine that matures very early and can typically be used both as a meal wine and for blending. The more it ages, the more structured it becomes, developing rounder and more widespread aromas.

During the two wars, this wine was sold in large quantities to improve wines from Bourgogne and give them structure and color.

The ever-debated southern Italian issue, analyzed by political researchers, sociologists, philosophers and historians, always seems to point a finger towards bad State policies, and often towards a State that is absent because of its backwardness. But even in the south there were noticeable developments and changes. The Cantina Sociale Cooperativa of Locorotondo began in 1932, followed in 1935 by Copertino, in the province of Lecce. The famous Rosato del Salento was presented, advertised and sold on tap and in bottles as of 1937. This led the cooperative to intensify red wine production restructuring the vineyards with traditional varieties, such as Negro Amaro and Malvasia Nera.

The first programs for the defense of the vine, the quality of the vineyard and the respecting of wine-making calendars, became active in the 1930s. Leone de Castris began bottling a typical rosé wine in 1932 and Rivera – with the De Corato brothers – were pioneers in the development of the wines of the Castel del Monte area. The Cantina Sociale of Locorotondo was the first to interrupt the northern producers' monopoly of vermouth.

Even in Calabria, far from advanced in the 1930s, counting high levels of poverty, there were some wine makers fighting for maintaining Cirò wines alive. Among them were the Librandi brothers, who modernized the vineyards and worked the grapes in a small but perfectly functioning firm.

In the early 1930s, Campania, with its 4,300,000 yearly hectoliters produced, was as blooming a region as Apulia. However, the production methods were antiquated and rudimentary, even though the Oenologic School of Avellino, where Francesco Carpentieri taught, made noticeable efforts to change and modernize oenologic techniques.

Carpentieri felt the importance of the raw materials from a scientific point of view. He wrote, “First of all we must study the grape, because in every industry it is necessary to know the raw material and the requirements it must answer to in order to result in the final product we wish to obtain”.

His studies weren't limited to the knowledge of the composition of grapes and wines, but also concerned the tannic substances and the methods with which they were determined. He studied wine clarification systems with *terra di Spagna*, which he applied, establishing its use. Finally, he researched the causes that influence the ripening of the grape and the final composition of the wine.

Giuseppe Paris was another important oenologist from the Avellino school, and demonstrated the presence of sucrose in grape must, as well as contributing to the known biochemical effects of alcoholic fermentation. The newly developed technique of sweet filtered musts, better known as *lambiccati*, was aimed at increasing the low sugar level of the wines from Campania. At the time, these wines were in great demand and, since the

local production wasn't sufficient, they were produced in Apulia as well, especially in the province of Barletta, before they began to spread just about everywhere.

This product, which unfortunately wasn't always well made, since it usually wasn't prepared with good quality grapes, was made by halting must fermentation at the right point, followed by many filterings and centrifuges, making the taste of this very dry wine more agreeable. The sweet filtered method, which may be used both for white and red wines, is still used today by vermouth and sparkling wine producers.

Acidity correction was studied by Moio, Spagna, Musso and Addeo, who developed the so-called *gessatura* method, consisting in adding chalk powder on the *cappello* to raise the fixed acidity. Color correction, for increasing intensifying red wines, was obtained by using darker grapes, known as *uve tintorie*, such as the Tintore variety, as an example. Between 1931 and 1940, wine consumption went down from 120 liters per person of the early century to 88.2 liters, and the cost of a flask of wine half way through the decade ranged from 5 to 10 liras according to the quality. To give a relative value to the wine, we must take into consideration that the 'ideal' of the time was "if I could only have a thousand liras a month", as sung in a famous hit from the time. A good quality bread at the time cost 2 or 3 liras a kilo. In 1935, the lira's purchasing powers had increased from an equivalent of 1,150 euros from the beginning of the decade to 1,400, but in 1940 it dropped below 1,000 euros. As a result, even wine consumption went down, in favor of beer and cider.

Early in the century, Friuli-Venezia Giulia (still divided in two separate regions) had become poor, especially after the end of the Austro-Hungarian empire, the greatest consumer of its products. Tocai continued to be produced there, with its more intense color and glints of light green, produced in quantities of over 100,000 hectoliters in the Grave area. The main center for Friuli wines was Cormons, with its 800 hectares of surrounding vineyards. The most well known firm of the region was and is still Angoris, cultivating vines for centuries over approximately 600 hectares of land.

In the areas around Verona, the first consortium of typical wines from the Valpolicella, founded in 1925, moved forward with lots of difficulties, mainly due to the imperfections caused by the law of 1930. On the other hand, Recioto was spreading greatly. A sweet, rounded wine, with an alcoholic level of over 15% and a low acidity level varying between 4.35 and 5.70 grams/liter, it exists in sweet, agreeable and sparkling varieties. The dry type, called Amarone, is produced with the same grapes as the Recioto, but processed differently. Its circulation is owed mainly to Casa Bertani, and later to Bolla, who still today have some old bottles in their cellars demonstrating the exceptional long preservation of the wine.

At the time, the best known wine from the Veneto was without any doubt Bardolino, appreciated for its liveliness, lightness and freshness and the simple pleasure of drinking it, even though for a long time it was sold as an inferior quality wine with very different characteristics from those it was supposed to have.

The period of the Second World War was certainly one of the most difficult periods. Wine consumption decreased under 75 liters per person and in many areas wine

production was reduced or abandoned for lack of manpower or because of damages from the war. This lasted until 1945, a great year especially for Piedmontese wines, and northern wines in general, followed by a fantastic 1947 vintage.

During the war, wine was rationed and wasn't easy to obtain in the cities by those without a Fascist card. Most of the wine went to Italian and German armed forces.

The post-World War II period marked a number of renewals: the ICE – Foreign Commerce Institute – started up again, in order to promote Italian products and productive potential abroad through advertisement and the management of Italian participation at foreign expos.

April 25, 1947, marked the birth of the national expo of Pramaggiore wines to spread the knowledge of Italian wines, which still exists today. The area of Pramaggiore was made up of 700 hectares of vines, producing Tocai grapes, considered of great quality, which later became DOC.

In a study lead by Prof. Italo Cosmo, who succeeded Giovanni Dalmasso at the Conegliano Experimental Station in 1949, it was determined that cultivation of Tocai, Verdisio, Prosecco, Bianchetta, Riesling Italico, Pinot blanc, Malvasia, Traminer and Sauvignon blanc were continuing to increase in the area, while plantations of red wines such as Marzemino, Cabernet Franc, Merlot and Barbera remained insufficient, leaving almost the entire area along the river Piave to Raboso.

However, the area still produced Clinton, Seibel and Baco, grapes obtained by crossing *vitis vinifera* with other grapes, producing wines that were very resistant to diseases and appreciated by consumers, even though, as is the case today, they weren't allowed on the market.

In 1946, oenotechnician Giuseppe Asnaghi reactivated the Society of Italian Oenotechnicians, of which Antonio Carpenè became president in 1959. In the area of Treviso, property division was common and the vineyards used were not of good quality. Out of 600,000 hectoliters of wine produced, over a fourth was made from hybrids, 90,000 from Raboso veronese, and 80,000 from Raboso del Piave. With the exception of a few producers, most of the methods in place were archaic and this reflected on the quality of the wine.

Fertilizing happened every three or four years with manure lugged by manpower and every cellar had its own type of yeast. Vintages lasted until mid-October for Prosecco and November for Cartizze. Grapes were pressed by foot, except for certain cellars that had pressers on wooden rollers. Demijohns were the most common containers at the time, and the few bottles produced always contained sediment at the bottom, a sign of the product's genuineness.

In order to promote Italian oenology, in 1949 the Accademia Italiana della vite e del vino [Italian Academy of the Vine and Wine] was founded, with the goal of promoting scientific and cultural development of the sector. It was approved by the President of the Republic Luigi Einaudi.

This organization was ran by Giovanni Dalmasso until 1970, followed by Prof. Pier Giovanni Garoglio.

The next decade was dedicated to the rebuilding of the country, devastated by the war. Also thanks to strong wills, economic development grew considerably. The State began to renovate the productive system, but the greatest obstacle were the constant government overturns and battles between the parties.

A third of the vineyards in the Collio area and all those in Istria, Dalmatia and some in Venezia Giulia, were destroyed during the war. It wasn't until 1954 that a small portion of these lands – 'A' zones – were returned to Italy. But most producers lost everything. Ministers of Agriculture weren't selected for their abilities in the sector, but according to the political currents and divisions of power, problems that have never been solved. Government crises create uncertainty and instability and as soon as a ministry begins to function, rapid changes obliterate preceding work.

The Italian Wine Union, run by Salvatore Migliorini from 1956 to 1976 was almost miraculous in surviving a disastrous financial situation, together with its collaborators, and blooming up again, consolidating its structures and creating new ones. Together with the Italian Wine Union, other associations, such as Federvini, several consortiums and Chambers of Commerce pushed towards reconstruction, giving new life to the countryside, rebuilding the cellars and introducing new expensive machinery. The result obtained by *riraspatto* musts was to produce wines with higher alcoholic level and fixed level of acidity, smoother, with a lower level of tannins. In the meanwhile, the number of oeno-technicians grew to almost a thousand.

During this period, wine culture still practically didn't exist, and wine was not chosen according to its specific characteristics or its adaptability to certain foods.

In 1958, the Confraternita della Vite e del Vino [Brotherhood of the Vine and Wine] was created in Trento, presided over by Vittorio Zanon, which included, among its sixteen founders, Bruno Lunelli, who ran Casa Ferrari, with the goal of promoting wines from Trentino, commonly confused with those of Alto Adige, and not only sparkling wines.

There was a lot of unrest during the period, after Nino Folonari created the largest wine bottling factory in Brescia, advertised on billboards as “your daily wine”. The wine, produced in large sterilized glass bottles with crown corks, was simple, honest, cheap and, most of all, hygienically safe. The metallic cork and the wine's pasteurization were not perceived well. The methods of pasteurization devised at the time were many, but all consisted of heating the wine up to 50-75° Celsius, with no air contact, thereby avoiding re-fermentation and the wine turning into vinegar. However, the risk to be avoided was for the taste to change, releasing scents of cooked wine.

Early in 1951, the township of Milan lowered taxes on fine wines from 6,750 liras/hectoliter to 3,000, and 1,800 for common wine. It was an important step in the long history of duty abolition, which was then obstructed by politicians, among which Andreotti, and which was concluded only in 1962.

In 1951, vines were cultivated over 3,900,000 hectares of Italian land, of which only 1 million with specialized cultivations. 500 million hours were used with salaries amounting to 200 billion liras, approximately 4,000 billion of today.

The exportation of 1,300,000 hectoliters was growing considerably if we think that in 1946 only 320,000 hectoliters were exported, and 610,000 in 1948. The contribution of the sector towards taxes represented 90 billion.

A new factor in the wine industry was the development of plant nurseries, estimated at 2,100 over an area of 1,837 hectares, with over 63 million graftings.

The first market researches began in 1952. Doxa researches determined that wine consumption was in decline, contrary to what was declared by several members of parliament. It is interesting to read Doxa's conclusions, that men drink 'non baptized' wine with water, while almost all women do this. Wine consumption was low among professionals and employees, remaining high among farmers and workers. Wine outside of meals was declining rapidly. According to ISTAT data, average wine consumption for the whole decade remained at 99.8 liters per person. It is certain that most of the population, about half, was not aware of wine types, varieties, or areas of production.

1956 marked an abundant vintage, producing 64 million hectoliters of wine, 5 more than the previous year. Exportation grew beyond 2 million hectoliters. The most productive region was Apulia with over 12 million hectoliters, followed closely by Sicily and Piedmont, which hadn't yet witnessed the exodus of rural inhabitants towards the cities. However, the 1957 vintage was one of the worst and only produced 42,548,000 hectoliters, less than 30% of the previous year.

Wine exportation were clearly successful, with sales equivalent to 20 billion liras, 28 if one includes vermouth, aromatic wines and aperitifs. 13 million bottles of Moscato d'Asti were exported.

Over the decade, the issue of designation of origin was frequently raised and legislation for the establishment of protection regulation was called for. However, it wasn't until 1963 that law 930 was repealed and another three years went by after that before the first DOC – Vernaccia di San Gimignano – was recognized.

In the early 1960s there began to be talk of an economic boom for Italy, and the number of social cellars grew to 315, with a total production of approximately 8 million hectoliters. Unfortunately, these cellars, which guaranteed certain work to their producers, not always produced quality wines, due to the often lacking grape selection.

Italy's politics of the period were leaning towards the opening and liberalizing of the markets, and in favor of expanding wine production. Prof. Italo Cosmo, during a meeting at the Verona expo in 1967, proposed that “the Italian wine production in the community circle should focus on two directives: first of all the quality, with implantations in hilly areas, followed by government protection and inspection. Also: the possibility of resorting to adding sugar, within certain limits; free practice of blending, with the exception of specific regulation; lastly, using the not-excellent over-production for distillation”.

This statement helps us to understand what was happening during those years, marked by difficult vintages, like the one in 1963 in northern Italy, where the alcoholic level was low.

The 1960s are known as the years of the Italian economic miracle and industrial development. This was an important period for the wine industry as well, marked by the creation of the wine designation of origin structure. This finally equipped Italy with a legislative system able to defend its products and guarantee an image of quality for its national and international markets. For the market economy, DOCs were a very positive factor, sending out an image of trust in the product which was certified after its production locations, the producer, and the production methods were checked. Of course, the restrictions brought by the new laws and regulations also raised production costs, which could be met by the consumer, since they offered guarantees and trust in the purchased product, potentially offering the possibility of attracting a larger share of the market.

Legislation had a fundamental effect in Italy when the first regulation of the wine sector was created in 1970, applying the terms set in the Treatise of Rome in 1957, thereby allowing Italy to participate at the agreement that established VQPRD wines (Quality Wines Produced in Limited Regions). The agreement consisted in a compromise between the Mediterranean countries - with an area of origin related certification system - and the Germanic countries – which bestow certification on the final product according to the quality obtained.

The lateness of this regulation put Italy in an inferior position to French producers. Finally, in 1966, the first ten DOC wines were nominated (Vernaccia di San Gimignano, Est!Est!!Est!!!, Ischia Bianco and Rosso, Frascati, Brunello di Montalcino, Bianco di Pitigliano, Barbaresco, Barolo, Trebbiano, Sangiovese, Merlot di Aprilia, Vino Nobile di Montepulciano), followed by other 21 in 1967 and 23 in 1968.

The legislation of 1963 established three categories: Dos – Denominazione di origine semplice [Simple Designation of Origin], Doc – Denominazione di origine controllata [Controlled Designation of Origin] and Docg – Denominazione di origine controllata e garantita [Controlled Designation of Origin Guaranteed]. DOS requirements were to indicate the name of the geographic area of production, alone or along with the name of a variety used. However, this designation wasn't well accepted and soon disappeared, being substituted later by IGT – Indicazione geografica tipica [Typical Geographic Indication].

DOCGs remained suspended until the 1980s, waiting for legislative approvals, while DOCs, of which the acronym was rapidly accepted by the market, was interpreted as an indication of high quality products and began to spread quickly.

DOC and especially DOCG legislation in Italy is one of the strictest in the world and is based on four quality levels. DOCGs, in particular, have very precise regulations based on the following criteria:

- Wine/hectare ratio
- Productivity

- Permitted varieties and blends
- Indication of the year of the vintage
- Minimum length of ripening and aging
- Occasionally the indication of materials allowed for aging
- Minimum alcohol level
- Every batch of wine of every vintage year must undergo inspection by a tasting commission which judges it according to color, fragrance and taste. Those wines that don't correspond to these characteristics of quality are downgraded and sold as “table wine”.

Many producers early on weren't convinced of the usefulness of the DOC, because of the bother of having to enlist in a guild, filling out the report, respecting production regulations and submitting to external inspections. Also, many wines were made from grapes picked in different regions from those where they were bottled and couldn't qualify as DOCs, and just like today, many great wines bore invented names and were produced by blending several different varieties of grapes.

During this decade, the Italian Academy of the Vine and Wine became more and more important, through the publication of many scientific papers, while on the field, oenologists created new wines more suitable to the taste of the consumers. Wine sales during this period moved from a small commerce to a market economy. New production technologies adapted to the market demand and the rising urbanization that was reducing the number of citizens dedicated to agriculture.

The rise of Brunello began between 1965 and 1970, with the investment in new technologies and productive structures. Over the 1963-68 period, Italy produced approximately 68 million hectoliters of wine, representing a fourth of world-wide production. Exportations continued to grow from a value of 30 billion liras in 1965 to 34 in 1967.

The 1970s were years of change, and the era of wine of the masses was coming to an end. The “wine war” between France and Italy took place, with riots involving the police and the destruction of wine tanks in southern France. But Italian wine, especially Sicilian and Apulian, continued to be sold as indispensable products to improve or substitute others of lower quality, since the wines that had previously been coming from northern Africa were decreasing or disappearing after the independence of Algeria, Tunisia and Morocco.

Giovanni Marcora, the Minister of Agriculture between 1974 and 1980 – a rarely long period – demonstrated great ability and wisdom. Italy presented its requests in Luxembourg: the immediate re-establishment of free wine circulation, as decreed by the EEC in 1970 and a compensation for the damages to the exporters. Also, he asked for regulation in the development of wine-making, with guarantees of equal respect for other agricultural productions, without heavy impositions to the producers.

During the 1970s and '80s, beer began to compete more with wine, with its 8 million hectoliters produced, while the demand for wine in Italy went down to 65 million

hectoliters in 1977, in any case beating France, stuck at 53 million hectoliters. The 1970s marked a great expansion for Italian wine production. Exportation grew over all the international markets, especially in the United States. These were the years of great vineyard implanting programs and strong investments in fermentation and production equipment, as well as bottling assembly lines. Better equipped cellars were created, following the Californian example, and the sale system began to move from agricultural to industrial marketing, better organized and more rational. These changes and progress lasted through the mid-80s when scandals stopped the expansion short, which lasted many years, following the economic crisis of the western world.

During the decade, together with the trends of *chambrier* and extolling wines, the main debate was whether technology must be favored over tradition. Since red wines could be used also to obtain white wines, particularly sparkling or rosé, by fermenting them in white, this brought to a different production method for white wines, abandoning the archaic processes.

Ezio Rivella of the Association of Italian Oenotechnicians wrote about this: “The experience relative to the processing of the most valuable white wines, Champagne, wines of Reno and Mosella, Asti, etc., has taught us that to obtain superlative qualities it is necessary to press as little as possible and select only the first fractions of the must (about half the weight of the grapes) setting aside the rest. Not only does the first must contain the highest sugar level, but when the pressure is higher, the result will include what is contained in the peels: tannins, coloring pigments, organic acids, glycosides and other extractive substances, which confer to the product a less refined taste”.

The traditional fermentation system of white wines in contact with the peels for two or three days produced wines with a more intense taste, however with a stronger taste of pomace, that require less ripening and are therefore ready to drink sooner, but are less healthy, less fruity, more difficult to keep, in other words less refined.

On the other hand, fermentation must be different for red wines, since the coloring matter and the cellular contents of the peel, such as the anthocyanins and tannins, are indispensable. All these substances combined supply the typical characteristics of a wine. These new researches brought new fermentation methods, such as the use of steel tanks with temperature control systems and ripening phases, fermenters to automatically extract solid parts from the fermentation container, self-washing filters and refrigerating equipment resulting in more aromatic, full bodied and fruity white wines.

This period also marked wine's internationalization, with foreigners buying land and investing in Italy, and Italian producers going to the United States, as was the case of Zonin. Wine distribution began to change with the arrival of wine shops and fashionable French varieties, such as Cabernet Sauvignon and Chardonnay spreading rapidly across the country. Incrocio Manzoni 6.0.13, a cross of Riesling and Pinot blanc, came from Conegliano's Scuola di viticoltura e di enologia [School of Wine-making and Oenology], and spread particularly in the areas around Treviso. The number of recognized DOCs reached 108.

Influential voices, led by Luigi Veronelli, fought for the creation of specific territorial definitions for where wine is produced, the equivalent of the French *cru*. A number of producers began to market their highest quality wines with specific denominations: Gaja with Sori, others with Bricco, Rocche, etc.

Advertisement in general and television commercials in particular were still not widespread enough to promote wine, and were used mainly for light aperitifs and brandy. In 1974, producers spent 12 billion liras for television and radio advertisement, of which almost 8 billion on hard liquor and approximately 4 billion for liquor.

During these years, the wine industry found itself under pressure as a result of the many frauds that were discovered and of the falsification scandal that had taken place in Bordeaux in 1970. The main frauds had to do with sugar addition in order to increase the alcohol level, false data on wine labels, and generic wines sold as quality wines.

Around the mid-1970s, Social Cellars, in less than 25 years, had reached a considerable importance in the production field. From 4 million hectoliters of wine produced in 1952, they reached 35 million, representing 40% of the national production and counted 700 cellars and over 250,000 members.

In 1988, thanks to Elisabetta Tognana, the national association 'Le Donne del Vino' [The Women of Wine] was founded. This was a new phenomenon, since the sector had always been dominated by the male sex. In the past, vineyard and cellar properties went from father to son, and if the heir was a woman, it was taken care of by her husband. During the last decades, a number of important wine businesses have been inherited by wives and daughters, who have run them brilliantly and wisely. Today, there are many female agronomists, wine shop keepers, oenologists and sommeliers. Most of them represent small businesses, but their numbers are rising and this is beyond any doubt an important dynamic aspect of the sector.

Up until then, wine producers in Italy mainly had a family approach to the business, but soon multinational companies and large industrial enterprises began to look into the wine industry. The dominant opinion during those years was that family-run industries couldn't be competitive and were doomed to fail. Many cried scandal when typically Italian industries were colonized (for example pasta, mineral water, aperitifs and liquors), while others thought that large companies could make better investments and increase profits and favor innovation.

International varieties, in particular from France, continued to circulate just about everywhere and were produced together with local grapes. Campania was perhaps the only region to remain faithful to the traditional local varieties. International markets, especially from the English-speaking countries, required an always higher quality level of wines, and production tried to answer this demand by producing not only better wines, but also searching for new tastes. Many areas intensified production of international wines, that began to circulate also in classic areas, such as Tuscany and Piedmont.

In 1981, 7,137,000 hectoliters of DOC wines were produced out of a national production of 70,500,000 hectoliters, followed the next year by 9.2 million hectoliters out of a total production of 72.5 million. This meant that the number of producers becoming DOC was rising, while at the same time many producers released alternative products to satisfy the demand for something new, as well as supplying more specific and specialized products better tailored to the consumer. Local varieties were therefore joined by a production of typical wines labeled with the variety, as well as by more or less traditional wines based on classic varieties of the area, blended with other international grapes. These precious innovative wines lent market value to the Italian image and production, creating a large selection of quality wines at a great value.

In 1981, only 15 DOCs were producing over 100 thousand hectoliters/year, led by Chianti with 1,240,000 hectoliters, Soave's 423,000, Moscato d'Asti's 354,000, followed by Valpolicella, Lago di Caldaro, Montepulciano d'Abruzzo, Marsala, Lambrusco Reggiano, Frascati, Nuragus di Cagliari, Bardolino, Valdadige Rosso, Verdicchio dei Castelli di Jesi, Orvieto and Barbera d'Asti.

Many important wines were producing under 50,000 hectoliters. Among these were Barolo (46,700), Brunello di Montalcino (28,350), and Barbaresco (20,700). Torgiano was growing rapidly at 18,000 hectoliters.

There were also small productions, such as Bramaterra, with its 32 hectoliters, and Cinqueterre Sciacchetra producing 23. There were also some aberrations, since certain officially recognized DOCs didn't actually exist on the market, raising questions about why the designation had been requested and why it had been approved. Also, the number of DOCs was uncertain, since there existed two different interpretations: one based on the geographic name, for instance Oltrepò Pavese, while the second was divided among types, such as white, red, rosé, Cabernet. This lack of clarity was obvious in the official documents that identify the same product as *la DOC* (singular) in some places and *le DOC* (plural) in others. This is without counting the fact that frequently the description of the production areas was far from comprehensible.

The last year of the decade was marked by poor vintages that yielded 60,325,000 hectoliters, followed by the terrible weather conditions of 1990 which lowered production to 54,927,000 hectoliters.

The decade also marked the development of new tendencies and situations: the price of prestigious wines grew rapidly; producers such as Maurizio Zanella began using both local and international grapes, creating *auteur* wines; in Sicily, Casa Corvo – Duca di Salaparuta, a company with great potential which had previously only focused on quantity over quality, began to focus on local grapes to produce high quality wines such as Bianca di Valguarnera and Duca Enrico, opening new paths to Sicilian wine.

A new phenomenon of the decade was the success of Novelli wines, liked for their young, fresh and fragrant character with well accentuated aromas. In 1988, 50,000 hectoliters of Novello were produced, equal to 7,270,000 bottles. Bardolino became the first Novello DOC. Tuscany produced 36% of Novello, followed by Veneto at 23% and Piedmont at 10%.

In 1984, EEC regulations determined that the contents of a bottle must be 750 milliliters and no longer 720 as was the case until then. Labels changed style and began following regulations determined by the law, requiring more disclosure of information, such as the area of production, alcohol content, etc. Apart from the standard bottle models *bordolese*, *bourguignonne*, *renana* and *champagnotta*, new types began to be made, designed by stylists and marketing centers. The weight of the bottles went up, the colors darkened even for white wines, the neck became longer, and consequently corks did the same. Bottles became more elegant, but production costs went up as a result even up to 10% of the cost of the wine, and sometimes beyond that.

In 1989 Italy produced over one billion eight hundred thousand bottles for wine, of which one billion was meant for the national market and the rest was exported. Avir, the group made up of 19 of the major glass producers, patented a special glass bottle capable of absorbing those ultraviolet rays that have a negative effect on the wine.

Unfortunately, this period also marked the rise of frauds and adulterations, such as methanol, with damaging results on all production and exportation. The public opinion and newspapers asked for higher inspection levels and heavier sentences for those guilty of fraud, but according to what was written in the magazine *Largo Consumo*, “in Italy there exist 145 official labs of the public administration dedicated to food inspection. This is a higher number than those existing in France and Germany combined. However, the number of labs is inversely proportional to efficiency ... the Nuclei Antisofisticazione (NAS) and the Drappelle Antisofisticazione of the Guardia di Finanza have repressive duties. Italy is the only country that delegates the execution of administrative duties of this sector to the military: the Istituto Superiore di Sanità is charged with verifying the samples supplied by peripheral organizations. It is an overshadowing array of organizations and personnel, two ministries involved directly, others indirectly, in addition to the regional governments and the police force, for a total of approximately 1400 inspecting officers. The structure is complex, but its efficiency is doubtful”. All this expenditure of energy resulted in an inspection every 800 inhabitants, while the EEC average was one every 250 inhabitants.

As previously stated, wine marketing became more and more an important aspect and labels were improved to attract the attention of the consumer, often using drawings by famous artists. However, the Italian consumer of the early 1990s still drank lots of tap wine, since bottled wine was considered too expensive. Wine consumption stayed high at 62 liters per person in 1995, which went down to 59 in 1997. It is often forgotten that wine is not a prime necessity and is not indispensable for survival, so wine production depends upon the laws of the market.

Studies and research on environment adaptability intensified, and many institutions dedicated themselves to researching more suitable clones for obtaining optimal oenological characteristics, meeting the demand of the market while offering a good resistance to diseases. Breeding developed and over a small number of years became the most advanced in the world.

Bologna's institute for arboreal cultivations is the most advanced in studies on mechanized grape-picking with machines that carry out the work very quickly and able to select and pick only the ripe bunches.

The decade marked the rising trend of barriques, small new wooden 225 liter casks that offered the advantage of ripening the wines faster, allowing them to be placed on the market after very few months and no later than a year. Wines produced in this fashion are rounder, with scents of vanilla and sessile oak, but naturally this method raises production costs and this aging method is not suitable for all types, especially not recommended for bringing an average quality wine to excellence. Barrique wines must have their own structure, because otherwise it gets more damaged than enhanced. Also, if the use of barriques is exaggerated, the taste of wood tends to prevail over the grape. What is certain is that wines elaborated in barriques, whether white or red, are more complex and differ from those produced before.

In 1992, law 164 tried to fill in the gaps of law 930 of 1963, the basis of the constitution of DOCs.

Within the EEC, in 1995 Italy was accused of excessive wine production. Actually, Italy produced as much as France (55,702,000 hectoliters), but the long war between France and Italy caused several damages to the economy and to the images of both countries. Vineyards kept growing smaller and went from 1,397,000 hectares in 1977 producing 64,072,000 hectoliters to 1,073,000 hectares in 1986 producing 60,226,000 hectoliters to 922,000 hectares in 1996 producing 58,773,000 hectoliters. The constant decline in production and consumption was counterbalanced by a constant increase in quality, due to several important aspects: the abandonment of unclaimed areas and the advent of specialized vineyards; technological progress changed the methods in designing vineyards, a process that began to be carried out by lasers; cellars were run by computers and mechanization of agriculture was widespread by then. The result can be seen in the finished product, which was clear, fresh, with intense and concentrated body, more harmonious, balanced and lasting. This can be preferred or not, but what is certain is that wines today rarely present biological, chemical or physical defects and are produced under healthy hygienic conditions. Cleaner cellars have taken the place of squalid ones, filled with mold and bad smells. Stainless steel has substituted reinforced concrete vats, even though lately they have come back in to use, albeit noticeably modified. The same goes for wooden containers, both large casks and barriques. Modern rational cellars are equipped with a certain level of automation to help control the wine making processes, especially the ones that influence the quality.

Up until the 1960s, chemical solutions were used to enhance the quality of the wine, while today these have been substituted especially by physical treatments, such as filtering, centrifuging, and heat and cold treatment. Fermentation has a preponderant role within the modern wine production technique, even though we mustn't forget that the first step towards a good wine is healthy high quality grapes, picked at the right moment. The vintage and the transportation of the grapes from the vineyard to the cellar takes much less thanks to machinery, and this also allows the wine's quality to rise, since it reduces the risk of the grape juice becoming oxidized.

In the past, sulfur dioxide was used massively, while today, use of SO₂ during the fermentation phase has almost completely disappeared, thanks to hygiene systems in the containers and better temperature control. The style of wine production has changed in order to obtain suppler wines that aren't too tannic or corpulent and are more balanced.

The wine's aging in the bottle is fundamental and is used more and more to enhance the bouquet. Many producers leave the wine in bottles from 6 months to a year, and some even longer, before putting it on the market, which enhances the fragrances. Strangely, DOC and DOCG regulations rarely mention an obligatory aging time in the bottle.

During these last years, the quality of Italian wines has risen a lot, a number of defects have disappeared, but there is also the risk of moving from a type of oenology that used to privilege the valorization of the grape to one that becomes banal, producing products with similar characteristics, without defects, but also without typicality and character. The characteristics that used to identify a wine, due to a number of factors such as the soil, the variety and the climate (what the French call *terroir*) are also disappearing. This is a cultural problem, due to a market that wasn't ripe enough until recently, but that is now evolving with a more exacting demand for higher quality and more easily identifiable products with specific characteristics.

Marketing studies today suggest that producers should maintain the most constant quality standard possible, year after year. It is because of this that chemical and physical procedures are applied; common examples are the use of concentration by reverse osmosis, refinement and filtering, which tend to standardize the final product, impoverishing the extracts and the aromatic substances. Sometimes it is easy to forget that wine is alive and linked to the conditions imposed by nature.

Today we see an array of extremely high quality products, very expensive and with a distribution targeted at a limited top-tier clientèle, that produce a lot of talk and coverage, but only marginally interest actual consumption, even though they are doubtlessly very important for the producer's image, for whom they represent a display window of his products, that usually include other quality wines at more affordable prices for the average consumer. From a quality standpoint, great Italian wines are at the same level of the best products world-wide and the number of excellent producers and products grow every year.

Italian vineyards represent 10% of the cultivated vineyards of the world, extending over 1.1 million hectares, producing an average of 70 million hectoliters and supplying 25% of the world's production. What is even more important is that quality wine production in relation to total production is growing constantly and is now valued at 15-20%.

What is often written about the wine world, especially outside of its closely linked circles, demonstrates an obvious lack of knowledge and a grasp of the fact that this is an important national economical activity that – alongside a number of other sectors – contributes positively to the image of the country.

In Italy there has always existed a quantity-oriented low-cost production, but the future aims at high quality products, while those that don't express appreciable qualities become more and more marginal.

The image of Italian wine, even if considerably risen in stature over time, still remains behind French products, for example. Quality is a complex factor also based upon the expectation determined by communication elements and the presentation of the product such as advertisement, public relations, promotions and packaging, that create an image of the product in the consumer's mind. The image is therefore a fundamental element in the perception of the product. The real or tangible quality is influenced by it, but must also be present and constant, otherwise it will wear off the efforts of communication.

Italian laws and regulations aren't inferior to those of other countries, and are often more detailed. However, since serious and methodical inspections aren't carried out regularly at high standards, this allows DOC and VQPRD producers to sell medium-low quality wine at high prices, damaging those who produce high quality wine.

Another problem with Italian wine production is that it is often quite divided. Top-notch producers are usually not large enough to be able to afford the great investments needed to create a recognizable brand image at the national or international level. Obtaining an appropriate size by grouping together producers as well as a better organized system in general, would allow companies to invest in research and development in a market that is becoming more and more sophisticated and demanding of better quality products, which would expose them and place them in a better position on the market.

Quality products are rising in numbers and this is possible by the acquisition of other companies and the establishment of consortiums and associations. There also exists the possibility of creating cooperatives, but until now this solution has shown very few positive results in the production of high quality wines.

Consortiums are more suitable for building an image, creating common quality brands, organizing international distribution and respecting the single identities of the participating companies.

In Italy there are 770,000 registered wine production companies. Among these, two thirds cultivate less than a hectare of land, 7,000 more than 10 hectares and only a few hundred can boast more than 50 hectares of vineyards. The average size is 2.15 hectares for DOC and DOCG producers and 0.64 hectares for IGT and common wine producers.

Production has stabilized itself at around 46 million hectoliters, but consumption in Italy has gone down lately and continues to fall, although at a slower pace than in the past (see Fig. 1,2,3,4,5,6,7,8). Today, the Italian consumer tries to reduce expenses, cutting costs and preferring cheaper products, thus modifying purchasing models. This demonstrates

that even the food sector – considered relatively rigid – is becoming more and more elastic.

According to a recent ISTAT survey, wine consumers in Italy are 53.3% of the population, compared to 54% in 2009 and 57.6% in 2005, while people who consume it daily are approximately 24%. This tendency at lowering consumption is not unique to Italy, but is common among all European countries with an important wine production, such as France (66 to 53 liters per person over the last 20 years) or Spain (now under 30 liters per person).

Several factors have led to this, among which new dietary habits, life-styles and work-styles, as well as tougher laws on the use of alcoholic beverages.

Compared to the past, for instance, more hours of the day are lived outside of the house with more attention to work time and performance, all factors that contribute to marginalize wine consumption.

Also, today there is more attention towards the quality of the wine, making consumption of table wine less obvious. It is more common to search for specific characteristics linked to the taste and the choice of the bottle, changing the behaviors of the consumer towards wine.

Many producers have had to sell good quality wines at production cost, often even DOCs, in order to make room for new batches.

The reason for this can be traced back to the market and the evolution in the habits of the consumers.

Considering today's demand, there is doubtlessly a case of over-production. During the last years, new wine companies were born over the whole Italian territory. Many produce average quality wines, a small number have or are in the process of reaching excellent levels, but unfortunately most are badly managed and aimed at profit while not concentrating on the quality of the wine, resulting in great quantities of unsold wine.

Italian wine producers have often remained tied to old communication strategies, with unfavorable cost/earning ratios. Brand promotion is often entrusted to fairs and tasting sessions that cost a lot and only attract a number of interested people and not that many buyers. Another path is traditional promotion, through billboards, specialized magazine ads, and television commercials that can reach a higher number of people, but at very high costs and with a limited impact.

Frequently, the message doesn't hold into account the tendencies of the consumer, who doesn't feel attracted by or involved in the selection of the product.

The market has changed a lot over the last twenty years, and today the consumer is more careful about what he buys. He looks out for quality, price and the geographic origin, and in some cases also environment sustainability, such as organic wines, but also seeks experiences, feelings, links to nature, people, the creativity of the producers. The important factor is to communicate all these values and involve the consumer, while interpreting the tendencies of the market.

Today, the tendency is to go towards wines that are less complex and more immediate, especially among the younger generation. Communication, education and explanation are

the paths to follow. Regarding this, there is an interesting project by the Unione Italiana Vini (UIV) in some test city schools to supply a direct experience in sensory analysis as an educational instrument, to stimulate awareness and competence among youths as a basis for a moderate, healthy and balanced relationship towards nutrition and drink, conveying the idea that moderation is not only the right behavior, but is also 'fashionable'.

During the last few years, the alcohol level in wine has gone up and consumption has gone down, also due to the increase in drinking awareness campaigns and alcohol test enforcement. Alcoholic levels have gone up not only because of changes in the climate, but also because of a tendency among producers to reduce vineyard yield and among guides to favor more powerful wines. Lately, however, more wines have been offered with a lower alcohol content, even below 10%. This trend was launched by American and Australian companies that want to convey the message that these wines have a low calorie count and are specifically aimed at women, young people and the occasional consumer. Producers in traditional wine-making countries seem skeptic towards these low-alcohol wines, since they are viewed as an example of loss of tradition, quality and preservation.

I believe that it would be appropriate to distinguish between beverages and wine. These products with a low alcoholic level derived from wine lack specific characteristics and can only satisfy the demand of a portion of consumers. However, for important and easily identifiable wines, the alcohol content is part of the balance and the sensory characteristics.

Today's consumer is always more careful about the quality of the wine he buys and the price he has to pay. That an expensive wine be a fine wine is no longer valid. There has yet to be an analysis of production costs for the different varieties and of the final market price of the products. An analysis is taking place among Chianti and Franciacorta wines.

Quality is a factor to be determined after the purchase, when the bottle is opened. This is a limitation, since in many cases DOC or DOCG designations are not necessarily indications of excellence, so there needs to be a distinction.

The path that companies should follow is to create a pre-sale perception of the product that orients the client to assimilate the product to a concept of quality.

In 2010, Italian wine exportation went up (Fig. 9, 10) especially towards Eastern markets, a sector that today has become nationally the most important for food and agriculture, making 4,080.6 million Euros, 11.8% higher than 2009. Due to the constant decrease in national consumption it is clear that strengthening exportation is the right direction for maintaining and obtaining an expansion of the sector.

One mustn't forget that the international market is complicated and not open to everyone, since each market is specific in its own way, and one must be known and able to find interested and capable importers.

The *Terroir* is the central element for DOCs and DOCGs, with the principle of interpreting and enhancing the potential of a territory, leaving a wide range of choice to the cellars. The choice to use a particular type of grape over another would be less important or even eliminated, underlining the vocation of a territory for the production of great wines.

Up until now, applications to the DOC or DOCG were presented at the Mipaaf (Ministry of Agricultural and Forest Policies) and examined by the National Wine Committee. With the new market organization of the wine sector (Ocm vino) this will become a task of the European Union that will be nominating a specific commission. The National Wine Committee will be able to offer counsel regarding the applications regularly presented prior to July 31, 2009, legal through December 31, 2011. This explains the many recent applications and requests for modifications.

As of 2012, the Mipaaf will only be able to make small changes, while the processes of recognizing new denominations or important variations in regulations will be sent to Brussels and no longer to Rome.

Giuseppe Martelli, president of the National Wine Committee has stated that “Today, out of the 320 applications presented, 25 concern the transition from DOC to DOCG, 45 are new DOC designations, and 9 are for IGT recognition. These are added to the modifications to pre-existing designations, 23 to DOCGs, 175 to DOCs and 46 to IGTs”.

The 175 modifications to DOC designations have mainly to do with an increase in the ampelographic base and the addition of new mono-varietal types, while the 46 IGT modifications regard mainly the geographic limits of the production areas.

In 2008, the OCM wine reform of the European Union established a single classification of quality products through DOP and IGP. The labels will continue to indicate traditional DOC, DOCG and IGT indications, with the possibility of indicating DOP or IGP as well. The goal of this reform is to simplify the sector, making it more competitive and internationally protected.

All over Europe, designations of origin are collective marks that identify a specific product, so it's up to the producers to safeguard its quality and image, developing their asset and defending it from those who wish to speculate on it.

DOP (Designation of Protected Origin) defines the name of a region, a specific place or, in certain cases, a town, that designates an agricultural or dietary product originating from that area, where the quality or characteristics of the product are essentially a result of its geographic conditions, including natural and human factors, and where the production, transformation and elaboration take place in the same area (Art. 2 of CE Regulation n. 510/06).

While DOCs and DOCGs have turned out to be very useful for Italian wine production, both economically and for the quality of the products, providing consumers with a guarantee, it is important that they be adjusted to development and modified when needed. A balance should be maintained between regulations, obligations, restrictions

and evolutionary changes. Regulations are basic instruments that cannot and must not remain static, since they are tied to productive and market factors that are dynamic. What is important is the result: producing good wine. It will be up to the market and the consumers to decide if the right choices were made.

Regulations that call for a number of parameters, limitations and inspections confer value to these products over not recognized ones, but these differences in price and quality must be communicated or understood by the consumers, otherwise they are pointless.

Policies of information and the organization, distribution and programming of efforts towards a planned result have frequently been lacking.

Over the last few years, climatic changes have had effects over wine production, due to the alternating of heavy rain seasons with periods of heat and droughts. Especially worrying is the rise in average temperatures, that results in fuller wines, more corpulent, but also higher in alcohol, sweeter, with a lower acidity level, turning out wines lacking in freshness and elegance. If we can't change the climate, the only solution is to move vineyards to cooler areas at a higher elevation, where the average temperature is lower.

Another consequence of global warming is that the grapes are picked sooner, even in early August, compared with the norm of mid-September vintages. The vine's cycle is now shorter and the resulting wines are less balanced. This is why many producers are moving their vineyards to higher altitudes, as is visible in Franciacorta, Trentino, and Alto Adige, where vines are planted above 800 meters, in Val d'Aosta where they are planted at 1,200 meters and even higher up in Sicily on Mount Etna. Sudden changes in temperature are more common at high altitudes and this affects aromas and the mineral levels, especially accentuated on volcanic soil.

Moving upwards isn't simple. New varieties must be created for them to adapt to the new environment, made resilient to diseases, in order to produce typical wines with pleasant aromas and tastes, without even considering other problems such as the management of water.

Since climate changes happen over very long cycles, with many uncertainties, it is difficult to foresee and anticipate a future production that is appropriate to these changes.

The market of the second decade of the millennium, especially in the final years, has been rather unpredictable and unstable as a result of the commercial war started by the United States, the unknown effects of Brexit and of the Corona Virus and the changes in wine production. The “natural” wine in a short time from a niche product surged to become a normal method of management of the vine.

The most significant event of the decade has been the success of the Prosecco that grew at a yearly rate of 16%, reaching a production of 464 million bottles.

In the last decade in Italy, the use of French grapes and techniques diminished considerably. Italian grapes, many of which were disappearing, were rediscovered and reintroduced in the production of new wines.

The improved confidence on Italian varieties helped produce more original wines with typical local characteristics. This together with the improvement and modern techniques in the cellar developed in the last three decades had a favourable effect on the quality of wines introduced into the market.

In 2017 the legal structure for the approval of the DOC/DOCG wines changed. European states were obliged by European Union laws to seek the approval of any new DOC/DOCG. This made the creation of any new Doc/DOCG wine more difficult, since it had to be approved by a commission in Brussels made by representatives of European member nations. Individual states are still allowed to make changes to the existing DOC/DOCG but not to create new ones. The result has been that between 2016 and 2017 there was a rush to obtain the Italian government approval for the new DOC/DOCG.

Now a days, materials that are perceived as new, very often are very traditional ones, such as clay, large wood casks, while others have been updated, like concrete that are used for fermentation and aging. These new/old procedures still surprise people that have been accustomed to see steel and barriques in wine production.

Wine is a living matter that has been kept in containers that always have some degree of porosity to allow the wine to breathe and consequently to evolve. For many years we have been accustomed to the use of small barrels, a method that has been used mainly in France to produce high quality wines, but sometimes without thinking and analyzing the most appropriate requirement of a wine to mature and express itself and considering the characteristics of the vineyard.

The improvement we now see is that the containers used are better suited to the type of grapes and the environment and less because of the success of other producers or of the fashion of the time.

In the last part of this decade, characteristics that were in high repute in previous decades, such as concentration, viscosity, powerful body and wood aromas have been replaced by the desire to have true natural character, typical characteristics and being able to recognize the wine, place of origin and quality, such as being well defined, elegant, balanced, complex, pleasant to drink.

Before the industrial revolution, human agriculture significantly contributed to the increase of species diversity across the world.

However, 20th century intensive farming has been directly responsible for biodiversity loss. The wine industry is not exempt from this; the creation of a monoculture in the vineyard, aided by the extensive application of synthetic pesticides, herbicides and fertilizers, was adopted by the majority of winegrowers.

Yet since the 1990s, the volume of synthetic chemicals used in viticulture has fallen dramatically. This is clearly a positive development, both in terms of environmental

protection and enhanced soil and vine health, although it does present growers with a new set of challenges.

Environmentally sensitive biological pest control methods are growing in importance. Encouraging a biodiverse vineyard environment, with a vibrant ecosystem of plants and animals is increasingly a priority for wine brands. Increasing biodiversity in the vineyard helps to increase the number of natural enemies of insects and other pests. The use of natural methods has also a side advantage of being less costly than the use of chemicals. Biodiversity helps to prevent soil compaction due to the emphasis on cover crops. This improves the organic substance and humus of the soil, its structure and its porosity. It also helps to push the roots of the plants down deeper into the soil in search of nutrients.

Recent studies uphold what we have long believed, that wines from regeneratively farmed, biodiverse vineyards yield fruit that is fresh, pleasant with purity of flavor, requirements consumers today are looking for.

The number of bio-wines in the market keep rising, and wines that are not rated as such, now use a minimal quantity of pesticides in comparison to twenty years ago. In the end it is the consumer, together with the media, that push producers to grow and sell healthy products from an environmentally sustainable agriculture. This is becoming the norm in this last decade.

Fig. 5

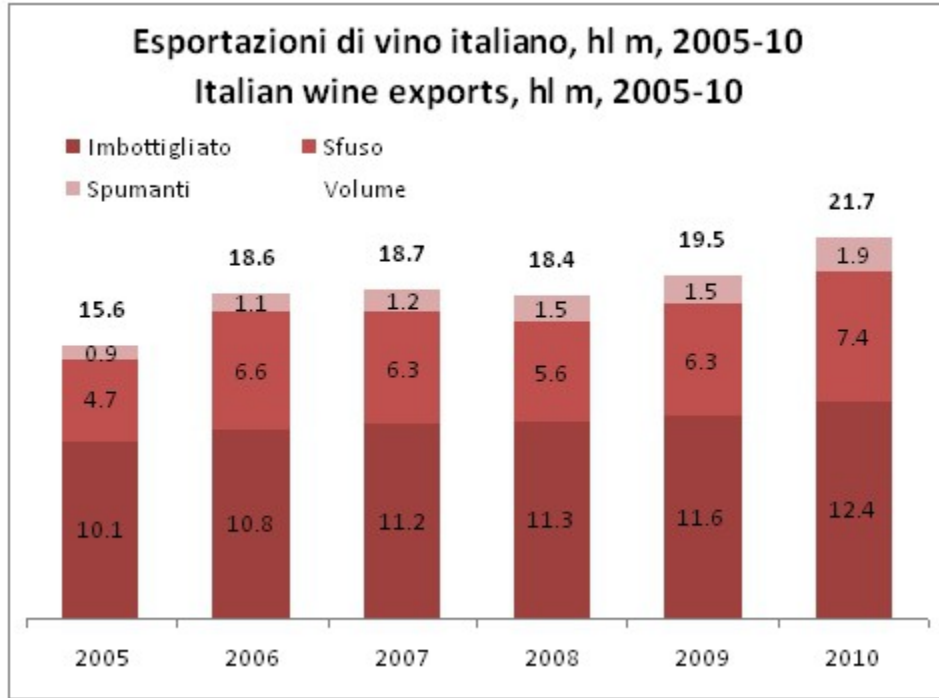


Fig. 2

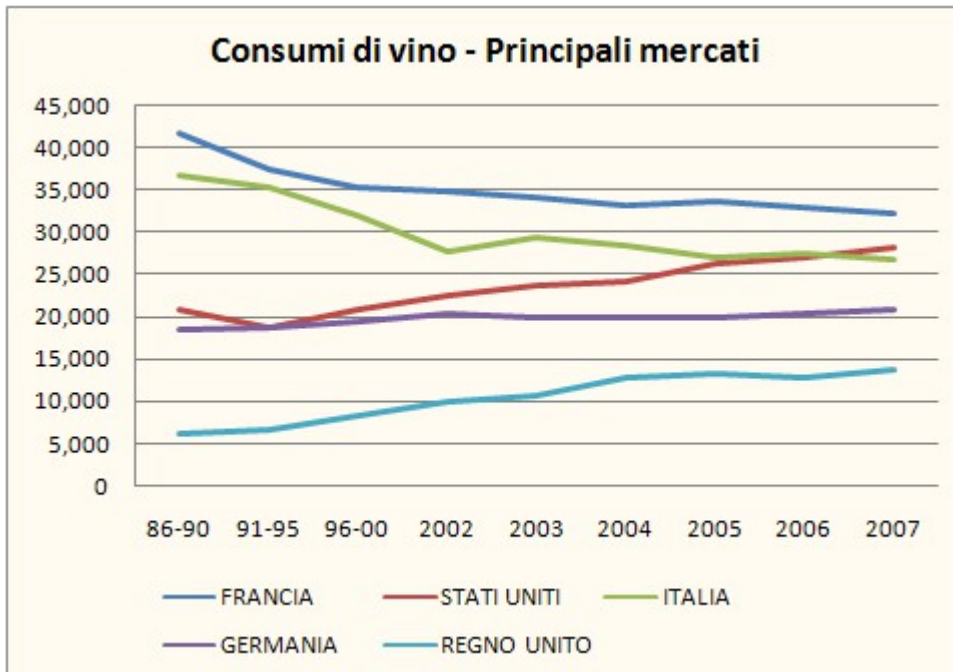


Fig. 6



Fig. 1

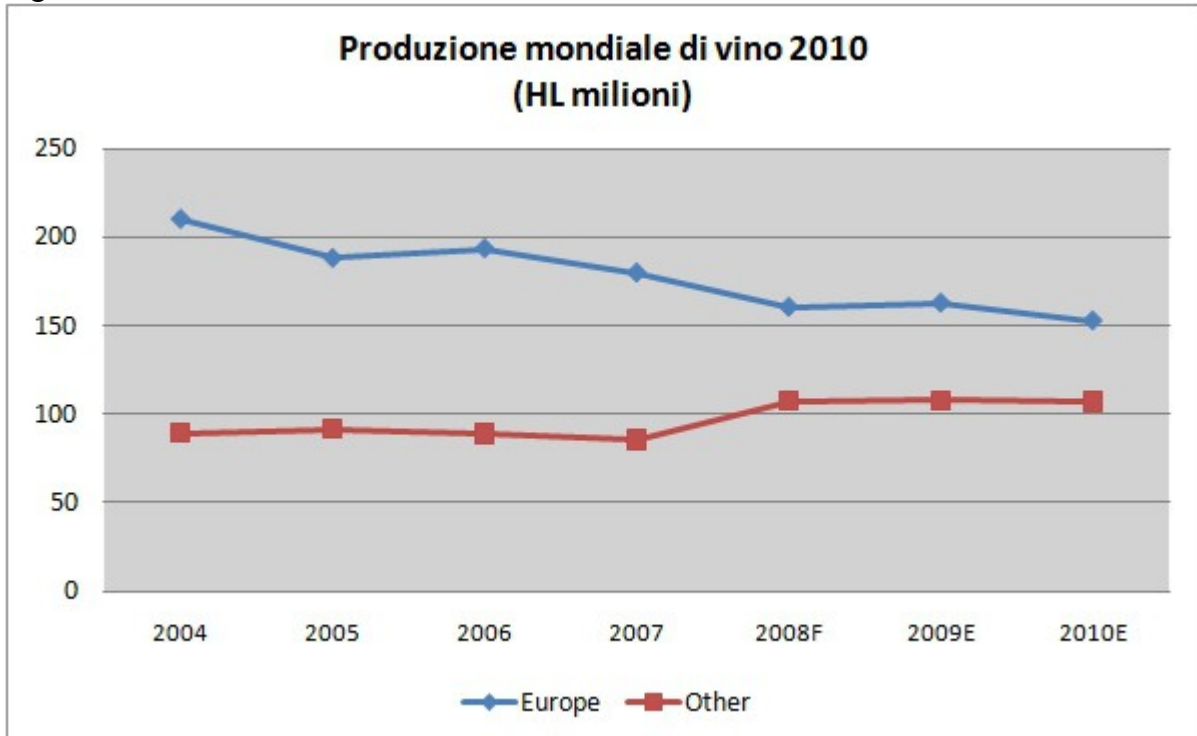


Fig. 3

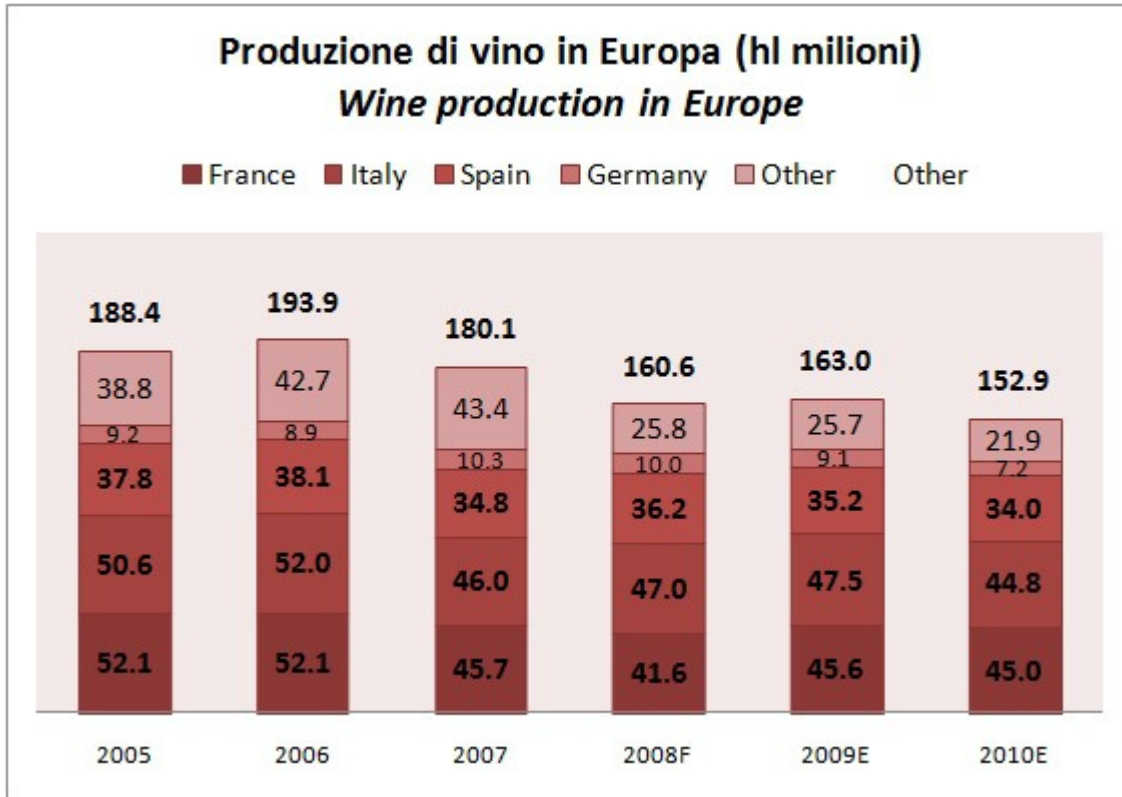


Fig. 4

Produzione vino Italia 2010 - dati finali ISTAT								
HI/1000	2005	2006	2007	2008	2009	2010	2010 vs. 2009	vs. media 05-09
PIEMONTE	3,054	3,229	2,724	2,480	2,858	3,006	5%	5%
VALLED'AOSTA	20	22	18	17	22	22	0%	9%
LOMBARDIA	1,100	1,081	1,099	1,250	1,277	1,349	6%	16%
TRENTINOALTOADIGE	1,057	1,159	1,221	1,140	1,254	1,161	-7%	0%
VENETO	7,093	7,208	7,799	8,119	8,174	8,351	2%	9%
FRIULI-VENEZIAGIULIA	1,159	1,014	1,029	1,014	752	1,334	77%	34%
LIGURIA	84	77	89	71	83	70	-15%	-13%
EMILIA-ROMAGNA	6,608	6,768	6,253	6,340	6,952	6,601	-5%	0%
TOSCANA	2,780	2,978	2,824	2,800	2,772	2,854	3%	1%
UMBRIA	998	1,103	998	843	987	875	-11%	-11%
MARCHE	1,206	1,090	757	871	782	927	19%	-2%
LAZIO	2,362	2,316	1,838	1,797	1,527	1,259	-18%	-36%
ABRUZZO	3,469	3,233	2,162	3,054	2,652	3,028	14%	4%
MOLISE	390	376	319	319	319	271	-15%	-21%
CAMPANIA	1,826	2,020	1,652	1,768	1,830	1,869	2%	3%
PUGLIA	8,348	7,397	5,668	6,949	5,920	7,169	21%	5%
BASILICATA	267	246	221	208	144	125	-13%	-42%
CALABRIA	539	484	406	445	392	323	-18%	-29%
SICILIA	7,283	6,974	4,574	6,180	6,175	5,676	-8%	-9%
SARDEGNA	924	859	862	582	550	475	-14%	-37%
ITALIA	50,566	49,633	42,514	46,245	45,422	46,745	3%	0%

In 2010, Italy produced 46.7 million hectoliters, 3% more than 2009, in line with the average of the last five years. Actually, it was 44.7 million hectoliters of wine and 2 million of must (mainly from Sicily, Apulia and Emilia-Romagna).

The GDP for the entire wine sector totals about EUR 14 bn, of which EUR 4.4 bn comes from exports.

The trends of the last few years are upheld, both in production and in cultivated areas. The sector seems very healthy up North and is in strong decline in central Italy (even though cultivated areas aren't going down as in other areas) and, in spite of a considerable decrease in cultivated areas, the South registered a good year, as far as quantities are concerned.

The production of 37.7 million hectoliters with 64.3 million tons of grapes picked indicates a ratio of 98 per hectare, quite high a level, even though it is attributable to the

gradually more heavy weight of Northern Italy, where ratios are steadily above 12 tons, and the loss of weight in central Italy, where sometimes ratios are below 8 tons.

Produzione vino italia - dati finali 2010
Wine production in Italy - final data

■ Nord ■ Sud ■ Centro ■ Sud

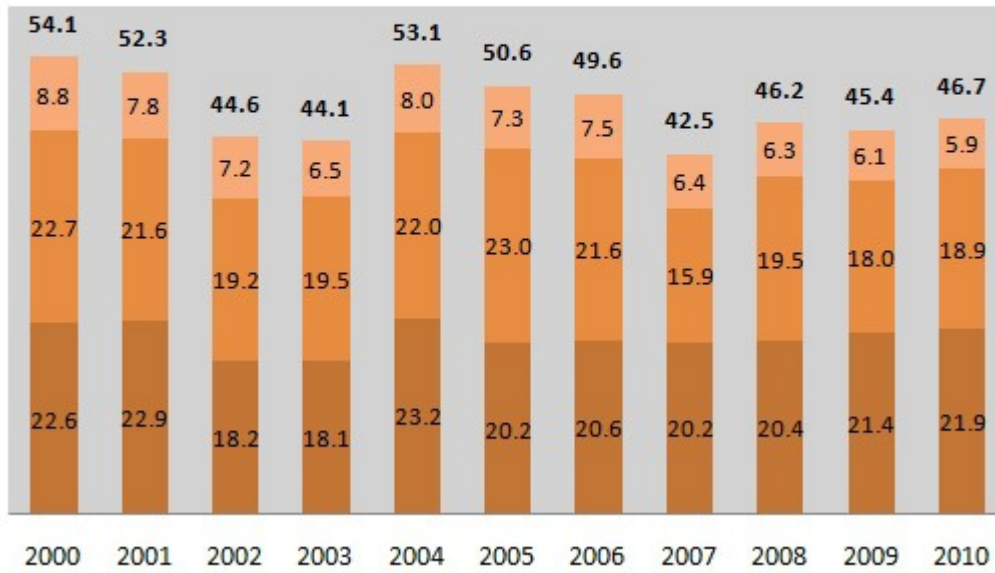


fig. 8



fig. 5

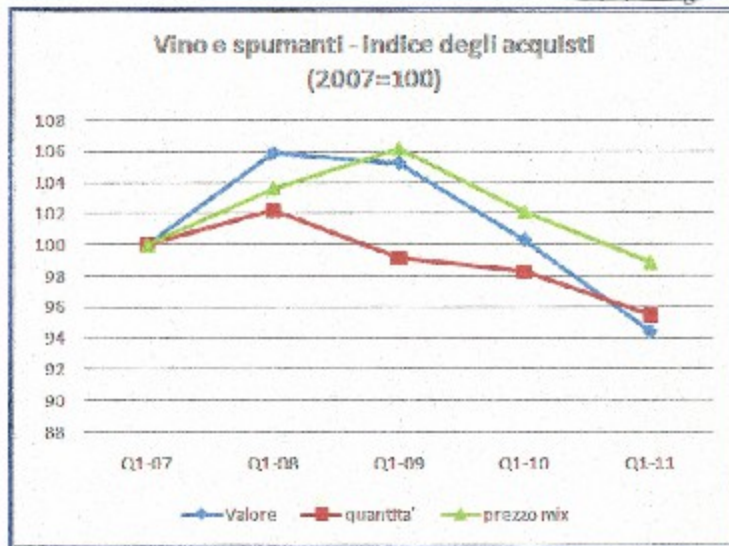
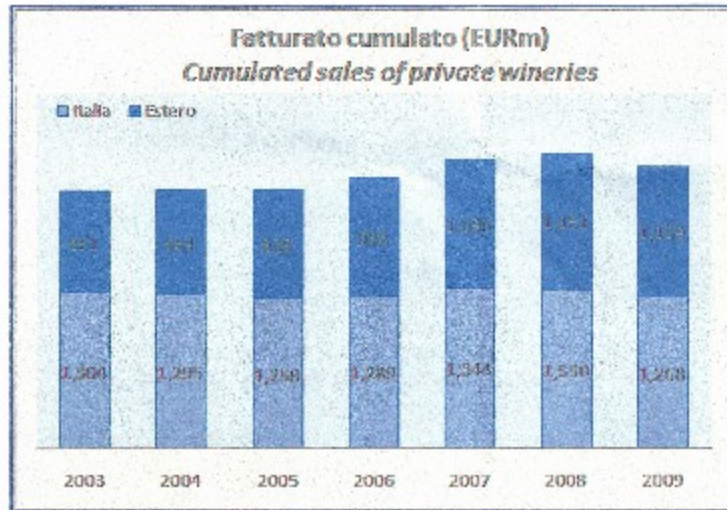


Fig. 1

I risultati 2009 delle aziende vinicole italiane – rapporto Mediobanca 2011



Da quanto il rapporto Mediobanca separa aziende da cooperative, i dati chiave da leggere sono diventati quelli delle aziende. Nel 2009 i trend chiave sono più chiari: il calo delle vendite è stato più che compensato dai minori costi esterni (materie prime e servizi), l'utile netto è triplicato e gli investimenti sono scesi (finalmente?) sotto gli ammortamenti. In altre parole, le aziende hanno investito il meno possibile, un livello tale da non essere probabilmente sostenibile nel futuro a patto di non voler mettere a repentaglio le prospettive aziendali. Molte delle tendenze che avevamo visto nel post precedente sull'andamento generale del campione sono qui più nette, non essendo diluite dalla poca significatività dei dati delle cooperative. Il 2009 è stato poi l'anno della generazione di cassa, complice il crollo degli investimenti (50-60 milioni sotto la media degli ultimi anni) e al rilascio di capitale circolante (altri 60 milioni), il combinato di queste 76 aziende ha generato circa 135 milioni di generazione di cassa e fatto calare il debito di circa 100 milioni (la differenza essendo presumibilmente stata distribuita agli azionisti). È questo un dato senza precedenti da quando il rapporto viene redatto, anche se come potete facilmente apprezzare i due aspetti sottolineati sono stati critici e senz'altro non saranno sostenibili nei prossimi anni. La conclusione è dunque che le aziende vinicole italiane hanno tirato decisamente i remi in barca e si sono concentrati sulla "gestione per la cassa" che ha caratterizzato moltissime (tutte?) le imprese non solo del mondo delle bevande alcoliche.

Fig. 7

Vendite al dettaglio Italia - fonte: ISMEA

Vino totale	2007	2008	Q1-09	H1-09	9M-09	2009	2010est
Valore	0,2%	3,7%	-0,6%	-5,6%	-7,4%	-9,0%	-5,9%
quantita'	-1,9%	-1,5%	-3,0%	-2,0%	-1,4%	-1,3%	3,2%
prezzo mix	2,1%	5,3%	2,5%	-2,7%	-6,1%	7,8%	-2,8%
Vino	2007	2008	Q1-09	H1-09	9M-09	2009	2010est
Valore	-0,5%	4,3%	-0,4%	-5,2%	-8,1%	-5,7%	-4,9%
quantita'	-3,1%	-0,1%	-0,4%	-2,5%	-1,1%	-1,9%	-1,7%
prezzo mix	2,7%	4,4%	0,0%	-2,8%	-7,1%	-7,7%	-3,1%
...DOC/DOCG	2007	2008	Q1-09	H1-09	9M-09	2009	2010est
Valore	11,9%	6,5%	-0,4%	-1,1%	-8,0%	-11,9%	-3,9%
quantita'	0,1%	1,2%	0,3%	2,0%	-0,2%	-1,7%	-1,3%
prezzo mix	3,1%	5,2%	-1,2%	-1,0%	-8,2%	-9,8%	-2,6%
...da tavola	2007	2008	Q1-09	H1-09	9M-09	2009	2010est
Valore	-1,7%	2,8%	-2,0%	-8,1%	-7,2%	-8,0%	-5,1%
quantita'	-5,9%	-2,2%	-6,9%	-6,4%	-4,3%	-2,6%	3,0%
prezzo mix	2,5%	5,1%	5,3%	-1,5%	-3,0%	-5,5%	-2,2%
Spumanti	2007	2008	Q1-09	H1-09	9M-09	2009	2010est
valore	5,0%	-3,1%	-0,5%	-5,0%	4,0%	-2,0%	-16,2%
quantita'	-1,2%	-4,8%	-3,3%	-10,0%	4,0%	0,4%	-18,7%
prezzo mix	6,3%	1,8%	2,8%	5,5%	0,0%	2,4%	3,1%

Fig. 8

Risultati cumulati - 72 aziende vinicole non cooperative con vendite oltre 25 milioni

EUR milioni, %	2003R	2004R	2005	2006	2007	2008	2009
Fatturato	2,165	2,179	2,186	2,281	2,440	2,490	2,377
Margine operativo lordo	258	256	277	312	307	262	270
Margine (%)	11,9%	11,8%	12,7%	13,7%	12,6%	10,5%	11,4%
Utile netto	64	74	94	90	46	19	60
Patrimonio netto	1,263	1,341	1,403	1,648	1,728	1,963	2,116
Debiti	1,007	1,002	1,099	1,091	1,250	1,296	1,391
Ritorno sul capitale	7,4%	6,8%	7,1%	8,1%	7,1%	4,8%	4,9%
Debiti/Patrimonio	0,8	0,7	0,8	0,7	0,7	0,7	0,6
Debiti/MOL	3,9	3,9	4,0	3,5	4,1	5,0	4,4
Investimenti/Fatturato	6,7%	6,2%	6,8%	8,8%	6,8%	7,0%	4,6%

Continua a leggere »

Scritto da banca alle 20:00, in [02. Dati finanziari, 05.2 Italia](#)

Wine Tasting Techniques

Visual Exam

Clarity.

Veiled : refers to an unclear wine with accentuated opacity and heavy cloudiness.

Moderately clear: refers to a wine with some suspended particles.

Clear : refers to a wine without any suspended particles

Crystal clear : refers to a wine completely free from suspended particles with a particularly intense brightness.

Brilliant : wonderfully bright, often heightened by the presence of carbon dioxide bubbles that reflect the light, so it is most often found in sparkling wines.

Color

Lemon green /Greenish yellow : very pale yellow with strong green reflections usually found in very young wines

Straw yellow : straw colored, with different intensities

Golden yellow : reminiscent of the color of yellow gold. This shade is found in more mature white wines.

Amber : found in fortified or passito (from dried grapes) wines, reminiscent of amber and topaz.

Soft rosé : the color of peach blossom or pink roses

Cherry rosé : similar to the pulp of some cherry varieties

Dark rosé : very light ruby red

Purple red : intense red with a marked purple glint, typical of young red wines

Ruby red : this shade resembles the color of the gemstone

Garnet red : similar in color to the gemstone

Orange red : a brick red hue often associated with red wines which have undergone a long aging period.

Consistency

Fluid : refers to a wine that flows into the glass very lightly like water

Barely consistent : moderately free-flowing with wide tears

Moderately consistent : refers to a wine that flows into the glass with moderate consistency, forming medium sized arches or tears.

Consistent : refers to a wine that flows into the glass slowly and heavily, forming slow and abundant tears.

Viscous : refers to a wine that flows heavily into the glass, like syrup; it has very close tears, typical of certain fortified wines

Effervescence

Perlage

Large: the size of bubbles found in mineral water

Moderately fine : average sized bubbles

Fine : very small bubbles, like pinheads

Bubble count

Very few : the number of bubbles is exceptionally low, almost non-existent.

Moderately numerous : bubbles appear in an inconsistent flow and form in few points in the glass

Numerous : plenty of bubbles rise continuously from many starting points of the glass.

Perlage persistence

Fading : bubbles vanish within a few seconds.

Moderately persistent : bubbles appear for a few minutes

Persistent : bubbles rise quickly and continuously

The Olfactory Exam

Intensity

Lacking : refers to a wine that has very delicate, almost imperceptible aromas.

Barely intense : refers to a wine that has delicate aromas

Moderately intense : refers to a wine that has fairly perceptible aromas.

Intense : refers to a wine that has distinct, pronounced aromas

Very intense : refers to a wine that has particularly marked and well rounded aromas

Complexity

Lacking : refers to a wine that has a very limited range of aromas

Barely complex : refers to a wine that has a small range of aromas.

Moderately complex : refers to a wine that has a sufficient or medium range of aromas

Complex : refers to a wine that has an abundant range of different aromas

Broad : a broad range of different aromas

Quality

Coarse : without any particular aromas

Barely refined : without many pleasing elements and poor quality

Moderately refined : quite pleasant aromas with reasonable intensity and a variety of nuances.

Elegant : refined aromas and good intensity, showing a good range of aromas and qualities typical of the variety.

Excellent : a particularly elegant bouquet of great intensity and an ample range of aromas that are a great expression of style and of the grape variety.

Description

Aromatic : is used to describe the primary aromas of a wine obtained from aromatic grapes such as Muscat, Malvasia, Brachetto and Gewurztraminer.

Wine scented: generally found in young red wines. This is the scent perceived in a winery during vinification

Floral : is used to describe floral scents, which may be numerous.

Fruity : reminiscent of a wide variety of fruits, including fresh fruit with pale or dark pulp,

very ripe fruit, exotic fruit even fruit jam and dried fruit.

Frank : a clear, well defined aroma not masked by other sensations however pleasant.

Fragrant : refers to the freshness of floral and fruity essences. It may also call to mind the fragrance of bread crust in sparkling wines

Herbal/Herbaceous : green vegetable or herbs and the smell of cut grass

Mineral : mineral and salty scents, such as flint, graphite or brackish notes

Spicy : various spice aromas

Ethereal : the aromas of mature wines

The Taste Olfactory Exam

Sugars

Dry : no perceptible sweetness

Medium Dry : a very light sensation of sweetness

Medium sweet : a clear but delicate sensation of sweetness

Sweet : a very marked and pleasant sensation of sweetness.

Cloying : the sensation of sweetness is strong and prevailing and is not supported by other wine characteristics

Alcohols

Light : perception of a very weak feeling of warmth.

Barely warm : perception of delicate warmth

Moderately warm : perception of a light and pleasant warming sensation

Warm : perception of a markedly warm sensation

Alcoholic : a strong and predominant sensation of alcohol warmth is perceived

Sugar Alcohols

Sharp : no perceptible smoothness

Barely smooth : smoothness is difficult to perceive

Moderately smooth : a medium and pleasant smoothness is perceived

Smooth : a clear and pleasant velvety smoothness is perceived

Velvety : a marked and predominant smoothness is perceived. This sensation is generally found in dessert wines.

Acidity

Flat : total lack of freshness

Barely fresh : perception of a delicate sensation of freshness.

Moderately fresh : perception of a medium and pleasant sensation of freshness.

Fresh : perception of a marked sensation of freshness

Acidulous : perception of a strong and predominant sensation of freshness

Tannins

Flabby : a sensation of dullness is perceived due to a minimal level of tannins

Barely tannic : perception of a slight sensation of dryness.

Moderately tannic : perception of a medium and pleasant sensation of dryness.

Tannic : perception of a clear, strong sensation of dryness and roughness

Astringent : perception of a prevalent and unpleasant sensation of dryness and roughness.

Mineral Substances

Tasteless : refers to a wine lacking in any mineral sensations, bland.

Barely sapid : perception of a delicate mineral sensation

Moderately sapid : perception of a medium and pleasant mineral sensation, perfectly balanced

Sapid : perception of a decisive and pleasant mineral sensation.

Salty : a predominant and unpleasant saline sensation.

Structure

Thin : a wine in which the structure is anomalous and insufficient.

Weak : the structure is moderate

Full-bodied : structure is good, rich in extracts

Robust : The structure is strong and very rich in extracts.

Heavy : the structure is excessive and unpleasant, resulting in palate fatigue.

Balance

Barely balanced : refers to a wine with a decisive and unpleasant prevalence of the sensations of hardness over softness or vice versa.

Moderately balanced : a wine with a fair prevalence of the softness sensations over those of hardness or vice versa

Balanced : a wine with an adequate and pleasantly proportioned level of hardness and softness.

Intensity

Lacking : a wine with little flavor, taste or tactile elements.

Barely intense : delicate flavor, taste and tactile elements.

Moderately intense : medium flavor, taste and tactile elements.

Intense : a wine with clear and well established flavor, taste and tactile elements.

Very intense : generally referring to a wine rich in extracts in which strong flavor, taste and tactile sensations are perceived.

Aromatic – Intense Persistence

Short : taste-olfactory persistence is less than 2 seconds.

Barely persistent : taste-olfactory persistence is between 2-4 seconds

Moderately persistent : test-olfactory persistence is between 4-7 seconds

Persistent : taste-olfactory persistence is between 7-10 seconds

Very persistent : taste-olfactory persistence is over 10 seconds

Quality

Coarse : a wine lacking any quality, with a finish that may be very unpleasant.

Barely refined : mediocre flavors and aromas and a barely pleasant finish.

Moderately refined : a wine with sufficient or fair taste and bouquet, a good balance and a pleasant finish.

Refined : good quality, perfectly balanced, with an elegant finish.

Excellent : outstanding quality, a finish rich in personality, class and complexity.

Final Remarks

Evolutionary State

Immature : this wine needs further maturing and bottle aging

Young : a wine that does not yet have appreciable balance in terms of flavors and aromas.

Ready : wine with good balance, ready for drinking and appreciable, but which could still benefit from further aging

Mature : refers to a wine that, regardless of its age, has excellent balance and all its qualities have reached their peak.

Old : refers to a wine in which signs of decay are present.

Harmony

Barely harmonious : a wine in which there is a clear discrepancy between the three assessment parameters (visual, olfactory and taste)

Moderately harmonious : a wine in which there is a slight discrepancy between in one or more of the tasting parameters

Harmonious : all the parameters evaluated in the three phases of taste-olfactory examination match perfectly with quality at its peak.