

# Market Trends of the GIs Wine in the Italian Supermarkets: The Case Study of “Chianti DOCG”

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The wine purchases are growing consistently in the Italian modern grocery shopping: supermarkets account for about 40% of the value of wine purchase of Italian families. In particular, this positive trend concerns the sales of bottled wine (0,75 litre), which have increased their amount both in terms of value (+26,6%) and of volume (+4,8%) in the period 2009-2017. Furthermore, the supermarkets' supply consists of a greater wine variety of different labels and brands.

At the same time, there is evidence of an increasing consumers' interest towards quality products, inducing supermarkets to include on their shelves a greater assortment of wine with Geographical Indication (GI). Indeed, in the period 2009-2017 the supermarkets' sales of PDO (Protected Designation of Origin) and PGI (Protected Geographical Indication) wine are growth by 22.8% and 9.7%, respectively.

To better investigate the performance of GIs wine in the supply of supermarkets and define the main strategies, we analyse the sales (from 2009 to 2017) of the bottles of a specific PDO wine, Chianti DOCG, using IRI Infoscan data. Chianti DOCG is one of the most famous Italian wine GI and the most purchased GI in the supermarkets (the 2.88% of the whole sales in 2017). In the period 2009-2017, the number of labels of Chianti DOCG grew up by 7% and the sales value increased from 37.9 million Euro to 46.2 million Euro (+21.9%). Bottled sales of Chianti DOCG account for 95% of the total sales of this wine.

In our research, we apply some multivariate statics analysis. In particular, we perform a factor analysis on seven explicative indicators: the annual average value of sale; the percentage of bottles not sold in promotion; the average number of different labels sold by each producer; the average price; the percentage of bottles sold with a price higher than Euro 5,00; two explanatory

indicators of the trend of the sales in the considered period, respectively one for the value and one for the price. Furthermore, a hierarchical cluster analysis was applied to the Chianti DOCG producers (213) present in the market at least one year in the above-defined period.

This elaboration allows us to identify five different typologies in terms of sales strategy. Two groups represent, respectively, the producers who have started (20% of the sample) and who have stopped (40%) to sell wine over the considered period. Looking at the producers with a constant presence in the supermarket in the period 2009-2017, it is possible to define some tendencies. One group of producers shows a negative trend in the value of sales and it is characterized by the lowest average sale price and restricted sales value. The rest of the sample can be identified by two different successful strategies. On the one hand, we detect the increase of the sales value (+31% in the defined period) of a group of big producers/bottlers, defined by a large amount of wine sold with medium-low prices. On the other hand, it is possible to identify wineries described by limited volumes in the supermarkets and high price bottles, which shows a growth of 73% in the sales value.

This scenario offers some useful insights for analysing the GI wine market. While supermarkets represent the reasonable distribution channel for big producers/bottlers, at the same time there is room for growth even for small-medium sized quality-oriented producers.

Future research could investigate other Italian wine with GIs to have a wider view of the wine supply in the supermarkets.