



Castello del Poggio
in Monferrato Astigiano, Piedmont

A VENERATED REGION

Piedmont, the second-largest region in Italy, is home to some of the world's finest wine production. Michèle Shah looks at how this very complex region functions.

In terms of craftsmanship, tradition, and respect for native vines in their traditional habitat, Piedmont may have no equal outside of the most venerated wine zones of France. There is something reminiscent of Burgundy in the Langhe hills near Alba where Barolo and Barbaresco are grown: manicured vineyards fragmented into single-owner plots on every south-facing slope, forming a geometric contour to the trim hilltop villages.

Piedmont ranks only sixth among Italy's twenty regions in volume of production, but its DOC(G) zones, including the comprehensive Piedmont denomination, are the greatest of any region. There are 16 DOCG wines and 42 DOC wines which form the mainstay of the respected producers; even new wines, whether from indigenous or foreign grape varieties, usually come under DOC jurisdiction - mostly Piedmont DOC, Langhe DOC or Monferrato DOC - because the region has avoided the introduction of IGTs. In 2014, Piedmont produced almost 2.5m hL (or 29m cases) of wine. The majority of production (59%) is red and more than 90% is at DOC/DOCG level.

Grapes and wines

Piedmont produces a wide variety of wines, from sought-after fine red wines to sparkling wines. Most of the region's classified wines derive from native vines, with single varietals

predominating, although not all carry variety names. Nebbiolo, source of Barolo and Barbaresco, along with wines such as Gattinara, Ghemme, Carema, Lessona, Nebbiolo d'Alba and others, is by far the noblest vine. The ever-popular red Barbera, which meets consumer appeal for its fruity character, produces high-quality wines from two main sources: Barbera d'Asti (a DOCG) and the DOC of Barbera d'Alba. It's a vigorous vine, and yields must be strictly controlled in order to produce high-quality wines.

Barolo is often identified with single vineyards and production is centred in the villages of Castiglione Falletto, Monforte d'Alba, and Serralunga d'Alba (where the firmest wines are made), as well as Barolo and La Morra, in addition to Novello, Verduno and Grinzane Cavour. Ageing requires three years (two of which are in wood), with Riserva requiring five years.

Both Barolo and Barbaresco have undergone stylistic changes that have divided progressive winemakers - who have opted for short, hot macerations and brief spells in small new oak - from the traditionalists, who macerate for weeks and then allow the wine to slumber for years in inert Slavonian barrels. The best modern interpretations of Barolo and Barbaresco maintain their ample dimensions, but are better balanced and more approachable than before.

PRODUCTION FIGURES FOR MOST SIGNIFICANT DOCG



SOURCE: CONSORZIO LAND OF PERFECTION

Barbera has plentiful fruit and acidity but lacks supporting tannins, a combination that gives wonderful vibrancy and lift when made from good-quality grapes. Over recent years, producers have sought to give additional balance and complexity through ageing in small, new oak casks. Others use oak less liberally, and more producers today use steel. The red varieties Grignolino, Freisa, Pelaverga and Ruché are so unusual that they remain little more than local curiosities, but deserve greater attention.

The lively, fruity and uncomplicated, but not simplistic, nature of Dolcetto, one of Piedmont's most planted red varieties, is widely misunderstood and unknown outside its native Piedmont. It is everything but 'dolce' (sweet) and its principal problem is that it needs perfect ripening to make it palatable and soften its tannins. Dogliani, its main area of production, is suffering from fragmentation, resulting in little appeal for the export markets.

Among whites, the sweet sparkling wine Asti, made from the Moscato Bianco grape, is increasing its share of exports, although many prefer the gently bubbly Moscato d'Asti. In the last five years, the frizzante Moscato d'Asti, along with Asti Spumante, has seen production soar and exports rise, especially to the US, while the red, strawberry-scented sparkling Brachetto d'Aqui is gaining appeal in Asia.

The native varieties Arneis, from the Roero hills near Alba, and Cortese, at its best in Gavi, as well as lesser-known Nascetta from the commune of Novello, make stylish dry whites. The new trend-setter among whites is the rare Timorasso grape found in the area of the Colli Tortonesi. Almost rendered extinct by phylloxera, it has been revived by a growing number of producers in the Colli Tortonesi DOC. "The soils are rich in limestone and fossils which, together with the saline rains from the closeness of the sea and the thermal underground springs, yield a wine rich in minerality and acidity, making Timorasso a deliciously ageworthy wine," explains Paolo Ghislandi of Cascina Carpini, a winery established in the Colli Tortonesi.

Regional diversity

Viticulture is most intense in the Langhe and Monferrato hills around Alba, Asti, and

Alessandria, where thousands of growers work vineyards that are often little larger than a hectare. Many sell grapes to wineries producing vermouth, Asti, and other sparkling wines, and are centred around Canelli, Alba and Turin, but more and more the urge to make one's own wine is taking over and there has been an explosion of new estates and new labels.

Piedmont's other outstanding wine district is the Alpine foothills between Valle d'Aosta and Lake Maggiore in the provinces of Vercelli and Novara. Cultivation is much more spasmodic here but Nebbiolo still prevails with Gattinara, Ghemme and Lessona the leading wines. Travaglini, the largest family-run winery in Gattinara, with 50 ha (half the total hectares of the appellation) says they are experiencing a revival in appreciation of their wines. "The US market is one of our best markets for this Nebbiolo from the north, known as Gattinara," says Cinzia Travaglini.

Piedmont is a "classic" region of production with iconic names such as Giacomo Conterno, Bruno Giacosa and Angelo Gaja. It has never been one for trends, believing in the strength of its varietals. According to Sergio Molino, winemaker to 30 small-to-medium Piedmont wineries, Piedmont's great strength was in opposing the suggestion made by a few notable producers in the 1990s to blend Barolo with international varietals such as Merlot.

Today, a hectare of vineyard planted to Barolo can command as much as €700,000 (\$790,000) to €1m. "Piedmont's wines are similar to Burgundy wines; many producers and many small vineyards and many crus expressing unique character and biodiversity. Its wines express varietal purity with Barolo in the lead like a pure-blood horse that gallops ahead, commanding its own prices," says Molino.

Some of Italy's largest producers are based in Piedmont. Fratelli Martini, which leads in both volume and value, and which has a turnover of €160m, is a family-owned business based in the Langhe since 1947. With no vineyards of their own they buy in grapes from 600 member growers and produce some 70m bottles, of which 89% are exported. Giordano Vini (part of Italian Wine Brands), a family business with a turnover of €101m, pioneered the concept of selling directly to consumers in 1956. Both wineries are among Italy's top 10 largest producers.

PIEDMONT BY NUMBERS:

16 DOCG and 42 DOC
 14 winegrower associations (Consorzio)
 7 wine roads
 43,893 ha of vineyards (7% of Italy's total)
 2014 Piedmont production was
 2.4m hL (- 6.9% on 2013)
 280 wineries with 3,300 employees
 54 cooperatives
 €369m production value

The consortiums

Like most Italian wine regions, cooperative production also plays an important role in Piedmont, especially because production is so fragmented. There are 38 cooperative wineries, of which the biggest is Araldica Castelvoro (di Castel Boglione), founded in 1954 with a production of 25m bottles and a turnover of €34m. Terre da Vino follows with a €24m turnover; Terre del Barolo with €14m; Vignaioli Piemontesi with €12m; and Tre Secoli (di Mombaruzzo) with €12m.

Most wineries and cooperatives belong to one of the many wine producer associations ("consorzio") that permeate and protect the viticulture of Piedmont. The largest 'umbrella' consortium, Piemonte Land of Perfection, which was established in 2011, groups together Piedmont's principal consortiums, and represents 1,734 companies and 33,420 ha of DOC and DOCG vineyards. The size of the companies represented range from family-run wine estates to cooperative wineries to large bottling and processing companies. The essential purpose of this consortium is to promote the wines and territory, as well as develop export opportunities for small-and-medium-sized companies.

The members of Piemonte Land of Perfection include six independent consortiums: Consortium for the protection of Asti; Consortium for the protection of Barolo, Barbaresco, Alba, Langhe, and Roero; Consortium for the protection of Brachetto d'Acqui; Consortium for the protection of Asti and Monferrato Wines; Consortium for the protection of Gavi; and the Piedmontese Vignerons Association. Their philosophy is to join forces and present themselves at main international events under one umbrella. The main activity of the individual



Giuseppino Anfossi of Ghiomo Winery, Langhe

state consortiums is to defend production, investigate fraud and control the authenticity and quality of production, ensuring approved legislation is applied. Such procedures, however, involve endless red tape.

Many small producers complain about the level of bureaucracy generated by the state. "It's like a police state," says Molino. "There are seven state organisms that control production and generate endless paperwork, applied both to small and large producers." This is a complaint frequently echoed among smaller producers, who lack the administrative staff of the larger ones. "Among the difficulties that small producers face is that of tending to the vineyards and making the wines, which is, of course, a passion, but involves a lot of work. In addition to this we need to promote our wines and pay attention to the increasing bureaucracy," says Giuseppino Anfossi, of Ghiomo winery, a small, 40,000-bottle producer in the Langhe area of Guarene. "We haven't the resources that larger wineries have. I work single-handed and have to follow each step of production, as well, as marketing, sales, promotion and the permits and paperwork," explains Anfossi. On the one hand, the consortiums are accused

of generating more and more bureaucracy, while on the other, Andrea Ferrero, director of the Consortium for the protection of Barolo, Barbaresco, Alba, Langhe, and Roero explains that their office offers free advice on technical issues and legislation.

The Consortium for the protection of Barolo, Barbaresco, Alba, Langhe, and Roero is also the promoter of the Grandi Langhe DOCG, a biannual event bringing importers and other members of the trade to Piedmont to participate in a three-day comprehensive tasting of the Langhe DOCG area. "This is a relatively new promotional activity," explains Ferrero. "We are very pleased with the results and the way it promotes the wines and our territory." The philosophy is not to sponsor the travel or hospitality of the 350 invitees who travel from 22 different countries to come to taste the wines; the €300,000 funding is spent on promoting the event. In spite of these and other promotional events, such as Nebbiolo Prima – an annual, five-day event showcasing the new vintage release of the DOCG appellation areas of Roero, Barbaresco and Barolo – promotional activities are said to be still too fragmented. Over the coming three to five year period, Piedmont will focus on the markets of Russia, Brazil, Hong Kong, with special focus on China and the US.

In addition to the state-controlled consortiums, there is a private consortium, I Vini del Piemonte, established in 2010. It has 180 members and is rapidly expanding. Run as a business, its main aim is to invest in promotional activities in Italy and overseas, creating commercial opportunities for their member producers from across Piedmont. According to their president, Andrea Faccio,

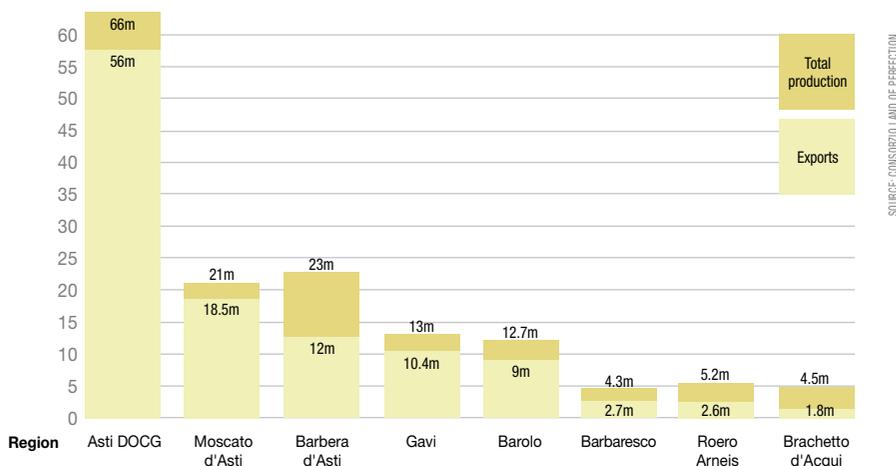
owner of Villa Giada estate, the main advantage over a state consortium is the ability to act swiftly and decisively by voting through a board of producer directors.

The fragmentation of vineyard surface in Piedmont makes investment in mid-to-long-term improvements in production and vineyard management impossibly expensive, while the average small size of wineries means that the cost of employment and the cost of promotion in new markets is very difficult to manage for a large number of producers. "This is why it is often difficult to offer simple wines at competitive prices," explains Raffaella Bologna of Braida winery, which has a 600,000-bottle production focused on Barbera in the area of Rocchetta Tanaro in Asti. In addition to this, according to Bologna, the various vineyard diseases such as downy mildew, esca and flavescenza that have developed over recent years, in particular in the production of Barbera, have been an economic disaster.

The Moscato area of production, however, is enjoying a successful run. Its aromatic freshness and low alcohol content makes the wine appealing to new markets and consumers. "Over the past five years, growth in production has been explosive, a Moscato mania," says Giorgio Bosticco, director of the Asti DOCG consortium. He says that the production of Moscato d'Asti leapt from 13m bottles in 2009 to 27m in 2014, of which 65% is exported to the US and typically sold at between \$9.00 and \$14.00 a bottle. Bosticco adds that the market for Asti Spumante is different, with 80% of sales of the 70m-bottle production sold to Europe. "Our risk is that exports to US are high and we need to diversify to other markets such as China and Asia in general," says Bosticco.

Making Piedmont a UNESCO World Heritage site in 2014 has, according to Angelo Gaja, made producers aware of the great wealth they have inherited. "The nearness to this year's EXPO in Milan will also bring added attention to Piedmont and its wines," says Gaja. "We have consolidated markets in Canada, Japan, Russia and USA, yet still have a lot to offer even to established markets such as the UK, Denmark, Belgium and Switzerland, just to mention a few that are still very much open to the appeal of our Piedmont wines. While for future markets, I still think we have openings in Europe as well as Africa and, of course, in Asia."

Bottled exports - 70% of exports are to Europe



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