

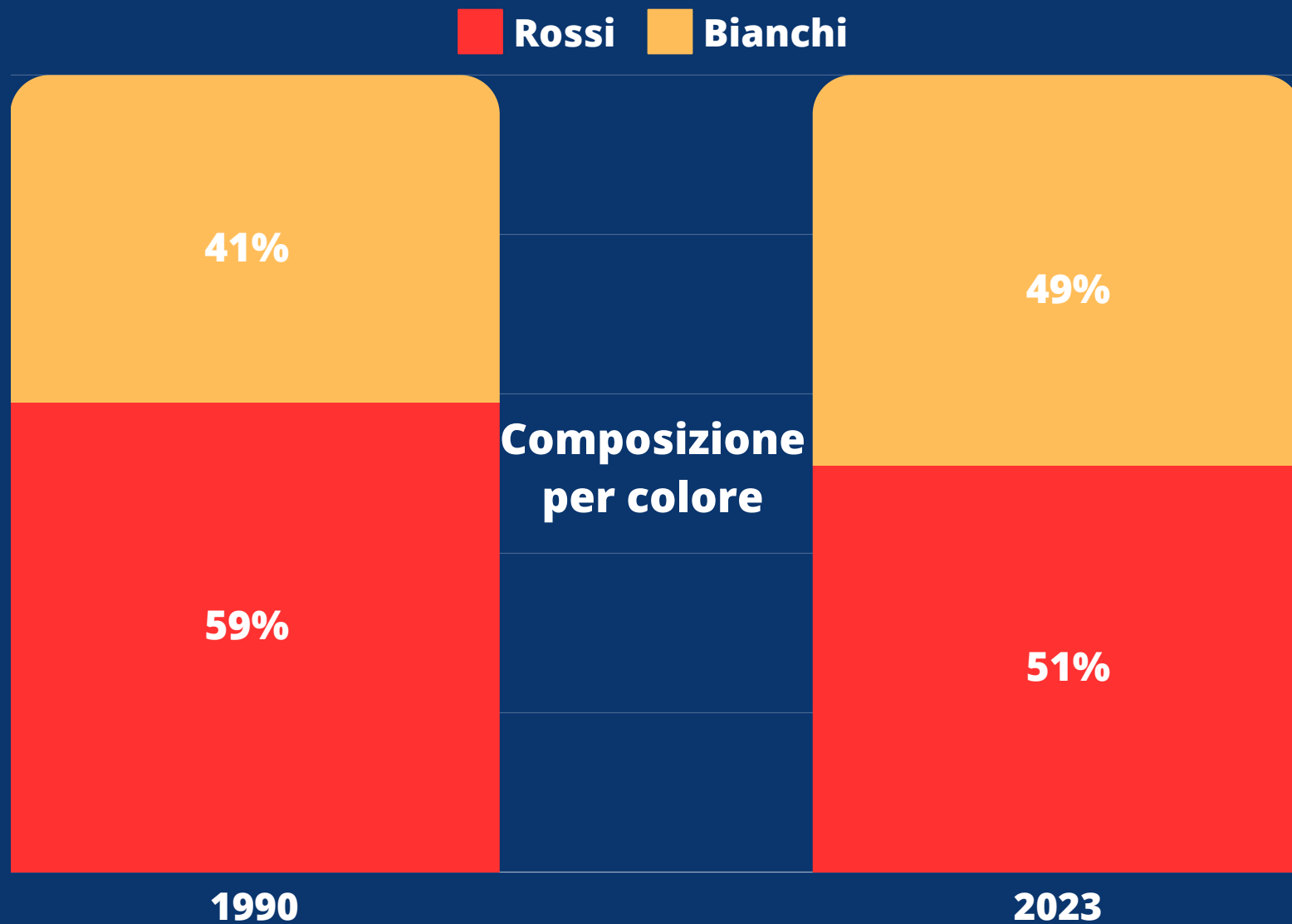
# **Situazione attuale e prospettive del settore vitivinicolo italiano**

**Lamberto Frescobaldi**  
*Presidente di Unione Italiana Vini*

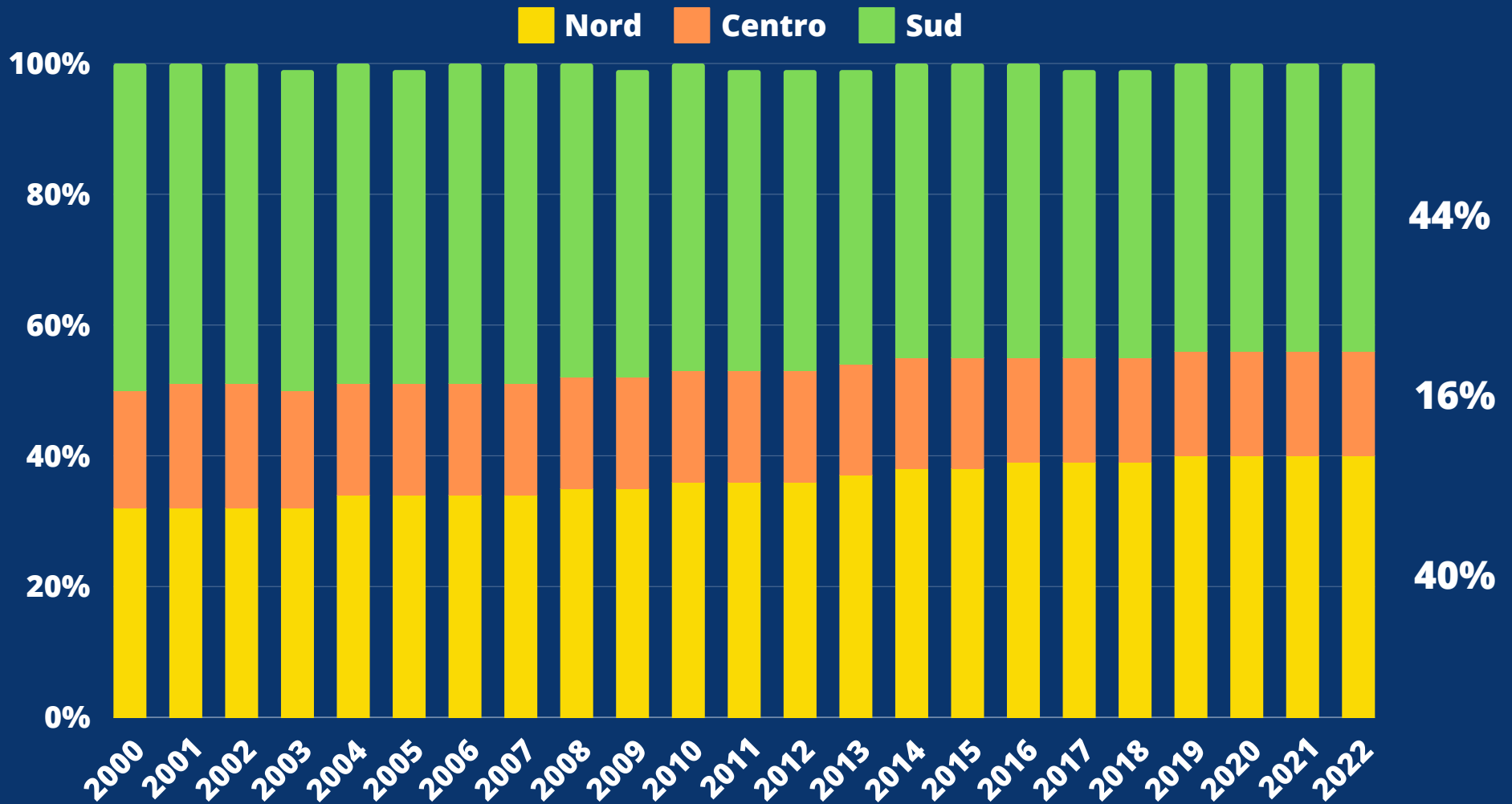
**Parte prima**

**I grandi cambiamenti  
Dal vigneto allo scaffale**

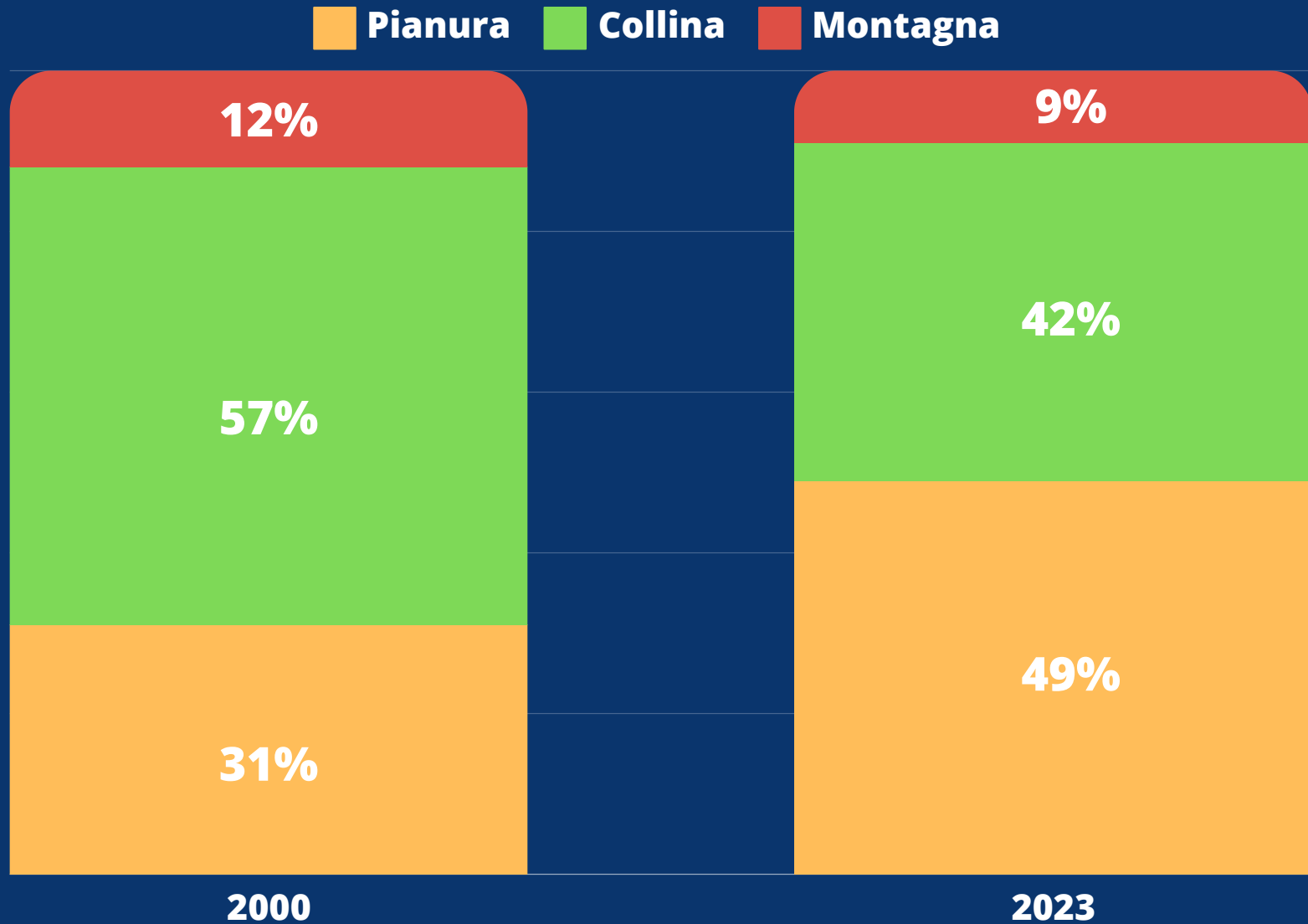
# Il cambio di pelle in vigneto



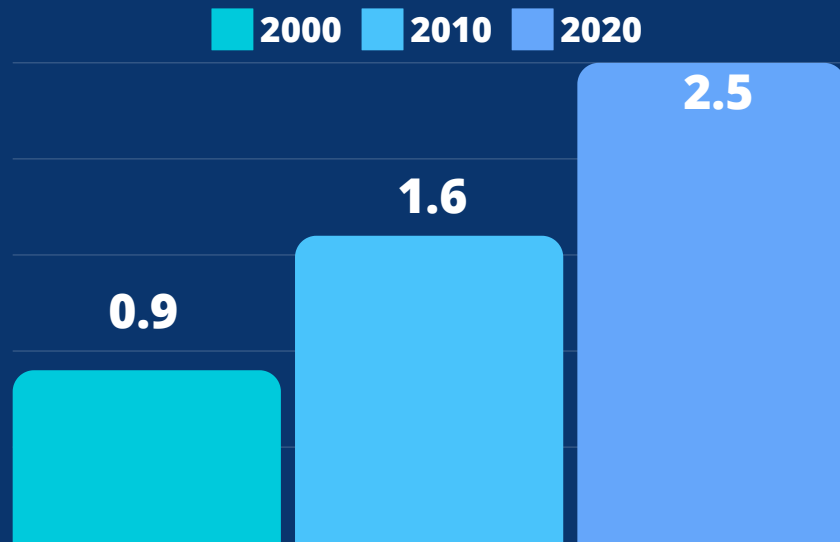
# La migrazione dei vigneti verso Nord...



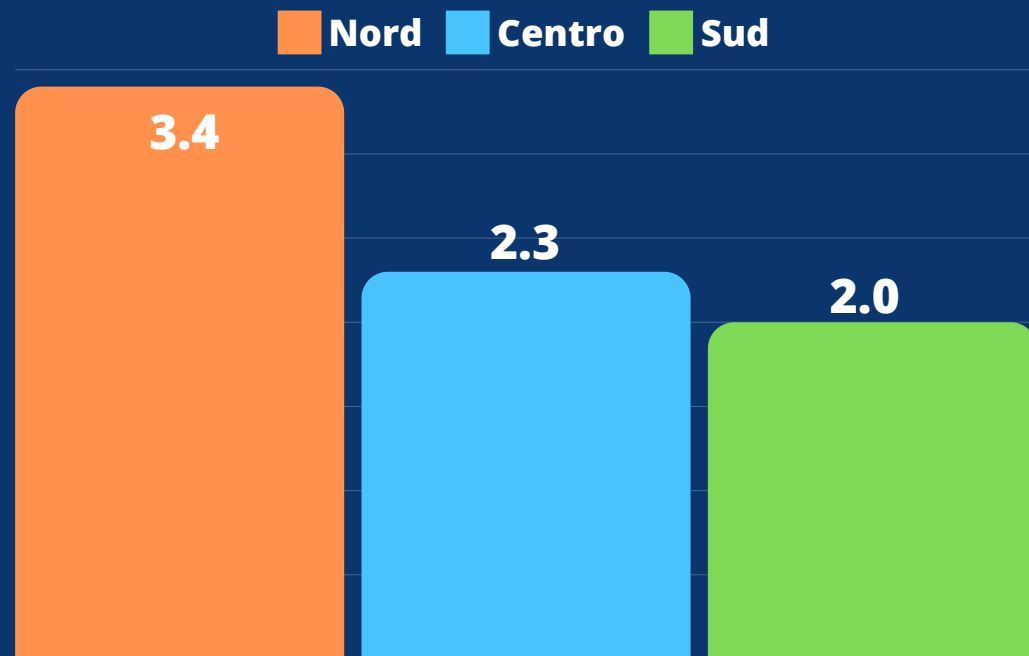
# ... e la discesa verso la pianura



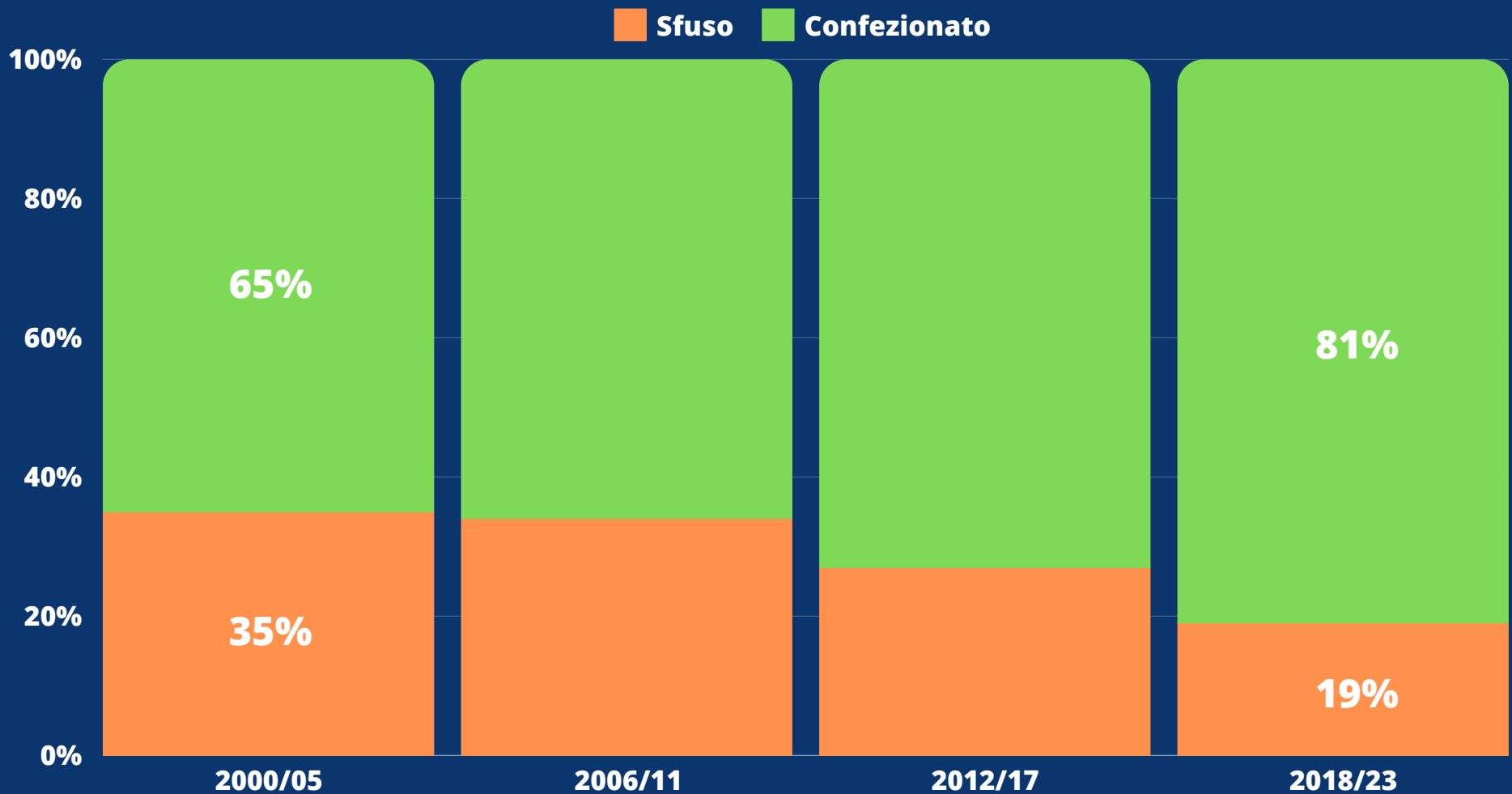
# Aziende (un po') più grandi



Ettrato medio  
per azienda  
*Censimento Agricoltura Istat 2021*



# Un export sempre meno conto terzi

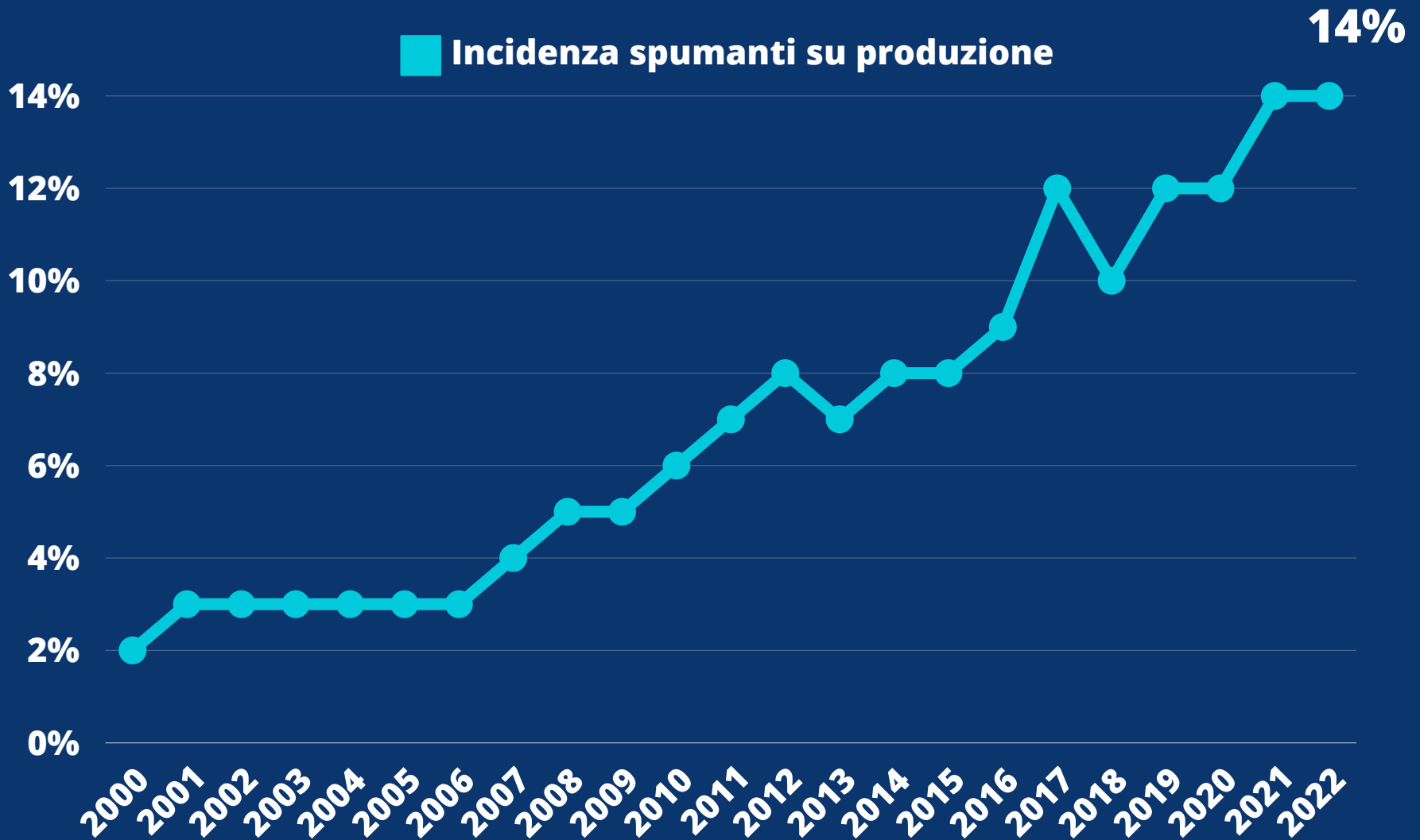


**Parte seconda**

**Il nuovo volto dell'Italia**



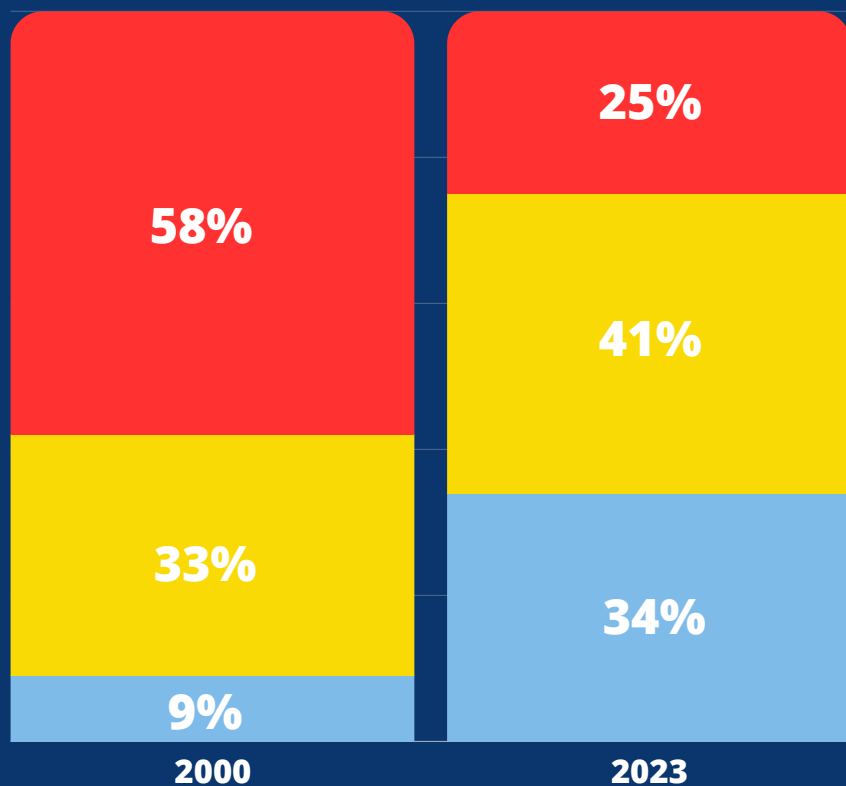
# Italia Sparkling Country



# Dal rosso alle bollicine

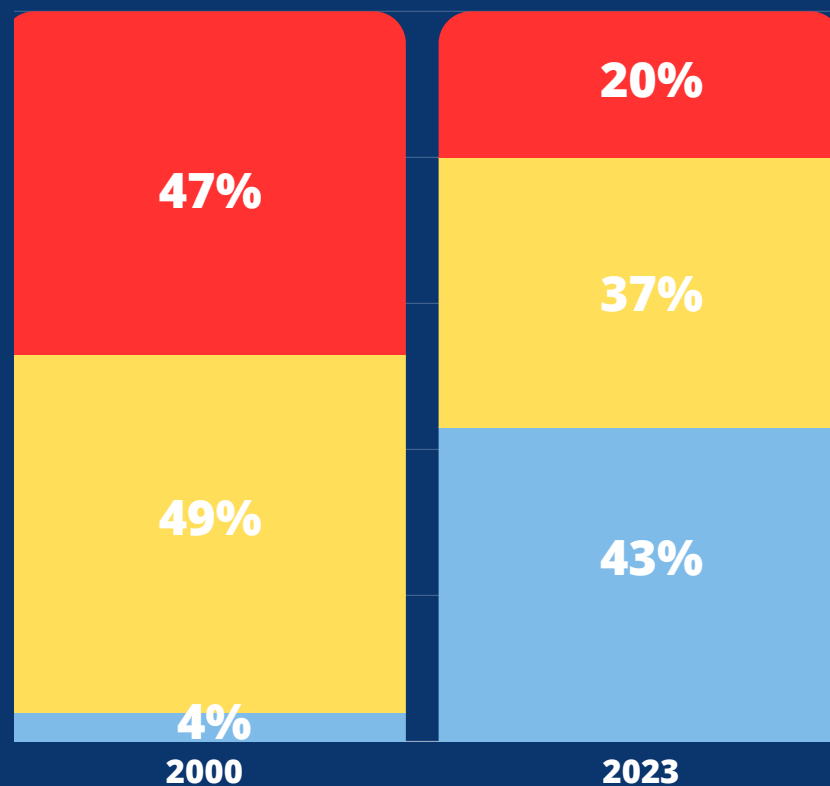
## Export verso USA

■ Spumanti ■ Bianchi ■ Rossi

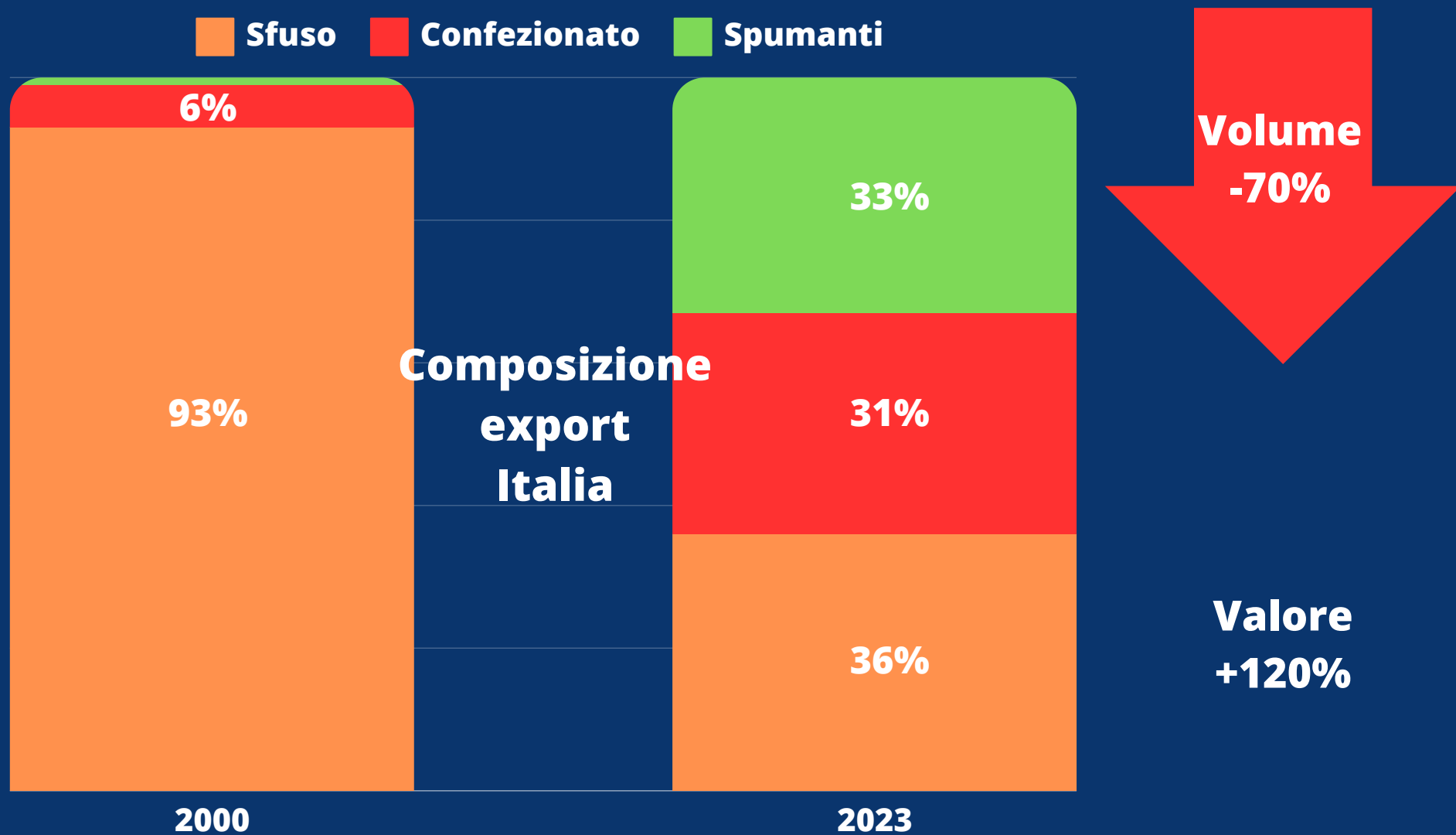


## Export verso UK

■ Spumanti ■ Bianchi ■ Rossi



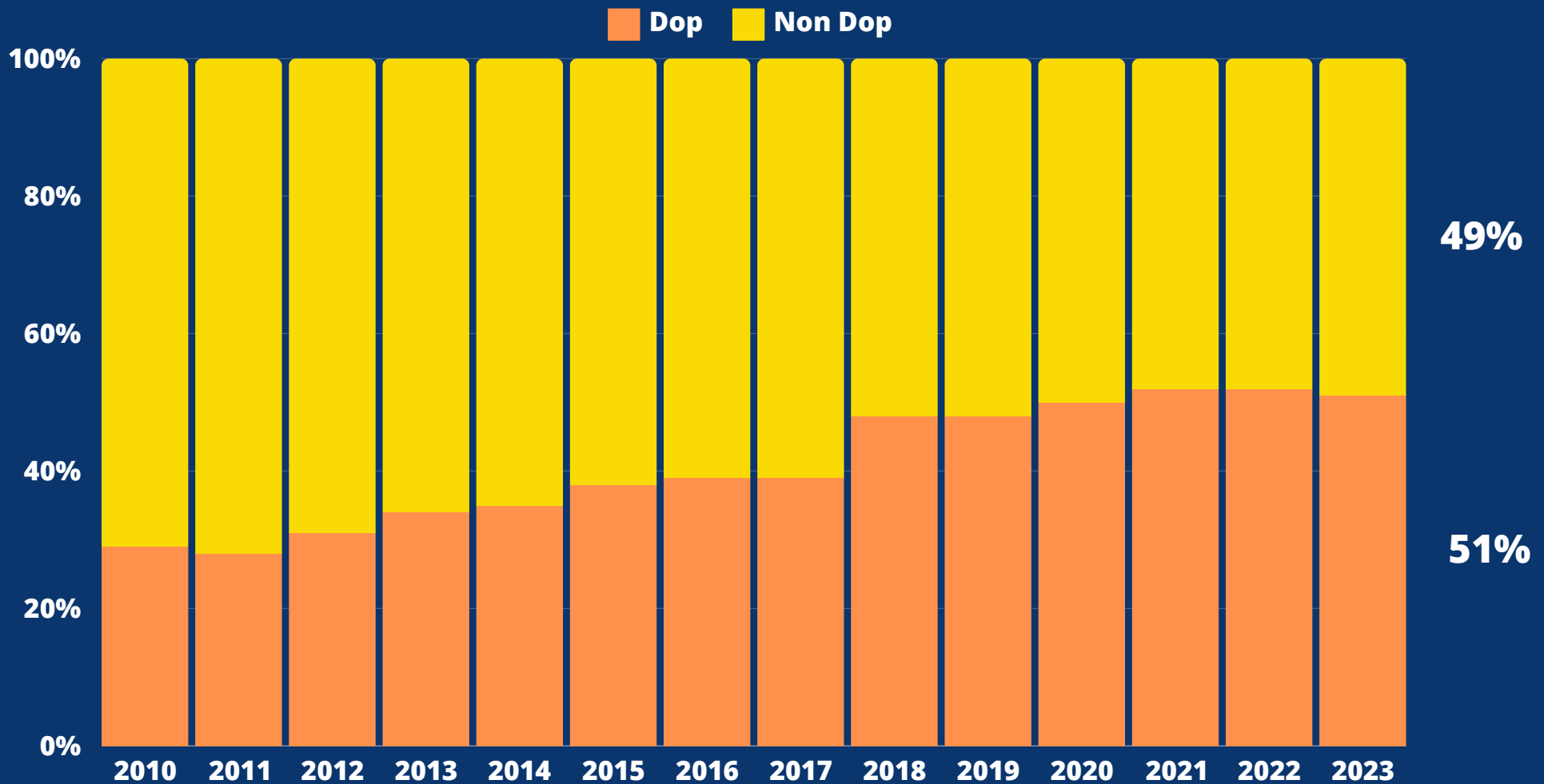
# La metamorfosi dell'Italia in Francia



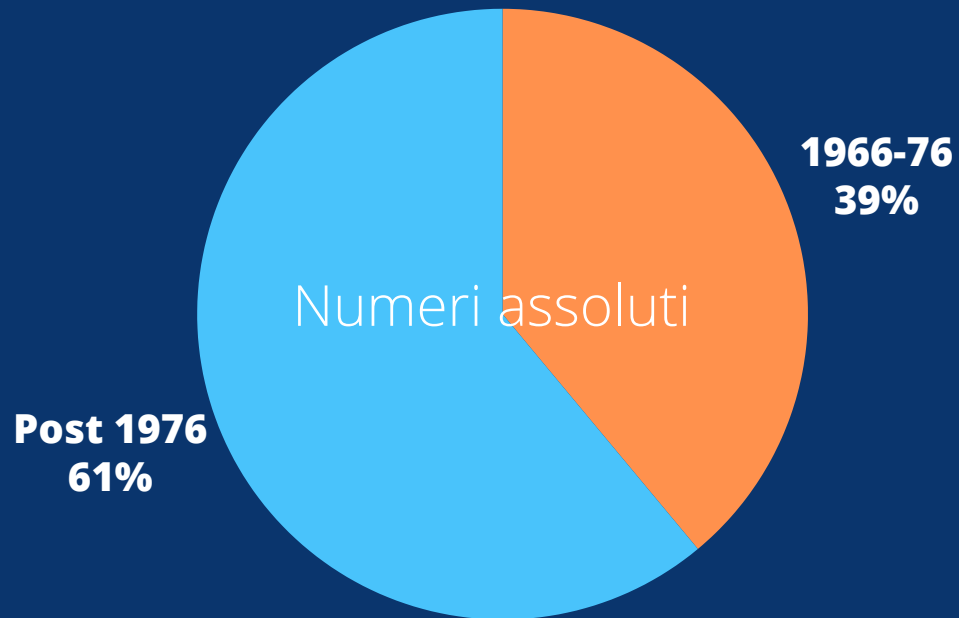
**Parte terza**

**A tutta DOP  
(anche troppo)**

# La qualificazione dell'offerta export

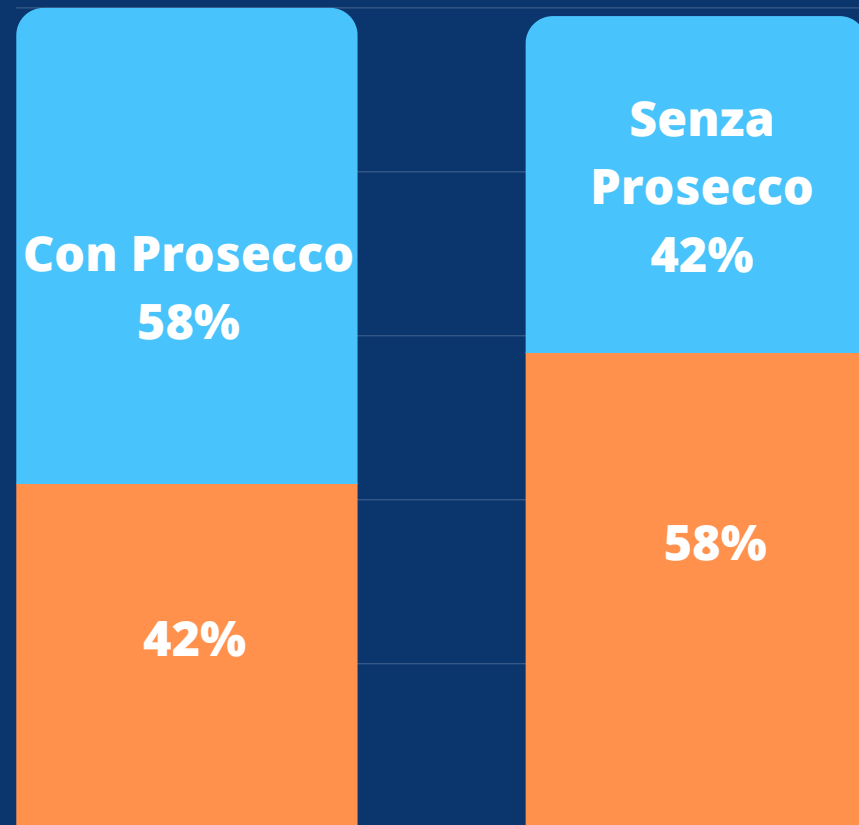


# Le DOP per anagrafe: vecchie, ma buone

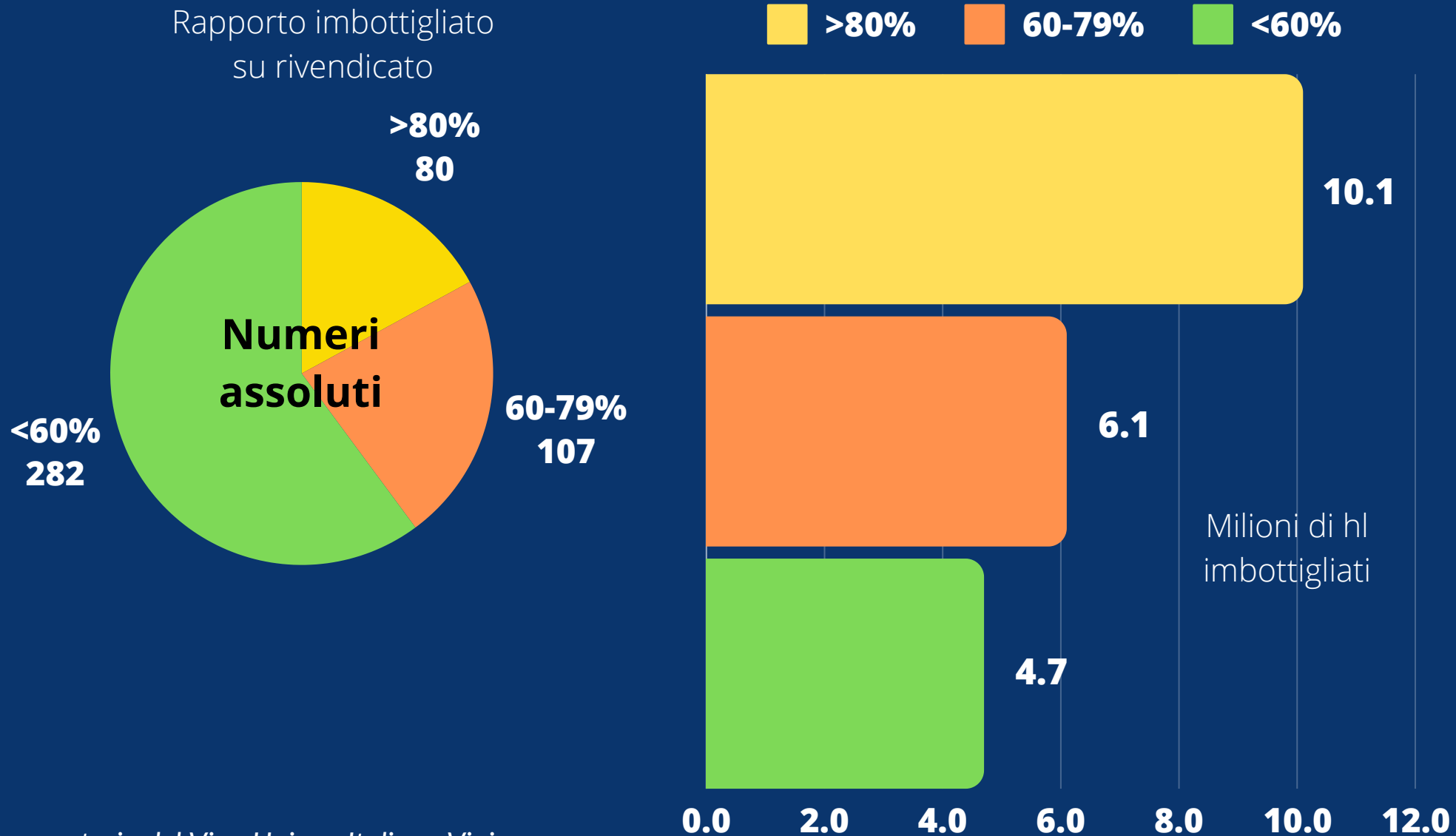


Imbottigliamenti

1966-76 Post 1976



# Il futuro? Meno, ma più riconoscibili

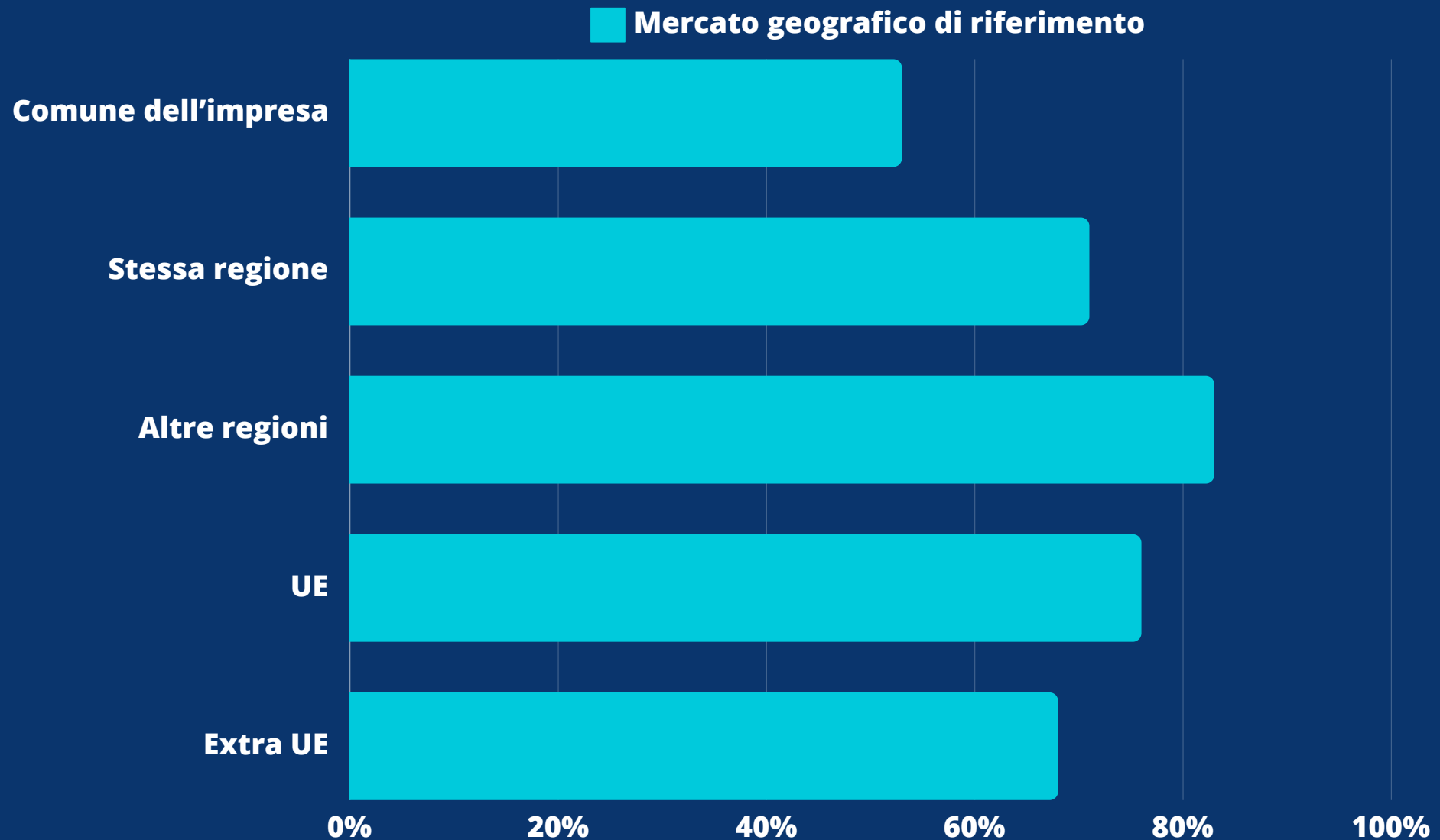


# **Parte quarta**

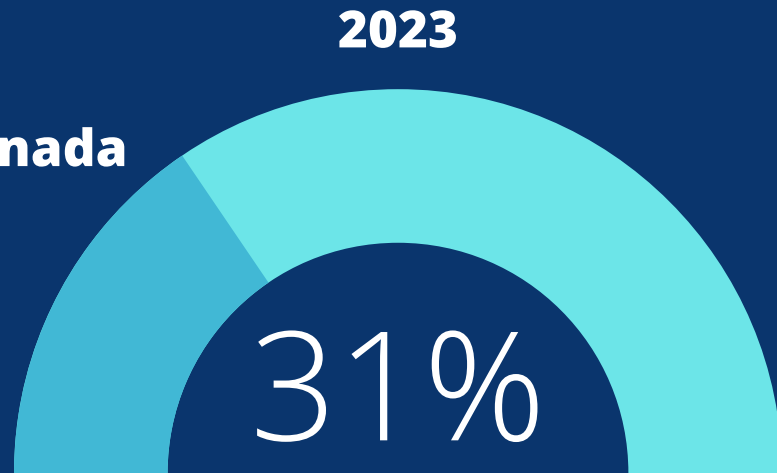
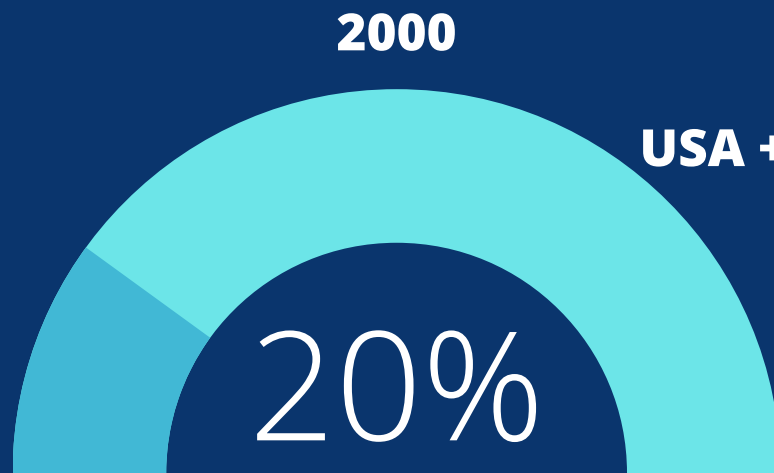
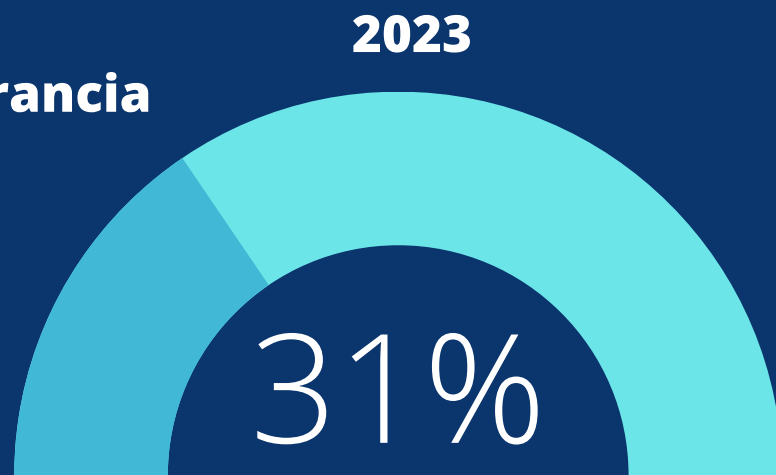
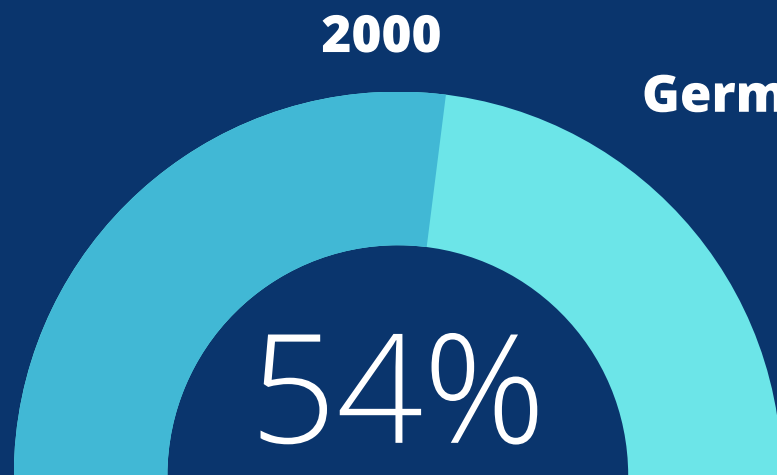
**Innovativi nel prodotto**  
**Conservativi sui mercati**



# Dove operano le imprese

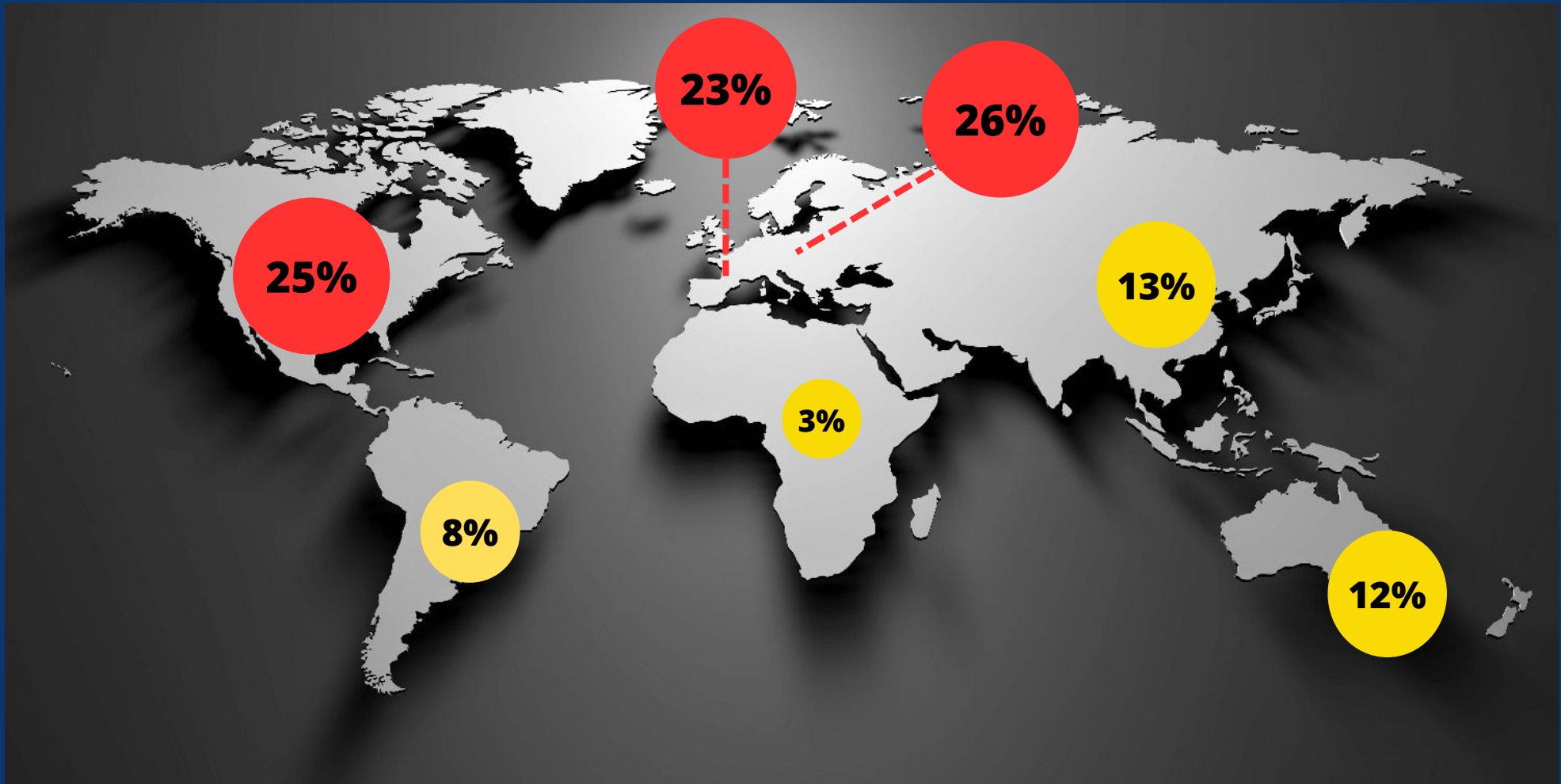


# Concentrazione ancora spinta

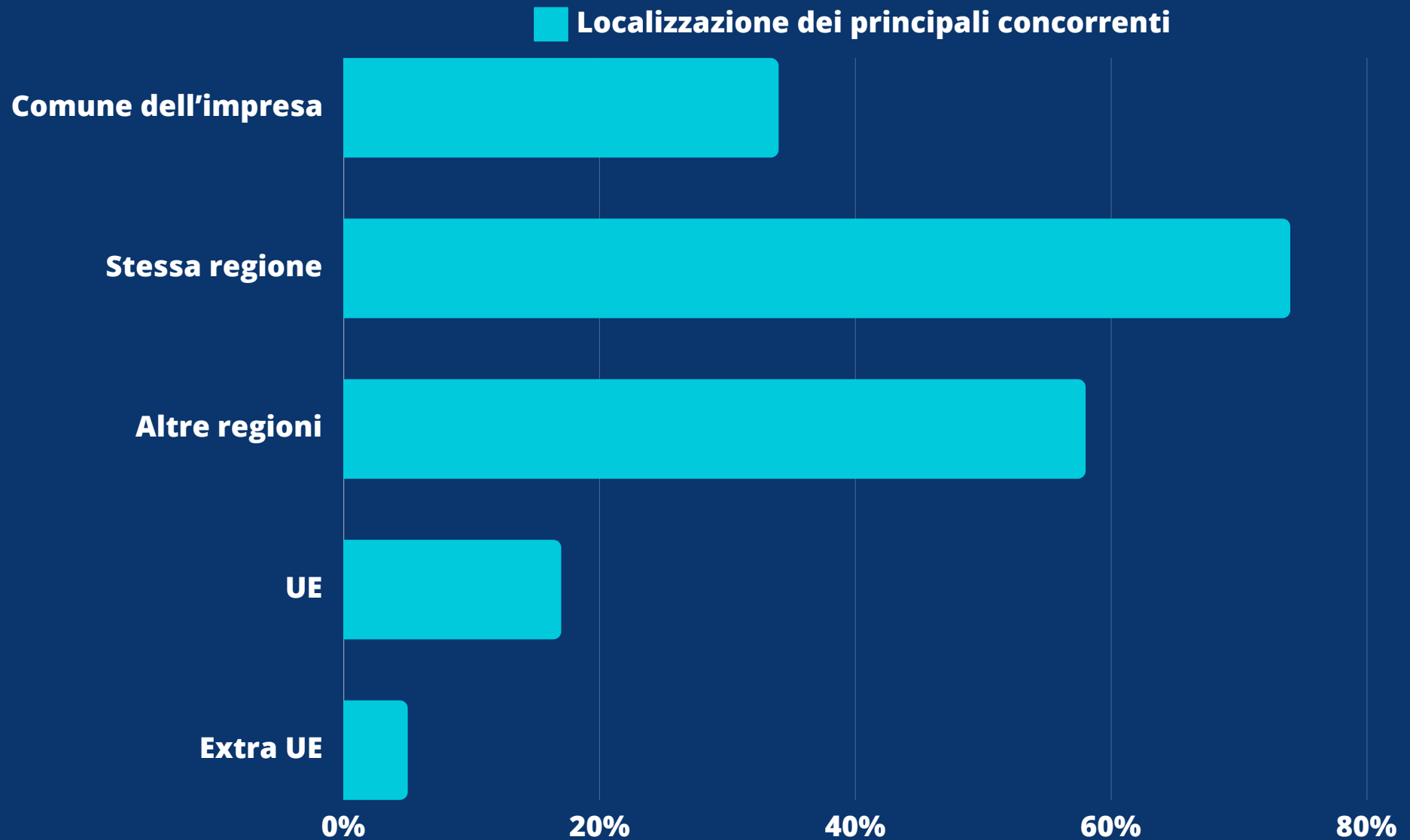


# Pesanti a Nord-Ovest, leggeri nel Sud-Est

Quota % Italia su totale import delle rispettive aree - 2022



# Il vicino è il mio incubo peggiore

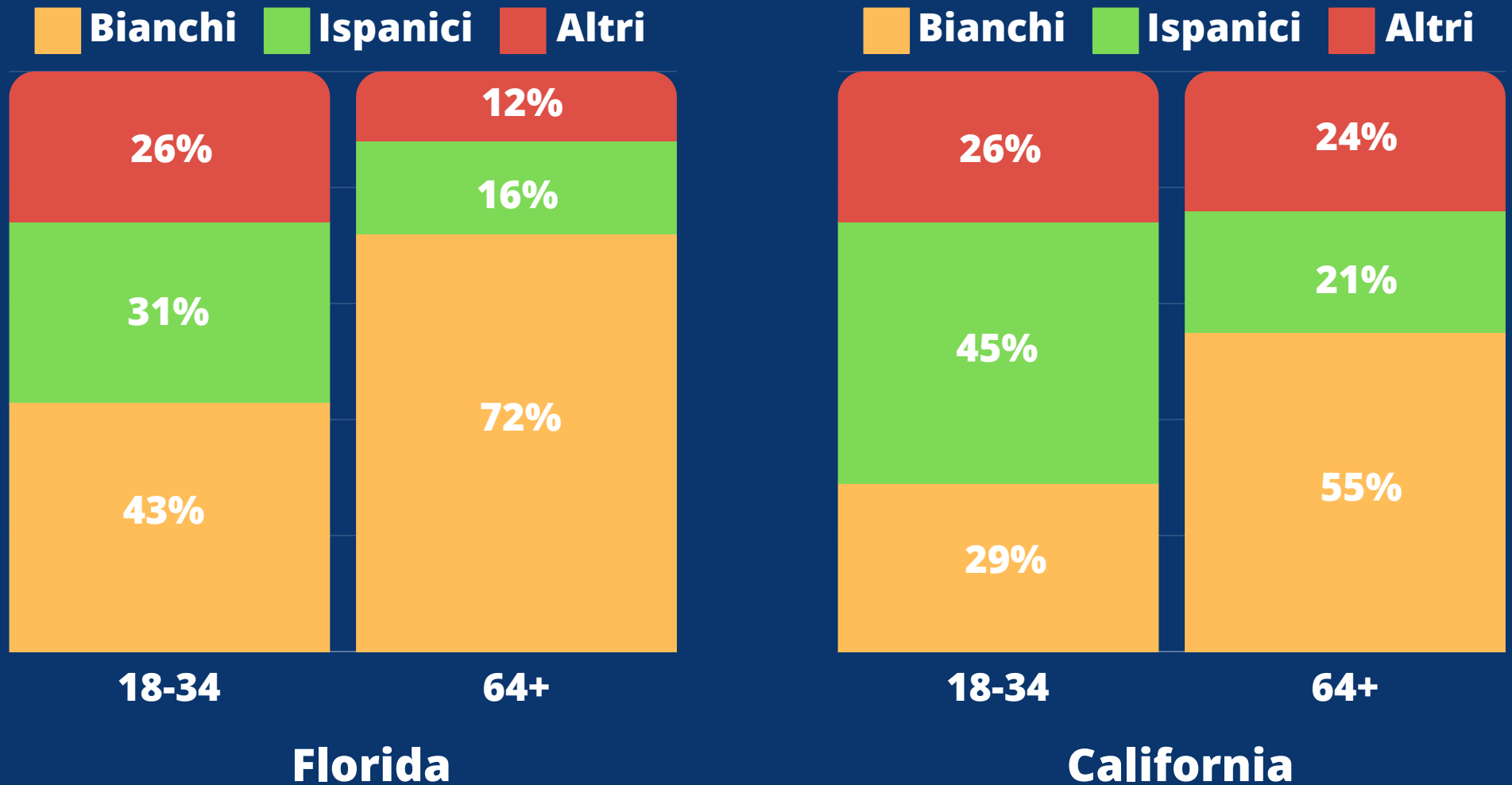


**Parte quinta**

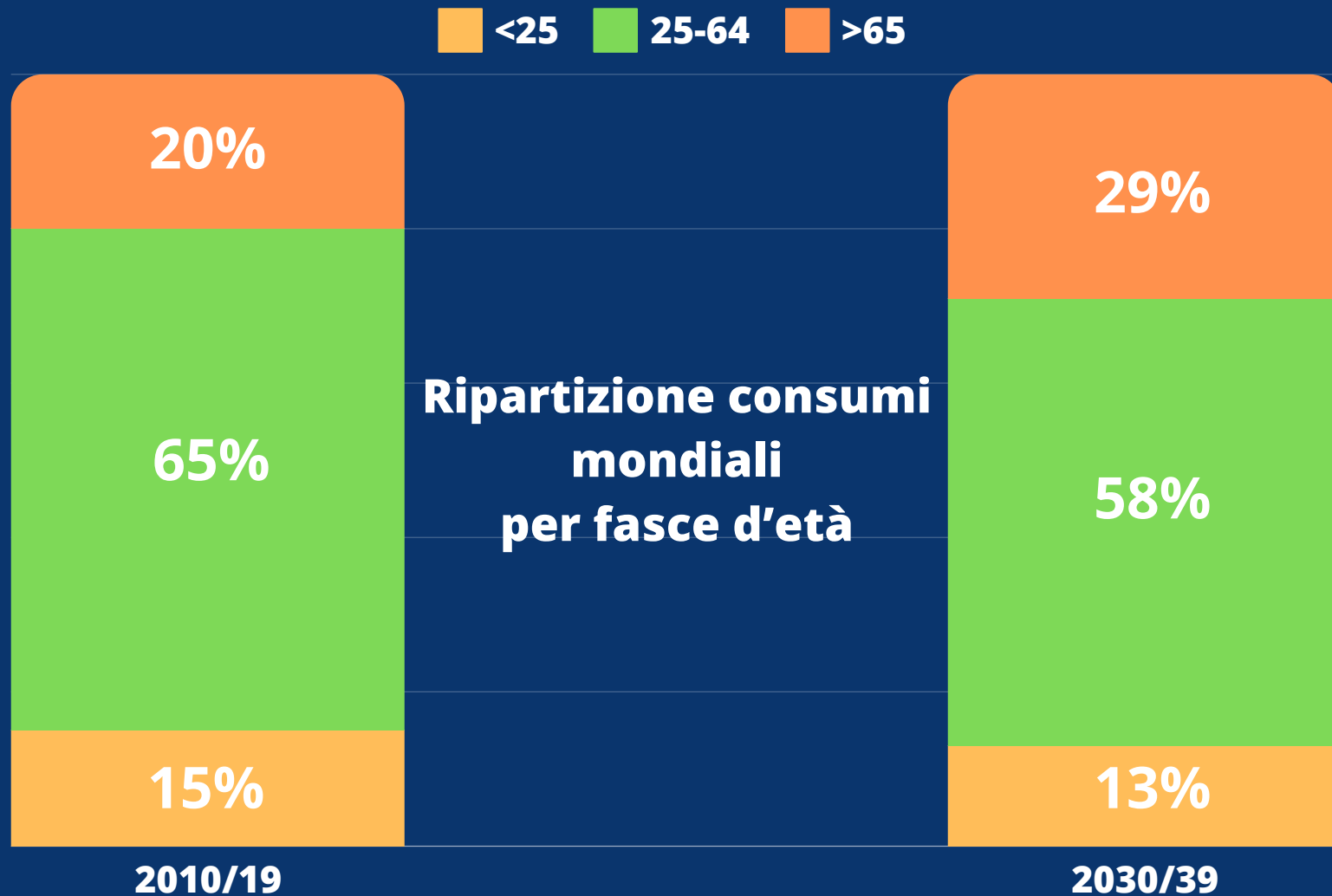
**Questi giovani...**

# I nuovi americani: e chi li conosce?

## Giovani e meno giovani per etnia

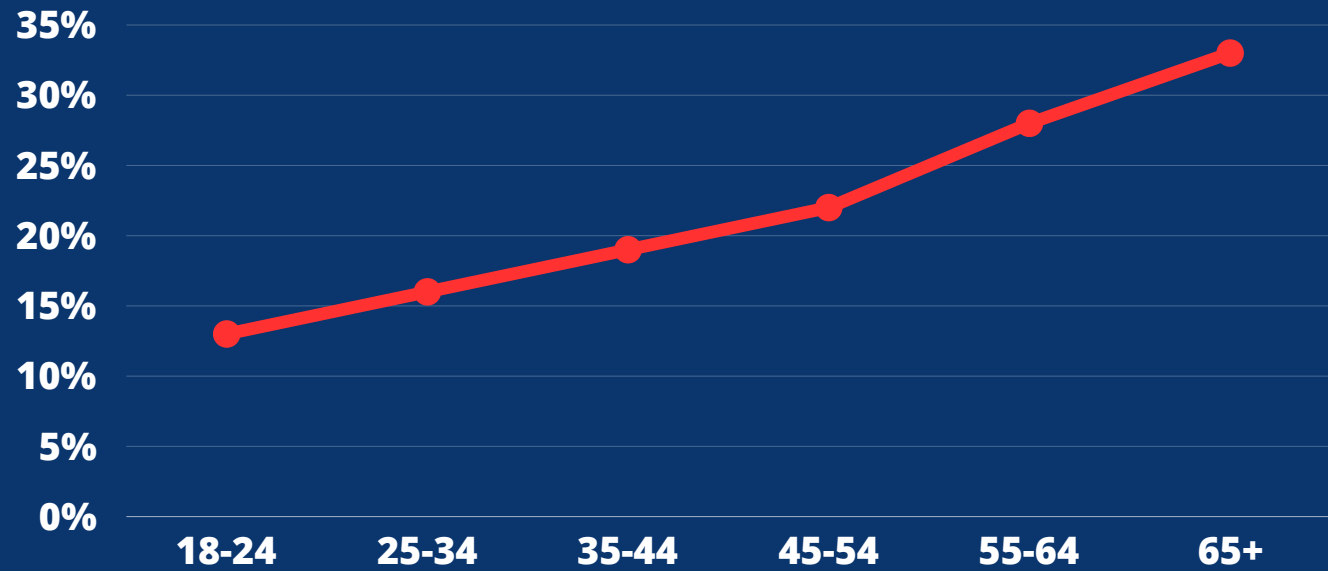


# Se non investiamo sui giovani...

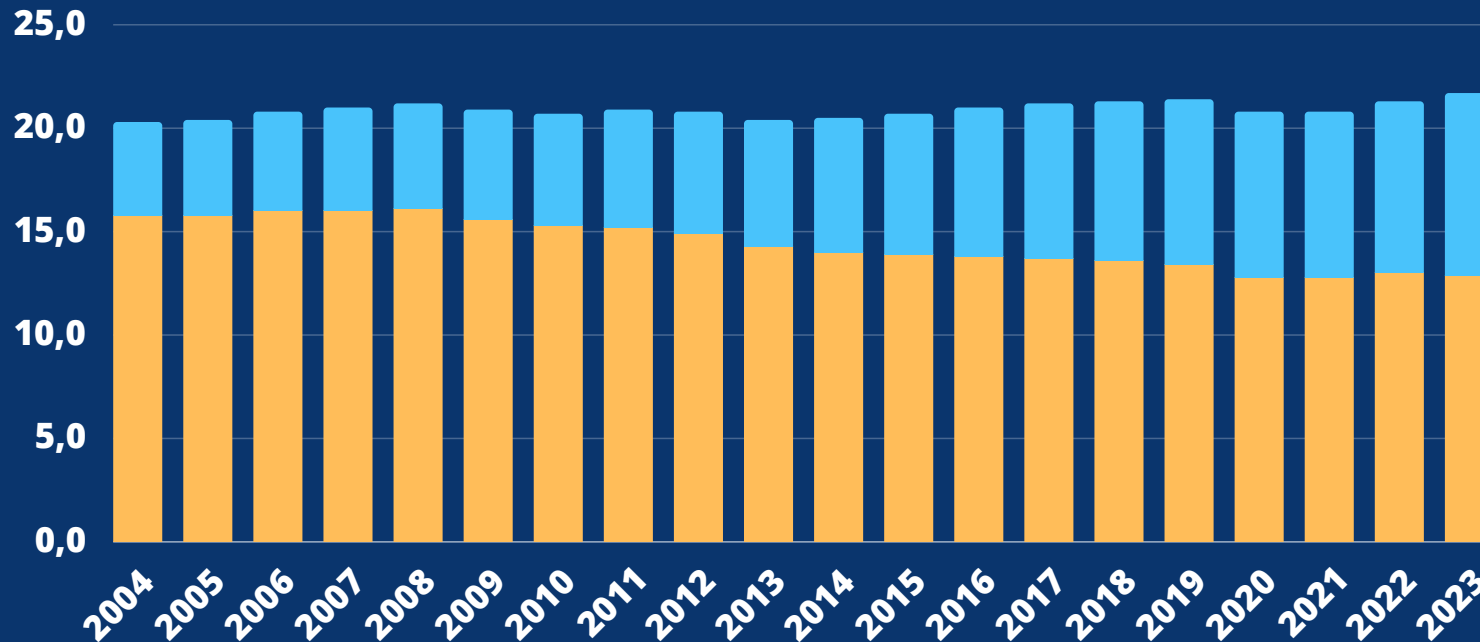


# E in Italia?

**% consumatori quotidiani su popolaz. stessa fascia età**



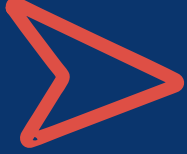
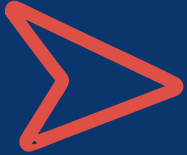
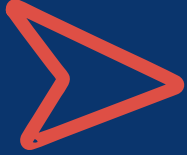
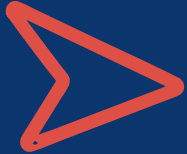
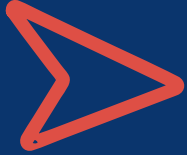
**25-49** **50-64**



**Occupati in Italia (milioni)**



# Fattori chiave

-  **L'Italia ha prodotto profondi cambiamenti, più di ogni altro Paese**
-  **I cambiamenti non hanno però ampliato i mercati di riferimento**
-  **Le aziende dimostrano visioni strette in termini di concorrenza**
-  **In mancanza di brand, le Dop sono state un rifugio necessario**
-  **Più che di nuove Dop, si ha la necessità di cambiare profondamente quelle esistenti per assecondare le nuove tendenze di consumo**