

liberty
OF STYLE



Varietal Wines **Certified Origin** **and Quality**



2018

- A region of family vineyards
- Character & climate
- Certified origin and quality label
- Broad range of varietal wines
- Guaranteed sourcing
- A collective diversified offer
- Booming varietal wines
- Creative studio
- Environmental and social awareness
- Future objectives



Vins Pays d'Oc IGP, a region of family vineyards

Languedoc-Roussillon

240 000 hectares



50 %
of the vineyard
is dedicated to the production
of IGP Pays d'Oc varietal wines.



IGP Pays d'Oc
120 000 hectares

**Covering
4 Departments**
each developing particular
styles in their wines.



Cultivated
by



200 Privately owned properties

- Family structures inherited from generation to generation
- Renewal of ownership and investments

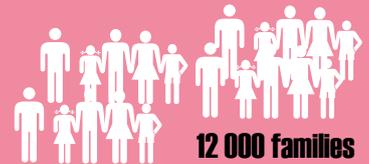


1 200 families



175 Cooperative cellars

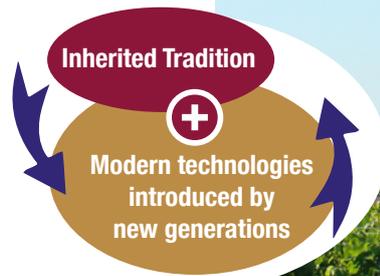
- 12 000 vine growers supply cooperatives



12 000 families

Wine is in our nature

- Wine-growing culture stretching back thousands of years.
- Rich and dense diversified production.
- Rural economy creates Languedoc's landscape.
- Our viticulture is firmly rooted in Languedoc-Roussillon's landscape, forming the authenticity and strength of our regional network.



Languedoc character & Mediterranean climate



A climate which ensures healthy vines

The PGI Pays d'Oc production area covers Languedoc-Roussillon:

- France's third sunniest region
- Swept by four regional winds
- Between garrigue, pine forests, olive trees, green meadows, oaks and strawberry trees
- Has good pedoclimatic conditions
- Allows synergy with nature



Healthy vines

→ more natural crop

- **Minimises the use of treatments**
- **Grapes mature naturally** thanks to copious sunshine



Languedoc-Roussillon:

1st region for organic production,

with 25 000 hectares certified representing 1 hectare out of 10 and an annual production estimated at 1 million hl.



IGP Pays d'Oc BIO wines:

1st French area of production with 500 000 hl or 67 million bottles produced by 150 privately owned wineries & 30 Cooperative cellars.



The natural ripening process,

developing the level of grape sugar and concentration of musts is due to the exceptional pedoclimatic conditions. The Union of Producers of IGP Pays d'Oc Wines prohibits chaptalisation, a commonly used practice in other regions which encourages early harvesting with a ripeness compensation by the addition of sugar.

The natural ripening of grapes leads to **strong concentration in style and highly aromatic varietal wines**. Varietal IGP Pays d'Oc wines are characterised in style principally by intense **fruit**.





IGP Pays d'OC: Certified Origin and Quality Label



From the Producers : Commitment to quality

Producers accept the strict monitoring that comes with our specifications. They choose the dynamic and value-adding PGI Pays d'OC and each year dedicate 50% of their harvest to it.

The role of the union: Large scale quality control

ALL YEAR ROUND the teams of the Union of Producers of IGP Pays d'OC wines and a panel of external tasters operate a systematic administrative and organoleptic control of the wines.

18 000 wines controlled and tasted

By 120 tasting commissions

By a pool of 350 motivated tasters



10



An administrative team processes requests for certification.

10



Constantly touring the Languedoc-Roussillon

A team of technicians collects samples (2 for each specific wine) and prepares their anonymity for their organoleptic blind tasting.

EACH WEEK

this represents:

Up to 900 tanks sampled and tasted

3 organoleptic tasting commissions

Up to 180 tasters involved

THE TASTERS

are spread out in 3 groups according to their activity:

TECHNICIANS: members recognised for their professional qualifications (laboratory oenologists).

ECONOMIC OPERATORS: members representing IGP Pays d'OC producers and the economic network (independent wineries, cooperative cellars, wine merchants and distributors).

PROFESSIONALS IN CONTACT WITH THE PRODUCT: members representing users of the product (wine waiters, commercial representatives, sales promoters, consumers, agents).

80% of our tasters have superior education diplomas specialised in viticulture and oenology (DNO, BTSA, BA, Masters, DESS).

3% are wine waiters.

10% are wine producers and/or have certificates in viticulture and oenology.

7% are consumers (100% have followed a training program in tasting organized by the IGP Pays d'OC union).



1 sample is tasted by at least 3 tasters from at least 2 different groups



BUREAU VERITAS

All of our activities are audited each year by the BUREAU VERITAS CERTIFICATION, a qualified independent control organisation.

9 control points

- 1 - Qualification of the tasting commission for the organoleptic examination
- 2 - Composition of the jury
- 3 - Organisation of the jury
- 4 - Control of tasting conditions for the organoleptic examination
- 5 - Preparation of the samples
- 6 - The tasting session
- 7 - Individual tasting notes
- 8 - Overall summary
- 9 - Report

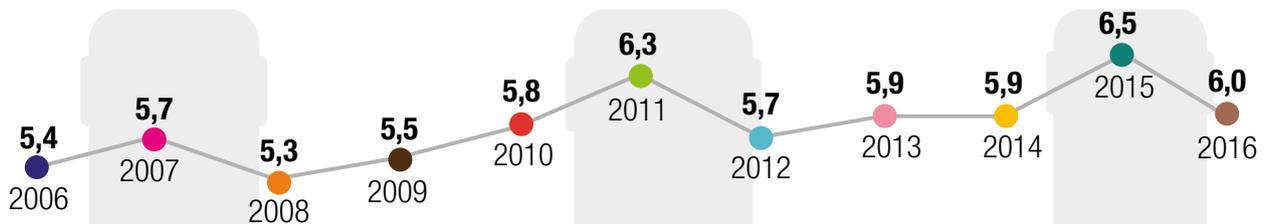


Broad range of varietal wines

Certified Quality and Origin



A stable production level: for each vintage, approx. **6 million hl**



Inherent diversity because of our **58 grape varieties**

red
54%

white
25%

rosé
21%

3,2 M. hl = 428 million

1,5 M. hl = 204 million

1,2 M. hl = 165 million

Merlot	1 340 688 hl
Cabernet-Sauvignon	861 151 hl
Syrah	433 109 hl
Générique Rouge	176 419 hl
Pinot Noir	113 460 hl
Grenache Noir	104 336 hl
Cabernet Franc	61 702 hl
Marselan	44 481 hl
Carignan Noir	22 912 hl
Malbec	21 544 hl
Alicante H.Bouschet	14 835 hl
Mourvèdre	6 669 hl
Petit Verdot	4 326 hl
Caladoc	3 067 hl
Tempranillo	1 884 hl
Cinsault	1 085 hl
Portan	530 hl
Carménère	433 hl
Nielluccio (Sangiovese)	82 hl

Chardonnay	743 383 hl
Sauvignon Blanc	432 683 hl
Viognier	126 842 hl
Générique Blanc	54 079 hl
Grenache Blanc	39 286 hl
Muscat petits grains	38 918 hl
Vermentino	25 195 hl
Colombard	22 989 hl
Terret blanc	9 069 hl
Marsanne	8 746 hl
Roussanne	5 460 hl
Gewurztraminer	4 672 hl
Chasan	4 659 hl
Muscat d'Alexandrie	2 989 hl
Pinot Gris	1 962 hl
Sauvignon gris	1 761 hl
Chenin	1 757 hl
Mauzac	1 706 hl
Pinot Blanc	911 hl
Alvarinho	843 hl
Riesling	620 hl
Clairette	578 hl
Semillon	295 hl
Macabeu	241 hl
Grenache gris	61 hl
Gros Manseng	29 hl
Petit Manseng	5 hl

Grenache Noir	376 855 hl
Cinsault	302 656 hl
Syrah	256 241 hl
Générique Rosé	119 477 hl
Merlot	113 515 hl
Cabernet-Sauvignon	29 049 hl
Cabernet Franc	17 805 hl
Pinot Noir	14 349 hl
Grenache Gris	6 907 hl
Pinot Gris	1 050 hl
Sauvignon Gris	390 hl
Petit Verdot	343 hl
Mourvèdre	236 hl
Malbec	100 hl
Marselan	60 hl



1st French IG

For the production of Rosé
(23% of French Production)

Source: Certifications / SVPOC

The diversity of terroirs, of economic structures, of philosophies, the regional geographic parameters of the territory's production, based on the diversity of grape varieties, traditions, experience and the energy of the producers have led to an

infinite combination of aromatic styles for each grape variety



Guaranteed Sourcing



Cooperative cellars and private wineries produce, each year:



6 million hl



800 million equivalent bottles



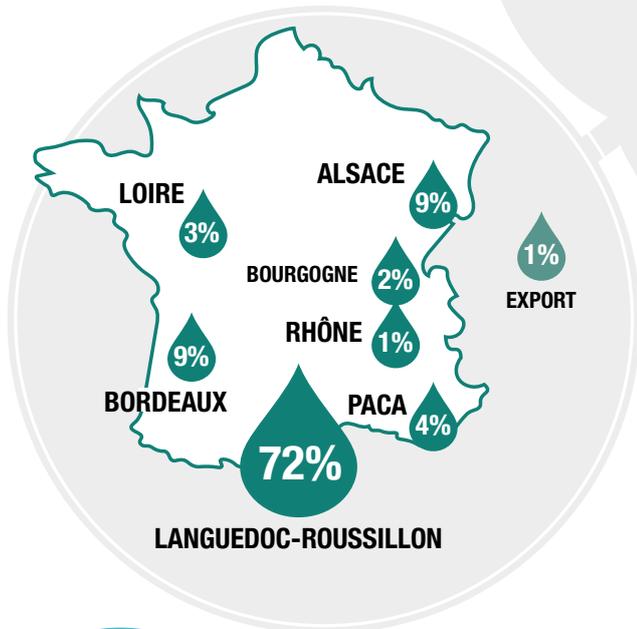
Wine merchants buy 85% of the production in bulk to supply their needs for trade marks in varietal wines:



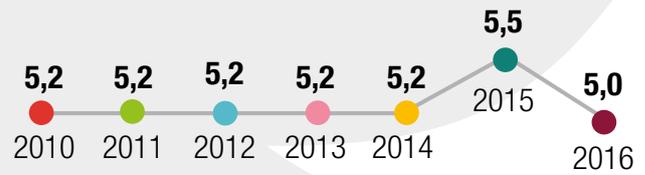
5,2 million hl



690 million equivalent bottles



The highly structured bulk market provides stability in volumes traded in millions of hectolitres :



Source: Bulk Contracts / Inter Oc

Geographic spread of merchant customers

72% of wines are bought in bulk **by merchants of the Languedoc-Roussillon region** but merchants throughout France capitalise on sales of varietal IGP Pays d'Oc wines for their commercial trade brands.



10% under a three-year contract

Introduced in 2014, it currently concerns more than 500,000 hectolitres.

Objectives:

- ✓ Galvanize partnerships
- ✓ Consolidate the bulk market

Advantage: security for both parties.

FOR THE SELLER The pre-sold volume provides a financial guarantee thereby favouring investments.

FOR THE BUYER The reserved volume solves the need for sourcing.

By avoiding the price volatility linked to supply and demand, this partnership creates stability and security, criteria which are essential for the sustainable development of the sector.

CSR

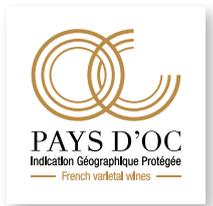
Corporate Social Responsibility helps reinvent professions and should be tackled collectively to build new alliances, bring out new solidarities and strengthen the ecosystem.

The three-year contract improves the Client-Supplier relationship. It builds a foundation of loyal and committed business partners who, in the event of a problem (either temporary or structural), will always be more inclined to trust each other.

"Show me how you treat your suppliers and I'll tell you how mature your CSR is!"



A collective diversified offer of wines for each market segment



Trade

85 % by the Trade

5,2 million hl

690 million equivalent bottles

15 % by Producers

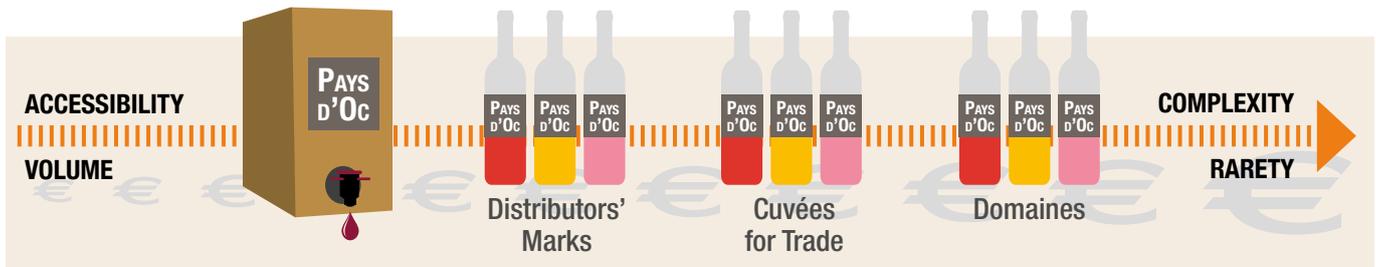
800 000 hl 120 M.eq. bottles

The diversity of the offer makes it possible to offer quality varietal wines

- ✓ At all price points
- ✓ In all packaging formats
- So can meet
- ✓ All times and styles of consumption
- ✓ All distribution channels

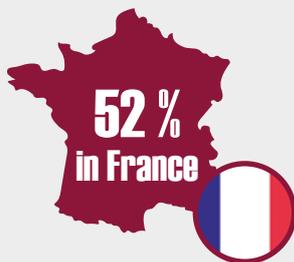


Each consumer can find a varietal Pays d'Oc wine to please



Each second, 24 bottles of varietal IGP Pays d'Oc wines are sold in the world

Because of the work of cooperatives, wineries and merchants, the IGP Pays d'Oc have acquired a wide, long term commercial presence in terms of target countries and distribution circuits.



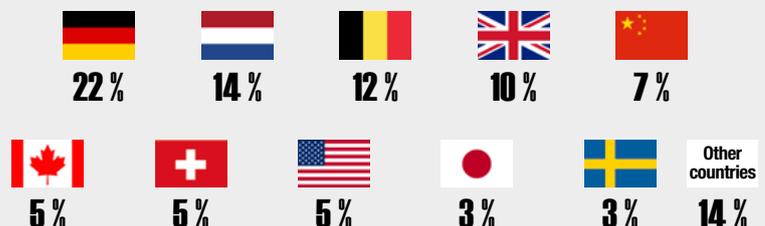
Spread of sales in France by circuit

- 56 %** Hyper-Supermarkets
- 15 %** Traditional sector
- 13 %** Direct sales
- 10 %** Hard Discount
- 6 %** Others

48 % Exported



Spread of exportations by country and their relative market share (% market share, volume per country vs total exportation of IGP Pays d'Oc wines)



Sources: Douanes / Business France / Panel IRI Worldwide / Inter Oc



A historic change: Booming varietal wines

Over the last 20 years, the set of cards has been redistributed !

In European producing countries, consumption is dropping: new, younger generations, more occasional, less numerous, are ready to be seduced and attracted as regular consumers.

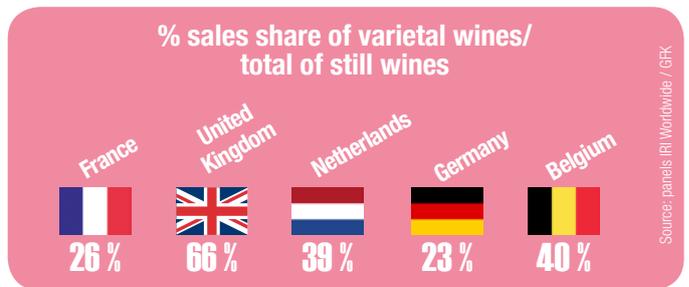
In English speaking countries, wines from the New World have strongly developed their position. Their credo: varietal wines sold under strong trade marks. With highly concentrated means of production and powerful marketing companies, the New World develops the rotation of heavily marketed wines benefiting from strong promotional campaigns.

Throughout the world, consumption is undergoing transformation: **opportunities to drink wine are multiplying**, wine is becoming more popular than in the past, **a casual approach, curiosity and discovery are ever present**. Immediate pleasure rather than the nostalgia of wines to lay down and wait for... Nevertheless, wine remains an elitist product for connoisseurs.

Varietal wines have an advantage which blended wines do not benefit from: they **train consumers' palates**, developing clearly understandable tasting references.

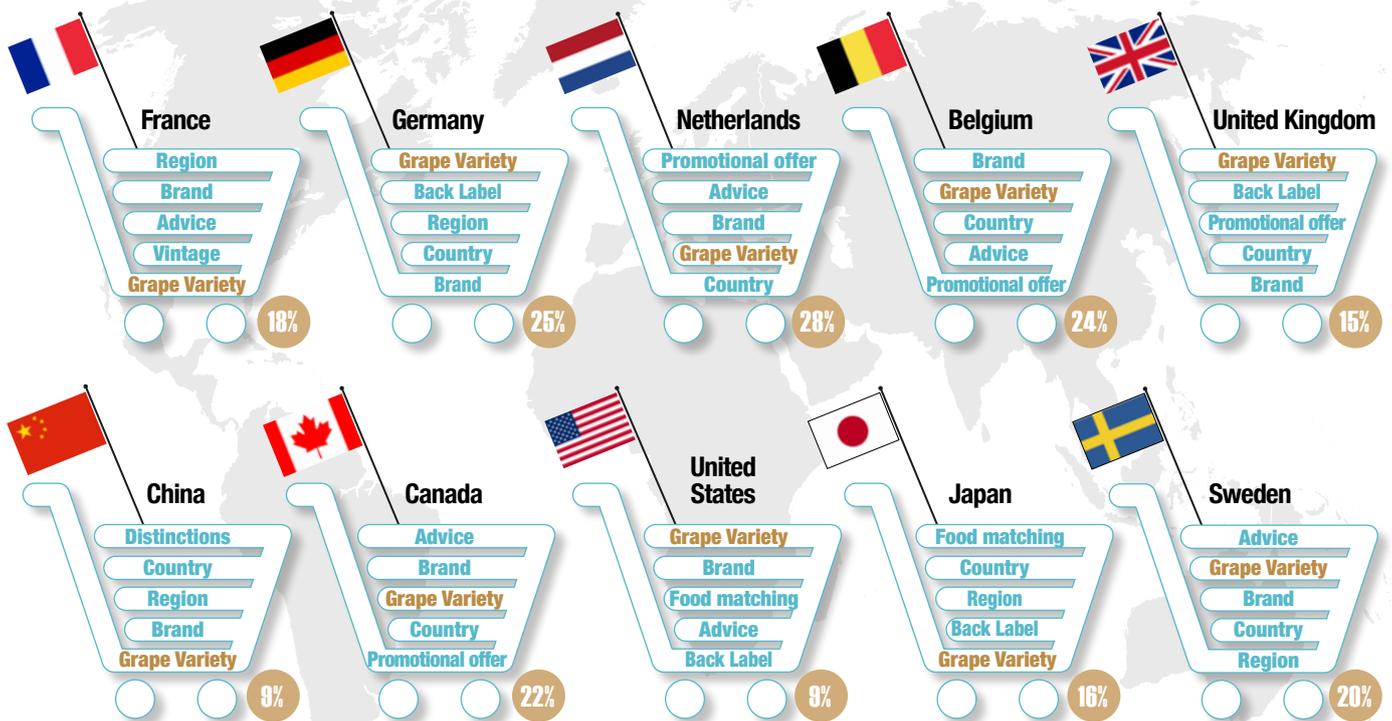
Each grape variety develops its own specific aromatic profile and key to understanding.

Sales in hyper and supermarkets represent a key indication to consumer tendencies.



Top 5 consumer buying criteria by country

Sources: Douanes / Business France / Wine Intelligence Landscapes Reports



% Market share in volume of IGP Pays d'Oc wines / total still French wines

Creative Studio for the wine sector

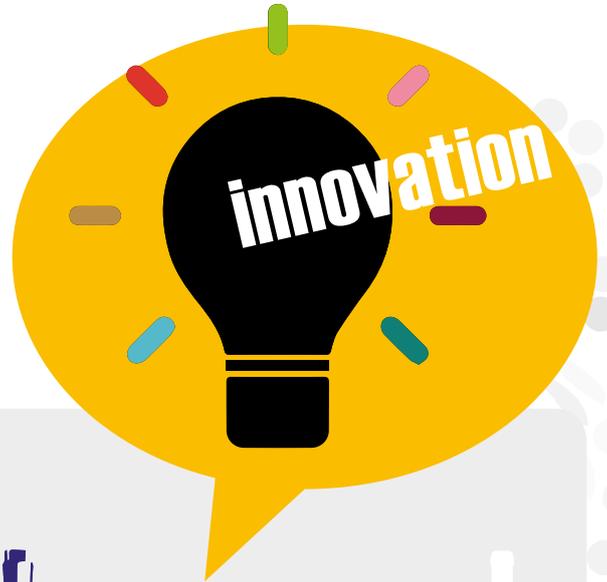


Alliance of tradition and modernity

Pays d'Oc producers and merchants capitalise on the flexibility of the IGP system to innovate constantly and diversify their commercial propositions.

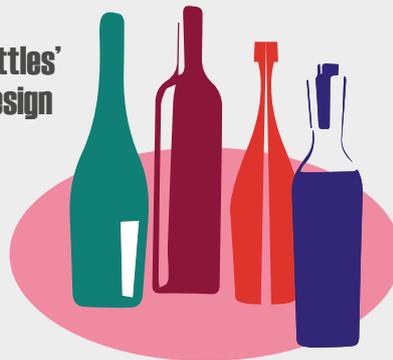
Always in movement

Over the last 10 years, our producers and marketing companies have strongly contributed to the major developments of the wine market.



Screwcaps

Bottles' design



Low alcohol wines



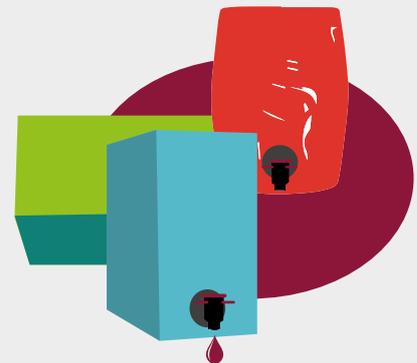
Labels

Bag in Box design



Wine pouch / Doypack

Sealed glasses



etc...

Languedoc-Roussillon's wine-growers are **highly adaptable**. Over the years and through hard times, they have evolved and gained the **capacity to anticipate** and **innovate in order to create the market of tomorrow**.



Environmental & social awareness

Permanent questioning

Having determined the need to preserve its viticultural area with respect for people, in 2009 Pays d'Oc PGI launched its sustainable development and Corporate Social Responsibility (CSR*)

programme: **Pays d'Oc Vineyard In Progress®**. VIP Pays d'Oc is divided into actions for volunteering companies (workshops, diagnostics and training) and the development of dedicated reference tools (guides).

In line with its desire to co-construct a CSR framework for the sector, **Pays d'Oc PGI has stimulated and co-facilitated the adaptation of the ISO 26000 standard for the wine sector under the aegis of AFNOR standardisation.**

The result: **the ACX30-032 agreement**, based on the CSR guidelines, specifies the issues and central questions for the wine sector and determines a framework for appropriate actions.



214 businesses have participated in the VIP Pays d'Oc programme.



Preservation of the environment

- Methods of cultivation respectful of the environment: Sustainable Agriculture, Organic, Biodynamic.
- Decreasing use of chemical input.
- Management of resources (water, energy) and control of effluents...
- Reduction of packaging directly from the supply chain (lighter bottles, optimisation of pallet use...).

Examples of social engagement

- Consideration of the multiple concerns of involved people and organisations (neighbours, consumers, suppliers, employees...).
- Constant improvement of health and security at work (management of professional risks, reduction of accidents, ergonomics).
- Improvement of inequality and precarity of employment (previsional management of work and skills, training programs, work for disadvantaged public...).
- Apprenticeship and education (alternating employment, responsible tasting practice).
- Valorisation of the regional territory (wine tourism, local economy, culture and sport...).

Example of the transversal "Win-Win" program

An independant winery commercialising 1 million bottles has reduced its packaging from its suppliers (lighter bottles, etc.).



Financial Gain for the company

**70 000 €
economy**



Gain for involved employees

**Reduction of effort
of handling**



Gain for the planet

**Improvement of
the carbon footprint**
500 000 km equ. less carbon

Proactivity of professionals

of the Pays d'Oc is to be found in several domains: Organic wines, Biodynamic viticulture, sustainable viticulture, resistant grape varieties, Social Responsibility of companies (RSE), innovations in packaging, wines with low levels of alcohol, sulphites...

Future objectives



Develop the IGP Pays d'oc economic sector with sustainable viticulture ensuring individual prosperity in a preserved environment

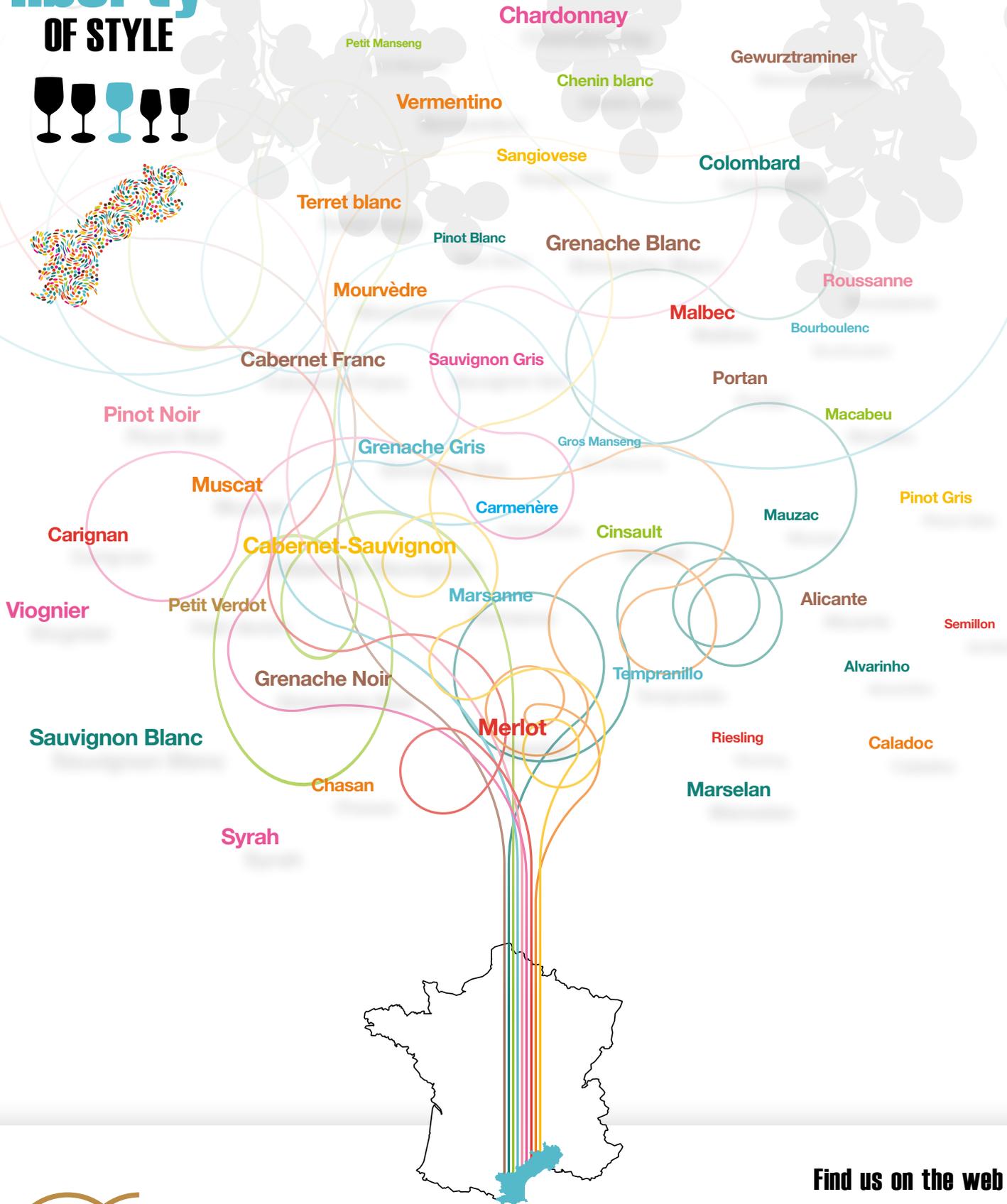
Resistant grape varieties
A concrete response for many major issues of society and a collective project for the industry. In collaboration with the regional Chambers of Agriculture for technical expertise and the young farmers' union, resistant grape varieties represent a major innovation for our vineyard ; reduction of the use of phytosanitary products and an improvement in the stability of production (in volume and quality).

Strengthening of commercial relations between producers and their clients
via the development of triennial commercial contracts: an essential element for the economic development of concerned companies.

Strengthening our brand awareness by communicating with our distributors and consumers:
the consumption of varietal wines with guarantees of origin and quality, wines which keep their promise, with complete transparency.



liberty OF STYLE



PAYS D'OC
Indication Géographique Protégée
— French varietal wines —

Interprofession des Vins Pays d'Oc IGP
Syndicat des Producteurs de Vin de Pays d'Oc

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