4/08 MEININGER'S WBI

UNDER THE TUSCAN SKY

Tuscany exploded on the world stage when the Super Tuscans appeared in the late 1980s. Wine lovers couldn't get enough of them and the style's future seemed secure. Yet now, writes Michèle Shah, there is a swing back to traditional winemaking.

No other Italian wine producing region has evolved as dynamically as Tuscany over the past 15 years. Thanks to its three main driving production zones, Brunello di Montalcino, Chianti Classico and Nobile di Montepulciano, Tuscany today enjoys worldwide fame. But what about Tuscany's other areas of production? Some have grown in stature, such as Bolgheri on the Maremma coast, known for its elegant Super Tuscan blends. Similarly the fruitier Morellino di Scansano, once a minor wine produced in the hills behind the coastlands of southern Tuscany, has seen unprecedented levels of interest in recent years as leading producers have recognized its potential and scrambled to buy land.

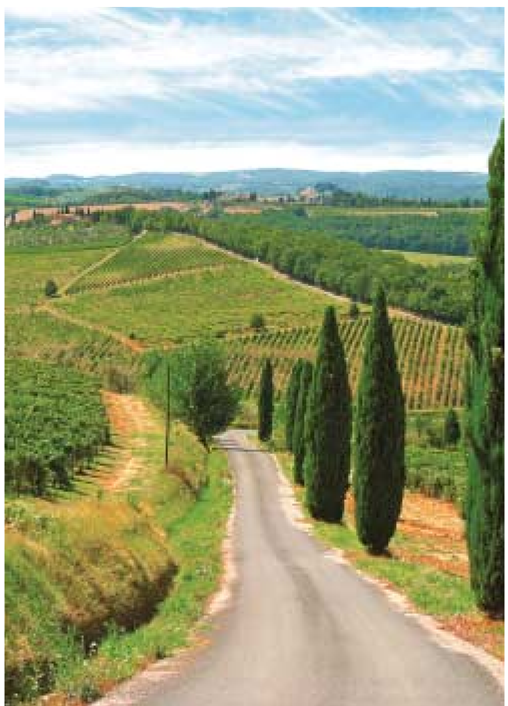
Generic Chianti has always represented the bulk of Tuscany's volume, the main criticism being that the style has little uniformity. Over the past few years the trend in the Chianti subzones has been to create individual identity by producing a wine with a difference, an IGT 'Super Tuscan', often made from international varieties, rather than Sangiovese, and showing a bolder structure, which could sell for a higher price. This was fine as long as the Super Tuscan trend held; however, these wines have no real identity and are often priced out of an increasingly competitive international market.

IGT versus DOC

The controversial wines that became known as Super Tuscans are no longer as popular as they were. When they first appeared, they were of unprecedented quality, proudly being Vino da Tavola and then *Indicazione Geografica Tipica* (IGT), the appellation ranking below the more tightly regulated DOC. Made in a great variety of styles, they encompassed an unlimited range of grape varieties, but blatant flouting of DOC restrictions caused acute embarrassment internally that the system could breed such rebellion. Today, Tuscans are among the most DOC conscious of Italians and their denominations are regularly amended to take improved production criteria into account.

"IGT Toscana was certainly of great importance to Tuscany's image," says Renzo Cotarella, CEO of Antinori, who were a major player in the Super Tuscan revolution. "Wines such as Tignanello, Solaia and Sassicaia have made history and are still a driving force not only of Tuscan, but premium Italian wines." IGT, which gave more freedom to experiment, was important in that it proved that Italy could also make premium, modern wines. Today, Super Tuscans may still gain high scores in wine guides, yet they prove difficult to sell, being overpriced and difficult to market, so that Tuscany is reverting back to its historical and more traditional denominations, upheld by improved quality in production.

According to Enrico Viglierchio, CEO of Banfi, IGT Tuscany along with the DOC and DOCG denominations are important to Tuscany's identity; however, Tuscan wines internationally are recognised primarily by their brand names.



1 Inside Tuscany

Region	Hectares	Producers	Bottles
Chianti and subregions	10,500	2,500	73m
Chianti Classico	7,100	612	38m
Vino Nobile di Montepulciano	1,200	80	8m
Brunello di Montalcino	2,000	250	11m*

* including Rosso di Montalcino

SOURCE: MEININGER'S WINE BUSINESS INTERNATIONAL

Quality rising

A major improvement over the last 20 years has been seen in vineyard management, cellar hygiene and technology. Vineyard management has also had to consider better mechanisation, as skilled labour proves ever more difficult to find, which in turn has introduced new trellising methods. Experimental vineyards and clonal research has been carried out to develop new clones of Sangiovese that respond to an earlier ripening, lower yields and a bolder colour. Over the past 15 years, Tuscany has undergone systematic replanting of vineyards to a higher density. Some producers such as Frescobaldi would like to see more replanting. "We need to move at a faster pace," says Lamberto Frescobaldi. "To keep up with our competitors and to be able

"There are and have been many really bad Chianti and Classicos on the Danish market and therefore consumers normally avoid Chianti. Branding, quality improvement and competitiveness are needed."

Bill Kyhl, CEO of Toscavini in Denmark Although not the first, Bill Kyhl foresaw the potential in Internet wine retail in Denmark. His success permitted him to leave his radio job and devote himself full time to Toscavini.

to deliver the style our consumers want." Raising quality standards involves green harvesting, bunch thinning, hand harvesting and a rigorous selection during harvesting, both in the vineyard and as the grapes are brought to the cellar. All cellars today are temperature controlled and ageing is carried out in a variety of barrels, from the traditional Slovenian large oak barrel to smaller barriques.

Over the past 20 years, most producers have planted a number of international varieties, such as Merlot and Cabernet, which often improve the wine's structure, especially since Sangiovese can be difficult to grow and ripen. But while adding an allowed percentage (15-20%) of international varieties to the Sangiovese base is still popular, producers are beginning to return to more indigenous varieties, realising that a higher percentage of international varieties overpower the character of the Sangiovese grape. Likewise the use of small casks, which can produce over-oaked wines, is not as prominent as it was some years ago.

The future

"Tuscany's viticulture today is not led by brands or international styles, but by investing in its historic appellations such as Brunello and Morellino," says Stefano Cinelli Colombini, CEO of Fattoria dei Barbi. "These appellations represent Tuscany's 'brands' and are created by not one producer, but by many small producers under the umbrella of the Consorzio."

Looking to the future, many believe that Tuscany's small estates will play a fundamental role in delivering 'niche, artisanal wines' which show terroir character. "They need personality, but must also be quick and flexible to pick up market trends as well as being cost effective," warns Francesco Ricasoli, CEO of Castello di Brolio.

Emilio Pedron, president of the Gruppo Italiano Vini (GIV), agrees with the call to a return to Tuscany's historic roots. "Chianti remains one of the pillars of Tuscan and Italian production," he says. " Due to climate change and a need to improve quality, it has been necessary for some of the Tuscan denominations to re-focus on the appellation regulations without losing sight of its roots and identity." ■

Leading Tuscan regions

BRUNELLO DI MONTALCINO

Brunello di Montalcino is a majestic red made from 100% Sangiovese grown in the community of Montalcino south of Siena. While vineyards and production have expanded dramatically over the last 20 years from a handful to over 220 estates, styles have become a little less uniform.

"The price of grapes from1993 to 2007 has risen by 210%," comments Stefano Cinelli Colombini CEO of Fattoria dei Barbi. At the same time our sales have risen by 200% and our turnover by 360%."

The recent problems with planting irregularities in the denomination set off an official inquiry involving reputable names like Antinori, Frescobaldi and Banfi and could be a setback to Brunello's image. "It is time that the Brunello denomination re-thinks its rules and regulations which at present are too restrictive," says Emilio Pedron. "These need to cater for a modern market and allow a more freedom in production by permitting a small percentage of international varieties to be added to the Sangiovese."

VINO NOBILE DI MONTEPULCIANO

The hill town of Montepulciano in southeast Tuscany is the home of Vino Nobile, which bears a family resemblance to both Chianti Classico and Brunello, since its mainstay, Prugnolo Gentile is a variant of Sangiovese.

CHIANTI CLASSICO

Chianti Classico is the historical heartland area between Florence and Siena where Barone Bettino Ricasoli devised the formula for Chianti production in the mid-1800s and where today, the 'golden triangle' of Castellina, Radda, and Gaiole is considered the region's true core.

CHIANTI AND ITS SUBREGIONS

Chianti remains the nucleus of Tuscan viniculture, still the most voluminous of Italy's classified wines. Produced in a vast hilly ring around the heartland denomination of Chianti Classico and covering much of central Tuscany, the zone extends from north of Florence to south of Siena and has a total of seven subzones.

"It is difficult for the consumer to distinguish and differentiate between a Chianti and a Chianti Classico," says Renzo Cotarella, CEO of Antinori. "In addition each subzone of Chianti has its own style and often the price brackets are different, making the issue even more complicated."

LEADING TUSCAN PRODUCERS

1 Gruppo Italiano Vini (GIV)

Villa Belvedere, 37010 Calmasino (Verona), Italy
Phone: +35 045 626 9600, www.giv.it

2007 turnover: €294m
CEO: Emilio Pedron
Bottle production: 85m bottles
Exports: 63m bottles
Key brands: 18, particularly Melini, Machiavelli and Serristori
Main export markets: Germany, US, UK

GIV is a consolidated wine producing company with 14 wineries in seven wine growing regions. It is also Italy's largest exporter and producer of Italian wines. With a well-established company structure GIV is able to plan new investments in emerging areas and established prime vineyards areas.

2 Marchesi Antinori SRL

Piazza Degli Antinori 3, 50123 Firenze, Italy
Phone: +39 055 235 9848, www.antinori.it

2007 turnover: €135.6m
CEO: Renzo Cotarella
Export manager: Stefano Leone
Vineyard area: 1,800 hectares
Bottle production 2007: 20m bottles
Exports: 13.2m bottles
Main export markets: USA, Germany, Canada

Martchesi Antinori is one of Italy's largest family owned companies with 1,838 hectares of vineyard spread mainly over Tuscany, with vineyards in Umbria, Lombardy, Puglia, Hungary and Washington State, Chile and Malta. Antinori is one of the key wine estates which contributed to the innovation of Italian viticulture in the early 1960s.

3 Marchesi de' Frescobaldi

Via S. Spirito 11, 50125 Firenze, Italy
Phone: +39 055 271 41, www.frescobaldi.it

2007 turnover: €67.9m
CEO: Giovanni Geddes da Filicaja
Vineyard area: 1,100 hectares
Bottle production: 9.7m bottles
Exports: 6.7m bottles
Main export markets: US, Canada, Germany, Switzerland, UK

Flagship family run estate for over 700 years producing some of Tuscany's top wines from Chianti Rufina to Brunello di Montalcino. In 1995 Frescobaldi teamed up in a 50/50 joint venture with Robert Mondavi in Montalcino, producing Luce and Lucente. In 2002 they bought a 50% shareholding of Ornellaia, which they now own outright.

4 Ruffino SRL

Piazzale I. L. Ruffino 1, 50065 Pontassieve Firenze, Italy
Phone: +33 055 836 05, www.ruffino.it

2007 turnover: €65m
CEO: Adolfo Folonari & Luigi Folonari
Bottle production: 16.8m bottles
Exports: 14.75m bottles
Main export markets: US, Italy, Canada, Germany, UK, Japan, Scandinavia

Ruffino has been owned by the Folonari family since 1913. The total surface of vineyards of Ruffino's seven Tuscan estates is 600 hectares, located in the best DOCG growing areas of Tuscany. The Borgo Conventi Estate in Friuli produces premium white wines from the area of Collio and Isonzo.

5 Barone Ricasoli

53013 Gaiole in Chianti (Siena), Italy
Phone +35 0577 7301, www.ricasoli.it

2007 turnover: €16.4m
CEO: Francesco Ricasoli
Vineyard area: 246 hectares
Bottle production: 2.6m bottles
Exports: 16.24m bottles
Main export markets: US, Scandinavia

Barone Ricasoli was largely responsible for creating the Chianti Classico demarcation in the 19th century. Since 1993, when Francesco Ricasoli regained control of both the vineyards and the winery, and appointed Carlo Ferrini, one of Tuscany's most sought after wine-making consultants, quality has improved remarkably.

6 Rocca delle Macia SPA

Loc Le Macie 45, 52011 Castellina in Chianti (Siena), Italy
Phone: +39 0577 7321, www.roccadellemacie.com

2007 turnover: €21.5m
CEO: Sergio Zingherelli
Vineyard area: 210 hectares
Bottle production: 4.5m bottles
Exports: 3m bottles
Main export markets: USA, Canada, Germany, UK

Rocca delle Macie was founded by Italian film director Italo Zingarelli who purchased Le Macie in 1973 with 85 hectares of vines. Today Rocca delle Macie encompasses four estates in the Chianti Classico area, with others in Morellino di Scansano in the Maremma area.

7 Banfi

Castello di Poggio alle Mura, 53024 Montalcino (Siena), Italy
Phone: +39 0577 840111, www.castellobanfi.com

2007 turnover: €65.9m
CEO: Enrico Viglierchio
Vineyard area: 850 hectares
Bottle production: 13.5m bottles
Exports: 64% of production
Main export markets: Italy, USA, Germany, UK

Founded in Montalcino in 1978, after being purchased by brothers John and Harry Mariani, owners and negotiants of Banfi Vitners in USA. In 2007 a new winemaking project was launched, which included installing 24 steel and oak 177 hectolitre fermentation vats for the production of Brunello and IGT Super Tuscan wines.

8 Fattoria dei Barbi

Podernovi 170 53025 Montalcino (Siena), Italy
Phone: +39 0577 841111, www.fattoriadeibarbi.it

2007 turnover: €10.2m
CEO: Stefano Cinelli Colombini
Export manager: Raffaella Guidi Federzoni
Vineyard area: 94 hectares
Bottle production: 800,000 bottles
Exports: 350,000 bottles
Main export markets: US, Canada, UK, Asia

Fattoria dei Barbi one of Montalcino's historic Brunello estates belonging to the Cinelli Colombini family was split in two parts between siblings, Stefano Cinelli Colombini and Donatella Cinelli Colombini in 200. Today Fattoria dei Barbi has grown considerably in volume and value under the management of Stefano Cinelli Colombini.

9 Agricol Tori del Chianti Geografico SRL

Via del Mulinaccio 10, 53013 Gaiole in Chjianti (SI), Italy
Phone: +39 0577 749489, www.chiantigeografico.it

2007 turnover: €8.2m
CEO: Carlo Salvadori
Export manager: Angelo Dalbello
Vineyard area: 550 hectares
Bottle production: 2.2m bottles
Exports: 800,000 bottles
Main export markets: Italy, USA, Germany, UK

A cooperative founded in 1961 with 200 members, 80% of whose production is sold though the Horeca channel in Italy. The remaining wine is exported to USA, Asia and Europe.

10 Castelli del Grevepesa

Via della Resistenza 276, 53040 Abbadia di Montepulciano
Phone: +39 057 870 741, www.avignonesi.it

2007 turnover: €17m
President: Francesco Colpizzi
Export manager: Giuseppe Soini
Vineyard area: 1,000 hectares
Bottle production: 6m bottles
Main export markets: Italy, USA, Germany, UK
Main Brands: Chianti Classico Clemente VII - Chianti Classico Castelgreve

A 160 member cooperative founded in 1965, today the largest producer of Chianti Classico DOCG. Their sales are divided into 60% exports and 40% domestic sales. Following a fall in prices between 2003 and 2005, prices for 2006 and 2007 have risen along with an increase in sales.