

**Local indigenous grape varieties:  
a success story in the European and global market**

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# Worldwide overview on indigenous grapes

- **Europe** several hundred varieties (see below)
- **Africa (S/N)** 5-10 different varieties (Pinotage etc.)
- **America (S/N)** ~ 5 such varieties (Sereza, Griolla, etc.)
- **Orient/ex-Russia** ~ 15 minor varieties (Rkatziteli, Tsolikouri, Saperavi, etc.)
- **Asia** none
- **Australia/New Zealand** none

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→ Europe is the market leader with indigenous grape varieties and thus defines the source of the decision, what variety becomes market relevant

## Europe's country share in indigenous grape varieties

- Portugal ~ 280
- Georgia ~ 200
- Spain ~ 80
- Greece ~ 65
- Italy ~ 60
- Switzerland ~ 40
- France ~ 25
- Austria 15 - 20
- Croatia 15+
- Cyprus 15+
- Balkan states (RO, BG, H, etc.) ~ 25

(restricted to the officially identified and released grape varieties)

# Market advantages vs. disadvantages of indigenous grape varieties (1)

## 1. Advantages

- typicity of the terroir is key factor
- winemaker can best handle the local typicity
- all seasonal aspects are best promoted in those products
- local indigenous varieties guarantee better adaptation to rapid changes of terroir
- local winemakers, dealers, distributors, sommeliers, restaurant owners etc. identify themselves more with their local products

# Market advantages vs. disadvantages of indigenous grape varieties (2)

## 1. Advantages (cont.)

- surprising factor for tourists/visitors, who get acquainted with these grape varieties ("never expected something like that!")
- they carry home bottles and praise the new detection (= best reputation!)
- distinction/"be different" from well-known and established international grape varieties gives chances for new and other successful markets (we don't want so many uniform wines!)
- small harvest resp. production quantities create special demands

# Market advantages vs. disadvantages of indigenous grape varieties (3)

## 1. Advantages (cont.)

- quality aspects can be treated better
- local wine market competition is turned on
- large potential for actual and additional grape varieties to slowly penetrate local or global markets by experience
- tradition and local habits support the specific type of indigenous grapes and that's the image setting

# Market advantages vs. disadvantages of indigenous grape varieties (4)

## 2. Disadvantages

- indigenous grape varieties need a well defined and detailed market introduction outside their origin (big effort!)
- well-known international grape varieties cover the global market and there are only small slots left for hundreds of other varieties (no competition, just extrusion!)
- the market demands a perfect quality vs. price ratio
- the difficult pronunciation and spelling of various grape varieties is a blocking factor for some consumers

# Market advantages vs. disadvantages of indigenous grape varieties (5)

## 2. Disadvantages (cont.)

- customers need to know, what this grape variety is comparative to and fits to what occasion, because their consumption is very different than the producer's side
- permanent presence, constant quality and competition on the international market is a must, but hard
- consumers want to associate grape name and origin (region, country, producer etc.)

## Conclusions

- Indigenous grape varieties have their place in the local as well as global market in Europe and the rest of the world
- Smaller wine producing countries should stand with their capacity and power in the indigenous grapes, because that is their uniqueness
- Don't try to compete with international grape varieties, because their market is already resp. more or less occupied
- Wine producers of those wines must personally present their products in the potential local markets
- Observation of market trends and consumer groups is essential

**Thank you for your kind attention!**