**Preview of Vino Nobile di Montepulciano**

**The renaissance of the first Italian DOCG thanks to sustainability, the “Pievi” labelling, market relaunch and promotion**

*A survey by the Consortium on "generation Z", tomorrow’s consumer*

Following the edition of 2021, which was necessarily curtailed due to the pandemic, the Preview of Vino Nobile di Montepulciano returns to normal, hosting trade journalists from all over the world and Italy in the Fortezza (March 24), as well as opening its doors once more to operators and wine enthusiasts who, from 26 to 28 March, will be able to attend personally and familiarize with the new vintages now available on the market. The Preview will be an opportunity to announce the rating of the 2021 vintage and to promote Vino Nobile di Montepulciano 2019 and the 2018 Reserves on sale from this year. On the morning of March 24, the “Giulio Gambelli ” Award, promoted by the Tuscan Food and Wine Press Association (Aset), also returns to Montepulciano.

**In 2020 and also in 2021, tourism started to pick up**, but with a number of novelties. Italians of all age groups were more numerous than in the past. In particular, Montepulciano witnessed the arrival of many young people, aged between 20 and 25, the so-called "Generation Z". For this reason, the Consortium and its members chose to carry out a market analysis on this new segment of "budding" consumers. According to the survey carried out by the Consortium in collaboration with Municipal Administration on a sample of more than half of its company members, it appears that 93% of them have already begun to receive inquiries from "Z" consumers, more than 70% of which are forwarded through online channels (private website or booking portals) , and 12.5% by word of mouth. The preferred type of visit, for 81.3% of consumers, consists of the company presentation followed by a tasting experience, while 15.6% choose the tasting experience alone. Among the main interests of “Generation Z” consumers are the vinification processes, but above all sustainability or the actions implemented by producers to safeguard the terroir and the environment. Consumer “Z” is apparently ‘very interested’ in this issue (23%), or quite interested (15%). The average expenditure of young consumers (50%) does not exceed 30 euros, but for 40.6% it may even reach 60 euros, while a lower percentage (9.4%) have a budget ranging from 61 to 100 Euros. To be prepared to deal with these new consumers, producers have implemented training activities: over 40% of respondents declare that they have organized specifically-targeted activities, in particular educational visits to the winery, with short courses held on the premises or online . According to 37% of the wineries interviewed, the average level of general knowledge on wine ranges from sufficient to medium-high. What are the new consumer trends? Rosé, sustainable and storytelling of wines, together with the possibility to purchase online.

**THE 2021 HARVEST**

2021 was characterized by a decidedly anomalous meteorological trend, both in terms of rainfall and some high temperature peaks recorded in spring. The total annual rainfall was 510 mm, a very low value, about 25% less than the average annual rainfall in the area. With regard to temperatures, the months that diverged significantly from the averages for the period were March and especially April, which recorded particularly low minimum values. In the night between 7 and 8 April, the temperature fell below freezing point for several hours, to as low as -7 ° C on the valley floors, causing serious damage to the opening buds. Budbreak took place from March 28 to April 27; flowering from 2 to 15 June and veraison from 27 July to 26 August. Harvesting was carried out from mid-September to early October.

**The wines of 2021**, tasted after malo-lactic fermentation, have very decisive colors, intense aromas dominated by hints of ripe fruit and a remarkable structure characterized by abundant tannins and good acidity. On an analytical level, high values of intensity and shades of color, alcohol, extracts and total polyphenols and average levels of acidity and pH are detected.

**Vino Nobile di Montepulciano “Pieve”: the future vintages are already in the cellar.** There are over 40 producers of Vino Nobile di Montepulciano who have selected a batch of Vino Nobile di Montepulciano from the 2021 harvest destined to become a "Pieve" . . Approximately 500 thousand bottles are expected to be released for the first available vintage (2024), equivalent to roughly 10% of the production of Vino Nobile di Montepulciano. With regard to last year, when the specification was presented, following a positive resolution by the regional authorities of Tuscany (first step of the process), the Consortium is now waiting for the final go-ahead from the Wines Committee of the Ministry of Agricultural, Food and Forestry Policies.

The idea to create a special Vino Nobile di Montepulciano with the "Pieve" wording on the label (the disciplinary rules currently contemplate Vino Nobile di Montepulciano and Vino Nobile di Montepulciano Riserva), derives from a methodological experience involving the consent and participation of all producers. A research project within the denomination itself, which thanks to meetings, comparative studies and collective analyses, has led to the conception of a shared "vision" of Vino Nobile di Montepulciano. A vision that is also supported by the research of wine experts. On the one hand, we have implemented a geological and pedological research process, a topic dear to the Consortium ever since the 90s, (we were among the first in Italy to divide the production terroir into zones and subsequently map it in the Enogea format); on the other hand, studies were also carried out in the libraries and historical archives, as far back as the Leopoldino Cadastre of 1800.

**The disciplinary rules: from drafting to the approval destination 2024.** A wine that will have the characteristics of the terroir (with relative sub-zones), a blend containing Sangiovese and only the complementary autochthonous grape varieties approved by the specification with grapes exclusively produced by the bottling company. The other novelty is that an internal commission will be set up within the Consortium, made up of oenologists and technicians, who will be in charge of evaluating the characteristics and ensuring that they comply with the disciplinary rules, before enacting the subsequent steps in the procedure.

**The "pievi" also set out to characterize the territorial properties of wine.** A historical study of the local geology and geography has led to the identification of 12 areas, defined in the UGA (Additional Geographical Units) production specification, to be preceded by the "Pieve" mention on the label. This aspect represents the identity of Vino Nobile di Montepulciano which is firmly rooted in the past. The decision to use local place names associated with the ancient Parishes into which the land had been divided since the late Roman and Langobardic times, stems from in-depth studies into history, landscape and wine production. The Consortium for Vino Nobile di Montepulciano is particularly keen to reaffirm and codify a physical reality with ancient historical roots, which characterized the Poliziano territory up to the modern era and is also reflected in the Leopoldino land registry relating to the early decades of the XIX century, which divided the territory into sub-areas identified by a place name.

**Sustainability: Valoritalia ready to certify the terroir of the Vino Nobile di Montepulciano denomination with the EQUALITAS standard.** The Vino Nobile di Montepulciano Consortium has decided to strengthen its commitment to sustainable development, and has appointed Valoritalia to certify the sustainability of the protected denominations with the “Equalitas” protocol. This decision was taken at the end of a process lasting several years , which entailed the active participation of most of the Consortium members, allowing them to mature and share a decision destined to have a strong impact on the future development of the production area. The first step in the certification process should be completed within the first half of 2022 and will allow Vino Nobile di Montepulciano and Rosso di Montepulciano to become the first sustainable Italian denominations. To achieve this goal, more than 70% of companies have already invested in sustainable projects, while 90% have ongoing plant construction projects. More in detail, over 70% of Vino Nobile di Montepulciano producers have a photovoltaic system and 35% are equipped with solar thermal plants for heat production. 20% have wastewater recovery systems, while 10% of producers have invested in geothermal energy. In recent years, about half of the farms have developed natural farming methods, such as fertilization, grassing, and the use of less impacting crop growing methods. This is linked to the concept of biodiversity and, in this respect, most of the Vino Nobile producers practise organic farming, while some are even engaged in biodynamic farming.

**ECOBOX PROJECT FOR TAKE AWAY**

**Certified wood for the wine industry: agreement with PEFC Italy.** The activity contemplated in the memorandum of intent with PEFC Italia continues thelatter is a non-profit and non-governmental organization, committed to promoting sustainable forest management through independent third-party certification. In brief, the agreement provides for the promotion of training and awareness campaigns targeting potential operators in the wine-growing and vinification businesses with regard to the potential benefits for present and future generations deriving from the mindful use of certified products, that is to say, the protection of forests and their ecosystem services. In practice, the two parties undertake to encourage companies to make conscious choices, also by using certified materials that protect our forest heritage, while ensuring the legality and sustainability of forest-sourced materials (wood, paper, cardboard and cork). In fact, products with PEFC certification guarantee that raw materials have been sourced from responsibly managed forests, with the obligation to replant the felled trees, and the forests maintain high levels of ecosystem services such as climate change mitigation. In fact the protocol provides for support to be given to producers, in order to inform them about the existence and potential of the use of products deriving from certified, sustainable and legal supply chains, together with the communication of the values intrinsic in the use of sustainable products which may confer added value to the wine production itself, starting from the use of wooden packaging and production tools (such as barrels or vineyard stakes). The partnership also undertakes to develop marketing and information tools targeting the end-consumer in order to promote awareness of the high social and environmental impact deriving from a particular attention to the use of sustainable local products with low environmental impact, and to develop projects aimed at reducing their CO2 emissions or the adoption of certified forest projects to neutralize residual emissions, while promoting their positive impact through specific communications to the consumer. This is an important step, considering the extensive use of wood elements also in Montepulciano’s wine production chain.

**ALL THE NUMBERS RELATING TO NOBILE DI MONTEPULCIANO**

**The “Noble” heritage.** Approximately one billion euros. This is the estimated value of Vino Nobile di Montepulciano comprising assets, sales, and production. About 65 million Euros is the average annual value of wine production, not to mention the fact that about 70% of the local economy pivots around wine production. This is an important figure for a Municipality of 16,500 hectares, in which about 2,000 hectares are planted with vines, and roughly 16% of the local landscape is characterized by vineyards. Of these, 1,210 hectares are engaged in the production of Vino Nobile di Montepulciano Docg, while 305 hectares grow Rosso di Montepulciano Doc. Over 250 winegrowers cultivate these vineyards (of an approximate number of 90 bottlers, 75 are associated with the Consortium of producers). About one thousand permanent workers are employed by the wine trade in Montepulciano, flanked by an equal number of seasonal workers. In 2021, 6.8 million bottles of Vino Nobile were placed on the market (+ 21.4% compared to 2020) along with 2.6 million bottles of Rosso di Montepulciano (+ 6.4% compared to 2020).

**The market.** 2021 was an important year for Vino Nobile di Montepulciano especially when compared to the previous one, characterized by restaurant closures and a drop in exports. The domestic market recorded a significant rise in demand forVino Nobile di Montepulciano. Exports, which nevertheless remain the main sales channel, accounted for 70% of total sales (in previous years they had amounted to 78%), while the remaining 30% is marketed on the domestic market. Direct sales effected by the producers have continued to grow in recent years, reaching 30% in 2021. As regards the national market, 40% of sales are attributable to Tuscany. 34.4% is sold in the northern regions of Italy (+ 20% compared to 2019). As to exports, the pie is split twoways between Europe and non-EU countries. Germany continues to be the most important export market for Nobile with 39% of the share. The second target market is the United States, accounting for 26% of the Vino Nobile di Montepulciano exported (+ 4% compared to 2019). The Asian, Balkan and non-EU markets also show positive results, accounting for over 4% of exports. The growth trend of Canada continues, which alone is worth 4% of exports. A truly significant figure is the market share of the organic brand of Vino Nobile di Montepulciano which is worth 42% of sales on the Italian scene, while it represents 69% on international markets. A figure that also reflects organic production in Montepulciano (more than half of the members of the Consortium have already gone organic or are in the process of conversion) and goes in the direction of Equalitas certification.