



GREY'S anatomy

Whether you know it as Pinot Grigio or Pinot Gris, the white grape is a global star. But with some examples being thin and neutral while others offer a glass that oozes class, how are consumers to know what's in store? *Phoebe French* investigates

OF FRENCH origin and later adopted by Italy, Pinot Gris, or Pinot Grigio, is one of the world's most commercially significant and recognised white grape varieties. According to the latest OIV data, worldwide plantings currently total around 57,000 hectares.

In the UK premium on-trade it remains the best-selling white grape variety, according to Liberty Wines' 2018 report,

accounting for 55% of UK wine sales by volume and 44% by value, having more than a 25% market share of the white wine category. More than 75% of the Pinot Grigio consumed in the UK comes from Italy, according to data from the new Pinot Grigio delle Venezie DOC, with the US (37% export share), the UK (27%) and Germany (10%) the top destinations for the wine. But has it been a victim of its

own success? While Pinot Grigio is produced in a wide range of quality levels and styles throughout the world, its dominance in the entry-level price category and the plethora of high-volume, diluted and neutral examples on the market, has coloured its image.

A mutation of red-grape Pinot Noir, the earliest reliable mention of Pinot Gris dates to 1711, according to *Wine Grapes*,

pinot grigio

when it was found growing wild by Johann Seger Ruland, who later gave his name to one of the German terms for the variety – Ruländer. It reached Italy at the start of the 19th century, where it has since been mainly nurtured in the north-eastern corner of the country. Italy now accounts for more than 40% (24,500ha) of the total plantings worldwide, with only 500ha of that total located outside the Pinot Grigio trinity that is Veneto, Friuli and Trentino-Alto Adige.

While the terms Pinot Grigio and Pinot Gris are often used outside of Italy and France to signify the style of wine in the bottle, wines nevertheless range in body from full to light; in flavour from aromatic and spicy to neutral stone fruit; in colour from gold to almost colourless, and in residual sugar levels from lusciously sweet through to dry. It's unsurprising, therefore, that the average consumer might be a little puzzled as to how a £5 bottle may differ from one priced at £15.

Could that be about to change? In 2017, a new Italian DOC – Pinot Grigio delle

certification rising by 73% and bottling by 50%. With measures in place to control the release of new Pinot Grigio wines in accordance with market demand, all wines from the 2017 vintage will be released by the end of December 2018.

"We can now tell the world that we're the benchmark for Italian-style Pinot Grigio," says Armani. "Unlike the rest of the world, we have a historic capacity to improve in terms of style and quality."

IMPROVING QUALITY

He adds that the DOC is keen to improve the quality of Pinot Grigio by working closely with the entire production chain, from vinegrowers through to bottlers and distributors.

"The DOC acts as a control, with the stock having to pass through tasting panels – there are around 60 in the region," Armani says. Additionally, the DOC is working with a selection of academic institutions, such as the University of Padua, the University of Verona and the University of Milan, to

examine and isolate the polyphenols in Pinot Grigio's distinctive pink-skinned grapes.

With 96% of the Pinot Grigio produced within the DOC exported every year, if efforts to improve quality and control production prove successful, the results will be felt by consumers the world over.

Flavio Geretto, Villa Sandi's export area manager for the UK, the US, Americas and Asia Pacific, is adamant that the formation of the

DOC will increase quantity of good-quality Pinot Grigio that is available.

"All quality producers will have to achieve a certain standard that is distinctive from the 'cheap Pinot Grigio' produced in other parts of Italy or in other countries, which takes advantage of the name without confirming the quality elements of the original area," he says.

Massimo Sensi of Sensi Vini agrees, saying "the switch from IGT to DOC within Tre Venezie has brought an additional point of distinction and has guaranteed more credibility" for the Pinot Grigio produced in the north east.

But how is the move seen outside of Italy and will its significance be

Feature findings

- > The new Pinot Grigio delle Venezie DOC has listed improving quality, control of production and better communication with both the trade and media as its top priorities going forward.
- > The DOC is also working with Italian universities on academic research projects in order to better understand the grape.
- > In the UK off-trade, Pinot Gris is growing at the premium end, despite its historic dominance of the entry-level category.
- > Global Pinot Gris producers believe that recognising and exploiting the variety's versatility may be the key to its future success.

'The fact that there is a new DOC demonstrates the consensus among quality-driven winemakers that there is a need to elevate the status of this grape'

Venezie DOC – was established to oversee the wines produced in the Veneto, Friuli and Trentino-Alto Adige. This more tightly controlled production zone will account for as much as 43% (130 million bottles) of Italy's annual Pinot Grigio output of 300m bottles. "From 1 August this year, Pinot Grigio from north-east Italy will no longer be allowed to be bottled and labelled as IGT, and we'll no longer be bottling wines from 2016 and 2017," says Albino Armani, president of the Consorzio delle Venezie DOC.

In July, the new DOC announced that more than 1m hectolitres of Pinot Grigio from the 2017 vintage had been certified by the Consorzio, with requests for

understood? Caroline Brangé, on-trade sales manager at Flint Wines, and formerly a sommelier in London, believes the new DOC will help Pinot Grigio to pick up premium listings in restaurants.

"The fact that there is a new DOC demonstrates the consensus among quality-driven winemakers that there is a need to elevate the status of this grape. There are already talented winemakers working with Pinot Grigio to make wines of character and ageing potential; think of Elizabetta Foradori's Fuoropista and Dario Simsic, for example. However, wineries producing DOC delle Venezie will make a difference in the UK market, and especially in restaurants, where Pinot Grigio is very popular, though quite often disregarded by sommeliers," she says.

James Reed, Italy buyer at Majestic Wines, praised the move, but says it may take time for the news to trickle down to the consumer. "In Italy, showcasing Pinot Grigio's more premium credentials is more difficult," he says. "The new Veneto DOC is seeking to do just that – with a focus on improving quality and bringing out the full character of the grape. This is a message that must land with customers, though, for the perception to shift."

Sean Hutchinson, general sales manager of New Zealand producer Babich, agrees >

pinot grigio



Italy is a production hotbed

with Reed, predicting that it may take time for the impact of the new DOC to be felt in the market. "Over the long term it might boost the reputation of the variety worldwide, but at Babich we think this would mainly be for the benefit of the Italians producing Pinot Grigio," he says.

But Sander Vriend, division manager of Europe at Ste Michelle Wine Estates, believes the average consumer "doesn't understand anything on the label in terms of origin status". He believes the trade bears the responsibility, both for stocking different styles of Pinot Gris and for promoting them to the consumer. In terms of entry-level examples, he says: "People are not buying Pinot Grigio because it's their favourite wine, they're buying it because it's there at that price."

However, more premium examples in the US\$8-US\$15 (£6-£11.70) bracket are benefitting from what he calls "a demographic change in consumers with different buying attitudes".

"Pinot Gris is seeing good development among an audience that is more open-minded; among millennial or certainly younger consumers, it does well," he says. "These people are not Chardonnay and Cabernet consumers; they're not the classical wine drinker. They're younger, with a higher disposable income and are more adventurous. The average consumer doesn't necessarily know many details about the wine they're buying, but they do know what they're willing to spend. It's up to the trade to change this."

While the Pinot Grigio delle Venezie DOC concentrates on improving quality, how is the grape performing in the rest of the world? Reed of Majestic believes that

Trade talk: What does Pinot Grigio need to do to remain relevant in the face of increasing competition from other popular white grape varieties?



Sebastiano Bonomo, export manager, Giusti Wine

"As the Pinot Grigio grape is very popular worldwide, we need to promote its characteristics and its versatility; only in this way will it continue to be so well known. The importance of the brand is crucial for the business and Pinot Grigio has the opportunity to be recognised as a wine brand in itself."



Andrea Nicolini, export director EMEA and Asia, Cavit

"Pinot Grigio has long been relevant to Trentino and Cavit, and our priority is to make sure we continue to produce quality wines across the spectrum – from entry-level up to the pinnacle of what the region can produce. Since Cavit was founded in 1950, we have always ensured we work closely with our family of growers, and share our advancements in viticultural techniques and knowledge with them to ensure access to the best grapes with the best character from the best plots."



Stefano Ferrante, chief winemaker, Zonin1821

"Pinot Grigio should stop being perceived as a 'commodity'. This constituted its success in the past, but it can limit it now. Pinot Grigio has important intrinsic qualities, being a white and red grape together, capable of expressing a remarkable complexity that is difficult for other white varieties to replicate. Therefore, I believe that Pinot Grigio wines should explore a new path, explained and accompanied by dedicated promotional activity that focuses on its inherent quality. More complex and flavourful wines are the key to the success of Pinot Grigio."



Albino Armani, president, Consorzio delle Venezie DOC

"Pinot Grigio needs to maintain a winning style. This is why consumers choose our product and we must not lose consumers who care about it. We'll also work towards improving the quality of Pinot Grigio produced. Working with the grape growers, bottlers and traders, we have a long history of this in Italy and can attract the consumer with competitive pricing. The importance of our work and the way people see it is shown in the fact that the Italian government believes in it, invests in it and helps to promote it. We also need to connect with the media and trade more to promote what we are doing."

'Pinot Gris is seeing good development among an audience that is more open-minded; among millennial or younger consumers, it does well'

while Italian reigns supreme in the entry-level market, the retailer is experiencing premium-end growth in French Pinot Gris. "The entry-level market for Pinot Grigio remains strong, with many consumers drawn to the easy-drinking styles that the grape is ideal for. Italy remains the heartland, although Eastern European nations, such as Romania, also make incredibly good value for money examples, he says. "Where we're seeing real growth is at the more premium end. >



Adam Hazeldine, Babich head winemaker

We've seen a lift in sales from France (largely Alsace and the South West) of almost 30% at Majestic since April."

Outside of Italy, the next-largest concentration of Pinot Gris plantings is in the US (15% of plantings), Germany (10%), Australia (7%), France (5%), and New Zealand and Moldova, both with 4%. Increasingly, though, the rise of products such as gin and fruit wine are putting pressure on entry-level Pinot Grigio, while, as Vriend says, inexpensive wines from California are experiencing a decline in production "owing to the fact that producers will get more money for nuts than grapes at the moment".

Paul Schaafsma, managing director of Benchmark Drinks, adds: "The rise of gin and fruit wine has put pressure on the entry-level 'beverage alcohol' sector, where the majority of switching drinkers sit, hence the pressure on Pinot Grigio's volumes and price point."

Vriend believes that it's important to invest in production areas that proffer

'If Pinot Gris producers continue to focus on delivering complexity, palate weight and interest then the variety should continue to compete'



Majestic's James Reed

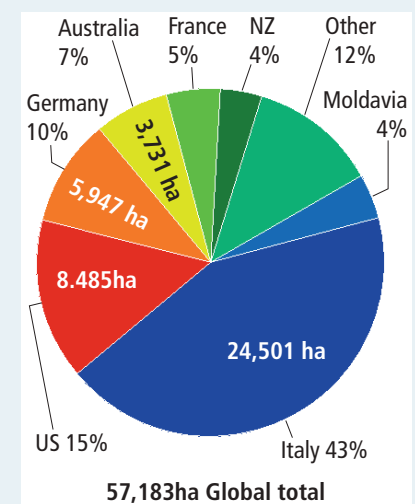
quality and value for money, such as in Washington State, a region in which the wineries owned by the Ste Michelle group make seven out of every 10 bottles produced. While neighbouring Oregon is more commonly associated with top-notch Pinot Gris, Vriend says the higher farming costs in the state mean production prices are almost double that of Washington. He says Washington, which generally produces a Pinot Gris most akin in style to German examples, is experiencing "an upward trend for Pinot Gris", while in Oregon, new planting figures reveal a move towards Chardonnay.

PLAYING TO ITS STRENGTHS

Hutchinson of Babich believes the variety should be playing to its strengths to better fulfil its potential. Sales of New Zealand Pinot Gris in the UK on-trade, in particular, are rising dramatically, with volume sales up by 39% and value sales by 79%, albeit from a small base.

"If Pinot Gris producers continue to focus on delivering complexity, palate weight and interest then the variety should continue to compete," says Hutchinson. "The variety has nice fruit characteristics with some spice for interest. Its drinkability and soft texture make it flexible with most foods and occasions. But it has a natural tendency to over-crop, which creates quite a neutral wine. Consumers don't have insight into whether the wine they are buying is in a neutral style or a fuller, more flavourful style, so it can suffer with a

International Pinot Grigio plantings



Source: Pinot Grigio delle Venezie DOC

lack of style clarity, similar to Riesling in regards to its residual sugar level".

Vriend, comparing consumer sentiment towards the variety to the Cabernet Sauvignon versus Merlot dynamic, says: "There's a huge market for cheaper Merlot, which becomes much smaller for the premium sector. Above £10, Merlot is off the shelf and Cabernet starts dominating. As soon as you go past £10 the market is dominated by Chardonnay and New Zealand Sauvignon Blanc.

"It's up to the trade to change this. Stores should suggest wines based on occasions, such as matching with different cuisines, and do more to indicate sweetness, body and main flavours."

Aside from its affinity with food and ability to be either neutral and inoffensive, or spicy and aromatic, the Pinot Gris grape itself is versatile. Used for sparkling wines around the world, its red skins produce naturally pigmented rosés that have found an audience among a new generation of wine drinkers.

Liberty's consumer research revealed that rosé-drinking millennials are twice as likely as the average consumer to opt for Pinot Grigio rosato, whereas their older counterparts are more likely to favour a rosé from Provence.

The variety has even found favour in England, where a handful of producers

pinot grigio



are exploiting its ability to ripen and develop complexity in cooler temperatures. Sussex producer Fox & Fox planted Pinot Gris in its vineyards in 2005 and 2010. Using Pinot Gris in its Saignée Brut Rosé, it gives the variety prominence in its Blanc de Gris, which co-owner Jonica Fox says was created to pair well with “contemporary cuisines such as street food and spicier dishes”.

Still wine specialists Stopham Estate likens its Pinot Gris to Australian examples, in that it delivers tropical fruit flavours with a medium to full body. While its winemaker and director, Simon Woodhead, says the variety is particularly susceptible to rain, with its thin-skinned grapes, when conditions are favourable, as in 2014 and this year, Pinot Gris has buckets of potential.

Improvements in the quality of Pinot Gris need to be reinforced through better communication with the trade and media.

Andrea Nicolini, export director EMEA & Asia for Cavit, highlights the efforts of producers to improve vineyard management and grape handling. Cavit uses PICA, a vineyard-mapping system it developed to ensure that the best viticultural techniques and picking times for each parcel of land are adhered to. “We don’t just use PICA for our premium wines – we use it for all our wines throughout the quality scale. For us, it’s a

Trade talk: What does Pinot Grigio need to do to remain relevant in the face of increasing competition from other popular white grape varieties?



Massimo Sensi, owner, Sensi Vini

“We at Sensi are working hard to improve the quality level and commercial status of Pinot Grigio. We think that when a grape is so popular, we have to invest to raise its quality level, to make it clearly stand out from all other white grapes and from the Pinot Grigio produced in different countries that aim to take advantage of the name of the original. It is a big challenge, and we trust the new harvest will help us to make Pinot Grigio known for its quality credentials.”



Paolo Lasagni, managing director, Bosco Viticoltori

“To remain such a popular white variety, Pinot Grigio has to further improve its consistency in quality and have a stronger identity. That is the direction the new consortium DOC delle Venezie (the largest Pinot Grigio region in the world) is going towards: higher control, higher quality, and a certification band on all bottles.”



Flavio Geretto, export area manager, Villa Sandi

“From the 2017 harvest, a new domination called DOC delle Venezie was established, and this is a very important link with the production area. The new consortium will have to work hard to inform all the foreign markets about the production area and the typical characteristics of this grape. Education programmes, communication and advertising will be the main ways to confirm Pinot Grigio DOC delle Venezie as the first choice of consumers.”



Sander Vriend, division manager Europe, Ste. Michelle

“The generic quality aspect to a product is important. Very small categories with generic premium goods tend to deliver and translate better to consumers. The on-trade segment must start to offer more Pinot Gris for it to gain more influence. They will get more people drinking it by putting it as a by-the-glass offering. The challenge is never the consumer – it’s the gatekeeper. You must get the gatekeeper to change their habits for Pinot Gris to remain relevant.”

Improvements in the quality of Pinot Gris should be reinforced through better communication, both with the trade and media

key viticultural tool, and thanks to it we can now produce some ‘icon’ wines from Trentino, including Rulendis, a super-premium Pinot Grigio that has an RRP of £19 in the UK,” he says.

Pinot Gris is capable of producing sparkling and rosé wines, while careful handling in old oak barrels can build interest with added texture and weight. The versatility of the variety, therefore, is something that should be exploited by producers to maintain Pinot Gris’ enviable position in the market. db