

liberty
OF STYLE



Varietal Wines Certified Origin and Quality

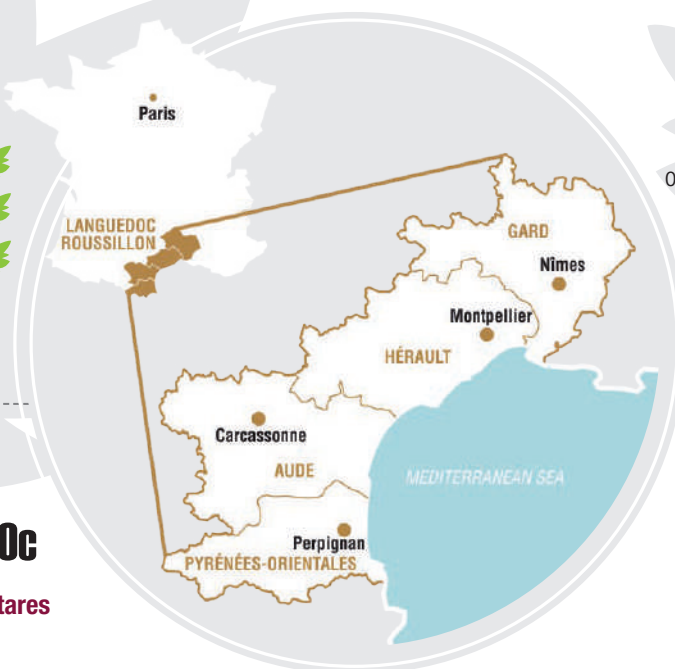


- A region of family vineyards
- Character & climate
- Certified origin and quality label
- Broad range of varietal wines
- Guaranteed sourcing
- A collective diversified offer
- Booming varietal wines
- Creative studio
- Environmental and social awareness
- Future objectives

2022



240 000 hectares



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



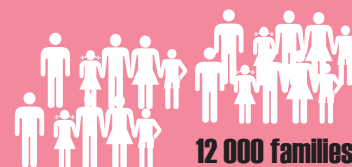
**Cultivated
by**



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



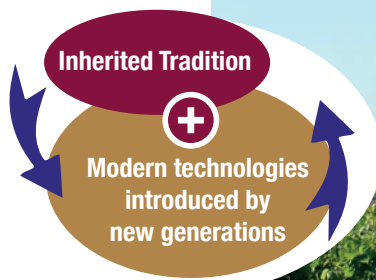
- **12 000** vine growers supply cooperatives



12 000 families

- 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 **38 150 hectares certified** representing 1 hectare out of 10 and an annual production estimated at **1,2 million hl**.



IGP Pays d'Oc BIO wines:

1st French BIO production: 680 000 hl or 91 million

bottles produced by 150 privately owned wineries & 38 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



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

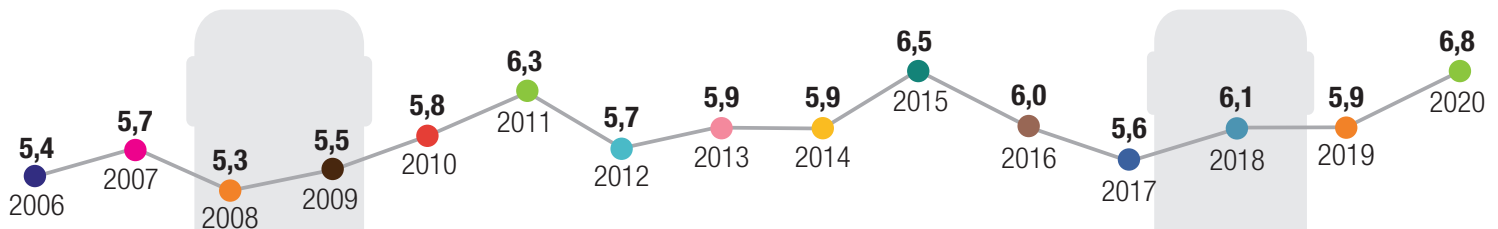


Broad range of varietal wines

Certified Quality and Origin



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



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

red

45%

3 M. hl = 409,8 million

Merlot	1 258 888 hl
Cabernet-Sauvignon	840 909 hl
Syrah	369 498 hl
Générique Rouge	180 023 hl
Pinot Noir	155 274 hl
Grenache Noir	90 580 hl
Marselan	69 095 hl
Cabernet Franc	37 335 hl
Malbec	24 065 hl
Carignan Noir	20 164 hl
Alicante H. Bouschet	11 085 hl
Mourvèdre	8 111 hl
Petit Verdot	3 130 hl
Caladoc	2 524 hl
Cinsault	1 736 hl
Nielluccio (Sangiovese)	326 hl
Tempranillo	239 hl
Portan	149 hl

white

25%

1,7 M. hl = 228,1 million

Chardonnay	837 142 hl
Sauvignon Blanc	479 815 hl
Viognier	149 277 hl
Générique Blanc	66 460 hl
Grenache blanc	43 005 hl
Muscat Petits grains	35 188 hl
Rolle	31 841 hl
Colombard	25 050 hl
Marsanne	10 638 hl
Muscat d'Alexandrie	6 166 hl
Gewurztraminer	5 365 hl
Roussanne	4 988 hl
Terret blanc	4 976 hl
Mauzac	3 485 hl
Pinot Gris	2 488 hl
Chenin	1 419 hl
Riesling	682 hl
Sauvignon Gris	603 hl
Pinot Blanc	532 hl
Alvarinho	390 hl
Chasan	363 hl
Semillon	235 hl
Grenache Gris	218 hl
Macabeu	56 hl
Bourboulenc	25 hl

rosé

30%

2 M. hl = 272,9 million

Grenache Noir	557 017 hl
Cinsault	431 128 hl
Syrah	386 830 hl
Générique Rosé	302 612 hl
Merlot	244 545 hl
Pinot Noir	37 924 hl
Grenache Gris	23 870 hl
Cabernet Franc	21 378 hl
Cabernet-Sauvignon	20 127 hl
Marselan	9 665 hl
Caladoc	4 670 hl
Pinot Gris	2 486 hl
Malbec	1 818 hl
Mourvèdre	1 399 hl
Petit Verdot	1 045 hl
Sauvignon Gris	160 hl
Muscat de Hambourg	86 hl



1st French IG

For the production of Rosé
(34% 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*:

*Five-year average



6,1 million hl



817 million equivalent bottles



5,3 million hl

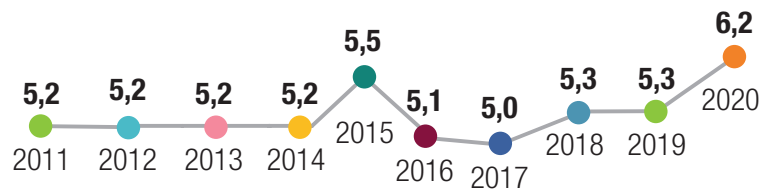


707 million equivalent bottles



Wine merchants buy 87 % of the production in bulk to supply their needs for trade marks in varietal wines.

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

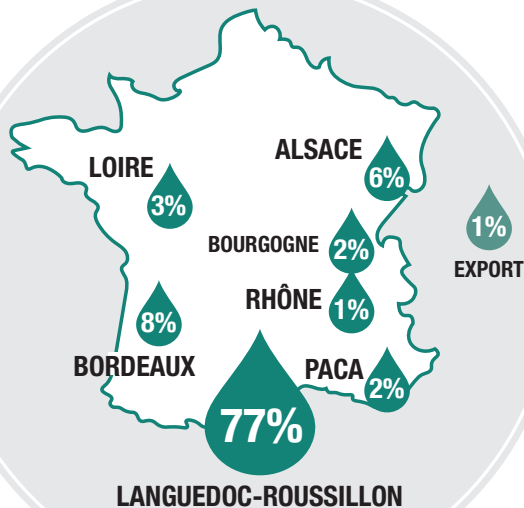


Source: Bulk Contracts / Inter Oc

Geographic spread of merchant customers

77% of wines are bought in bulk by merchants of the Languedoc-Roussillon

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 530 000 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

87 % by Wine Merchants

5 100 000 hl

680 M.eq. bottles

13 % by Producers

800 000 hl

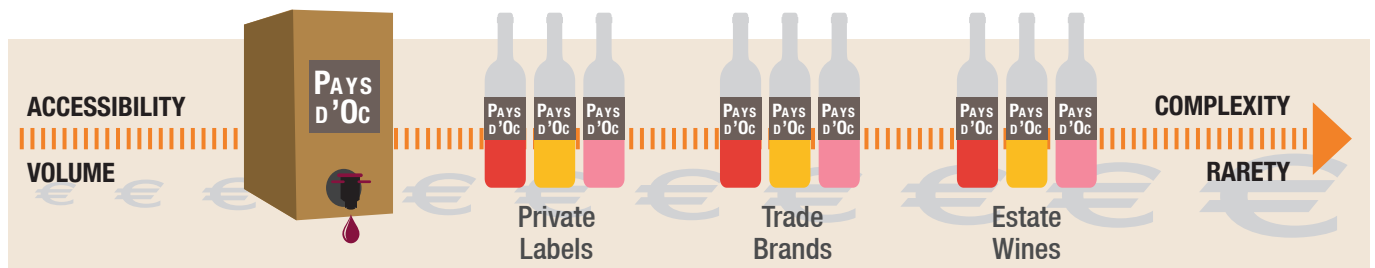
104 M.eq. bottles

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

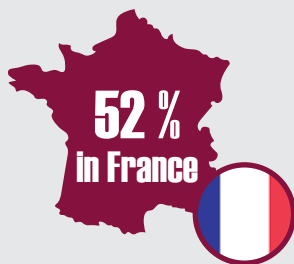


Each consumer can find a varietal Pays d'Oc wine to please



Each second, 25 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.



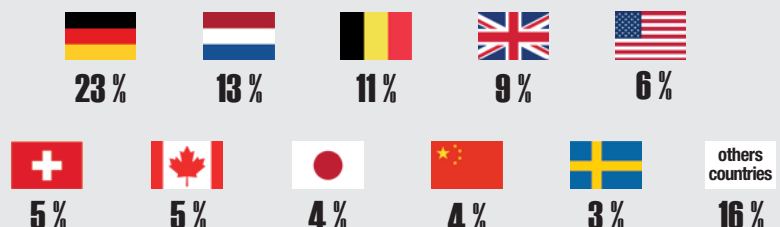
**Spread of sales in France
by circuit**

- 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)



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.

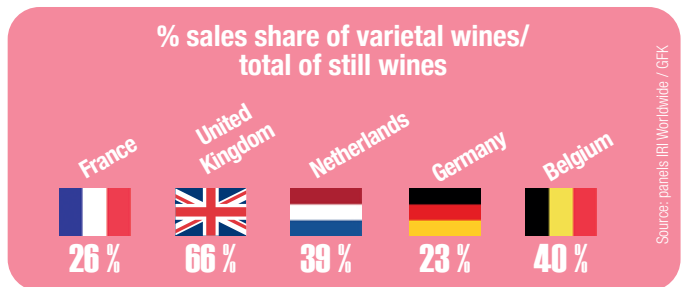
In English speaking countries, wines from the New World have strongly developed their position. Their credo: varietal wines sold under strong trade marks. With highly concentrated means of production and powerful marketing companies, the New World develops the rotation of heavily marketed wines benefiting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

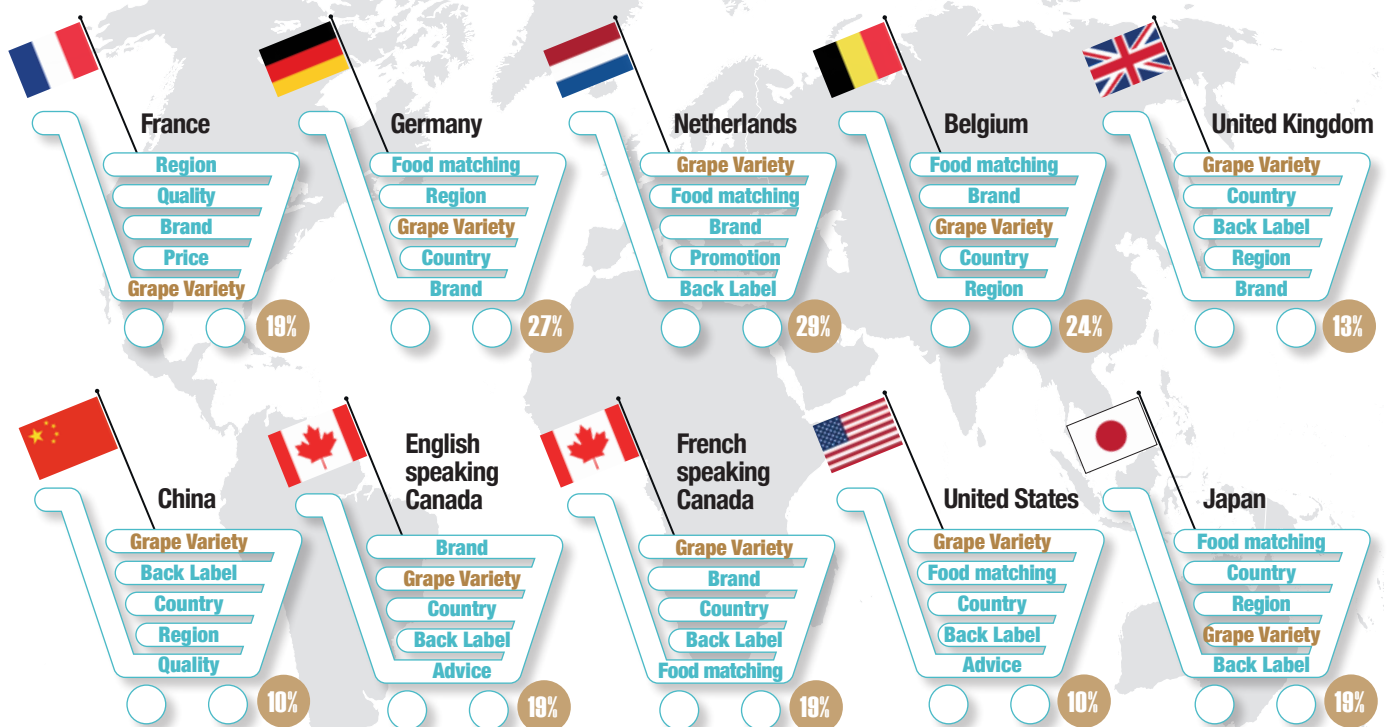
Each grape variety develops its own specific aromatic profile and key to understanding.

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



Quality Indicators = AOP, IGP, Reserve, Medals...

% 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

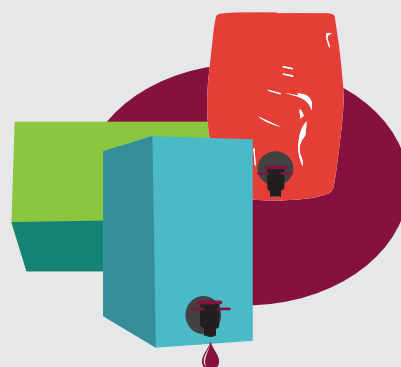


Low alcohol wines



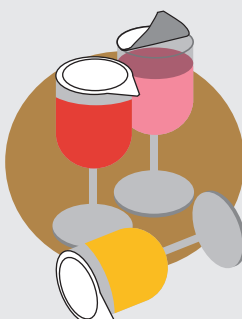
Labels

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.



350 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 domaines: 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



Establish the Strategic Regional Plan for the wine industry with all stakeholders of the Occitanie Region to promote value creation and sharing by meeting the expectations of consumers and society through practices that respect the environment and placing a responsible corporate approach at the heart of the project.

Corporate Social Responsibility

- Initiate and promote change in farming and production practices based on the High Environmental Value and the organic sector
 - Develop research and innovation to bring sustainable technical solutions
- Optimize models of competitiveness adapted to all the economic models of wines under signs of quality through research
 - Develop the implantation of resistant grape varieties

Strengthening of commercial relations between producers and their clients

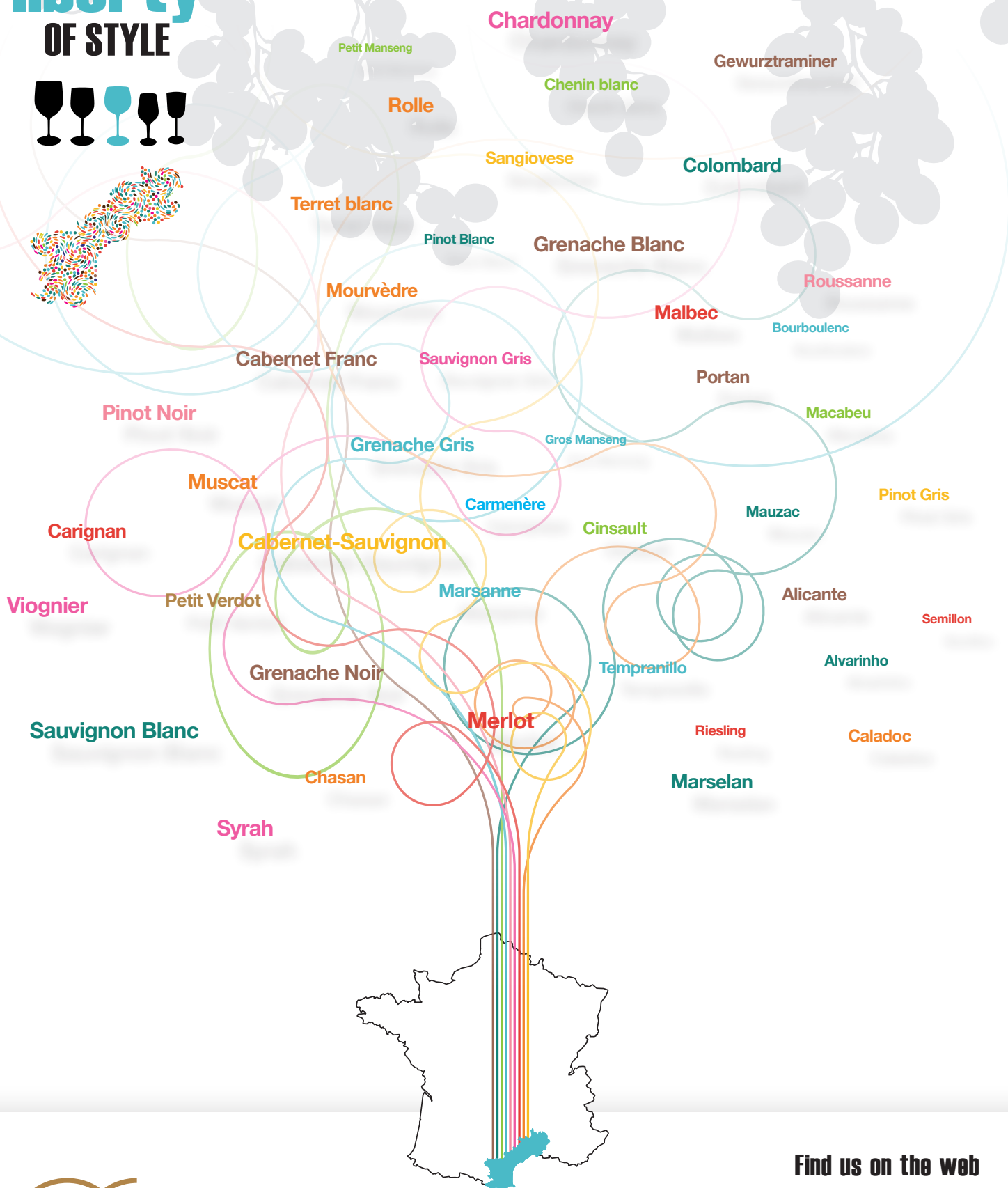
via the development of triennial commercial contracts: an essential element for the economic development of concerned companies.

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
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