

Piccoli: strategic rethinking to conquer an untapped audience

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Fabio Piccoli, Editorial Director of Wine Meridian, outlines key strategies for the wine industry to expand its reach, including education, branding, and tapping into emerging markets like India. He advocates for a more inclusive communication style, tailored experiences, and the importance of wine tourism to connect with younger generations and boost global consumption.

As part of the [Amorim Wine Vision project](#), a network of thought leadership focused on technical and current issues, Fabio Piccoli, Editorial Director of Wine Meridian, provides a deep and stimulating analysis of the future of wine. Piccoli explores crucial topics for the sector: from the boom in

sparkling wines, which are redefining consumption styles, to the challenges of emerging markets like India, where wine education and training are vital to building a strong market.

There are also reflections on the importance of a more inclusive wine language, one that can overcome elitism and engage young consumers, as well as the current overproduction and decline in consumption, which demand a strategic rethink for the sector.

With a perspective focused on the present and future, Piccoli highlights the potential of wine tourism and the personalization of offerings as tools to engage new targets, transforming wine into a true cultural and convivial experience.

This dialogue provides concrete ideas for innovation and growth, in line with the mission of the Amorim Wine Vision project: an observatory that looks at wine not only as a product but as a symbol of culture and quality of life.

Although sparkling wine accounts for only 7% of global production, it represents 20% of the value of wine sales. In the last 20 years, sales value has grown by 5% annually, significantly outpacing still wines (+2%) and fortified wines, which have seen a 2% decline. Has the sparkling wine sector managed to better meet consumer needs and tastes, or has it simply broken out of the confines that once limited it to celebrations?

It is very interesting to analyze the evolution of sparkling wines in the last decade because it highlights the evolution

of wine consumption styles, which have increasingly moved away from daily meals to become more occasional and consumed at various times of the day, especially during aperitifs outside the home. In this direction, sparkling wines have proven to be the type of wine most suited to these new lifestyles and consumption habits.

On the other hand, it should be noted how sparkling wine producers have greatly improved not only the quality of their products but also their communication, becoming the most contemporary brands on the global market. In this regard, Prosecco deserves special mention, as it has undoubtedly been the trailblazer in making sparkling wines accessible to a wider audience, with the now 800 million bottles of Prosecco sold under DOC and DOCG labels speaking volumes.

You were recently in India for the ProWine Mumbai 2024 stop. This massive market is appealing to many, but for Indian consumers, wine takes on different meanings compared to ours. How can Italian companies understand and adapt to the needs and perceptions of a consumer so distant from our market?

India represents an “emerging” market that has been around for decades. Many Asian markets remain emerging for a long time without fully capitalizing on their potential. The main reason for this “slowness” is the lack of wine education, which prevents the product from firmly establishing itself despite the potential of large markets like India and China. For this reason, pre-competitive actions are essential in these markets, such as educational programs for the trade and consumer education. On the one hand, actions need to be implemented by institutions (ministries, ICE agencies,

chambers of commerce, protection consortia, etc.), and on the other, companies need to be present on the market to support their importers' and distributors' branding efforts.

According to the International Organisation of Vine and Wine (OIV), global wine production in 2023 was 7% higher than consumption. The uprooting of vineyards to combat overproduction and address declining consumption is already underway in France, where 27,500 hectares of vineyards, mainly in Bordeaux and Languedoc-Roussillon, will be uprooted by 2025. The debate in Italy is heated. What is your view?

This is a very complex topic, and from my point of view, to make informed decisions, we must distinguish between short-term and structural problems. First of all, if we look at our country, we must remember that in the early 1980s, the area under vine was nearly 1.2 million hectares, and it has now decreased to about 720,000 hectares. Therefore, it cannot be said that in Italy, as well as worldwide, in the last 40 years, efforts have not been made to adapt vineyards to market demands and consumption dynamics.

It is also true that, especially in the last decade, we have witnessed the clear impact of climate change, with significant variability in annual yields. Today, we also face wine consumption declines not seen in the last thirty years, and this must make us reflect, especially in understanding the reasons behind such declines. The most reliable analyses show that there are multiple causes: some are short-term, like the current economic crisis, which affects certain consumer

segments (primarily the young and elderly), while others are more structural, such as the strong health pressures and anti-alcohol campaigns by the World Health Organization.

However, I remain optimistic because we must never forget that wine remains somewhat of a Cinderella among alcoholic beverages. For example, in the U.S. – the world's largest wine consumer – our beloved drink represents only 11% of alcohol consumption. We can still say that over 80% of the global community of potential consumers has never tasted a drop of wine. So, in addition to asking ourselves whether we should uproot vineyards, we should also ask if we can increase consumption or stimulate new consumers.

We have always looked to our French neighbors for their management skills, communication with consumers, and product enhancement. However, the crisis now appears much more severe for the French: in the first half of 2024, France experienced a 10% drop in export value, while Italy closed the semester at +3%, with further growth expected by the end of the year. Rejoicing in others' difficulties is always counterproductive, but this situation needs to be analyzed. What developments do you foresee?

France has always paid more than we have during market crises. We should not forget this, especially because of their ability to focus more on value and positioning. Historically, we have been more flexible than the French, and while this allows us to pay less during market difficulties, it also prevents us

from raising the value of our denominations adequately.

It is crucial to highlight how our extraordinary and unique viticultural biodiversity enables us to better capture market trends than other competitors, and this is why we should also be better at maintaining the value of our wines.

From a perspective, I believe France will always be an essential driver of the global wine sector, especially with its leading denominations (Champagne, Burgundy, Bordeaux), but Italian wine can play a decisive role in helping the world understand the extraordinary link between wine consumption and quality of life. "Made in Italy" still has many values and a tremendous perception worldwide, and our wine productions could capitalize much better on this positive image than we have so far.

In recent years, there has been much talk about customizing wine offerings, from wine clubs to tailored packages and selections. The perception is that these solutions have little appeal in Italy and are mainly targeted at high-spending consumers. What are your thoughts on this?

The theme of customization, wine clubs, and broader wine tourism are the most interesting models for properly valuing wine today. All of this fits into the concept of "wine experience," meaning the desire of consumers not just to consume wine but to experience a territory, enjoy the outdoors, build relationships with producers, find places for relaxation, and have pleasant conviviality. It is no coincidence that wine tourism is growing exponentially in almost every wine region worldwide.

For this reason, it becomes crucial for businesses to take advantage of this trend, becoming more welcoming by professionalizing their wine tourism offerings, increasing direct sales, and building stronger customer loyalty.

What the Anglo-Saxons define as DtC (Direct to Consumer) will be an increasingly determining factor in promoting wine globally and ensuring the economic sustainability of the entire sector.

It is clear that we must offer wine tourism tailored to different target audiences and not exclusively high-spending consumers.

There's much talk about accessible language, a narrative that strays from traditional norms, using evocative names and stories that reflect the daily lives and values of young consumers. However, the reality, both in promotional communication and during events, often still follows very traditional standards. What is your evaluation?

This is perhaps one of the sector's most significant weaknesses globally. The current complex and often non-inclusive language of wine is a relic of a past era, now fortunately far behind, when it was necessary to show that producing quality wine was a highly complex activity. This required a fundamental shift from seeing wine as a "food" product to viewing it as a "cultural" product. This pushed the world of sommeliers and wine critics to develop a language and communication solely focused on describing what is inside the glass, its organoleptic characteristics, and production techniques.

Thus, the perception emerged that the more descriptors one could identify in wine, the more capable one was of approaching it appropriately. This led to a sort of “elite” group of wine enthusiasts (sometimes elitist) and many potential consumers felt intimidated by wine.

For this reason, a strong revolution in wine communication is essential, making it much more inclusive and avoiding the perception that one needs to have taken sommelier courses or completed a WSET master’s to appreciate wine.

As you mentioned in some of your editorials, you believe that “blaming consumers’ lower purchasing power for the current reduction in wine consumption can be a dangerous excuse for our sector.” This is evidenced by the results of the spirits sector, despite price increases. Could you explain the causes behind this situation?

As I’ve mentioned before, I believe there are many reasons for the current decline in wine consumption, and it is very dangerous to attribute it solely to the lower purchasing power of consumers. In fact, I would like to point out that wine is still relatively inexpensive today, and when we compare the price of excellent wine denominations to some of the most popular spirits brands (like Campari and Aperol), we realize how false this perception is. The key issue is therefore how to make wine more appealing, especially to younger generations, the so-called GenZ. To do so, I believe that simpler and more direct communication is crucial, helping people understand that drinking wine is “cool” (as the Americans say), and that it is not necessary to be an expert to appreciate even high-quality wines. Major spirits brands

create very short training programs, just a few hours, to get people interested in cocktails and mixology.

We also need to show that wine is a product of tradition but is also extraordinarily contemporary and not afraid of innovation. If we continue to communicate it as a product of the past, of our ancestral history, it will be hard to see an increase in consumption.

Looking to the future, what trends or changes excite you the most regarding the relationship between consumers and wine? And which, on the other hand, do you think could pose a risk to the sector?

I've already spoken about the growing phenomenon of wine tourism, and I reiterate that I believe this evolution is the clearest proof of wine's appeal and its potential for further growth. Another element to emphasize is how wine remains the most culturally advanced beverage globally. Also, in all countries experiencing growth in democratization and cultural processes, wine is succeeding in establishing itself, proving that it is truly a "sentinel" of cultural evolution, respect for diversity, and civil coexistence. We must never forget the "immaterial" values of wine, as they will always keep it contemporary.

The biggest risk I see is the ongoing difficulty of businesses to invest in marketing and communication. Unfortunately, even today, there is a significant underestimation of the importance of branding, without which it is hard to achieve proper recognition of a business or denomination.

Another limiting factor for the development of our wine sector is the chronic individualism that significantly slows down the potential of many, too many, of our denominations. It's no coincidence that the most solid denominations are those with

the strongest protection consortia, showing territories where producers have understood the strategic importance of teamwork. Unfortunately, these are still too few.

Key points

1. **Over 80% of potential wine consumers have never tasted wine**, highlighting untapped markets.
2. **Emerging markets like India need wine education to foster growth** and solidify consumer bases.
3. **Wine tourism is a crucial tool for engaging new consumers** and offering personalized experiences.
4. **Effective branding and communication are necessary** for wine to appeal to younger generations.
5. **The shift towards sparkling wines and wine tourism** presents new opportunities for the sector.