

SICILY'S RAPID EXPANSION

As Sicily establishes itself in the international wine trade, quality is rising, indigenous varieties are flourishing, and more people are moving in. But there are challenges to overcome, including the cost of production and logistics, says Michèle Shah.

In the last 35 years Sicilian wines have increased their reputation for quality both within Italy and internationally. Between 2003 and 2010 exports grew by 22%. Sicily now produces wines with flavour and elegance and enjoys a stable presence in all international markets. Their appeal lies in the combination of a sunny Mediterranean character with the crispness and pleasantness of the fruit, which fits the profile of what modern consumers are looking for. As Bernhard Wolff, head of BASF Wine Cellar in Germany, puts it: "Nowadays, the modern red wine style with soft tannins is the most wanted type of red wine."

The big question is whether Sicily can overcome some of its internal challenges, including cost of production and the consequences of rapid expansion.

The region at a glance

Sicily's vineyards cover a total of 112,725 ha plus around 19,000 ha in holdings, of which 71,967 ha (63.8%) are planted to white and 40,508 ha (36.2%) are planted to red. The emblem of Sicilian wine by far and large in terms of plantings and popularity is still the red Nero d'Avola (just over 30,000 ha), and the white indigenous variety Catarratto (just over 18,000 ha). Sicily's main areas of production can be found in the provinces of Trapani, Agrigento and Palermo. Sicily counts 24 DOC areas of production and one DOCG Cerasuolo di Vittoria.

An important step in identifying Sicily's regionality on its labels is the new DOC Sicilia, instated in 2012, and to be officially recognized by the Italian Ministry in 2014, to be used throughout the island's production. "The aim of the new DOC Sicilia is to identify the product with the region

of origin, enabling Sicily's production to be instantly recognizable," says Antonio Rallo, CEO of Donnafugata winery and president of Consorzio Vini DOC Sicilia.

Gaining this recognition will be crucial for building the region's identity.

"Many of the best Sicilian wines emphasize the producer and are labeled with either vineyard or fantasy names instead of varietals and region, so the trade and the consumer cannot immediately identify where the wines are from or which grapes have been used," says Leonardo LoCascio, CEO of Winebow in the US.

Another concern is the amount of Sicilian wines still bottled outside Sicily. In 2012 Sicily produced 5.1 m hL of wine, of which 3m hL were bottled under the DOC and IGP denominations, according to IRVO, Sicily's institute for wine and viticulture. Rallo says 60% of Sicilian wine is bottled in Sicily and 40% is still bottled outside the island. "Part of the DOC Sicilia's mandate will be to guarantee quality standards and to collectively communicate and promote Brand Sicily."

Sicilian style



**Lars Helliesen, CEO
Gaia Wines & Spirit**

Sicily likes to classify itself as a 'continent'. Though a mountainous island, only 5% of its vineyards are to be found at altitude, most of them on Mount Etna, yet Sicily's soil diversity, its five-month-long harvest, its range of climates, and the influence of the sea, make it a self-contained 'continent' with a wealth of indigenous varietals.

"Just consider the differences in terroir and viticulture between Etna, Vittoria, Ulmo, Noto, Marsala, Pantelleria, the Lipari islands, Agrigento and so on," says Lars Helliesen, owner and CEO of Gaia Wine & Spirits, Norway's leading importer of Italian fine wine. "To focus on indig-

enous grapes and their terroir is important - and then always focus on quality. Sicily has great potential as a region, but also the individual sub-regions have great potential to stand out and present their uniqueness."

Though international varietals have done well in Sicily, many winemakers have concentrated on making excellent wines from indigenous grapes. "To Norwegian wine enthusiasts, the white Carricante of Etna is probably the most well known Sicilian white grape," says Helliesen, "but Grecanico, Grillo, Insolia, Zibibbo and others have great potential in their respective terroirs. For the reds, the Nero d'Avola of course is the most well known, but local varieties - like the Frappato di Vittoria and the Nerellos of Etna - has an increasing group of followers in our market."

Nero d'Avola, Sicily's main red variety, does well in most of its appellation areas because it is a terroir wine, changing its character depending on where it is planted. If you are looking to produce a modern style of wine, characterized by a rounded, fruity appeal and easy drinking, then Menfi and Sambuca in western Sicily are the best areas to plant Nero d'Avola, whereas if you are looking for a more complex Cru showing elegance, aromas and acidity with good ageing potential, then the areas of Noto, Vittoria and Ragusa in the southeast are excellent areas.

"I am convinced that Nero d'Avola has enormous potential in the international arena," says Francesca Curto, export manager of Azienda Curto. "It's up to the new generation of producers to establish a methodical marketing strategy to promote Nero d'Avola as a brand." The Curto winery, a family estate in the traditionally historic areas of Ragusa and Siracusa, is among Sicily's emerging wineries, known for its handcrafted, age-worthy Nero d'Avola. Production is limited to 30 ha and 100,000 bottles, of which 80% are



**Francesca Curto
export manager,
Azienda Curto**



Italy's largest companies, such as Zonin - which produces the Delibella - have been quick to see the potential in Sicily.



Fabio Sireci
Feudo Montoni

exported to major markets in Europe and the US. This area of production is best known for its bush-trained vines, which have adapted perfectly to the often hot and arid microclimate.

Contea di Sclafani in the centre of Sicily is another area with excellent potential, yielding age-worthy, structured Nero d'Avola characterised by bold fruit. Fabio Sireci's 25 ha of 50- to 80-year-old bush-trained vines at Feudo Montoni in the DOC Contea di Sclafani, planted to an altitude of 800 metres were identified by Giacomo Tachis, Italy's most prestigious winemaker, as the cradle of Nero d'Avola and the

place to find its purest genetic expression. Yet, says Sireci, the grape has not achieved the recognition it should.

"Nero d'Avola is one of Sicily's best known varieties with positive and negative implications," says Sireci. "Its image as one of Sicily's main brand wines has been badly handled. It should be the red flagship wine of Sicily, but the fact is, today you can find Nero d'Avola for as little as one euro, which for those producing quality Nero d'Avola makes it difficult to explain and almost counterproductive to admit to producing Nero d'Avola."

Among Sicily's indigenous grapes, Perricone and Nerello Mascalese figure among Sicily's 'trendy' 'ancient' red varieties. Perricone, characterised by intense ruby red colour, a medium body, and moderate tannins, is a lesser-known small production typical of Western Sicily, used in small percentages to blend or as a mono-varietal.

Nerello Mascalese can be found on the unique volcanic slopes of Etna. Its terraced vineyards of ancient bush-trained vines produce wines of depth and finesse characterised by minerality and elegance. Top bottlings of Etna Rosso DOC are made from Nerello Mascalese and Nerello Cappuccio, while Etna Bianco DOC is made predominantly with Carricante grapes.

The region's main concern today is that of curtailing production to maintain its quality status and the 'uniqueness' it enjoys. From a mere handful of producers some 10 years ago, there are over 70 estates bottling and labelling wines today. Every Sicilian producer with a name wants a slice of Etna, which means Etna could lose some of its uniqueness.

Yet Etna wines are not for the mass-market and it is emerging wineries such as Tenuta di Fessina, a 70,000-bottle production established in 2007 in the commune of Castiglione di Sicilia at an altitude of 670 metres, owned by Tuscan producer Silvia Maestrelli and Piemonte-born agronomist Federico Curtaz that will show the way. Their philosophy, according to Maestrelli, is to seek a genuine expression of terroir by intense manual labour, keeping yields low and by respecting nature.

Planeta, one of Sicily's benchmark wineries, recently acquired a relatively large 20-ha vineyard on Etna. "Etna is magnificent, and it will be protected by a natural selection led by the market, selecting those producers who make it and those who don't make it," says Alessio Planeta, winemaker of Planeta. According to Alessio, very little has changed on Etna over the centuries, yet what makes production quite diverse is its many exposures and climatic conditions, which are quite different from side to side of the volcano. "It is a mysterious land true to nature, indigenous varieties and tradition. This is what gives Etna its strength," says Planeta.

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The principle differences among the terroirs mainly concern the altitude, exposure to sunlight, the exposure to the sea, and the structure of the soil. The south-western slope has no exposure to the sea and is less rainy, while the vineyards are at high altitudes and therefore the temperature excursions are significant. The grapes always reach complete maturation. The south-eastern slope is at a lower altitude with ideal exposure to sunlight and constant ventilation. Temperature excursions are less extreme and maturation is gradual and ripeness complete. The eastern slope is characterised by altitude, higher rainfalls and soils with significant draining capacity. Temperature excursions are significant but mitigated by the exposure to the sea. The northern slope is less influenced by the sea. It is rainy and cooler and with high altitudes and significant temperature excursions.

Old grapes with a future

The Benanti Winery, with a production of 120,000 bottles and 25 ha of vineyards on Etna's different slopes, is one of Etna's historic wineries. Antonio Benanti, the president, suggests that the red Nerello Mascalese has a strong future. "In our opinion Nerello Mascalese is not yet the symbol of Sicilian wine," he says, though adds it is gaining popularity and recognition and will eventually become highly sought after. Benanti believes the biggest risk to Etna will be if the new players rush to release "their products to the market in order to establish a presence, something that savvy consumers will be able to discern."

From the province of Trapani, Grillo, a traditional white varietal that was once the backbone of DOC Marsala, is enjoying a revival as one of Sicily's most interesting indigenous white varietals. Grillo has a dense straw yellow colour, and a good aromatic bouquet, with traces of herbaceous and floral scents and notes of citrus. On the palate it is full-bodied, with a good acidity, a balanced softness, and excellent taste structure. "Over the last 10 years, Grillo has made a name for itself within international markets by slowly building up its reputation as a wine of structure and character," says Mario di Lorenzo owner of Feudo Disisa. "What producers must understand is that we need to offer consistent quality identifiable with Sicilian terroir."

Grillo was traditionally used to produce the fortified wine Marsala, a style that is in decline, with the exception of a Marco de Bartoli's niche

version. "In order for Marsala to survive, a new generation of producers needs to come to some agreement on renewing appellation regulations. We need to revamp the interpretation of this wine," says Renato de Bartoli, adding that better promotion is also required.

Sicily in the world

"Sicily will become a 'must category' that reputable restaurants will want to have on their wine lists, that importer's will want in their portfolios and supermarkets will place prominently on their shelves," says Alessio Planeta.

Sergio de Luca, CEO of the UK's Enotria, which is Planeta's agent, agrees, saying there is great potential for Sicily to expand in the UK market, while BASF's Wine Cellar head Wolff says that his company now has 12 Sicilian wines in its portfolio, and is exporting them to colleagues in Asia and the US.

There are still improvements to be made in quality, particularly where indigenous grapes are concerned; there are still soil surveys and studies to be done to see which variety fits best within its soils and exposures. Trade

and promotional activities need to be targeted towards education and getting industry leaders to visit Sicily to fully understand the richness of the wine heritage there and the many different terroirs.

"The biggest challenge is the overall price to value ratio," says LoCascio of Winebow. "The best wines come from hilly and mountain vineyards that are difficult to farm." He says the strength of the euro against the US dollar makes the retail price point of Sicilian wines a problem.

BASF's Wolff agrees and says that his clients are price sensitive, especially to the wines from south Italy. "The logistic costs are a challenge to handle, especially for Sicilian wines," he adds. "The biggest problem is the distance to Germany." He says that producers are aware of this problem and are trying to solve it by warehousing their wines in northern Italy.

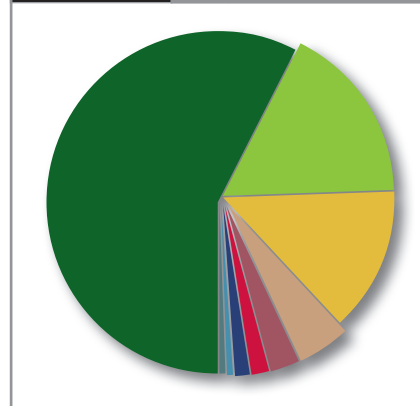
Efforts are being made to improve the region's competitiveness. The research being done by IRVO is aimed at results that will improve the industry. This includes: training at all levels from vineyard workers onwards; laboratory services to the wineries; control and certification of DOC/DOCG wines; collecting, processing and disseminating wine industry data, as well as promotional support and image building activities for Sicilian wines both nationally and internationally.

"Sicilian wines have made incredible progress over the past decade," says Lucio Monte, director of IRVO. "We need to continue with promotion especially in markets such as Germany, the USA and the UK, where our exports are growing. It is important for producers in these markets and other emerging markets to adopt a correct quality price policy and sell their wine in context of territory."

While results are beginning to show in mature markets, promotion in emerging markets still needs to be effectively established. While Sicilian wines can be found in most of the on-trade Italian restaurants in China and other emerging markets, they still have little presence in the off-trade channel compared to wines from other countries. "I believe that the potential of Italian and Sicilian wines can be unrolled through classic tools: healthy distribution on the territory with professional partners, investments in marketing campaigns to build brand and regional and national awareness and, of course, patience to see the market evolving and maturing to a further appreciation of Sicilian wines," says Chiara Molena, the brand manager for Summergate China. ■

Sicily winegrowing at a glance, 2011

Region	Hectares	%
Trapani	65,031.19	57.69%
Agrigento	19,049.72	16.90%
Palermo	15,431.65	13.69%
Caltanissetta	5,447.62	4.83%
Catania	3,181.15	2.82%
Syracuse	1,840.61	1.63%
Ragusa	1,536.81	1.36%
Messina	885.35	0.79%
Enna	329.39	0.29%
Total	112,733.49	100%



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