

Sicilian viticulture, including Italian challenges and opportunities for NoLo wines



SASEV

South African Society for
Enology & Viticulture

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Sicily: a viticultural continent



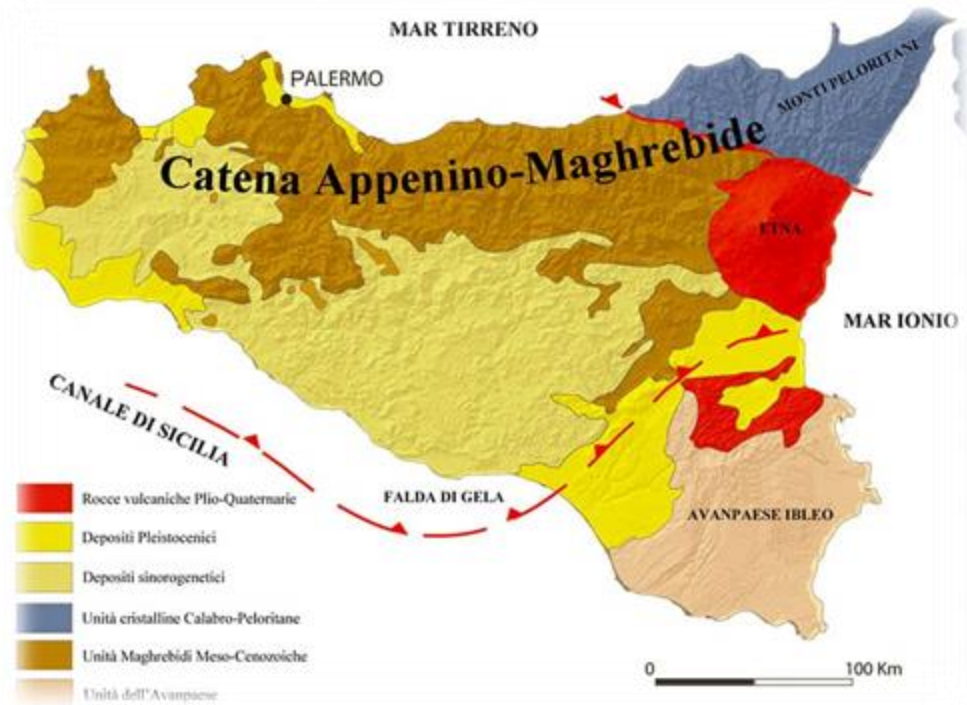
- 25.711 square kilometers
- Largest Mediterranean island
- Strategic geographical position and morphology

Vine domestication and winemaking history



- Bronze Age XXII-VIII bC
- Phoenicians VIII-V bC
- Greeks VII-II bC

Geological origins



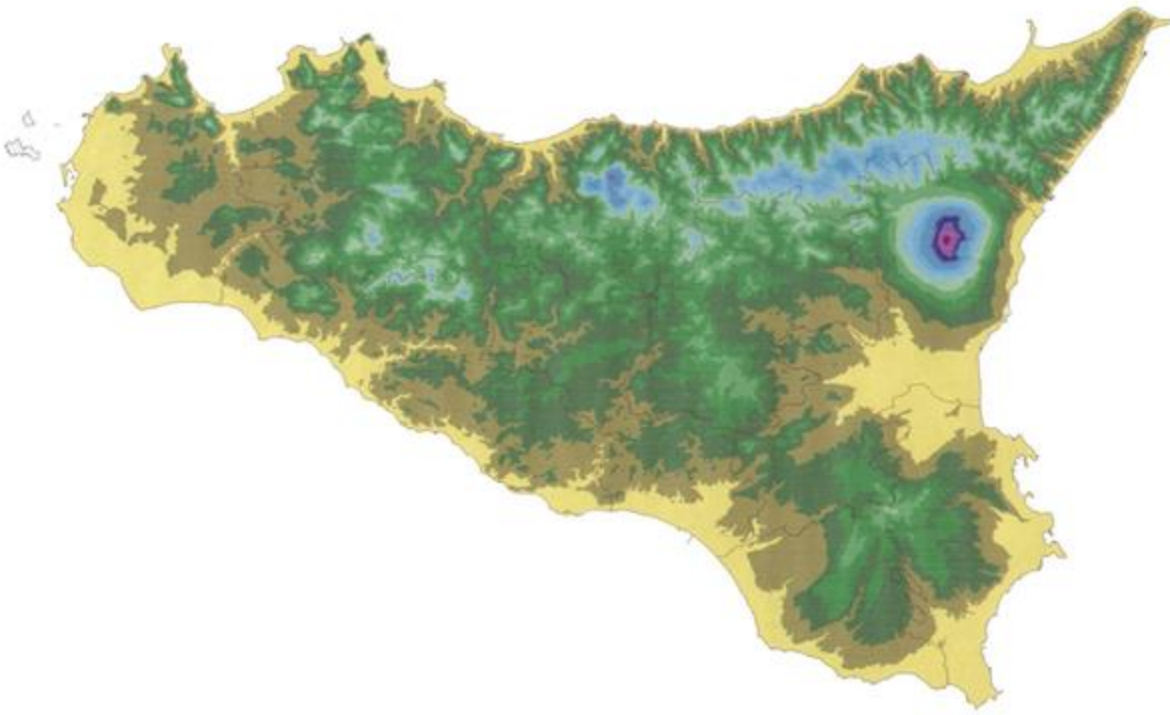
Tectonic activity 60-30 M |

Salinity Crisis 5-6 M |

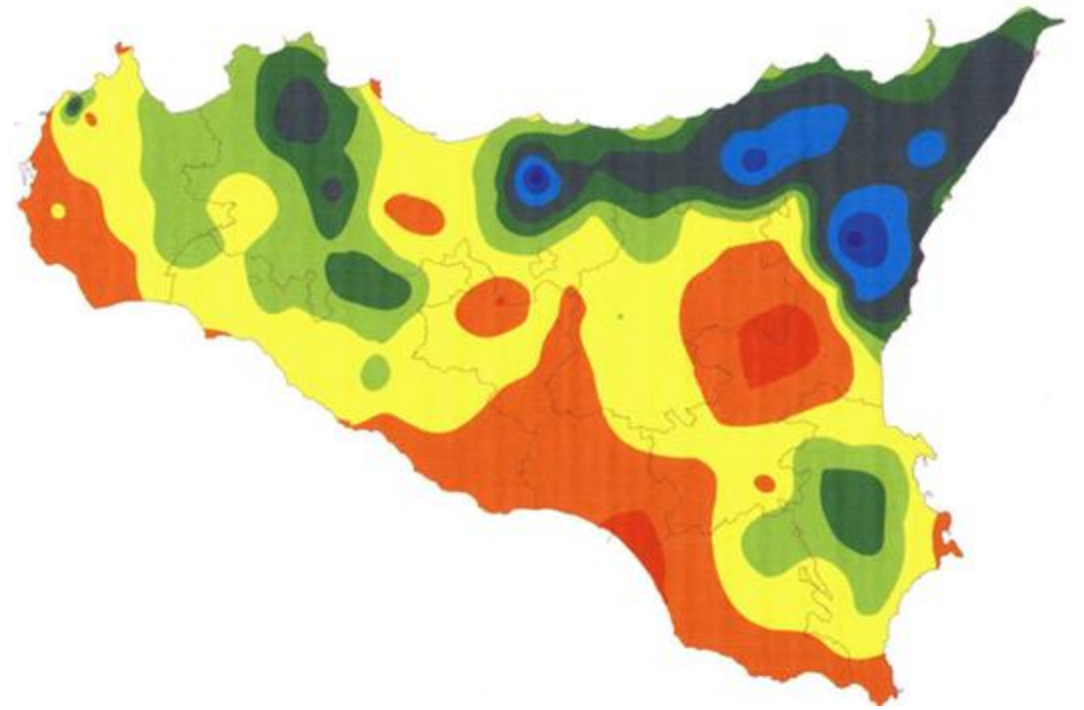
Mt. Etna 700 K

Climate

Temperatures



Rainfalls



Vineyard Surface



25.700 Km²
96.903 HECTARES (2024)

IV



1.220.000 Km²
86.544 HECTARES (2024)

Main viticultural areas and PDOs



Mt. Etna and Etna DOC



Agrigento – Valle dei Templi



Marsala DOC





Marsala DOC

**Europe's southernmost
vineyards**

Aeolian Islands

37th parallel North

Pantelleria



Passito di Pantelleria DOC

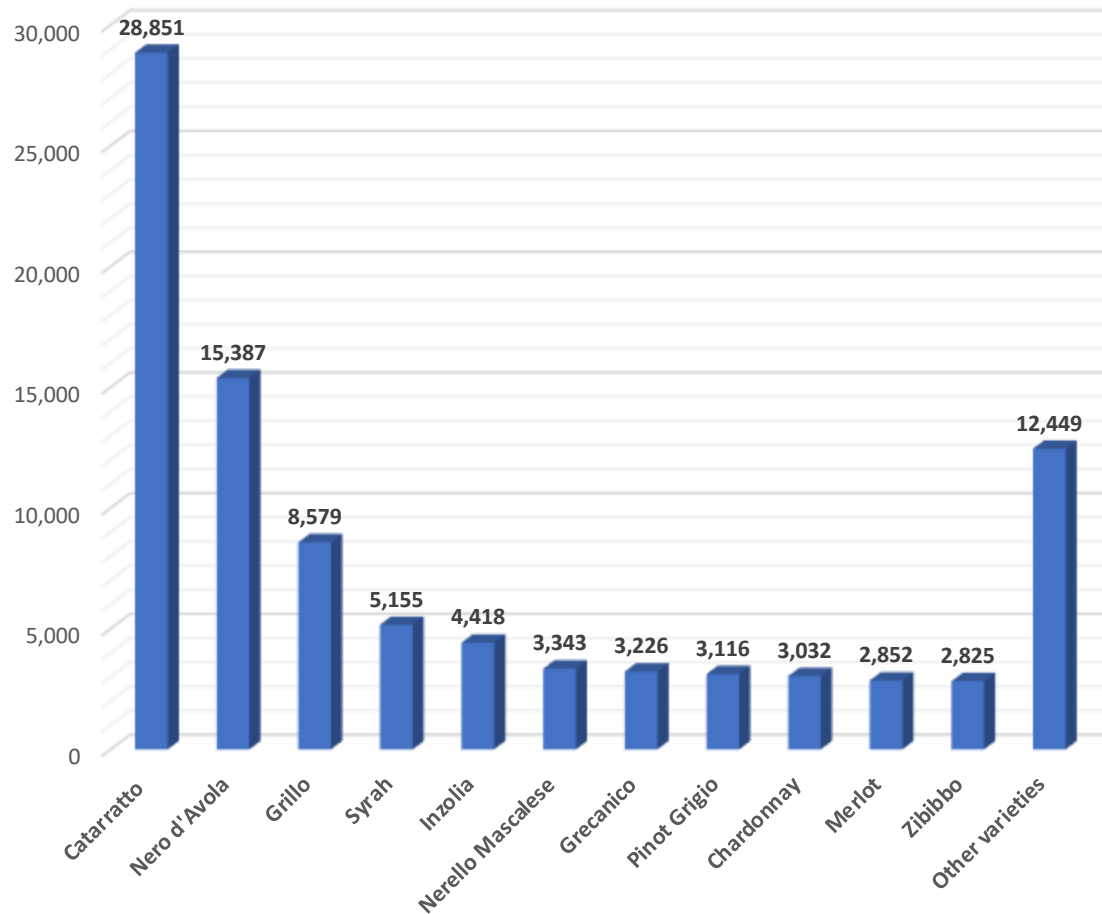


Malvasia delle Lipari DOC



Statistics

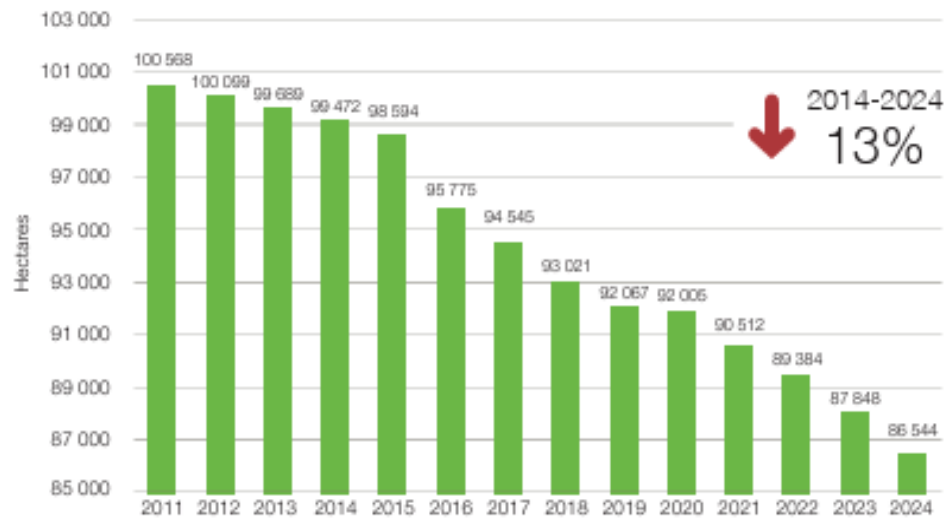
Vineyard Surface (ha)



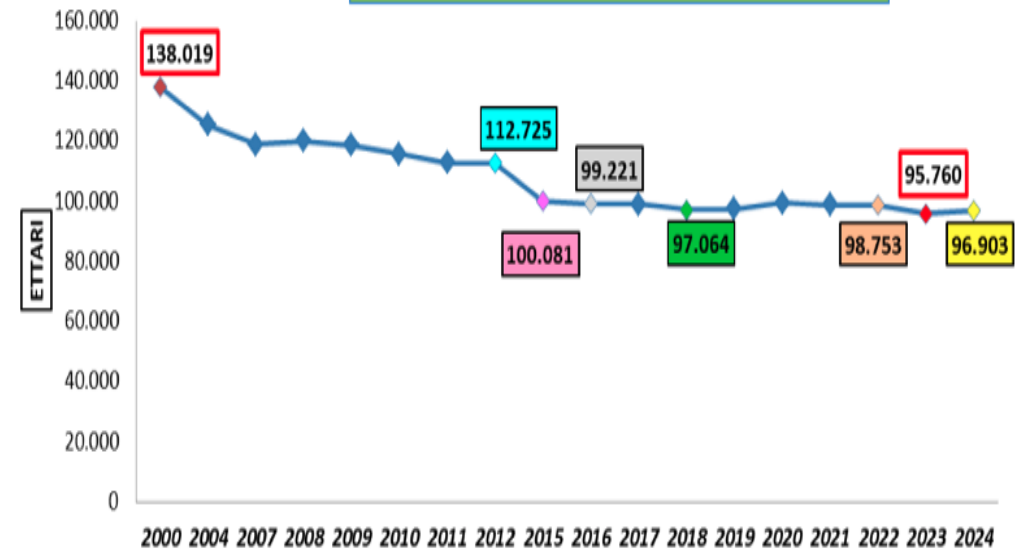
- 2° largest vineyard: 96.903 ha
- 1° Organic vineyard: 37.650 ha
- More than 70 local varieties
- 3 local varieties cover more than 50% of plantings

Evolution of vineyard surface

Total surface planted to wine grape vineyards – industry



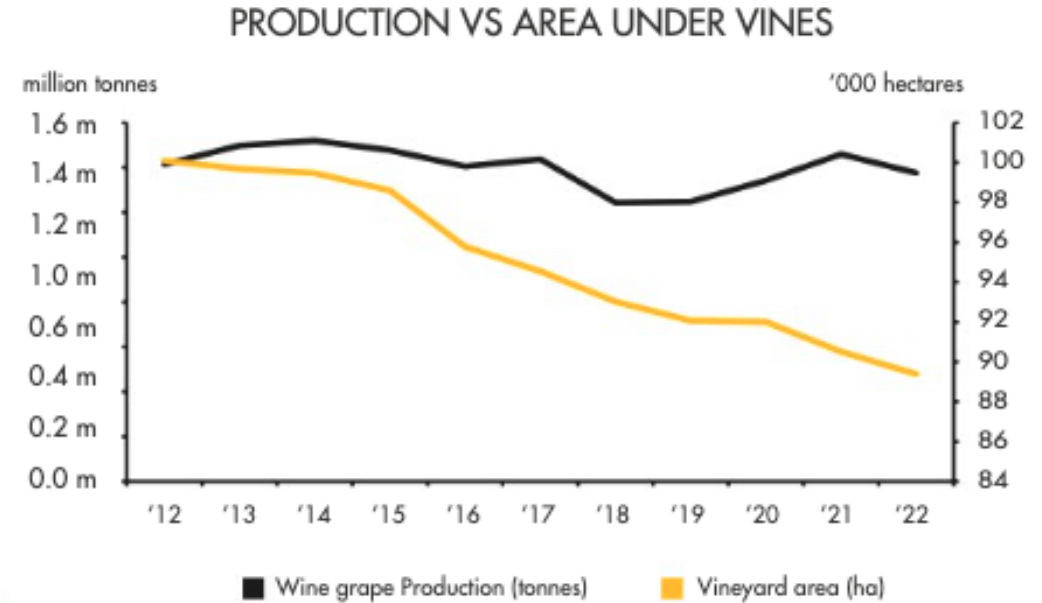
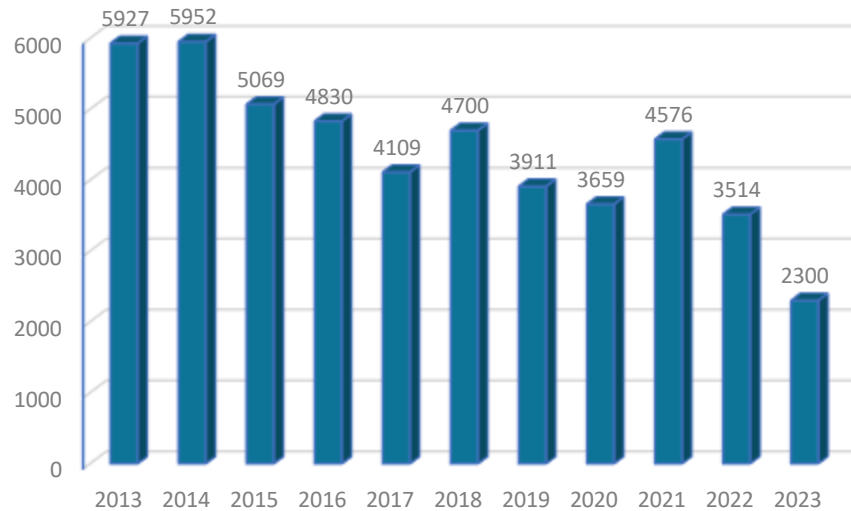
Evoluzione Superficie vitata in Sicilia



- 2014/24 (South Africa and Sicily): similar decreasing trend (-13/14%)
- 2000/24 (Sicily): -30% of vineyard surface (40k Ha)

Statistics: production

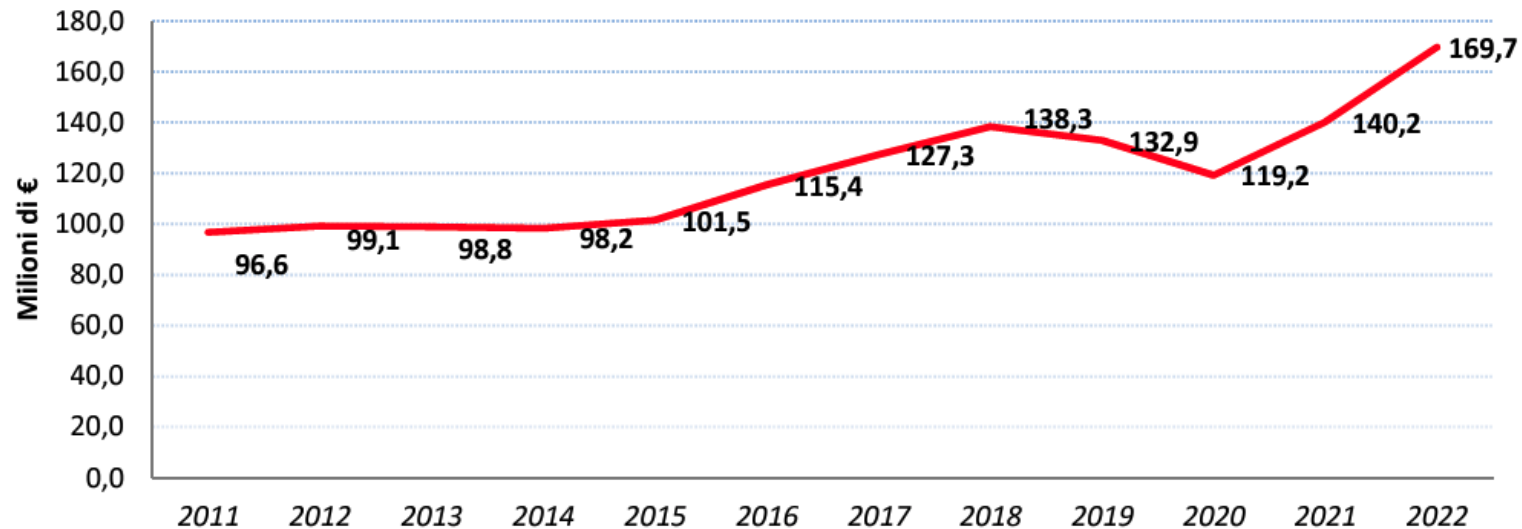
Wine Production (hl x 100)



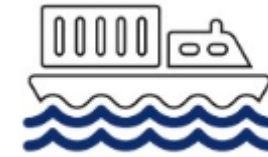
- Sicily vs South Africa: 3,5 M hl vs 9,9 M hl (5 y Avg) → 2,8 M hl in 2024!
- Dramatic impact of weather in recent vintages
- Average Yields: 6,7 T/ha (Sicily) vs 15 T/ha (SA)

Economic sustainability

Evoluzione Valore export vinicolo siciliano



- Profitability 3.826 €/ha/year (R76.520)!
- Consolidating effect on quality and premiumization
- NOLO: is this a sustainable option for regions such as Sicily?



EXPORTS 39% VOLUME

VOLUME
306.3
MILLION LITRES

-17%



VALUE
R10.0 bn
FOB VALUE
+0.9%

LOCAL 61% VOLUME



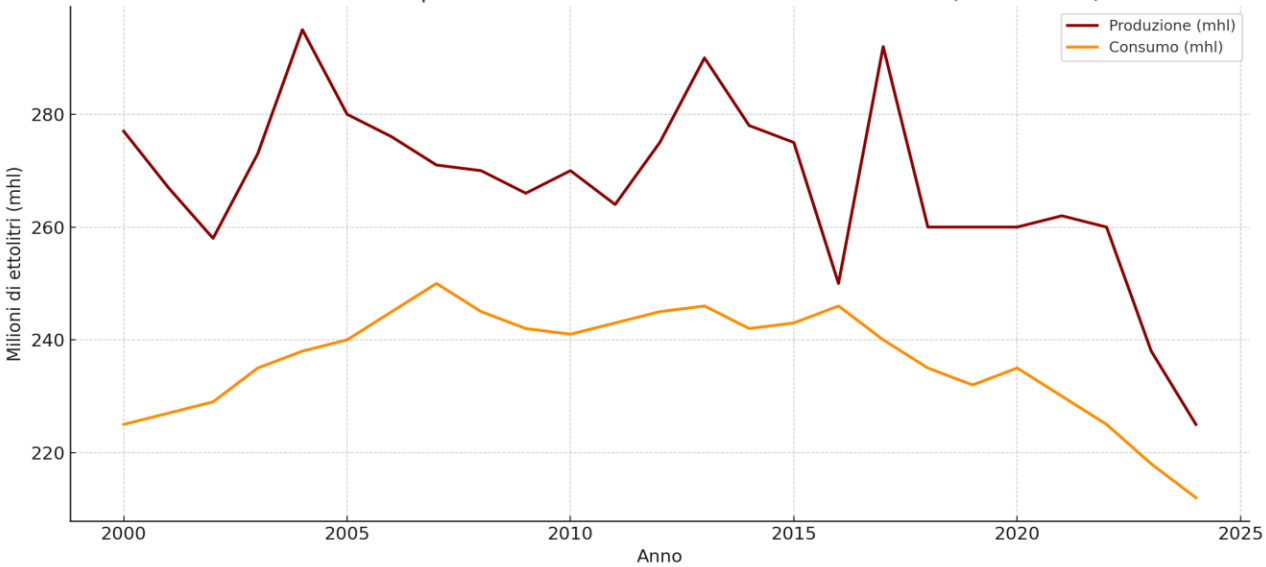
VOLUME
486.4
MILLION LITRES



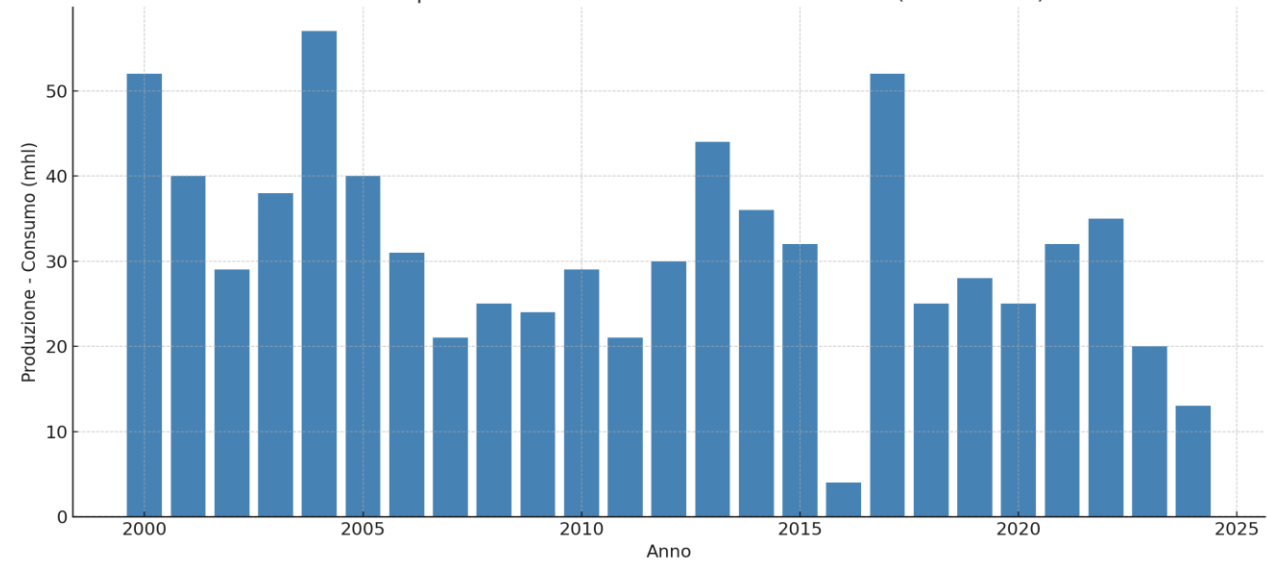
VALUE
R25.6 bn
RETAIL SELLING VALUE
+6.3%

Global wine production and consumption

Evoluzione della produzione e del consumo mondiale di vino (2000-2024)



Scarto tra produzione e consumo mondiale di vino (2000-2024)

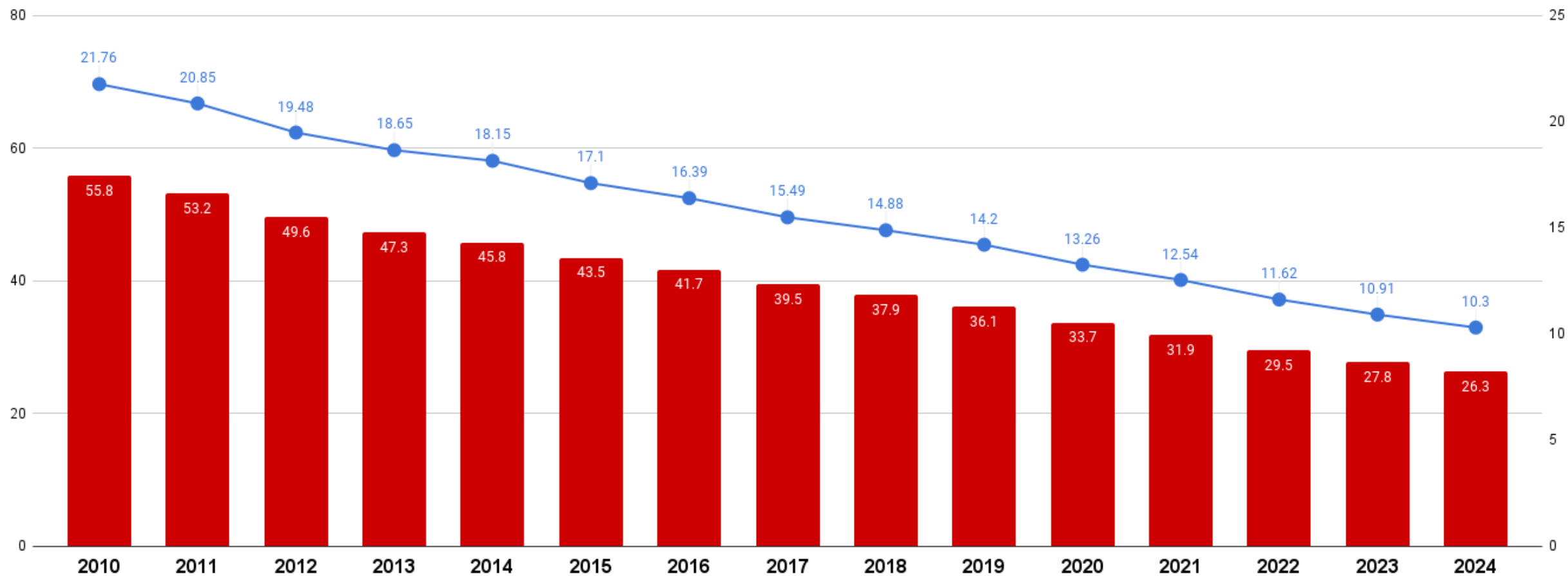


Italian Complexity



Consumo di vino in Italia 2010 - 2024

■ Litri pro capite ● Consumo totale di vino (milioni di ettolitri)



Italian NoLo context

- Alcoholic beverages' volume: -2.7% (2022-25)
- No-low alcohol beverages: +14.8% (2022-25)

- Traditional wine: -3% VS Non-alcoholic wine: +31.3%.
- Spirits: -4.3% VS Alcohol-free versions: +31.1%.
- Beer's : -2.1% VS Non-alcoholic beer: +9.5%.

- The no-/low-alcohol segment accounted for only **0.7% of volume sales in Italy** in 2024 compared to 2.4% in France, 1.9% in the UK and 7.5% in Germany.
- Volume sales in Italy to rise by 2029 : +20.3%

Regulatory Framework

- Partial and Total Dealcoholization allowed in late 2024: Regulation (EU) No 1308/2013.
 - Dealcoholisation must be carried out under the responsibility of a qualified enologist or technician.
 - It is prohibited to add water or exogenous aromas, and to increase the sugar content of the must for wines intended for dealcoholisation.
 - Clear labelling is required: the product must carry the term “dealcoholised” or “partially dealcoholised” next to the category.
 - Exclusion of DOC/IGP wines
- Significant lack of clarity, especially around fiscal rules (excise duties), licensing of dealing with dealcoholisation plants, and timing of formal approval.

Italy's contradiction for NoLo

- Italy at the forefront of new technology development for NoLo.
- Dozens of dealcoholizing equipment ready to be delivered.
- Excess volumes offer to switch potentially for NoLo (?)
- Technical and cost constraints: dealcoholisation processes reduce yield (15% or more) and are energy-intensive, raising production cost and pricing → which regions and products are more suitable?
- Export-driven now means competitive disadvantage

- Now stuck industry, 2026 will showcase the true speed of this trend..

THANK YOU

Pietro Russo
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