

Un “nuovo” potenziale per il vino italiano

*Una corretta gestione
della produzione per adeguare
l’offerta ai mercati post-Covid*

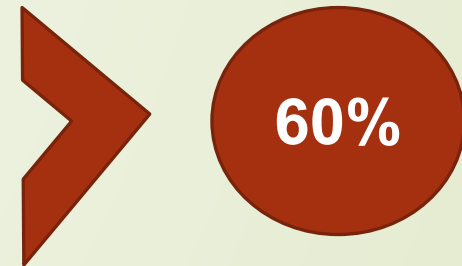
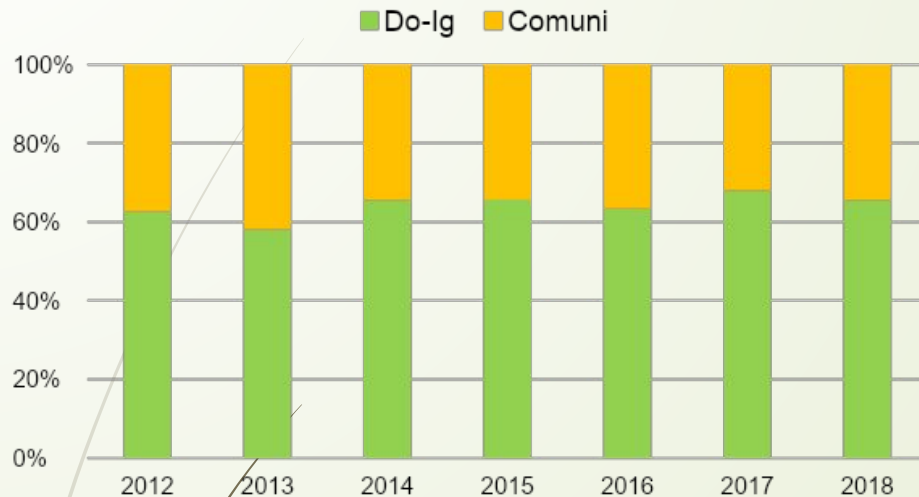
Carlo Flamini
Osservatorio del Vino
Unione Italiana Vini

L'analisi del potenziale

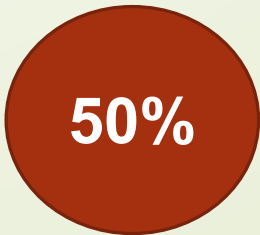
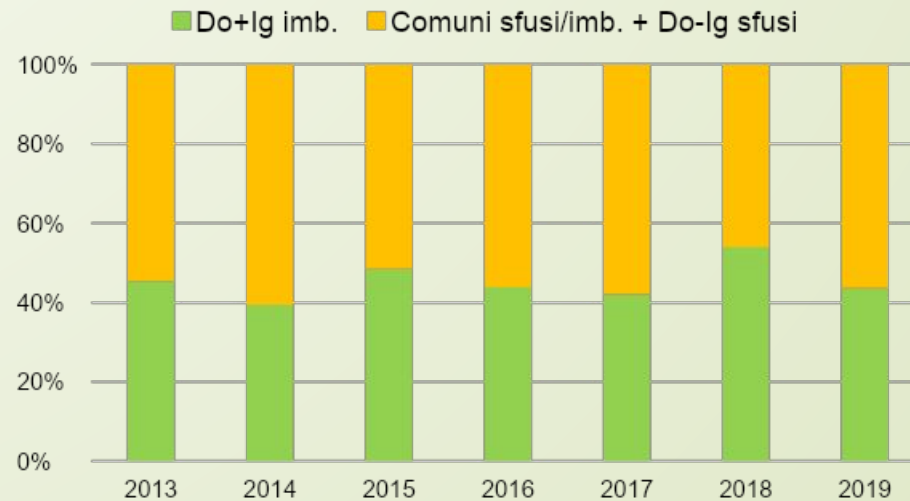


Come si parte e come si arriva/1

Potenziale produttivo

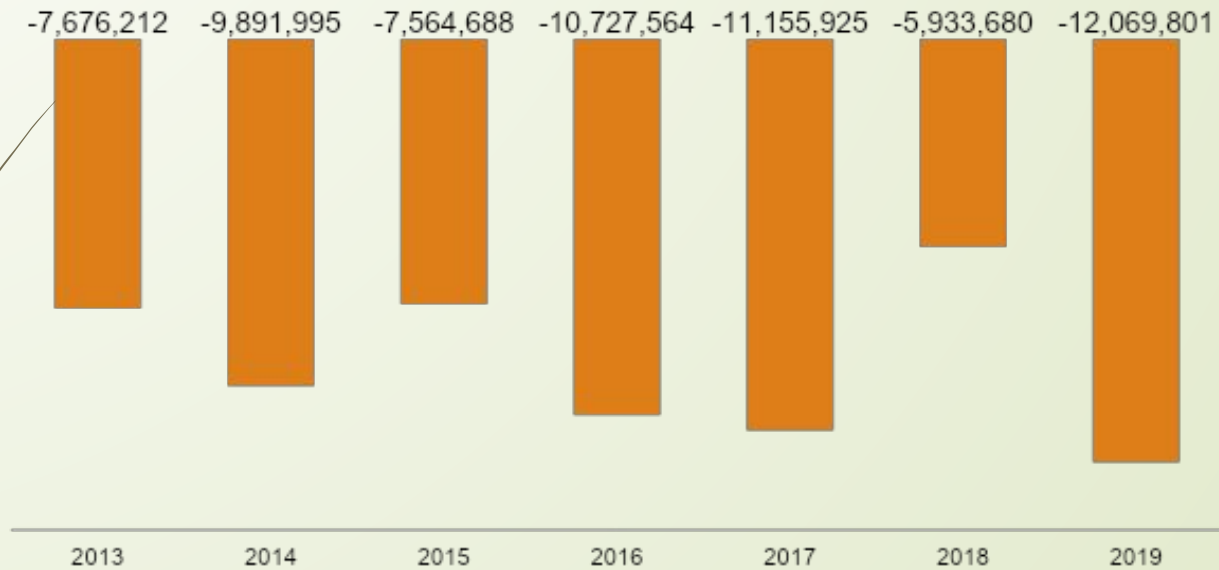


Post imbottigliamenti



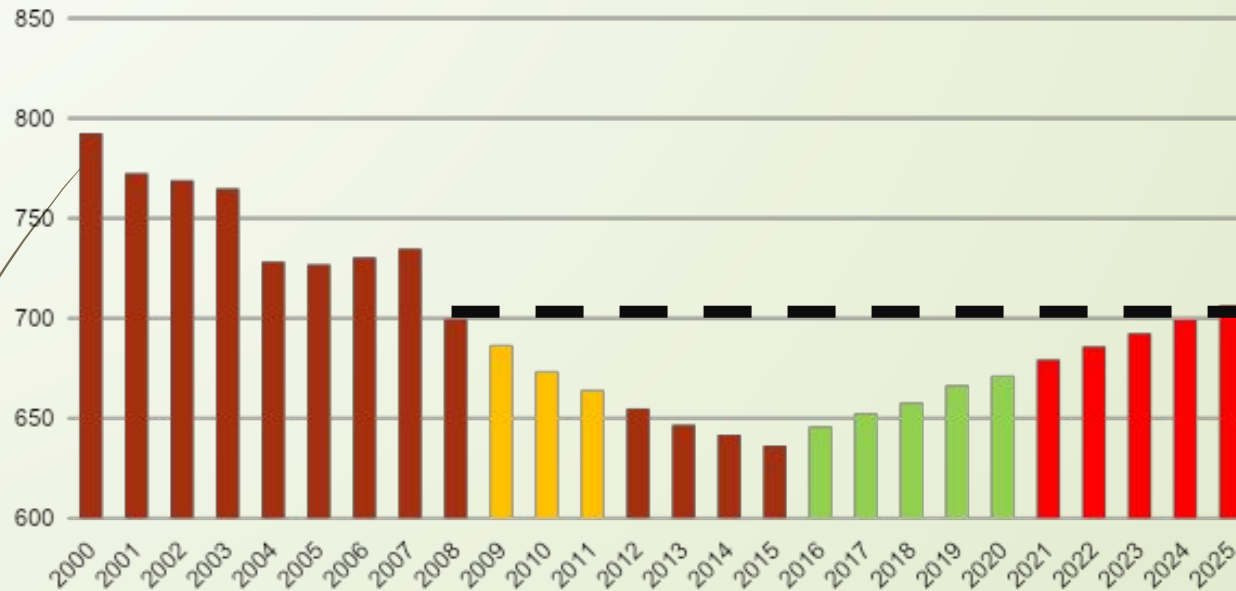
Come si parte e come si arriva/2

Saldo Do-Ig imbottigliate/potenziale
(milioni di hl)



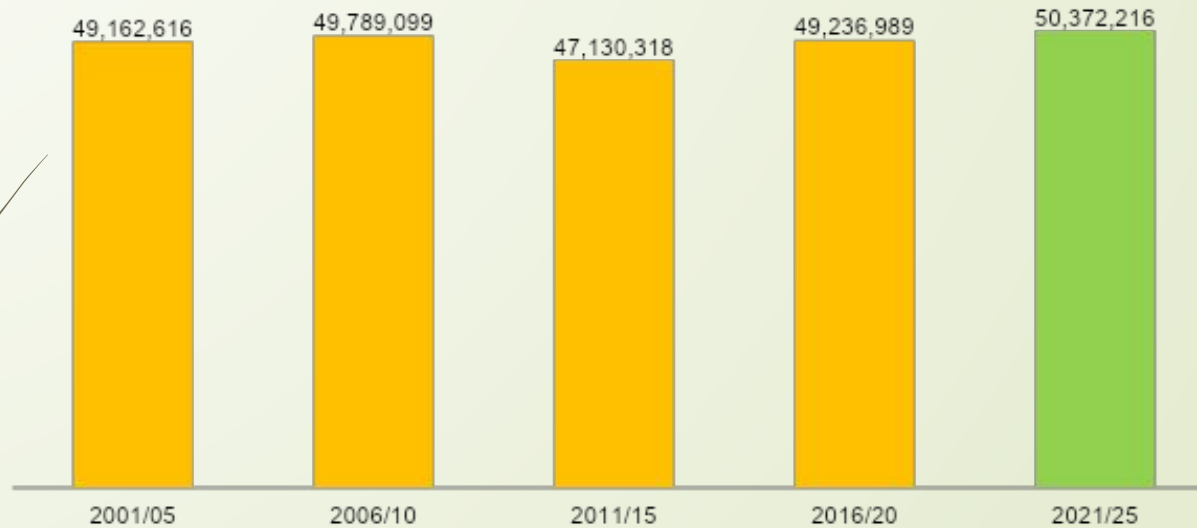
L'evoluzione attesa del vigneto

Evoluzione e prospettive del vigneto Italia (.000 ettari)

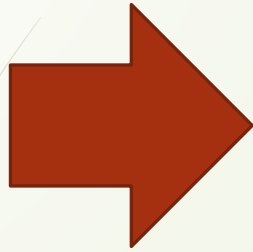


Le medie produttive

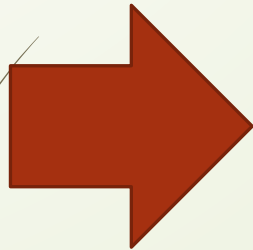
Medie produttive storiche e attese (milioni di hl)



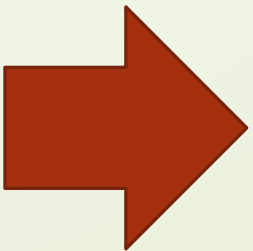
Riassumendo



Potenziale tendente all'aumento



Nuova offerta vincolata verso il basso



Quota contoterzismo molto alta

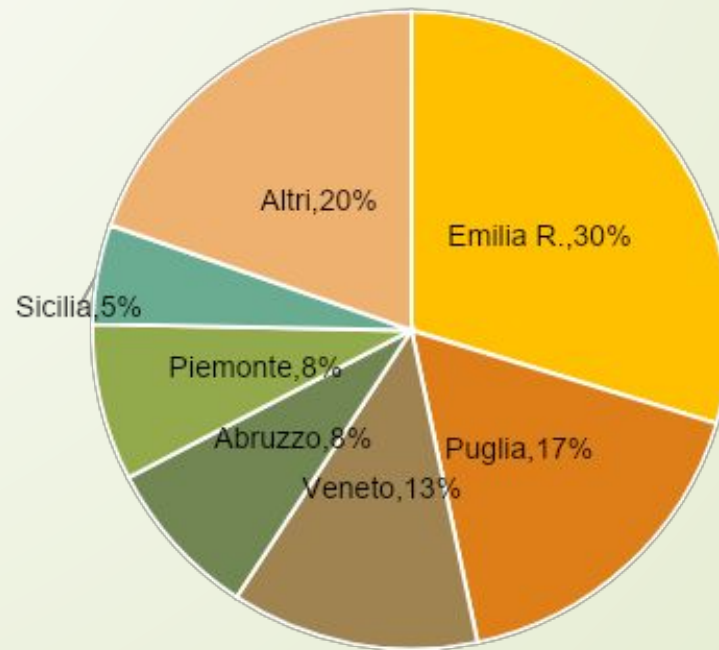


Il segmento basic e il governo delle Igt



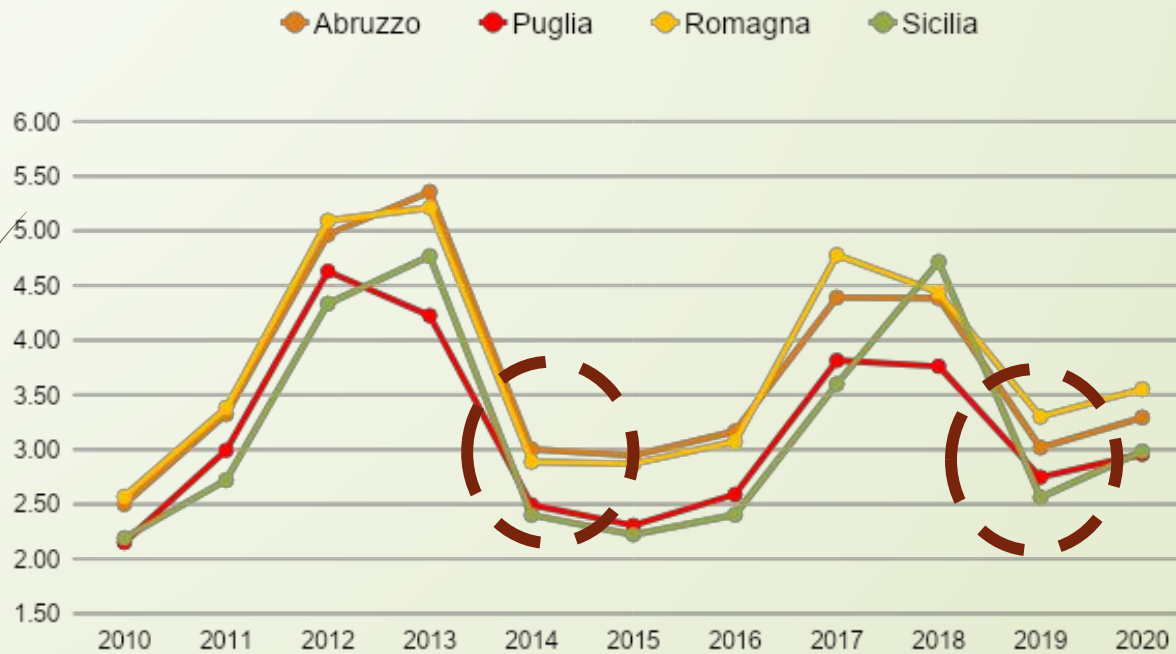
Dove sta il vino commodity

Giacenze di vino comune per regioni



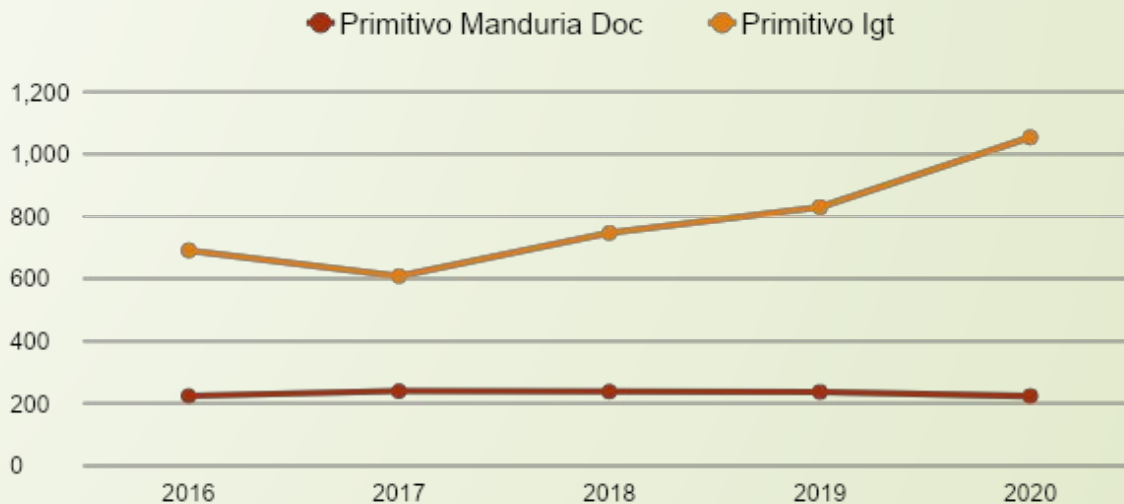
Il saliscendi dei prezzi

Prezzi vini bianchi comuni (euro/ettogrado)

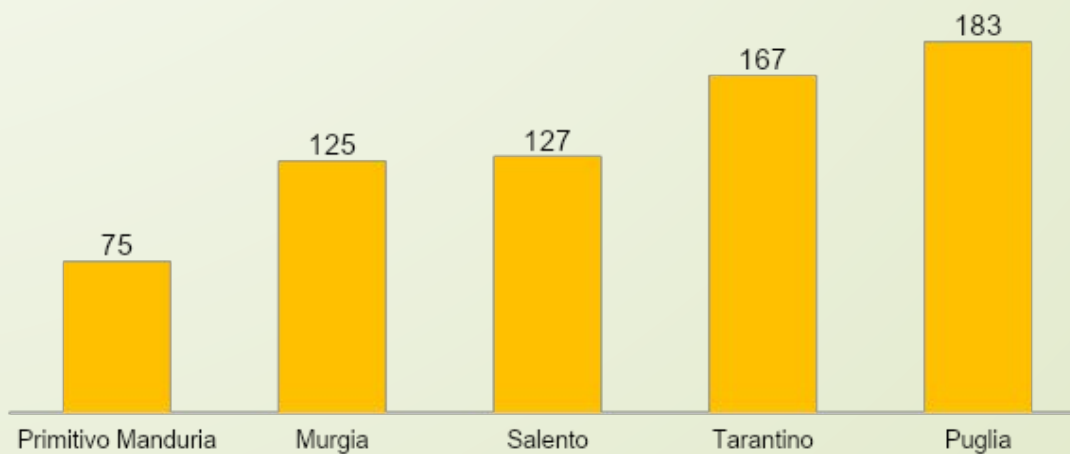


Il Primitivo Igt, risorsa da tutelare

Evoluzione produzioni Primitivo (.000 hl)

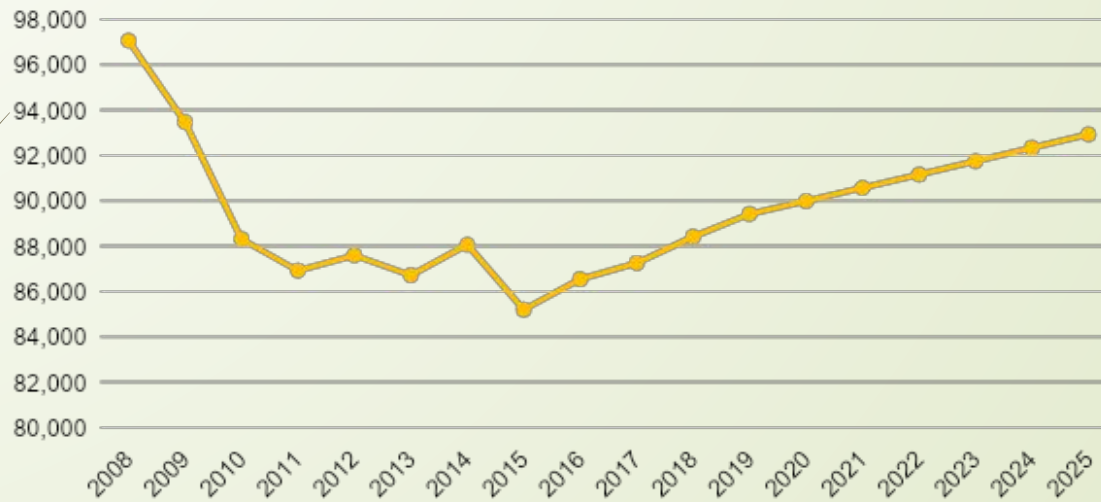


Rese medie 2016/20 (q.li/ha)

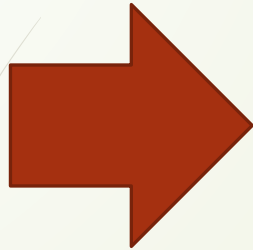


Un traino per tutta la Puglia

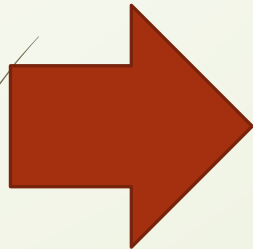
Evoluzione prevista vigneto Puglia (ettari)



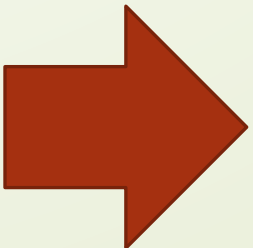
Riassumendo



Mancanza di filiere specializzate



Si produce in maniera incontrollata



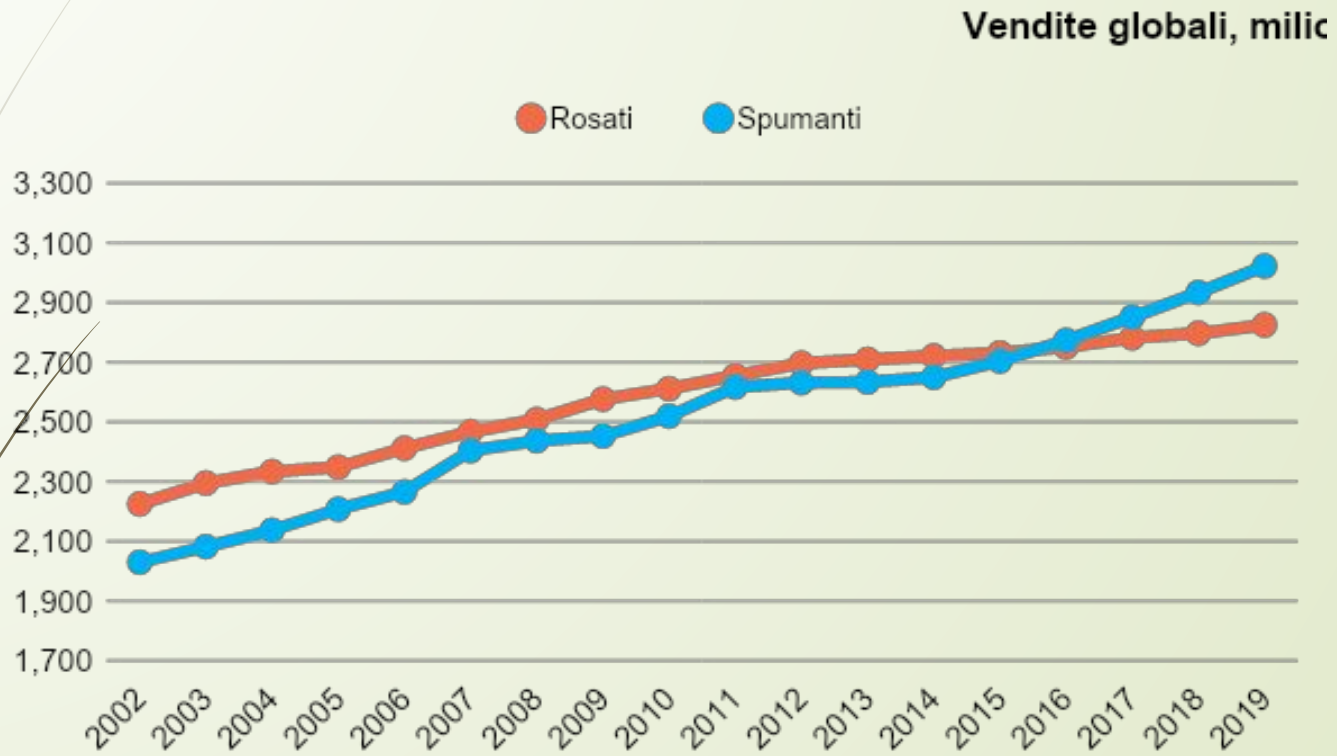
Ragionare non solo di rese



Interpretare i segnali



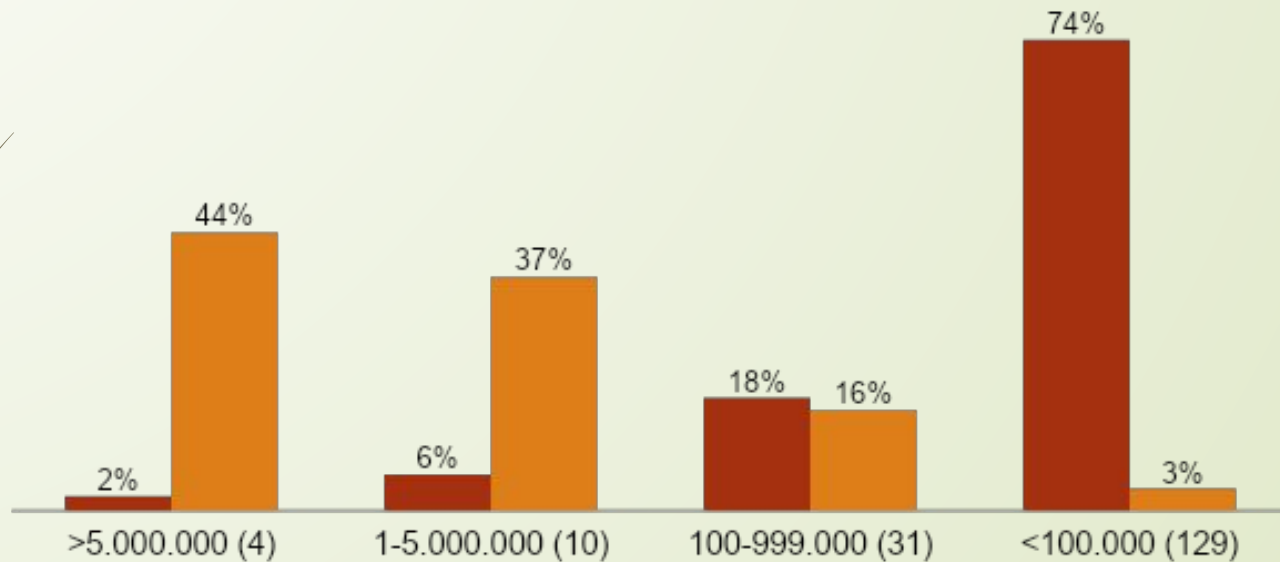
Quello che tira nel mondo (oggi)



La struttura dei rosati italiani

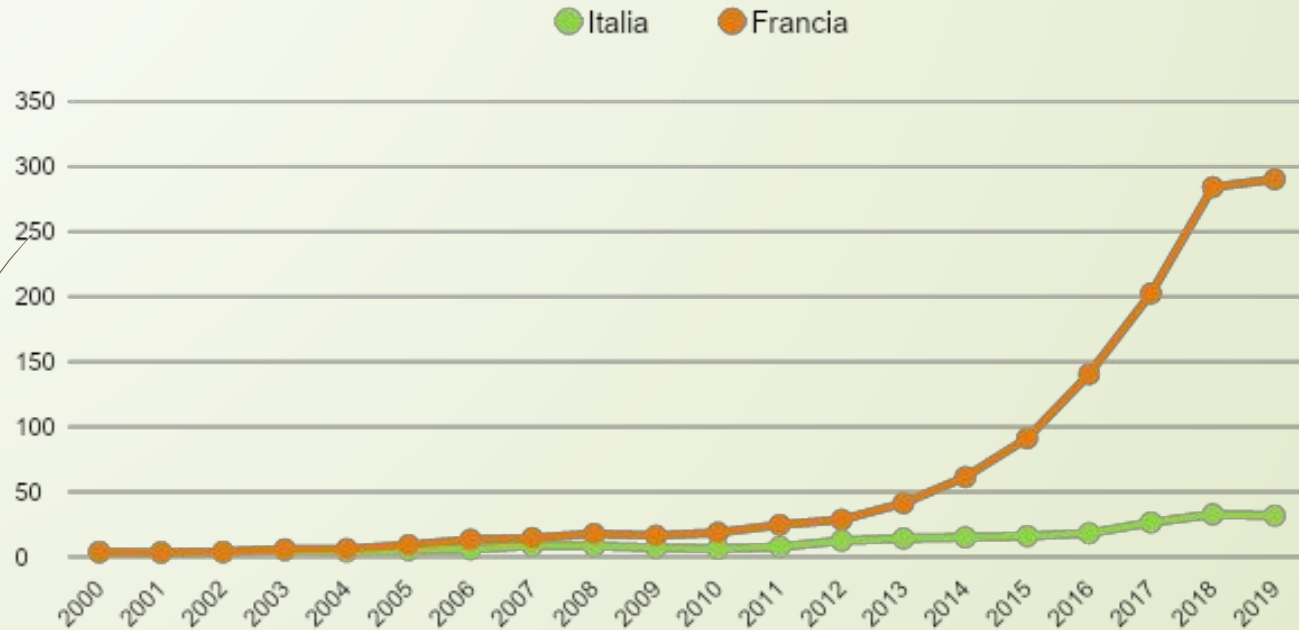
Ripartizione vini fermi rosati per classi di produzione totale 68 milioni di bottiglie

■ % su totale ■ % su tot. Imb.



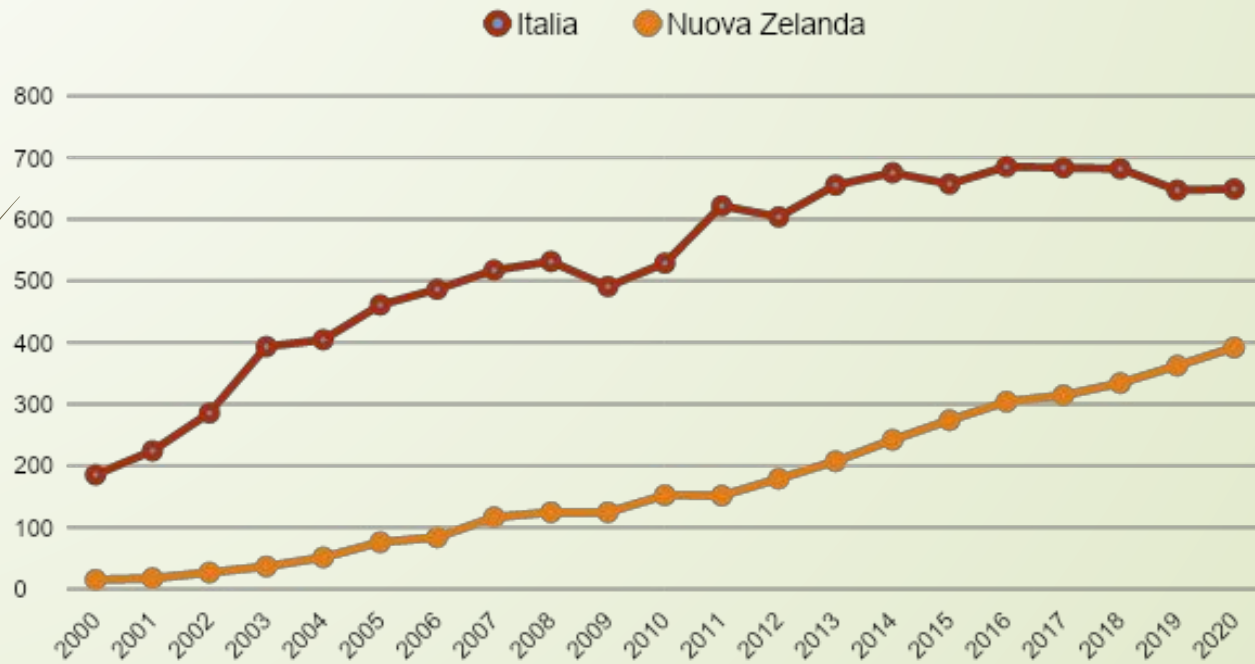
Vini rosati in Usa, dinamiche differenti

Import Usa di vini rosati (milioni di US\$)

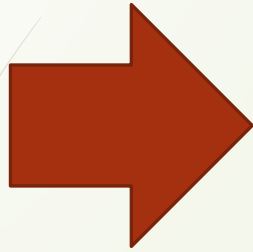


L'ascesa dei bianchi neozelandesi

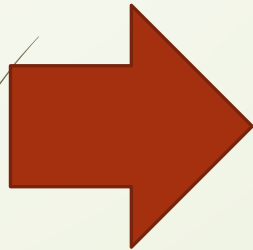
Import Usa di vini fermi bianchi (milioni US\$)



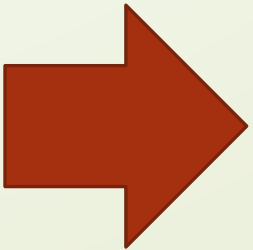
Riassumendo



Offerta parcellizzata



Inadeguata risposta alla domanda



Surplus produttivi da svendere

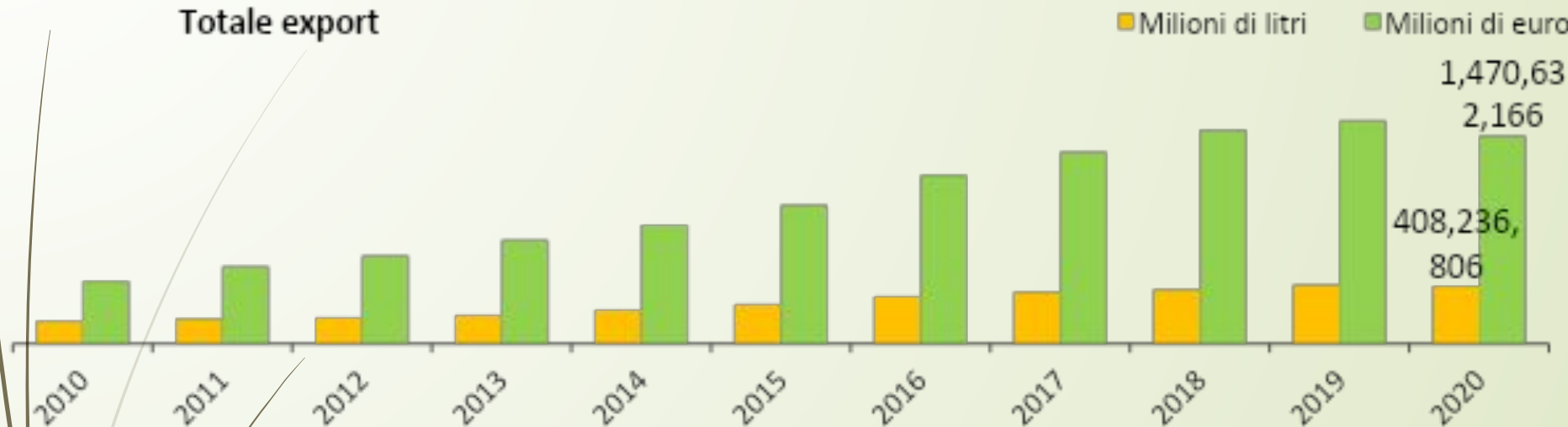


La nuova Sparkling Land

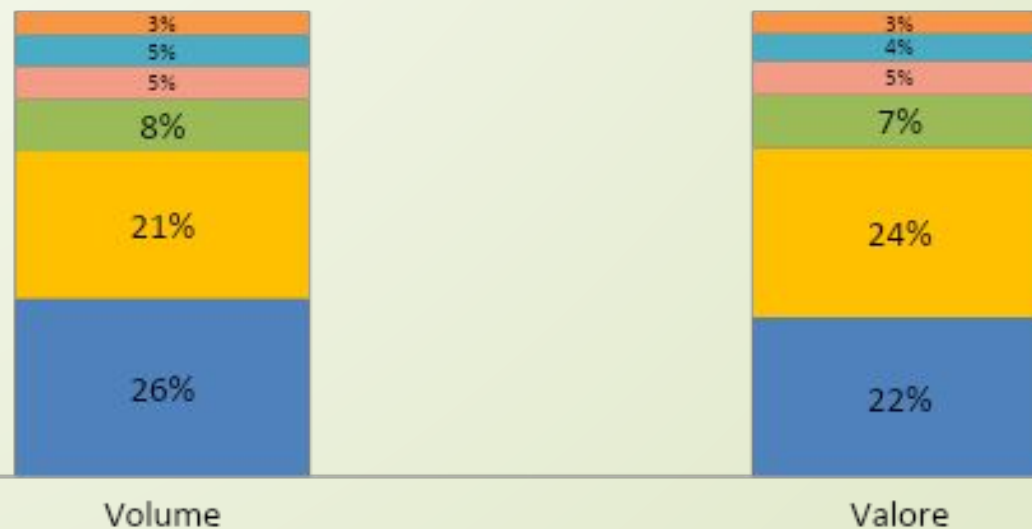


Il miracolo spumanti (e come farlo durare)

Totale export

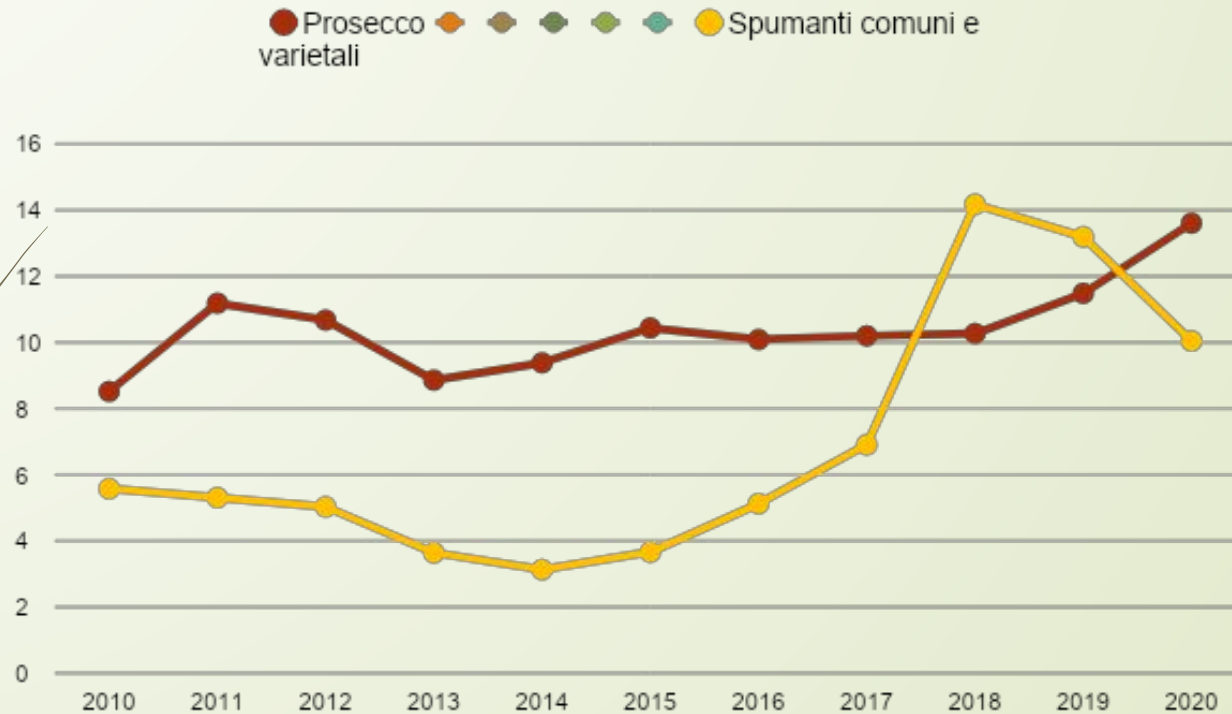


Legend: ■ UK ■ Usa ■ Germania ■ Francia ■ Russia ■ Altri

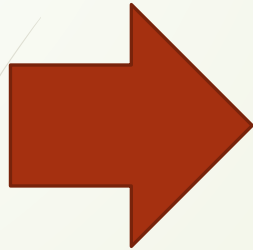


Un esempio di auto-concorrenza

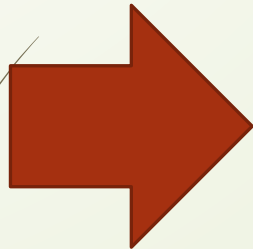
Prosecco e spumanti vari in Germania (milioni di litri)



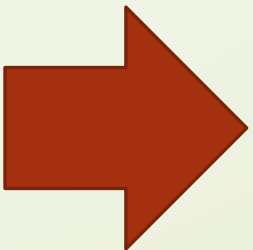
Riassumendo



Prosecco benchmark



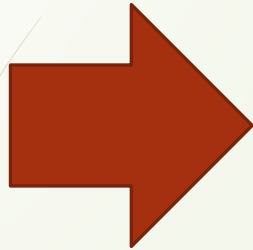
Tensione produttiva in tutto il Paese



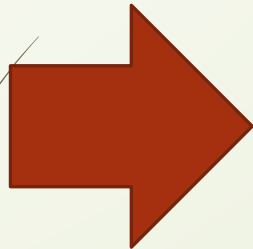
Improvvisazione e cannibalismo



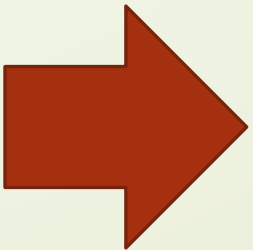
In sintesi



**Non deprimere, ma razionalizzare
e governare la crescita**



**Non aggregare per aggregare,
ma specializzare per distretti e filiere**



**Dotarsi di strumenti previsionali
e di monitoraggio**



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*Una corretta gestione
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Grazie per l'attenzione



OSSERVATORIO
DEL VINO