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Italian independent winegrowers call for broad talks on restaurant wine markups

FIVI says nearly 50% of members' revenue comes from hospitality, so lower prices alone will not revive demand

Sunday, November 22, 2026



Italian independent winegrowers are calling for a broad industry discussion on restaurant wine pricing, arguing that lower markups alone will not solve weaker consumption but that the issue has become too important to ignore.

In an interview published Saturday, November 21, Rita Babini, president of FIVI, the Italian Federation of Independent Winegrowers, said producers, distributors and restaurant operators need to work together on pricing and margins across the supply chain. Her comments came as FIVI's wine market fair returned to Bologna from Saturday, November 21, through Monday, November 23, bringing together more than 1,000 producers for its 15th edition.

Babini said the wine sector is operating in a difficult environment shaped by higher production costs, geopolitical instability and more cautious consumer spending. She said independent growers have felt the increase in raw material costs at every stage of production, from agricultural inputs to packaging, while the final shelf or wine-list price is also affected by distribution and retail markups.

"The issue is complex and should not be approached simplistically," Babini said, according to the interview. She argued that the restaurant trade is too important to producers for the debate to be reduced to a dispute over whether wine markups are too high. Babini said nearly 50% of independent growers' commercial outlets are tied to the Horeca channel, the hospitality segment that includes hotels, restaurants and cafes.

That makes the question especially important for the beverage business more broadly. For small wineries, restaurant sales are a major route to market, and the final price paid by diners can shape both demand and the income that reaches producers. If wine becomes harder to afford in restaurants, that may weigh on sales in a channel that remains central to the visibility and financial health of many smaller brands.

Babini said it is in the interest of the entire supply chain to make sure consumers are "in the best conditions" to discover, appreciate and buy wine. Asked whether restaurants should reconsider pricing policies, especially on lower- and mid-priced bottles, at a time when diners are spending more carefully, she again rejected a one-size-fits-all answer.

She said markups in restaurants, wine shops and wine bars depend on local conditions, including rent, labor costs, customer base and the structure of the market, which can vary sharply from one city to another and even more between urban and provincial areas. For that reason, she said, there is probably no universally "right" markup.

Instead, she called for what she described as a 360-degree discussion involving all parts of the supply chain to find solutions that can help revive consumption and expand demand.

The remarks reflect a wider concern in Italy’s wine trade over the relationship between final prices and slowing demand. Independent producers are particularly exposed because they often operate on a smaller scale and rely heavily on specialized distribution, direct sales and hospitality venues to position their wines.

Babini also said FIVI has recently gained stronger institutional recognition. She pointed to the inclusion of a representative of independent winegrowers in Italy’s National Committee for PDO and PGI Wines, a body that helps shape sector policy. She described the move as the first time Italian law has formally recognized the category of independent winegrowers, which FIVI has long sought.

According to Babini, the organization now expects a change to the formal appointment decree for the committee, after which it plans to present its views directly on items under discussion. She said the recognition matters because FIVI represents vertically integrated wine businesses that manage every stage of production, from the vineyard to the bottle.

Alongside the debate over restaurant pricing, Babini argued that direct sales at wineries and hospitality sales should be seen as complementary rather than competing channels. Citing data collected with Nomisma Wine Monitor, she said almost 50% of independent growers’ revenue comes from Horeca and about 21% from direct sales. In her view, a customer who discovers a wine at a winery or trade fair may later look for the same label in a bar, restaurant or wine shop.

She said the key is for each wine to find the right place and to be presented in a way that explains its individuality. That, she said, increases the importance of direct relationships between winegrowers and hospitality operators.

Babini also cited Nomisma Wine Monitor research suggesting that independent producers have a relatively strong position in the hospitality market. She said 44% of Horeca operators surveyed said they know FIVI well, while another 26% said they had

heard of it. Among those unfamiliar with FIVI, she said more than one in three expressed interest in learning more about or adding wines from FIVI members to their offering.

She said the FIVI brand is closely associated with territorial identity, craftsmanship, quality and authenticity. According to the figures she cited, 68% of respondents associated the winegrower figure with artisanal production, 64% with a strong personal identity and 63% with a focus on quality rather than quantity. She also said 91% of respondents believed wines from independent winegrowers genuinely reflect the values they claim, 84% said they are clearly distinct from industrially produced wines, and 78% said offering them enhances the image of their business.

Babini also pointed to wine tourism as a growing source of income for smaller producers. She said wine tourism accounts on average for 14% of revenue at companies that offer it, and that 56% of those businesses reported higher wine tourism revenue over the past two to three years. More than 80% of FIVI members offer services for wine tourists, especially guided visits and tastings, she said, and more than 40% of annual visitors to their wineries come from abroad.

The Bologna event is taking place at a time when Italian wine producers are trying to balance rising costs with slowing demand and to strengthen ties with restaurants and other commercial channels. Babini’s comments suggest that, for independent growers, the pricing debate is less about setting a uniform cap on restaurant margins than about preserving a market structure in which consumers can still afford to order wine and small producers can still earn a sustainable return.