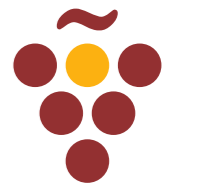


A UNIFIED NARRATIVE FOR SPANISH WINE



A UNIFIED
NARRATIVE
— FOR —
SPANISH
WINE



Interprofesional del
VINO
DE ESPAÑA

Index

06 Foreword

08 Introduction

OIVE Strategic Plan / 08

12 The importance of wine in Spain

14 ¿Why a unified narrative for Spanish wine?

The unified narrative: a promotional tool / 14

MARKETING TIPS (brand creation) / 15

16 The messaging strategy for Spanish wine

QUALITY / 18

DIVERSITY / 20

HISTORY / 22

LIFESTYLE / 23

SUSTAINABILITY / 26

28 Communicating the core message

32 Participants and acknowledgements

Foreword

This document is aimed at all those involved in production, marketing and communication in the Spanish wine sector and seeks to craft a cohesive narrative based on the attributes, distinct qualities and values of the Spanish wine sector. The goal is for it to become a source of inspiration for all the initiatives that the stakeholders across the wine value chain are developing in international markets and for all of us to create an image of Spain as a unique and value-adding wine producer. Each of us and the bottles of wine we bring to 189 countries around the world are the best ambassadors of the “Spanish wine” brand.

To this end, first of all, we will provide a summary of the reasons why this unified narrative is necessary, explaining where and how the narrative fits into the sector's strategic plan, promoted by the Spanish Interprofessional Wine Organisation (OIVE),

as well as the importance of the wine sector for the country's economy and society. Subsequently, we will outline the attributes of Spanish wine, forming the basis for a shared discourse.

Lastly, we will cover the most frequently asked questions and provide a series of tools to maximise the practical use of this narrative.

Naturally, we would also like to thank the members of the working group created for this purpose as part of “Mesa de la Gastronomía” for their guidance and work, as well as the member organisations of the OIVE and ICEX (Food and Wines from Spain) for their vital help in promoting this project.



Each of us and the bottles of wine we bring to 189 countries around the world

are the best
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Strategic Plan for the Spanish Wine Sector

The Strategic Plan for the Spanish wine sector 2022-2027, promoted by the OIVE, was presented in July 2022. The document is the result of an exhaustive research and analysis process with the participation and consensus of all the stakeholders in the sector. This plan defines the mission and vision of the Spanish

wine sector. In order to fulfil them, it includes five main lines of action focused on improving the image and functioning of the sector, as well as **increasing the value of our products in various markets.**

Vision



To position Spain as a national and **international leader in the wine sector**, based on its unique and distinctive qualities: **quality, diversity, history, tradition, sustainability and modernity.**

Mission



To protect, promote and ensure awareness, the image and the quality of Spanish wine products for both domestic and international consumers.



To establish Spain as a global **leader in sustainability across all areas:** environmental, social, economic, historical, cultural and scenic.



To generate value and profitability, mainly in international markets, leveraging unique attributes and ensuring their fair and sustainable distribution throughout the entire chain.



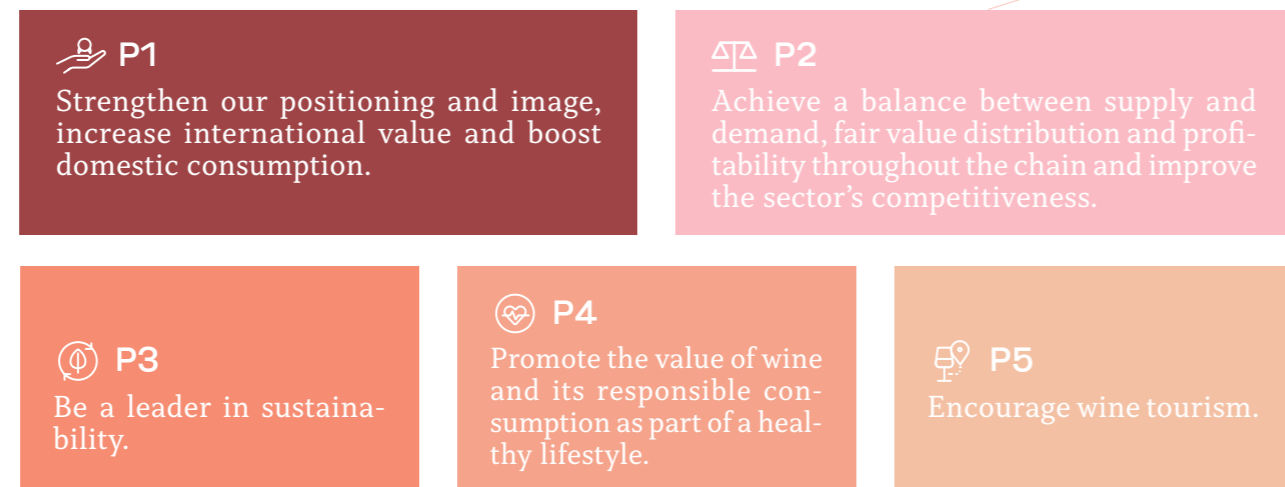
To facilitate the development and transmission of innovation and digitalisation, attracting and retaining the best talent to secure the sector's future.



To raise awareness in society and consumers about Spanish wine as a link to territorial, social and economic development, as well as an inseparable part of our history, Mediterranean culture, a healthy lifestyle and moderate and responsible consumption.

Main pillars

MAIN PILLARS



CROSS-CUTTING PILLARS



COMPLEMENTARY PILLARS



22
STRATEGIC
INITIATIVES

101
ASSOCIATED
ACTIONS

The development of the defined strategic lines of action will enable Spain to position itself as a world leader in the wine industry and drive a beneficial cycle of value creation throughout the sector.

The strategic axes include 22 strategic initiatives with 101 associated actions based on the unique and differentiating characteristics of Spanish wine: quality, diversity,

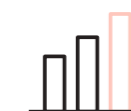
history, tradition, sustainability and modernity.

The exercise of creating a unified narrative for Spanish wine forms part of the first axis and is considered a major part of shaping how our product is viewed globally. This is based on the aforementioned unique and differentiating characteristics.



Strategic Plan

It defines the mission and vision of the Spanish wine sector. In order to fulfil them, it includes five main lines of action focused on improving the image and functioning of the sector, as well as increasing the value of our products in various markets.



The development

Of the defined strategic lines of action will enable Spain to position itself as a world leader in the wine industry and drive a beneficial cycle of value creation throughout the sector.



The importance of wine in Spain

The wine sector makes a significant contribution to the Spanish economy in terms of GDP and employment, as is its role regarding the performance of the foreign sector, the social aspect and the management of the challenges in terms of environmental sustainability.

The Spanish wine sector is a world leader. Spain accounts for 13% of the global vineyard surface area, 15.3% when it comes to organic vineyards and is the third-largest wine producer in the world (Source: AFI 2023 study).

Data from Spanish wine sector

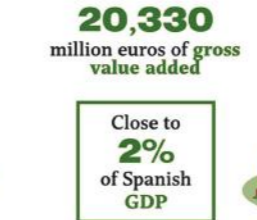
SURFACE



EMPLOYMENT



ECONOMY



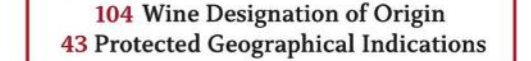
ATTRACTION OF WEALTH IN SMALL MUNICIPALITIES



PRODUCTION



QUALITY AND DIFFERENTIATION



INTERNATIONALIZATION



*Data from the report on the economic and social relevance of the wine sector in Spain, 2023. (Analistas Financieros Internacionales, AFI)

There are currently 104 Designations of Origin (DOs) and 43 Protected Geographical Indications (PGIs) in Spain, with a total of over 4,000 registered wineries. These wineries are spread throughout the country and their wines demonstrate the diverse range of soils, climates and types of grapes available there (Source: MAPA).

Spain has even established itself as one of the largest wine exporters in the world, being the third-largest exporter in value and the second largest in terms of volume. In fact, annual sales abroad exceed three billion euros and two billion litres.

But, beyond the figures, the importance of wine in Spain is clear to see from the mark it has left on our culture, history and traditions, among other aspects. One example of this is the prominence of wine in our gastronomy and our culture of enjoyment, which are also a major draw for tourism. As are the villages and landscapes that the sector helps to protect.



Why a narrative for Spanish wine?

THE UNIFIED NARRATIVE: A PROMOTIONAL TOOL

What Spanish wine has to offer unique and distinctive and we must strive to enhance its value in order to guarantee the sustainability of the sector. The first step is to understand everything it represents, to become aware of it, to transform it into a coherent and consistent collective discourse.

How can we do this?

Revaluing the product requires multiple levels of action. Firstly, it is a matter of building a **country brand** based on common pillars as agreed upon within the sector. A discourse through which Spain is positioned in the international consciousness as a country with quality wines.

Among the **benefits that the narrative could bring**, the following are worth mentioning:

- **Added value:** the values associated with the country of origin are automatically reflected in the wine being sold.
- **Coordination:** institutions and wineries would be involved in this process, which would require and facilitate greater sectoral coordination. However, the wineries and their sales teams around the world would be the main protagonists, using the agreed messaging strategies in their international promotion.

They would also be the greatest beneficiaries, since the Spanish wines brand that they would help to generate would provide ever greater added value to their products.

- **Accessibility:** a clear, well-defined and widespread image of our wines would make them more accessible to any international client or consumer. Therefore, the “Spain brand” would instil the product with a set of qualities that would be further enhanced by showcasing particular regional characteristics.

★ BRAND BUILDING TIPS

To build a brand that brings value it is necessary to work in three main areas: strategy, identity and activation.

Strategy: Medium/Long-Term Strategic Vision. Having a well-defined and developed brand strategy provides focus and direction, creates a discourse of its own and serves as a roadmap for the future, with an eye on social, economic and technological trends. Who am I going to target? Who are my competitors?

Identity: A brand purpose that endures over time. It is about establishing what is known as a “Unique Selling Proposition” (USP). A USP defines you, while setting your brand apart from others; the values, qualities and benefits that make your brand or company unique.

Activation:

• **Internally: shared leadership and commitment** are key. A company's regular activities are the main way to build a brand. The brand should be felt at every level of the organisation, with the entire team, at all levels, acting as “brand ambassadors”, reflecting its purpose and values.



To position Spain in the international consciousness as a country with quality wines

- **Externally:** initiatives, plans and actions that may be necessary **to build the brand image and experience we want**, in line with the strategy.

Successful brand building is the result of tenacious work with a global vision and the ability to act in a coordinated manner. It is a long-distance race that requires focus, rigour, perseverance, leadership and determination, all of which are demanding qualities.

The messaging strategy for Spanish wine



Quality



Diversity



History



Lifestyle



Sustainability





QUALITY

In the world of wine, Spain stands out as a country of opportunity and innovation, with our drive enabling us to perfect and modernise our product.

Innovation in Winemaking Techniques

Spain is not content with tradition; it also embraces innovation in winemaking techniques. From the introduction of modern winemaking methods to the adoption of advanced technologies, the **Spanish wine sector is constantly evolving** to improve the quality and consistency of its wines.

Specialisation and Craftsmanship

Each wine region in Spain specialises in the growing of specific grape varieties and unique winemaking techniques. This specialisation, alongside the craftsmanship and meticulous approach of the grape growers and wine

makers, results in wines of exceptional quality that **reflect the character and identity of their place of origin.**

Commitment to Excellence

Spain embraces an unwavering commitment to excellence at every stage of wine production. From the meticulous selection of grapes to winemaking and ageing practices, **the sector is constantly striving to achieve higher levels of quality.**

Rigour in Control and Traceability

Spain's Denominations of Origin (DOs) and Protected Geographical Indications (PGIs) are leaders in the implementation of strict quality and traceability controls. **Each bottle of Spanish wine guarantees its origin and quality,** offering consumers a reliable and satisfying experience.

SOME OF OUR CREDENTIALS

Wine Spectator

- ❖ Ranking of the world's best wines by quality, price and availability.
- ❖ **Around ten Spanish wines** commonly feature in this annual ranking.
- ❖ **Two have ranked in the top ten** in the last five years.



- ❖ Tim Atkin's wine rating (100-point scale).
- ❖ **Over 200 Spanish wines** with ratings of **over 95 points.**

Decanter

- ❖ Ranking of classic wines, unconventional wines and wines which are outstanding value for money.
- ❖ Spain has **four wines** in the ranking "Wines of the Year 2023: **Classics category**".
- ❖ **Two wines** in "Wines of the Year 2023: **Value category**".
- ❖ **One wine** in "Wines of the Year 2023: **Off-beat category**".



- ❖ Falstaff rating (100-point scale).
- ❖ **Two wines** with the **maximum score** of 100 and **20 wines** with scores of **95 or higher.**
- ❖ **30 Spanish wines** in the **top 150.**



- ❖ Parker Points wine ranking (100-point scale).
- ❖ Rated based on five factors: aroma, flavour, structure, complexity and ageing potential.
- ❖ **27 Spanish wines** with the highest possible score (**100 points**).



- ❖ James Suckling awards 15 points for colour, 25 points for aroma, 25 points for structure and 35 points for the wine's overall impression.
- ❖ **Three Spanish wines** with a **maximum rating** of 100 and **32** with scores of **95 or higher.**

KEY FACTS

- ❖ Spain has the **largest vineyard surface area in the world** (944,000 ha).
- ❖ Spain has **104 PDOs and 43 PGIs**.
- ❖ **97%** of the vineyard surface area in Spain is located within the **territory of a PDO**.
- ❖ **Over 120** municipalities specialise in viticulture.
- ❖ **More than 40%** of Spanish municipalities are home to vineyards.
- ❖ The sector has invested **€200M in R&D&I in the last five years**.
- ❖ This represents **25% of the total investment** in R&D&I in the agri-food sector.
- ❖ Holographic anti-counterfeiting labels, back labels and seals have been in use **since 1970**.
- ❖ New technologies such as **NFC and the Internet of Things** are being adopted by the sector to improve traceability and enhance quality controls.
- ❖ The second-largest exporter in the world by volume:
 - **13%** of **total wine** exports globally
 - **16%** of **sparkling wine** exports globally
 - **13%** of **bottled wine** exports globally
- ❖ Significant increase in presence in **premium and ultra-premium segments**.

DIVERSITY

In Spain's vast winemaking landscape, diversity is a defining feature that shapes the richness and complexity of its wines. From the soils, climates and environments to the diversity of wineries, grape growers and grape varieties, each wine region offers a unique and distinctive experience.

Richness of Soils and Climates

Spain is a country of extraordinary geographical richness, providing a great diversity of soils, climates and environments where vines are grown. From the high mountains of the Pyrenees to the warm plains of Andalusia, each wine-growing region offers a unique landscape that influences the character and quality of its wines.

These different areas provide a varied backdrop for Spanish viticulture, enabling the production of **a wide range of wines that reflect the uniqueness of each region**.

Multiple Grape Varieties

Spain has 235 recognised grape varieties for winemaking, of which 150 are indigenous. However, at least 350 more unrecognised varieties exist, some of which are in the process of recovery.

This diversity means that each region has its own unique offering, generating the **wide range of flavours, aromatic profiles and types of wine that Spain is known for**.

Wineries: A Variety of Styles and Traditions

From small family wineries to large wine companies, the diversity of wineries in Spain is remarkable. Each brings its own unique approach, from traditional techniques to cutting-edge methods, resulting in **a rich variety of winemaking styles and approaches**.

Denominations of Origin and Protected Geographical Indications (PDOs and PGIs)

Spain's PDOs and PGIs attest to the country's diversity, representing a wide variety of regions and wine styles. From the most prestigious denominations to emerging ones, each of them offers a **unique and authentic wine experience**.

KEY FACTS

- ❖ Spain has **over 4,000 wineries, more than 500 cooperatives and over 560,000 grape growers**.
- ❖ **Over 150 indigenous grape varieties** planted.
- ❖ Present in **189 countries**, with **over 2.6 billion litres** of wine products exported.
- ❖ Spain is one of the **most mountainous countries in Europe**. This explains the existence of many different microclimates.
- ❖ Broadly speaking, Spain has **eight distinct wine regions according to climate and environment**: Atlantic zone, Duero river, Ebro river, inland Mediterranean, Mediterranean, Central System, the South and the Canary Islands.

235 recognised grape varieties **150** indigenous grape varieties **350** unrecognized grape varieties

produce the wide range of flavours and aromatic profiles that Spain is known for



HISTORY

The history of Spanish wines is a fascinating journey that demonstrates Spain's ability to perfect winemaking over time.

A Millenia-Old History of Winemaking

With a history dating back over 3,000 years, Spain has one of the oldest winemaking traditions in the world. Over time, our wines have adapted to technological advances and have even helped promote them.

Wine Cultural Heritage

Spanish wines are much more than a drink; they are a living reflection of the country's cultural heritage. Ancient techniques of vine growing, winemaking practices that have improved over time and celebrations surrounding wine are **integral to the Spanish identity**.

Cultural Heritage

Spanish viticulture is steeped in a rich cultural heritage that manifests itself in every aspect of wine production. From ancient winery ruins to castles and monasteries that have witnessed centuries of winemaking, the **history of Spain is intertwined with the history of wine**.

KEY FACTS

- Wine in Spain has an **age-old tradition**.
- A process accompanied by specialisation has generated knowledge passed down **from generation to generation**.
- **1,100 BC:** the Phoenicians introduce vine planting.
- **6th century BC:** the Greeks expand vines to the Levante peninsular and export wine to other Mediterranean regions.
- **3rd century BC:** the Carthaginians spread the practice of vine growing.
- **1st century BC:** the Romans develop vineyards throughout the peninsula and trade wine across the Empire.
- **6th century:** Vineyards become the property of Visigoth kings and the Church.
- **16th century:** Development of a solid wine industry encouraged by the opening of trade routes to America.
- **19th century:** Phylloxera causes the migration of European wine producers to Spanish regions, bringing innovations.



- **1902:** Industrial Property Law.
- **1932:** The Wine Statute creates the DOs.

health benefits. Consumed in moderation, wine is associated with a reduced risk of cardiovascular disease, complementing the varied and balanced dishes this diet has to offer.

Gastronomy: A Wine to Be Eaten

Spanish gastronomy fuses tradition, regional diversity and a passion for fresh, high-quality ingredients. Each dish reflects the cultural and culinary richness of the country. Wine, more than a mere drink, is an inseparable companion for food and enhances the gastronomic experience. Thanks to their wide variety, Spanish wines offer **an option for every dish and occasion**.

Tourism: One Wine, One Journey

Spain, with its wide range of surroundings, accommodation and activities, is a world power in tourism. This variety is enriched by wines with their extensive diversity, backed

by the geographical and cultural characteristics of each region. In this regard, **wines reflect the spirit of the place where they are created**, and that is why they are an indispensable part of a trip to any part of Spain.

Wine Tourism: In Search of the Origin

Wine tourism in Spain is much more than wine tasting; it is a **unique opportunity to immerse yourself in the heart of wine regions** and connect with the land and its people. From vineyard walks to visits to family-run wineries, each experience creates an authentic link with the environment and wine artisans.



The Mediterranean diet and the culture of wine tourism

From the Mediterranean diet to the culture of wine tourism, enjoyment and socialising are integral to the Spanish wine experience.

Wine tourism in Spain is much more than wine tasting; it is a unique opportunity to immerse yourself in the heart of wine regions and connect with the land and the people who cultivate it.

Socialising

Whether in a traditional bar or a modern wine shop, wine fosters conversations, strengthens bonds and creates lasting memories. In Spain, **wine is not just a drink, but a social catalyst** that brings people together around the table to celebrate life and friendship.

Enjoyment

For Spaniards, the act of tasting wine is a celebration in itself, where the aroma, flavour, and texture of the drink are appreciated, along with the company and conversation that accompany it. This culture of wine enjoyment reflects the **Spanish passion for life, food and socialising.**

KEY FACTS

- ❖ Spain embodies climate, people and gastronomy:
 - Over **83,000** restaurants.
 - More than 270 **Michelin stars**.
 - Over **80 million** tourists annually.
 - 300 days of **sunshine** a year.

- ❖ **36 official wine tourism routes** across the country:
 - **2.5 million** wine tourists annually.
 - **Over 2,500** wine tourism services.
 - **€75M** generated by wine tourism.
 - **Supported by 794 entities** (658 city councils, 32 regulatory councils and 104 public and

- private entities).
 - **Accessible and highly digitalised sector** (63% of wine tourism bookings are made online).
- ❖ Spain has the second-**highest life expectancy in the world.**
- ❖ Wine contains antioxidants such as polyphenols that contribute to its **cardio-vascular benefits.**
- ❖ Almost **ten million hectolitres of wine are consumed annually** in Spain.



Centuries of knowledge and experience

Each bottle of Spanish wine carries with it centuries of knowledge and experience accumulated over time.

SUSTAINABILITY

Spanish wine embraces a comprehensive commitment to sustainability, respecting biodiversity, conserving social customs and preserving the landscapes in which it is grown.

Environmental

As a Mediterranean country with frequent droughts, Spain is acutely aware of the climate's impact on vine growing. For this reason, care for the environment remains a central concern in Spanish winemaking. This is reflected in the **adaptation of agricultural practices to environmental needs, the efficient use of water and the reduced use of chemicals.**

Social

Each bottle of wine tells a story of roots and hope in Spain's rural regions. In this regard, wine and the entire ecosystem created around it **help to sustain communities threatened by depopulation.**

Cultural

Wine plays an essential role in Spain's cultural sustainability. **Vineyards represent an intrinsic part of Spain's cultural heritage,** reflecting centuries of winemaking tradition

and knowledge passed down from generation to generation. Wine, as an iconic product, is rooted in the cultural identity of each wine-growing region, from family-run wineries to internationally recognised designations of origin.

Landscapes

The ecosystem created around wine in Spain is a key factor in the conservation of its landscapes. In this sense, the vineyard itself makes a significant contribution, acting as a

natural barrier against soil erosion, maintaining the integrity of the landscape and providing a habitat for a variety of plant and animal species.

KEY FACTS

- ❖ Crucial role in the Spanish economy:
 - Over **€23.7 bn** in Gross Value Added.
 - **More than 420,000** direct and indirect jobs.
 - **Over 363,000 jobs** linked to territories at risk of depopulation
- ❖ World leader in **organic vineyard surface area** (15.3% or 142,000 ha) with an annual increase of 8%.
 - ❖ **1,334** wineries and bottling companies in Spain are involved in organic production.
 - ❖ National projects such as the “**Sustainable Wineries for Climate Protection**” seal
- (94 certified wineries) aim to implement **effective control over the sustainability of the sector.**
- ❖ **Net Zero** sector commitment for 2035.
- ❖ Plays a key role in **landscape conservation and forest fire prevention.**

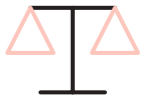


It revitalises communities threatened by depopulation

Wine and the entire ecosystem created around it help to sustain communities threatened by depopulation.



Communicating the core message



Beyond the figures

the importance of wine in Spain is clear to see from the mark it has left on our culture, history and traditions, among other aspects.



WHEN COMMUNICATING ABOUT SPANISH WINE, IT IS IMPORTANT TO CONSIDER THE FOLLOWING RECOMMENDATIONS:

WHAT TO DO

1/ Lifestyle: Wine in Spain is a way of life and an integral part of our culture, landscape and customs. It is a key component of the Mediterranean diet; with sharing and socialising at the table being a hallmark, complemented by the best gastronomy and variety of wines. This lifestyle is a key factor in our long life expectancy.

2/ Variety and quality as a key part of our identity: we lead the world with the best wines from Spain. A pioneering sector in terms of **internationalisation**, present in 189 countries.

3/Moderate consumption: the sector promotes and defends only **moderate wine consumption** and actively fights against abusive consumption through training and its communication code.

4/ Promote the value of the Spanish wine sector: emphasise its importance for the economy, environment and society, highlighting its role in culture, job creation and opportunities in rural areas. **Where there is wine, there is life.**

5/ Leader in tourism with a wide range of wine tourism experiences to discover. While many know Spain for its sun and beaches, we should highlight the attributes of our wine regions to enrich their experience.

WHAT NOT TO DO

1/Building a better image for the Spanish wine sector: it is important to stand out from the crowd without disparaging other specific wine brands, varieties or designations of origin.

2/ Promotion of moderate consumption. Restricted for minors and unsuitable for driving and pregnancy. This is a very serious issue and one that the sector places special emphasis on. It cannot be presented in a humorous way. Messages **about the possible health effects of wine must not be used as marketing materials. These can only be issued by scientists based on substantiated evidence.**

3/ Highlight the value of Spanish wine and its qualities. Spanish wine still faces the challenge of increasing its value. **Do not use phrases such as “Spanish wines are good value for money”** because this is not a positive attribute.

4/International gastronomy with Spanish wines: In addition to the fact that our wines are the perfect pairing for Spanish gastronomy, we should not limit ourselves to our own cuisine. In every country, thanks to their variety, Spanish wines are the **perfect accompaniment to the local gastronomy.**

Participants and Acknowledgements

We would like to thank all the people and entities involved in drafting this document for their effort and contributions over the months it has taken to complete.

Promoting bodies

- Spanish Interprofessional Wine Organisation
- ICEX España Exportación e Inversiones (Foods & Wines from Spain)

Participating entities

- Spanish Association of Wine Cities (ACEVIN)
- Wine Routes
- Food of Madrid
- Aragón Exterior
- Murcia Regional Development Institute
- Spanish Conference of Wine Regulatory Councils (CECRV)
- Jerez Designation of Origin Regulatory Council
- Jerez ***Designation of Origin Regulatory Council
- Spanish Wine Federation (FEV)
- Castile-La Mancha Foreign Trade and Investment Institute (IPEX)
- Castile-León Institute for Business Competitiveness (ICE)
- Ministry of Agriculture, Fisheries and Food
- Union of Small Farmers (UPA)
- Canary Islands Economic Development Company (PROEXCA)
- Navarre Institute of Agri-food Technologies and Infras-

tructures (INTIA)

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