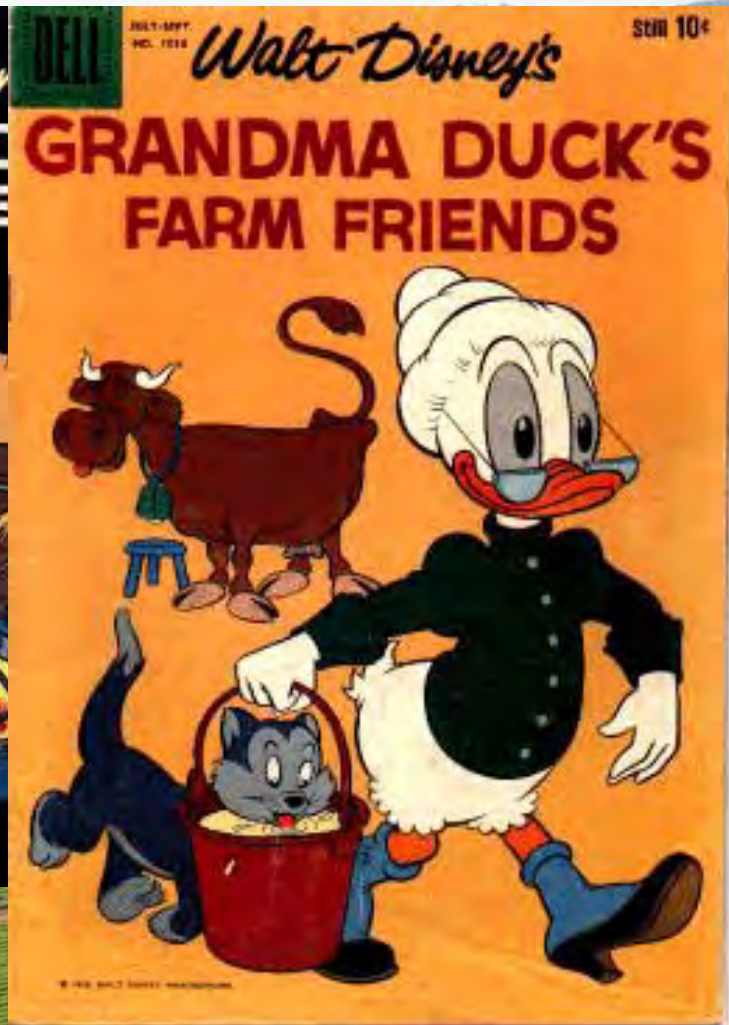


Il vino biologico: situazione e tendenze



Roberto Pinton



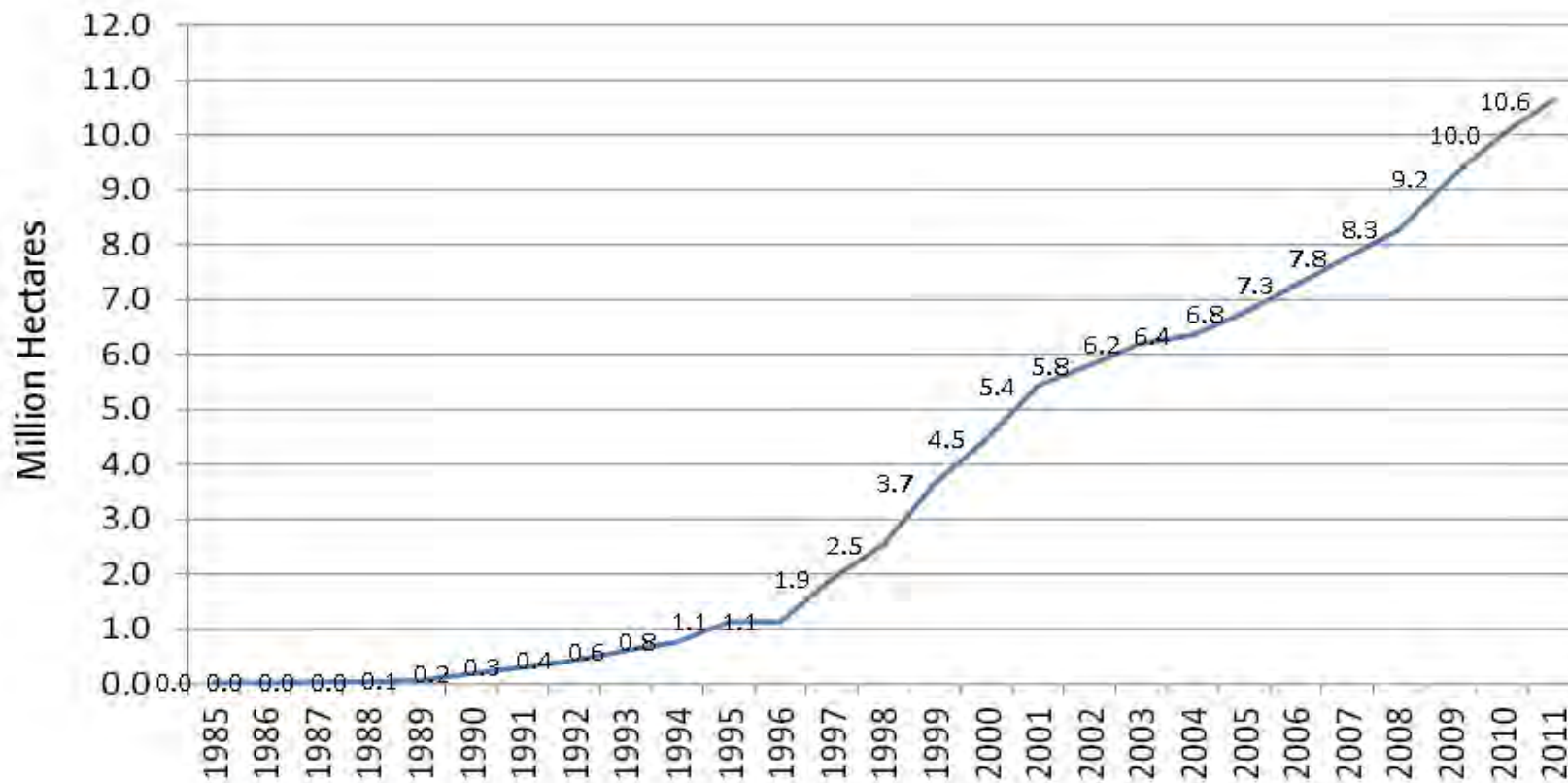
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SUPERFICIE BIOLÓGICA (HA) IN EUROPA

Europe: Development of organic agricultural land 1985-2011



A photograph of two farmers working in a field. One farmer, wearing a green jacket and grey trousers, is bent over using a long-handled tool. The other farmer, wearing a grey sweater and dark trousers, is standing and holding a similar tool. The background shows a rolling landscape with trees and hills.

**65% degli agricoltori italiani
ha meno di 50 anni**

(solo il 14% nell'agricoltura in genere)

In Italia

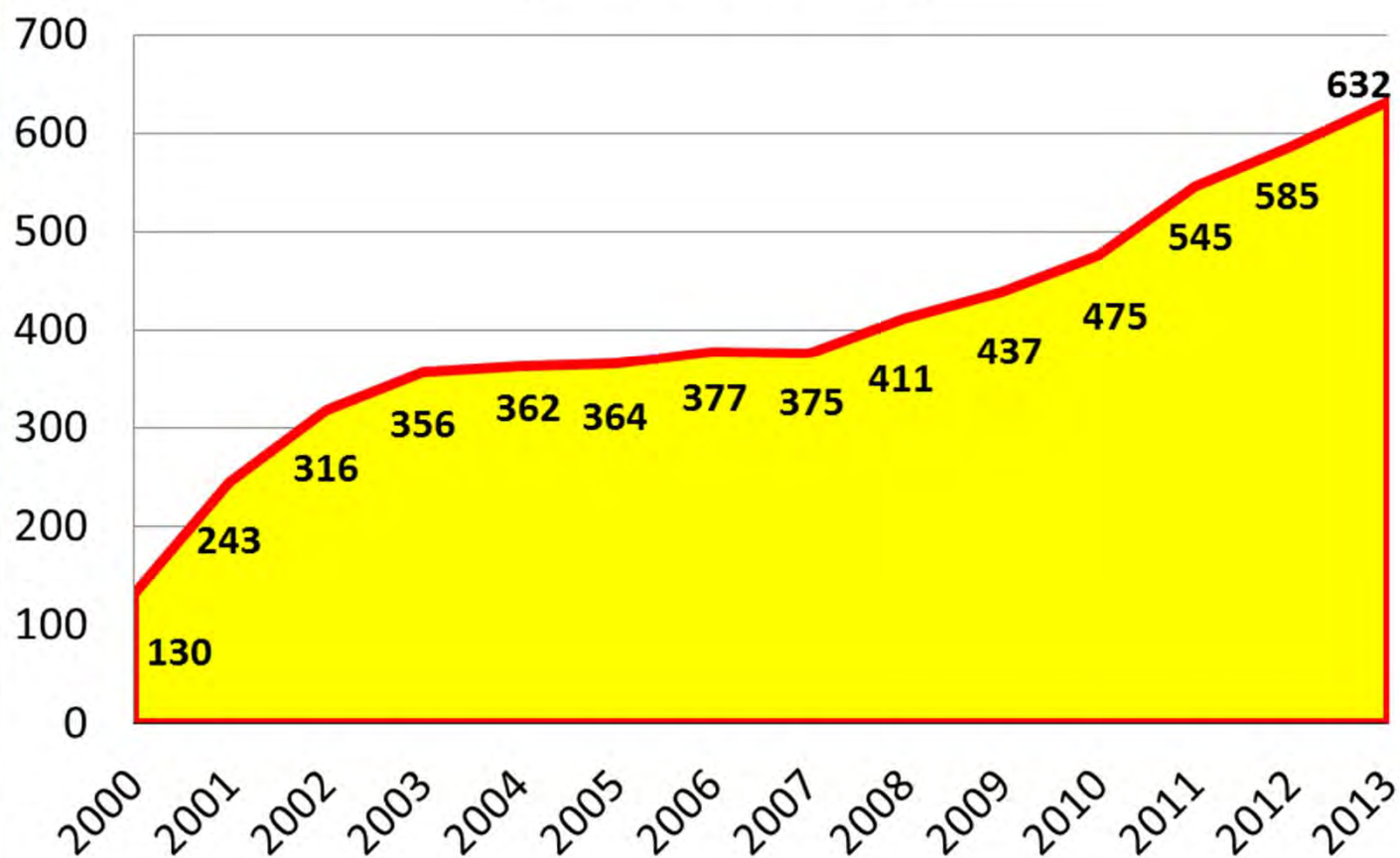
43.815 aziende agricole biologiche

FEDERBIO

An aerial photograph of a lush green hillside in Italy. The hillside is covered with terraced vineyards, with rows of grapevines visible. Several traditional Italian houses with white walls and terracotta roofs are scattered across the slope. One house has a balcony with a wooden railing. In the foreground, there are tall, slender cypress trees. The overall scene depicts a typical Italian agricultural landscape.

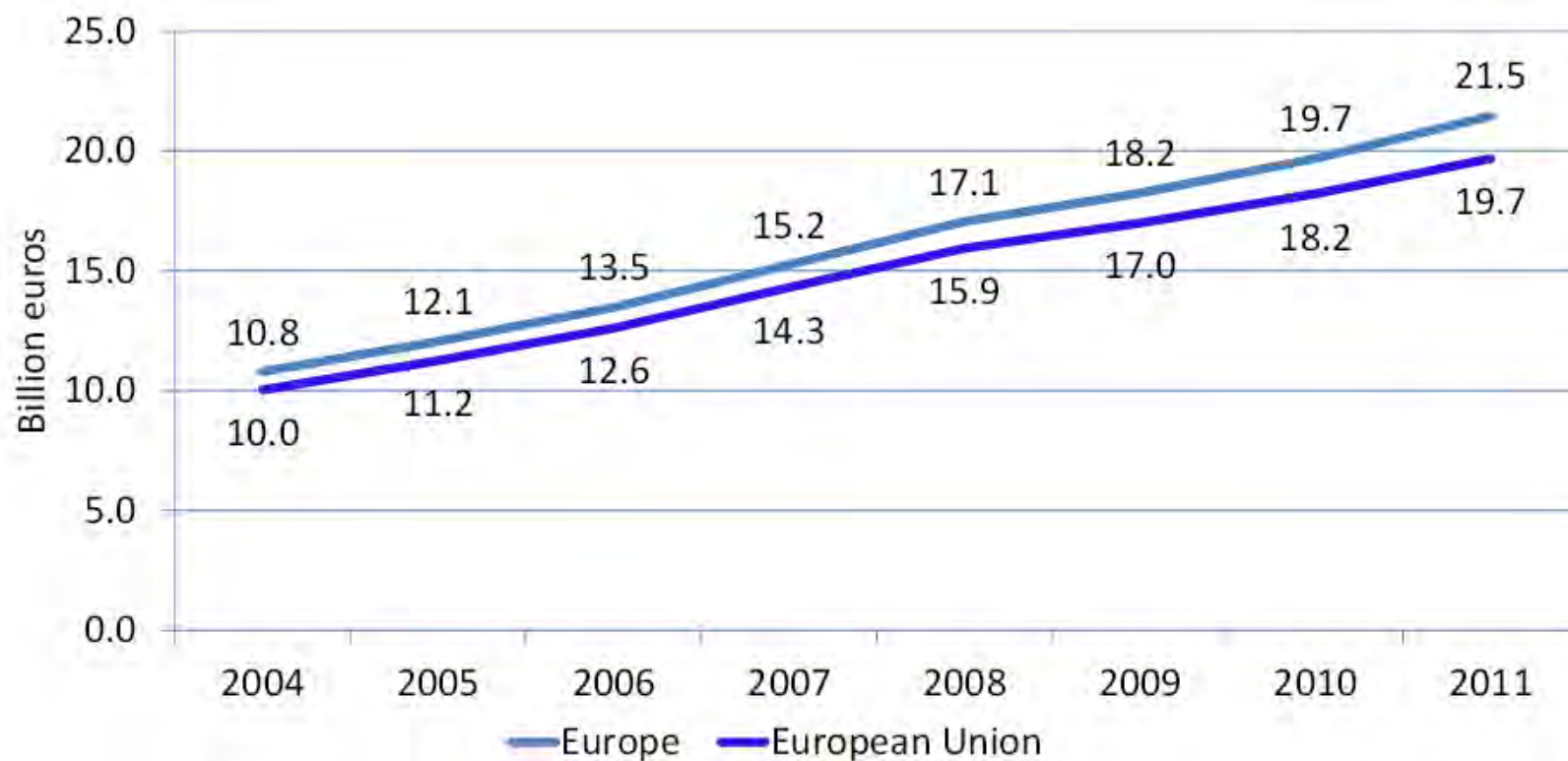
**8% della superficie agricola
italiana è biologica**

Vendite prodotti biologici in GDO 2000-2013 (in milioni di EUR)



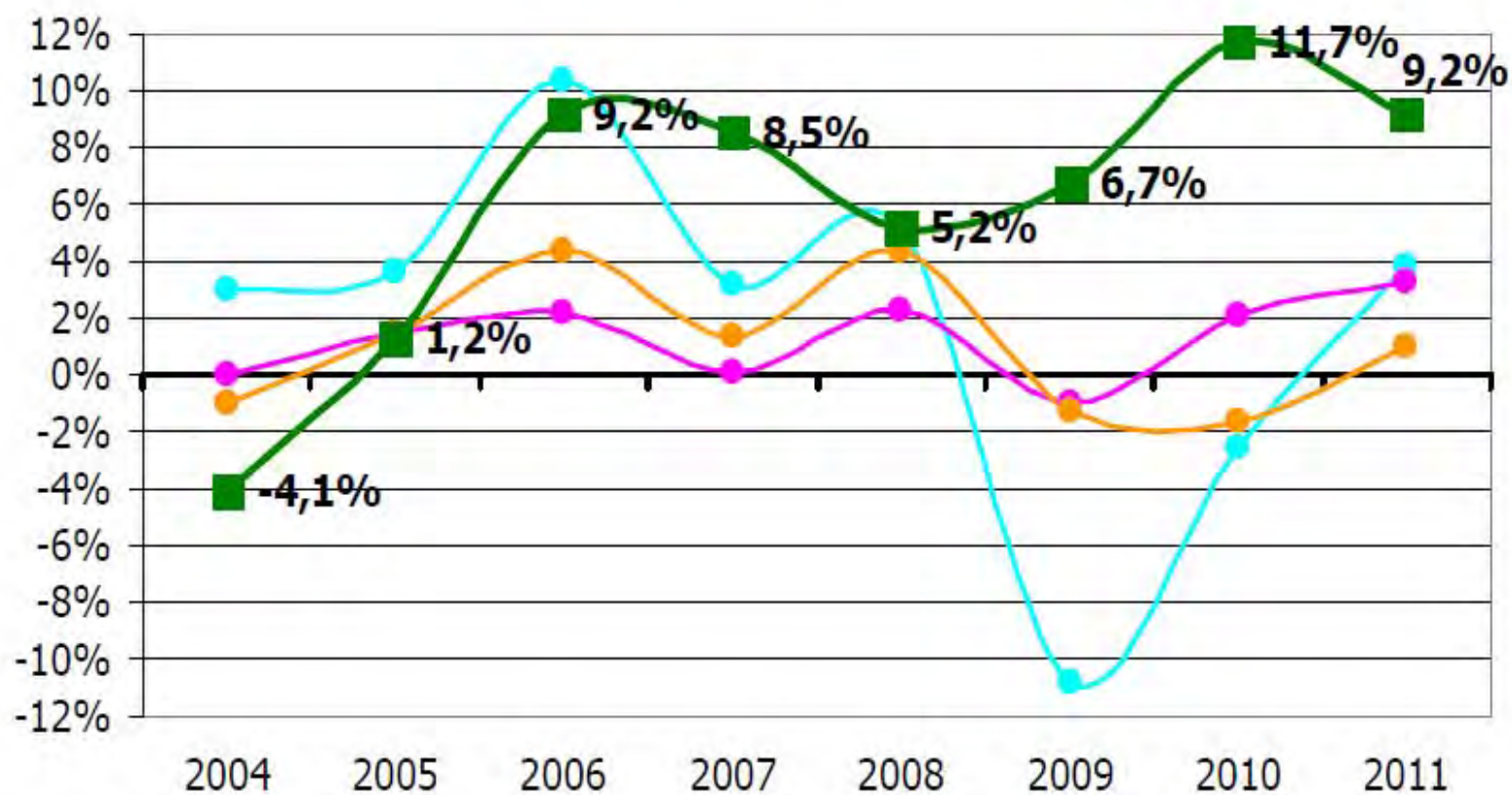
VENDITE BIO IN EUROPA 2004/2011

Europe: Growth of the Organic Market 2004-2011



ANDAMENTO VENDITE PRODOTTI ALIMENTARI 2004/2011 IN ITALIA

- PRODOTTI BIOLOGICI
- PRODOTTI DOP/IGP
- ALIMENTARI IN GENERE
- VINI DOC/IGT





I principali motivi d'acquisto:

- **sicurezza** alimentare (non residui, no additivi, no OGM);
- **sapori** più autentici;
- tutela dell'**ambiente** (no pesticidi, biodiversità);
- **benessere animale** (no gabbie, no antibiotici, alimenti biologici, libertà di pascolo, no OGM);
- **intolleranze**, allergie.

**Maggior esportatore di prodotti biologici al mondo:
ITALIA
1.35 miliardi di EUR**



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**Carrefour presenta
2.000 referenze
biologiche**

**Carrefour
BIO**



FEDERBIO



**Il 20 marzo 2013
Carrefour ha aperto
il suo primo negozio
tutto biologico nel
cuore di Parigi, in
boulevard Diderot,
nel 12°
arrondissement ,
170 mq.**

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**I prodotti biologici
rappresentano il
6,3 % del mercato
alimentare svizzero**



FEDERBIO



Migros nel 2012 si è alleato con Alnatura e ha lanciato un format tutto bio a Zurigo



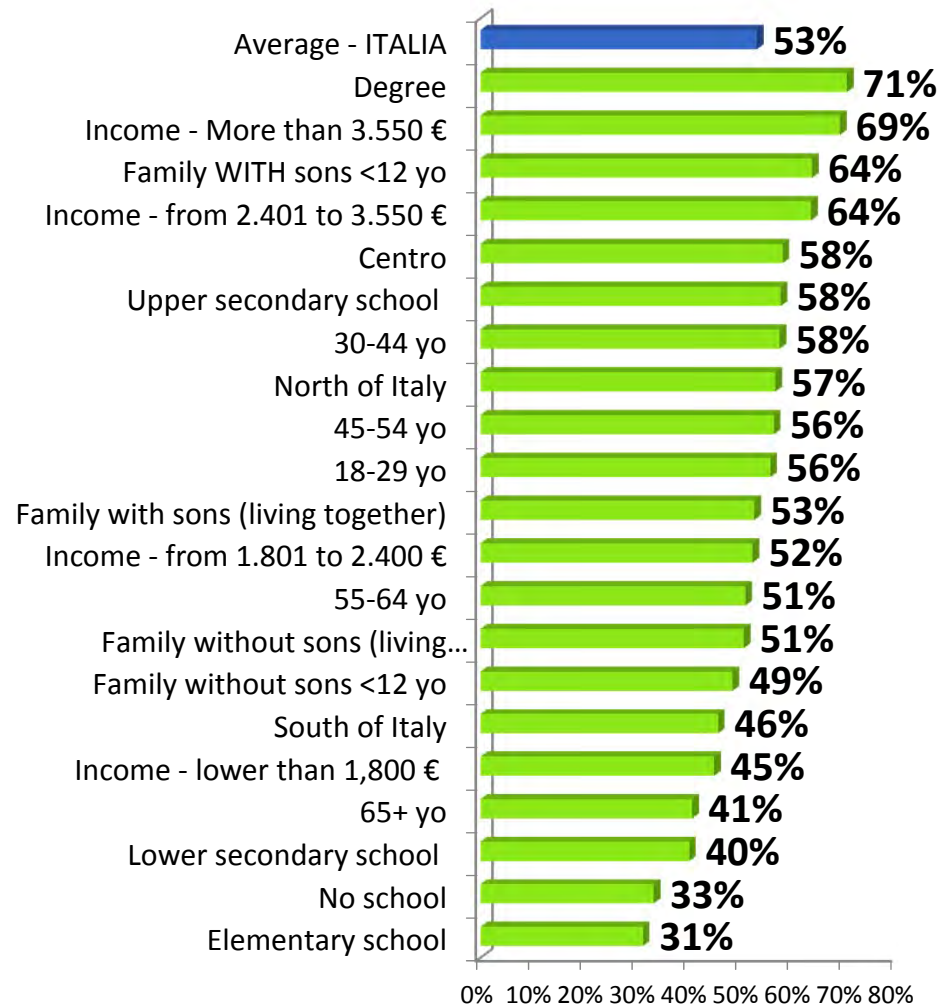
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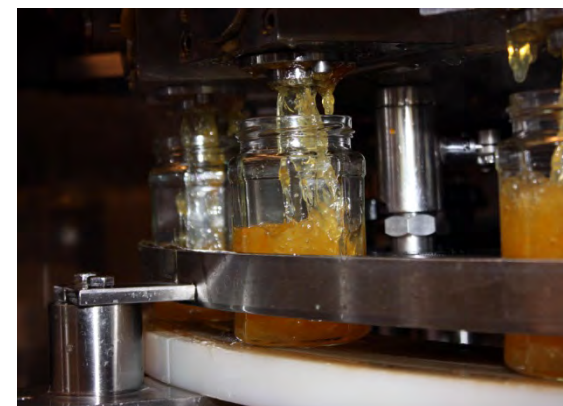
AssoBio



I prodotti biologici, valgono OLTRE IL 25% delle vendite di Irma.

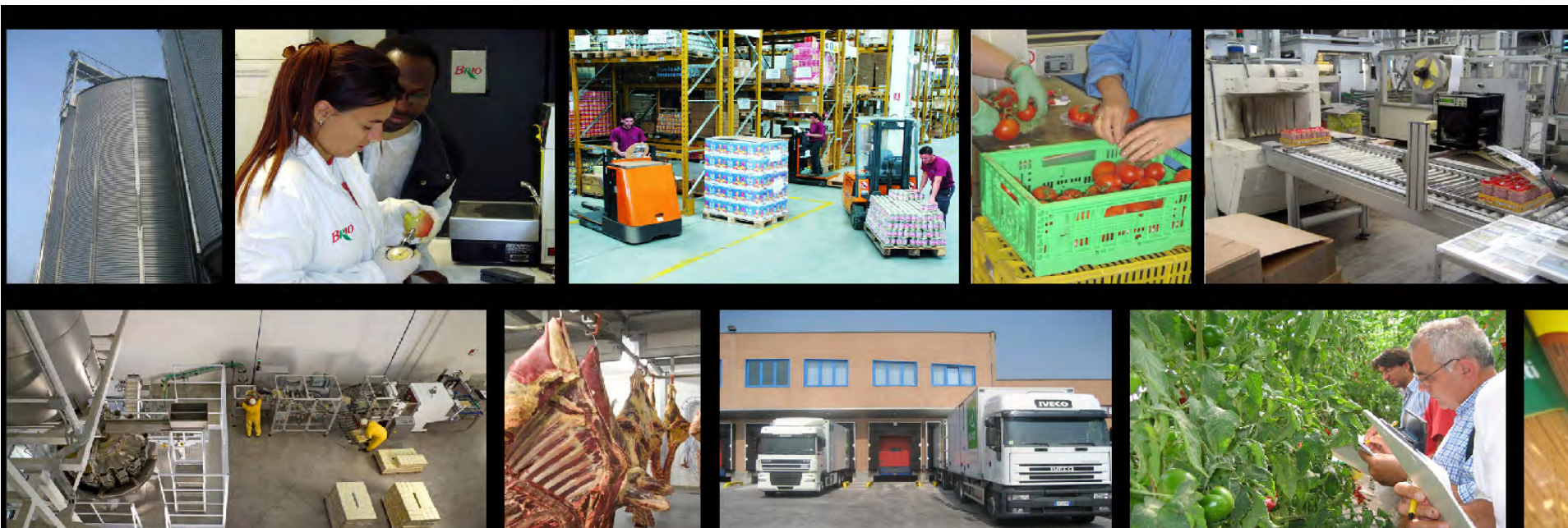
Penetrazione dei prodotti biologici per target





Dal 2006 il leader di mercato per confetture e marmellate è un'azienda biologica, con una quota oltre il 20%

FEDERBIO



Imprese piccole, medie e grandi leader nel mercato biologico mondiale





Vini da tutte le zone vitivinicole d'Italia

All'International Wine Challenge di Londra 2013, un Franciacorta DOCG biologico ha vinto l'Iwc Organic Trophy come **miglior vino biologico al mondo, ma anche l'Italian Sparkling Trophy, come **miglior spumante italiano in assoluto****

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**Il 6.9% mangia "spesso"
biologico fuori casa**

**Il 51.1% mangia "a volte"
biologico fuori casa**



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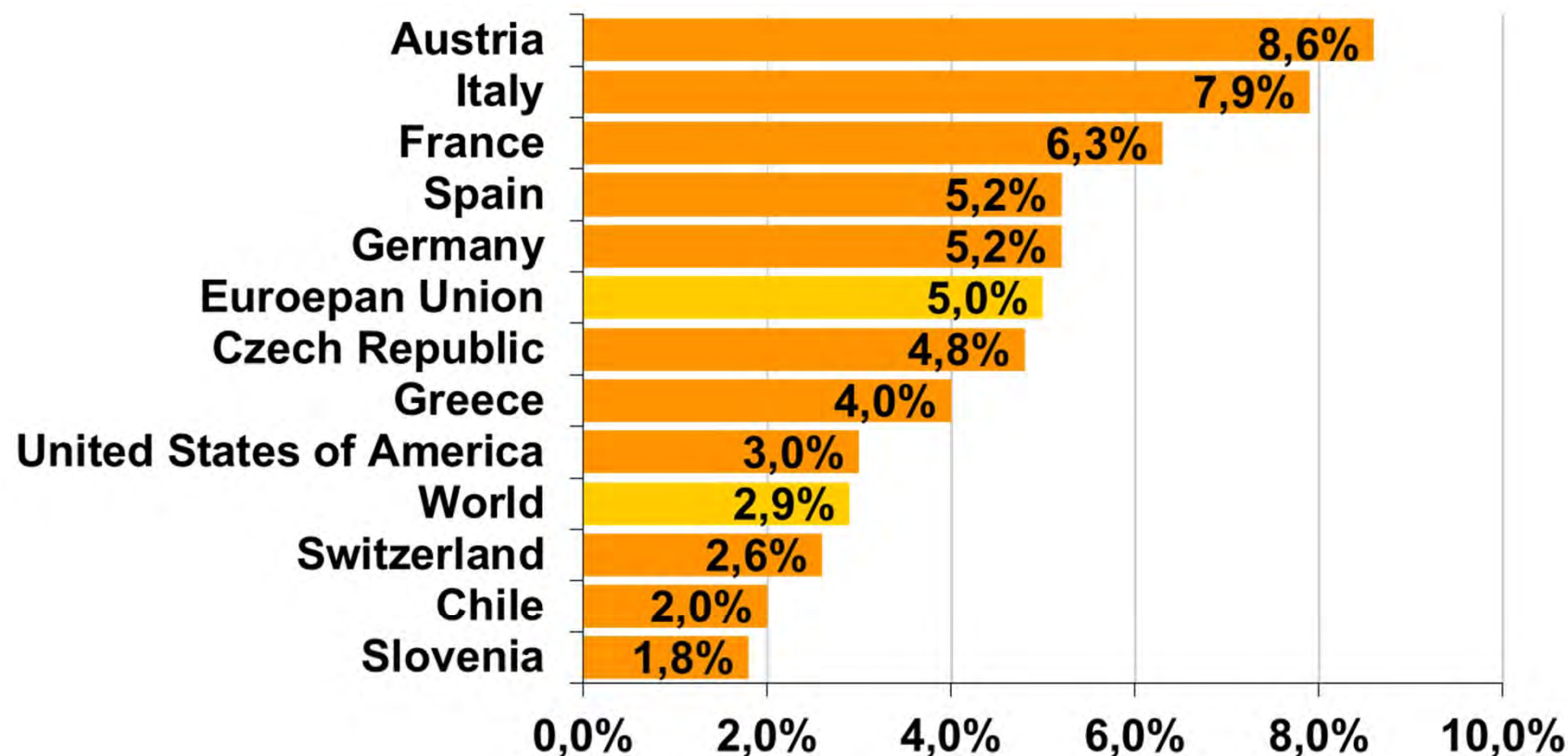


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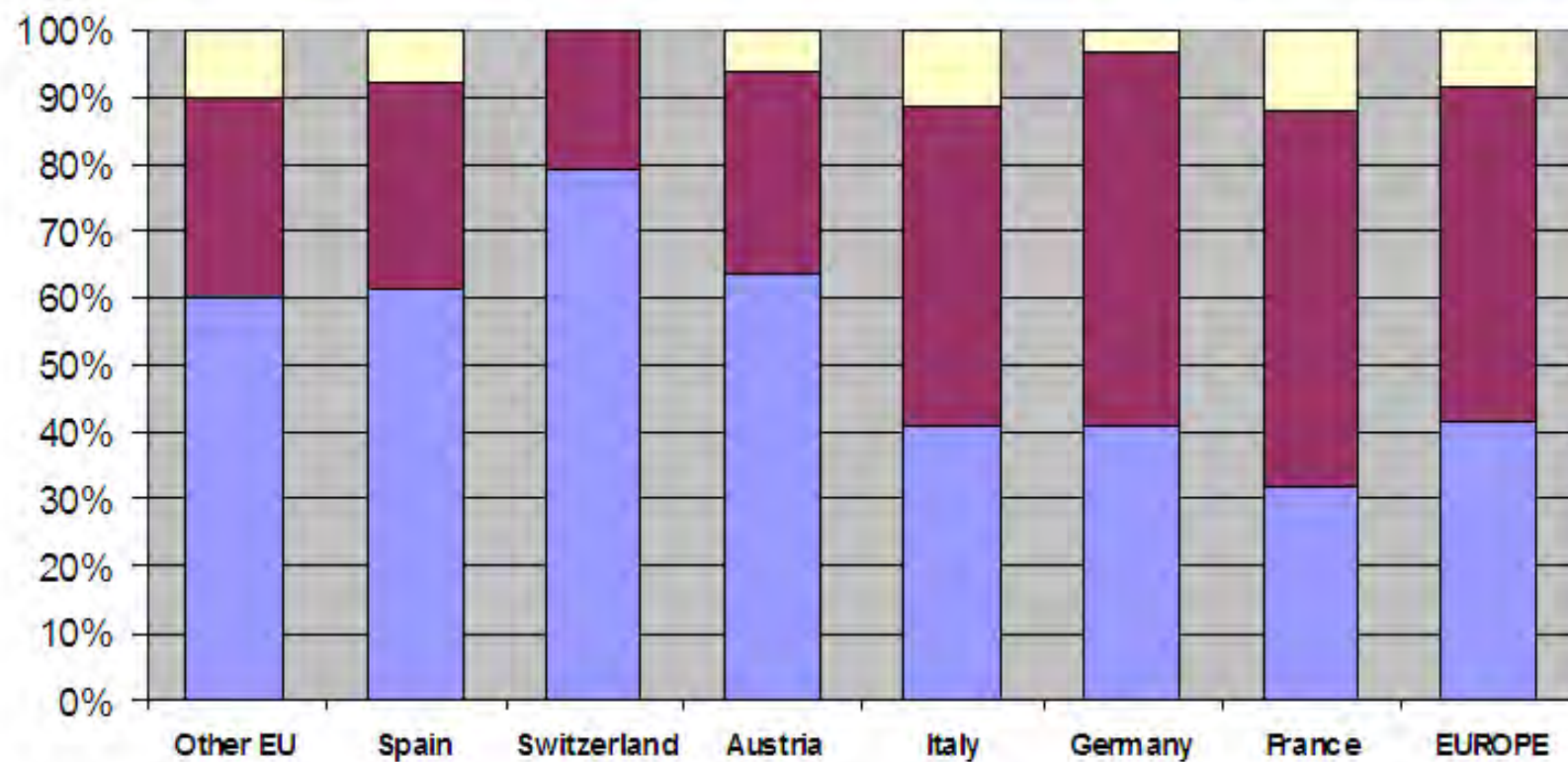
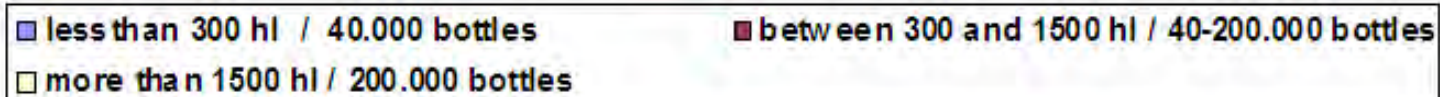


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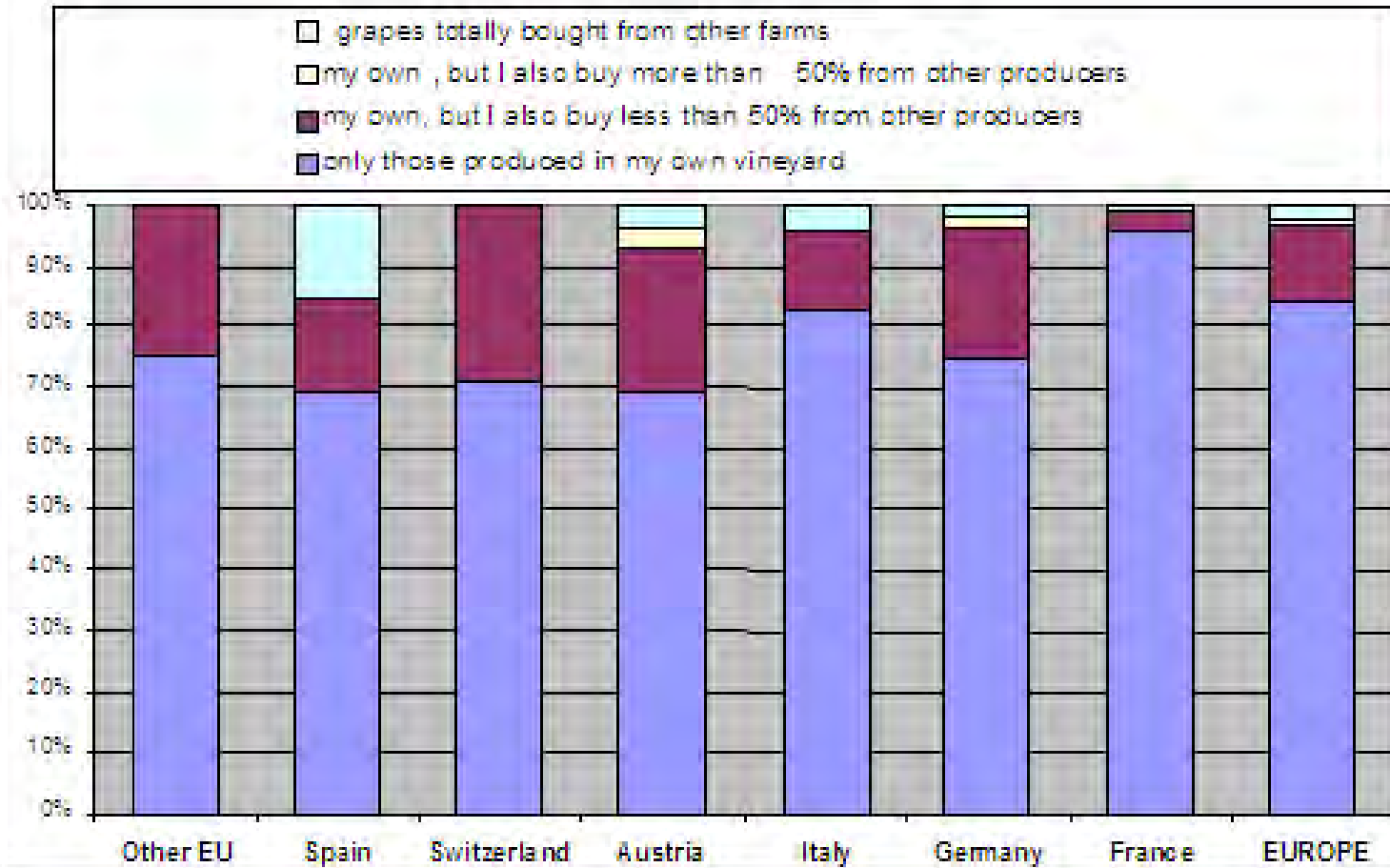
I primi 10 Paesi per incidenza della viticoltura biologica



How much organic wine do you produce?



Whose grapes do you process?



anno	Conversione	Biologico	Totale	incremento %
2009	15.751	26.984	42.735	
2010	21.214	29.349	50.563	18,32%
2011	18.172	33.171	51.343	1,54%
2012	19.709	36.261	55.969	9,01%

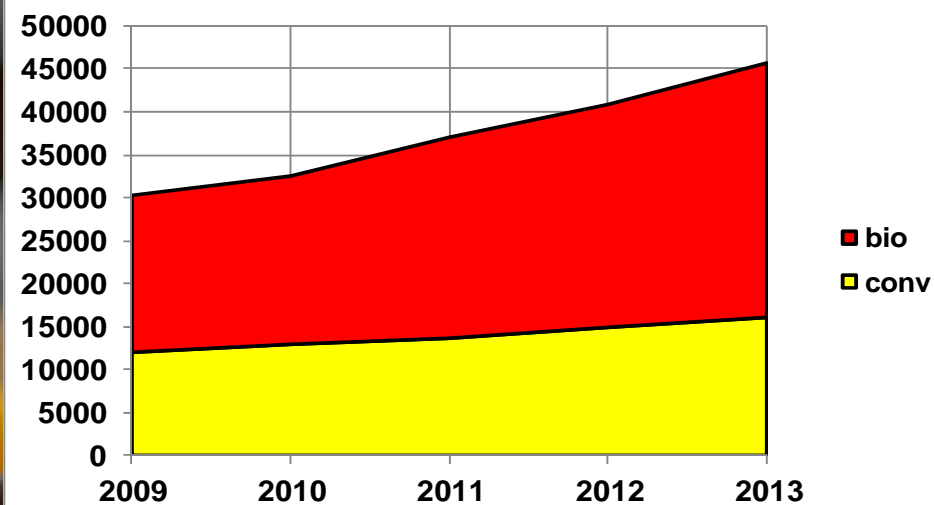
Ettari biologici totali da Ministero politiche agricole

CANTINE BIOLOGICHE 2009-2012

2012	Cantine - Vinificazione	1120
2011	Cantine - Vinificazione	699
2010	Cantine - Vinificazione	617
2009	Cantine - Vinificazione	753

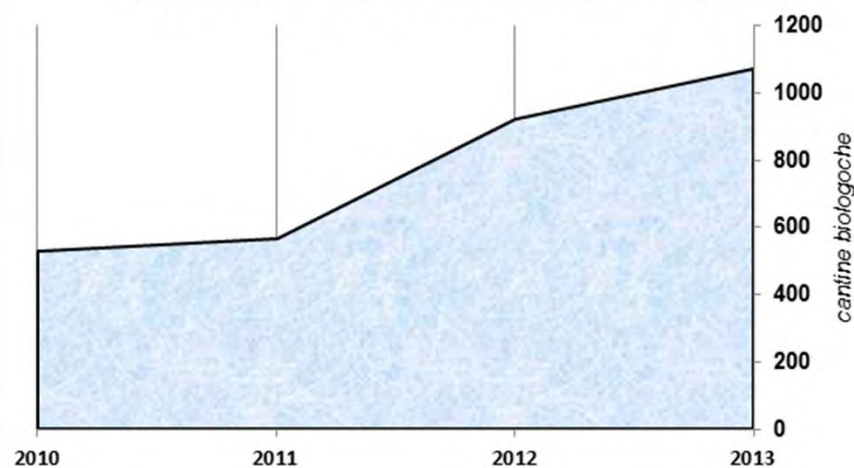
Cantine biologiche controllate da organismi di controllo soci Federbio

Superficie vitata biologica in Italia, 2009-2013
(base: sette organismi di controllo soci FederBio)



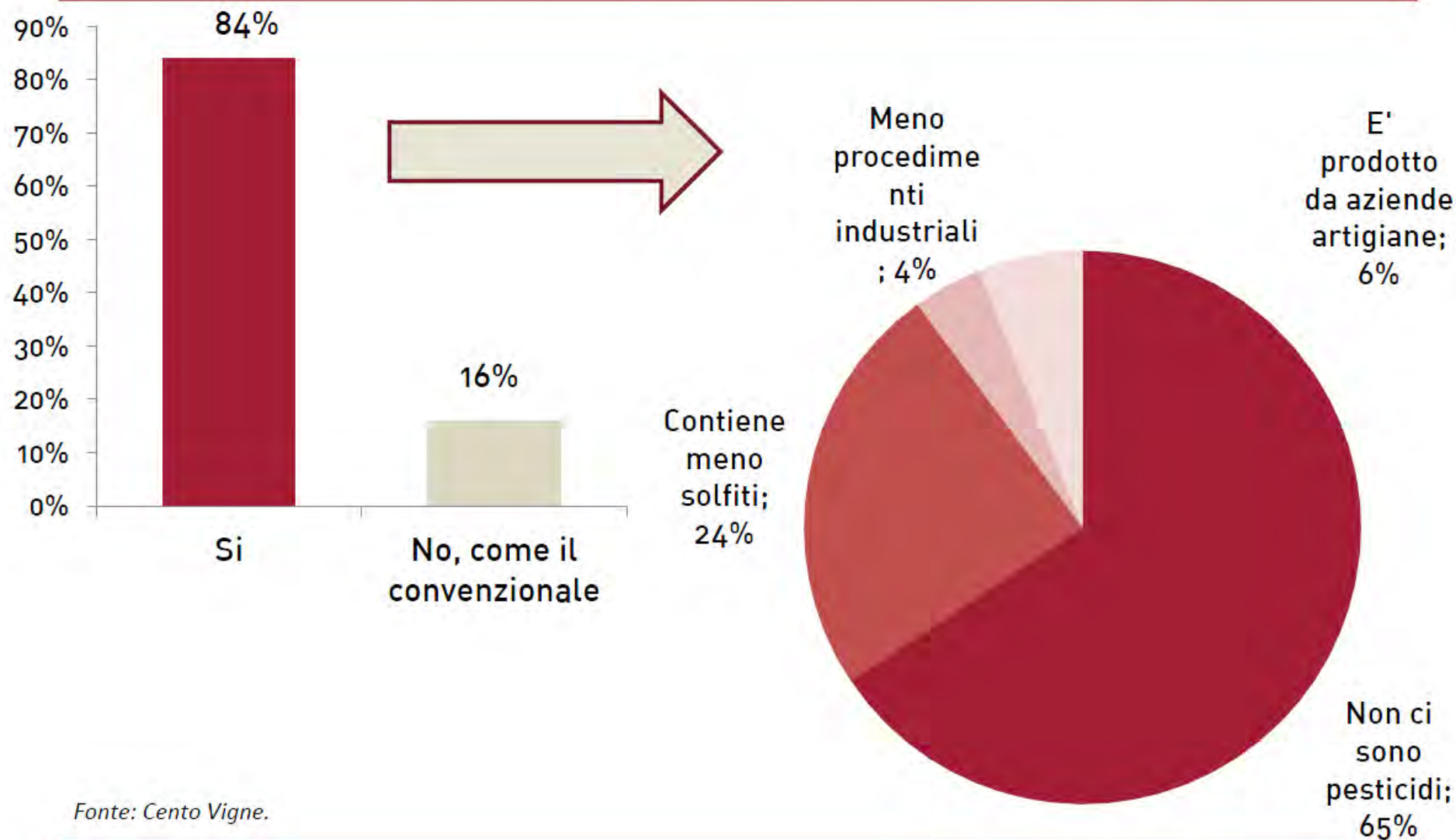
Numero cantine biologiche, Italia 2010-2013

(base: campione 7 organismi di controllo soci FederBio)



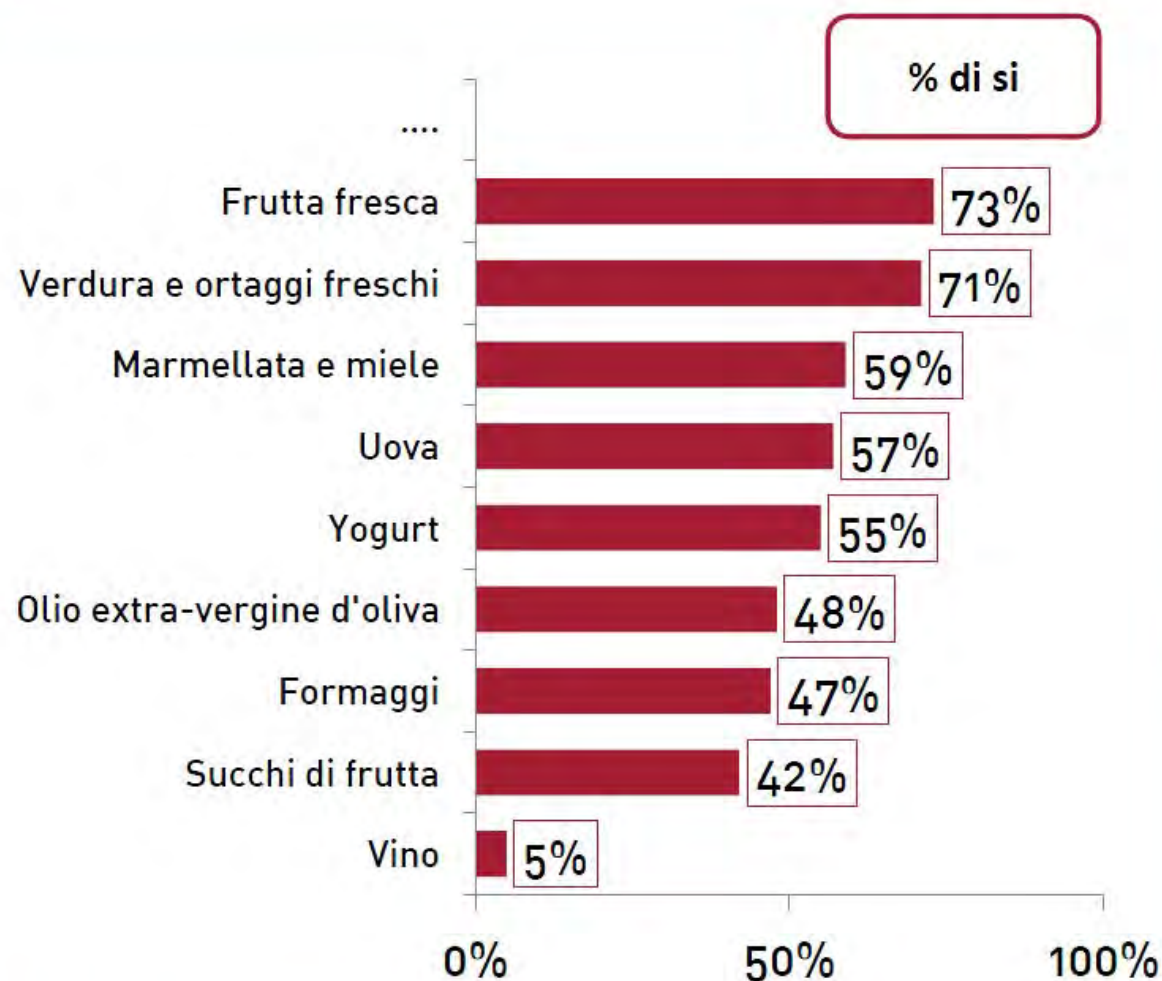
Sicilia 15.176 ettari
Puglia 8.665 ettari
Toscana 8.589 ettari

Percezione del vino Bio – E' più salutare?



Fonte: Cento Vigne.

Almeno una volta negli ultimi 12 mesi ha comprato i seguenti prodotti con marchio bio?



Almeno in una occasione
negli ultimi 12 mesi, il 5%
dei consumatori di
prodotti BIO ha messo nel
carrello una bottiglia di
vino biologico



Il 2% delle famiglie
italiane ha acquistato in
almeno un'occasione
VINO BIO

*Fonte: elaborazioni Nomisma per
Osservatorio SANA 2012*

Nel 2012 il 53% delle famiglie italiane acquistava prodotti biologici, il 5% acquistava vino.

492.235 FAMIGLIE HANNO ACQUISTATO VINO BIO

**Nel 2013 l'11,6% delle famiglie italiane
ha acquistato vino VINO BIO**

(Nomisma Wimenonitor)

**In GDO il vino bio segna +4% a volume rispetto al 2012
(a fronte di un -6,5% per il totale della categoria vino)**

Eco-Premium or Eco-Penalty?

DO AUSTRALIAN WINE CONSUMERS V

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Eco-labels and quality in t

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AMERICAN ASSOCIATION OF WINE ECONOMISTS

AAWE WORKING PAPER No. 14

CEAGO VINEGARDEN: HOW GREEN IS YOUR WINE? ENVIRONMENTAL DIFFERENTIATION STRATEGY THROUGH ECO-LABELS

Magali A. Delmas
Vered Doctori-Blass
Kara Shuster

March 2008

www.wine-economics.org



“Green” Wine Market Trends: *From Green Roots to Great Wines*

Ann Thrupp, PhD

Fetzer & Bonterra Vineyards

Ecovinegrowing Symposium

July 2011

THE ORGANIC GROWTH OF BIODYNAMIC WINES

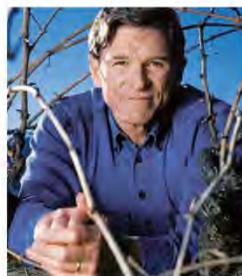
The American wine market, a world of critter brands, organic certification and appellation wines, is already confusing enough to the average consumer. But the emerging biodynamic category may manage to achieve the sales that organic wines haven't, suggests Larry Walker.

Organic wine sales in the United States have never hit the pace that many expected. While organic food sales in general are growing at a 20% plus annual rate, organic wine sales have lagged. So it is a little surprising to find some optimism by producers of biodynamic wines, a category that would seem even more difficult to establish. However, participants and speakers at a Biodynamic Wine Forum held in San Francisco last November were cautiously upbeat. Mike Benziger, of Benziger Family Vineyards, said 2007 was the 'tipping point' for biodynamic wines.

"Biodynamic wines are perceived by the trade as very high quality wines on a global level. Retailers and restaurants are getting behind the wines in a big way. However, they are a hard sell," he said. "We have found that retailers who are out on the floor selling the wines are a big help." That, though, can be said about all wines. More to the point, he continued that "those restaurants that feature fresh local produce and really care about the food can be a huge help. They get what we are trying to do."

Benziger added, "To be honest, consumers are still somewhat confused by the nomenclature, what is biodynamic, what is organic, but they are very sensitive now to environmental issues and biodynamic wines are seen as a holistic and friendly approach to the earth."

There is also some confusion over the definition of an organic wine. In Europe, producers are allowed to add sulfites to wine to enhance stability. In



>> Biodynamic wines are not a rich man's game, but a committed farmer's game. <<

Paul Dolan, winemaker

the United States, a wine with sulfite added cannot be labeled as fully organic. Instead, the label may only bear the mention that the wine is made from organically grown grapes. Wines made without the addition of sulfites have often been of uneven quality, especially in the 1980s and early 1990s, when many domestic winemakers were still learning to deal with the issue.

Benziger agreed that the image of organic wines has been hurt by the quality of some wines. "With biodynamic, however, we've got a chance to do it right and let the wine speak for itself," he said. "If you lose credibility in dealing with environmental issues, like organic wines or biodynamic wines, it's very difficult to recover it."

Benziger first introduced a biodynamic (BD) wine in 2002. At the time, it was a small part of the winery's production. "We soon realized that the trade and the public demanded that we go all the way. We started working with growers and put a program in place in 2003. For the first time in 2007, all of our grapes were certified biodynamic or organic or sustainable."

But how does a BD wine differ from an organic wine? The easy answer is that BD wines are a step beyond organic. Both kinds of producers reject the use of chemical fertilizers, pesticides, herbicides, fungicides or fumigants. No hormones, antibiotics, growth regulators or genetically modified organisms can be used, the same as with organic growers.

All clear so far, but when you get into biodynamics, it becomes difficult if not impossible to offer a brief definition. Privately, some producers agree that consumer confusion is only natural when biodynamic viticulture involves farming practices that seem downright weird (see box for more information). An international organization called Demeter is the major certifying agency for biodynamic agriculture.

Although there is plenty of paperwork, certification is not just a matter of filling in a few forms. It involves a three year program following guidelines related to cover crops, crop rotation and the protection and creation of wild spaces on the farm, as well as the use of certain biodynamic preparations.

The concept of biodynamic agriculture dates back to 1924 and comes from the work of Austrian philosopher



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BFJ
104,3/4/5

The production and marketing of organic wine in Sicily

Consumer Purchase Intentions of Organic Wines

B. Ficani and G. Guccione
University of Palermo, Palermo, Italy

1. Marketing, Production planning and control,

itality

itality

ABSTRACT

This study is to investigate the role of consumers' perceptions of wine expertise, and eco-friendly attitudes on their purchase intentions of red survey with statements relating to perceptions of wine attributes, eco-friendly attitudes, purchase intentions, and socio-demographics consumers. Multiple regression analysis is used to investigate the consumers' perceptions of organic wine attributes, perceived wine expertise, and purchase intentions.

Attributes, wine expertise, eco-friendly attitudes, purchase intentions.

INTRODUCTION

A significant beverage around the world. In 2003, over 233 million cases United States and sales totaled \$21,800 million (Adam Wine Handbook, according to the Organic Trade Association, U.S. sales of wines made with \$80 million in 2005, a 28 percent increase over the previous year. Such more than one percent of the total U.S. domestic wine market, but the organic wine sales to grow about 17 percent a year through 2008 (Singh,

people have become increasingly environmentally conscious. According to environmental surveys, environmentally conscious consumers are now purchasing products that affect the natural environment and have willingness to purchase eco-friendly products. Further, increasing number of health-conscious consumers is reaching not just for organic food, but for organic wine as well.

Knowledge of the organic wine sector in Sicily. In the 192/91 have had a wide diffusion in the agricultural areas and farms justify the attention paid by the wine sector have been examined: the influence on the demand to diffusion of the organic wine sector in Sicily: have been analysed to verify the scenario of organic wine production. The results show a wine. This is a sector in the process of major trade profile, mainly because of increasing demand

on of "organic wine production", in relation to the Region of Sicily. It should be noted that the Region of Sicily, 100 hectares, is one of the most important wine regions (second only to Sardinia) and, of particular importance, 100 hectares of organically grown vineyards. represents 37 per cent of the Italian scenario. The study was carried out using both statistics and interviews with the wine producers themselves. The methods, distribution outlets, home markets

as to wine producers in the West of Sicily. In the region, organic farming is catching on in the production of wine products. Even organic wine growing is an area covered by organic cultivation and the area also for the implementation of Reg. 2078/92. Companies dedicated to producing organic wine are adding it to their product range, is

72nd EAAE European Seminar: Organic Food 7-10 June 2001.

Empirical study conducted by the authors, however, M. Ficani, 1, 2 and 3, G.B. Ficani is responsible for paragraph 5. The introduction and the conclusion were jointly





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SCOMMESSE

- STRUMENTI PER L'INTERNAZIONALIZZAZIONE DELLE IMPRESE OCM VINO?
- NETWORKING
- INIZIATIVE DI COMUNICAZIONE
non solo liberi da solfiti, ma anche liberi dal vino libero, dai vini «naturali», dai vini fru fru ecc.
- EXPO?



**Grazie
del'attenzione**

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