

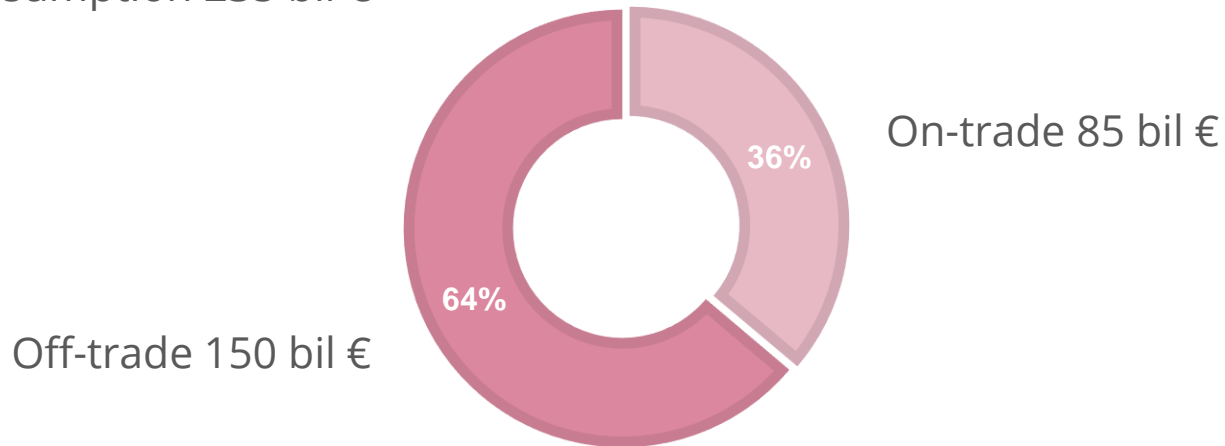


WINE IN THE HORECA CHANNEL IN ITALY

Before and after pandemic

Wine consumption 2019

Total consumption 235 bil €



Off-trade 150 bil €

On-trade 85 bil €

Source: Survey on Beverage Distributors on Italian wine market by Progettica.it



Wine become an important category

Beverage Distributor: category share (value, 2019)

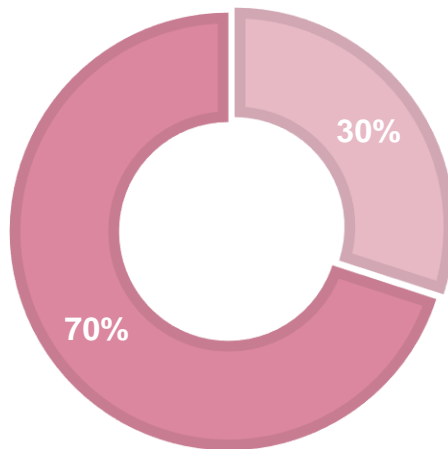
Beer (keg)	24,4%
Wine	15,4%
Spirit	15,1%
Beer (bottled)	14,7%
Soft drinks	13,5%
Water	11,9%
Aperitif	2,6%
Juice	2,5%

Source: Survey on Beverage Distributors on Italian wine market by Progettica.it





Bottled wine



Keg wine

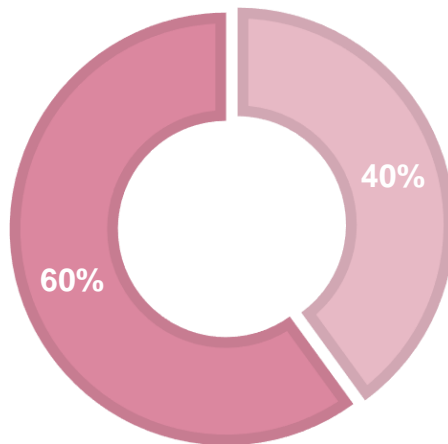


Source: Survey on Beverage Distributors on Italian wine market by Progettica.it





Still wine



Sparkling wine



Source: Survey on Beverage Distributors on Italian wine market by Progettica.it



Keg wine – a consolidated segment



- ❖ Ogni grossista tratta 2/3 cantine
 - ❖ Ranking prime 5 aziende
 - ✓ Serena
 - ✓ Montelvini
 - ✓ Cantine Riunite
 - ✓ Caviro
 - ✓ Maccari
 - ❖ Prezzo acquisto 1-1,10€/lt.
- M.S. 20%

Source: Survey on Beverage Distributors on Italian wine market by Progettica.it



Average purchasing price

	share	ave. price	50% volume	30% volume
Still wine	60%	3.85 €	2-3 €	3-4 €
Sparkling	40%	3.19 €	1.8-2.5 €	2.6-3.8 €
Total	100%	3.43 €	2-2.5 €	3-4 €

Source: Survey on Beverage Distributors on Italian wine market by Progettica.it



Distributor criteria to select a winery

Criteri di selezione delle cantine partner:

- ▣ **Presenza di un progetto "value for money"** articolato in 4-5 referenze alto vendenti rivolte alla "pancia del mercato" (2-2.5 €/pezzo)
- ▣ Eventuale presenza di **una proposta più qualificata** rappresentata della media-ristorazione (3-5 €/pezzo)
- ▣ Presenza di una **proposta Prosecco** + una **proposta territoriale**
- ▣ **Supporto trade marketing**



Source: Survey on Beverage Distributors on Italian wine market by Progettica.it



after pandemic all has changed

	2020 vs 2019	2021 Q1 vs 2019 Q1
<i>On-trade wine sales</i>	-33,7%	-61,0%

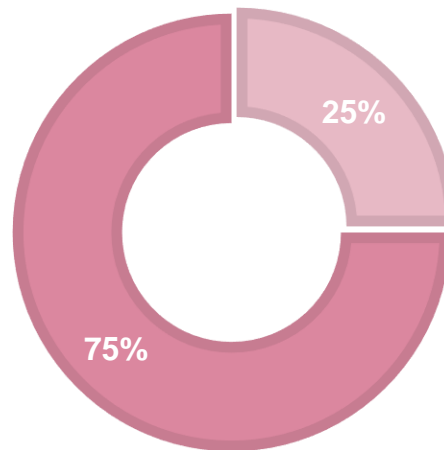
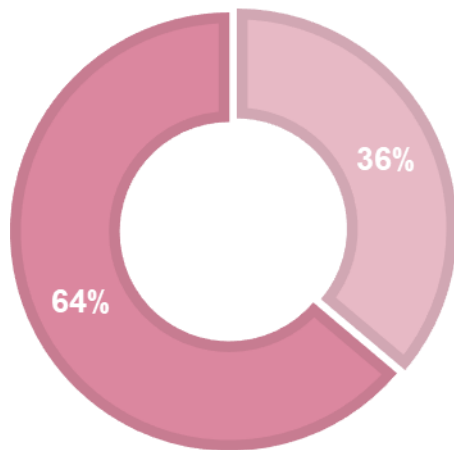
Source: Survey on Beverage Distributors on Italian wine market by Progettica.it

after pandemic all has changed

2019

(off-trade vs on-trade)

2020



Source: Survey on Beverage Distributors on Italian wine market by Progettica.it





future “on-trade” scenario...

- Less venues and less distributors
- Consumption styles and new products trend to be discovered yet
- Places of consumption to be redefined (impact of smart working)
- Digitization process of on-trade purchasing
- Delivery food impact (where the sales of wine is marginal)

Source: Survey on Beverage Distributors on Italian wine market by Progettica.it



THANKS

do you have any questions?

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