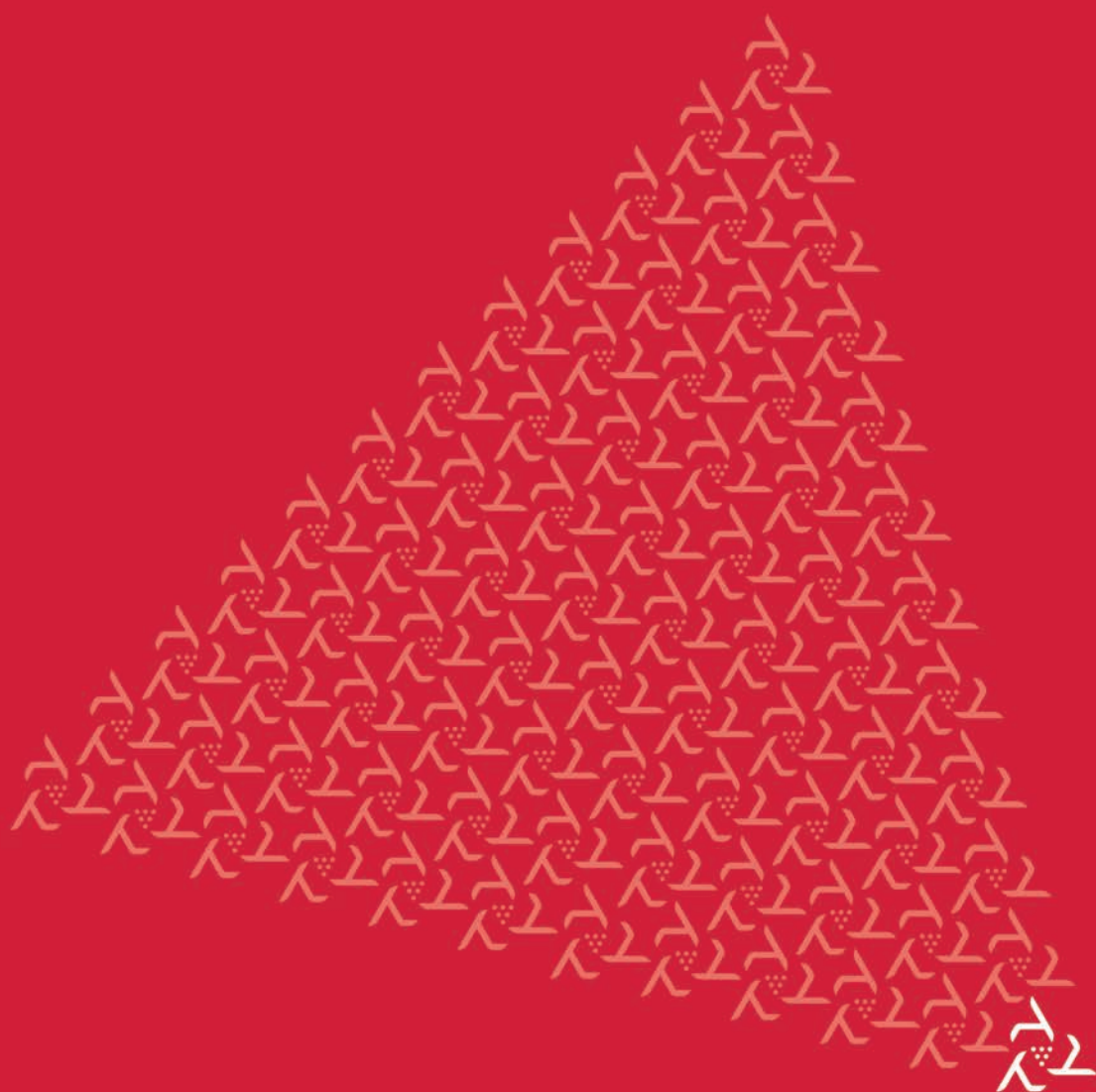


company profile




ASSOVINISICILIA

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Sicilia en Primeur is an important activity designed to promote wine and its area of production and takes the form of an annual travelling event putting Sicily on the front page of the world media. Wine becomes the key with which to interpret the multifaceted nature of the region. Journalists invited to the event are accompanied on a journey to discover the best of Sicily in terms of wine production, artistic and cultural heritage, food and hotel accommodation, returning to a single location afterwards to review the Sicilian wine production sector and the current vintage together with all of the producers. The event helps to promote the Sicily brand throughout the world, promotion that acts as a driving force for the wine sector, and much more besides.



THE ASSOCIATION

ASSOVINI SICILIA



member companies

90



turnover

300+ M/€



Every member has the right to express their opinion: the number of votes is not assigned according to company size.



All members have control over the viticulture and winemaking production chain, from the vineyard to the bottle and aim to produce high-quality wine.



Member companies share a great love of Sicily and the conviction that Sicily and its wines represent a unique value in the world of Italian wine and wines from across the world.



chairman

Alessio Planeta



board of directors

Mariangela Cambria, Laurent Bernard de la Gatinais, Michele Faro, Francesco Ferreri, Lilly Ferro, Federico Lombardo di Monte Iato, Josè Rallo, Alberto Tasca d'Almerita.

THE GOALS

- ✓ Introduce the world, not to mention Italy, to Sicilian wine with all of its unique characteristics
- ✓ Promote viticulture of the highest quality in a mosaic of landscapes
- ✓ Strengthen territorial identity whilst accentuating the distinctive features of the various terroir
- ✓ Unite entrepreneurs in pursuing common goals, starting with product quality
- ✓ Build a wine system recognised by and in liaison with the institutions

THE HISTORY

1998

Diego Planeta, Giacomo Rallo and Lucio Tasca d'Almerita sign the articles of association. A team of small to large-sized wine producers start to share the same goal, that is to say enter various markets, whilst increasing awareness among institutions of the importance of the world of wine.

2004

"Sicilia en Primeur" is established, combining the need to promote the quality of the last harvest and the quality of the next wines that will be ready for sale. For the first few years, this event was held in Palermo. Since 2007, it has toured the whole of Sicily.

2009

Having built up an image in the domestic market, Assovini Sicilia starts to approach the overseas market and organises participation in promotional events abroad. First CMO Promotion in Third Countries.

2011

Chairman Antonio Rallo, co-owner of Donnafugata, a new generation for Assovini. Promotional activities start in EU countries with PSR Sicilia.

2012

Becomes part of the Sicilia Doc promotional committee and contributes to the establishment of the consortium for the protection of Sicilia Doc wines named Consorzio di Tutela Vini Doc Sicilia.

2014

Francesco Ferreri, joint owner of the company named Valle dell'Acate, is elected to the role of chairman.

2015

Assovini Sicilia participates in Expo 2015 as a main partner of the Region of Sicily.

2016

WineinSicily.com, an ONLINE MAGAZINE about wine tourism edited by Assovini, is launched.

2017

The following appointments are made: Chairman Alessio Planeta, Vice Chair Mariangela Cambria and board members Laurent Bernard de la Gatinais, Michele Faro, Francesco Ferreri, Lilly Ferro, Federico Lombardo di Monte Iato, Josè Rallo and Alberto Tasca d'Almerita.

2018

Assovini Sicilia organises Vinitaly 2018 for its member companies.

2019

Assovini Sicilia opens prestigious new premises, property of Assovini itself, the nerve centre of its activities and a driving force for all of the promotional initiatives organised by the association and its members - which, in the meantime, have become 90.

TERRITORY SICILY, A CONTINENT

SICILY IS A WINE GROWING CONTINENT MADE UP OF AREAS WITH DIFFERENT SOIL AND CLIMATE CONDITIONS AND A MOSAIC OF DIVERSE VINEYARDS EMBODYING ITS MULTITUDE OF DENOMINATIONS - 24 TO BE PRECISE.



At 26,000 square kilometres, Sicily is the largest island in the Mediterranean and the largest region of Italy.

The diversity of its landscapes means the whole area is subject to diverse climate conditions: it enjoys a mild Mediterranean climate along its coasts, but the climate changes as you proceed inland or venture up into the mountains, where it is truly continental (the highest mountain is Mount Etna, which is close to 3,400 metres).

The variety of climates is mirrored by the richness of the soils: lava, calcareous, clayey and tuffaceous. Both native and international vines are grown on these soils, representing a regional heritage of unparalleled wealth.

These elements form a powerful combination, enhancing the wines with a multitude of expressions. The harvest extends

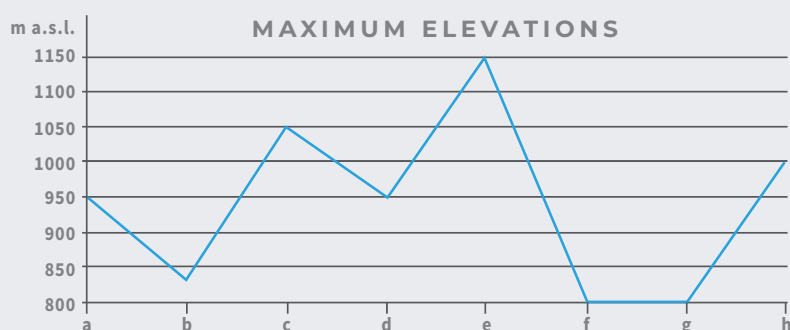
from late July through to November and produces wines with very different characteristics, from the wines of the island of Pantelleria, closer to Africa than to Sicily, to those of the Faro DOC that stretch to the east towards Calabria.

This diversity has been enhanced thanks to the zoning and clonal selection endorsed by Assovini Sicilia and managed at public level by the Region of Sicily. These research projects also aim to identify the best possible combination of vine and terroir, constituting a unique asset and forming the basis of the inestimable wealth of Sicilian wine.

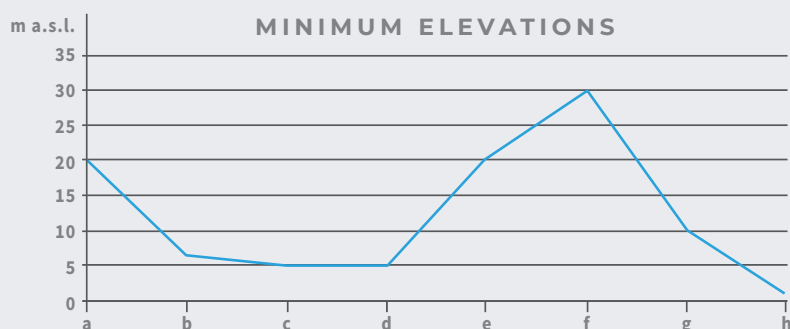
2% Sicily has a Mediterranean climate which is found in just 2% of the world.

VINEYARDS OF ASSOVINI MEMBERS

MAXIMUM ELEVATIONS		
	SITES	m a.s.l.
a	Portella della Ginestra, PA	950
b	Sambuca di Sicilia, AG	830
c	Sampieri, RG	1050
d	Santa Maria di Licodia, CT	950
e	C.da Nave, CT	1150
f	Monte La Guardia, CT	800
g	C.da Santo spirito, CT	800
h	Solicchiata, CT	1000



MINIMUM ELEVATIONS		
	SITES	m a.s.l.
a	Punta Kharace, Pantelleria	20
b	Mozia, TP	7
c	Marsala, TP	5
d	C.da San Nicola, TP	5
e	C.da Belice di Mare, TP	20
f	C.da Buonivini, SR	30
g	C.da San Lorenzo, SR	10
h	Oliveri, ME	1



IN THE VINEYARD AND THE WINERY

With 98,992 hectares of land, Sicily is the biggest wine-growing region in Italy in terms of the amount of land planted with vines, but it ranks fourth in Italy for overall production, with a yield per hectare that is lower than many other regions (the average is about 62 quintals of grapes per hectare, compared to the average of 102 in Italy, ISTAT).

A privileged position - in the middle of the Mediterranean Sea - and the perfect climate - sufficiently varied - make Sicily the perfect region in which to grow grapes with great quality potential.

Sicily is called the "island of sun" because its coastal areas boast the highest number of hours of sunshine per day in Europe - it enjoys 2,500 hours of sunshine a year, against 2,000 in mainland Italy and 1,800 in southern France. Sunlight keeps the plants healthy, making it easier for producers to avoid using pharmaceutical or chemical products in the vineyards.

Here, great wine is above all a great return, the natural expression of a great region through a simple wine making process, with no tricks or elaborate arrangements.

Ancestral knowledge refined from generation to generation that has continued to develop a culture of excellence in our time, partly due to the promotion of traditional native varieties.

In fact, for nearly 20 years now, public and private bodies in Sicily have contributed to a large and complex project of experimentation and research on native varieties. The project, which is producing interesting results, also involves some varieties known as "relics", so-called because they are in danger of extinction. Launched in 2003 with the title "Promotion of native Sicilian vines", the project aims to recover, protect and promote Sicilian ampelographic heritage in all its complexity. Sicily remains one of the few pools of European wine growing diversity where it is possible to find many vines that have not been seen or heard of for years, in addition to the parents and ancestors of varieties currently grown in far away places.

To date, more than 60 varieties are grown in Sicily, about twenty of which are native. Among the main autochthonous red grapes are Nero d'Avola, Nerello Mascalese, Frappato, Nerello Cappuccio and Perricone. Among the main autochthonous white grapes are Catarratto, Grillo, Inzolia, Grecanico, Zibibbo, Moscato bianco, Carricante and Malvasia. Nero d'Avola is now famous all over the world, whilst Grillo is the best-known native white grape variety: in 2017, it was the top Italian variety, with a 23% growth in bottles sold.

OVERVIEW

THE MARKET

900+

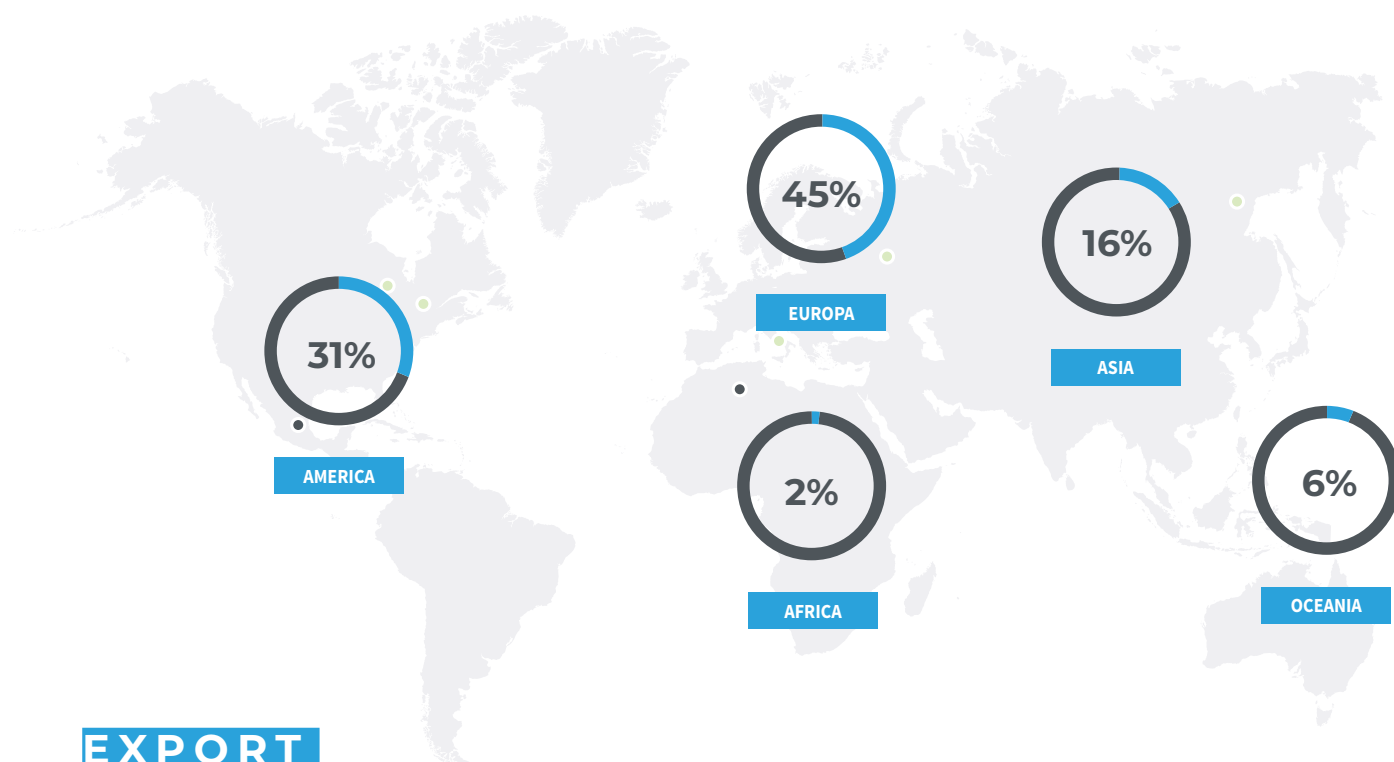
Different wines produced by the member companies.

95%

Companies produce controlled designation of origin (DOC) wines.

50%

Export trade accounts for 50% of the sales.



EXPORT

Assovini Sicilia is an association of 90 Sicilian wine growing and producing companies with three elements in common: total control of the wine growing and wine making production chain, from the vineyard to the bottle, the production of high-quality bottled wines and an international view of the market.

In total, member companies produce around 900 different wines. 95% of the companies produce controlled designation of origin (DOC) wines. Export trade accounts for 50% of the sales. Wine is exported to many markets: some companies export their products to over 100 countries. Traditional markets such as Germany, Switzerland, England, Japan, the USA, Canada and Russia are now joined by emerging markets such as Brazil, China, South Korea and South East Asia.

The European market is a natural outlet for Assovini producers: even excluding sales in Italy, Europe remains the leading market accounting for 45% of sales, whilst the American continent accounts for 31% of our wine sales. Germany is the primary outlet in Europe, whilst outside Europe the United States buys a large proportion of the Sicilian production.

On the other hand, concrete opportunities are beginning to emerge from Asia and the inclination to export to these countries continues to increase. To date, Asia is the third largest market accounting for 16% of sales. Oceania and Africa are respectively in fourth and fifth place, with 6% and 2%.

OVERVIEW

WINE

TOURISM

The success of incoming tourism, in constant growth over recent years, has led to the growth of tourism in the wineries. Companies belonging to Assovinis Sicilia welcomed over 195,000 visitors in 2018. Visits from foreign tourists are increasing: to date, international tourists account for 58% of the total visits. These tourists come from, in descending order, the United States, Germany, the United Kingdom, Sweden and France.

The trend towards tourism in Sicily continues to grow and high quality wine has created a winning combination for promoting the region and attracting visitors to discover its beauty, history and people. Members have two roles: travel throughout the world to raise awareness of the Sicilia brand and take on the challenge of providing hospitality in the region. Indeed, the link between wine and tourism has prompted companies to invest in

buildings, routes and events.

94% of the wineries offer visitor spaces, 40% offer hotel rooms and 69% offer restaurant services. In the last 5 years, Assovinis Sicilia companies have recorded an increase in visitors of more than 30%. The wine and regional tourism offered is promoted through various channels: first of all through agreements with tour operators, but also, in order of importance, the company website, social media, and specialised search portals such as Booking.com or Tripadvisor.com.

Initiatives like Cantine Aperte or Calici di Stelle, promoted by the Movimento Turismo del Vino association, supported by most of the members, aim to increase the focus on wine. This demonstrates the value of the work carried out by Sicilian wineries in promoting and enhancing the uniqueness of their wine.




STRUCTURES

195.000
TOURISTS
in 2018



58%
international
tourists

40%
WINERIES
offering accommodations



69%
WINERIES
offering restaurant
services



HOSPITALITY

TREND OF TOURISM IN SICILY

The success of incoming tourism, in constant growth over recent years, has led to the growth of tourism in the wineries.

+30%
increase in visitors
in the last 5 years

94%
WINERIES
offering visitor spaces

OUR COMMITMENT

ASSOVINI GREEN



Respect for the environment is the stylistic vein characterising Sicilian viticulture, primarily due to the natural role played by vineyards in protecting the environment from erosion and overbuilding. The vineyards of Etna or on the island of Pantelleria are good examples, where the terraced vineyards in which more than 1,000 hours of manual labour per hectare are used - that is about 3 times the amount of hours needed for a hillside vineyard - represent an important way to protect suitable and constitutionally fragile lands from abandonment. The strong focus on the environment can also be attributed to the adoption of increasingly eco-friendly cultivation practices, assisted by the favourable climate. In fact, Sicily is heavily focused on organic cultivation and practices that reduce reliance on plant protection products and eliminate chemical weed control. The amount of land dedicated to organic vineyards on the island, or in the process of conversion - equal to 38,935 ha. - puts it in first place among the Italian regions. This data indicates that almost 40% of the land planted with vines on the island are

IT ALSO BOASTS ONE OF THE HIGHEST USAGE RATES FOR INTEGRATED AND GUIDED PEST CONTROL, WHICH HAS BEEN ADOPTED BY ASSOVINI PRODUCERS IN CLOSE TO 70% OF THE VINEYARD AREAS.

cultivated using Italian organic methods. In addition, more than half of Assovini Sicilia companies have achieved organic certification.

These methods allow winegrowers to intervene only in case of need, focusing on prevention and reducing reliance on plant protection products, favouring natural solutions wherever possible. Sustainable agronomic choices also affect business management choices. For example, 50% of the members use clean energy production systems, especially photovoltaic and/or solar-thermal systems and this percentage is destined to increase as many members have declared that they have embarked on construction projects for photovoltaic panels. Furthermore, some producers purchase energy from operators that supply energy from renewable sources. Most members possess environmental certifications, but there are also many voluntary projects designed to improve

sustainability. Every company seeks its own way: for example, some wineries have obtained the "SOStain" certification, other companies are working towards it, whilst some wineries have obtained Carbon Footprint or Carbon Neutral certifications.

Quite a few companies have decided to reduce the weight of the bottles by adopting thinner and lighter types of glass.

Sustainability is also expressed through varietal biodiversity. The association's wineries grow over 50 different varieties. These include some native experimental varieties that represent a regional heritage that is still largely unexplored. For this reason, about one third of the members conduct experiments in the vineyard, 86% of which involve native varieties. Some members grow more than 20 native varieties, including authorised and experimental ones

OUR COMMITMENT

ORGANISATIONAL CLIMATE AND CULTURE

Sicilian wine-growing and producing companies boast a unique organisational model thanks to the quality of the working environment. They are generally small or small to medium size companies, all family owned, where the relationship of trust between employees and owners forms the basis of the business routine. Employees are proud to work for the company and the sociable nature of wine itself helps to create a favourable climate both between colleagues and across hierarchies. Participation in trade fairs, numerous events, dinners and tastings are often transformed into important opportunities to strengthen relationships. Furthermore, more than 60% of the companies invest in specialisation courses for their employees (for example language, culture, wine tasting and information technology courses), 70% regularly organise fun team building activities with employees and 65% of the businesses see

festivities as a good opportunity to offer employees a gift. The work environments are friendly and welcoming and often have a kitchen and/or canteen.

Female presence in the workforce is valued. More than 50% of the top jobs are filled by women, in positions of leadership with important decision-making roles. In addition, 12 of those are members of the Donne del Vino (Women of Wine) association who play active roles in the regional association, including the role of Chairperson.

As a result, these companies are often considered among the most outstanding workplaces in Sicily and some of the best environments in which to aspire to work.



SICILY, LAND OF WINE: PLEASURE ACROSS THE CENTURIES

Some fossil seeds found at the foot of Mount Etna and in the Aeolian Islands appear to prove that vines grew spontaneously in Sicily, even before the appearance of man on Earth. However, the Greeks are said to have introduced new vines and improved cultivation techniques. After a few centuries in which the peninsula was raided by the barbarian invasions, vine growing resumed in Sicily during the Arab domination (827 - 1091), for the sole purpose of producing grapes, not wine, the consumption of which is forbidden by the Muslim religion.

In the eighteenth century, an English merchant named John Woodhouse sent a few barrels of Marsala wine from Sicily to Liverpool, to which he had added alcohol for the purpose of preservation. Sicilian fortified wine became very popular in England and those shipments continued for years.

In 1870, when phylloxera devastated the French vineyards, Sicily benefited from an increased demand for wine and in a short space of time the amount of land planted with vines in Sicily had tripled. But

then, just 10 years later, phylloxera also appeared in Sicily and destroyed much of its wine growing heritage. Replanting took a long time, but Sicily re-emerged from the ashes ready to start afresh with a strong focus on high quality production. Sicilian winemaking returned to the forefront in the seventies of the last century, concentrating first on experimenting with international grape varieties and then on rediscovering its own identity and promoting the most interesting autochthonous varieties.



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