Abstract

Introduction

In 2012 the European Commission approved the Regulation (EU) No 203/2012 which allows to use the term “organic wine” for those products respecting specific requirements and presenting the organic certification. Before its approval it was only possible to refer to “wine made from organic grapes”.

Therefore, by organic wine the Regulation means a product obtained by organic raw materials that i) uses products and (if available) substances authorised in the Annex VIIIa of the Regulation 203, obtained as well by organic raw materials and ii) subject to practices and oenological treatments provided for Reg. 203.

It is important to point out that even before this Regulation, in wine sector many stakeholders showed a growing interest for organic production. In Italy, and generally worldwide, in the last decades a movement of producers grew, who started referring to their products as “natural”, and to rely on official certification model and on Origin based labels (PDO and PGI).

This paper presents the results of a survey aiming at illustrating the state of the art of the growing organic wine sector in Italy, taking into account also biodynamic and similar productions. In particular it focuses on marketing practices adopted by wineries.

At present time there are few researches focusing on these issues, and many of them concentrate on general concerns on wine growing topic or on small local realities. On the other hand, this paper tries to depict the national framework of organic wine growing production.

Authors tried to interpret results on the basis of Reg. 203/2012 in order to point out positive/negative impacts on Italian organic wine firms.

Methods

An explorative web survey was conducted in order to collect a complete and varied set of information aimed at getting a clear picture of the organic and natural wine sector. A questionnaire composed by four parts (firm’s structure, marketing and communication strategies, interviewers’ perceptions and the entrepreneur’s personal data) was administered to a sample of firms.

The survey started in 2011 and continued until March 2012.

The sample included both certified organic wine firms and producers of “natural” wine without certification, all around Italy. The first group of firms includes certified firms extracted from Biobank and Sinab database and the biodynamic units from Demeter database; the arrangement of the second group was more difficult because a specific list of Italian “natural” wine producers was not available. So the Authors collected all the firms belonging to specific associations and to organic-biodynamic-natural producers consortia; the list was completed with the units found in specialised websites and finally have been considered the firms which participated during the last two years at least to one specialised trade fair or exhibition.

After a further selection, the final sample frame included 891 units, located in different Italian regions. The return rate has been about 21% (186 filled questionnaires).

1 BioBank is one of the most important Italian website about the organic sector. Sinab is the Italian Information System on Organic Farming.
2 VinNatur, ViniVeri, Renaissance Italia and Triple A.
4 Mainly VinNatur and VinoVinoVino in Italy, Biofach in Nuremberg (Germany) and Millésime Bio in Montpellier (France).
5 The selection process excluded: organic/biodynamic firms not involved in wine production; conventional firms with no organic productions; wine cooperatives; entrepreneurs involved only in bottling phase; wrong data.
According to the Authors’ objectives the collected data were processed through univariate, bivariate and cluster analysis.

Some results
The surveyed industry is very varied: it entails several small family-run firms with just one worker together with a few big units with a more structured governance; certified producers and others against the common standards considered too “light” and useful only as advertising; some firms are involved quite exclusively in direct selling but others prefer to export the main share of the production. However, most of the units carry out all the production process, from grape cultivation to wine processing.
Most of the investigated firms were born after 1991, when the EC reg. 2092 (on the organic production of agricultural products) was implemented.
The average vineyard surface per firm, excluding conventionally cultivated areas, is not very large and it is even smaller for the biodynamic units (11 hectares) compared to the organic ones (14 ha). Though, this last group presents a number of workers lower than average (not including seasonal workers).
The interviewed organic and natural wine producers show low interest in communication strategies and advertising. They are rarely using internet, and they prefer direct contacts with the consumers through wine tasting on farm. Therefore, there is a lack of investment in this area.
The participation to Italian/foreign wine fairs and/or organic sector exhibitions (in the last 3 years) is also quite widespread.

Conclusions
The main problematic points we noticed in organic and biodynamic systems are:
- higher costs for producing and certificating organic wine;
- lower productiveness compared to conventional production;
- low interest by distribution channels for this product;
- low level of consumers’ awareness about organic wine.
Large retailers as well as the wine shops do not promote properly organic wine because it is considered a niche product. In addition, the absence of specific and targeted communication strategies (too expensive according to small organic wine companies) leads to a weak promotion of the product and to a lack of knowledge of it by potential consumers.
The new EU Regulation represents doubtless an important guarantee for consumers by ensuring reliability of organic wine and by allowing consumer to be informed on the quality of the product as provided for the Italian Code of Consumption.
According to the results, organic and biodynamic producers already comply with EU Reg. 203, in other words their products can be certified as organic. On the other hand, we discovered a different situation for those producers who like to refer to themselves as “natural” and who consider organic production rules and procedures not strict enough.
It is interesting to notice that there is a dynamic attitude towards organic production: 17% of surveyed firms, indeed, are converting to organic production.
Finally, an important topic is the labelling system. A trustworthy label, indeed, is perceived by several stakeholders as a necessary tool: it shows and communicates at the same time the coherence with values linked to environmental sustainability; it is less expensive if compared to commercial advertising and it can represent a market alternative against the “standardized taste”.