

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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**Date:** 4/18/2016

**GAIN Report Number:** IT1616

## Italy

**Post:** Rome

### Background on the Italian Wine Sector

**Report Categories:**

Wine

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**Report Highlights:**

Italy's 2015 wine production is estimated at 4.7 billion liters, 13.5 percent more than the previous campaign (4.2 billion liters) and 4 percent above the ten-year average, thanks to ideal weather conditions. Reportedly, quality is excellent.

## General Information:

### Background on the Italian Wine Sector

#### Production

Italy's 2015 wine production is estimated at 4.7 billion liters, 13.5 percent more than the previous campaign (4.2 billion liters) and 4 percent above the ten-year average, thanks to ideal weather conditions. A wet winter fostered notable growth, while a warm and dry summer reduced vine disease. Late summer rainfall proved particularly beneficial, favoring an excellent ripening. Wine production increased by 30 percent in Puglia; 25 percent in Sicilia; 15 percent in Veneto, Lazio, Umbria, and Trentino Alto Adige; 10 percent in Friuli Venezia Giulia, Campania, and Marche; 5 percent in Emilia Romagna, Abruzzo, and Sardegna. Production in Piemonte and Lombardia remained flat. Only Tuscany saw a decrease of 5 percent in its wine production. Reportedly, quality is excellent. Approximately one-third of Italy's wine production is Controlled Appellation (D.O.C. and D.O.C.G.). The most popular grape varietals for red wine are Montepulciano, Barbera, Sangiovese, and Merlot. Tocai is the most popular choice for white wine, but also Prosecco, Chardonnay, and Pinot Grigio.

#### Consumption

Wine consumption has been declining in Italy for decades. Causes for the trend include changing lifestyles and tastes, as well as anti-alcohol drinking campaigns. Per capita wine consumption is forecasted at 36 liters for 2015, considerably lower than 110 liters in the 70s. Recent wine consumer surveys show that Italian origin and familiarity with the winery are the main elements in determining consumer choice. Despite economic austerity measures, Italian wine consumers are seeking higher quality wines, but still in the modest price range.

#### Trade

Italy's wine exports remained stable at 2 billion liters, valued at \$6 billion in 2015. The United States (\$1.4 billion), Germany (\$1.1 billion), and the United Kingdom (\$824 million) are key markets. The top Italian wines consumed in the United States are Pinot Grigio, Prosecco, Spumante, Moscato, and Lambrusco. Italy's wine imports reached 272 million liters valued at \$351 million in 2015, mainly from France (\$177 million), Spain (\$73 million), and the United States (\$46 million).

**Table 1: Italy's leading wine exports**

Year Ending: December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	L	6,655,572,292	2,005,956,023	6,733,547,247	2,021,586,927	5,929,320,463	1,985,316,952
United States	L	1,412,648,558	290,591,853	1,473,987,507	292,604,218	1,401,754,375	313,113,320
Germany	L	1,350,048,600	586,434,324	1,290,261,235	587,783,079	1,062,187,558	548,668,532

United Kingdom	L	821,044,657	290,435,411	868,388,920	296,183,801	824,171,341	322,223,211
Switzerland	L	414,970,939	66,750,473	420,746,925	70,340,403	357,378,602	68,254,354
Canada	L	371,990,959	68,816,119	365,394,830	68,367,110	332,254,766	69,875,886
Japan	L	203,845,374	42,369,942	201,671,924	42,832,173	173,374,283	42,963,915
Sweden	L	186,859,859	46,883,102	190,730,516	47,705,243	164,931,187	46,212,387
Denmark	L	176,909,745	39,403,874	186,349,455	41,582,789	160,474,863	40,391,374
France	L	183,885,566	84,690,214	171,845,698	83,864,880	157,110,327	85,324,324
Netherlands	L	154,959,822	44,343,005	159,338,217	43,625,575	142,491,766	43,458,571
Belgium	L	121,702,387	28,127,510	133,074,775	29,664,340	118,643,143	30,454,558
Norway	L	115,456,183	23,154,478	127,187,231	25,737,923	105,117,554	24,397,172
Austria	L	133,976,519	50,644,306	129,655,392	50,510,448	100,749,493	45,138,221
China	L	97,850,106	21,507,238	98,538,931	25,212,405	96,198,885	26,269,742
Russia	L	152,799,437	43,876,124	135,210,958	40,758,700	78,942,280	29,285,171
Spain	L	51,956,522	20,854,223	53,309,512	23,269,697	45,076,050	22,514,855
Australia	L	44,780,836	8,348,322	50,035,519	9,107,262	44,614,168	9,533,752
Poland	L	40,664,263	13,953,016	49,172,313	17,099,123	41,430,516	15,850,520
Czech Republic	L	45,124,169	28,640,142	42,748,757	29,586,679	37,259,090	27,009,536
Ireland	L	38,598,681	11,423,170	39,826,719	12,024,793	35,346,048	12,436,988

Source: Global Trade Atlas

**Table 2: Italy's leading wine imports**

Year Ending: December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	L	415,889,788	256,105,473	381,015,571	254,834,965	351,403,214	271,748,961
France	L	185,774,852	22,563,675	192,064,257	18,794,275	177,347,540	18,104,272
Spain	L	112,183,408	148,431,714	77,795,683	164,314,333	72,881,895	179,428,817
United States	L	61,358,033	45,423,014	59,923,394	47,294,586	45,733,178	41,094,055

Australia	L	4,886,632	3,562,003	12,305,542	9,814,330	17,117,673	16,210,850
Germany	L	7,802,093	2,822,174	13,879,950	5,896,974	14,024,127	7,010,012
Portugal	L	8,658,647	3,059,048	7,965,663	1,828,035	6,358,651	1,653,379
Austria	L	2,722,132	1,430,194	2,351,396	1,397,042	2,250,842	1,593,205
Slovenia	L	974,334	445,002	1,076,446	287,572	1,940,336	824,899
Hungary	L	1,317,202	869,714	1,618,681	1,430,838	1,557,786	1,358,391
Switzerland	L	958,727	118,066	1,008,472	66,097	1,433,865	96,410
Netherlands	L	2,153,922	107,788	1,339,458	470,500	1,244,068	111,808
New Zealand	L	196,456	27,956	808,419	191,404	1,125,004	375,092
Chile	L	3,447,817	2,718,040	973,734	315,588	1,121,096	908,150
Romania	L	1,021,408	526,223	1,062,941	487,281	1,106,548	569,842
United Kingdom	L	2,840,736	344,437	1,134,015	64,971	1,041,291	199,693
South Africa	L	13,878,297	19,243,969	897,882	753,455	847,265	1,150,365
Argentina	L	799,156	234,180	934,044	255,176	799,941	212,171
Slovakia	L	-	-	100,657	1,344	582,889	155,631
Israel	L	365,581	59,646	587,051	81,776	456,672	76,454
Greece	L	1,512,382	1,017,782	615,165	500,471	354,044	125,885

Source: Global Trade Atlas