

CONEGLIANO VALDOBBIADENE PROSECCO DOCG

# Economic Sustainability of Heroic Viticulture

*Slope Distribution Analysis & Strategic Outlook — Conegliano Valdobbiadene Area*

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# What Makes Viticulture 'Heroic' in Conegliano Valdobbiadene area?

## TERROIR

Slopes exceeding 30% gradient — 1,403 ha, or 18% of the DOCG zone — require exclusively manual labour; mechanisation is impossible.

## UNESCO HERITAGE

The Conegliano Valdobbiadene hillside landscape is inscribed as a UNESCO World Heritage Site, conferring irreplaceable cultural and branding value.

## PREMIUM COST

Labour costs on heroic vineyards are higher than flatland counterparts; slopes from 25–30% represent an additional 507 ha of challenging terrain.

# Ruggeri — Quality & Commitment at the Peak of Prosecco

**147 ha**

Cartizze/Valdobbiadene DOCG  
Vineyards of which 79 ha very  
steep/highly labour intensive  
slopes

**4.0M**

Bottles  
produced

**37**

Employees

**55**

Export markets  
(66% of turnover)

**~12%**

of entire  
Cartizze yield

## The Largest Family in Valdobbiadene

A direct-harvest model built on trust with 100+ grape-growing families. These long-term relationships — ranging from 35,000 to 40,000 quintals per vintage — ensure consistent access to top-tier fruit and underpin Ruggeri's quality-first philosophy.

## Quality Leadership & Cartizze

Ruggeri is the single largest harvester and vinifier of Cartizze grapes — the most prestigious sub-zone of Valdobbiadene where the slopes are very steep and characterized by 'heroic viticulture' — accounting for approximately 12% of the entire Cartizze yield and steep/highly labour intensive slopes. The winery represents peak of quality in the global Prosecco landscape.

## Pioneering Spirit & Ageing Culture

"Hic Sunt Leones" — Ruggeri has always led by innovation, championing longevity and the culture of ageing in Prosecco. With 162 fermentation tanks and planned capacity expansion, the winery is built for premium, future-facing growth.

## Grape Production Costs per Hectare — Comparison by Cultivation system

	<b>Sylvoz / Double Arched Cane</b> <i>Partial mechanisation — flat/gentle slopes</i>	<b>Double Arched Cane — Hill</b> <i>Machine-accessible terrain</i>	<b>Double Arched Cane — Heroic</b> <i>Steep hill NOT accessible by machines</i>
Production cost/ha (employed-staff farm)	€ 9.883	€ 13.410	€ 21.822
Production cost/ha (owner-operated farm)	€ 6.283	€ 5.814	€ 7.697
Farm labour (hours/ha)	200 hours	422 hours	842 hours
<b>Grape cost @ 130 q/ha (employed-staff farm)</b>	<b>€ 76,02 / q.</b>	<b>€ 103,15 / q.</b>	<b>€ 167,86 / q.</b>
Grape cost @ 130 q/ha (owner-operated farm)	€ 48,33 / q.	€ 44,72 / q.	€ 59,20 / q.

# Challenges & Opportunities

## ⚠ CHALLENGES

### 01 Extreme Labour Costs

842 labour hours/ha vs 200 on flat terrain — a cost multiplier that makes heroic vineyards structurally uncompetitive without premium pricing.

### 02 No Mechanisation Possible

Slopes above 30% exclude all standard vineyard machinery. Every operation — pruning, training, harvest, transport — is 100% manual.

### 03 Land Abandonment Risk

When grape prices fall to 50% of Prosecco benchmark levels, margins evaporate. The 1,403 ha of heroic land face real risk of abandonment.

### 04 Labour Market Shrinkage

Skilled vineyard workers are an aging, declining pool. Recruiting for back-breaking steep-slope work at €18/hour is increasingly difficult.

### 05 Phytosanitary Pressure

Flavescence dorée, Esca and other vine diseases increase fallanze (missing vines), further reducing yield and increasing per-quintal costs.

## ✦ OPPORTUNITIES

### 01 UNESCO Landscape Premium

The Conegliano Valdobbiadene UNESCO inscription is a globally recognised badge of terroir. Heroic vineyards sit at the visual heart of this designation.

### 02 Price Premium Potential

Rive and Cartizze sub-zones — all heroic terrain — command consumer price premiums over standard DOCG. The premium ceiling has not been reached.

### 03 Export Growth Narrative

International premium wine markets (USA, Germany, UK, Nordics) are actively seeking authentic, high-story-value products. Heroic viticulture is a compelling narrative asset.

### 04 Enotourism & Experiential

Steep vineyard landscapes attract high-value tourists. Guided harvest experiences, hillside lodges and tasting trails can generate revenue beyond the bottle.

### 05 Innovation & R&D Frontier

Monorail systems, drone spraying, precision viticulture and AI-assisted vine monitoring are actively reducing the cost gap — early adopters gain competitive advantage.

# 4 Pillars for Long-Term Economic Viability

**1**

## **Heroic Vineyard Premium Certification**

Establish a formal slope-based certification ( $\geq 30\%$ ) enabling verified price premiums at retail and HoReCa, backed by DTM data.

**2**

## **Subsidy & PAC Policy Advocacy**

Lobby Regione Veneto and MIPAAF for targeted contribution eco-scheme payments for steep-slope viticulture maintaining landscape and biodiversity.

**3**

## **Technology Innovation Investment**

Drone, precision viticulture R&D and monorail co-funding, to reduce the cost gap between heroic and flatland production.

**4**

## **Heroic Viticulture Tourism & Storytelling**

Monetise the UNESCO landscape through enotourism packages, experience trails, and digital storytelling targeting premium consumers worldwide.