2026 wine export: a ‘laser focus’ year

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Industry leaders Flavio Geretto, Vitaliano Tirrito, and Luca Ardiri analyze the complex landscape of Italian wine exports for 2026. Facing rising duties, shifting consumer habits, and economic uncertainty in key markets like the USA and Germany, they advocate for a “laser focus” strategy centered on brand identity, pricing consistency, and innovative distribution models to ensure long-term resilience.

Certain conversations are born without an agenda, and for this reason, they manage to tell the truth about reality more effectively. This was not a formal convention or a staged panel, but a table, a lunch, and three professionals who live the Italian wine export reality every day in the field. **Luca Ardiri, Vitaliano Tirrito, and Flavio Geretto brought their direct experience to the table.**

The context is informal, but the topics are far from light. The moment Italian wine is experiencing in international markets is complex, layered, and no longer reducible to a single variable. The question that opens the discussion is direct,almost brutal: what is your current state of mind regarding the markets? **And above all: what are the real fears, the ones that truly matter, if we stop hiding behind reassuring formulas?**

The shared response is clear: we are not facing a passing crisis, but a fundamental turning point. It is a phase where duties, inflation, declining consumption, and cultural changes overlap, putting pressure on models that seemed to work until a few years ago. **A clear awareness immediately emerges: 2026 will not be a year for improvisation, but one that rewards those who know how to choose.**

Pessimism, uncertainty, and stagnation: the new market climate

If there is one sentiment that many markets share, Vitaliano Tirrito defines it without hesitation: pessimism and uncertainty. But the real problem is not the emotional climate itself, but its most dangerous consequence: stagnation. **In markets like Germany, Switzerland, and Japan, fear often translates into a decision-making paralysis that blocks investment, initiatives, and the capacity for reaction.**

In this scenario, the role of the export manager changes profoundly. It is no longer enough to “do one’s job well” in the traditional sense. **Tirrito says it with a formula that hits home: today one must also provide “therapy” to partners, reassuring them, accompanying them, and demonstrating that a solution is possible.** Ardiri translates the concept pragmatically: the export manager must be a problem solver.

Flavio Geretto adds the human dimension: helping the partner today means building the conditions so that, tomorrow, that

partner chooses not to abandon you. **Because in difficult times, importers will have to make a selection, and only the relationships that have demonstrated value, planning, and a real presence will remain.** This shift requires a deeper level of commitment from producers than ever before.

United States: the problem is not just the duty, but the system

When discussing critical markets, the United States inevitably takes center stage. While the issue of duties is obvious, all three experts agree that focusing solely on percentages is reductive. The real risk is structural. **Tirrito describes the choice to modify the operating model by cutting a tier to make management leaner and more competitive, better absorbing the impact of duties.**

Ardiri shifts the focus to a deeper question: what if the problem is the consumer's actual spending power rather than just price increases? In a context of high real inflation and increasing uncertainty, wine risks falling out of purchase priorities.**This tension is exacerbated by the well-known multiplier of the three-tier system, where a small increase at the source becomes much heavier at the shelf.**

Geretto warns against the temptation to respond with immediate discounts: lowering prices today can permanently compromise a brand's positioning for the future. **In a market where identity and perceived value are everything, it is a risk that could cost a winery its place in the American market long-term.** Protecting the price point is essential for brand survival.

UK and Germany: downgrade, taxes, and new invisible barriers

While the United States represents a clear challenge, the UK

tells a story of a shifting paradigm. Tirrito speaks openly about a “downgrade” in the experience: the concept of premiumization, so celebrated in recent years, has weakened. **In a market hit by taxes linked to alcohol content and contracting consumption, middle-to-low-end wines are becoming the main protagonists once again.**

In Germany, beyond the economic crisis in key sectors, new barriers are emerging in the form of environmental regulations. Geretto notes that rules regarding glass weight risk becoming obstacles to entry rather than real tools for sustainability. **In the world of sparkling wines, this touches on technical aspects that directly affect the quality and safety of the final product in the bottle.**

This raises a crucial question: is the consumer willing to accept a different product in the name of a regulatory requirement? According to Geretto, the answer is no. The consumer judges what is in the glass first and foremost. **If the tasting experience is not up to par, sustainability credentials alone are not enough to compensate for a perceived loss in quality.**

Not just reds: what is really suffering and what is holding steady

The debate on product categories breaks another common cliché. It is not true that “only reds are suffering.” Tirrito emphasizes that quality sparkling wines are holding steady, and reds continue to perform in specific markets. **The real recent protagonist, however, is dry white wine, with demand so high it sometimes forces wineries to resort to allocations due to lack of product.**

Ardiri adds an often-overlooked element: the climate. With longer summers, consumption habits and seasonality are changing. There are also changing cultural pressures: health, the demonization of alcohol, and attention

to ABV. **Geretto approaches the trend of low-alcohol and dealcoholized wines with pragmatism: they are real trends, but not every single company is required to chase after them.**

The true choice is strategic: follow the trend or defend an identity, accepting different volumes but maintaining brand consistency. **Ardiri then introduces a synthesis of four solid pillars that become the backbone of the discussion for facing these complex and compressed global markets.** These pillars are designed to help wineries resist the ongoing pressure on global demand.

The four pillars to resist in difficult markets

The first pillar is the brand. Not as a narrative exercise, but as a concrete tool for defense. In markets where supply exceeds demand, the brand is what allows a producer to resist price pressure. **A strong brand identity is the only way to avoid the trap of permanent promotional cycles that erode the value of the product over time.**

The second pillar is the sales force, specifically in terms of quality and physical presence. It is no longer enough to be represented; you must be there. **A competent sales force on the ground, capable of reading the market and reporting back to the winery, is currently one of the few real sources of competitive advantage.**

The third element is a consistent pricing and promotion policy. Ardiri clarifies that discounting is not a strategy. In difficult markets, surgical management of commercial conditions is required with a medium-to-long-term vision. **The goal is to avoid destroying the positioning built over many years for the sake of a quick, temporary sales boost.**

The fourth pillar, perhaps the most innovative, is the sharing

of resources abroad. The cost of maintaining a physical market presence is becoming too high for single companies. **This leads to the necessity of creating synergies and sharing structures, information, and investments, while maintaining distinct identities to reduce overall costs and inefficiencies.**

Distribution, exclusivity, and hybrid models

On this basis, the reflection turns to distribution. The concept of exclusivity, untouchable for years, is now showing its limits. Tirrito shares experiences with hybrid models where producers serve certain clients directly while providing commissions to the importer. **Ardiri emphasizes that in a declining market, it is not enough to simply "do less badly"; one must exploit every bit of potential.**

Geretto provides examples of differentiating players and brands: choices that may feel uncomfortable at first but increase performance. **He argues that "comfort" is the enemy of growth in this current phase, and wineries must be willing to experiment with new ways of reaching the final consumer.**

Communication: wine is serious, but not solemn

The comparison concludes with the topic of communication. Ardiri is blunt: wine often tells the same stories about generations and territory using language that no longer distinguishes one brand from another. **If everyone says the same thing, the consumer eventually stops listening and the message loses all its impact.**

Tirrito adds an internal critique of the sector, noting that professionals often talk "at" each other with a tone that alienates outsiders. Wine is a serious subject, but it does not have to be presented in a solemn way. **Geretto highlights**

the example of young people drinking Prosecco in a Spritz: this is not an error, it is a data point.

From here arises the importance of hospitality, incoming tourism, and the overall experience. This is not just a source of direct revenue, but a tool for building brand ambassadors. **If a person lives an authentic experience at the winery, that relationship lasts through time, far beyond the lifespan of a simple price promotion.**

2026: a hard but decisive year

The conclusion is shared: 2026 will be a difficult year, perhaps the most complex in recent memory. However, it will also be a year of natural selection. **Tirrito calls for a "laser focus" approach: no dispersions and no random attempts at market entry without a clear, calculated plan.**

Ardiri describes a planning process already divided into quarters, with clear objectives for both turnover and margins.Geretto brings everything back to the essence: with consumption falling, the game is now played on market shares. **The final question remains: does Italian wine still know how to talk to the contemporary consumer?**

If the answer is yes, this turning point will become a massive opportunity for the industry. If the answer is no, no alternative market can compensate for the silence.

Key points

1. **The 2026 export market requires a laser focus strategy** to navigate declining consumption and global economic uncertainty.
2. **Export managers must transition into problem solvers and**

“therapists” to reassure international partners during periods of market paralysis.

3. **Protecting brand identity and maintaining pricing consistency is more vital for long-term survival** than offering short-term discounts.
4. **Future success depends on resource sharing** among wineries to offset the rising costs of maintaining a physical market presence.
5. **Communication must evolve to be less solemn** and more engaging to connect with younger, modern consumer segments.