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## News



### WE awards Sicily

Sicily's been one of the most important emerging wine regions for some years now, and according to "Wine Enthusiast" magazine, it is one of the "Best Wine Destinations 2017", not to mention the only Italian one on the list. Kerin O' Keefe, Italian editor of the U.S. magazine, says Sicily is a paradise for wine lovers, due to its breath-taking landscapes, great wine and Europe's tallest active volcano, boasting winemakers such as Donnafugata, Planeta, Rapolà, Cos, Tasca d'Almerita and Cottanera, among other that are giving the value it deserves to a "wine continent" that from Marsala to Etna and from Vittoria to Noto, features high-quality wines, unique landscape, cuisine and culture.



### SMS Veneto, what a performance

50 million hectolitres produced and exports value going up 3%, towards a new record, 2016 has closed its books favourably for Italian wine. This goes double for Veneto, since the Region, thanks to the incredible international success of Prosecco, has consolidated its leadership among all Italian regions when it comes to exports. Taken on its own, Veneto would be in fourth place in the ranking of global wine exporting countries by value, behind France, Italy (as a whole) and Spain, as stated in an analysis by Veneto Agricoltura. Thanks to Prosecco DOC and DOCG, and to other denominations, of course, like Valpolicella, Soave and Bardolino, the value of Venetian wine exports has overtaken that of entire countries, like Chile, the U.S. and Australia.

## Report

### Record exports in 2016

According to a projection based on ISTAT data related to the first 9 months of 2016, made by farmers union Coldiretti, Italian wine & food exports in 2016 have shattered the 38 billion Euros mark (up 3%), 75% towards the European market (up 4%) and growth in all other markets, Russia aside. Furthermore, wine is the spearhead of the sector, with 5.6 billion Euros in value and a 3% growth year-over-year, right ahead of fruit and veggies (5 billion, up 4%) and cheese (2.4 billion, up 7%).

## First Page

### Mediobanca: discounts rule Italian mass retail

According to the latest report penned by the analysis centre of Italian merchant bank Mediobanca dedicated to Italian mass retail, discount chains are the new "kings" of the sector - the same where 70% of all wine is sold in Italy. Namely, turnovers of Lidl Italia and Eurospin Italia have skyrocketed (up 43% and 42.9%, respectively), compared to Esselunga (up 11.6%) and Iper Unes (up 7%), and cooperative giant Coop going up a mere 0.1%, while the Pam Group and big French players Auchan-SMA and Carrefour have gone down 4.9%, 19.6% and 9.4%. The report, which focuses on Italian groups from 2011 to 2015 and international players from 2014 to 2015, underlines the fact that the average turnover of the main Italian mass retail operators has gone up 4.5% between 2011 and 2015, and an additional 1.9% in 2016. Overall, 2015 has been a turning point, with Carrefour growing for the first time since 2012 (up 6.1%), but good performances were registered also for Lidl Italia (up 9.6%), Eurospin Italia (up 6.7%) and Esselunga (up 4.2%) - the single biggest player, with sales reaching 7.2 billion Euros, followed by Carrefour, at 4.9 billion Euros, by Eurospin, at 4.4 billion and overtaking Auchan-SMA, at 4.15 billion. Furthermore, Esselunga is also the most efficient player by a wide margin: in 2015, it has reached 15.732 Euros in sales per square meter, more than double the average in Italy (7.184 Euros per square meter). When it comes to ROI, though, Lidl Italia (23.7%) and Eurospin Italia (20.6%) have done better than Esselunga, since the group founded by Bernardo Caprotti is at 16%. When it comes to net profits, since 2011 Eurospin has reached 635 million Euros, three times as much as Lidl Italia (206 million), but little more than half of Esselunga, at a telling 1.1 billion Euros, while Carrefour and Auchan are deep in the red (down 2.5 billion Euros and 559 million, respectively). Finally, when it comes to Coop, 2015 has given them an aggregate turnover of 10.9 billion, an operating loss (down 0.7% in turnover), but with a positive result (3.1% of the turnover), thanks to the contribution of financial management (3.8% of turnover).

## Focus

### Professor Moio on the OIV tenets

OIV, the International Organisation of Vine and Wine, is the biggest intergovernmental organization in the global wine world, counting 46 member States and 85% of all wine production. Through its resolutions, every year it adopts a series of "tenets" that are an interesting snapshot of the future of wine, and according to Luigi Moio, Professor of Viticulture at Naples University and President of the Oenology commission of OIV, "Environment is going to be a theme for wine in 2017, as well as in future years, and the OIV-CST resolution 518-2016 has stressed that. Development of production techniques that preserve natural resources, as well as enriching the areas where production is situated, are fundamental for long-term sustainability of winemakers". The resolution defines, more precisely, "sustainable wine production", and its general principles more clearly when applied to wine-related products. This in turn, "generated, and will generate, more discussion in the development of this key theme", Moio pointed out, "since the theme also includes the health of wine, of its players in its sectors, of consumers and of the environment from where the wines come".



## Wine & Food

### Prosecco, the star of Christmas festivities in the UK

Christmas 2016 has been the icing on the cake for Prosecco in the UK. The discount chain Aldi has seen its sales go up 15% year-over-year, and has sold 2 million bottles of the Venetian sparkling in December alone (69.000 a day). Majestic Wines, meanwhile, has seen sales from November to January go up 6.2%, and those 10 weeks are worth 30% of all annual sales of the chain. Their sparkling wines sales have gone up 12%, while Champagne sales only grew 3%, and for each one of Champagne 3 bottles of Prosecco were sold.

## For the record

### More chaos on EU wine promotion funds

2017 is bringing with it the chaos created regarding EU wine promotion funds last year. On Dec. 29th, the Ministry of Agriculture created a new decree to distribute

the 13 million Euros that were not used, but appeals abound, and more than one player has asked for clarification for the Regional quota of the fund (70 million Euros).



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