



# IMPRESE VITIVINICOLE: I NODI DELL'OGGI E LE SFIDE DEL DOMANI

Oriana Romeo  
Area Studi Mediobanca

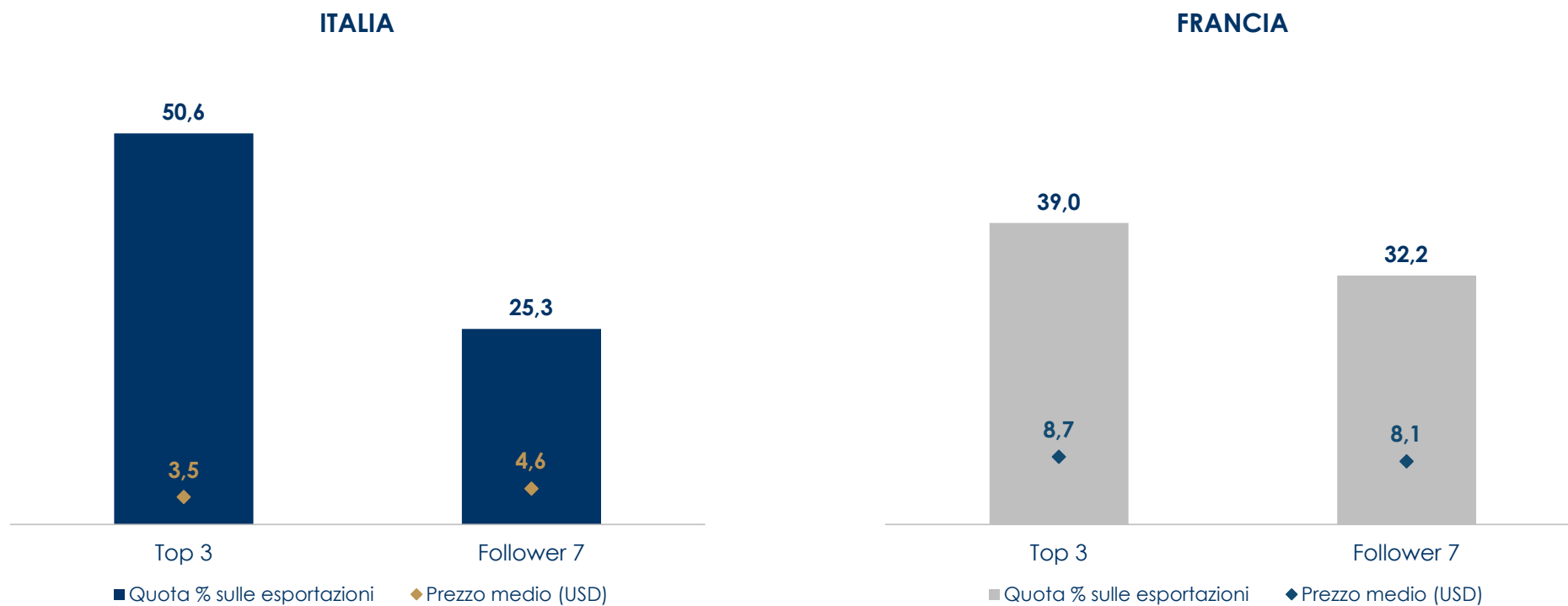
**Milano, 12 ottobre 2022**



AREA STUDI  
MEDIOBANCA

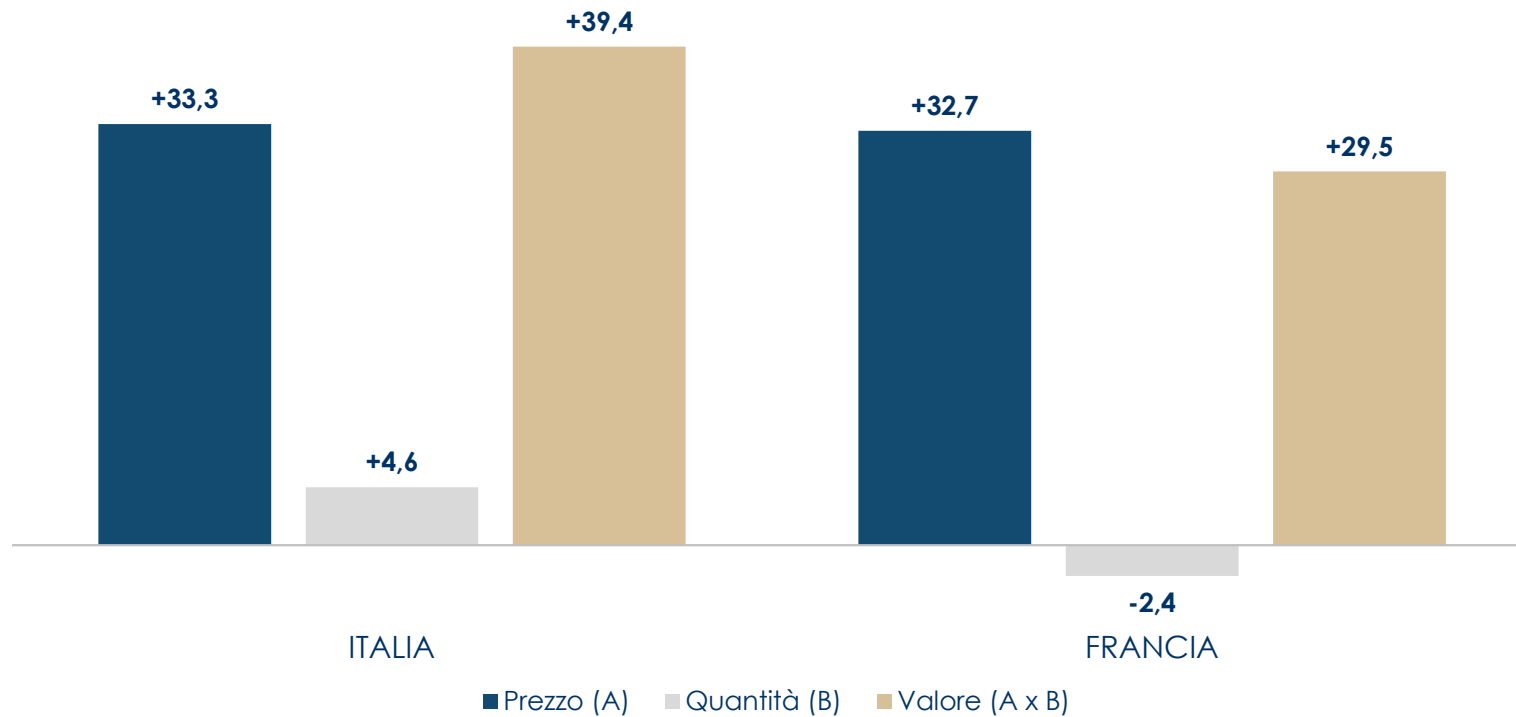
# L'EXPORT ITALIANO: PIÙ CONCENTRATO, DI PROSSIMITÀ E ANCORA 'POVERO'

## Composizione dell'export e suo prezzo medio



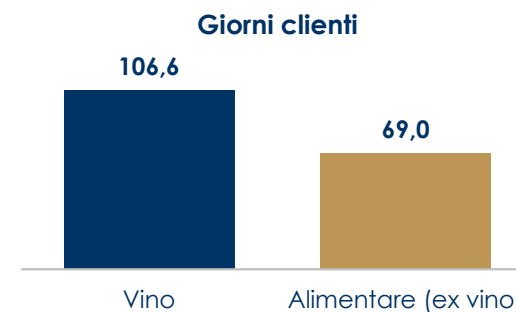
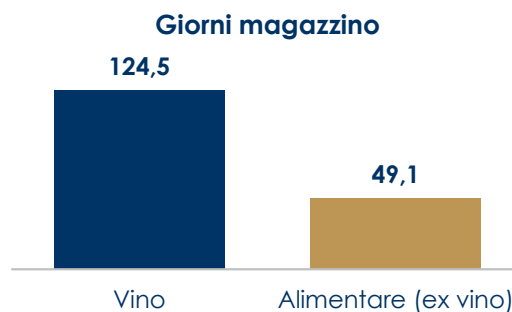
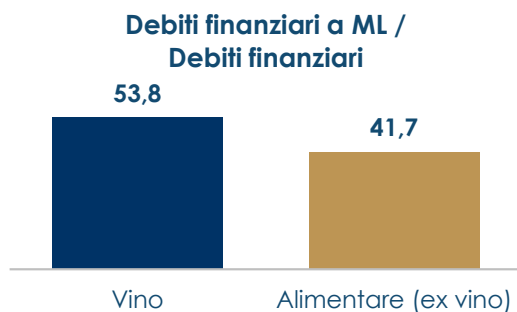
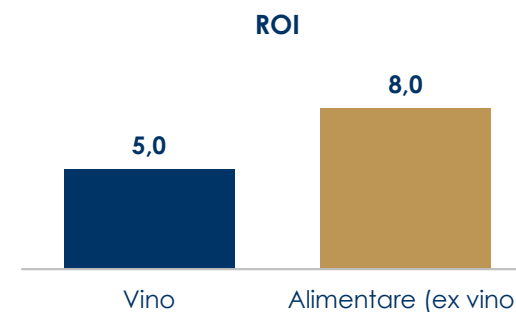
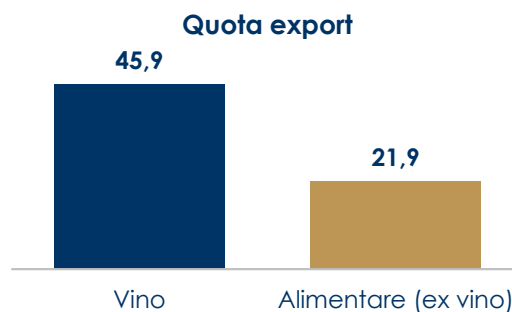
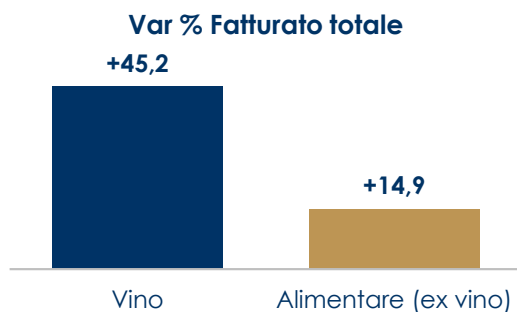
## MA HA FATTO MEGLIO DI QUELLO FRANCESE

Var % 21/12



## CARTA D'IDENTITÀ: VINO VS FOOD

Valori medi (ultimo decennio)



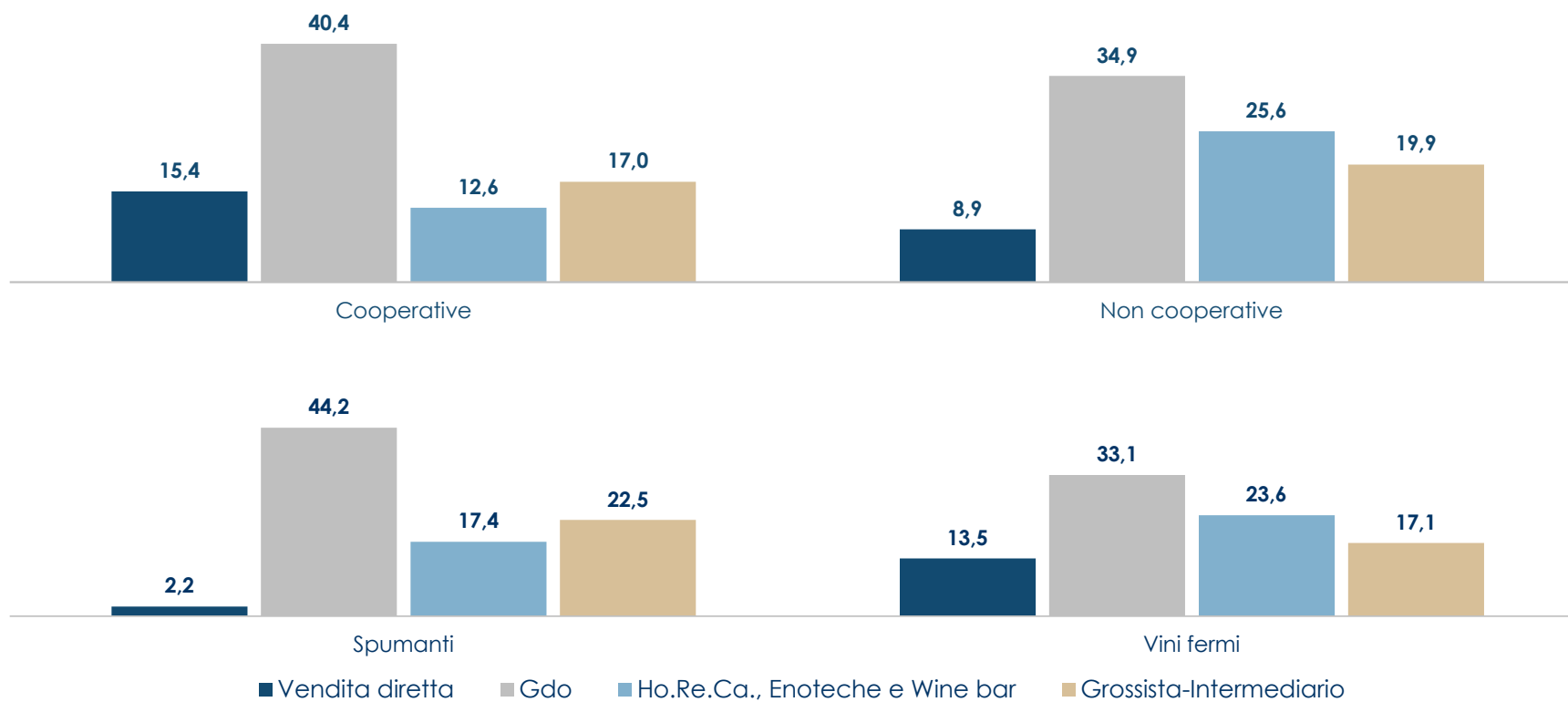
## I TANTI CONNOTATI DEL VINO: I BILANCI...

Valori medi (ultimo quinquennio)

Indicatore	Cooperative	Non Cooperative	Spumanti	Vini fermi
Quota export	39,7	55,6	40,1	53,1
ROI	2,8	6,8	6,4	5,5
Debt Equity Ratio	114,3	47,6	50,1	66,7
Giorni magazzino	128,2	142,0	118,0	142,1

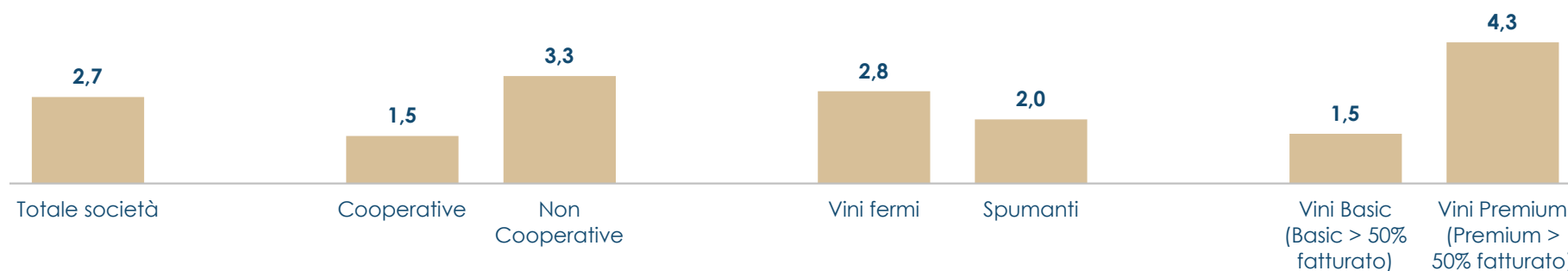
## ...E I CANALI COMMERCIALI

Vendite nazionali per canale (%)

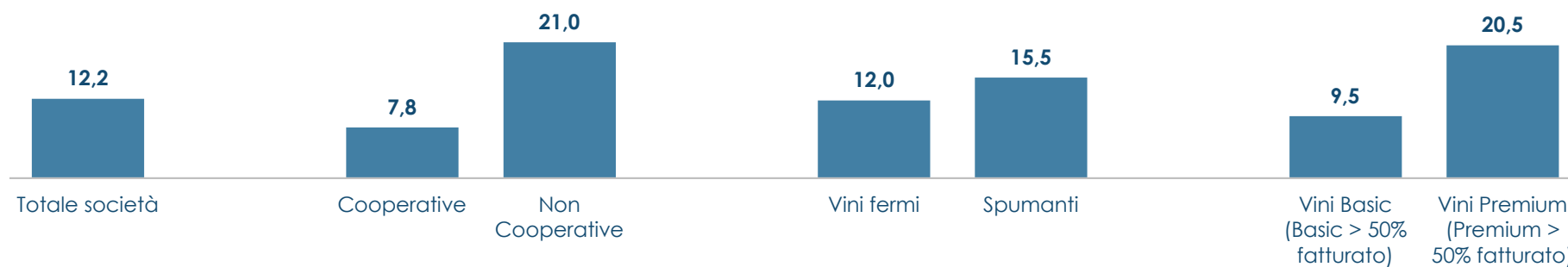


## SENZA DIMENTICARE IL 'TERZO INCOMODO'

### Incidenza % delle vendite on-line sul fatturato nazionale

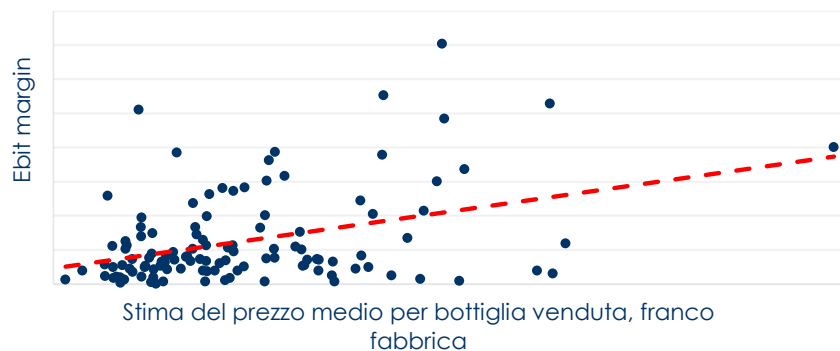


### Incidenza % delle vendite sui siti internet di proprietà sulle vendite dirette

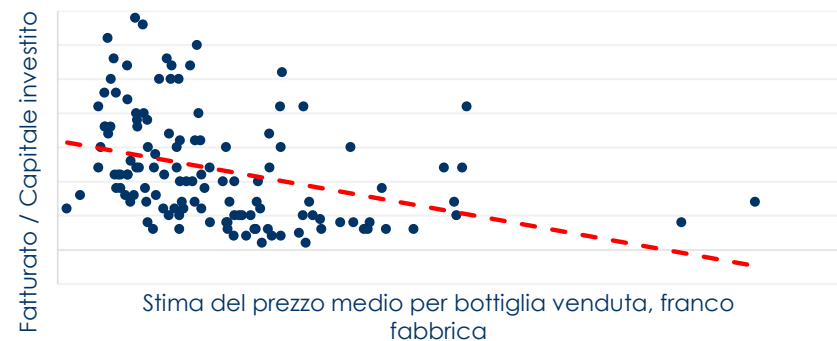


# L'AMBIGUO RAPPORTO TRA QUALITÀ E PROFITABILITÀ

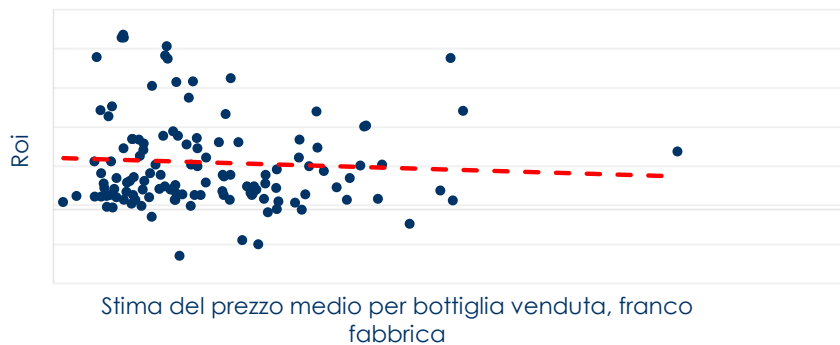
**Imporsi come price maker paga...**



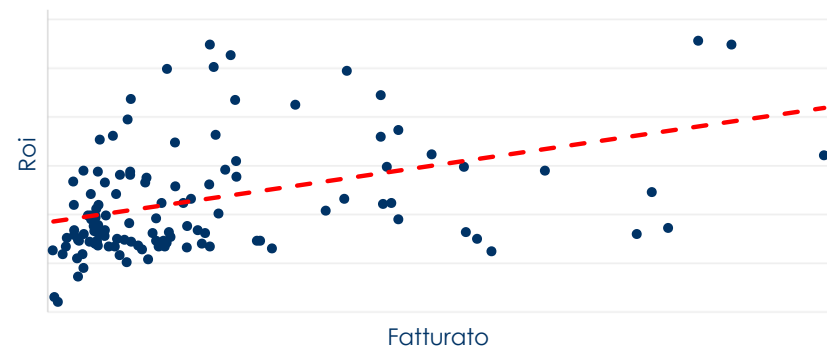
**...ma comporta impegno...**



**...con esito incerto...**



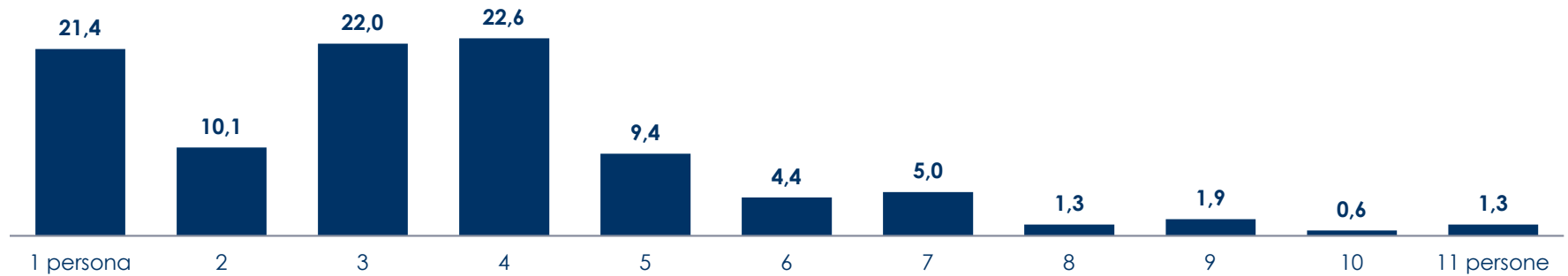
**...a meno che non si cresca**



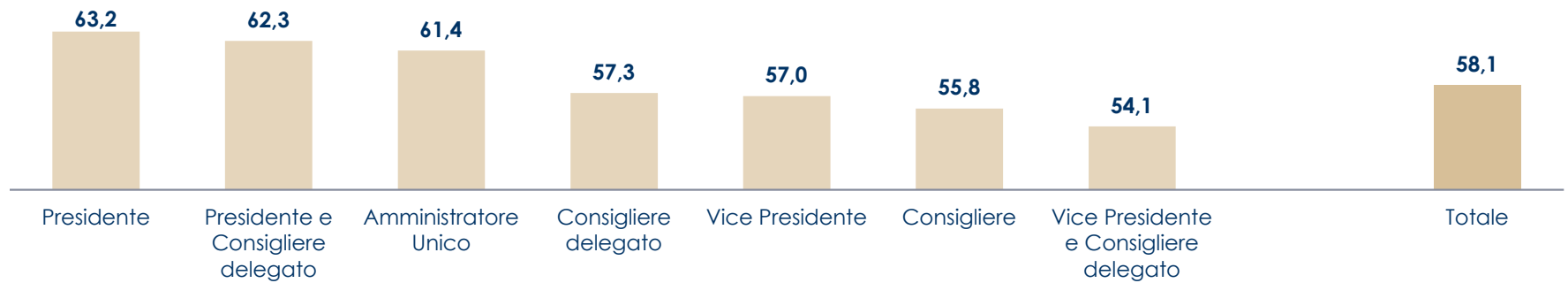


## MA SI È DAVVERO PRONTI...

Frequenza % dei board in base alla propria numerosità



Età media (anni) per carica



## ...AD AFFRONTARE IL PROSSIMO FUTURO?

<b>Value</b>	<b>Boomers</b>	<b>Millennials</b>	<b>Action</b>
Support group	Family	Friends	Drive club socialization
Choice in food	Don't eat if it's bad for you	Only eat if it's good for you	List ingredients, calories; show how it's "better for you"
Business	Capitalism is the path to individual wealth	Wealth comes with social responsibility	Define your contribution to social values
Diversity	Civil Rights Movement drove change	Social and ethnic diversity drives change	Diversify in staffing, advertising and tasting room
Landfills and waste	Disposable culture	Green, reuse and repurpose culture	Lower carbon footprint with better packaging and sustainability strategies
Spending	Conspicuously	On important things	Improve wine value by selling on important personal values
Fun	Work before fun	With everything!	Embed into events, tasting room, marketing and communications

Grazie per l'attenzione



AREA STUDI  
MEDIOBANCA

[www.areastudimediobanca.com](http://www.areastudimediobanca.com)

