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Italian consumers show a stronger appetite for sustainable wine, Nomisma study finds

The study found 18% expect to increase purchases within 12 months, giving producers more room to defend prices on certified bottles

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Italian consumers are showing a stronger appetite for sustainable wine and a greater willingness to pay more for it, according to the latest Wine Monitor study by Nomisma, prepared with Valoritalia and released on Tuesday, November 10.

The research suggests that sustainability has become a more important factor in food purchases in Italy, even though price still leads buying decisions. Nomisma found that 83% of respondents cited price as an important criterion when choosing food products, followed by Italian origin at 74% and sustainability at 68%. The weight given to sustainability has risen by 13 percentage points since 2020.

In wine, the shift appears to be gaining ground. Nomisma said 12% of consumers now buy sustainable wine, up 2 percentage points from 2025. It also found that 27% of consumers check labels for an organic or sustainable logo when making a purchase.

That matters for the wine business because it points to a consumer base that is changing not only in values but also in spending behavior. Producers and distributors may have more room to defend prices on certified labels and to invest in sustainability credentials, while weaker performance in some lower-tier categories could push parts of the sector to reassess pricing, certification and product mix.

Nomisma said 18% of respondents expect to increase their purchases of sustainable wine within 12 months, while 5% expect to reduce them. The study also found that resistance to higher prices has eased. About 9% of respondents said they would be willing to spend 10% more for a sustainable wine. Another 36% said they would pay more, but not above 10%, and 31% said they would accept a premium of as much as 5%. One group, equal to 25% of those surveyed, said it would not pay anything extra.

Denis Pantini, Nomisma analyst and author of the study, said consumer attention to sustainability remains high in an uncertain wine market and extends beyond the bottle itself to the producer and the area where the wine is made. The same interest also reaches wine tourism, where two out of three Italians consider sustainability important when choosing a vacation destination, according to the study.

Consumers’ idea of a sustainable wine is tied first to vineyard practices. Nomisma said buyers place value on the absence of herbicides and limits on the use of crop protection chemicals. But the survey also found that attention does not stop at farming methods. Respondents also consider it important that wineries reduce waste, cut energy use and lower water consumption.

The backdrop to those findings is a market that remains under pressure in volume terms. Valoritalia, which certifies wines with protected denominations of origin, reported that bottled wine volumes in Italy fell 3% year over year in January through September 2026 to 9.86 million hectoliters.

The decline was not evenly spread across categories. DOC wines limited their drop to 0.5%, while DOCG wines were down 0.2%, and both categories returned to growth in the third quarter, according to the data cited in the study. IGT wines, by contrast, showed a much sharper decline, down 13% in the first nine months of 2026. In July through September, the fall in IGT bottlings widened to 18.9%.

Those figures suggest that demand is holding up better for wines with stronger quality positioning and clearer guarantees of origin, while weakness is more visible at the base of the quality pyramid. For beverage companies tied to wine, that pattern could influence how they manage entry-level and mid-tier portfolios, especially if consumers continue to reward labels that combine perceived quality with environmental claims.

The study also points to a growing role for Italy’s wine protection consortia, which represent and defend appellations. Nomisma said consumers see those bodies as reliable and credible. Their role is expected to expand further under EU Regulation 2024/1143, which gives them responsibility for promoting and coordinating initiatives to improve the environmental, social and economic performance of wine supply chains.

Under that framework, consortia can agree on sustainable practices, including standards that go beyond existing legal requirements, and encourage producers to adopt them. If those practices become mandatory for all producers in a denomination, they must be incorporated into the production rules. The regulation also allows consortia to prepare and update voluntary sustainability reports based on verifiable information and to carry out information, training and awareness activities.

According to the survey, all consortia involved have either already started or plan to start, within 12 months, a coordination process with local stakeholders such as public authorities and tourism operators. They see themselves as coordination hubs in those efforts. Among the actions considered most important for inclusion in production rules are environmental measures covering plant health, soil and biodiversity, along with ethical codes and initiatives aimed at employment and local development.