



## **Newsletter Italy – September 2025**

We are now past the halfway point of the 2025 grape harvest, and for this reason, we are updating you on the situation in Italy regarding forecasts for quantity, quality, and price trends.

### **QUANTITY**

Similar to what is happening in Spain and France, production estimates in Italy for July and August have also been reduced, although not as significantly. The main cause was the long and intense heatwave in August, which led to lower weight and must yield from early-ripening grapes like Pinot Grigio. This also affected Moscato in the Piedmont region, where the harvest has just finished. The harvest of Trebbiano white grapes began a couple of days ago in Emilia-Romagna and Abruzzo, and the quantity appears to be higher, especially in Abruzzo. I believe the final forecast for Italian production will be around 45 million HL, compared to a 2024 harvest of approximately 43 million.

### **QUALITY**

Overall, I can confirm that the quality of the grapes is excellent almost everywhere. Only in limited areas of Veneto and Friuli-Venezia-Giulia have there been some issues with mold and rot due to frequent rains, resulting in low alcohol content. In Sicily, on the other hand, the vine leafhopper has caused problems in some parts of the island. The harvest of the most important red grapes will begin soon in Tuscany, Piedmont, and Veneto, and fortunately, the weather forecasts for the coming days are excellent.

## PRICES

In recent days, we have noticed a general increase in grape prices, particularly in Puglia. This is due to a strong demand for generic white wines and, in particular, for muted must to produce rectified concentrated must. However, I believe that prices will settle at more moderate levels toward the end of September once this demand is met. Furthermore, with all the current problems in the wine industry – such as falling consumption, “no alcohol” campaigns, American tariffs, and geopolitical tensions – bottlers will be forced to purchase the new wines at the best possible price to be able to sign new contracts with large-scale retailers. Therefore, it is essential to play a great team game without speculating but by looking at the medium to long term to properly support an agricultural sector that is so important for Italy.

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