

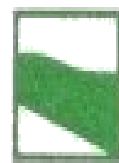
Wine production in Italy



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Cesenatico, 25.09.2014

CRPV Presentation



Regione Emilia-Romagna



Regione Emilia-Romagna

The Emilia-Romagna Region is in the forefront of Agro-industry Research & Development, and the Regional Agriculture Department is the most active in promoting development and innovation actions

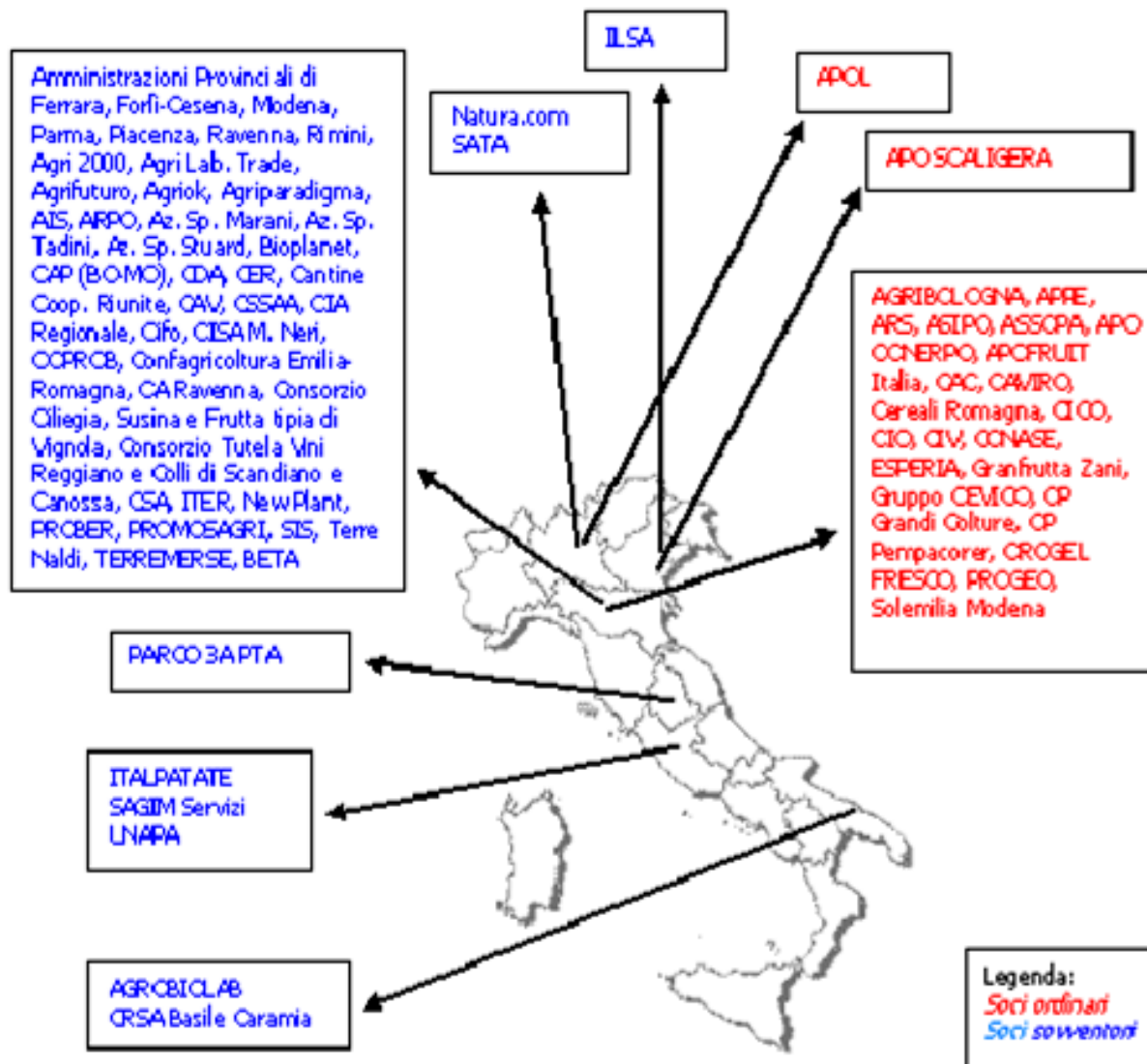
CRPV (Crop Production Research Centre – www.crpv.it) is a cooperative company located in Cesena (Po Valley, Northern Italy), operating in the development of research on crop production and specialized in the promotion and management of scientific investigation



Divisions:

- a) fruit, vegetables, seeds, floriculture;
- b) viticulture, oenology and olive oil;
- c) cereals, beets and oilseed crops;
- d) bio-energy

CRPV SOCIAL MEMBERS



The CRPV **members** are producer associations, institutes for technical assistance and professional education, provincial administrations and the main economic organizations.

ORGANIZATION OF RESEARCH

Mission: to promote, coordinate and manage research and experimental projects on agro-food sector and spread the emerging results to the agricultural production system. The beneficiaries of these projects are the producers and stakeholders of the agro-food sector.

CRPV main activities:

- a) research for sustainable crop protection for both organic and integrated crop production;
- b) genetic improvement and patents (Plant Breeders' Rights) management;
- c) research for production's optimization and integrated production guidelines updating;
- d) application of modern ICT tools in agriculture;
- e) bio-energy development;
- f) economic analyses to support farmers' development;
- g) planning and experimentation about the use of biomasses for bio-energy production;
- h) supporting chain producers in quality and traceability certification process;
- i) dissemination of research results and technologies transfer.

Wine production in Italy and Emilia-Romagna

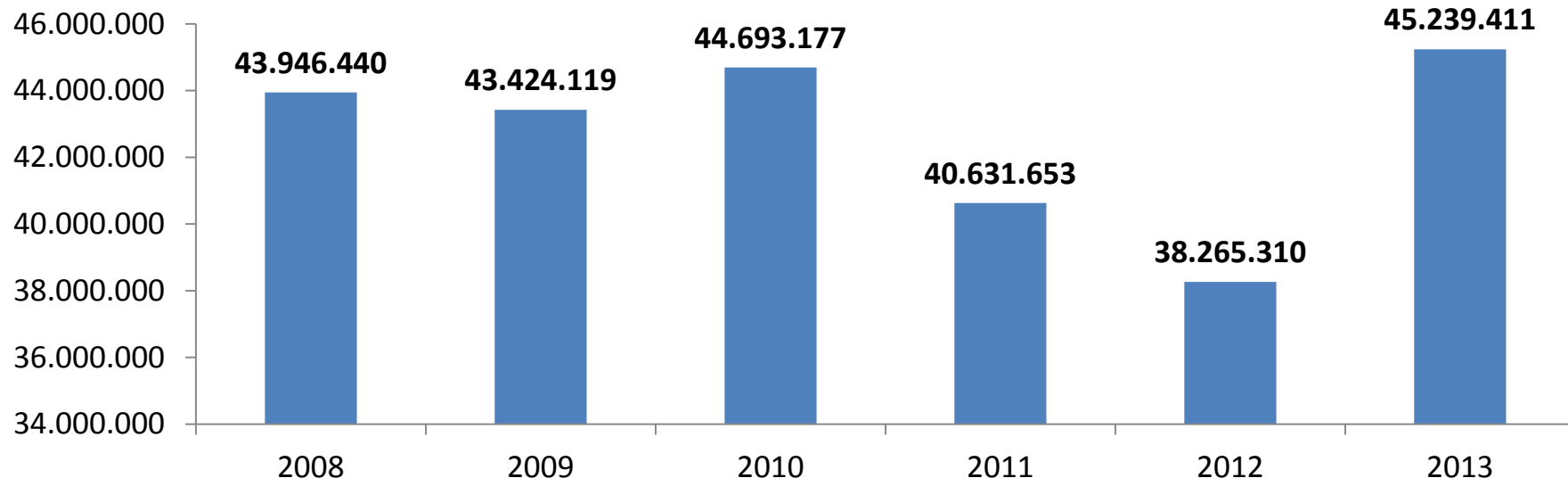
WINE PRODUCTION IN ITALY COMPARED TO THE WORLD, 2012

Grapes area harvested (Ha) (used for wine and table grapes)			Grapes Production (tonnes)			Wine Production (tonnes)		
1	Spain	943,000	1	China	9,600,000	1	France	5,286,414
2	France	760,805	2	USA	6,661,820	2	Italy	4,089,000
3	Italy	696,756	3	Italy	5,819,010	3	Spain	3,150,000
4	China	600,000	4	France	5,338,512	4	USA	2,820,000
5	Turkey	462,296	5	Spain	5,238,300	5	China	1,650,000
6	USA	389,349	6	Turkey	4,275,659	6	Argentina	1,177,800
7	Argentina	220,000	7	Chile	3,200,000	7	Australia	1,155,000
8	Iran	215,000	8	Argentina	2,800,000	8	Chile	1,086,500
9	Chile	204,000	9	Iran	2,150,000	9	South Africa	1,010,000
10	Portugal	179,500	10	South Africa	1,839,030	10	Russian Fed.	700,000

Source: FAO (FAOSTAT), September, 2014

WINE PRODUCTION IN ITALY, HL

Wine production in Italy (hl)



Source: ISTAT (www.agri.istat.it, tab.C26B), September 2014

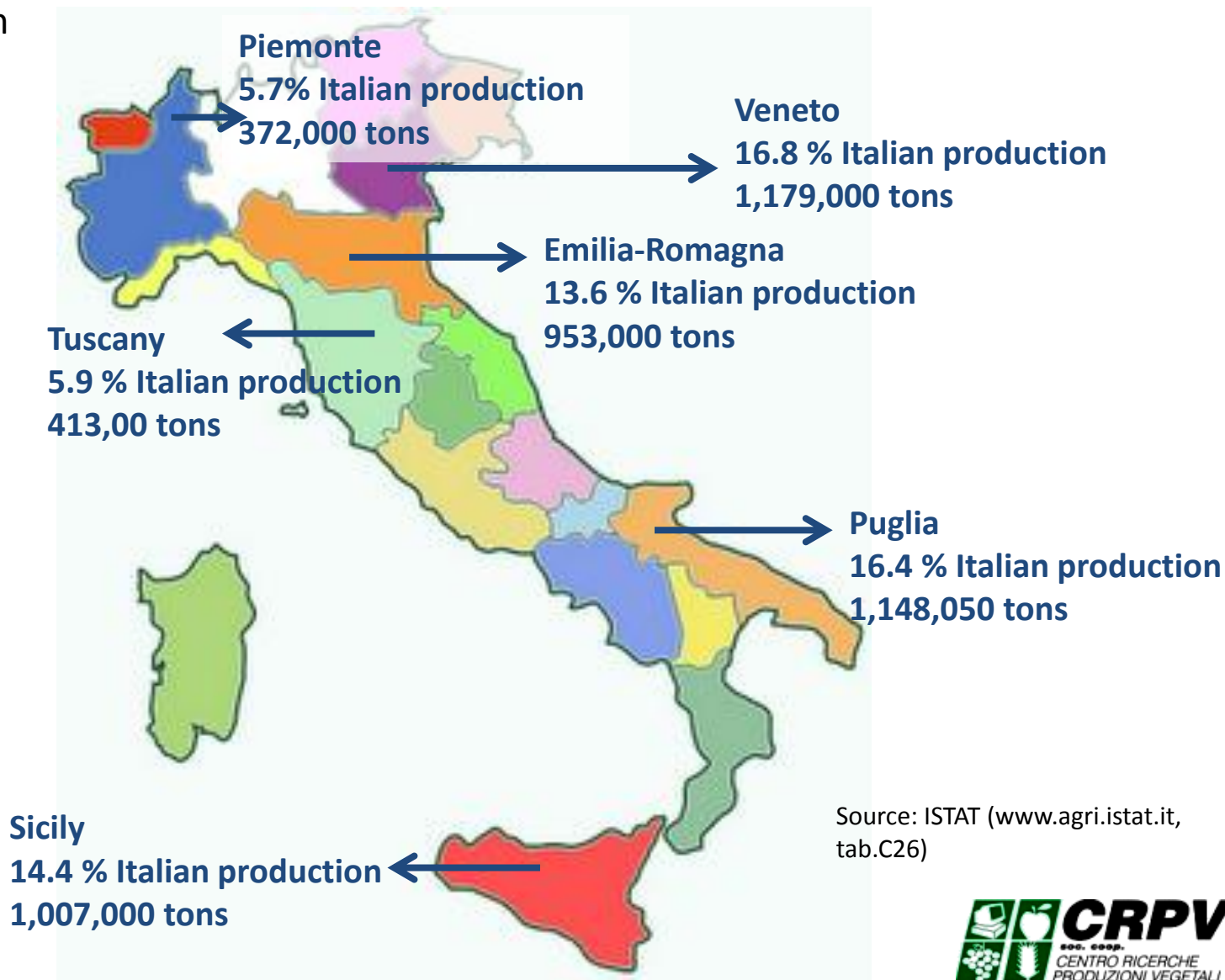
Wine production in 2013	45,2 Mio hl (+18%)
Export 2013	5,039 Mio Euro (+4.1%), 20,242 Hl/1000 (-2.4%)
Import 2013	312 Mio Euro (+5.3%), 2,555 Hl/1000 (+3.3%)
PDO (DOP) wines	405 17,399 (hl/1000) (38% of total) (+8.6)
TGI (IGT) wines	118 15,885 (hl/1000), (35% of total) (+26.6)
Total wine varieties (n.)	453

WINE GRAPES PRODUCTION IN ITALY, 2013

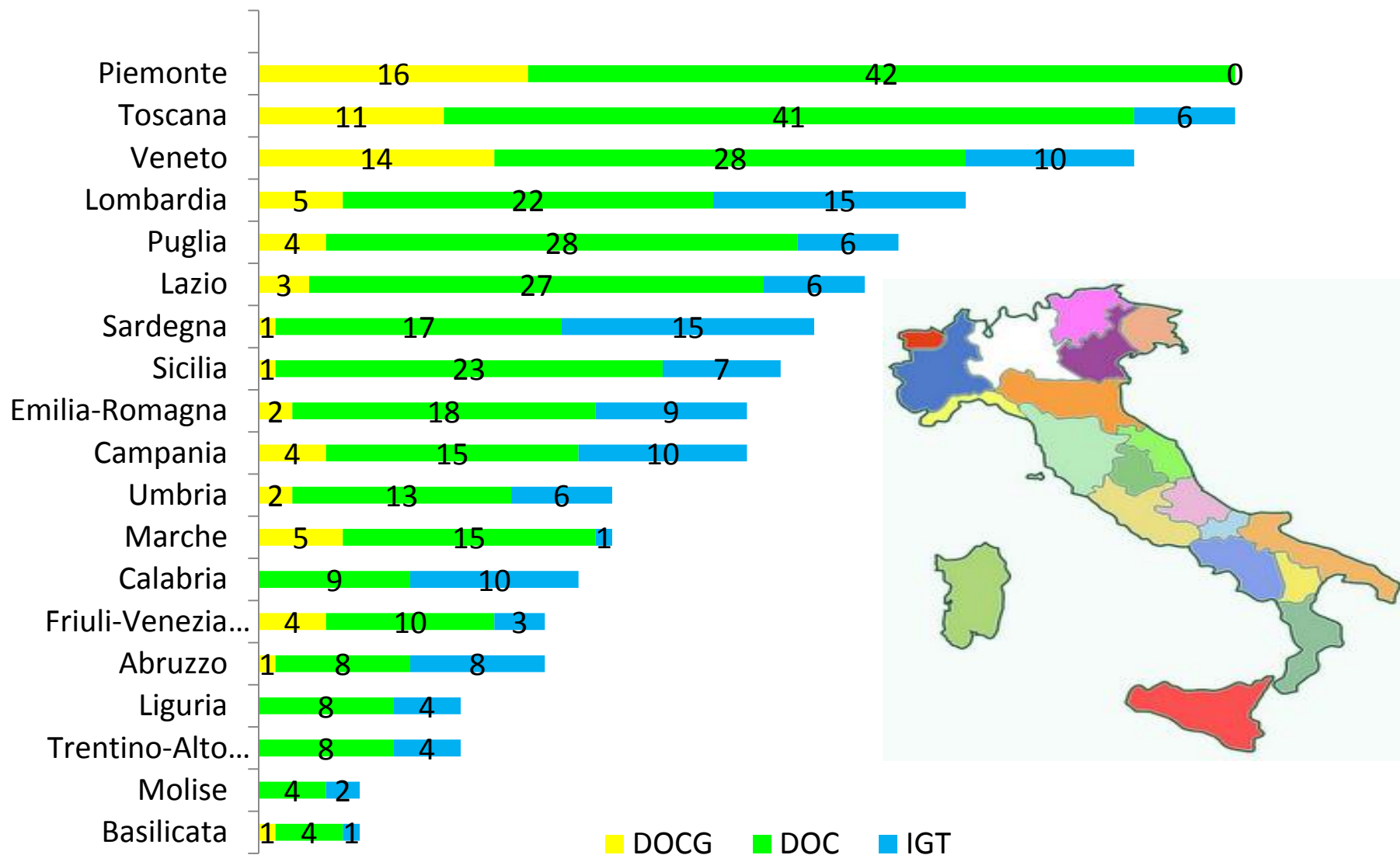
- Italian production is diffused across Italian regions.

- The sum of Veneto, Emilia-Romagna, Puglia and Sicily represents more than 60% of national production.

- Other regions, like Piemonte and Tuscany, produce famous wines in lower amounts



ITALIAN DISTRIBUTION OF DOP AND IGP



WINE PRODUCTION SYSTEM / CHAIN IN ITALY

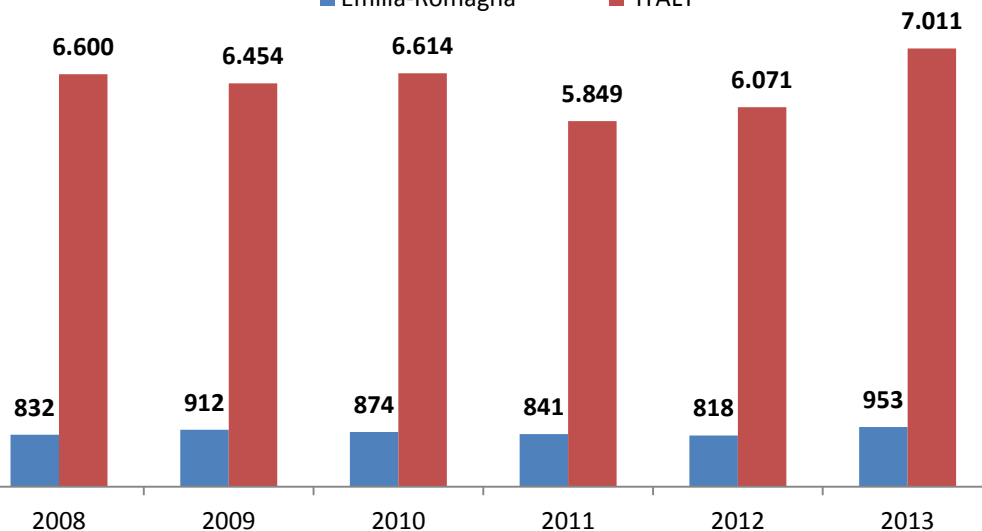
	Strengths	Weakness
Agricultural phase	<ul style="list-style-type: none"> • High varietal differentiation • Favorable soil conformations and climatic situation • Increasing modernization of plants • High professionalism of viticulture • Wide geographical distribution / high production • strong link with the territory • Attention to environment 	<ul style="list-style-type: none"> • High fragmentation of the operators Reduced development of Professional Organizations • Location of major portions of the vineyard in disadvantaged areas
Transformation phase	<ul style="list-style-type: none"> • Increasing vertical integration • Increasing internationalization • Advanced know-how and professionalism of operators 	<ul style="list-style-type: none"> • Poor production and marketing alliances with foreign firms / poor strategic coordination of measures of internationalization • Reduced size compared to large international groups
Chain	<ul style="list-style-type: none"> • Large cooperative system • Gradual change in the composition of production (PDO / TGI) • Major role on the international market 	<ul style="list-style-type: none"> • Reduced development of Interprofessional Organisations • Large numbers of PDO/IGP with difficulty of penetrating the market • Territorial concentration of Consortia (weak presence in the South)

Source: ISMEA, Vino: Scheda, www.ismea.it, 05/08/2014

WINE GRAPES PRODUCTION

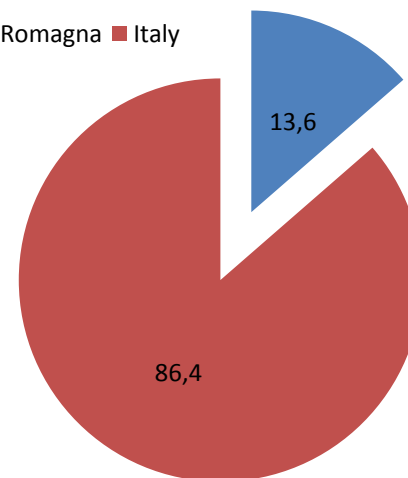
Trend of Italian and Emilia-Romagna grapes production - 2008-2013 period (thousand tonnes)

■ Emilia-Romagna ■ ITALY



Importance of E-R grape production in Italy (year 2013)

■ Emilia Romagna ■ Italy



**Trend of grapes production
(% var. 2013/2012)**

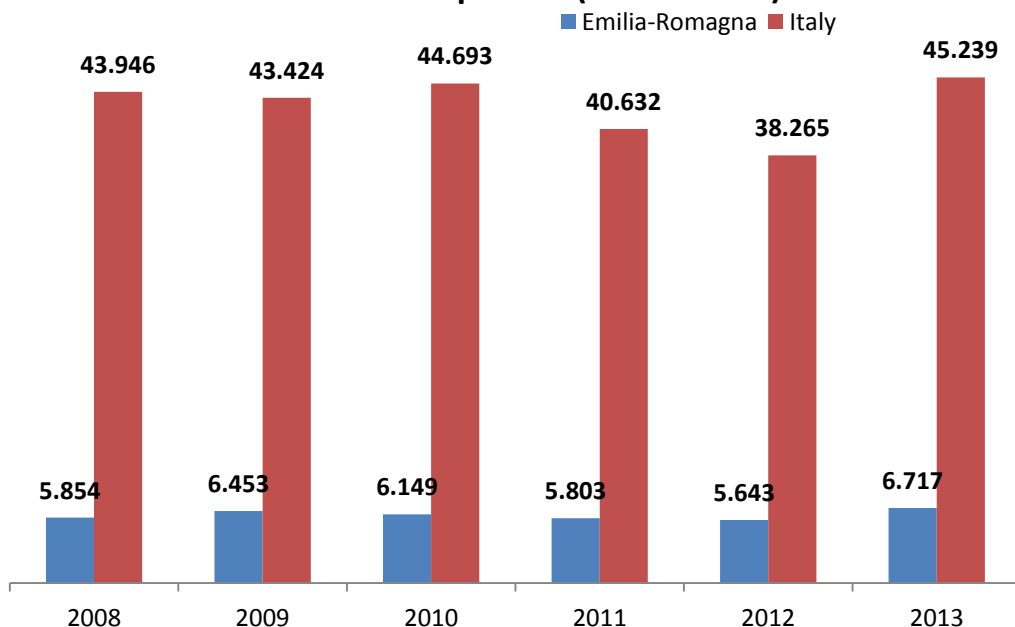
Emilia Romagna	+16.5%
Italy	+15.5%

**Trend of grapes production
(% var. 2013/2008)**

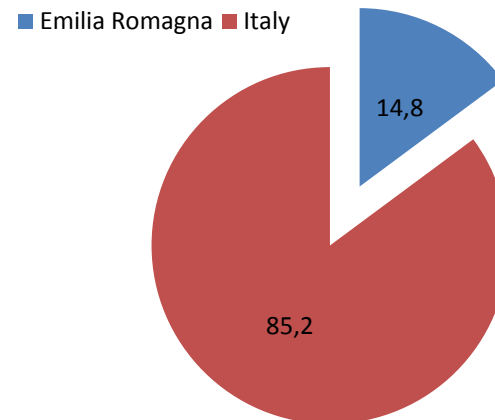
Emilia Romagna	+14.5%
Italy	+6.2%

WINE PRODUCTION

**Trend of Italian and Emilia-Romagna wine production
- 2008-2013 period (thousand hl)**



**Importance of E-R wine production in Italy
(year 2013)**



**Trend of wine production
(% var. 2013/2012)**

Emilia Romagna	+19.0%
Italy	+18.2%

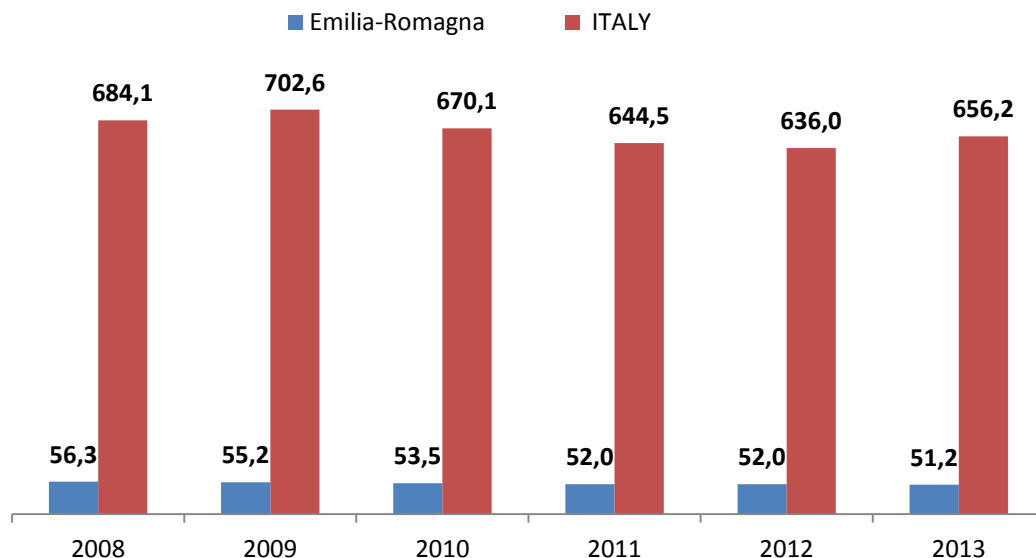
**Trend of wine production
(% var. 2013/2008)**

Emilia Romagna	+14.7%
Italy	+2.9%

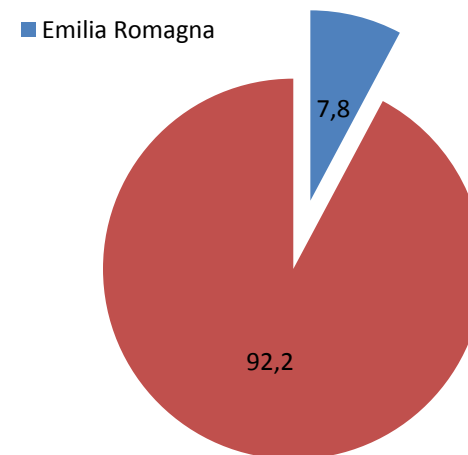
Source: ISTAT (www.agri.istat.it, tab.C26B), September 2014

GRAPES AREA HARVESTED

Trend of Italian and Emilia-Romagna vineyard area - 2008-2013 period (thousand hectares)



Importance of E-R vineyard area in Italy (year 2013)



**Trend of Vineyard area
(% var. 2013/2012)**

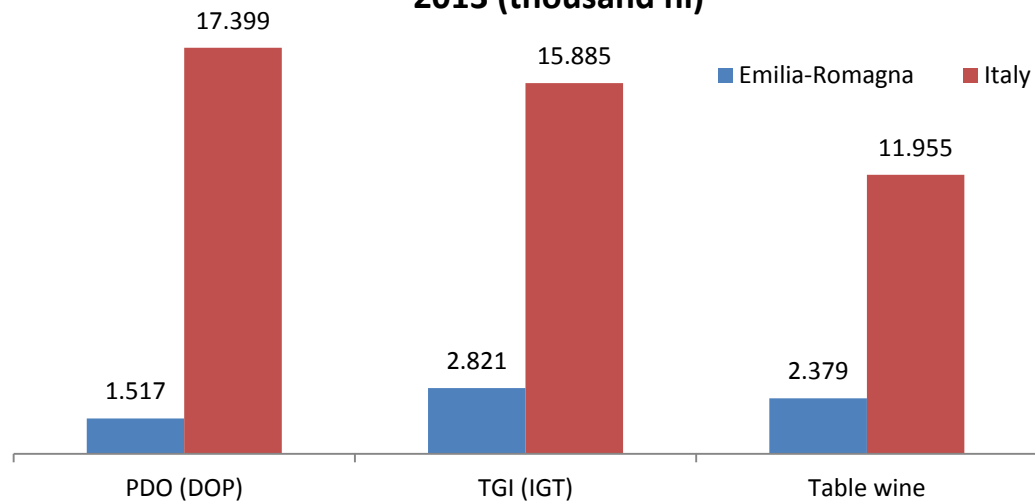
Emilia Romagna	-1.7%
Italy	+3.2%

**Trend of Vineyard area
(% var. 2013/2008)**

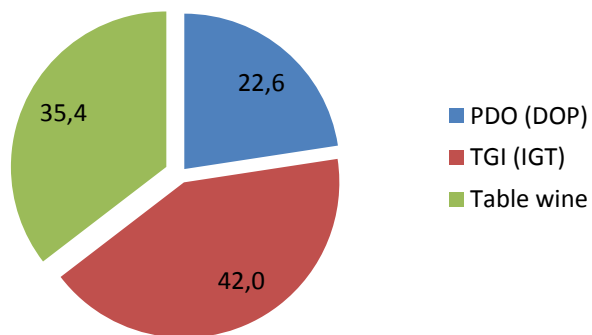
Emilia Romagna	-9.2%
Italy	-4.1%

QUALITY WINE

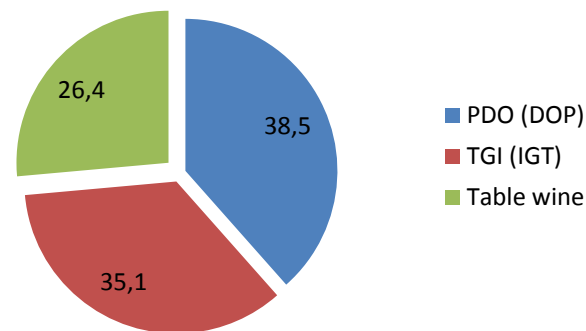
Italian and Emilia Romagna quality wine production in 2013 (thousand hl)



Emilia-Romagna quality wine (2013)

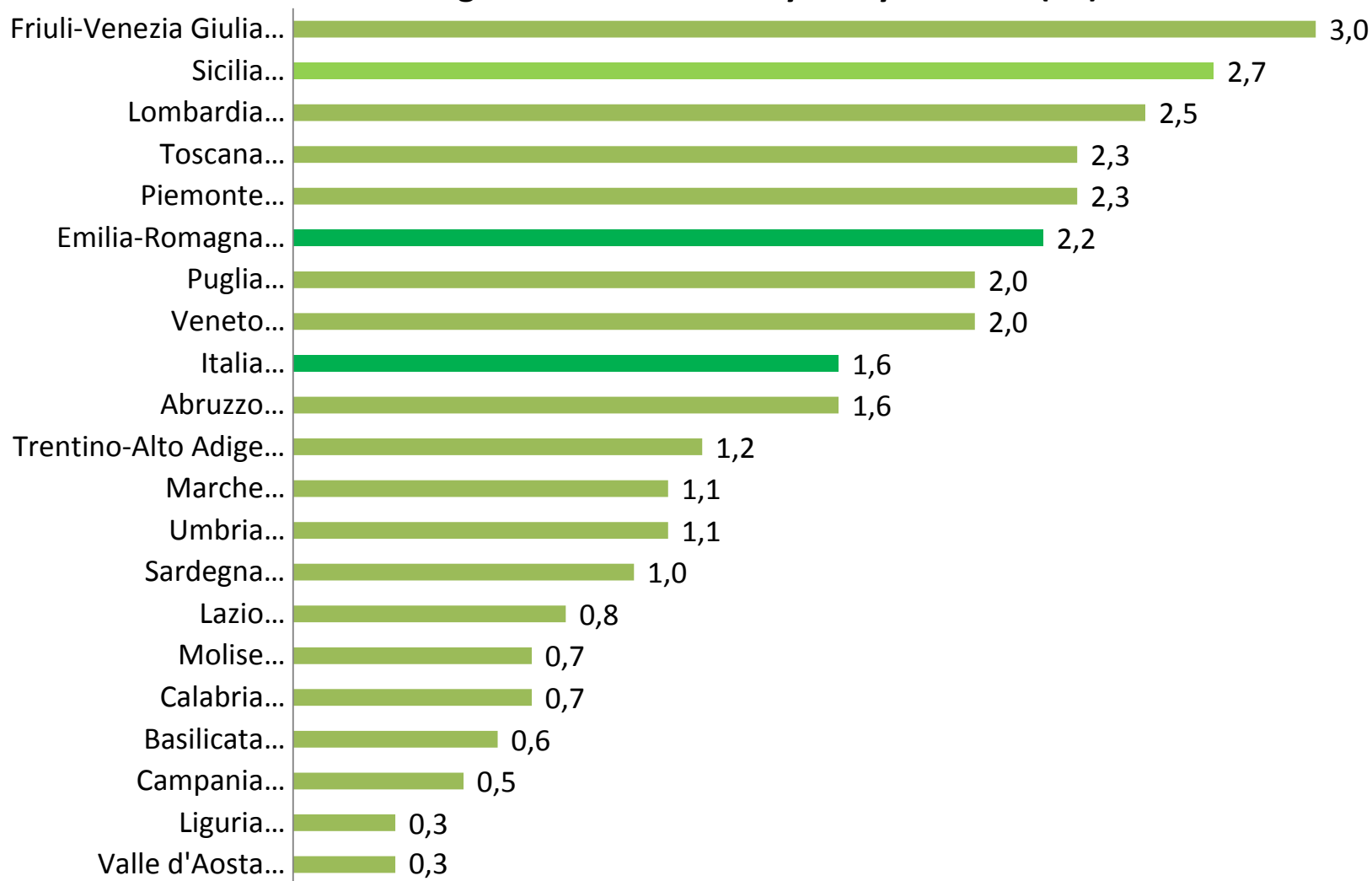


Italian quality wine (2013)



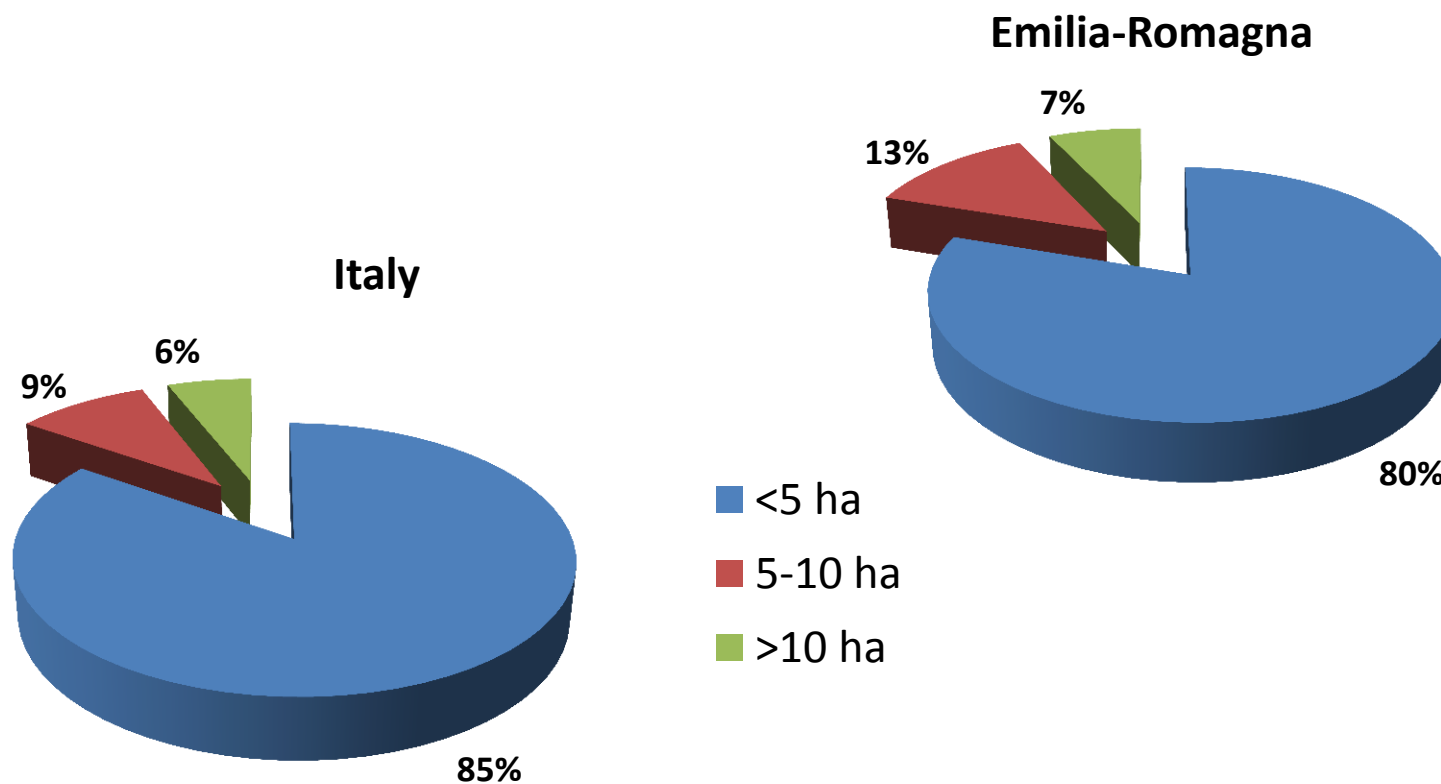
WINE FARMS IN ITALY: A LOOK ON DIMENSIONS

Average size of Italian vineyards year 2010 (ha)



Source: 6° General Census General Agricultural Census (2010)

WINE FARMS IN ITALY: A LOOK ON DIMENSIONS



Source: 6° General Census General Agricultural Census (2010)

TYPICAL FARM IT-5-E

- **Region:** Emilia-Romagna (hill)
- **Size:** 10 ha (5 ha of wine)
- **Variety:** Sangiovese
- **Marketing:** farm sells the harvest directly to the cooperative

CURRENT DEVELOPMENT AND CHALLENGE FOR THE FUTURE

- **Quality improvement (innovative instruments)**
- **Production systems innovation**
- **Valorization of common varieties**
- **Recovering of old vine varieties**
- **Food and wine tourism**