

liberty
OF STYLE



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

Varietal wines
Key Figures



Pays d'OC IGP: Key figures

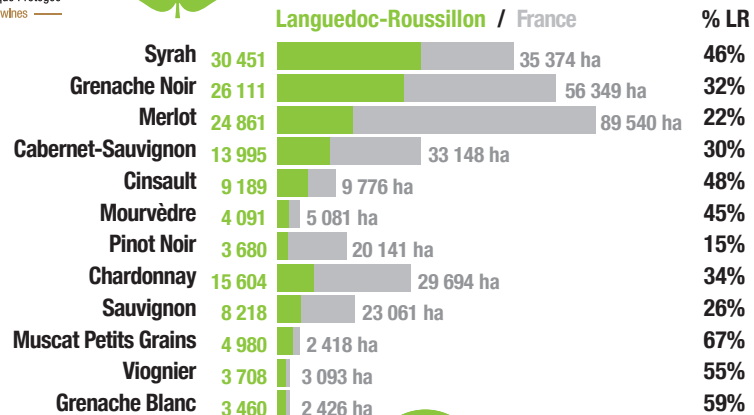
The Languedoc-Roussillon Vineyard

240 000 hectares in the Languedoc-Roussillon

120 000 hectares producing PGI Vins Pays d'Oc



Grape Varieties surfaces (hectares)



Producers

930
Independent Producers

150
Cooperative Cellars



Certification

6,8 million HL

910,7 million equivalent bottles

100%
• of wines controlled by tasting
• of operators controlled

45%
✓
17 varieties

30%
✓
16 varieties

25%
✓
24 varieties



2

3

4

5

6

7

french leader



for quality varietal wines

1st French GI* for Export
1st GI* in France

* GI: Geographical Indication

25 **1s**



25 bottles of PGI Pays d'Oc sold in the world each second



Marketing

52% in France

48% Exported (170 countries)



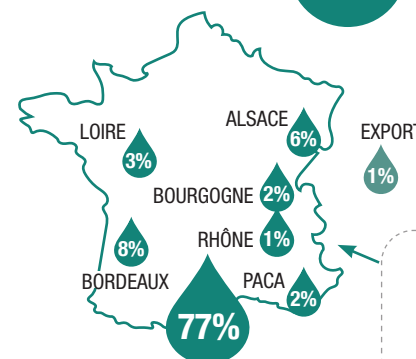
Brands & Wines



Wine merchants



Independent producers



LANGUEDOC-ROUSSILLON

- The regional trading buys **77%** of volumes
- French distributors use fully traced PGI Pays d'Oc wines to create their varietal brands.

€ Sales

784 million eq. bottles
65 million 9l. cases

bulk trade 87%

of the production is bought by the trade :
315 wine merchants
51% via agents
70 agents & sales agents

direct Sales 13%

of the production is commercialised directly by cooperative cellars and independent producers

5 100 000 hl
680 million d'eq. bottles
800 000 hl
104 million eq. bottles

Pays d'OC IGP production in figures



6,8 M. hl = 910,7 million



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

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
Caladoc	4 670 hl
Marselan	9 665 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

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

ORGANIC

10%



680 000 hl = 90 million



42%



34%



24%



1st French Rosé Producer
(34% market share)

1st

French PGI

in Supermarket / Hypermarket distribution
in France
20% market share





super/hypermarket distribution

1 800 000 hl = 240 million



off-license/restaurant

600 000 hl = 80 million



direct Sales

400 000 hl = 53 million



hard discount

300 000 hl = 40 million

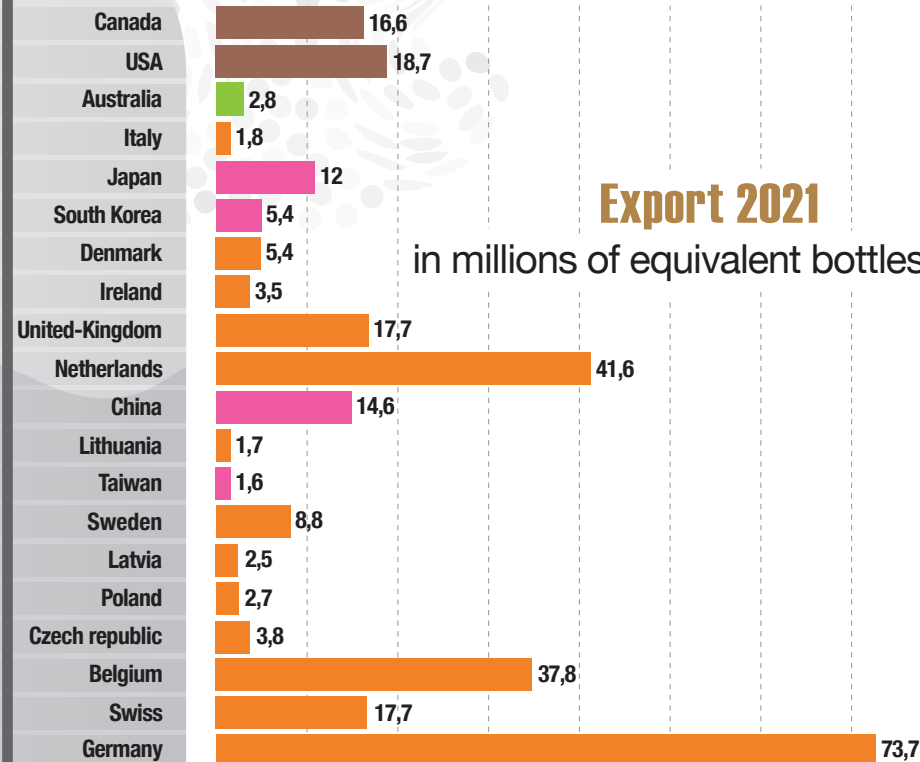
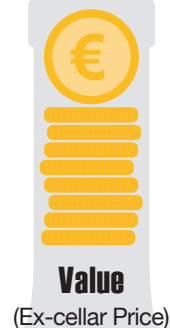
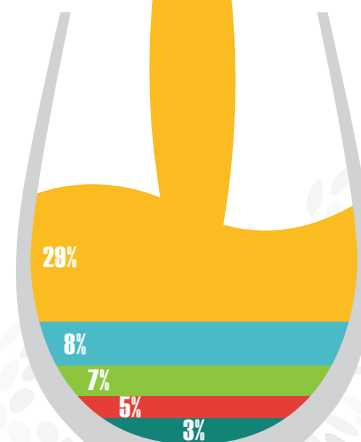
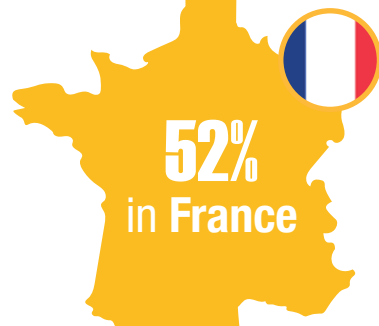


other channels

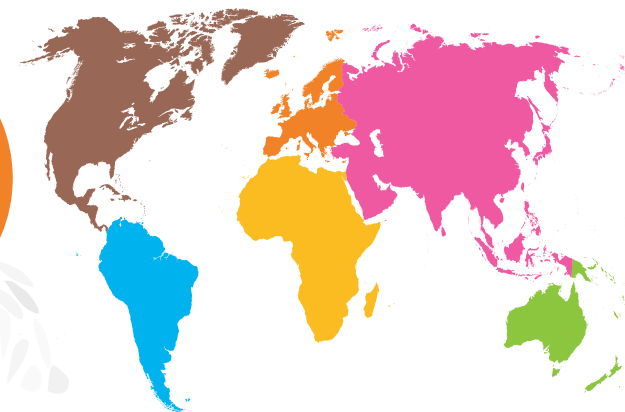
200 000 hl = 27 million



Pays d'OC IGP Varietal Wines: markets



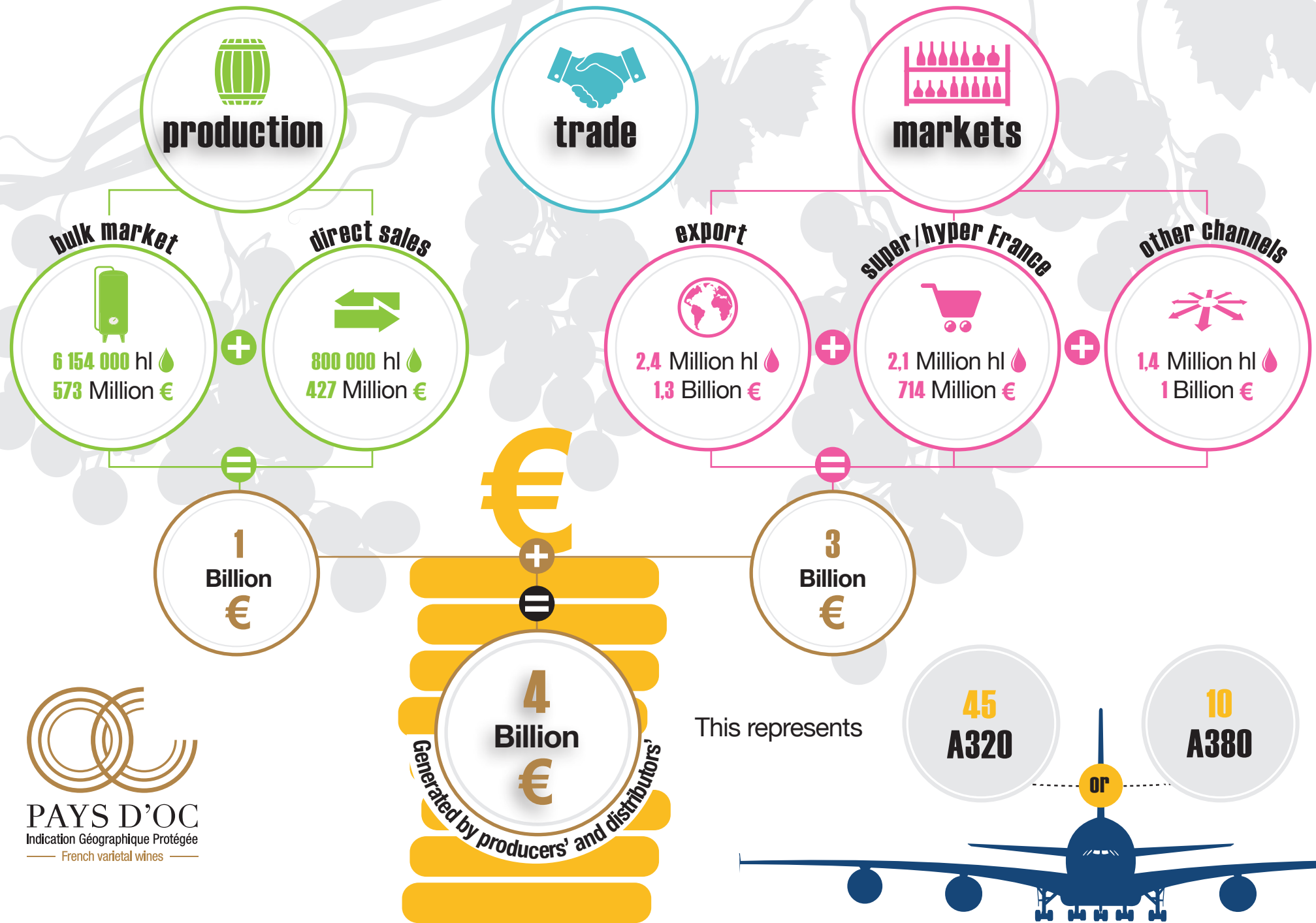
48%
Exported



Export 2021

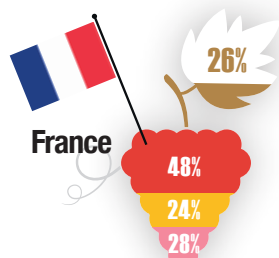
in millions of equivalent bottles 75cl

Pays d'OC IGP Sales figures



Grape variety: a key reference for consumers

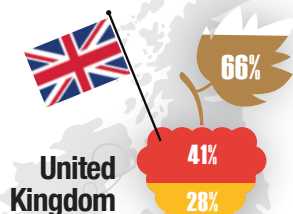
% Varietal wines market share



Merlot
Cabernet-Sauvignon
Pinot Noir
Gamay
Syrah
Grenache
Cabernet franc
Cinsault
Malbec
Carignan
Mourvèdre

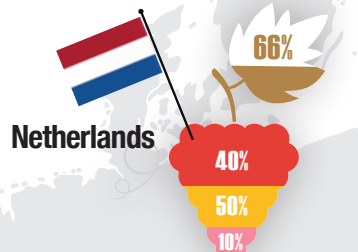
Bi-cépages
Cinsault
Cabernet d'Anjou
Merlot
Grenache / Garnacha
Syrah / Shiraz

Chardonnay
Sauvignon blanc
Riesling
Pinot Gris / Pinot Grigio
Gewurztraminer
Clairette
Viognier
Muscat / Moscato
Chenin Blanc



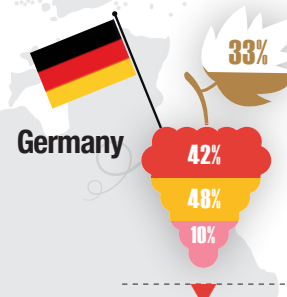
Merlot
Cabernet-Sauvignon
Malbec
Syrah / Shiraz
Pinot Noir
Tempranillo
Zinfandel
Pinotage
Grenache
Sangiovese

Sauvignon blanc
Pinot Gris / Pinot Grigio
Chardonnay
Chenin blanc
Pinot blanc
Riesling
Sémillon
Viognier
Gewurztraminer
Muscat / Moscato
Colombard
Verdejo
Albariño



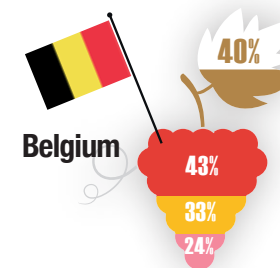
Merlot
Cabernet-Sauvignon
Pinot Noir
Syrah / Shiraz
Tempranillo
Malbec
Pinotage
Grenache / Garnacha
Zinfandel
Carménère
Sangiovese

Chardonnay
Sauvignon blanc
Pinot Gris / Pinot Grigio
Riesling
Muscat / Moscato
Chenin blanc
Verdejo
Grüner Veltliner
Gewurztraminer



Dornfelder
Merlot
Cabernet-Sauvignon
Pinot Noir
Syrah / Shiraz
Tempranillo
Zinfandel
Sangiovese
Pinotage
Malbec
Grenache

Riesling
Chardonnay
Pinot Gris / Pinot Grigio
Müller-Thurgau
Sauvignon Blanc
Grüner Veltliner
Gewurztraminer
Muscat / Moscato
Chenin blanc
Verdejo
Sémillon
Viognier



Merlot
Cabernet-Sauvignon
Pinot Noir
Syrah / Shiraz
Grenache / Garnacha
Malbec
Tempranillo
Gamay
Sangiovese
Carménère
Pinotage

Chardonnay
Pinot Gris / Pinot Grigio
Sauvignon blanc
Riesling
Gewurztraminer
Chenin blanc
Muscat / Moscato
Viognier
Sémillon

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

TOP 5
choice cues
when buying
wine

Region
Quality Indicator*
Brand
Price
Grape Variety

Grape Variety
Country
Back label
Region
Brand

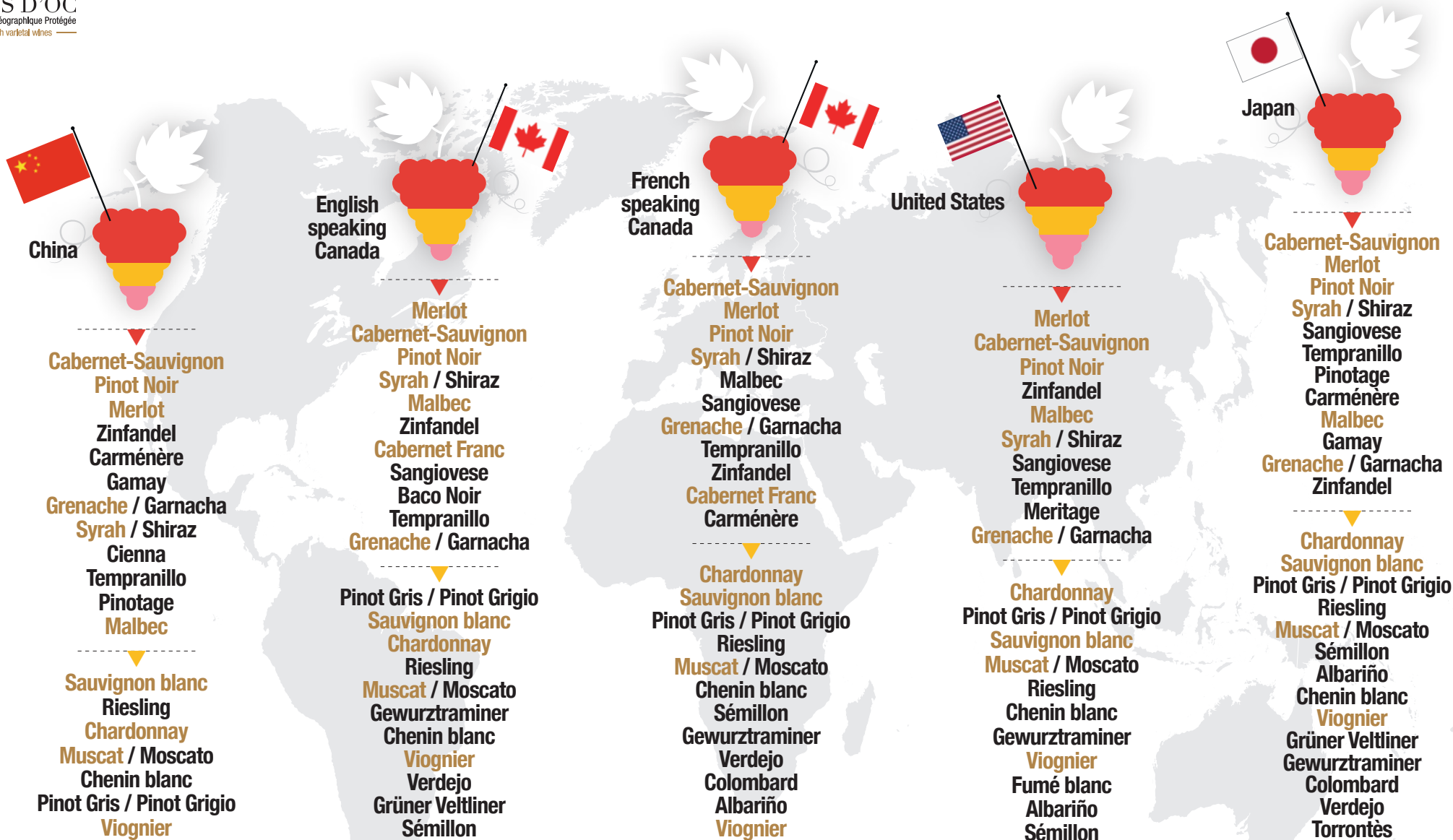
Grape Variety
Food Matching
Brand
Promotion
Back label

Food Matching
Region
Grape Variety
Country
Brand

Food Matching
Brand
Grape Variety
Country
Region

Grape variety: a key reference for consumers

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



TOP 5
choice cues
when buying
wine

Grape Variety
Back label
Country
Region
Quality

Brand
Grape Variety
Country
Back label
Advice

Grape Variety
Brand
Country
Back label
Food Matching

Grape Variety
Food Matching
Brand
Back label
Advice

Food Matching
Country
Region
Grape Variety
Back label

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Viognier

Carignan

Muscat

Pinot Noir

Cabernet Franc

Mourvèdre

Terret blanc

Rolle

Petit Manseng

Gewurztraminer

Chardonnay

Chenin blanc

Sangiovese

Pinot Blanc

Sauvignon Gris

Grenache Gris

Gros Manseng

Carmenère

Cinsault

Marsanne

Grenache Noir

Petit Verdot

Sauvignon Blanc

Chasan

Syrah

Alicante

Grenache Blanc

Tempranillo

Riesling

Marselan

Malbec

Colombard

Roussanne

Bourboulenc

Portan

Macabeu

Mauzac

Pinot Gris

Semillon

Alvarinho

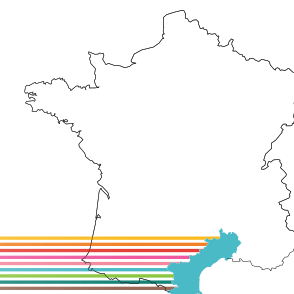
Caladoc



PAYS D'OC

Indication Géographique Protégée

French varietal wines



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