GARDA
DOC

GARDA WINE STORIES


GARDA
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Legenda
RIVIERA VALTENESI
LUGANA
SAN MARTINO DELLA BATTAGLIA
COLLI MANTOVANI
CUSTOZA
BARDOLINO
VALDADIGE TERRADEIFORTI
VALPOLICELLA
SOAVE
MONTI LESSINI
RIVIERA VALTENESI
BRESCIA
Padenghe
BARDOLINO
Lazise
VALDADIGE TERRADEIFORTI
VALPOLICELLA
MONTI LESSINI
SOAVE
Soave
VERONA
LUGANA
S. MARTINO D. BATTAGLIA
CUSTOZA
Monzambano
COLLI MANTOVANI
MANTOVA

1. GARDA DOC: OUR STORY

1968: first year the geographical term 'Garda' is used on labels of wines from the Garda region.
1996: the DOC (controlled appellation of origin) is recognised for varietal wines and the Consortium is created voluntarily by local producers (consorzio volontario). Production area: delimited area comprising the 10 historical appellations around the lake in the provinces of Brescia, Mantova and Verona.
2015: the Consortium covers enough of the production area to be recognised by ministerial decree and become a legal entity (consorzio di tutela).

2016: new production regulations are approved.

2017: first sparkling wine production in the province of Verona using the Charmat method.

31,100: total number of hectares suitable for winegrowing in the 10 historical appellations.

1,800: number of hectares used to produce Garda DOC wines.

250: number of producers who make and bottle their own wine ('vertical producers') and cooperative wineries that use the appellation.

20 million: number of bottles produced in a year (consolidated and growing).

Types of wine allowed by the production regulations:

Still varietal wines
Pinot Bianco, Pinot Grigio, Chardonnay, Riesling B., Sauvignon, Cortese, Cabernet Sauvignon, Merlot, Corvina, Pinot Nero, Marzemino (the varieties in bold have a stronger presence on the market)

Still wines obtained by mixing different grapes or blending different wines:
White (Garganega, Chardonnay, Pinot Grigio and Trebbiano)
Red (Merlot, Cabernet, Corvina, Marzemino, Rebo)

Charmat method sparkling wines, mainly varietal
White (Garganega, Trebbiano di Lugana, Pinot Grigio)

Classic method sparkling wines, mainly cuvée
White (Chardonnay, Pinot Nero, Corvina)
Rosé (Marzemino, Corvina, Pinot Nero)

2. THE GARDA APPELLATION – TODAY

Recognised in 1996, the Garda DOC appellation covers a broad geographical area that includes a good part of the Alpine arc that surrounds Lake Garda, bringing together historical wine production areas in the provinces of Brescia, Mantova and Verona. The area under vine totals around 31,100 hectares, most of which lies in the province of Verona, while the remaining 3,211 hectares are spread between the provinces of Mantova and Brescia.

The Garda DOC appellation was created with the aim of enhancing the value of varietal wines. Sparkling wines and red and white wines under the 'Rosso' and 'Bianco' designations are more recent additions to the local production.

There are eight main grape varieties grown in the area, four white: Garganega, Trebbiano (Trebbiano di Soave and/or Trebbiano di Lugana), Chardonnay and Pinot Grigio; and four red: Corvina, Marzemino, Merlot and Cabernet Sauvignon. There is also a range of native varieties found in the area. All these varieties form the backbone of Garda DOC, generating significant production that creates a market.

3. THE GARDA APPELLATION – IN THE PAST

Wine production in the Lake Garda region from 1968 to the present day: from geographical mention (1968-1995) to controlled appellation of origin (DOC) (1996)

Geographically speaking, Lake Garda's wine production can be divided into four large parts:

1) the eastern part: red wines.

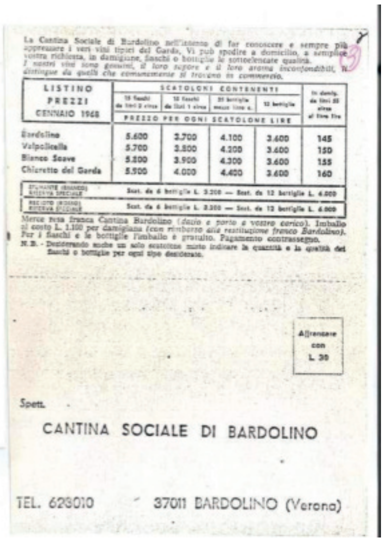
The red wines produced here used to go by the name of the town they came from, such as Lazise, Calmasino and Bardolino. Of these names, the only one that now remains is Bardolino, thanks to its extensive renown, with the Bardolino DOC appellation being used for its red wines and 'Chiaretto di Bardolino' for the rosés.

2) The southern part, between Peschiera and Desenzano: white wines.

The white wines produced here come from the historical Lugana and San Martino della Battaglia appellations, and today Lugana is one of the biggest productions.

3) the western part: red and rosé (Chiaretto) wines.

Wines designated with the name 'Riviera del Garda' were already being produced here years ago, while today there is another appellation, Valtènesi, that has been added exclusively for the rosé wines.



La Cantina Sociale di Bardolino nell'intento di far conoscere e sempre più apprezzare i veri vini tipici del Garda, Vi può spedire a domicilio, a semplice vostra richiesta, in damigiane, fiaschi o bottiglie le sottoelencate qualità. I nostri vini sono genuini, il loro sapore e il loro aroma inconfondibili, li distingue da quelli che comunemente si trovano in commercio.

LISTINO PREZZI GENNAIO 1968	SCATOLONI CONTENENTI				In damig. da litri 25 circa al litro lire
	[illegible] fiaschi da litri 2 circa	[illegible] fiaschi da litri 1 circa	[illegible] bottiglie mezzo litro c.	12 bottiglie	
	PREZZO PER OGNI SCATOLONE LIRE				
Bardolino	5.600	3.700	4.100	3.600	145
Valpolicella	5.700	3.800	4.200	3.600	150
Bianco Soave	5.200	3.900	4.300	3.600	155
Chiaretto del Garda	5.500	4.000	4.400	3.600	160
SPUMANTE (BIANCO) RISERVA SPECIALE	Scat. da 6 bottiglie L. 3.200 — Scat. da 12 bottiglie L. 6.000				
RECIOTO (ROSSO) RISERVA SPECIALE	Scat. da 6 bottiglie L. 3.300 — Scat. da 12 bottiglie L. 6.000				

Merce resa franca Cantina Bardolino (dazio e porto a vostro carico). Imballo al costo L. 1.100 per damigiana (con rimborso alla restituzione franco Bardolino). Per i fiaschi e le bottiglie l'imballo è gratuito. Pagamento contrassegno.
N.B. - Desiderando anche un solo scatolone misto indicare la quantità e la qualità dei fiaschi o bottiglie per ogni tipo desiderato.

Affrancare con L. 30

Spett.
CANTINA SOCIALE DI BARDOLINO
TEL. 623010 37011 BARDOLINO (Verona)

Wine production map from 1968

1968: example of the use of the geographical mention 'Garda'
1976: Agreement of the Chamber of Commerce, Industry, Agriculture and Artisanship of Brescia, Trento and Verona for recognition of the geographical mention 'Garda'

4. GEO-PEDOCLIMATIC CONTEXT OF THE APPELLATION

The vineyards mainly grow in morainic agglomerate soils that show little differentiation in terms of their pedological profile. The soils are generally stony, rich in rock fragments and highly calcareous, but with low levels of active lime. In most cases, they are moderately deep and do not retain water well due to their coarse texture and poor structure.

EASTERN ZONE

VERONESE MORAINIC AREA

The most common soil types are as follows:

- soils formed on calcarenites (Negrar, Marano, Fumane, Sant'Ambrogio, San Pietro in Cariano);
- soils made up of marly limestone (known locally as biancone and scaglia), on man-made terraces at medium-low altitudes;
- compact red soils on Eocene limestones, mainly present in the easternmost sector (Valpantena, Valsquaranto, Mezzane);
- compact red soils on basalts, in defined areas, in the high hills (valleys in Negrar and Marano).

COLLUVIAL AREA – **Lessinia and Illasi**
The hill area is characterised by carbonate rocks (scaglia rossa and nummulite limestone) and, secondarily, by basalts, the result of underwater volcanic activity affecting the Lessini Mountains.

- Soils of calcareous origin: moderately deep for the most part, with little stoniness and a clay loam texture, and with a high lime and common rock fragment content;
- soils of volcanic origin: with a basic composition, formed mainly in an underwater environment. The volcaniclastic products have a characteristic yellow or yellow-brown-reddish colour due to the degree of oxidation of the environment in which they were formed.

SOUTH AND WEST – **ancient morainic and lake basin deposit area**

The most common soil types in this area are the result of Quaternary glacial activity. In the region between Brescia and Mantova (Mantua), morainic amphitheatres are present in two different areas:

- the north-eastern part;
- the south-western part down to the Mincio River.

Morainic bands can be distinguished in both areas, dating back to the Rissian and Würmian glaciations.

The shapes and relief of the bands vary greatly depending on their age; the more recent moraines are more distinct, characterised by steeper slopes and more well-defined shapes, while the older bands are softer and more rounded, appearing almost to 'sag' thanks to erosion phenomena.
The areas with a 'sunken' morphology correspond to ancient lake 'basins' with extremely clayey fine deposits.

5. GARDA'S MESOCLIMATE: THE NORTHERN MEDITERRANEAN SOUTH OF THE ALPS

The climate of the Garda DOC appellation overall is characterised by hot summers and relatively cold winters, while the rainfall is spread fairly evenly over the course of year.
The climatic conditions of the entire morainic amphitheatre are particularly suited to vine growing due to the mitigating effect of the lake, which is crossed almost daily by breezes that blow southwards in the morning and northwards in the afternoon. The winters are never harsh and the summers are never too hot. The diurnal swing—a factor that favours vine growing—is quite significant due to the lake breezes.
The annual average rainfall is spread rather evenly across three seasons, thus limiting the summer hydrological deficit. The area is somewhat subject to summer hail storms, which can be devastating and cause damage to the vineyards for two consecutive years.

6. THE THREE EFFECTS OF GARDA'S MESOCLIMATE ON VINE BEHAVIOUR

1) Increased temperatures result in increased production

Over the past 20 years, there has been an increase in temperature of around 1°C and an average decrease in rainfall of around 50-60 mm compared with the same timeframe.
Both of these factors favour vineyard productivity

2) Increased temperatures mean higher alcohol content

The increase in temperatures caused by climate change impacts many of the biological and physiological processes of living organisms. In fact, it has been statistically demonstrated that there is a correlation between increased temperatures and sugar content: higher temperatures favour higher alcoholic content, while lower temperatures favour acidity.

3) Intensification of the vines' metabolic activity

The interaction of the altered climatic factors leads to more intense metabolic activity for the vine, with more significant sugar synthesis. This means the grapes have a higher sugar content and, consequently, the wines have a higher alcohol content.

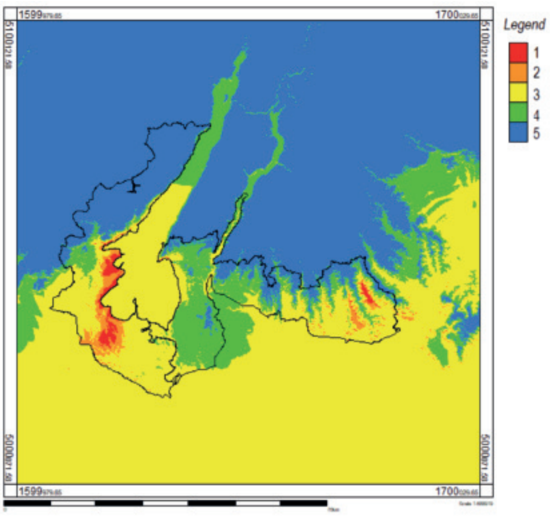
7. GARDA DOC'S APPROACH TO PRODUCTION

This trend, which is affecting many production areas, comes up against a market where consumers are looking for lower-alcohol wines that are more easy-drinking, fresher and more acidic.

Garda DOC has defined a clear approach in this vein: striking the right balance in the vineyard between the grapes produced there and the quality of those grapes. In other words, the balance of the vineyard, framed in this climatic context, becomes the key to unlocking the appellation's new approach to production to guarantee high-quality wines that can satisfy the tastes of today's consumers and, at the same time, ensure a fair economic return for the vine grower and the entire supply chain.

8. THE AGROCLIMACTIC CHARACTERISATION STUDY

(FROM A STUDY BY PROFESSOR MARIANI AND PROFESSOR FAILLA – UNIVERSITY OF MILAN)



*Map of the five areas suitable for red and white grapes.

This analysis has made it possible to describe the climate of the Garda DOC appellation in quantitative terms. The results confirm that the agroclimatic nature of the wine-producing area investigated make it a region suitable for high-quality winegrowing. This conclusion is supported by the analysis of both the climatic resources and the limiting climatic factors. These analyses reveal in particular the good or optimal levels of the radiation, thermal and precipitation resources, which stand around values similar to those in the best Italian and international wine-producing areas, while the limitations are not in any way able to jeopardise the wine-producing activity. The area presents considerable internal agroclimatic variability, which represents a source of diversity in winemaking terms, and this is undoubtedly valuable for the policies to develop, enhance the value of and communicate the appellation. In particular, the specific formation of the morainic reliefs and the water mass of the lake create a situation of asymmetry in the availability of thermal resources. The western strip of the southern lakeshore, with a marked southern extension, benefits from greater thermal resources, while the eastern area of southern Garda is characterised by a milder thermal regime. The lake's mitigating effect appears to also extend to the western part of the Valpolicella area. The southern area, on the other hand, does not seem to be influenced by the lake effect.

The levels of climatic risk and the inter-annual variability of the climatic resources make it advisable to continue carrying out the agrometeorlogical and phenological survey activities in close connection with the regional weather service and the other relevant services responsible for these aspects in the region.

9. THE LANDSCAPE OF GARDA AND ITS STRATEGIC IMPORTANCE

The winegrowing landscape of Garda DOC has a wealth of iconic features that enrich its biodiversity and appeal, making it distinctive and unique.
Vine growers have played a fundamental role in the landscape over the centuries: beyond growing vines to produce high-quality wines, their work has actually preserved a landscape and kept it intact, enabling the region's characteristic elements to turn into true icons of the landscape.
Particularly representative examples of these emblematic elements are:

- the parish churches known as pievi, an important cultural and landscape feature;
- the dry stone walls called marogne, testament to geological eras, professions and architectural value;
- the vegetation: cypresses, cherry trees, olive trees, caper bushes, lemon trees—all natural elements typical of a Mediterranean landscape and guardians of a rich biodiversity;
- the hills;
- the country roads that wind their way into valleys;
- the towns and villages that safeguard an ancient production tradition and simple rural architecture;
- the great lake.

This is why, in managing the vineyards, the preservation of the landscape is now proven to be a strategic factor for developing cultivation models capable of combining winegrowing tradition with technological innovation.

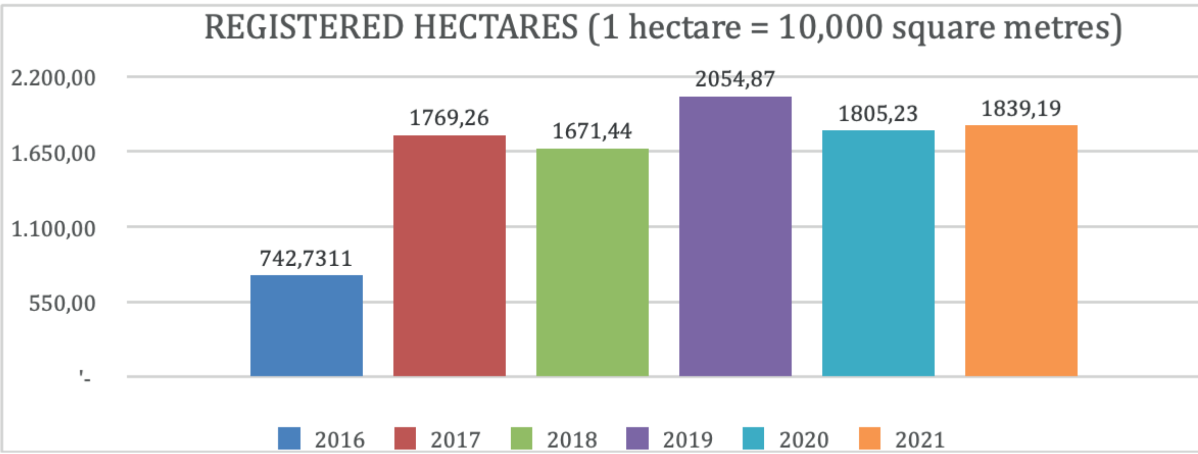
10. THE APPELLATION'S NUMBERS, FROM THE 2016 HARVEST TO MAY 2022

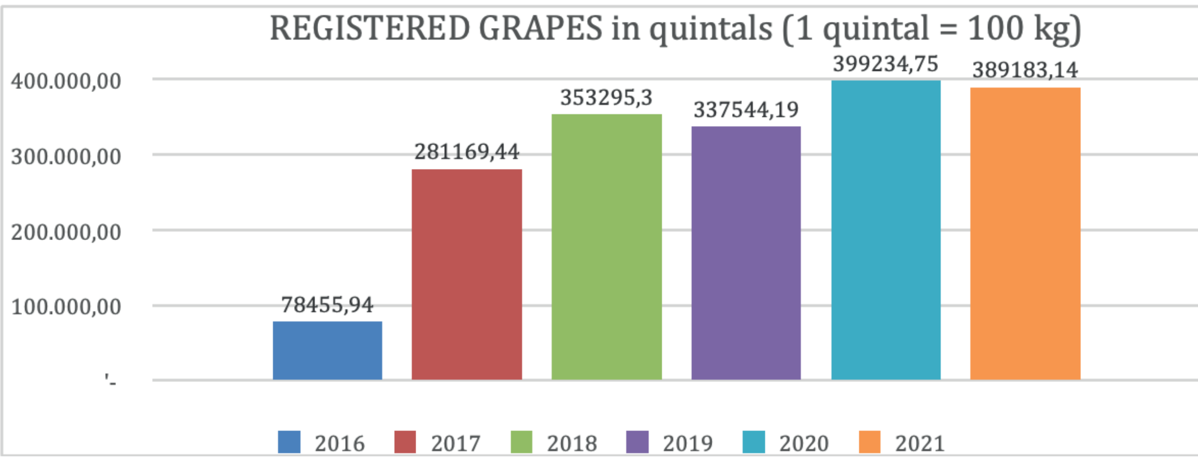
The tables and graphs below present the production numbers from the Garda appellation starting from the year 2016, when the production regulations were modified with the addition of white and rosé sparkling wines.

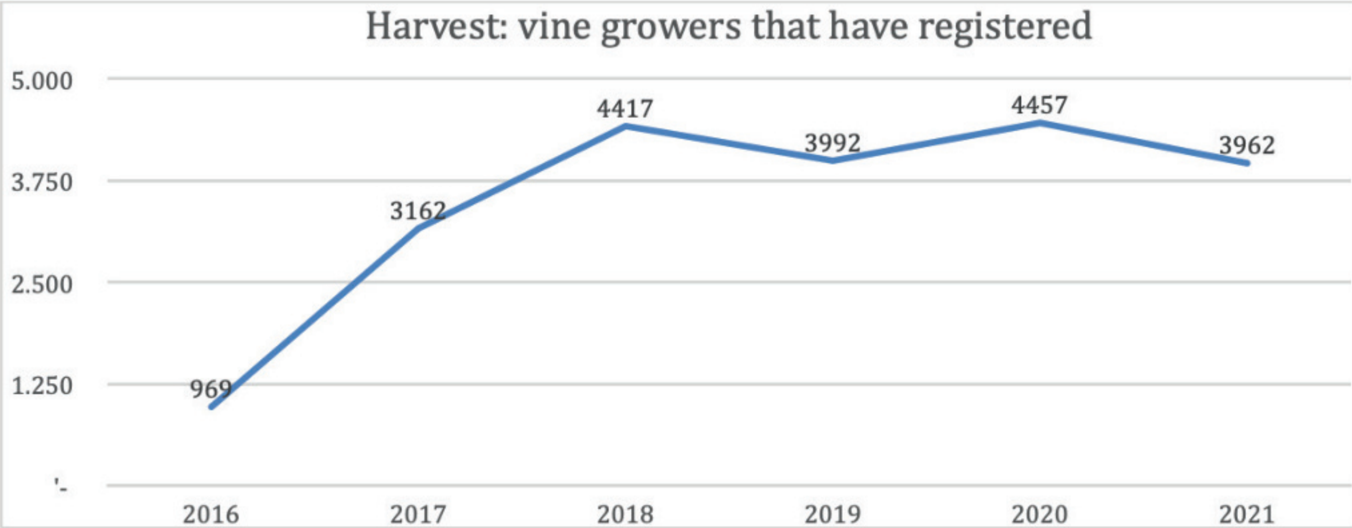
The appellation's numbers are constantly growing, with a stabilisation and slight drop in the last productive year, 2021.

The vineyard numbers

Starting with the 'field' data, there is already clear constant growth in the number of hectares registered with the Garda DOC Consortium (one hectare equals 10,000 square metres); in 2016, there were around 853 hectares registered, while by the last harvest season the number had more than doubled, reaching approximately 1,839 hectares claimed. In terms of the kilograms of grapes registered with the Consortium, there was growth in the production up to the 2020 season, followed by a slight decline in 2021.

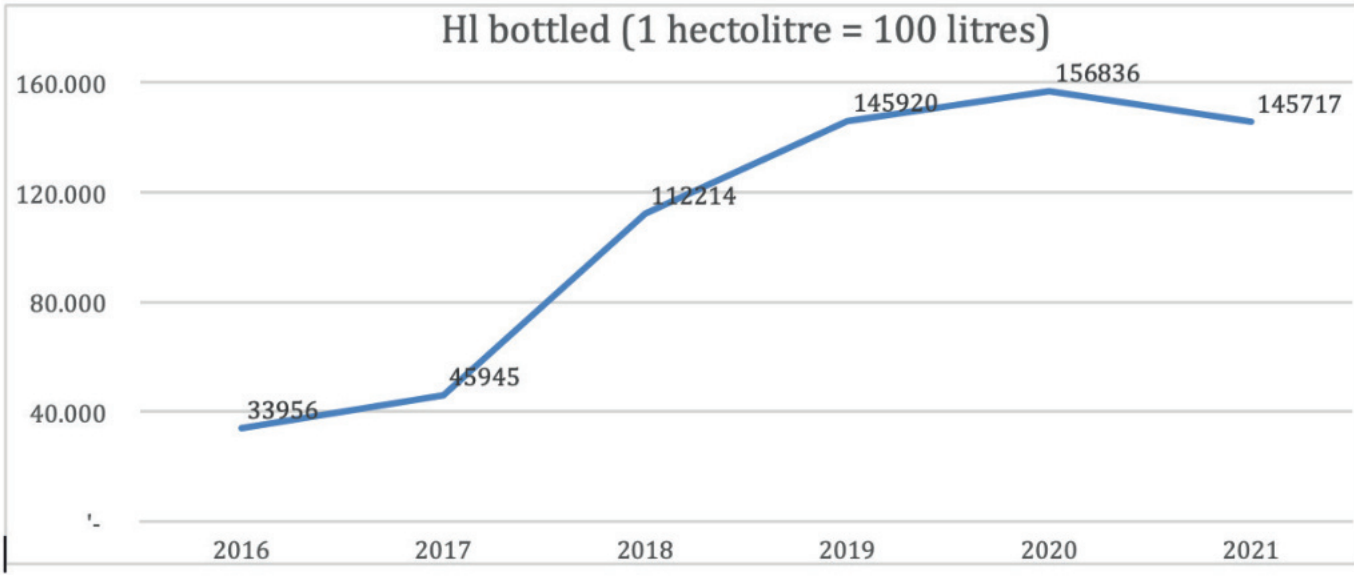


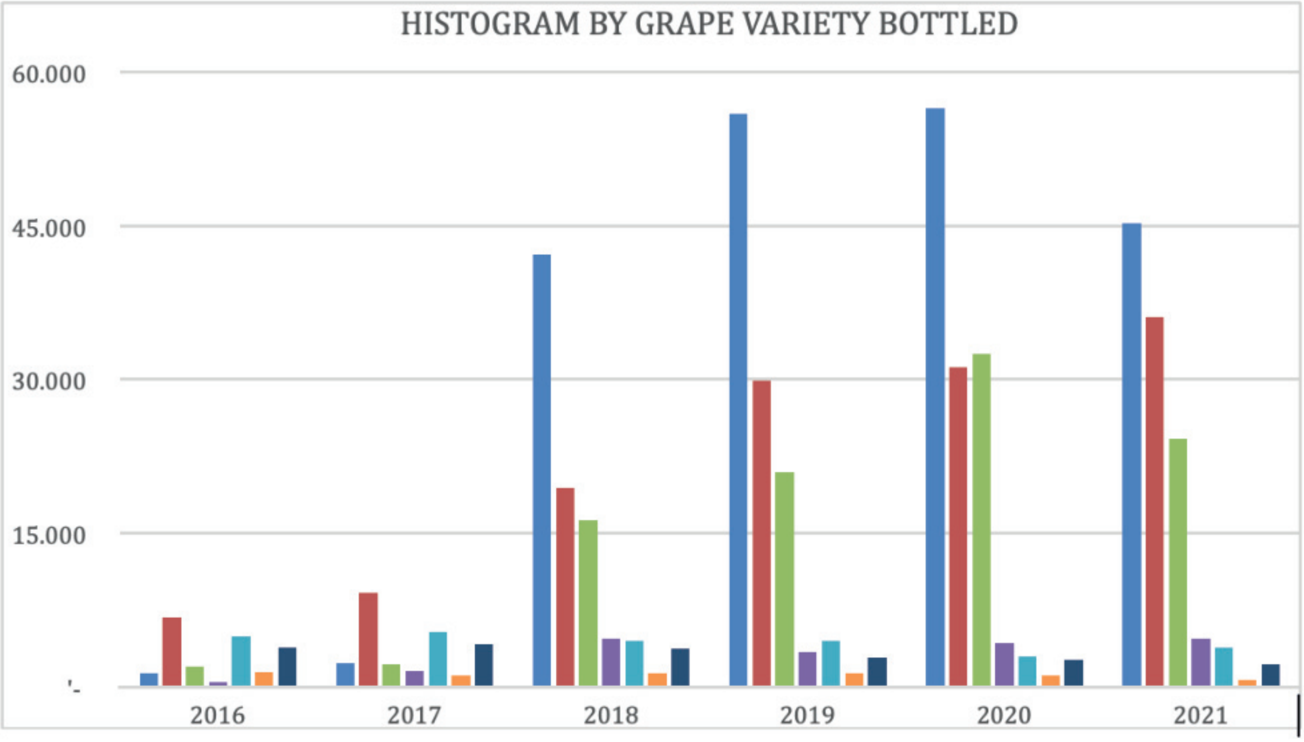


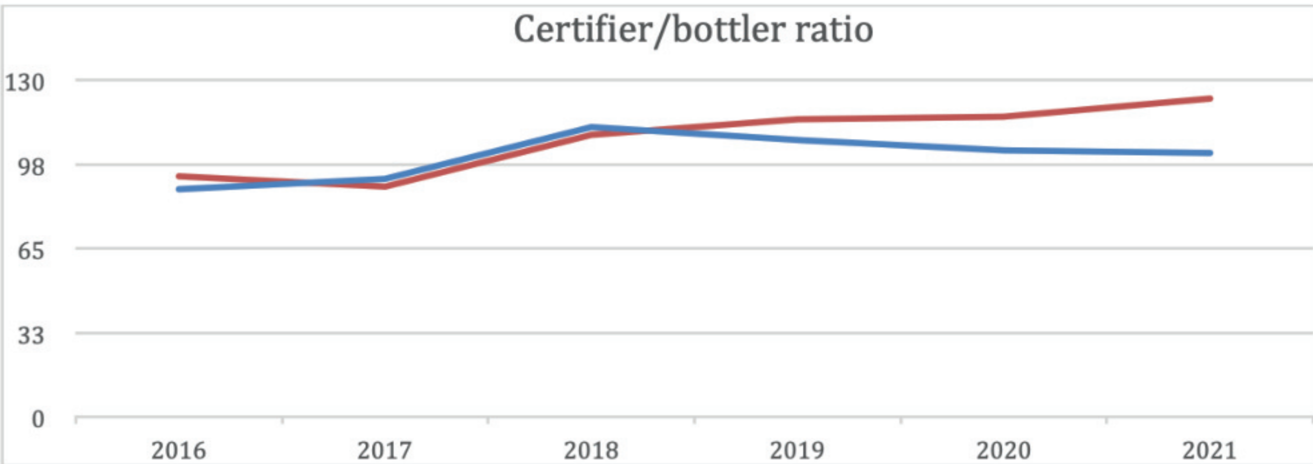


The winery numbers

In wine terms, the appellation has seen very significant growth between 2016 and 2020, while in 2021 there was a slight decrease in both the certified wine and bottled wine, mirroring the trend in the 'field' production. In 2016, the appellation started with a baseline of 34,000 hectolitres bottled (one hectolitre equals 100 litres), which had increased to 145,717 hectolitres by 2021. The most certified varieties are Garganega, Chardonnay, Pinot Grigio and Merlot. Sparkling wine is constantly growing, going from 428 hectolitres bottled in 2016 to 4,700 hectolitres in 2021. Below is a graph that compares the number of certifying producers (producers who certify their production under the Consortium umbrella) with the number of bottling producers.







certifying producers
bottling producers

*Overlap between certifying producers and bottlers working on a 'vertical' basis (making and bottling their own wines).

Market numbers		
Year	Hl (1 hectolitre = 100 litres)	Bottles (0.75 l volume)
2016	33,956	4,527,501
2017	45,945	6,126,103
2018	106,084	14,144,533
2019	130,329	17,377,200
2020	156,836	20,911,466
2021	145, 717	19,428,933

COMPARISON OF BOTTLING BY YEAR (figures in hectolitres)									
	2018	2019	2020	2021	2022	comparison 19/18	comparison 20/19	comparison 21/20	comparison 22/21
January	5,263	8,854	6,728	9,456	9,619	68%	-24%	41%	2%
Februar	13,510	20,560	20,786	18,834	26,346	52%	1%	-9%	40%
March	27,058	32,592	34,202	31,436	37,447	20%	5%	-9%	19%
April	35,152	46,315	46,556	43,455	48,136	32%	1%	-7%	11%
May	45,758	58,130	60,015	56,101		27%	3%	-7%	
June	54,837	68,998	69,702	68,209		26%	1%	-2%	
July	63,048	80,653	83,710	78,393		28%	4%	-6%	
August	72,202	88,733	92,154	87,530		23%	4%	-5%	
September	82,392	99,158	104,429	97,682		20%	5%	-6%	
October	90,296	110,17	113,49	107,55		22%	3%	-5%	
Novemb	98,005	121,65	124,41	115,07		24%	2%	-8%	

11. UK AND SWISS MARKET TRENDS: STUDY FROM THE ITALIAN WINE UNION (UIV) WINE OBSERVATORY – PROF. FLAMINI

General premise

The analysis comparing the official Italian National Institute of Statistics (Istat) data with the data from the Garda DOC Consortium on the UK and Swiss markets for the period 2019-2021 provides a good snapshot of the current situation.

In terms of the British market, there is a fairly good foothold and a positive evolution of Garda sparkling wines, going against the trend as regards the Istat reference aggregate (Italian sparkling wines). This positive performance comes within a context of increased consumption for the sparkling category as a whole, driven by large retailer sales, especially in the period marked by the lockdowns, i.e., throughout 2020. In terms of still wines, however, the market is stagnant, as might be expected for a market that is now mature for the main type of export, namely Pinot Grigio, which must be considered in the same way as a commodity, the leading product of supermarkets' private labels.

The opposite dynamics are seen in the Swiss market, where the sparkling category is flat, overshadowed by other categories, both premium (Classic method, e.g., Trentodoc and Franciacorta) and the more everyday segment (Prosecco). This is offset, however, by the good tendency of the still wines, both white and red, which have followed the generally positive trend of Veneto PDO (protected designation of origin) wines overall.

United Kingdom

In 2021, according to the Istat data, the exports of Italian wines and sparkling wines to the United Kingdom generated revenue of slightly more than 740 million euros overall, an increase compared to 2020—a year heavily influenced by the restrictive measures in the context of the pandemic emergency— but a decrease in comparison to the pre-Covid figure from 2019 (approx. 763 million euros). The volumes show a similar trend, with slightly more than 2.7 hectolitres shipped to the UK in 2021, compared with 2.8 million in 2019.
The negative dynamics should be interpreted in the light of the less favourable circumstances, especially in logistical, bureaucratic and administrative terms, attributable to the UK's exit from the European Union, which officially went into effect in 2020, the effects of which were felt only starting in 2021, however, following a transitional period of 12 months where there were no changes in the commercial relations between London and Brussels.
In 2019, sparkling wines represented the predominant category in turnover, with a 49% share of the total wine exports. In 2021, however, after falling by 8.7% compared with 2019, the share dropped below 46%, lower than that of bottled still wine (47.6%), the export of which grew by 1.8% in the same two-year period.
The exports of wine in formats larger than two litres and the slightly sparkling category are not particularly significant in the UK, although bulk wine, on the other hand, shows a positive dynamic that seems to indicate a more recent interest from local bottlers in doing business with their own brands or large retailers' private labels, and all the more so given the context of Brexit, which has made customs operations for EU products more complicated and costly as well as resulted in local consumers paying more attention to prices, in a context of greater inflationary pressure.
In terms of red wines, those from Tuscany and Piedmont have a higher sales volume in the UK compared with Veneto PDO red wines. Piedmontese wines purchased in the UK have an average price of 12-13 euros per litre, values that are significantly higher compared with the 5-6 euros for Tuscan wines and 5 euros for Veneto wines.
As for white wines, the British market shows a unit value well below the general average. The prices for Sicilian PDO wines are around 2.80 euros on average, compared to 1.63 euros for Veneto wines and 2.50 euros for white wines from Trentino-Alto Adige and Friuli-Venezia Giulia.
Analysing the volumes, there is an overwhelming presence of Veneto whites and Tuscan reds. The revenues for both regions and types of wine in 2021, however, have shown a negative change compared with 2020, while the sales of Sicilian, Trentino and Friulano white wines and Veneto and Piedmontese red wines are growing at a fairly brisk pace.

The analysis of Garda DOC wines

Focusing the analysis on wines from Garda, the dynamics from the past three years (2019-2021) show different trends between the sparkling and still wines. For the first category (Garda DOC sparkling white wine), against a backdrop of a rather marked decrease in both volumes and values in 2020, there was a significant recovery in exports observed in 2021, bringing both variables to higher levels than the pre-Covid figures from 2019. Over 186,000 litres were sent to the UK in 2021 compared with just over 119,000 litres in 2020 (+56%). In value terms, this means going from less than 358,000 euros to over 558,000 euros.
It should be noted that these dynamics appear to be in clear contrast with the export developments observed in the same period for the entire segment of Italian PDO sparkling wines, used for comparison (benchmark), which between 2019 and 2021 experienced a decline of 0.4% in volume and 7.4% in revenue in the UK.
Looking at the trend for still Garda wines, a positive trend emerges in 2020 in terms of both values and quantities, offset by a reduction for both variables in the following year. The final effect does not appear significant, however, considering that the comparison between 2021 and 2019 does

not show substantial changes in both real flows and economic equivalents, which at the end of the period stood at 845,000 hectolitres and 1.5 million euros, respectively.
The fairly flat dynamic of the still Garda wines is in contrast, however, to the positive evolution of the exports of the entire aggregate; using exports of Veneto PDO wines as the reference and considering bottled red and white wines, this benchmark saw increases of 12% in quantity and nearly 8% in value on the British market during the period in question.
Specifically, Garda Pinot Grigio closed 2021 with a better figure (+18%) compared with 2019, in terms of both value (over 744,000 euros) as well as physical movements (over 465,000 litres). The growth—albeit referring to much lower quantities and monetary equivalents—was clearly more pronounced for Garda Rosso and the Cabernets, while the Chardonnay closed with a drop of over 20%.
The other Garda varietals (Garganega, Corvina), which have overall revenues of 715,000 euros and a quantitative value of 376,000 euros (both figures referring to the 2021 vintage), have shown a slightly negative trend, closing with values and volumes falling around 5% compared with the 2019 figures.
In the UK, the value of still Garda wine exports represents around 2% of the total export revenue for bottled Veneto PDO wines on the British market. 2020 saw the highest share in the three-year period, equal to 3.5% (4.1% of the volume).

In this market, Garda DOC's initiatives are aimed at seeking an increase in value, in terms of both off-trade positioning and reputation, with the goal of presenting 'Garda DOC' as the new appellation with international production dynamics. Based on these objectives and the technical reports provided by the beneficiary, investment should be made along the lines of two main actions:

- on the one hand:
  - o tastings to present the best examples of Pinot Grigio and Chardonnay held by experts and renowned tasting journalists published in Decanter (the most prestigious and recognised wine magazine in the UK); and
  - o the organisation of direct masterclasses with select industry professionals, also guided by expert tasting journalists, in a webinar and during the Simply Italian Great Wines London event;
- on the other hand, the development of detailed videos on the region, aimed at the UK market and presented by an important Italian wine journalist recognised in the target market.

Switzerland

The Swiss market generates a turnover of over 400 million euros for Italian wines and sparkling wines every year and shows good dynamism, while also showing, in some respects, characteristics that are more similar to those of a mature market.
There has been steady growth in sales over the past three years, equal to 9%; however, this figure reflects, at least partially, the effect of favourable but contingent circumstances in the year following the first lockdown, considering, among other things, that the general dynamics of national wine exports appeared to be higher, with an increase of 10.6% in value between 2019 and 2021.
The erosion of market share, seen in the ratio between the value of wine exports to Switzerland and the entire Italian foreign revenue for the industry, dropped from a peak of 6% in 2020 to 5.8% the following year; this is observed across almost the entire line, but to a lesser extent for bottled still wines, a segment that makes up the bulk of the turnover in the Swiss market, with over 300 million euros in revenue.

For the Italian bottled still wine segment, moreover, the rate of growth of 9.7% observed in the period 2019-2021 is close to the 10.4% seen in general for bottled still wines, while the differential for sparkling wines appears to be wider, the exports of which to Switzerland saw an increase of 12.9%, compared with an overall increase of 15.4%.
The Swiss market has a high qualitative profile, with prestigious labels that, for some years now, concentrate an important market share. In quantitative terms, Switzerland receives 3.5% of the physical volumes of still and sparkling wines that Italy sells worldwide, while this market guarantees, as mentioned, around 6% of the export revenue. Another significant aspect is the very high average unit values, standing well above the threshold of 5 euros per litre (5.30 in 2021) and 2 euros higher than the general average value.
Red wines make up the driving segment, thanks to the thrust of the great wines that are highly regarded by local consumers. The Istat statistics attribute exports of over 45 million euros to Tuscan red wines (analysing only appellations of origin), in addition to 33 million for Veneto red wines and 20.5 million for Piedmontese reds (2021 figures). For white wines with appellation of origin, both traditional wines and the innovative wine segment are growing. The regions of Veneto, Trentino-Alto Adige and Friuli-Venezia Giulia stand out, with revenue in 2021 (excluding sparkling and slightly sparkling wines) of over 7 million euros, although sales of Sicilian wines are also growing, reaching 1.2 million euros.
Based on the results of recent market research, besides favouring high-end wines, Switzerland shows growing attention to organic and functional wines. The recent currency dynamics, which have led to a strong appreciation of the Swiss franc in the exchange rate with the euro, represent a further potential stimulus factor, effectively reducing the actual cost of purchasing Italian and European wines.

The analysis of Garda DOC wines

For Garda wines, the dynamics for the three years between 2019 and 2021 show a much better trend for the still wines as compared to sparkling wines. Analysing the sales in the Garda sparkling white wine category, there is quite a marked decrease in the two years between 2020 and 2021, resulting in a reduction in value of 41% by the end of the period with respect to the pre-Covid figure, without sparing volumes. From over 340,000 euros in revenue in 2019, exports fell to 201,000 euros, with a more pronounced drop (-38%) in the most critical year of the health emergency, i.e., during the first lockdown, whereas eh decrease in 2021 was much smaller (-4.9%).
The developments of exports observed in the same period for the whole aggregate of Italian PDO sparkling wines, used as the reference for comparison, reveal growth in value between 2019 and 2021 of nearly 18% and a 15.8% increase in quantitative terms.
In relation to exports of still Garda wines, like in the UK, a positive trend emerges in 2020, in terms of both values and quantities, offset by a reduction in both variables in the following year. The overall effect is positive in any case, considering that the comparison between 2021 and 2019 shows growth, in both real flows and economic equivalents, of over 5%, with the figures by the end of the period standing at 640,000 hectolitres and 1.2 million euros, respectively. The growth in monetary terms of still Garda wines contrasts with a positive evolution of the exports for the entire aggregate, considering all Veneto PDO wines, which in the period in question registered a very modest increase in Switzerland of barely 0.4%, instead showing a much more positive trend in terms of volumes (+14.8% between 2019 and 2021). Analysing the individual appellations, the figure for Garda Pinot Grigio stands out, which in Switzerland achieved a turnover in 2021 that was 33% higher than in 2019, with nearly 559,000 euros (310,000 litres in real terms). Garda Rosso, on the other hand, reached 34,000 euros in revenue, a figure that was 28% lower than in 2019. The aggregate of the Cabernets also fell, closing 2021 with one-third less in sales compared to 2019, while Chardonnay closed the three-year period with growth of 27% thanks to the strong progress made in 2021.
The data relating to the segment of the other Garda varietals (Garganega, Corvina, etc.), which in

Switzerland generate (2021 data) revenue of just under 600,000 euros, moving 307,000 hectolitres, showed an overall positive trend, closing with values and volumes up by 1.5% compared to the 2019 figure.
In Switzerland, the value of still Garda wine exports represents around 3% of the total export sales volume for bottled Veneto PDO wines. 2020 saw the highest share in the three-year period, equal to 5% (around 18% of the volume).

According to the objectives and strategies set out in the plan (promotional plan), in the Swiss market, the geographical proximity, in line with the presence of Swiss tourists in the Lake Garda region, has directed the initiatives towards developing the maximum diffusion of individual producers on the market. Based on what was reported by the beneficiary, the marketing of Garda DOC products sees a prevalence of direct distribution both to restaurants and to small distributors. Together with this, an off-trade market is also starting to open up for the Chardonnay and Pinot Grigio varietal wines and also the sparkling wines. For this reason, the Consortium has chosen Vinum as the main supplier for developing both technical masterclasses open to industry professionals and the media (journalists, influencers, bloggers), who can spread the Garda DOC message, as well as creating a dossier where all the best Garda DOC wines are presented, to bring consumers and all the participating producers together through this direct producer/consumer link (B2C).

Sources
Garda DOC Consortium
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Economic trend study – Prof. Flamini – Wine Observatory – Italian Wine Union

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