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Super Tuscan Wines Drive Stability in Italy’s Fine Wine Market Despite Global Downturn

Masseto and other top Tuscan labels see prices rise over 5% as buyers concentrate on established brands during uncertainty

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The fine wine market has faced a challenging period over the past three years, but Italian wines, particularly those from Tuscany, have shown notable resilience. Liv-ex, the global exchange for fine wine, recently released an update on the Italy 100 index, which tracks the performance of 100 leading Italian wines. Drawing on twenty-five years of pricing and transactional data, the report highlights how Super Tuscan wines have played a key role in supporting the index’s stability amid broader market weakness.

According to Liv-ex data, while the overall fine wine market has experienced a decline, the Italy 100 has remained relatively stable. This stability is largely attributed to strong trade in Tuscan wines. The report notes that at the peak of the market downturn, increased spending on high-value Burgundy wines contributed to a temporary dip in Italian wine prices. However, Tuscany’s leading labels quickly regained momentum.

Masseto, one of Tuscany’s most prestigious producers, has led recent gains among the Italy 100’s Tuscan components. The 2020, 2022, 2016, and 2014 vintages of Masseto are all up more than 5% year-to-date. The 2020 vintage has seen the sharpest rise in its mid price—the midpoint between the highest offer and lowest bid—while the 2016 vintage remains well-supported by ongoing trade.

Sophia Gilmour, Market Analyst at Liv-ex, commented on these trends: “While we've talked at length about the Italy 100's resilience, it's largely been the Super Tuscans driving this. When market conditions are tough and cash is in short supply, we should expect demand for higher value, rarer wines, such as the index's Piedmontese components, to fall, in turn leading to weaker prices. Super Tuscans outperforming the likes of Giacosa and Conterno, then, isn't surprising. What's more interesting is the narrowing of concentration on these select few Tuscans. On the one hand, this is a testament to the strength of brands such as Sassicaia and Tignanello; on the other, it highlights the still-cautious mood of the market.”

Trade data from Liv-ex shows that so far this year, 157 different Tuscan wines across multiple vintages have traded on the exchange. Despite this breadth of activity, just nine wines now account for over 80% of Tuscany’s traded value—a significant concentration compared to previous years. Earlier in the 2000s, it was not uncommon

for key Super Tuscans to represent nearly all Tuscan trade on Liv-ex.

This shift suggests that buyers are focusing their attention and resources on a smaller group of established brands during uncertain times. The report indicates that while interest in high-value Piedmontese wines such as those from Giacosa and Conterno has softened under current market conditions, demand for top Super Tuscans remains robust.

Liv-ex’s analysis provides insight into how collectors and investors are navigating a changing landscape for fine wine. As economic pressures persist globally and liquidity remains tight for many buyers, established names with strong brand recognition continue to attract interest and support prices within Italy’s premium wine sector.

For those interested in further details or data visualizations from Liv-ex’s latest report on Tuscany and the Italy 100 index, additional information is available through their official channels.