



*IV*

*Summer School Sanguis Jovis*

*Montalcino*

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**Area 8 countries, 13.200.000km<sup>2</sup> (W148.000.000)**  
9%

**Populations 3.000.000.000 ( W 7.500.000.000)**  
40%



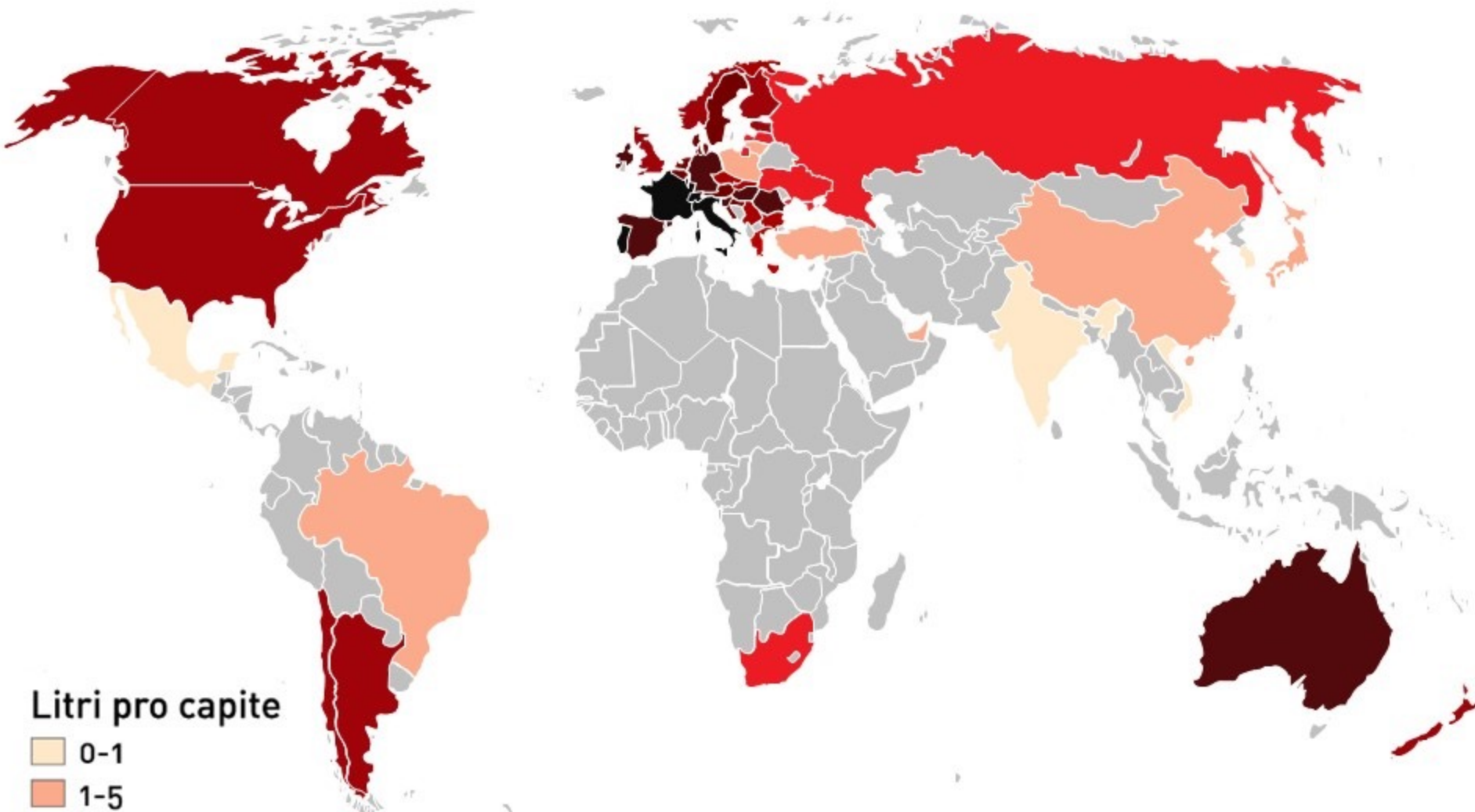
**GDP 25 Tril US\$ (W 85 Tril US\$)**  
30%

**9% World Wine Consumption**

**Per Capita Wine Consumption 0.9L ( W 3.5L)**



# I consumi pro capite di vino nel mondo (2018)



Litri pro capite

- 0-1
- 1-5
- 5-10
- 10-20
- 20-30
- > 30

Fonte:



su dati OIV, Global Data, UN

## Export in Value 2020

Japan 154 Mil Euro  
China 98 Mil Euro  
Hong Kong 22 Mil Euro  
Korea 41 Mil Euro  
Taiwan 13 Mil Euro  
India 3 Mil Euro

## Market Share 2020

Japan 14% N3  
Korea 15% N4  
China 6.5% N4  
Hong Kong 3 % N6  
Taiwan 10% N3  
India 12% N3

## 2019Vs2020

Japan -15% (182 Mil)  
Korea +30% (33 Mil)  
China -26% (134 Mil)  
Hong Kong -10% (22 Mil)  
Taiwan +15 % (15 Mil)

## Italy VS Tot Imports

Italy 330Mil \$  
Tot Imp 4.5 Bil \$

NE Asia Italy 7.5%  
World Italy 22%

# Market Opportunities and Threats



- Market is growing
- Low pro capita consumption
- Wine is an aspirational products
- Popularity of the Italian wines the world
- Low market share of the Italian wines
- Popularity of the Made in Italy



- Market not stable
- Currency exchange
- No wine tradition in the diet
- Protective policy
- Very high mark up
- Specially in Great China no strong perception of the Italian wines

## Importazioni di vino in Cina 2003-2010 - totale

| USD m     | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|-----------|------|------|------|------|------|------|------|------|
| Total     | 33   | 53   | 75   | 139  | 258  | 381  | 452  | 800  |
| France    | 8    | 14   | 22   | 39   | 98   | 150  | 195  | 369  |
| Australia | 3    | 6    | 11   | 27   | 45   | 59   | 96   | 149  |
| Chile     | 16   | 20   | 13   | 21   | 47   | 57   | 54   | 77   |
| Italy     | 1    | 3    | 4    | 12   | 20   | 27   | 25   | 49   |
| Spain     | 1    | 2    | 13   | 20   | 17   | 19   | 16   | 48   |
| USA       | 2    | 4    | 4    | 7    | 11   | 19   | 26   | 37   |
| Germany   | 1    | 1    | 2    | 3    | 5    | 9    | 8    | 14   |
| Argentina | 1    | 1    | 3    | 4    | 3    | 19   | 7    | 10   |
| Other     | 0    | 2    | 3    | 6    | 12   | 22   | 25   | 48   |

### Importazioni di vino Cina - valore

| (EUR m)     | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 20/19 | 20/15 an |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|----------|
| Totale      | 1,132 | 1,836 | 2,143 | 2,476 | 2,418 | 2,185 | 1,603 | -27%  | -3%      |
| Australia   | 191   | 408   | 518   | 644   | 661   | 774   | 625   | -19%  | 9%       |
| France      | 490   | 813   | 904   | 977   | 904   | 628   | 447   | -29%  | -11%     |
| Chile       | 125   | 210   | 243   | 291   | 319   | 309   | 194   | -37%  | -2%      |
| Italy       | 78    | 91    | 120   | 143   | 143   | 140   | 101   | -28%  | 2%       |
| Spain       | 83    | 117   | 144   | 172   | 143   | 130   | 86    | -34%  | -6%      |
| USA         | 55    | 52    | 54    | 72    | 64    | 34    | 20    | -41%  | -17%     |
| Argentina   | 14    | 18    | 21    | 20    | 22    | 24    | 25    | 2%    | 6%       |
| Portugal    | 11    | 15    | 18    | 21    | 21    | 22    | 15    | -31%  | 0%       |
| New Zealand | 18    | 17    | 19    | 26    | 24    | 19    | 16    | -14%  | -1%      |
| Germany     | 16    | 17    | 16    | 19    | 22    | 20    | 18    | -9%   | 1%       |
| Others      | 50    | 78    | 85    | 92    | 93    | 84    | 56    | -34%  | -6%      |

fonte: I numeri del vino su dati UN Comtrade e China Customs