2014 Brief Report
On the Conegliano Valdobbiadene D.O.C.G. District

C. I. R. V. E.: Inter-Departmental Centre for Research in Viticulture and Oenology

August 2014

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Inter-departmental Centre for Research in Viticulture and Oenology – Conegliano

Consortium for the Protection of Conegliano Valdobbiadene D.O.C.G.

Conegliano Valdobbiadene D.O.C.G. in 2013

The Producers' Consortium

Creation of the D.O.C.	1969
D.O.C.G. status acquired	2009
Communes	15
Area (ha)	6,578

Businesses

Vine-growers	3,238
Wine-producing companies	433
Sparkling wine producers	170

Production & value

Declared grape production (t)	84,128
Certified wine production (hl)	588,889
Conegliano Valdobbiadene D.O.C.G. (bt.)	72,420,570
- Spumante [Sparkling] (90.3%)	65,266,375
- Rive (1.8%)	1,278,469
- Superiore di Cartizze (1.4%)	1,015,593
- Frizzante [Semi-sparkling] (6.5%)	4,722,267
- Tranquillo [Still] (0.2%)	137,866
Retail value of production (million €)	470

D.O.C.G. Sparkling Wine

(in volume)

Italy (57.1%)	38,020,046
Export – *80 Countries* (42.9%)	28,524,798
Principal export markets:	
- Switzerland (22.7%)	6,478,939
- Germany (22.3%)	6,360,005
- United Kingdom (17.2%)	4,915,541
- United States (9.5%)	2,701,071
- Austria (4.7%)	1,353,029

(Sources: Conegliano Valdobbiadene D.O.C.G., 2014, C.I.R.V.E., 2014)

The market for our D.O.C.G. sparkling wine in 2013

*** Please note that the wording of the graphs published below is in Italian. The terms used are the following:**

Volume (bottiglie)	**=**	**Volume in bottles**
Milioni	**=**	**Millions**
Anno	**=**	**Year**
Bottiglie	**=**	**Bottles**
Quota di mercato (%)	**=**	**Percentage of Market Share**
Var. (%)	**=**	**Percentage Variation**

THE TOTAL FIGURES

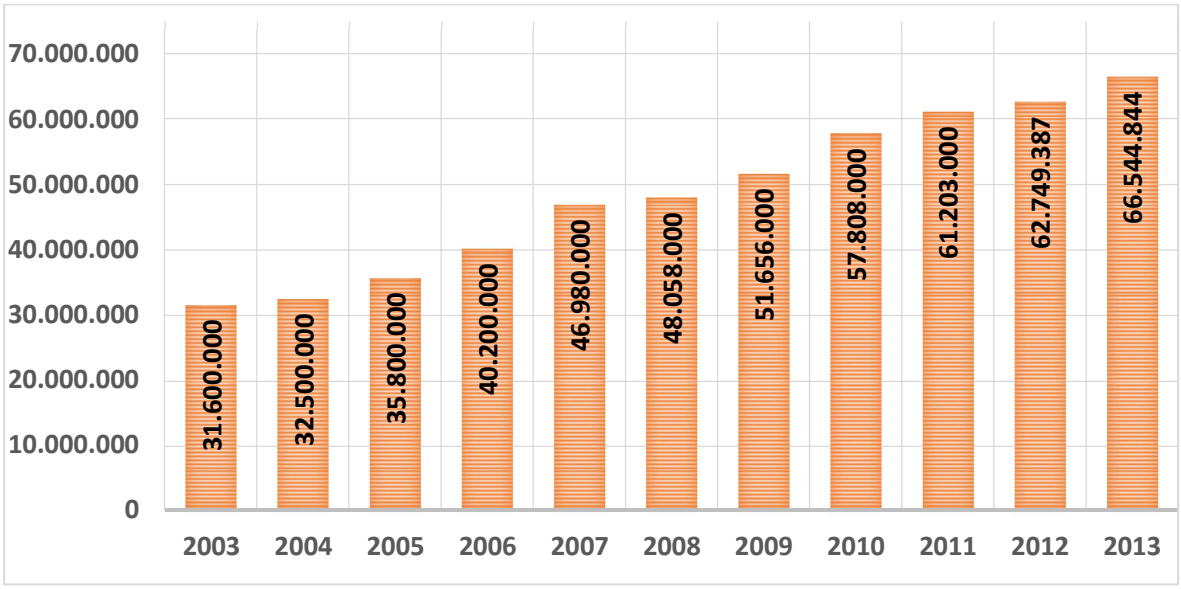
2013	Ex-cellars value	% Var. 2012-13
	327.2 Million €	+6.6 %
2013	**Volume**	**% Var. 2012-13**
	66.5 Million bott.	+6.0 %
2013	**Average price**	**% Var. 2012-13**
	4.92 € /bott.	+0.5 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

With an ex-cellars value of 327.2 million Euros, the market for our D.O.C.G. sparkling wine consolidated even further the positioning it has achieved over the course of the last decade.

In particular, the year-on-year increase in value of 6.6% compared to 2012 was accompanied by a further increase in volume (+6.0%).



Source: C.i.r.v.e., 2014, based on data from the Consorzio del Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

During the period 2003-13, the market for our D.O.C.G. sparkling wine registered an increase in sales of 110.6%, reaching a volume of 66.5 million bottles.

THE ITALIAN MARKET

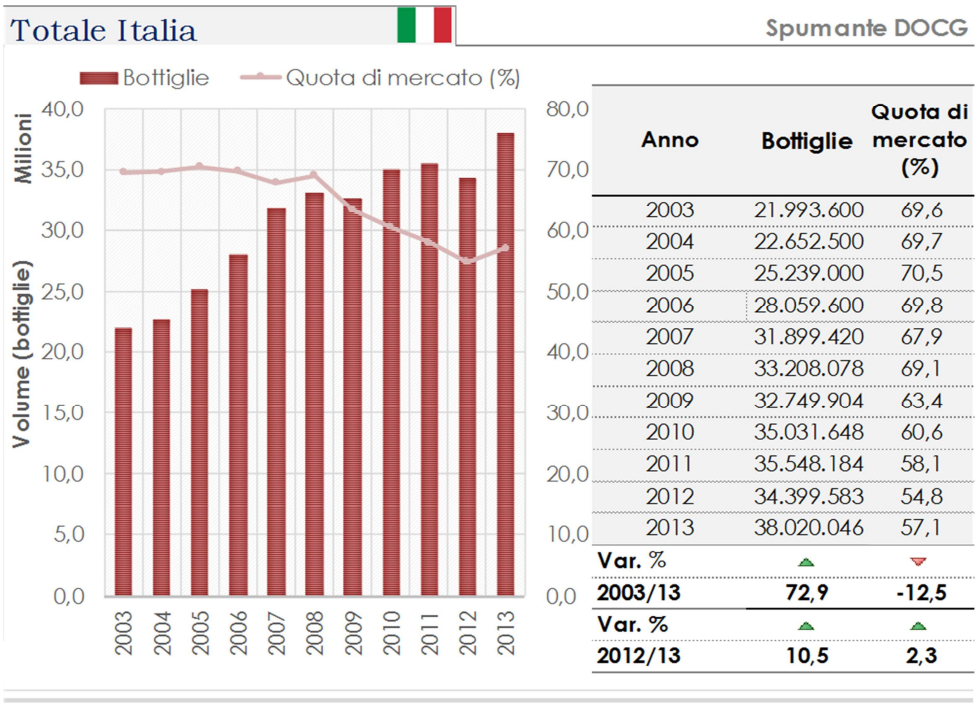
2013	Ex-cellars value	% Var. 2012-13
	194.9 Million €	+11.4 %
2013	Volume	% Var. 2012-13
	38.0 Million bott.	+10.5 %
2013	Average price	% Var. 2012-13
	4.64 € /bott.	+0.8 %
2013	Market share in value terms	% Var. 2012-13
	59.6 %	2.6 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

The Italian market was the main sales area for our D.O.C.G. sparkling wine - with a value of 194.9 million Euros - revealing significant growth (up 11.4% compared to 2012).

This was accompanied by an increase in volume terms on a year-on-year basis of 10.5%.



Anno	Bottiglie	Quota di mercato (%)
2003	21.993.600	69,6
2004	22.652.500	69,7
2005	25.239.000	70,5
2006	28.059.600	69,8
2007	31.899.420	67,9
2008	33.208.078	69,1
2009	32.749.904	63,4
2010	35.031.648	60,6
2011	35.548.184	58,1
2012	34.399.583	54,8
2013	38.020.046	57,1
Var. %	▲	▼
2003/13	72,9	-12,5
Var. %	▲	▲
2012/13	10,5	2,3

Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

Short-term (2012-13) and long-term (2003-2013) market trends in volume terms

During 2013, the Italian market registered a significant increase in sales of 10.5% on a year-on-year basis.

In the course of the period between 2003 and 2013, this trend was echoed by a major increase in volume of 72.9%.

THE INTERNATIONAL MARKET

2013	Ex-cellars value	% Var. 2012-13
	132.2 Million €	+0.2 %
2013	**Volume**	**% Var. 2012-13**
	28.5 Million bott.	+0.6 %
2013	**Average price**	**% Var. 2012-13**
	4.64 € /bott.	-0.5 %
2013	**Market share in value terms**	**% Var. 2012-13**
	40.4 %	-2.6 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

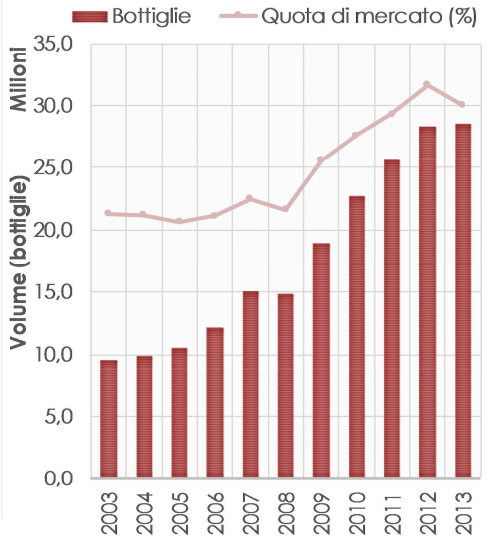
The short-term market trend (2012-2013)

In 2013, worldwide exports of our D.O.C.G. sparkling wine attained a value of 132.2

million Euros, up 0.2% on a year-on-year basis. The market share in value terms of these exports was down 2.6% compared to the previous year, accompanied as it was also by a slight decrease in prices (-0.5%).

In terms of volume, exports of our D.O.C.G. sparkling wine were up 0.6% over the previous year, reaching a new high in 2013 of 28.5 million bottles.

Totale export — Spumante Docg



Anno	Bottiglie	Quota di mercato (%)
2003	9.606.400	30,4
2004	9.847.500	30,3
2005	10.561.000	29,5
2006	12.140.400	30,2
2007	15.080.580	32,1
2008	14.849.922	30,9
2009	18.906.096	36,6
2010	22.776.352	39,4
2011	25.654.816	41,9
2012	28.349.804	45,2
2013	28.524.798	42,9
Var. %	▲	▲
2003/13	196,9	12,5
Var. %	▲	▼
2012/13	0,6	-2,3

Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

In the decade between 2003 and 2013, our D.O.C.G. sparkling wine registered an increase of 196.9%, corresponding to an average annual rate of growth of 19.7%.

Europe

2013	Ex-cellars value	% Var. 2012-13
	104.9 Million €	+1.6 %
2013	Volume	% Var. 2012-13
	23.0 Million bott.	+1.6 %
2013	Average price	% Var. 2012-13
	4.55 € /bott.	0.0 %
2013	Market share in value terms	% Var. 2012-13
	79.3 %	+1.1 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

Europe confirms its position as the second most important market area for our D.O.C.G. Spumante, with a value of 104.9 million Euros, representing 79.3% of

exports in value terms.
Sales on the European market were in the order of 23 million bottles, corresponding to an increase of 1.6% year-on-year.

Non-European countries

2013	Ex-cellars value	% Var. 2012-13
	27.3 Million €	-5.1 %
2013	Volume	% Var. 2012-13
	5.5 Million bott.	-3.4 %
2013	Average price	% Var. 2012-13
	4.98 € /bott.	-1.8 %
2013	Market share in value terms	% Var. 2012-13
	79.3 %	+1.1 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

Sales destined for non-European countries registered a value of 27.3 million Euros, displaying a contraction of 5.1% compared to 2012.

This variation in trend was accompanied on the one hand by a drop in volume (down 3.4% year-on-year) and, on the other, by a slight reduction in average price levels (down 1.8%).

Germany

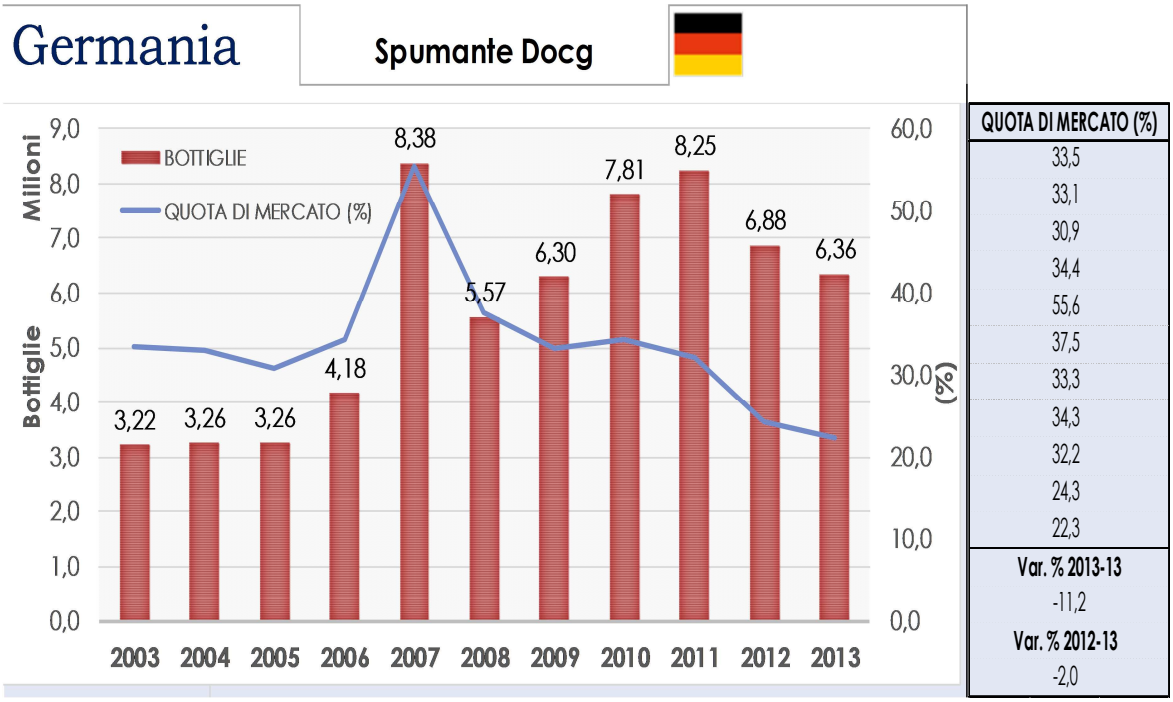
2013	Ex-cellars value	% Var. 2012-13
	29.6 Million €	-5.9 %
2013	Volume	% Var. 2012-13
	6.4 Million bott.	-7.6 %
2013	Average price	% Var. 2012-13
	4.65 € /bott.	+1.8 %
2013	Market share in value terms	% Var. 2012-13
	22.4 %	-1.4 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

In 2013, Germany confirmed its place as the primary importing country for our D.O.C.G. sparkling wine in terms of value with purchases for 29.6 million Euros, but this represents a shortfall of 5.9% compared to the previous year.
With a volume of 6.4 million bottles, the German market showed a decrease in sales

of 7.6% compared to 2012.
On the other hand, there was an increase in the level of prices, up 1.8% year-on-year.



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

With its 6.4 million bottles, Germany became the second most important importing market in 2013 for our D.O.C.G. Spumante in volume terms, 97.6% up on 2003.

Switzerland

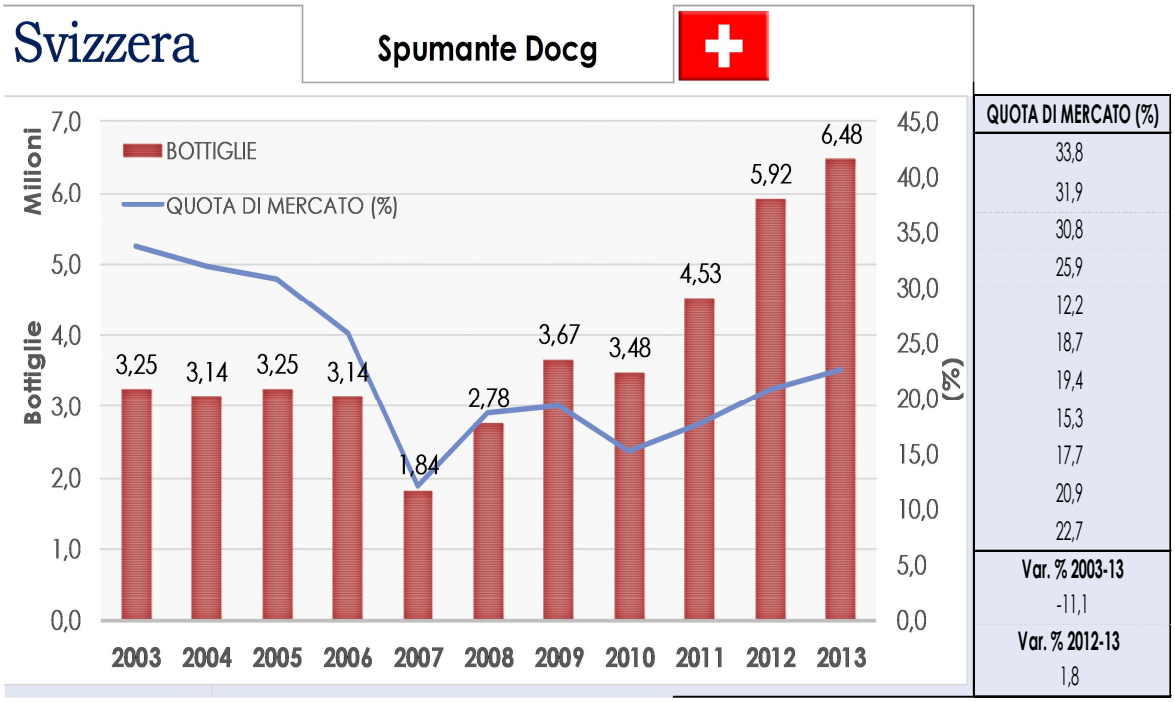
2013	Ex-cellars value	% Var. 2012-13
	28.8 Million €	+1.6 %
2013	Volume	% Var. 2012-13
	6.5 Million bott.	+9.4 %
2013	Average price	% Var. 2012-13
	4.44 € /bott.	-7.7 %
2013	Market share in value terms	% Var. 2012-13
	21.8 %	+0.2 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

In 2013, Switzerland consolidated yet further its position as the second export destination for our D.O.C.G., attaining a market share of 28.8 million Euros, corresponding to 21.8% of total exports.

During the course of 2013 there was a further major increase in sales towards this country (up 9.4% year-on-year), making it the leading import market in volume terms with its 6.5 million bottles. The average price registered on the Swiss market was 4.44 Euros a bottle, a value rather lower than in 2012 (-7.7%).



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

In 2013, Switzerland significantly consolidated its growth in terms of volume, taking the increase in the sales absorbed by this country to 99.5% compared to 2003.

The United Kingdom

2013	Ex-cellars value	% Var. 2012-13
	22.4 Million €	+11.3 %
2013	Volume	% Var. 2012-13
	4.9 Million bott.	+3.3 %
2013	Average price	% Var. 2012-13
	4.56 € /bott.	+7.8 %
2013	Market share in value terms	% Var. 2012-13
	17.0 %	+1.7 %

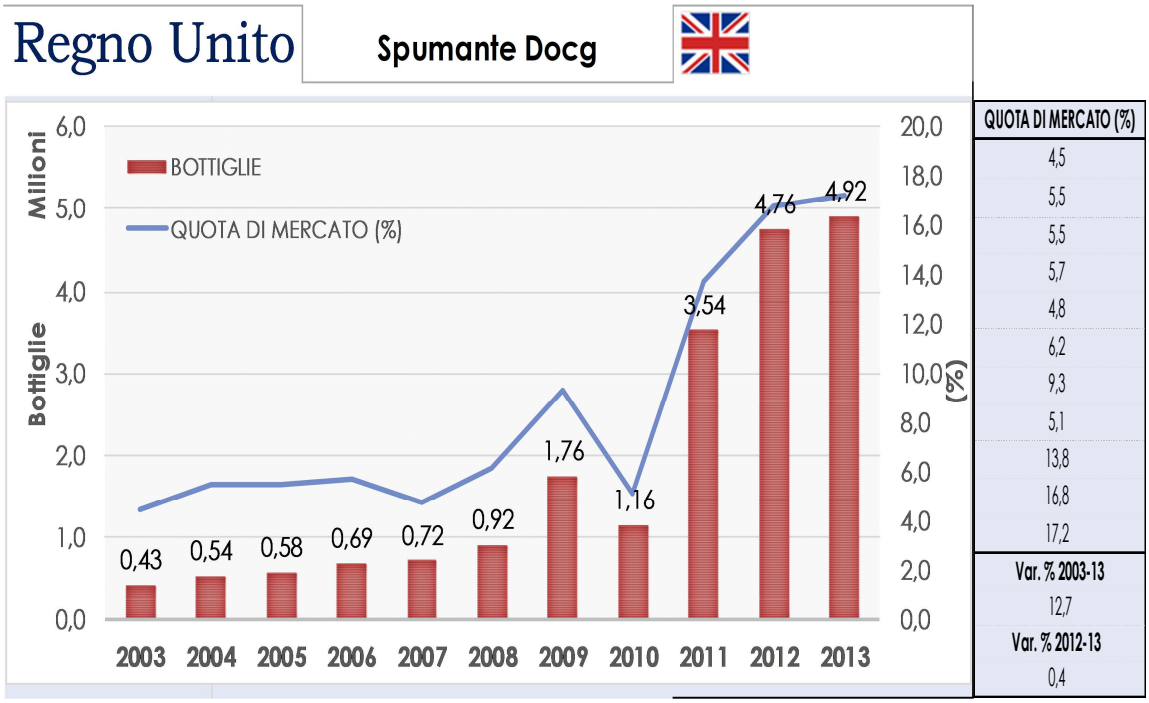
* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

The market in the United Kingdom revealed a significant increase in the value of its imports, up 11.3% on the previous year.

In terms of volume, the sales absorbed by the U.K. market reached 4.9 million

bottles (up 3.3% compared to 2012).
In 2013, the average bottle price registered in this market was equivalent to 4.56 euro a bottle, marking yet another significant increase year-on-year (+7.8%).



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

The United Kingdom confirms itself as the third most important export market for our D.O.C.G. sparkling wine with 5 million bottles, corresponding to an increase of over 10 times the volume sold in 2003.

The United States

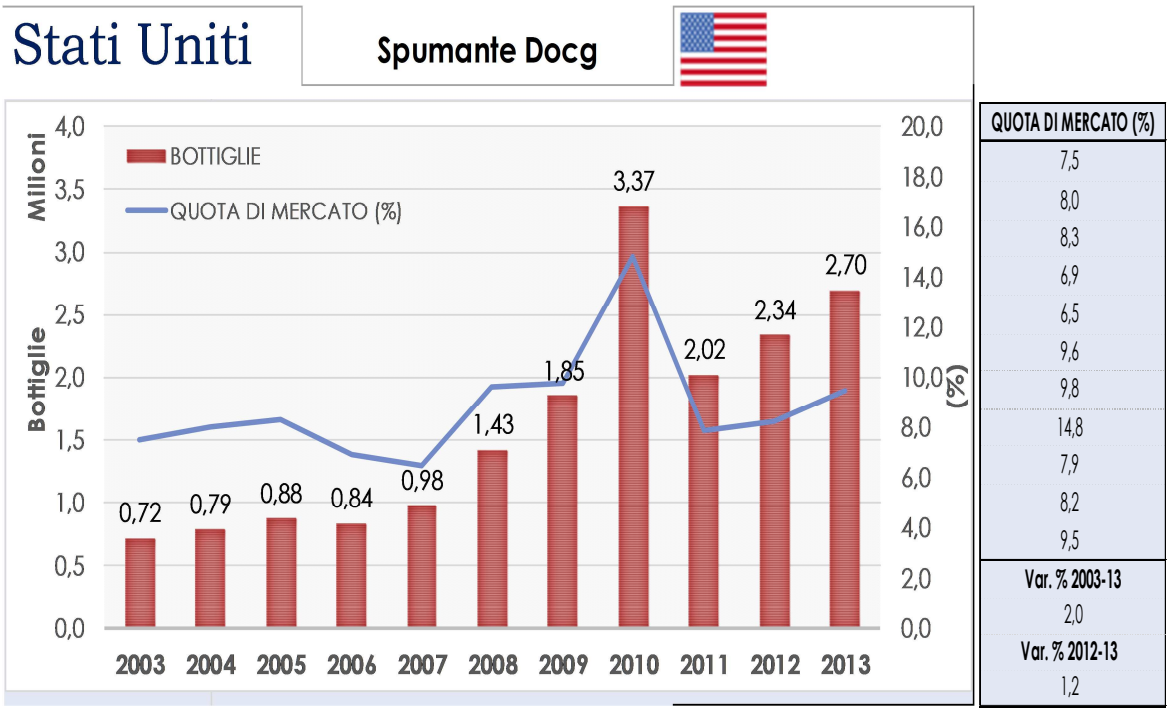
2013	Ex-cellars value	% Var. 2012-13
	12.6 Million €	+11.9 %
2013	Volume	% Var. 2012-13
	2.7 Million bott.	+15.5 %
2013	Average price	% Var. 2012-13
	4.66 € /bott.	-3.1 %
2013	Market share in value terms	% Var. 2012-13
	9.5 %	+1.0 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

In 2013, the United States consolidated its position yet further as the fourth

importer worldwide of our D.O.C.G. sparkling wine in value terms (9.5% of the total) and also registered major growth (up 11.9% compared to 2012).
This performance was obtained thanks to a notable increase in the volume sold to this country (up 15.5% year-on-year).



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

Overall, the U.S.A. market absorbed 2.7 million bottles of our D.O.C.G. sparkling wine in 2013, corresponding to an increase of 274.9% since 2003.

Canada

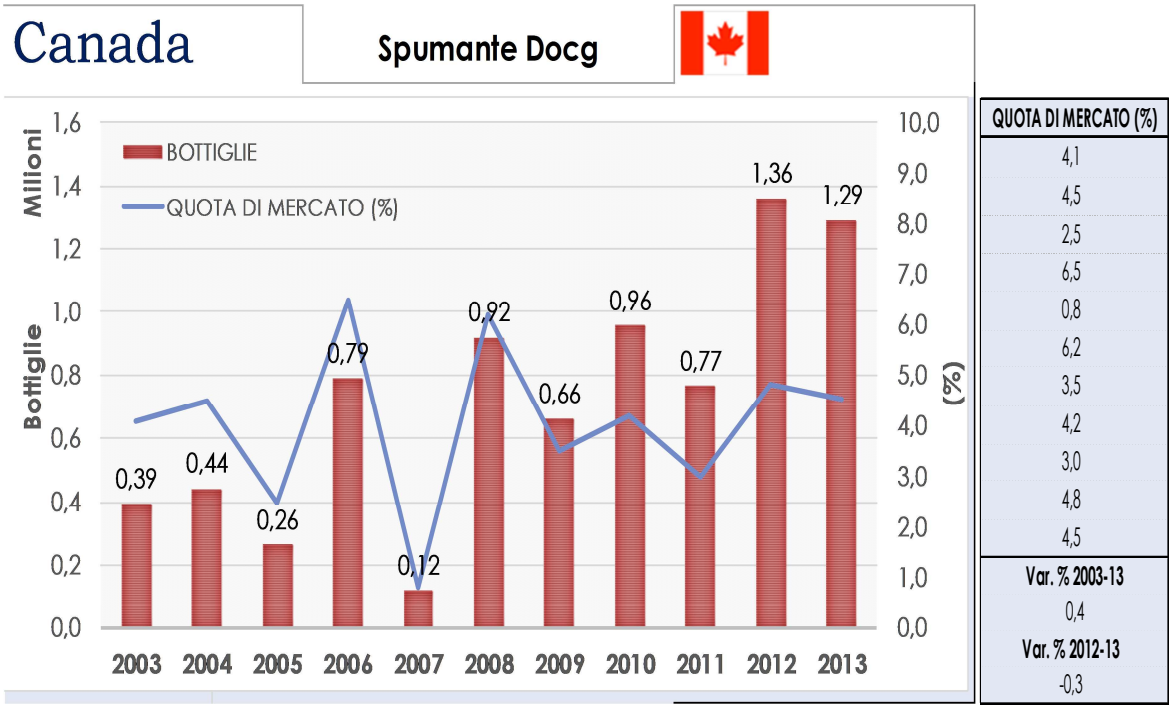
2013	Ex-cellars value	% Var. 2012-13
	7.3 Million €	-8.3 %
2013	**Volume**	**% Var. 2012-13**
	1.3 Million bott.	-5.1 %
2013	**Average price**	**% Var. 2012-13**
	5.63 € /bott.	-3.4 %
2013	**Market share in value terms**	**% Var. 2012-13**
	5.5 %	-0.5 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

In 2013, Canada accounted for a market share of 5.5% of exports of our D.O.C. Spumante, corresponding to a value of 7.3 million Euros (down 8.3% on 2012).

In terms of volume, the Canadian market revealed a decline in sales of 5.1% compared to 2012.



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

Of the markets that have shown significant growth in imports, Canada is one of those that have registered the best performances in volume terms over the long term, with an increase of 228.0% compared to 2003.

Austria

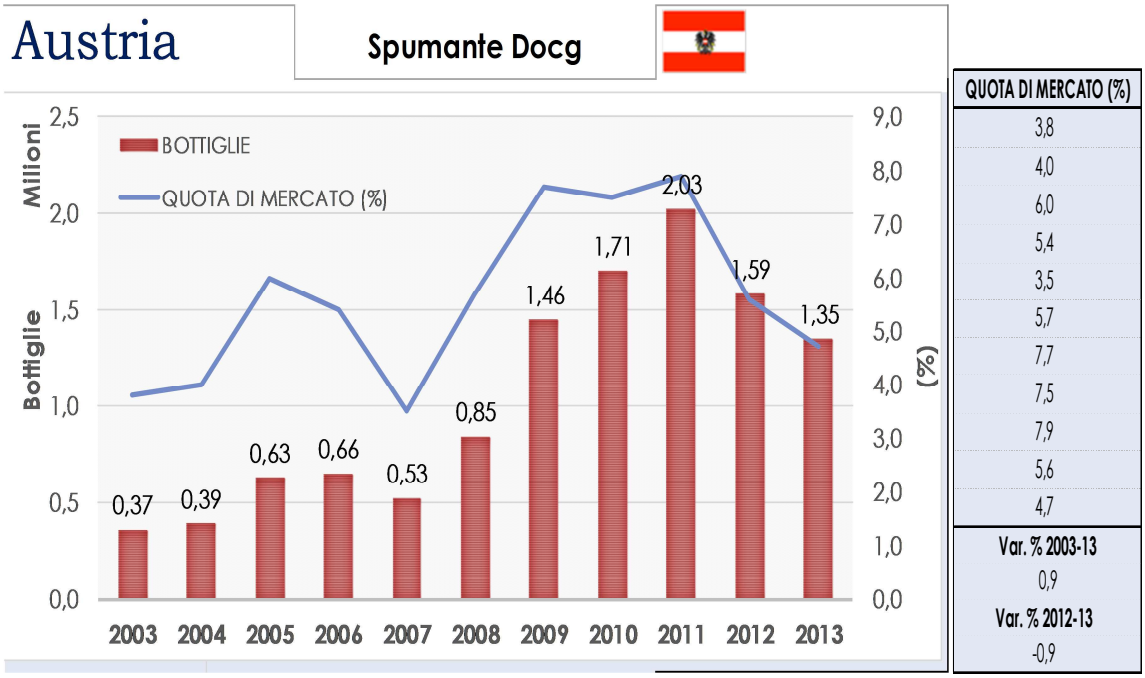
2013	Ex-cellars value	% Var. 2012-13
	6.4 Million €	-17.6 %
2013	Volume	% Var. 2012-13
	1.4 Million bott.	-14.8 %
2013	Average price	% Var. 2012-13
	4.73 € /bott.	-3.2 %
2013	Market share in value terms	% Var. 2012-13
	4.8 %	-1.0 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

As one of the countries that has always traditionally consumed our D.O.C.G. sparkling wine, Austria confirmed its position in 2013 as the seventh most important market for the Denomination in value terms, with a turnover of 6.4 million Euros. However this represents a downswing of 17.6% year-on-year.

In 2013, the volume of sales absorbed by Austria (1.4 million bottles) revealed yet another drop, a decrease of 14.8% compared to 2012.



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

In the long term, the Austrian market has shown significant growth in volume (up 270.6% compared to 2003), though it has revealed a major contraction in the course of the last two years.

The Russian Federation

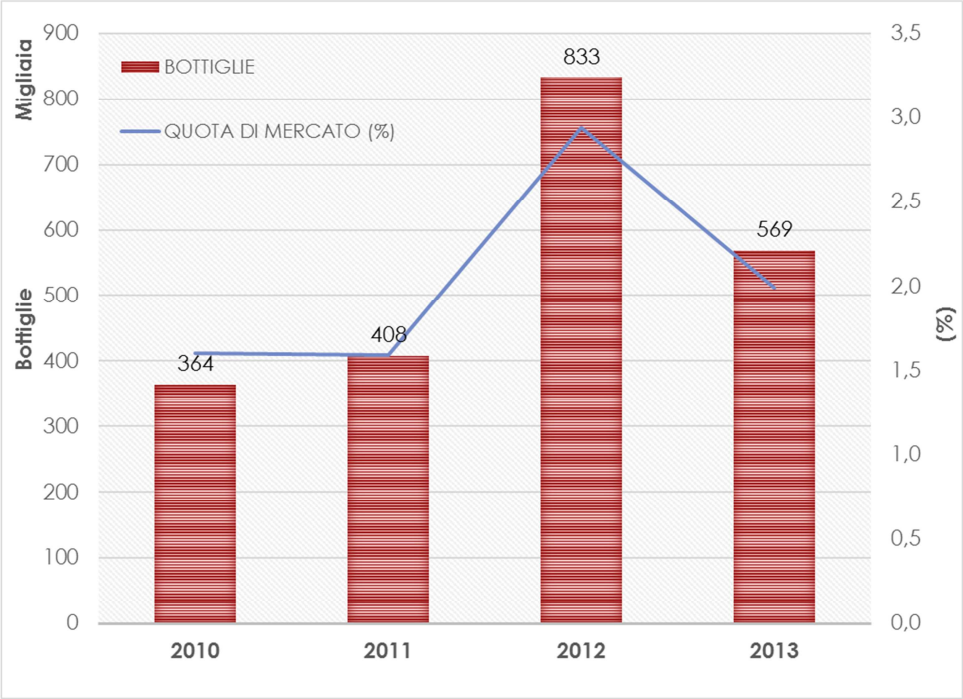
2013	Ex-cellars value	% Var. 2012-13
	2.5 Million €	-25.7 %
2013	Volume	% Var. 2012-13
	569 Thousand bott.	-31.8 %
2013	Average price	% Var. 2012-13
	4.36 € /bott.	+8.9 %
2013	Market share in value terms	% Var. 2012-13
	1.9 %	-0.7 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

In 2013, the Russian Federation registered sales in value terms of 2.5 million Euros, corresponding to a contraction of 25.7% year-on-year.

This change in trend was accompanied by a major downturn in the volume of sales, 31.8% lower than in 2012.



The medium-term market trend in volume terms (2010-2013)

In the medium term (2010-13), the Russian market has registered growth in volume of 56.0%, in spite of the downturn in the last year.

Other European countries

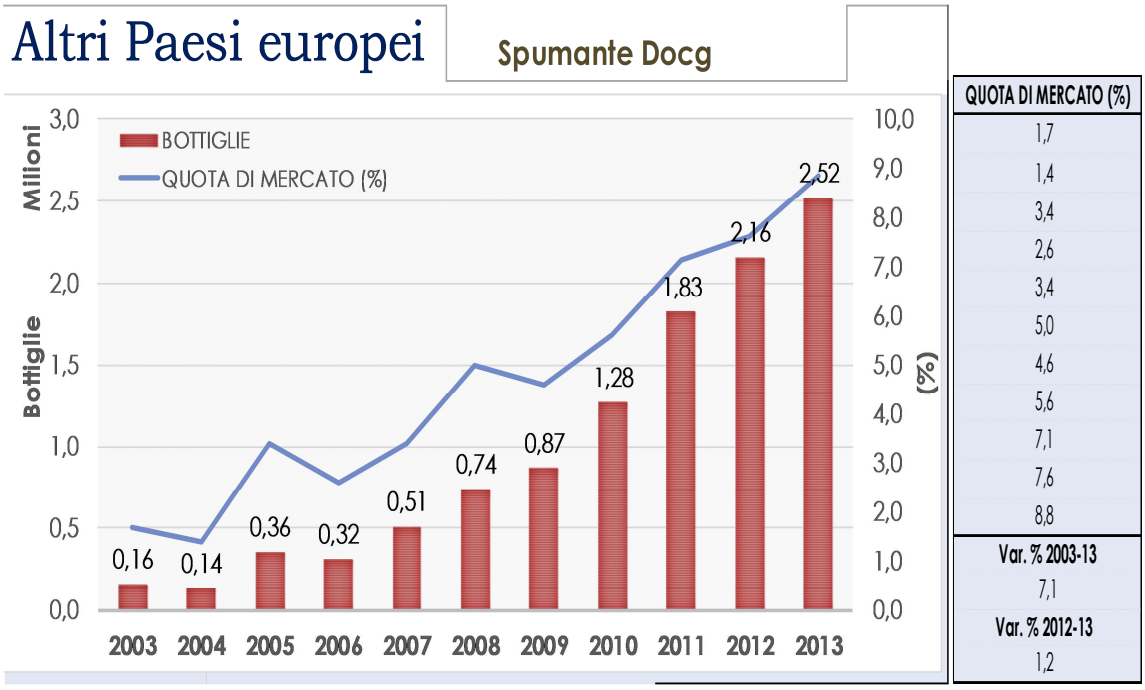
2013	Ex-cellars value	% Var. 2012-13
	11.0 Million €	+26.9 %
2013	Volume	% Var. 2012-13
	2.5 Million bott.	+16.7 %
2013	Average price	% Var. 2012-13
	4.37 € /bott.	+8.8 %
2013	Market share in value terms	% Var. 2012-13
	8.3 %	+1.8 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

** The analysis of the results of the group of other European countries includes those of France, Spain, the countries of Eastern Europe and the Russian Federation.

The short-term market trend (2012-2013)

The area of the other European countries confirmed the high rate of growth in imports of our D.O.C.G. sparkling wine, registering an increase of 26.9% over 2012. This performance has led to this area absorbing 2.5 million bottles overall (16.7% up on the previous year).



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

In this area, the recent high rate of growth in imports in value terms of our D.O.C.G. sparkling wine has been accompanied by a major increase in volume sales over this ten-year period (up 1,444.8% compared to 2003).

Benelux

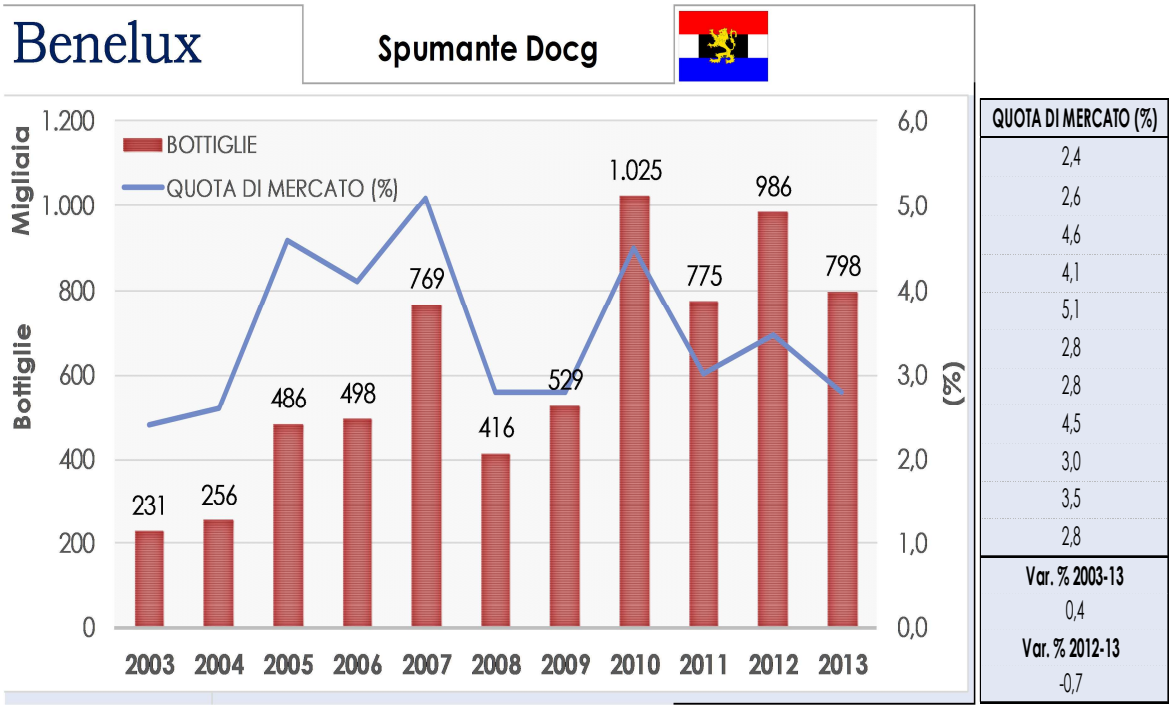
2013	Ex-cellars value	% Var. 2012-13
	3.7 Million €	-23.5 %
2013	Volume	% Var. 2012-13
	798 Thousand bott.	-19.1 %
2013	Average price	% Var. 2012-13
	4.66 € /bott.	-5.5 %
2013	Market share in value terms	% Var. 2012-13
	2.8 %	-0.9 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

The Benelux countries confirmed their position in 2013 as the tenth market area in value terms for our D.O.C.G. sparkling wine with imports of 3.7 million Euros, but with a decline of 23.5% compared to the previous year.

This change was accompanied by a contraction of its market share in tems of volume, which fell from 986,000 bottles in 2012 to 798,000 bottles in 2013.



QUOTA DI MERCATO (%)
2,4
2,6
4,6
4,1
5,1
2,8
2,8
4,5
3,0
3,5
2,8
Var. % 2003-13
0,4
Var. % 2012-13
-0,7

Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

With reference to the period from 2003 to 2013, however, the Benelux registered a significant increase of 246.3% in the sales of our D.O.C.G. sparkling wine.

Scandinavia

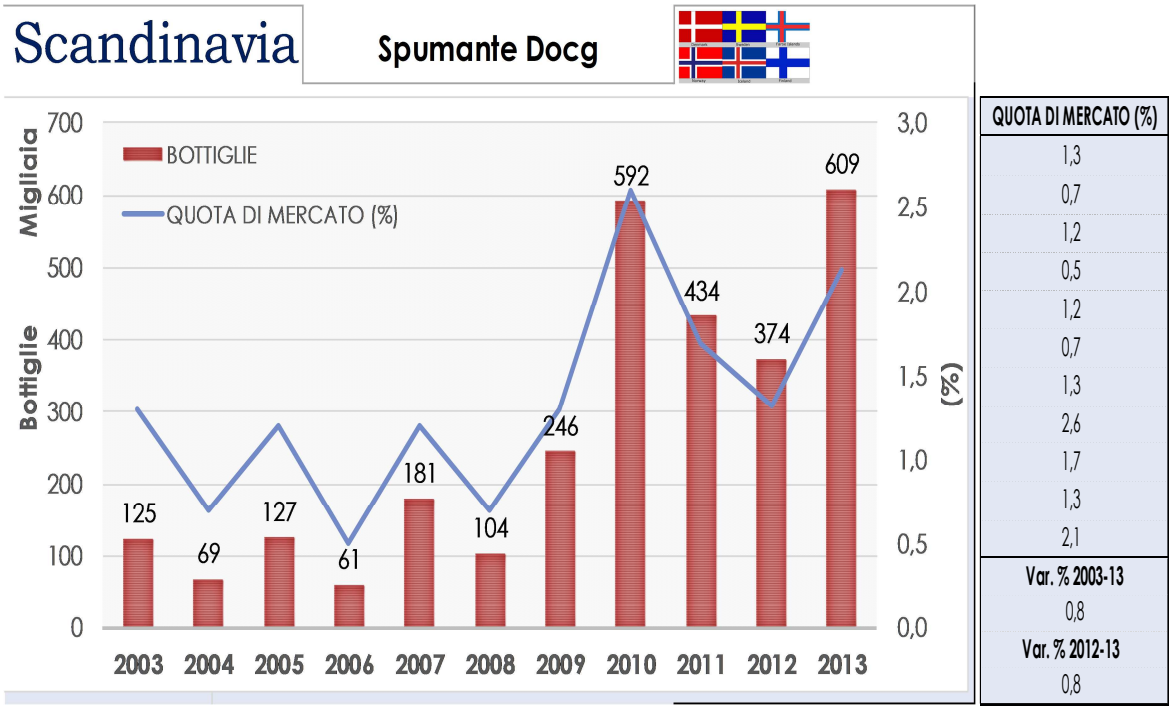
2013	Ex-cellars value	% Var. 2012-13
	3.0 Million €	+62.1 %
2013	Volume	% Var. 2012-13
	609 Thousand bott.	+62.8 %
2013	Average price	% Var. 2012-13
	4.86 € /bott.	-0.4 %
2013	Market share in value terms	% Var. 2012-13
	2.2 %	+0.9 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

In 2013, the area of Scandinavia represented export sales of our D.O.C.G. sparkling wine to the value of 3 million Euros, up 62.1% to 2012.

The Scandinavian market was characterized by a notable recovery of sales in terms of volume, reaching a new high in 2013 of 609,000 bottles, corresponding to an increase of 62.8% year-on-year.



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

By attaining a volume of 609,000 bottles in 2013, the Scandinavian market reached a new high in volume terms (up 387.5% compared to 2003), ascribable to a large extent to the recovery obtained in the last year (an increase of 62.8%).

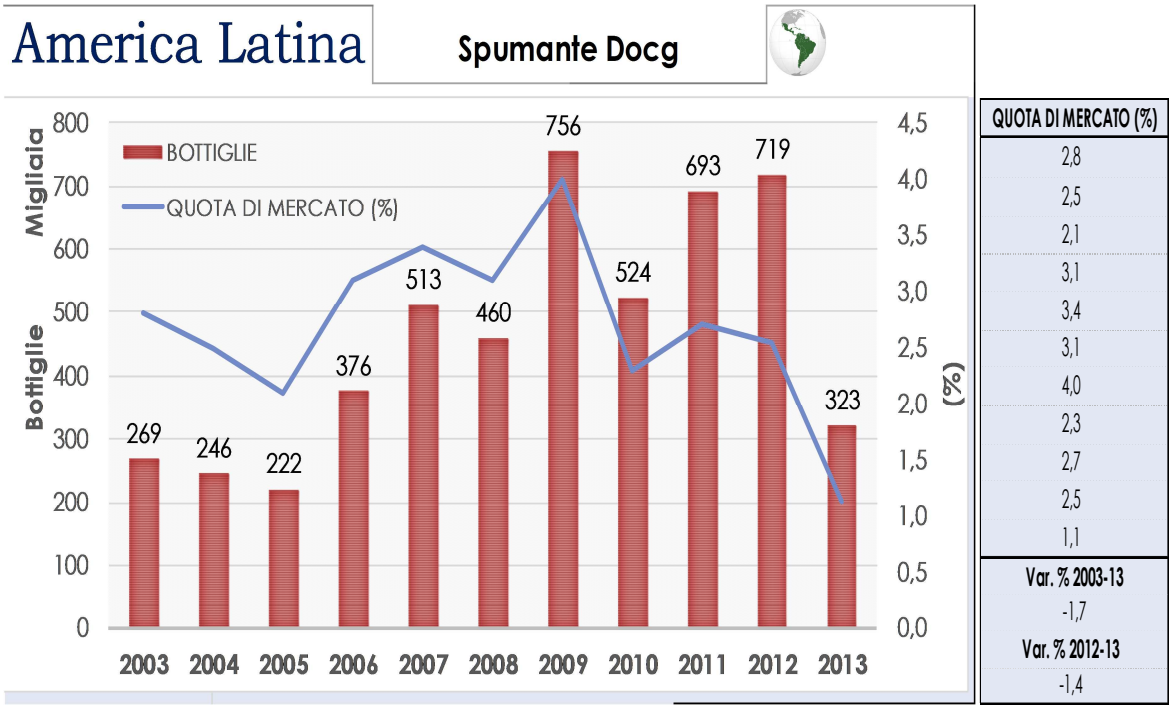
Latin America

2013	Ex-cellars value	% Var. 2012-13
	1.3 Million €	-57.9 %
2013	Volume	% Var. 2012-13
	323 Thousand bott.	-55.1 %
2013	Average price	% Var. 2012-13
	4.13 € /bott.	-5.9 %
2013	Market share in value terms	% Var. 2012-13
	1.0 %	-1.4 %

* Sparkling D.O.C.G. and Rive D.O.C.G.
** The figures include Brazil.

The short-term market trend (2012-2013)

In 2013, the overall value of exports of our D.O.C.G. sparkling wine to the countries of Latin America was 1.3 million Euros, 57.9% down compared to the previous year. Sales in volume terms towards this area showed a fall year-on-year of 55.1%, in the form of just over 320,000 bottles.



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

In the period 2003-13, Latin America registered growth in the imports of our D.O.C.G. sparkling wine, with an increase in volume terms of 19.9%.

Brazil

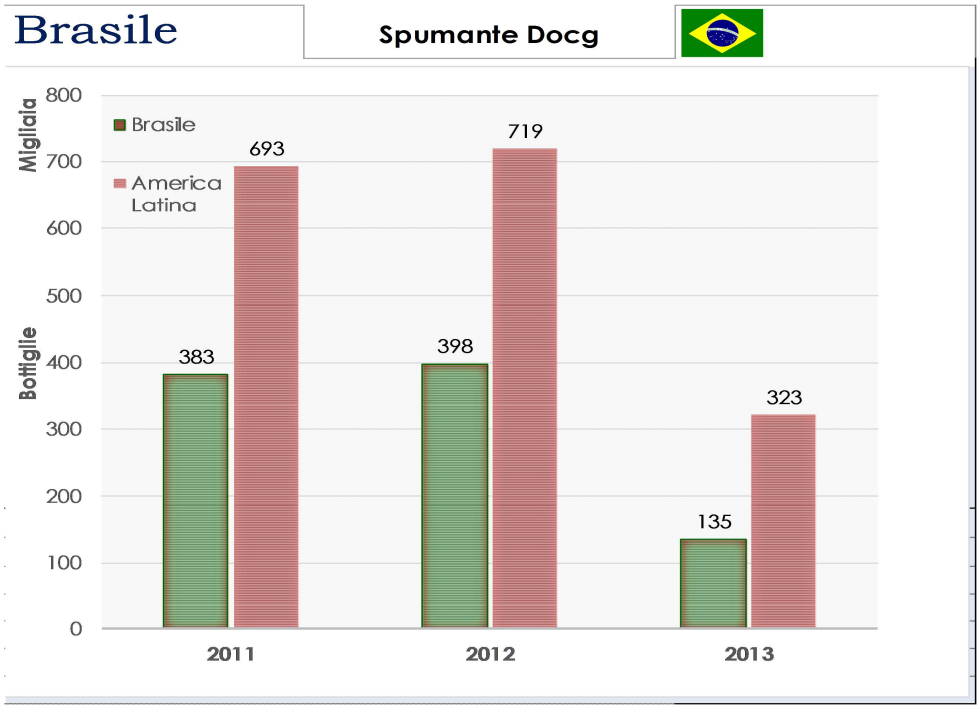
2013	Ex-cellars value	% Var. 2012-13
	556 Thousand €	-68.1 %
2013	Volume	% Var. 2012-13
	135 Thousand bott.	-66.0 %
2013	Average price	% Var. 2012-13
	4.11 € /bott.	-6.2 %
2013	Market share in value terms	% Var. 2012-13
	0.4 %	-0.9 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

In 2013 Brazil represented 41.7% of exports of our D.O.C.G. sparkling wine to the Latin American area, for a value of 556,000 Euros, marking a drop of 68.1% from the previous year.

In terms of volume, the share of 135,000 bottles absorbed by the Brazilian market was no less than 66.0% lower than in 2012.



QUOTA DI MERCATO (%)
1,5
1,4
0,5
Var. % 2011-13
-1,0
Var. % 2012-13
-0,9

Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The medium-term market trend in volume terms (2011-2013)

The trend as regards the volumes of exports of our D.O.C.G. sparkling wine absorbed by the Brazilian market echoes closely that registered in Latin America, with a contraction of 64.6% compared to 2011.

Australia & New Zealand

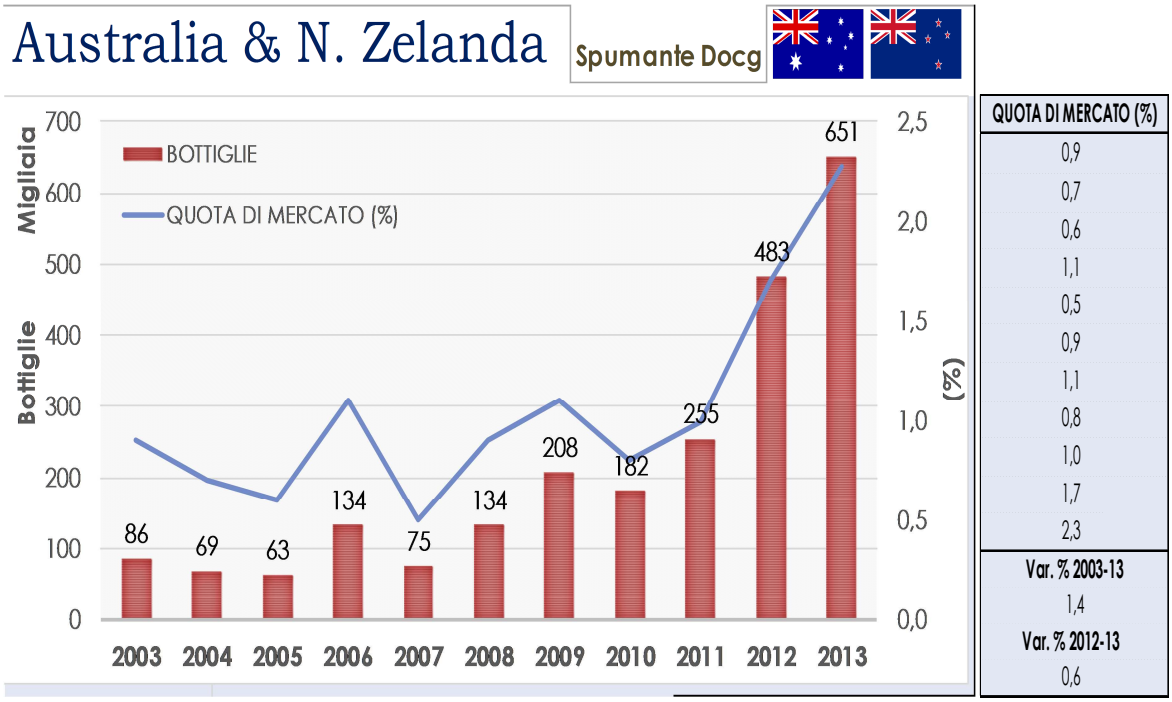
2013	Ex-cellars value	% Var. 2012-13
	3.3 Million €	+32.8 %
2013	Volume	% Var. 2012-13
	651 Thousand bott.	+34.8 %
2013	Average price	% Var. 2012-13
	5.07 € /bott.	-1.5 %
2013	Market share in value terms	% Var. 2012-13
	2.5 %	+0.6 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

Australia and New Zealand represent the ninth market in terms of value for exports of our D.O.C.G. sparkling wine, with a value of 3.3 million Euros, up 32.8% on the previous year.

The variation in the trend of sales in volume terms destined for that area revealed a further and significant increase of 34.8% compared to 2012.



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

The two Australasian countries registered, in the period 2003-2013, very substantial growth in their market share, going from 86,000 bottles in 2003 to 651,000 bottles in 2013 (up 653.2%).

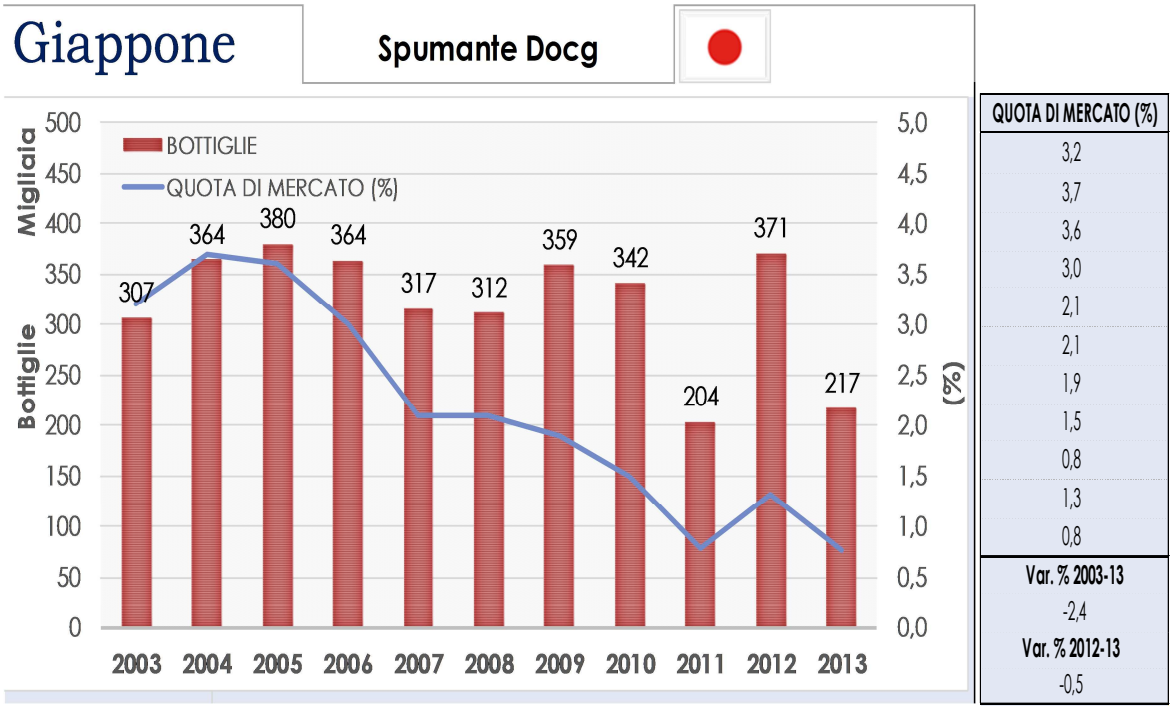
Japan

2013	Ex-cellars value	% Var. 2012-13
	1.3 Million €	-43.0 %
2013	Volume	% Var. 2012-13
	217 Thousand bott.	-41.4 %
2013	Average price	% Var. 2012-13
	6.13 € /bott.	-2.7 %
2013	Market share in value terms	% Var. 2012-13
	1.0 %	-0.8 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

In 2013, Japan confirmed its position, with an export value of 1.3 million Euros, as one of the minor markets for the sale of our D.O.C.G. sparkling wine, showing a significant contraction in sales of 43.0% compared to 2012.
This variation was accompanied by a reduction of 41.4% in the volume absorbed by this country compared to the previous year.



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

In a long-term perspective, exports in 2013 towards Japan reached a level similar to that attained in 2011, leading to a contraction of 29.3% compared to 2003.

China & Hong Kong

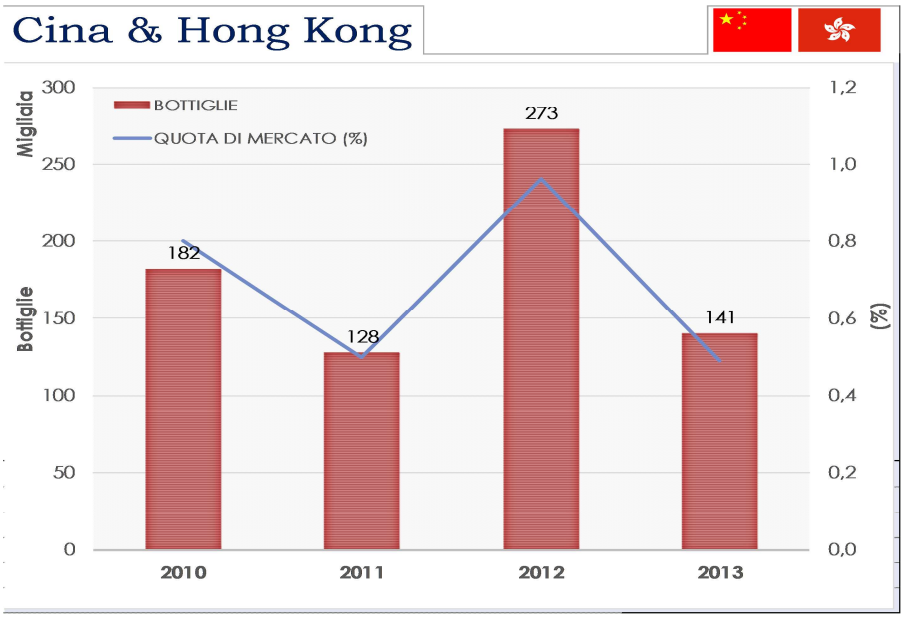
2013	Ex-cellars value	% Var. 2012-13
	694 Thousand €	-44.6 %
2013	Volume	% Var. 2012-13
	141 Thousand bott.	-48.5 %
2013	Average price	% Var. 2012-13
	4.94 € /bott.	+7.7 %
2013	Market share in value terms	% Var. 2012-13
	0.5 %	-0.4 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

With a market share in 2013 of 694,000 Euros, China and Hong Kong represent one of the new export areas for our D.O.C.G. sparkling wine, with a market share of 0.5% in value terms.

Compared to the previous year, the volume absorbed by the Chinese and Hong Kong markets showed a contraction, passing from 273,000 bottles in 2012 to 141,000 bottles in 2013 (down 48.5% in volume).



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The medium-term market trend in volume terms (2010-2013)

With regard to the period 2010-2013, China and Hong Kong have registered average imports of some 180,000 bottles a year; 2013 showed a reduction of 22.9% compared to 2010.

Other Asian & African countries

2013	Ex-cellars value	% Var. 2012-13
	1.5 Million €	-7.0 %
2013	Volume	% Var. 2012-13
	303 Thousand bott.	-25.1 %
2013	Average price	% Var. 2012-13
	4.95 € /bott.	+24.1 %
2013	Market share in value terms	% Var. 2012-13
	1.1 %	-0.1 %

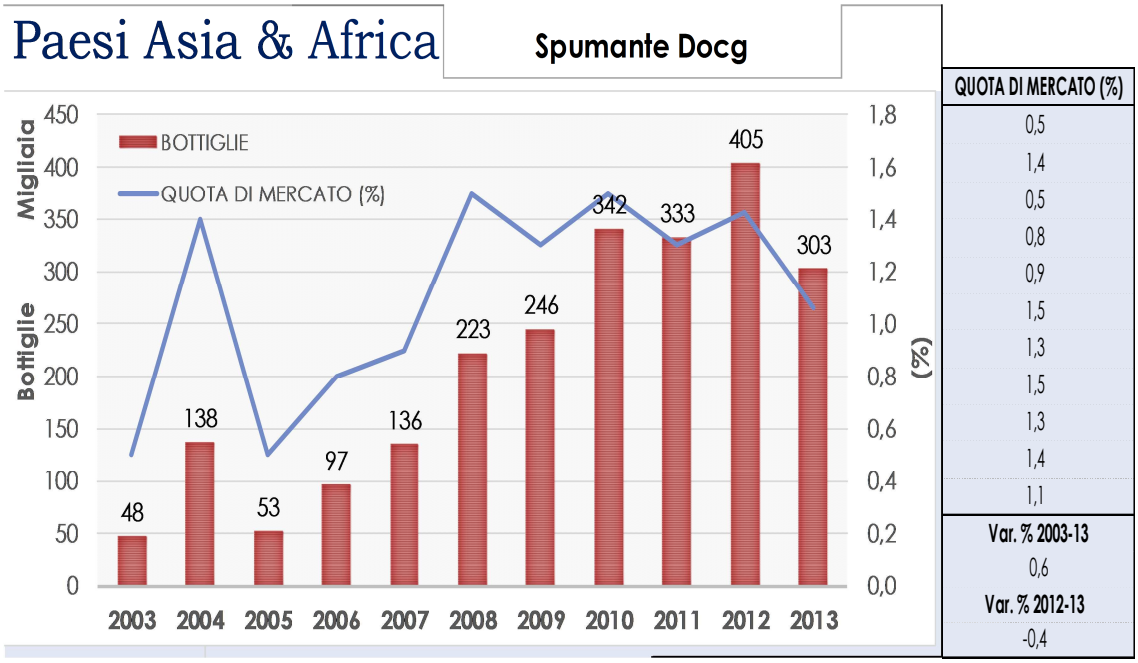
* Sparkling D.O.C.G. and Rive D.O.C.G.

** The figures include China & Hong Kong, South-East Asia, Africa & the Middle East.

The short-term market trend (2012-2013)

Overall, the group of Asian and African countries registered imports to the value of 1.5 million Euros, for a market share of just over 1% of the exports of our D.O.C.G. sparkling wine. The value registered by sales carried out in this area revealed a reduction of 7% compared to 2012.

In terms of volume, the sales absorbed by the Asian/African area registered a significant downturn of 25.1% on a year-on-year basis.



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

The long-term market trend in volume terms (2003-2013)

In the period 2003-2013, exports of our D.O.C.G. sparkling wine towards Asia and Africa were characterized by a high average rate of market acceptance, increasing by no less than 531.1%.

South-East Asia

2013	Ex-cellars value	% Var. 2012-13
	455 Thousand €	+17.6 %
2013	Volume	% Var. 2012-13
	101 Thousand bott.	+3.4 %
2013	Average price	% Var. 2012-13
	4.49 € /bott.	+13.8 %
2013	Market share in value terms	% Var. 2012-13
	0.3 %	+0.1 %

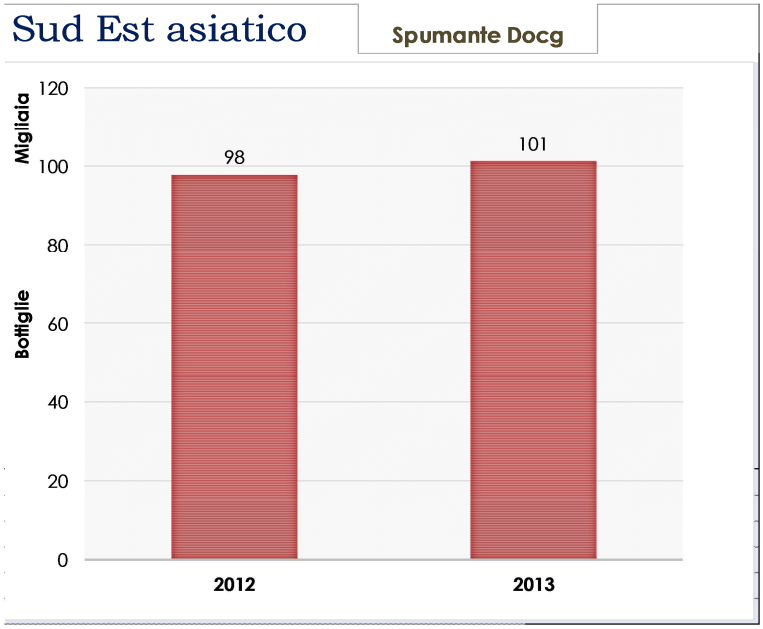
* Sparkling D.O.C.G. and Rive D.O.C.G.

** South-East Asia is a geographical macro-region lying to the south of China and to the north of Australia, between the Indian and Pacific Oceans.

The short-term market trend (2012-2013)

In 2013, within the Asian/African area, the exports of our D.O.C.G. sparkling wine absorbed by the macro-area of South-East Asia represented a value of 455,000 Euros, showing growth of 17.6% year-on-year.

This increase in the value of exports towards South-East Asia has also been accompanied by an increase in volume, up 3.4% from 2012.



Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

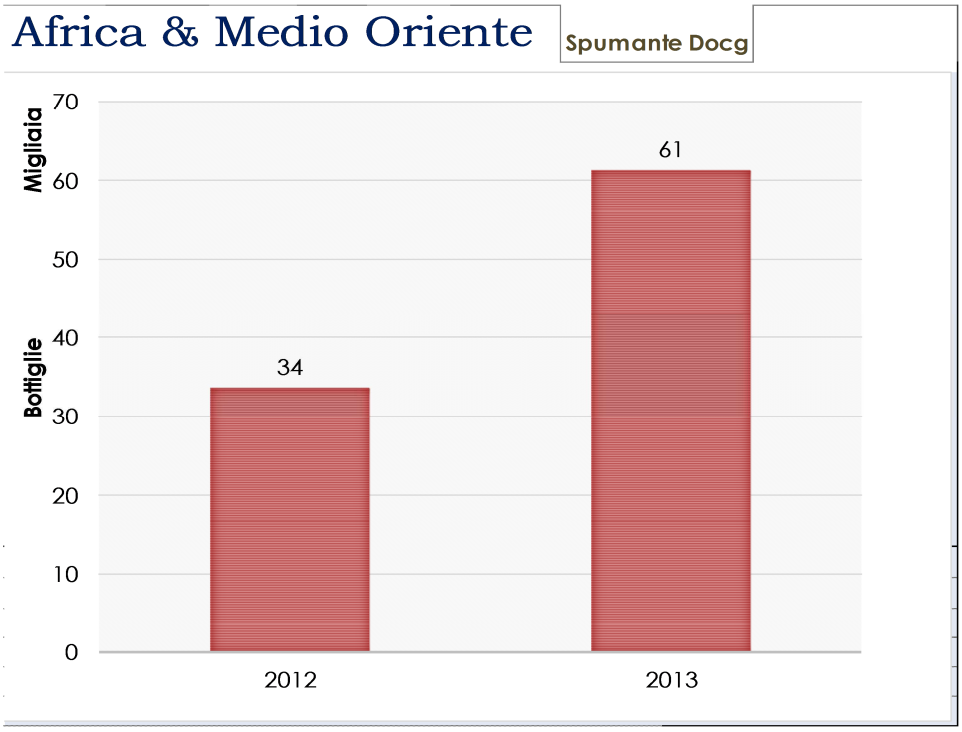
Africa & the Middle East

2013	Ex-cellars value	% Var. 2012-13
	305 Thousand €	+88.6 %
2013	Volume	% Var. 2012-13
	61 Thousand bott.	+82.3 %
2013	Average price	% Var. 2012-13
	4.98 € /bott.	+3.4 %
2013	Market share in value terms	% Var. 2012-13
	0.2 %	+0.1 %

* Sparkling D.O.C.G. and Rive D.O.C.G.

The short-term market trend (2012-2013)

Within the Asian/African area, the exports of our D.O.C.G. sparkling wine destined for the macro-area of Africa and the Middle East represented in 2013 a value of 305,000 Euros, marking a major increase in sales both in value (+88.6%) and in volume (+82.3%) terms.



QUOTA DI MERCATO (%)
0,1
0,2
Var. % 2012-13
0,1

Sources: C.i.r.v.e. – Conegliano, 2014; Conegliano Valdobbiadene D.O.C.G., 2014.

Appendix

A note on methodology

The average bottle price in foreign countries was obtained from the producers who are in the major markets. For other countries it was obtained from the Global Trade Atlas (GTA) database.

CONSORZIO PER LA TUTELA DEL 'CONEGLIANO VALDOBBIADENE DOCG'
Via Roma 7 - Villa Brandolini
31053 - Solighetto di Pieve di Soligo (TV)
http://www.prosecco.it

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