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## News



### A surprise at McDonald's

The new McDonald's store that opened this week in Marino, just outside Rome, is the global chain's first "fast food museum", since an ancient Roman road was found underneath the store's perimeter, and subsequently brought back to light, after two hard years of work. The road itself dates back to the second century B.C., is 45 meters long, following the old Appian Way, and has remained buried for over 1.500 years. The entire area can now be visited free of charge, thanks to a joint public-private renovation of 300.000 Euros financed by McDonald's Italia, together with the Archaeology Superintendence of the Metropolitan Authority of Rome.



### Achilles & the tortoise

Just like Zeno's most famous paradox, Achilles and the tortoise, the growth of Italian wine in China, notable as it may be, cannot bridge the gap that separates it from France and Australia (but also Chile and Spain). Even if shipments have gone up 37.2% in 2016, with a record 120.2 million Euros, Italy's competitors are farther and farther away. And to fully comprehend it, one just needs to look at what the Observatory of Business Strategies and Wine Monitor pointed out: Bordeaux alone has exported 310.6 million Euros worth of wine, 258% more than Italy in its entirety. Furthermore, the outlook is not rosy either. In the next few years, Chile, New Zealand and Australia might fare a lot better than Italy, given the fact that they can export to China free of customs duties.

## Report

### An M&A week

This week, two important winemakers changed hands: in Lombardy's Oltrepò Pavese, La Versa winery was acquired by Terre d'Oltrepò through an auction, and in Piedmont's Langhe region, Poderi Colla, a historic name of Piedmont wine, bought the Cascina Bricco Bompè winery and 2 hectares of vineyards in Alba, from Barolo maker Boroli. Now Colla owns 28 hectares in all, while Boroli remains the owner of the neighbouring Locanda del Pilone Relais and restaurant (with one Michelin star).



A CAMPAIGN FINANCING IN ACCORDING TO REG. EC N. 1306/2013

## First Page

### Zonation in Italy increasingly gaining traction

It's still far from a mantra, but the matter of zonation is becoming increasingly important in the great Italian wine territories. The matter, by its very nature, is vast and complex, but one thing should be pointed out right away: zonation is not a classification, since the objective is not to create a quality pyramid, like the one that has been active in Bordeaux since 1855, but it's rather a mapping of the territory, so as to pinpoint and describe areas, hills and single vineyards, based on analytic data for soils and grapes, and all this over a relatively long timespan. The names are, generally speaking, commonplace among the more savvy wine lovers and producers, like the crus of Barolo and Barbaresco, from Cannubi to Bricco San Pietro, where zonation, after more than a century after Lorenzo Fantini's seminal and pioneristic work, is a real and tangible phenomenon. Of course, much remains to be done in Langa, but it is without a doubt a first answer to an ever more demanding general public, and Chianti Classico has picked up on that, with the Gran Selezione opening the doors to a frank discussion on the matter - and, one that a few days ago was publicly commented on by none other than one of the main players in that area, Marchese Piero Antinori, in "Civiltà del Bere" magazine. A few steps forward were taken from the first mapping by Alessandro Masnaghetti in 2014, in "Chianti Classico, the search for Tuscany's noblest wine", by Master of Wine Bill Nesto, where he analyses and points out some areas. In the land of Brunello di Montalcino, zonation has been a topic for years, but the process itself is still going forward slowly, and on a firm-by-firm basis, among different opinions and single vineyard selections. Some, like Conte Francesco Marone Cinzano (Col d'Orcia) are going forward with it, and some others, like Riccardo Illy (Mastrojanni) seem to remain sceptical. Finally, Etna, one of the great "new" Italian territories, has, on the other hand, bet on zonation since it started having success, and now seems to have doubled down on it. As Diego Cusumano pointed out, "we want to exalt the potential of every contrada".

## Focus

### Small numbers for ecommerce in Italy

Wine & food ecommerce keeps growing in Italy. The sector reached 575 million Euros in value (up 30% over 2015), 90% from food, and around 8% from wine. The growth is notable, but in the grand scheme of things, it's still a drop in the sea, compared to both ecommerce in its entirety (3% out of 20 billion Euros in the sector) and to traditional retail (a minuscule 0.35%). Exports - that is, sales that go beyond national borders - are just 10% of all sales, and 2% of all ecommerce exports. The data comes from the eCommerce B2C Observatory created by Netcomm and Milan's Polytechnic Institute's School of Management. 60% of all sales in the food sector are for "dry" products (that is, packaged ones), 31% for "fresh" ones (controlled temperature ones), 7% for drinks and 2% to frozen products. Sales through smartphones have doubled, to 100 million Euros (17%, and 25% if one adds tablets as well). Sales of selected, higher-value wine & food products have gone up 17%, reaching 240 million Euros in value, for a 47% market share, while grocery sales through the websites of mass retail chains have gone up a remarkable 40%, to 188 million Euros in value.



ARNALDO CAPRAI

Viticoltore in Montepulciano

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## Wine & Food

### Wine tourism clashes with the Italian revenue service

Matilde Poggi, President of the Italian Federation of Independent winemakers FIVI, recently asked that "profits coming from visits and tastings should fall under the agricultural revenue category" regarding the Unified Law on Wine Tourism, which is currently being discussed in the Italian Senate, and is signed by Senator Dario Stefano. For FIVI, wine tourism "should be a prerogative of those firms that handle all production phases, from the plant to the bottle, in order to give to those who work in the territory their due".

## For the record

### Gallo chooses Argiano for its "Lux Wines"

The U.S. market, studies say, will grow on higher price tiers, and that is probably why E. & J. Gallo (960 million bottles per year) has chosen Montalcino's Argiano - owned by

Brazilian entrepreneur André Esteves since 2013, with 57 hectares, 22 for Brunello - for its "Lux Wines" product line, which will focus on high-quality labels.

