

The magnitude and nature of the COVID-19 shock has quickly spilled over to the global economy, triggering a dramatic decline in economic activity, due both to social distancing practices but also due to government-mandated lockdowns and other mobility restrictions. The economic impact in Italy has been severe and highly differentiated among industries and firms, hitting more services than manufacturing. The agri-food sector remained operational across the supply chain in order to feed the people and it has followed, in 2020, a positive trend in retail sales, in contrast to that one of the other retail sectors. In particular the pandemic had disruptive effects on the wine sector. In Italy, the Ho.Re.Ca stoppage generated estimated losses of over 1 billion euros. Therefore, the growth in retail sales (+7,7%) only partially offset the losses in non-domestic consumption. On the export side, the impacts have been quite limited (-3,4%), especially compared with France and Spain, but extremely diverse among the exporting companies. The drastic decline in wine tourism and logistical difficulties for the grape harvest have represented other two challenging aspects for the wine producers. The repercussions of the crisis on wine producers varied among the operators, indeed small wineries have been more affected than large and structured ones.

European commission and national governments adopted exceptional measures to support the wine sector. The main measures implemented in Italy include the crisis distillation and the support for yields reduction, this dissertation provides an overview and an analysis for both of them. These evaluations take on greater importance since, in the near future, new public interventions will be probably required.

Finally, the short and long-term effects on the wine sector will be discussed. The changes about distribution channels: e-commerce and supermarket sales have risen during the lockdown, while the crisis has been an accelerant of an existing trend regard the first dynamics, about the second the shelves of food retailers could represent a new opportunity for many premium wines. Furthermore, the sudden collapse of important sales channels and export markets is likely to result in wine producers having to diversify across these ones in order to spread risk more effectively. The last relevant aspect is about digitisation and how it will play an increasingly important role in the future.

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