The Italian market appears barred, unfaithful, erratic, even though it does not express maturity in its economic data. The gap between producer and consumer is excessive: the complexity and variance of demand calls for greater elasticity, both economic and mental. In comparison with 2012, Italy's overall consumption data records – 1.9%, while value at consumption marks + 0.5%. A drop in volumes smaller in 2013 than the gap registered between 2011 and 2012, which had read a – 2.1%, though we cannot speak of a reversal of trend. As compared with 2010, 2 consumers out of 5 have changed brand and label. According to 2013 OVSE surveys, the drop is due to natural sparing in expenditures, renunciation of non primary goods, social conditions of instability, fear to spend and the lack of a direct positioning of labels on the different markets and channels.

< *The domestic market requires new marketing planning and a long-term strategy: more trade promotion and the direct contact with final consumers to foster growth in consumption. Information and training support belong to the sales mix: such actions must be more localized, personal and private, with an invitation to first hand experiences, in this phase of contraction and discontinuity*.> says Giampietro Comolli.

Three difficult years for the home market: national consumption backslides of 8.5 million bottles (a total -6.2%), including 3.7 million imported bottles (Champagne and Cava), home bubbling wines contributing (in price, quality and image) to replace imported wines.

Home consumption in Italy is quite diversified, depending on Regions: all in all, more bubbling wines are drunk in the north than in the centre or in the south; the north-east concentrates on Doc Prosecco and Docg Superior, that have a solid footing also in pick restaurants, though in proportion to the absolute number of inhabitants the largest volumes in Doc Prosecco are recorded in the north-west. Also the process of de-seasonalizing consumption, which had started in around 2000 (in 1999, 68% of overall consumption still took place in the festivities of the close of the year), has unfortunately jammed, backsliding to a party-festivity-matching of bubble wines consumption: from the peak of 2010, when only 46% of bottles were uncorked during festivities, to 2013, when the same data read an increase to 51% of consumption, with differences that may be significant: Prosecco stuck to 34-39%, while Asti ranged between 59 and 64%.

TWO ITALIAN WINES AMONG THE REST IN THE YEAR 2013 .

**TrentoDOC:** on the national market, all channels considered, 7,900,000 bottles were uncorked in the year; a total 750,000 bottles were allocated to export, 380,000 of which went to Asia, 250,000 to the Americas and 120,000 to Europe. 92% of consumption took place on the national market. An overall 350,000 bottles of rosè were drunk (whether in Italy or abroad); during the year, 550,000 bottles were set to special reserve. 67.5% of the total regarded sales in gdo-gda; about 1.5% was sold in the cellar. 31% went to the whole horeca sector.

**Franciacorta:** on the national market, 11,700,000 bottles were uncorked in the year. As to sales abroad, 300,000 bottles were sent to Asia, 450,000 to the Americas, 520,000 to Europe. Home consumption amounted to 91% of the total; about 320,000 bottles sold were rosè; nearly 800,000 were destined to special reserves; 58% of consumption belonged to GDA; 3.2% was sold in the cellar; 38.8% was uncorked in horeca channels.

WINESHOPS

Wineshops confirm the absolute downward trend in sales of bottles and closed packages. The drop in sales of open packages has stopped, as their sales were steady, especially during the close of the year, when, even though on a smaller scale compared with the boom of four years ago, the choice of a bubbling wine bottle, especially of an Italian one, became once again fit for a present

In wineshops the purchase of bottles has drifted towards extended festivities, purchases being less spread over the whole year, and there has been a reduction of imported bottles, except for top leader brands, both national and foreign. The top list of sales is, in order of placement, Franciacorta, Champagne, Valdobbiadene, Trento and others. On the contrary, the sales from wineshops to restaurants have grown steadyly in the past two years, with restaurants being the most standard and constant buyers over the year. Today significant capitals in national and foreign wines lie idle in wineshops.

From 2011 to 2013, over three years, the drop in sales of bottles and packages averaged 12%, with peaks of even 17-19% as far as foreign labels are concerned. The mean figure is nevertheless wrong, as it does not take into account the huge variability of references between, say, a wineshop in Como and one in Lecce in terms of typology, brands and labels. If in Lombardy, in a wineshop, 2 bottles out of 5 represent Franciacorta, in Apulia only 1 out of 9. This proves the operating margin of growth that would exist in case consumers started buying in wineshops again. Wineshops, like delicatessen, are also the sales points that were affected most by the sudden rise of sales at cellars, mainly in territories of specialized, renowned production, like Franciacorta and Valdobbiadene, less in Trento, nearly negligible for Altalanga and Cruasè.

The largest drops can be found in mid-price labels. The best known, high value brands are steady. The effective number of purchases, like the sum spent per receipt, also report a drop, but the largest decrease is in the total number of bottles with reference to the single purchase. An example can be drawn from the days of festivity: from 3.6 average bottles of bubbling wines per purchase, the figure has dropped to 2.1 in three years. Steady the number of purchases for Valdobbiadene and Franciacorta, rising those of Asolo docg, decreasing those of Trento, but the turnover is rising only for Veneto’s Italian method.

RESTAURANTS.

The drop goes on, slow yet relentless, for Italian bubbling wines, especially for the traditional method. Champagne, some specific brands, are standing their ground, both among small concern brands and among great names from Reims. Franciacorta stand out, thanks to 6-7 leading brands; Trento hold out, thanks to their traditional historic brand. Pick restaurants keep faithful to some special, unique products, such as Lambrusco and Gavi, Altalanga and Erbaluce, Verdicchio, Oltrepo… in search of an exclusivity more and more marked; top restaurants, besides, are opening some (unavoidable) room for several docg Valdobbiadene labels, rather left out up to one year ago. Today the catering sector needs "external" advisors to choose the best labels.

Over the past 3 years, the drop in consumption of bubbling wines and spumante bottles has concerned all sorts of typologies: it is in catering that the loss of "de-seasonalizing" has become more and more evident. Often, restoration consigns the "glass" of bubble wine to welcoming, thus playing it down. Besides, consumption has become increasingly personal, so that less and less often you hear at restaurants parrot-like quotes from such and such guide.

If we go into details and observe the spumante/regionality relationship, a restaurant's wine list can greatly help local products, if they are already known and can boast some quotation in a guide or some prizes. At restaurants, of all sales points, the suggestion of a sommelier or of the restaurateur still carries its weight, especially if it seems well constructed and bound to some matching philosophy. Steady to braking the consumption of rosè bubbling wines: for this typology the restaurant's "credit" is conclusive in 1 case out of 2, therefore highly significant.

ITALIAN BARS IN GENERAL.

The consumption of classic method bubbling wines is growing at day/night bars, though the cost per glass has decreased. The concourse and recurrence of consumption are decreasing. Ovse has recorded that, especially at day bars, the number of aperitifs or happy hours has dropped, in 3 years, of 10%; over 15% is the drop at night bars, while day bars keep the sales of "bubbles" steady thanks to "spritz" drinks. The decrease coincides with a reduction in the amount of consumption: the component control-road-security has weighed upon a reduction in consumption more for bars than for restaurants or hotels. In the same three years (but 2013 data compared to 2012 confirm it) a spacing out of chances of consumption has been recorded, at bars as well as at restaurants. Approximately, but on a concrete basis, we can say in 2009-2010 a customer fond of bubbling or spumante wines reached a day/night bar 3.3 times a week and consumption concerned an average 5.8.glasses; in 2012-2013 the same data drop to 1.9 occasions and 2.9 glasses a week. In any case, consumption at day bars has also moved from Champagne to Franciacorta, Valdobbiadene and Prosecco: generally speaking, they won hands down also the comparison with “regional” bubbling wines, with a tennis score 6-2 in some localities where local production can boast a glamorous leader, of renown, often opening its cellar to the public.