

INSIDE ITALIAN WINE'S NEXT MOVE IN AMERICA

Wine & Trade Dialogue

May 1st, 2025, 12:00pm

Cafe Milano

3251 Prospect St NW,
Washington, DC 20007

Roundtable Summary Report

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Roundtable Summary Report: Inside Italian Wine's Next Move in America

*Cafe Milano, Washington D.C., USA
1 May 2025*

This ***Roundtable Summary Report: Inside Italian Wine's Next Move in America*** captures and disseminates the insights and strategies discussed at the roundtable event held on 1 May 2025 in Washington, D.C. Organized by Veronafiere and the Italian Trade Agency (ITA), the roundtable brought together key stakeholders from the Italian and US wine sectors to address the evolving challenges faced by Italian wine in the American market.

As Italian wine remains a significant cultural and economic export, the discussion highlighted the need for a collective, strategic response to the uncertainties currently affecting the market, including tariff pressures, changing consumer behaviors, and shifting global economic conditions. The purpose of this report is to provide a comprehensive overview of the roundtable's key takeaways, offering practical recommendations and insights for Italian wine producers, importers, distributors, and other key players in the sector.

*Opposite,
Ambassador Mariangela Zappia, Ambassador
of Italy to the United States of America.*

*This page,
from left Adolfo Rebughini, General Manager
of Veronafiere, Matteo Zoppas, President of
ITA – the Italian Trade Agency (ICE Agenzia),
Federico Bricolo, President of Veronafiere.*





Matteo Zoppas, President of ITA - the Italian Trade Agency (ICE Agenzia).

By capturing the spirit of collaboration and the shared commitment to elevating Italian wine's presence in the US, this document aims to diffuse the gathered information and foster ongoing dialogue to strengthen the position of Italian wine in one of its most important global markets.

Through this report, stakeholders will gain valuable perspectives on navigating current challenges, identifying emerging opportunities, and enhancing the visibility and resilience of Italian wine in a dynamic and competitive marketplace.

A Brief Overview

1. Vinitaly.USA Chicago is an international project that brings the most exciting Italian wine expo in the world to the United States. It is aimed at industry professionals linked by a common passion for hospitality, food and wine. This roundtable forum, the latest in a series of high-profile events, was held in Washington DC on 1 May 2025.
2. Italian wine is a key export and potent symbol of Italy's broader cultural and economic relationship with the United States. The Washington roundtable provided a timely moment of collective reflection and strategic thinking — at a time when global trade dynamics are rapidly evolving.
3. The high-level discussion brought together importers, distributors, retailers, policy makers and institutional leaders to address how Italian wine can strengthen its position in the US market amid tariff uncertainty, shifting consumer trends and global economic challenges.
4. The over-riding focus of the roundtable was how the Italian wine sector can respond to the current uncertainty in the U.S. market.
5. The event was hosted by Veronafiere (the organizer of Vinitaly) in collaboration with ITA – the Italian Trade Agency, and the cooperation of a range of relevant stakeholders and office holders.
6. The roundtable opened with an Institutional Address and Opening Remarks from Ambassador Mariangela Zappia, Federico Bricolo, President of Veronafiere, Adolfo Rebughini, General Manager of Veronafiere and Matteo Zoppas, President of ITA.
7. The purpose of the roundtable discussion was to give wholesalers, importers, distributors, retailers and producers specializing in Italian wine a platform to share their experiences and present solutions to the challenges currently facing the sector.

Key Topics during Discussion

- The impact of current 10 per cent tariffs on Italian wine exports and evolving U.S. market behavior
- Strategies to maintain visibility and resilience in a price-sensitive environment
- The role of trade events like Vinitaly.USA Chicago in fostering long-term collaboration between Italian producers and US partners

Participants

- Ambassador of Italy to the United States of America, Ambassador Mariangela Zappia
- President of Veronafiere, Federico Bricolo
- President of ITA – the Italian Trade Agency (ICE Agenzia), Matteo Zoppas
- General Manager of Veronafiere, Adolfo Rebughini
- Representatives from Wine & Spirits Wholesalers of America (WSWA) and the National Association of Beverage Importers (NABI)
- Leading U.S. importers, distributors, and retailers specializing in Italian wine
- Award-winning Italian wine producers and brand owners



Manifesto for the Italian American wine sector in uncertain times

Celebrate Made in Italy

Opposite,

Federico Bricolo, President of Veronafiere.

1. Emphasize Italian quality and the Italian way of life.
2. Use wine as a driver for Made in Italy and a gateway for other Italian products and services.

Maximize the influence of Vinitaly

3. Maximize the potential of Vinitaly and Vinitaly.USA to bring key global stakeholders together to address the most pressing geopolitical challenges.
4. Use Vinitaly.USA to take Italian wine into the heartland of America, beyond the eastern and western seaboards.
5. Use Vinitaly.USA to bring producers to the marketplace.

Engage with policy makers

6. Engage at every opportunity and at every level with governmental and diplomatic agencies and individuals. Be explicit to government trade officials about the harm tariffs cause.
7. Tell the story of small and medium sized wine businesses across the United States (local restaurants and hotels and family-owned wine shops) and emphasize how they make communities richer, both financially and culturally.

Empower producers

8. Enable small and medium sized producers to channel their limited resources appropriately to be most effective in the US market.
9. Be consistent, be present in the market and don't get too distracted by everything else that is going on!
10. Emphasize the uniqueness of Italian wine. There is no substitute!



Summary of opening remarks and roundtable discussion

*Cafe Milano, Washington D.C., USA
1 May 2025*

Stevie Kim, Managing Partner Vinitaly, opened the roundtable, entitled 'Inside Italian Wine's Next Move in America,' with the objective of bringing together key figures from both sides of the Atlantic to explore how to collectively strengthen the position of Italian wine in the U.S. against the backdrop of the current global uncertainties. As well as considering the implications of the tariff measures currently being proposed (on 13 March the Trump administration threatened to impose 200 per cent tariffs on alcoholic products from Europe), the discussion would also address shifting consumer trends that are currently shaping the U.S. market.

In her opening remarks, **Ambassador Mariangela Zappia, Ambassador of Italy to the United States of America**, emphasized the importance of wine and spirits to the Italian way of life, and in particular the high quality that Italian wines and spirits represent.

While acknowledging the challenges and uncertainty the industry is currently facing, Ambassador Zappia also expressed the view that there was some cause for optimism, not only in relation to wines and spirits, but also with regards to many other iconic Italian products.

Ambassador Zappia also highlighted the success of Prime Minister Meloni's recent meeting with President Trump, indicating that dialog was ongoing and productive.

The relationship between Italy and the United States is strong and the strength of that relationship can influence the market. Ambassador Zappia explained that 33-35 per cent of Italian exports of wines and spirits reach the United States, with further growth possible.

Ambassador Zappia noted the success of bringing Vinitaly to the United States and the important role played by the Italian Trade Agency (ICE) and that such ventures represent the best way to showcase the incredible breadth of production of Italian wine and spirits in America.

Federico Bricolo, President of Veronafiere, explained that Veronafiere was founded in 1898 with the first trade fair dedicated to agriculture. There are now around 40 major trade fairs in Verona every year, including SaMoTer, Fieracavalli, ArtVerona, LETEXPO and Marmomac, the biggest marble and natural stone trade fair in the world.

President Bricolo explained that Vinitaly is the largest and the most important trade fair in Italian wine in the world, which held its 57th edition last month in Verona. This year more than 4,000 exhibitors from every Italian region came to Verona, as well as 97,000 visitors and stakeholders and over 30,000 buyers from 140 different countries.



*Opposite,
Adolfo Rebughini, General Manager
of Veronafiere.*

*This page,
Stevie Kim, Managing Partner Vinitaly.*



*Robert Allegrini, President of the
National Italian American Foundation (NIAF).*

The fair went very well, despite the problems related to international geopolitical tension and, in particular, the threat of punitive tariffs, demonstrating that Italian wine is widely appreciated and recognized as a benchmark of Made in Italy.

President Bricolo also noted the positive response of the American market, with five per cent more buyers from the United States compared to the previous year, which was a record year with more than 3,000 buyers present in Verona.

Finally, President Bricolo introduced the second edition of Vinitaly.USA, announcing that it would be held in Chicago on 5 and 6 October 2025.

Robert Allegrini, President of the National Italian American Foundation (NIAF), welcomed the announcement of a second edition of Vinitaly.USA in Chicago and emphasized the need to expand knowledge of Italian wine by taking it beyond the eastern and western seaboard and into the heartland of America, where it is not as well-known as it is on the east or west coasts but where there are many opportunities. Holding Vinitaly.USA in Chicago, in the center of the country, makes it easily accessible and is one way to ensure Italian wine sales increase going forward.

Matteo Zoppas, President of the Italian Trade Agency (ICE), emphasized the role of distributors and importers and their role in establishing Italian wines as the protagonist of the American wine market, indicating that Made in Italy is worth 624 billion in 2024, of which 69 billion are represented by the “agroalimentare” sector.

President Zoppas also emphasized the value of wine to the Made in Italy brand, worth eight billion in exports, two billion of which are to the United States, representing a significant proportion of the wine export market. President Zoppas also noted the placement of Italian wine in the middle and high positioning in the market, putting it in the right place, at the right time and at the right level.

ICE's mission is to work alongside the diplomatic efforts of the Italian government, led by Prime Minister Meloni and Antonio Tajani, the Minister of Foreign Affairs, within the wider context of development diplomacy.

ICE is investing significantly to develop Made in Italy across all categories, but has chosen wine as a key strategic category, despite the current uncertainty surrounding tariffs, based on the twin targets of 700 billion in export for the general categories and 100 billion for agriculture, including wine.

ICE has decided to reinforce the project, developed by Veronafiere and Vinitaly, to bring the producer to the market, not only bring the market to the producers, as it does in Verona. ICE supported a significant number of incomings to Chicago to better develop the market and to make it easier to import and distribute Italian products.

President Zoppas emphasized the opportunities provided by Vinitaly.USA Chicago, not just for the big and powerful players, but also for the many small and medium-sized companies represented.

In just two years, Vinitaly has created a significant presence in America with almost 300 producers and 1,800 labels present. ICE will continue to work with Veronafiere to develop the Vinitaly.USA brand with the help and collaboration of partners and stakeholder, producers, distributors and importers, with the objective of putting the right people, the right producer and the right wines, in front of the right buyers.

Adolfo Rebughini, General Manager of Veronafiere, emphasized how Italians are passionate about everything, not least their work, and that the Vinitaly brand represents a commitment to excellence. Mr. Rebughini explained that the Vinitaly brand is only used twice, in Verona and in the United States, demonstrating the importance of the American market. The mission of Vinitaly, Mr. Rebughini explained, is to facilitate and promote the excellence of Italian wine, both domestically and internationally.

Mr. Rebughini suggested that the first response to tariffs should be to utilize the platform provided by Vinitaly.USA. While Vinitaly is a trade show, a marketplace of transactions, it also brings together key stakeholders, associations, consortiums, producers, the three-tier system, importers, distributors, restaurants, and consumers. In Verona, Vinitaly took place just a few days after the announcement on tariffs, meaning that everyone was in the right place to address the problems and discuss possible responses.

Mr. Rebughini noted that American buyers present at Vinitaly were up by five per cent year on year, and that the Italian government has a very privileged relationship with the American President, emphasizing the importance of Francesco Lollobrigida, the Minister of Agriculture, as the main sponsor of Vinitaly.

In drawing his remarks to a close, Mr. Rebughini emphasized that in times of uncertainty, Vinitaly is not just a place to discuss the market, it's where the future of Italian wine is shaped.

Robert Tobiassen, President of National Association of Beverage Importers, underlined that, in response to the current crisis, the industry needs to talk to its governments. Since it is governments that create tariffs and trade policy, it's important for them to hear directly about the damage they can do to the sector, be it the wine producing sector, the marketing sector, or the hospitality sector.

Mr. Tobiassen emphasized the importance of communicating to government trade officials, particularly in the EU, and the importance of reaching consensus in the European Commission. Mr. Tobiassen observed that on 2 April, when President Trump announced his tariff policy in the Rose Garden, he said that the EU technically imposes a 39 per cent tariff on US products coming into the EU, but that included VAT and other factors that aren't considered a tariff.

Matteo Zoppas, President of the Italian Trade Agency (ICE), responded by indicating that a conversation would take place shortly, and that the objective of any negotiations would be the removal of tariffs and any other barriers to trade, because the impact of such tariffs would be negative on both sides.



Robert Tobiassen, President of National Association of Beverage Importers.



Tara Empson, CEO of Empson USA.



*Roger Murry, Senior Policy Advisor
of Akin Gump Strauss Hauer & Feld LLP.*



Charles Lazzara, Owner of Volio Imports.

President Zoppas emphasized the importance of dialogue and suggested that there could be a trip to Italy by the American administration. The Italian government was on the side of the wine sector and at the forefront of the dialogue at a European level, assisting Italian producers to approach the market in the best way.

President Zoppas concluded his intervention by observing that the United States was an important strategic partner for Italy, and that he hoped that tariffs would just be a temporary setback in that relationship. In the meantime, the industry should continue the kind of activities that will maintain the relationship between producers and buyers because when you lose momentum with a brand it's very difficult to rebuild it from scratch.

Stevie Kim indicated that she was excited to hear from Senator Michael Rulli, co-chair of the Italian American Congressional Delegation, that Italians were leading the dialogue between the European Union and the United States.

Tara Empson, CEO of Empson USA, acknowledged that importers were currently facing a very difficult situation, not least because of rising costs. Ms. Empson expressed the view that quality should not be made inaccessible by rising prices as a consequence of tariffs.

In terms of solutions, Ms. Empson suggested that producers must continue to invest in the American market, but that doing so was a long-term commitment that required price stability and consistency.

Ms. Empson also observed that perceptions were also changing, and that the industry had to emphasize, particularly with younger consumers, that wine was more than just alcohol, highlighting the importance of people's stories and the lives behind the wine.

Drawing on publicly available sources and some private conversations, **Roger Murry, Senior Policy Advisor of Akin Gump Strauss Hauer & Feld LLP**, explained that the U.S. administration had gathered a template trade agreement, a text, that they were beginning to socialize with about 19 different governments. Against a backdrop of a 90-day window most of the negotiations were not very far along. There were some exceptions, notably Australia, and the EU, where negotiations have been more prominent.

Mr. Murry explained that he represented the US Wine Trade Alliance, a coalition of small and medium-sized wine businesses across the United States, emphasizing their importance to making communities across the country richer, both financially, but also culturally, as gathering spots.

He emphasized the importance of telling the story of American businesses, explaining that Congress, despite its reputation, likes to listen and to represent their districts and states, and likes to hear from prominent local businesses, which are often restaurants and local wine shops. Mr. Murry encouraged importers to engage with the Wine Trade Alliance, to find some of these iconic local businesses, and get them an audience with key policy makers.

Charles Lazzara, Owner of Volio Imports, suggested that the opportunities in the American market remained significant and that importers were the pulse of the wine community in the United States as they met face to face with wine buyers and wholesalers every day. He also suggested that small to medium-sized importers were the most agile, as well as small to medium sized wholesalers, in responding to the needs of a changing environment around not only tariffs, but the wine business in general because of their proximity to the market.

Fundamentally, Mr. Lazzara said, importers could play a critical role in the development and stabilization of the Italian wine market of the United States. Events like Vinitaly are critical for that. As an importer Mr. Lazzara had incredible success in Chicago on day one and day two, with key buyers coming to visit their stands, taste their wines, and learn more about them. It was an opportunity for dialog and for them to tell the stories of their producers that might otherwise struggle to get to the market.

Mr. Lazzara emphasized the importance of having a micro-strategy, operating at state and city level, with a focus on what restaurant might work best for any given wine.

Notwithstanding the current uncertainty, Mr. Lazzara indicated that America was still a market of tremendous opportunity and that it was important to be consistent, present, and focus on the job in hand, avoiding distractions and making sure that the voices of producers got heard and their stories got told.

Dina Opici, Chairwoman of the Wine & Spirits Wholesalers of America (WSWA) and head of Opici Family Distributing, explained that she was the fourth generation in her family's wine and spirit distribution business. While Opici has a diverse experience representing wine and spirits from around the world, the company was founded around Italian wines.

Ms. Opici observed that about 50% of the wines that they import into the United States are Italian, and that the impact of tariffs could be significant. Ms. Opici also identified other issues, such as conversations around dietary restrictions and shifting consumer sentiments and preferences. Addressing these challenges would make the industry stronger and more creative.

Referring to the distribution side of the business, Ms. Opici noted that making changes in pricing was very challenging in the context of the current tariff uncertainty.

Francis Creighton, President and CEO of Wine and Spirits Wholesalers of America, Inc. (WSWA) explained that WSWA is a trade association for the wholesale tier whose members are the largest medium and small wholesalers in the country, representing about 86 per cent of every bottle sold wholesale in the United States.

Mr. Creighton indicated that the industry must come together at events like this, talk to each other, and share information. The WSWA is working very closely with colleagues in the supply, wholesale and retail tier to make sure that they are all sharing information and moving in the same direction.



Dina Opici, Chairwoman of the Wine & Spirits Wholesalers of America (WSWA) and head of Opici Family Distributing.



Francis Creighton, President and CEO of Wine and Spirits Wholesalers of America, Inc. (WSWA).



Federico Veronesi, CEO & Owner of Oniwines.

Mr. Creighton also emphasized the importance of ensuring that industry and political leaders are speaking to the administration in the best way they can to help them understand the nature of Italian wine. Wine is a unique and complex product that cannot be replicated elsewhere. Convincing the administration that putting a massive tariff on wines from Italy does not mean that buyers are going to shift purchasing to Californian wine. It either means the buyer is going to avoid the category altogether, the last thing the market needs, or that they're going to absorb the tariff and pay more tax, which ultimately will fall on the consumer. Ultimately, Mr. Creighton explained, the entire industry must work together.

Mr. Creighton also recognized the importance of responsible consumption and events like Come over October or Share and Pair Sundays that bring people together and promote understanding.

Federico Veronesi, CEO & Owner of Oniwines, explained that he was new to wine production but had more than 40 stores in Italy with direct access to wine consumers.

He has noticed a change in the consumption of wine. While the focus has been on distribution and retail, we should not forget the consumer. Consumer behavior is changing. Everything is becoming faster with increased focus on the experience, on the emotion that wine provides, rather than the technical aspects. Most people that drink wine don't know anything about it. They just want to enjoy it and have fun.

Italian lifestyle and Italian quality have many different aspects, not just wine, so an effective way to deliver Italian wine could be through contamination with other industries, such as fashion, which shares the ideals of Italian craftsmanship. Wine should find a way to be more modern and dynamic. Consumers want to know something about the craftsmanship that is typical and unique to the Italian territory.

Molly Matelski, Director of Buyer Relations, Programming & Partnerships of Vinitaly.USA, explained that in times of challenge like these, Vinitaly provides a platform, not just another exposition. It has lounge style signature seating conducive to having conversations, not just walk around tasting, but sitting down, meeting producers, getting to know their stories, and making business decisions. The event programming includes masterclasses, panel discussions and other ways to engage, especially with younger consumers and younger buyers. Genuine networking opportunities are also available to meet with producers and other decision makers throughout the U.S.

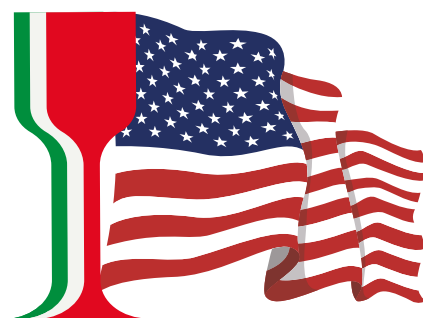
Adolfo Rebughini, General Manager of Veronafiere, emphasized that the U.S. market for wine was not replaceable because of the numbers involved, worth almost two billion euros, but that the industry has always been resilient and survived many challenges in the past, providing cause for optimism.

Matteo Zoppas, President of ICE Agenzia, emphasized the observation that there is no substitute for Italian wine.



*Molly Matelski, Director of Buyer Relations,
Programming & Partnerships of Vinitaly.USA.*





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