



ANNUAL REPORT 2023

CIV

CONSEIL INTERPROFESSIONNEL
DES VINS DE PROVENCE

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ALCOHOL ABUSE IS HARMFUL TO YOUR HEALTH. ENJOY WITH MODERATION.

A WORD FROM THE CHAIRMAN

Dear Vins de Provence members and partners,

The global economic and geopolitical situation was not without consequences for Vins de Provence activities in 2023. Inflation, a decline in consumption and the wars in Ukraine and the Middle East have produced a climate of uncertainty that is weighing the market down.

French wine regions have also been hit by a deep crisis in their business model, linked to the decreased consumption of wine in France. As a result, we have been affected by cyclical as well as more structural changes that will need to be analysed in detail going forward. Our wine-making model as we have known it will necessarily need to evolve in order to bring it back in line with our consumers' changing habits.

In spite of all this, I am convinced that our wine region and our rosés still have significant potential for international growth. In other words, we must keep looking to the future and uphold our strategy. The CIVP team is hard at work dealing with these issues.

In 2023, we rolled out the Vins de Provence Strategic Plan, namely including a new advertising campaign, the Vins de Provence Expériences event in Marseille and a ramp-up of our digital communications in France and abroad. We have continued to build our wine tourism strategy, which will be a major asset in the coming years to bring the Provence experience to life for our consumers. With the launch of our wine region information days and happy hours for wine-makers, we reached out to the wine region, engaging in discussions with producers and merchants, and providing insight and solutions relating to wine tourism and exports.

Lastly, in conjunction with the wine region's technical organizations and the Syndicat des Côtes de Provence, we completed our EnViProv project and our life cycle analysis, which should allow us to set up a programme to reduce our environmental impact. This rollout will continue in 2024, and a review will be carried out at the General Assembly in July.

We will face many challenges in the years to come. It is essential that each and every one of us should plan ahead and adapt, to ensure the long-term survival of our wonderful Provence wine region. We have substantial assets at our disposal to help us achieve this, particularly our unparalleled expertise in rosé, the Provence name which is the stuff of daydreams around the world, and our gorgeous and varied scenery that attracts so many tourists.

We must remain confident in the future of Vins de Provence over the medium to long terms. And the CIVP team will be here to support you.

It is at the most complicated times that unity and shared ambition can make all the difference. You can count on my determination to keep driving that ambition.

Eric Pastorino

*Chairman of the Conseil Interprofessionnel
des Vins de Provence*

ORGANIZATION OF THE CIVP









The Conseil Interprofessionnel des Vins de Provence has been recognized by the public authorities as an inter-professional organization of collective interest, in accordance with Articles L632-1 et seq. of the French Rural Code, as well as in the European Community Code.

COMPOSITION OF THE CIVP EXECUTIVE BOARD

ITS MEMBERS ARE WINE-MAKERS AND WINE MERCHANTS WHO WORK WITH THE CÔTES DE PROVENCE, COTEAUX D'AIX-EN-PROVENCE AND COTEAUX VAROIS EN PROVENCE PDOS. THE CIVP HAS MADE IT POSSIBLE TO:

1. Reinforce the strength of the wine industry in France
2. Give its members increased means of action and financial resources
3. Promote the special features of each appellation.

BOARD OF DIRECTORS


 <i>Chair</i> Eric Pastorino Production	 <i>1st Vice-chair</i> Olivier Nasles Production	 <i>General Secretary</i> Eric Lambert Production
 <i>2nd Vice-chair</i> Philippe Brel Trade	 <i>3rd Vice-chair</i> Philippe Laillet Trade	 <i>Treasurer</i> Salvatore Patti Trade
 <i>Deputy General Secretary</i> Aurélie Bertin Trade	 <i>Deputy Treasurer</i> Paul Bernard Production	



ORGANIZATIONAL CHART | 2024

CIVP
CONSEIL INTERPROFESSIONNEL
DES VINS DE PROVENCE

Leadership & Administration


Brice Eymard
Managing Director


Nicolas Watterlot
Administrative & Financial Director



Solange Rivière
Administrative & Accounts Coordinator



Anaïs Pignolet
Reception & Project Assistant

Marketing & Communication Department

Publicizing and promoting the image of our brand and our PDOs



Carole Guinchard
Marketing & Communication Director



Eloïse Lapp
Marketing Manager

EXPORTS



Caroline Benetti
Area Manager, Europe



Romain Diho
Area Manager, Outside Europe



Lou Ligeron
Export Project Coordinator

MEDIA & WINE EDUCATION



Romain Schalapa
Media Relations & Wine Education Project Manager



Cédric Skrzypczak
Digital Expert & Project Manager

DIGITAL

EVENTS



Valérie Guillorit
Events Project Manager



Manon Penot
Events Project Coordinator

Economic Analysis Department

Providing the necessary analysis and insights about our wine region and markets



Brice Amato
Economic Analysis Department Manager



Caroline Grosso Margaria
DeclarVins Expert & EA Assistant



Laetitia Paganelli
Research Coordinator

Regional Coordination & Wine Tourism Department

Turning all the region's actors into ambassadors for Vins de Provence



Clotilde Métier
Regional Coordination Project Manager



Delphine Moreau
Wine Tourism Project Manager

Technical Department

Leading and coordinating industry projects



Suzon Lamotte
Technical Project Manager

ORGANIZATIONAL CHART | 2024

ORGANIZATIONAL CHART | 2024

CIVP DECISIONS AND MISSIONS

GOVERNANCE

GA = 50 delegates

- Defines the CIVP's policies and general objectives
- Approves the CIVP's financial statements and votes on its budget
- Votes on the CIVP's by-laws, internal rules and regulations, inter-professional agreements and dues
- Chairmanship of the CIVP alternates every three years between production and trade
- Elects the Chair of the CIVP and the Members of the BoD and Executive Board

DECISIONS:

All the CIVP's decisions are made by professional representatives (producers and merchants).

Monitoring of CIVP operations and missions

BOARD OF DIRECTORS: 24 volunteer members

- Prepares and ensures the application of the approved strategy
- Approves and implements institutional orientations

EXECUTIVE BOARD: 8 volunteer members

- Executes the defined missions and programmes
- Monitors the CIVP's regular operations and administrative and financial management

Preparation and monitoring of CIVP actions

APPELLATION COMMITTEES FOR EACH PDO:

- Include delegated members from production and trade
- Define their own budgets and programmes
- Recommend specific dues rates

STANDING COMMITTEES FOR JOINT VINS DE PROVENCE ACTIONS

- Marketing & communications, economics, techniques and quality monitoring
- Equal production/trade representation, co-chaired by a wine-maker and a merchant

MISSIONS:

The CIVP's missions are approved by the industry's professional representatives, reviewed by the public authorities and implemented by a team of 19 people.

THEY ARE BUILT ON FOUR PILLARS:

- 1. ECONOMY:** Knowledge of supply and demand and market regulations
- 2. TECHNIQUES:** Research and experimentation, thanks in

particular to a partnership with the Centre du Rosé

3. QUALITY: Quality monitoring to check and improve the quality of wines when they reach the market

4. COMMUNICATION: Collective communication about and promotion of wines from the three PDOs, in France and abroad.



The CIVP team

VINS DE PROVENCE STRATEGIC PLAN

Vins de Provence has undergone profound changes in the space of a few years:

- | Product upgrading on our markets and a dramatic rise in exports (500% in 10 years)
- | A significantly altered structure for our appellations and our marketing
- | Confirmed premium image and leadership status in rosé wine.

In response to these developments, competition is growing more intense within a context of major potential for international growth in the coming years. The CIVP's Board of Directors and teams have developed a strategic plan based on five priorities:

1. CONSOLIDATE OUR POSITION AS A PREMIUM LEADER IN ROSE by maintaining and developing reference tools and materials on the subject of rosé wine, such as:



2. DEVELOP A PREMIUM, COLLECTIVE BRAND STRATEGY

- | Prioritize investments in higher-potential target markets to increase their impact
- | Refresh and strengthen the brand's platform
- | Capitalize on digital technologies
- | Bolster our actions with influencers and opinion leaders
- | Boost our R&D and technical support so we can achieve premium baseline quality

3. MAKE WINE TOURISM THE TOP SHOWCASE FOR THE WINE REGION

- | Make our offerings intelligible and visible
- | Coordinate and encourage all the actors involved in tourism
- | Enrich the wine tourism experience to boost the Vins de Provence image

4. COMPLETE OUR ECOLOGICAL TRANSITION

- | Provide structure for and drive the wine region's ecological transition thanks to the EnViProv project
- | Define a strategic technical plan for the wine region in collaboration and coordination with technical organizations
- | Participate in the construction of the "new" Centre du Rosé, a cutting-edge R&D centre for rosé wine and Provence



5. STRENGTHEN TIES BETWEEN THE CIVP, WINE-MAKERS AND WINE MERCHANTS, ALL WORKING TOWARDS OUR SHARED AMBITION

- | Turn the wine region's actors into brand ambassadors
- | Gain a better understanding of the wine region's expectations and support its evolution
- | Facilitate and emphasize an understanding of our economic and regulatory environment
- | Disseminate information and communicate better
- | Strengthen ties between the CIVP's members, elected representatives and staff



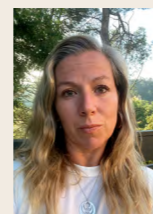
MANAGEMENT DEPARTMENT

The Administrative & Financial Department provides support to the other departments and is responsible for defining and running the CIVP's internal organization. Its main functions include budget forecasting in consultation with leadership and the teams, tracking financial and structural results, management control, accounting, and financial and fiscal management.

TEAM



Nicolas Watterlot
Administrative & Financial Director



Solange Rivière
Administrative & Accounts Coordinator

FUNDING

The CIVP is funded by inter-professional dues, made mandatory by the public authorities by means of an extension procedure. The dues are based on sales volumes and are collectable as from the monthly declaration of wines released from storage.

We also apply for funding from institutional partners like national organizations in the industry, the Region, the EU, and our banks and insurance companies.



BUDGET

The CIVP's budget is analytically allotted to and used on:

- Joint actions for Provence wines, funded on a shared basis of €3.14/hl
- Joint Vins de Provence actions: techniques, economics, operations, quality monitoring, national funding (CNIV and Vin & Société) and marketing & communications
- Specific communication actions for each of the three PDOs and the five DGCs, respectively funded by each appellation's remaining dues
- Messaging aimed at the French market to promote the image of each of our PDOs and DGCs
- Launch of the CIVP's Strategic Plan (for which the Board of Directors approved a budgetary deficit for 2023 following profitable years in 2021 and 2022 because of the pandemic and the cancellation of certain actions)
- Rollout of planned actions (made possible, in spite of a drop in dues, by optimizing grants and controlling expenditures while still reducing the originally expected deficit)
- Negative earnings at €877,453, offset by the reserves amassed in previous years.

DUES

Voluntary compulsory dues

What are these dues and why do our members pay them?

Voluntary compulsory dues are contributions that aim to promote agricultural value chains. They have been collected by inter-professional organizations since their recognition by the French law of 10 July 1975.

These dues are set and collected by an inter-professional organization in order to finance actions taken in the common interest of the entire value chain. They are governed by Articles L632-1 to L632-12 of the French Rural and Maritime Fishing Code.

— Voluntary —

In reference to the inter-professional agreement through which professional organizations agree, at their own initiative, to establish dues.

— Compulsory —

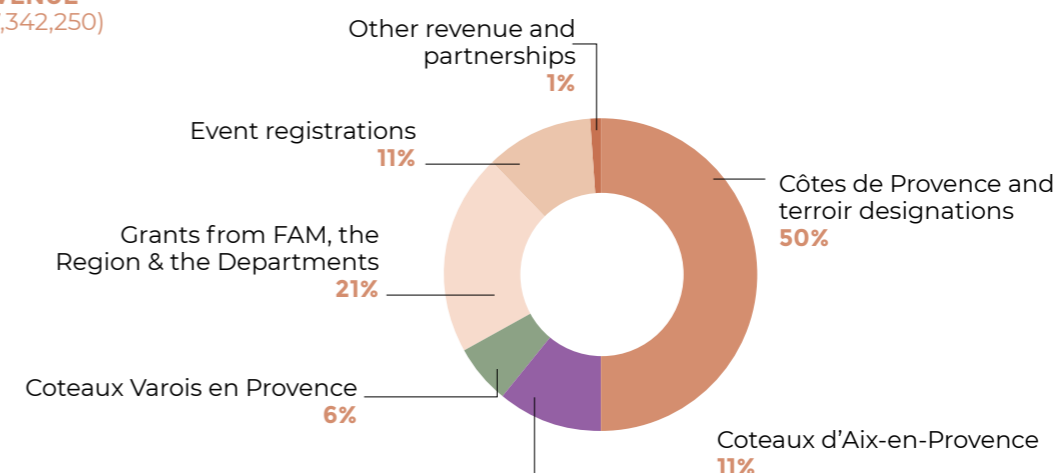
As a reminder that the provisions of that agreement are usually extended by ministerial decree to all the members of the concerned value chain, who have an obligation to satisfy them.

DUES CALCULATION FOR 2023

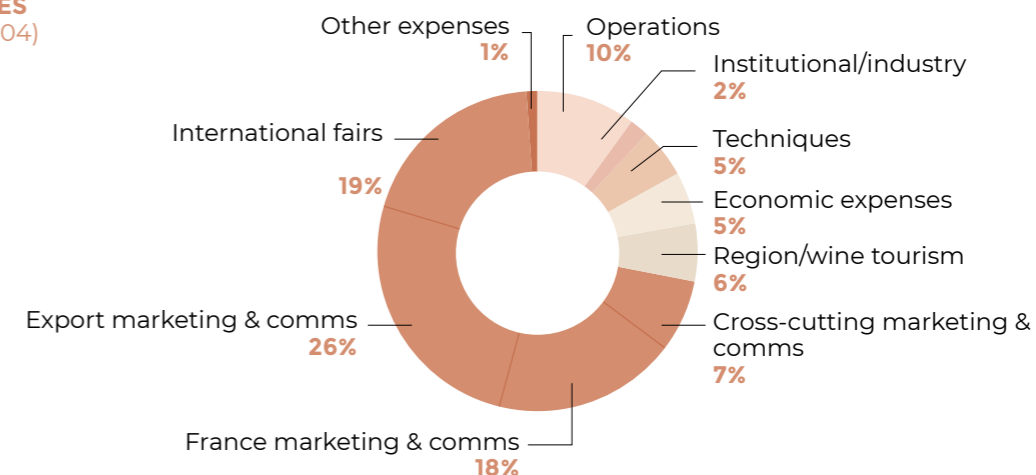
The releases to market in 2023 that generated voluntary compulsory dues were as follows:

	2023			2022 Value
	Value	Volume (in hl)	Dues rate	
Côtes de Provence PDO	€3,527,151	819,810 hl	€4.31/hl	€3,768,099
Côtes de Provence PDO Sainte-Victoire DGC	€104,569	19,723 hl	€5.31/hl	€118,222
Côtes de Provence PDO Fréjus DGC	€6,549	1,520 hl	€4.31/hl	€2,718
Côtes de Provence PDO La Londe DGC	€38,681	5,291 hl	€7.31/hl	€40,973
Côtes de Provence PDO Pierrefeu DGC	€9,158	1,253 hl	€7.31/hl	€10,474
Côtes de Provence PDO Notre-Dame des Anges DGC	€7,634	1,771 hl	€4.31/hl	€12,720
Coteaux d'Aix-en-Provence PDO	€787,418	197,316 hl	€4.50/hl	€866,368
Coteaux Varois en Provence PDO	€445,574	110,018 hl	€4.05/hl	€514,216
TOTAL	€4,926,734	1,156,702 hl		€5,333,790

REVENUE (€7,342,250)



EXPENSES (€8,219,704)



TECHNICAL DEPARTMENT

TECHNICAL MISSION REACTIVATED IN 2022 AND CONTINUED IN 2023

The CIVP's Technical Department was created in January 2022, following the internal reorganization dictated by the Strategic Plan 2022-2024.

THE DEPARTMENT'S ROLE REVOLVES AROUND THREE CORE FUNCTIONS:

- 1. Rebuilding** ties between the wine region's different technical actors
- 2. Disseminating information and knowledge** throughout the wine region and providing visibility of our technical advances to the outside world
- 3. Leading and coordinating projects** that will allow Vins de Provence to meet the biggest technical challenges

TEAM



Suzon Lamotte
Technical Project Manager

The Technical Committee was reactivated in early 2022 and is co-chaired by Alexis Cornu (trade) and Jean-Marie Porte (production).



Jean-Marie Porte
Co-chair (Production)



Alexis Cornu
Co-chair (Trade)

STRATEGIC DISCUSSIONS ON HOW TO COLLECTIVELY ALIGN OURSELVES TO HANDLE THE MAIN TECHNICAL CHALLENGES FACING THE VINEYARD:

After a day of collective intelligence that was co-organized by the CIVP and the Côtes de Provence ODG (management and advocacy body), attended by the region's leading technical actors, five technical challenges and eight priority topics or questions were identified.

FIVE KEY TECHNICAL CHALLENGES FACING VINS DE PROVENCE:

1. Adaptation to **climate change**
2. **Consumer expectations**, in line with **societal expectations**
3. Guarantee of **impeccable quality** and upgraded status for our wine
4. **Adjustment of production volumes** to consumer demand and achievement of an economic balance
5. Roles of **women and men** within Vins de Provence



Climate change



Consumer / societal expectations



Impeccable quality & upgraded status



Quality attuned to consumer demand and economic balance



Women and men in the industry

EIGHT PRIORITY TOPICS/OBJECTIVES FOR THE INDUSTRY:

- Overall **water** management at vineyards and wineries
- Sustainable soil** and biodiversity management within the wine region
- Moving towards **low-impact, energy-efficient vitiviniculture**
- Development, monitoring and confirmation of technical knowledge and innovations, and their **transfer to wine-makers**
- Keeping the technical and marketing promises of the **different segments** (premium and super-premium) by guaranteeing our wine's **baseline quality** as a priority
- Updates to our **vine material** and its training methods (grape varieties, rootstock, pruning and density)
- Meeting **needs for different skill sets** by adapting to the next generations
- Differentiation and promotion of **our wines' specific characteristics**: types, terroirs, colours and profiles

In 2023, six Technical Committees allowed us to review the progress made on the Technical Department's various projects and direct its actions.



ENVIPROV: A REVIEW OF THE WINE REGION'S PRACTICES AND THE ENVIRONMENTAL IMPACT, LEADING TO CONCRETE SOLUTIONS

EnViProv is a group project co-financed by the France Relance recovery plan that brought five technical partners from the industry together in 2021 and 2022 – the Centre du Rosé, Provence Rosé Cluster, Syndicat des Vins Côtes de Provence, Var Chamber of Agriculture and CIVP – united in one common ambition, to **support the wine region** through its ecological transition.

As a reminder, this project pursues several operational goals:

1. In environmental terms:

- Reduce the wine region's greenhouse gas emissions
- Convert 100% of the wine region to HEV (High Environmental Value) or organic by 2023 (60% by 2024)
- Accelerate the ecological transition

2. In terms of industry dynamics:

- Give the industry structure and coordinate the actions of technical organizations
- Disseminate and transfer information and support / train the wine region.

ENVIPROV IS BUILT ON THREE CORE ACTIONS:

1. **Life cycle analysis** of the Provence wine region, led by the CIVP
2. **A collective campaign to achieve HEV certification**, led by the Côtes de Provence ODG
3. **Support for the wine region** in implementing ethical practices, led by all the partners.

In addition, **experiments** carried out by the Provence Rosé Cluster's Living Soil Group, the Centre du Rosé and the Var Chamber of Agriculture further supplement this programme for the purpose of testing and promoting ethical vine management techniques at wineries and vineyards.

LIFE CYCLE ANALYSIS (LCA) OF THE PROVENCE WINE REGION: IDENTIFYING POINTS WITH THE BIGGEST POTENTIAL FOR REDUCING OUR ENVIRONMENTAL FOOTPRINT

In 2022, the IFV performed a life cycle analysis of the wine region on behalf of the CIVP, based on survey data gathered from some 30 companies that are representative of the region (individual wineries, cooperative wineries and wine merchants covering the three PDOs).

10 KEY INDICATORS TIED TO VITIVINICULTURAL PRACTICES

In 2023, EnViProv's partners were tasked with identifying priority points of leverage for each indicator, with the goals of reducing the value chain's environmental impact and providing guidance to vineyards in their choices for more ethical practices. The purpose of these indicators is to help businesses in the industry position themselves in relation to benchmark products in Provence and comparable production systems. Thanks to those indicators and following the results of the joint LCA, several key fields were identified to help prioritize our commitments.

High Environmental Value (HEV): A confirmed trend thanks to the collective process managed by the Syndicat des Côtes de Provence.

In 2023, we had a total of 182 certified HEV 3 operators (including 37 cooperative wineries) covering a total area of 10,713 hectares.

For the 2023 vintage, **Provence PDO vineyards with environmental certifications (organic or HEV) accounted for 57%** of the wine region's total area (15,748 hectares) and **77%** of its operators. This represents a 112% increase in operators and 150% growth in certified land since 2020.



ENVIPROV

Vins de Provence at the heart of the ecological transition



CENTRE DU ROSE SCIENTIFIC PROGRAMME FOR 2023

Le Centre
du Rosé
le goût de la recherche

CIVP FUNDING FOR SOME
20 PROJECTS RANGING
FROM GRAPE VARIETIES TO
CONSUMERS

VINE MATERIAL: ADAPTING TO CLIMATE CHANGE AND SOCIETAL EXPECTATIONS

O'César (an observatory tracking grape varieties in the South of France): A regional project with multiple partners (Chambers of Agriculture, appellation syndicates and the IFV) that shares and centralizes observation data on innovative varieties. 2023 witnessed the second comprehensive observational operation, with 115 blocks under agronomic monitoring and 58 wines made from 30 different grape varieties.

Varietal creation for Provence: EVA (an experimental block in La Celle): Planted in 2021, around 150 innovative grape varieties that are resistant to drought or disease are grown here, all of them aligning with the characteristics of Vins de Provence wines. Observations continued in 2023 – this time on the “third leaf” (the third harvest, when there is finally fruit to be picked) – with agronomic and oenological observations and maturity testing.

VINE TRAINING METHODS

Adaptation to climate change: Two experimental set-ups are dedicated to Grenache, in Pontevès and Carnoules, created to monitor and evaluate innovative crop management techniques like shade netting and canopies. The methods vary depending on the vines' phenological stage at the time of installing the shade.

Yields and quality: This study of combinations of irrigation and fertilization strategies was designed to identify the optimal physiological balance for vines to produce high-quality grapes that can make the typical Provence style of rosés. Irrigation frequencies are also studied in two specific terroirs.

VINIFICATION AND OENOLOGY: SUPPORT FOR INNOVATIONS IN EQUIPMENT, PRODUCTS AND PROCESSES FOR ROSÉ WINE-MAKING

Stability and hyperoxygenation: The consequences and advantages of hyperoxygenation on rosé musts are evaluated in terms of the aromatic and colour stability of finished wines – particularly pressed wines – requiring less SO₂.

Sulphite-free wine: Experiments on co-designed crop management and support techniques at a few pilot sites with experimenting wine-makers. For the production of rosés with no added sulphites, the key point where malolactic fermentation may get blocked has been identified and studied. In addition, surveys of producers and consumers have revealed illuminating differences between those two groups' perceptions of wines with no added sulphites.

Aromatic specificity of Vins de Provence wines: Work on Charlotte Richard's doctoral thesis for the Nice Institute of Chemistry has entered its third year. After lengthy methodological fine-tuning, a large number of aromatic compounds have been measured in many Provence rosés.

QUALITY AND TYPICITY: A ROSÉ CHAIR DEDICATED TO VINS DE PROVENCE

In 2021, the Centre du Rosé partnered with Kedge Business

School to launch a far-reaching three-year study of rosé wine, funded by the CIVP and Caisse d'Épargne Côte d'Azur. In 2023, progress was made on three lines of the study:

1. **Research into consumer perceptions and expectations** in respect of the colour of rosé wine
2. **Significant advances in colorimetry**, linking physical measurements physical measurements to perceptions of light
3. **Launch of the neuroenological line** to identify the parts of the brain that are activated when tasting Provence rosés.



Centre du Rosé communications in 2023

- | **Two Rosé & Recherche magazines** (January & June 2023)
- | **Three newsletters** (February, September & November 2023)
- | **Two motion design videos** for EVA and O'César
- | **France 3 news broadcasts and magazine programmes:** 1 o'clock news on 20 July, *Vaqui* (discovery of the PACA region) on 24 September, 7 & 8 o'clock news on 29 September and *Prioriterre* (sustainable development) on 5 March 2024 .
- | **Vins Provence Expériences:** Conference on climate change adaptation
- | **Sitevinitech** Montpellier: Presentation of O'César
- | **Sitevi** masterclass at a vineyard: Tasting of new grape varieties
- | **Open Day** at the Centre du Rosé (19 October)
- | **Oenologists' round table** on grape varieties (29 March)
- | **EVA project**, winner of an Innovation Trophy (25 May)

Key figures

- | **200** wines made at the experimental winery
- | **1,600** samples collected



The Centre du Rosé team

NATIONAL PLAN AGAINST VINEYARD DECLINE

PLAN NATIONAL
DÉPÉRISSEMENT DU VIGNOBLE



Vine-growing and wine-making inter-professional councils, grouped together under the CNIV, have been involved in a National Plan against Vineyard Decline since 2017, with the support of the Ministry of Agriculture and FranceAgriMer. This complex phenomenon is affecting all wine regions and their productivity. The plan has led to the funding of research programmes, resulting in trainings, information sheets and practical applications like:

| An **information platform**: www.plan-deperissement-vigne.fr

| An online **self-study platform** that won an OIV award: webformation.plan-deperissement-vigne.fr.



NATIONWIDE RESEARCH INTO VINEYARD DECLINE PHENOMENA – WINNERS OF THE 2023 CALL FOR RESEARCH PROJECTS:

| VitiMining: Grapevine viruses and their variants

Objective: Mine public high-throughput sequencing databases around the world to study the prevalence of grapevine viruses and their variants in order to anticipate the risk of an outbreak

| PerN: Nitrogen fertilization

Objective: Develop a working tool for planning and managing nitrogen, mineral or organic fertilization for grapevines

| Qualigreffes: Study of graft quality and its impact on plant growth and longevity

Objective: Define relevant indicators for the quality of grafted plants and analyse the connection between grapevine growth and longevity

| Vigye: Grapevine Pinot Gris virus

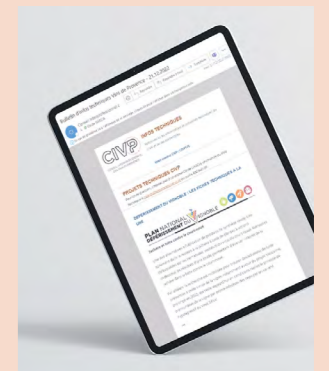
Objective: Understand the link between grapevine Pinot Gris virus (GPGV) and the associated symptoms, and study its transmission in order to implement preventive actions

THE PLAN TEAM: A NETWORK OF REGIONAL AMBASSADORS FROM RESEARCH AND THE FIELD

In late March 2022, a Plan Team was created with the goal of **regionalizing the National Plan in order to accelerate the transfer of lessons learned** (advances in research, best practices, new knowledge, etc.) to the different wine regions. The Plan Ambassador for Provence is the CIVP's own Suzon Lamotte.

REGIONAL COORDINATION FOR A BETTER GRASP ON PROVENCE'S ISSUES

In collaboration with the working group on vineyard decline, a survey of the wine region was conducted in 2023 to identify vineyard decline topics specific to Provence and then direct the transfer of experimentation results from the National Plan in the region. In addition, news items and information sheets on vineyard decline are regularly published in the CIVP's technical newsletter, which is sent to the entire wine region.



QUALITY MONITORING

Quality monitoring is enshrined in the CIVP's by-laws. This function aims to ensure our wine's compliance with the law and with consumers' quality expectations. It is fulfilled by the Quality Monitoring Committee (QMC), an independent, objective body whose members come from both trade and production, which has been performing or supervising the associated duties since 2004, including:

- | Collecting samples of wine on the market from the three PDOs
- | Organizing tastings of the sampled wines
- | Analysing the collected samples
- | Notifying the relevant operators of any major or minor defects found in the wine.

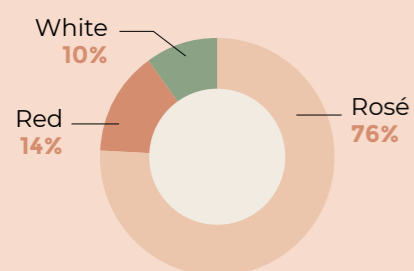
The eight members of the Quality Monitoring Committee in 2023:

Philippe Laillet	Trade	Chair
Eric Lambert	Production	Vice-chair
Pierre-Jean Bertri	Trade	Member
Max Alberto	Production	Member
Patrick Lobier	Trade	Member
Didier Pauriol	Production	Member
Salvatore Patti	Trade	Member
Frédéric Ravel	Production	Member

PROFILES OF THE SAMPLED VINS DE PROVENCE WINES

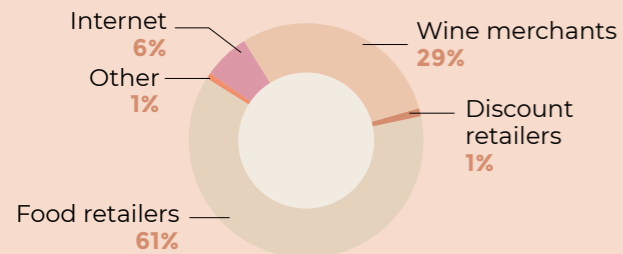
2023 QM - CIVP

Breakdown of samples by colour



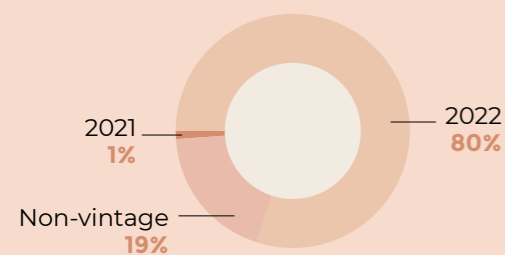
2023 QM - CIVP

Breakdown of samples by channel



2023 QM - CIVP

Sampled vintages of rosé



OPERATIONS

The purpose of quality monitoring is to detect major, objective defects in the Côtes de Provence, Coteaux d'Aix-en-Provence and Coteaux Varois en Provence PDOs, by means of random, nationwide samples taken by an independent service provider. The sample set is representative of the supply that is available to consumers. All the samples are first tasted against a chart of defects prepared by the QMC. Next, they are tested by an independent laboratory. A letter is sent to all the sampled labels' signatories to inform them that their wine has been sampled. The CIVP then sends out information and/or warning letters based on the test results and the tasting marks and comments.

SAMPLING AND TASTINGS IN 2023

283 samples were collected in May 2023 (including 20 from 3-litre boxed rosé wine): 192 from Côtes de Provence, 56 from Coteaux d'Aix-en-Provence and 35 from Coteaux Varois en Provence.

15 panels of three or four tasters were held at Maison des Vins Côtes de Provence on 15 June 2023.



2023 QM RESULTS

93% of the samples taken were compliant with the appellation specifications, the same as in 2022. 21 letters were sent regarding major defects, compared to 18 in 2022.

ECONOMIC ANALYSIS DEPARTMENT

The role of the CIVP's Economic Analysis Department is to conduct sectoral analyses and market research. That mission aims to provide an in-depth understanding of the market dynamics for Vins de Provence wines, as well as the national and international competitive landscape, for the benefit of both internal employees and our members and partners.

OUR APPROACH IS BASED ON THREE MAIN MISSIONS:

- 1. Rigorous tracking** of economic indicators for viticulture (pre-market)
- 2. Meticulous examination** of sales trends through market research (post-market)
- 3. Strategic management** of Rosé Wines World Tracking in partnership with FranceAgriMer, a unique global economic observatory that is increasingly consulted thanks to its growing reputation.

TEAM



Brice Amato
Economic Analysis Department Manager



Laetitia Paganelli
Economic Research Coordinator



Caroline Grosso Margaria
DeclarVins Expert & EA Assistant



Corinne Meissonnier
EA & Management Assistant

Corinne retired in April 2024. We would like to extend our heartfelt thanks to her for her work and wish her a wonderful new adventure.

The Economic Analysis Department also enjoys the support of the Economic Committee, which conducts monthly analyses of market trends and balances, in terms of both wine-growing and national and international sales. That committee plays a vital role in market tracking and is co-chaired by Laurent Rougon (production) and Philippe Brel (trade).



Laurent Rougon
Co-chair (Production)



Philippe Brel
Co-chair (Trade)



THE CIVP'S ECONOMIC ANALYSIS DEPARTMENT IN 2023

- | Average attendance of **50** people at each wine region meeting*
- | Tracking of around **150** countries, with a special focus on 15 of them
- | Distribution of **3** economic newsletters per month on average
- | Creation of **more than 100** dashboards
- | **120** days spent on the hotline providing support for wine declarations, especially monthly summary declarations

* Wine region informational meetings, on topics such as food retailers in France and Rosé Wines World Tracking, for example

ACTIVITIES OF THE ECONOMIC ANALYSIS DEPARTMENT

- Monitoring of analyses of sales of still wines – especially rosés – by food retailers in France, in conjunction with other inter-professional councils in the CNIV
- Organization and analysis of targeted quantitative and qualitative market research in order to refine our understanding of wine consumers in France and abroad

As concerns data from the wine region, our team's daily work involves conducting in-depth analyses so as to produce and share internal and external dashboards on a regular basis. Improving data reliability, checking the databases and protecting data privacy remain absolute priorities for us.

ROSÉ WINES WORLD TRACKING

- Studies covering 45 countries
- Consultations with 20+ experts to grasp the latest market trends
- Use of many consumer focus groups
- Tracking dating back to 2002, facilitating the identification of long-term trends
- Recognized by professionals in the sector as a unique and invaluable tool

This overview of the Economic Analysis Department underscores our ongoing commitment to providing all our stakeholders with economic indicators that can foster growth and enable informed, strategic decision-making to support the growth of Vins de Provence wines.

MARKET RESEARCH AND ANALYSIS (2023 FINANCIAL YEAR)

ROSÉ MARKETS IN 2023

1. Releases to market: In a complicated economic climate, affected in particular by inflation and bad weather in the spring and early summer of 2023, releases to market for each Vins de Provence PDO were down 9% at:

- 762,029 hl of Côtes de Provence rosés
- 168,686 hl of Coteaux d'Aix-en-Provence rosés
- 100,925 hl of Coteaux Varois en Provence rosés.

2. Exports: In 2023, after two record-breaking years, Vins de Provence exports shrunk by 11% to 411,461 exported, which was still similar to the figures for 2019 and 2020.

3. Food retailers in France: In a context that saw food retailers' still wine sales fall by 6% (4% for rosés and 9% for PDO rosés), Vins de Provence rosé sales dropped by an average of 12% in 2023.



2023 ROSÉ HARVEST

The harvest for the 2023 vintage, all colours combined, amounted to 1,215,070 hl, a 7% decline from the previous harvest. The rosé harvest decreased by 8% to 1,080,200 hl. Given the lower inventory levels at the beginning of 2024, the Vins de Provence rosés available for sale on the different markets in 2024 are estimated at **1,256,000 hl, 2% less** than last year and **2% lower** than the three-year average.

DETAILS

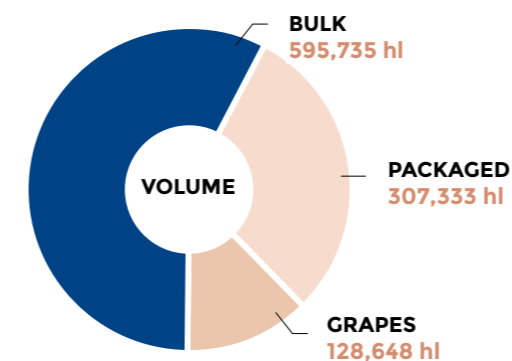
2023 HARVEST FIGURES				
VOLUME (in hl)	RED	ROSE	WHITE	TOTAL
Côtes de Provence	40,979	768,190	48,046	857,215
Coteaux d'Aix-en-Provence	16,910	201,553	20,663	239,127
Coteaux Varois en Provence	4,126	110,457	4,145	118,728
Total Vins de Provence wines	62,015	1,080,200	72,855	1,215,070

SALES OF VINS DE PROVENCE WINES FROM THE VINEYARDS

The sales break down at approximately **57%** bulk and grapes and **43%** direct from the property.

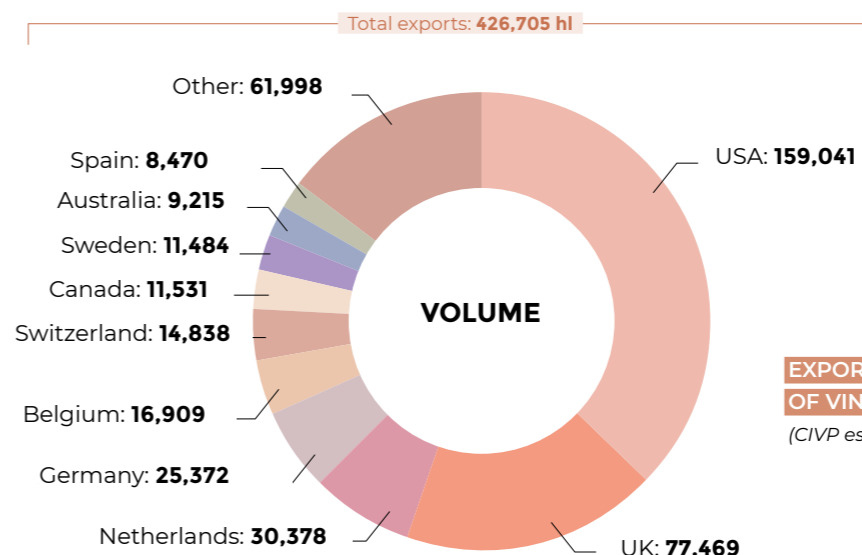
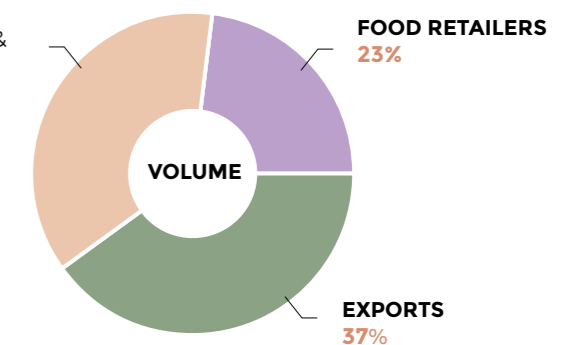
SALES OF VINS DE PROVENCE ROSÉS FROM THE VINEYARDS IN 2023

(in hl, source: CIVP as per income tax and monthly summary returns)



BREAKDOWN OF SALES CHANNELS IN 2023

Breakdown of Vins de Provence distribution channels, all colours combined (CIVP estimates, 2023)



EXPORTS OF VINS DE PROVENCE WINES IN 2023

(CIVP estimates, 2023)

Free software: Reminders for wine reporting obligations in Provence, available on calendrier-vitivini.vinsdeprovence.com

DON'T MISS OUT!

See your summary calendar of wine declarations

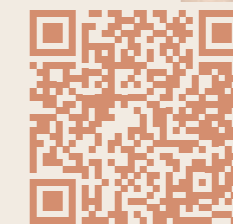
The CIVP's Economic Analysis Department launched a project in late 2022: a calendar of French wine declaration due dates to help you keep on track!

Our goal is to provide easy-to-understand information and links for the reporting obligations that producers and merchants in the industry must fulfil, by grouping them all together in a single, freely accessible calendar.

This dynamic calendar aims to give you maximum visibility, for informational purposes only.

Check out the calendar by going to: calendrier-vitivini.vinsdeprovence.com.

If you have any questions, please don't hesitate to contact Caroline Grosso Margaria, who is responsible for the project, at cmargaria@provencewines.com.



MARKETING & COMMUNICATION DEPARTMENT

As we implement our Strategic Plan 2022-2024 and face new challenges (continuation of our premiumization, inflationary context, increased competition for newcomers attracted by the success of Provence wine, etc.)...

THE MARKETING & COMMUNICATION DEPARTMENT'S MISSION REVOLVES AROUND TWO MAIN PILLARS:

- 1. Strategic marketing**, the goal of which is to **consolidate and reinforce the leadership position of Vins de Provence, our premium, collective brand**, and the three PDOs that it covers
- 2. Operational marketing**, whose goal it is to **roll out competitive, effective action and communication plans on our priority markets** in France and abroad.



Carole Guinchard
Marketing & Communication Director



Eloïse Lapp
Marketing Manager



Valérie Guillorit
Events Project Manager



Manon Penot
Events Project Coordinator



Cédric Skrzypczak
Digital Project Manager



Romain Schalapa
Media Relations & Wine Education Project Manager



Caroline Benetti
Area Manager, Europe



Romain Diho
Area Manager, Outside Europe



Lou Ligeron
Export Project Coordinator

TEAM

The Marketing & Communication Committee has 15 members and is co-chaired by Jeany Cronk (trade) and Frédéric Ravel (production).



Jeany Cronk
Co-chair (Trade)



Frédéric Ravel
Co-chair (Production)

2023: A YEAR OF REVITALIZATION

In spite of a challenging economic climate in France and our export markets, 2023 was a major year for Vins de Provence, with the **complete revitalization of our marketing and communications system**, namely by means of:

1. The launch of a new advertising campaign designed to attract the next generations of consumers

2. The successful first edition of Vins de Provence Expériences

3. The strengthening of our digital strategy, a strategic point of contact for winning over young adults

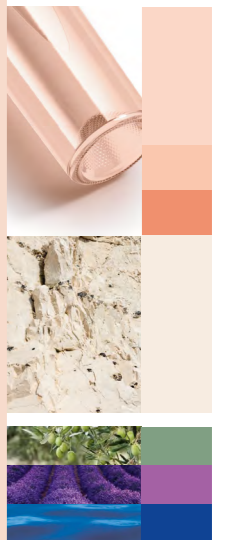
4. The complete revitalization of our ecosystem of partner agencies and our action plans, across all our export markets

5. The rollout of our wine education programme.

BRAND STRATEGY

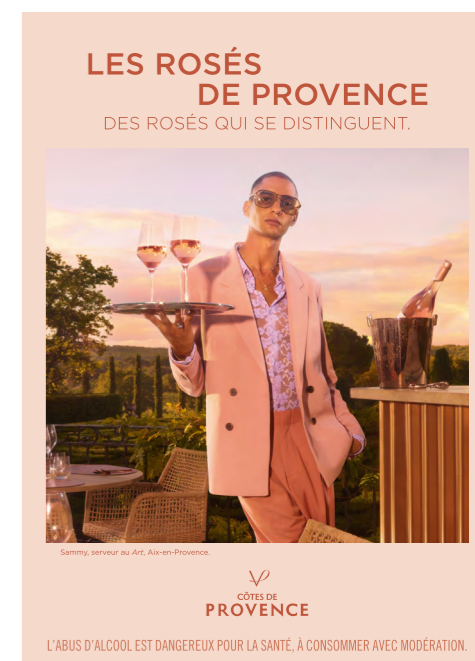
1. OVERHAUL OF OUR VISUAL IDENTITY

The goal of this project was to rethink our branding elements (logos, colours and codifiers) and **develop a new graphic charter** that draws from our Provençal roots and modernizes their expression.



2. LAUNCH OF A NEW ADVERTISING CAMPAIGN

The purpose of developing a new **advertising campaign** was to boost brand desirability amongst our target audience of "hedonistic millennials". The tagline – "Les Rosés de Provence. Born Original. Made Distinct." – and the campaign's photographic treatment have reinforced our leadership status in the field of rosé and our premium positioning. In 2023, this campaign was rolled out in France and all our strategic export markets.



MARKET ACTION PLAN

FRANCE ACTION PLAN: JOINT VINS DE PROVENCE ACTIONS FOR ALL THREE PDOS

1. MEDIA PLAN

The launch of our new campaign was supported by an extensive multimedia plan including the printed press, national and regional posters, digital resources and events.



Posters: Premium advertising for the new campaign's launch phase and providing a connection during the summer season.

Paris: Presence of posters at Metro entrances, digital posters at the Gare de Lyon in a unique set-up (10 screens and an 87 m² adhesive wall) and others at the Gare de Lyon and Gare Montparnasse (100 screens).

PACA: Posters on street furniture and billboards (1,266 sign faces), event posters at Marseille Provence Airport and the Aix-en-Provence TGV Train Station, 80 screens at train stations in Avignon, Marseille, Cannes and Nice, for a **total of 1,780 sign faces generating over 44 million contacts with the 25-39 years segment. Digital: 1,227,127 adverts displayed.**

Press: Messaging from May to August in the national press (3.1 million copies in circulation) and local press to maximize coverage, as well as supplemental coverage in the trade press.

Digital: A digital campaign displayed on websites and social media from May to August, aimed at an extremely targeted audience. **Nearly 67 million impressions were recorded.**

2. DIGITAL COMMUNICATION

Vins de Provence has a presence on the main social networking platforms:

VdP website at www.vinsdeprovence.com

Vins de Provence **Facebook page**

@vinsdeprovence **Instagram account**

CIVP – Vins de Provence **LinkedIn page**

Vins de Provence **YouTube channel**

In 2023, a new agency specializing in digital communications (Agence Kindai) was chosen to assist the CIVP with its social media communications, with the main objectives being to increase the Vins de Provence brand's visibility on social media (particularly Instagram) and to boost the effects of our communications by creating content that is modern, impactful and engaging.

2023 figure: More than 23 million people reached by Vins de Provence posts on social media.



3. MEDIA RELATIONS

The challenge facing our France Media programme was to reinforce the image of Vins de Provence as a leader in the rosé category.

In 2023, the programme was structured around four main pillars:

- | Leadership and product superiority
- | Economic influence
- | The wine region's environmental engagement
- | Wine tourism in Provence.

2023 in figures:

| Nearly **200 media spin-offs** in the wine trade / industry press, the economic press, the consumer press and the tourism press, with an impact of **115 million people reached**

| **10 press releases and 6 press kits produced**

| **10 media tastings** organized by the CIVP with a total of 1,300+ samples

| **2 sample product packs** sent to wine and product reporters, leading to more than 81 media spin-offs



4. WINE EDUCATION

2023 was the first year of the rollout of the national wine education programme dedicated to Vins de Provence wines.

That programme's objectives are as follows:

- | Educate future professionals about Vins de Provence wines, especially Provence rosés
- | Actively communicate the key components of our messaging
- | Neutralize any potential negative portrayals.

In 2023, **more than 360 sommelier and wine students** received this training at nearly 30 schools across France.



5. VINS DE PROVENCE EVENTS FOR PROFESSIONALS

Vins de Provence Expériences 27 & 28 February

A successful first edition of **Vins de Provence Expériences**, a trade fair organized by Vins de Provence, that took place over the course of two days at Marseille's Palais du Pharo. With 180 exhibitors, more than 900 professional visitors, two masterclasses, five themed conferences and three culinary workshops (including one led by Alexandre Mazza, the 3-star Michelin chef), this strong showing proves our ability to unite our three PDOs to attract French and international professionals to our region for large-scale events.



International fairs: Wine Paris and ProWein 2023

Wine Paris, 13-15 February

Vins de Provence had a strong presence at the Wine Paris fair, with a record number of exhibitors – 87 businesses – from the three PDOs. Because of this fair's national and international upsurge (with visitor numbers up 41% to 36,000, of which 38% were international, marking an 85% rise since the pre-COVID era), the presence of Vins de Provence now appears to be vital and essential, particularly since it fits perfectly with our strategy of internationalization. 1,015 visitors from 65 countries stopped by our free tasting area. In addition, the 2023 edition featured the rollout of the new Vins de Provence advertising campaign.

ProWein, 19-21 March

46 Vins de Provence businesses participated in ProWein in Düsseldorf. Although the number of visitors has not yet returned to its pre-pandemic level (down 18.33% compared to 2019), the 100% Provence rosé tasting area was a tremendous success this year, with a 22.93% increase in



visitor numbers compared to 2022. ProWein remains a major event for exports outside Europe, borne out by the fact that 89% of visitors to the Vins de Provence tasting area were international participants.

Vins de Provence Wine Competition 12-13 April

The Vins de Provence Wine Competition is an important event for Vins de Provence members, more than a third of whom participate in it, with 825 wines submitted by 201 businesses in 2023.

193 of our members' wines were rewarded by the judges panel (88 gold medals, 84 silver medals and 21 bronze medals). The competition contributes to our strategy of premiumization and value enhancement, since a gold medal on a wine bottle is a promise of quality that encourages consumers to make a purchase.

Winners' Party, 6 July Clos des Roses in Fréjus

Organized in conjunction with the Var Chamber of Agriculture, this party celebrates the winners of the Vins de Provence Wine Competition and the General Agricultural Competition. This festive evening, which was attended by more than 200 people (including winners of both competitions and guests from the worlds of tourism, politics and economics) showcases our region's excellence and the quality of the work done by Provence's wine-makers and merchants.

6. VINS DE PROVENCE EVENTS FOR CONSUMERS

Côté Caves en Provence 1 July to 31 August

In the summertime, the CIVP offers a game in the form of scratch cards available at winery tasting rooms, designed to liven up the local supply chain and enrich consumers' purchasing experiences. With 204 wineries participating in 2023 and more than 42,000 prizes up for grabs (acrylic wine glasses, sommelier knives, glass wine stoppers, hats, drop stops and more), the Côté Caves en Provence game is popular with everyone from Vins de Provence members to consumers, many of whom flock to the region each summer.

7. COMMUNICATION TOOLS

Promotion items and communication materials available all year long

The development and distribution of communication tools and promotional items help to improve knowledge of the Provence wine region and enhance the image of our collective brand. They are available for our members to order throughout the year.

CÔTES DE PROVENCE SPECIFIC PROGRAMME

1. MEDIA PLAN

In 2023, the Côtes de Provence media plan included the press, posters and digital resources.



Posters: Paris: OOH (310 sign faces at Metro entrances)

PACA: Posters on street furniture and billboards (1,135 sign faces) and 80 screens at train stations in Avignon, Marseille, Cannes and Nice during the summer season.

Press: 16 publications in the national press (2.9 million copies in circulation) and 4 publications in the local press.

Activation on websites and social media, targeting the PDO's reputation and visibility. More than 32 million impressions were recorded.

2. DIGITAL COMMUNICATION & INFLUENCER PROGRAMME

A portion of the content displayed on Vins de Provence social media accounts was specifically dedicated to the Côtes de Provence PDO, to help boost its reputation.



In addition, a special action was run for the Côtes de Provence PDO: a partnership with the Konbini digital media group and Chef Julien Sebbag, in the form of a road trip through the appellation's region. The two videos that were produced and posted on Vins de Provence social media generated close to 2 million views.

COTEAUX D'AIX-EN-PROVENCE SPECIFIC PROGRAMME

1. MEDIA PLAN



In 2023, the Coteaux d'Aix-en-Provence media plan included posters and digital resources.

Event posters at the Aix-en-Provence TGV Train Station and Marseille Provence Airport.

Activation on websites and social media, targeting the PDO's reputation and visibility. More than 28 million impressions were recorded.

2. DIGITAL COMMUNICATION

The CIVP worked with the agency Les Intuitives to manage social media activities specific to Coteaux d'Aix-en-Provence, with the main goals of communicating with a local community over Facebook and developing the PDO's reputation on Instagram.



COTEAUX VAROIS EN PROVENCE SPECIFIC PROGRAMME

1. MEDIA PLAN

In 2023, the Coteaux Varois en Provence media plan included the press, posters and digital resources:

14 publications in the local press and 3 in the national press

Local posters (in Brignoles): 15 sign faces

Activation on websites and social media, targeting the PDO's reputation and visibility. More than 6 million impressions were recorded.

2. DIGITAL COMMUNICATION

The CIVP worked with the agency Com d'Ici to manage social media activities specific to Coteaux Varois en Provence, with the main goals of communicating with a local community over Facebook and developing the PDO's reputation on Instagram.

3. COTEAUX VAROIS EN PROVENCE SPECIFIC PROFESSIONAL EVENT

Anniversary of Coteaux Varois en Provence, 15 June

The 30th anniversary of the Coteaux Varois en Provence appellation was celebrated at Domaine de Blacailoux. It was a wonderful opportunity for actors from the PDO to interact, followed by an anniversary party with more than 200 guests.

INTERNATIONAL COMMUNICATION



USA



Budget
€595,425



176,228 hl
exported in 2023

SOCIAL MEDIA ACTIVITIES - YEAR ROUND

With a revisited editorial tone and a focus on videos, more than 80 content items were produced and posted in service of a strategy of visibility. The campaign reached 937K people in total and generated 1 million video views.

neighbourhoods populated by millennials and in multiple bars and restaurants. The new campaign used large sizes that allowed us to play with details and create a close connection with passers-by. Over the course of two weeks, 65 posting points in New York, Miami and Los Angeles brought us 42 million impressions.

PROVENCE TRIP MAY TO JULY

Three friends set off on a road trip in pursuit of the world's best rosés, embracing the region's lifestyle and meeting with the original creators of Provence's rosé culture. This series was produced for social media and filmed in an immersive, authentic style that combines emotions, experiences, desirability and education. 91 original posts were created, reaching 6.4 million people and generating 21 million impressions.



SOCIAL MEDIA ADVERTISING 25 MAY TO 30 JUNE

Social media continue to be the main point of contact in the US for reaching our strategic target audience of millennials. Adapted into a variety of forms, with strategic targeting, the new advertising campaign exceeded expectations, as evidence of the strong support we enjoy amongst internet users. With a focus on the New York, Miami and Los Angeles markets, the campaign was viewed more than 14 million times.

PROGRAMMATIC CAMPAIGN 25 MAY TO 18 JUNE

This approach, based on strategically placed banners on web pages, gave us a presence on sites that are traditionally visited by our strategic target audience and allowed us to reach additional users outside social media. Whether in static or dynamic form, these banners bearing images from our new campaign were viewed 7 million times.

WILD POSTING 14 TO 18 MAY

This format, which is popular amongst the most cutting-edge luxury brands, gave us a presence in



CANADA



Budget
€249,654



15,117 hl
exported in 2023

SOCIAL MEDIA ACTIVITIES YEAR ROUND

Retaining our focus on Canada's two primary provincial markets, we produced more than 60 posts and published them on Facebook and Instagram, respectively reaching

440K and 790K people. A partnership with sommelier Renée Sferrazza provided the finishing touch, with posts on her account and articles in the magazines *HOLR* and *Addicted*.



POSTERS IN MONTREAL 25 MAY TO 18 JUNE

Rollout of the new advertising campaign at 40 bicycle sharing stations in Montreal and 40 illuminated signs in the city centre, for a total of 41 million impressions.

SOCIAL MEDIA ADVERTISING 26 MAY TO 6 AUGUST

Our advertising campaign (both in English and French) was featured on social media, with an emphasis on the two provinces

with the biggest growth markets for rosé, Quebec and Ontario. The three campaign visuals were played in multiple formats, for a total of 2.5 million impressions.

PROGRAMMATIC CAMPAIGN 9 JUNE TO 6 AUGUST

A means of reaching other communities with our new advertising campaign by placing banners on sites visited by our strategic target audience. With a focus once again on the biggest cities in Ontario and Quebec, this set-up generated 12.7 million impressions.

The three Instagram accounts were active throughout the year, providing a fun way for the millennial target demographic to learn about the PDOs, with 4.5 million potential contacts. Average engagement: 2.4%.

ADVERTISING - APRIL TO OCTOBER

Asocial media optimization (SMO) campaign was implemented to boost the visibility of organic content on Instagram and generate traffic to the campaign's website. Specifically targeting the millennial demographic, it used sponsored posts and Meta advertising to get 18 million impressions.

A mobile advertising campaign was run in Germany, generating traffic to the campaign's website. A banner was placed on premium food, wine and lifestyle apps in a programmatic approach. Result: 24.6 million impressions.

In the Netherlands, multiple educational sessions were organized during the Bacchus Wine Festival in Amsterdam (9-11 June), where visitors were able to taste 11 of our wines.

PROFESSIONAL EVENTS

Masterclasses on PDO rosé wines were given to **72 media and trade representatives** from Germany, the Netherlands and Belgium. On the programme were tastings, food and wine pairings and presentations of key messages (history, terroir, expertise, lifestyle and environmental engagement). 14 wines were represented in these classes.



COMMUNICATION TOOLS - YEAR ROUND

The following tools were produced: a toolbox with key sales arguments and campaign messages for the media and influencers, a decoration kit for local events, and an educational kit for consumers and professionals.

18 short videos were produced and translated into the campaign's three languages. They were viewed 5.9 million times.

EVENTS - MARCH TO JULY CONSUMER EVENTS

Tastings were arranged at local festivals, with a reach of **259,000 consumers, including 37,000 direct contacts**. In Germany, we were at the Eppendorfer Landstrassenfest street festival in Hamburg (3-4 June), where we gave visitors the change to try 10 of our wines. In Belgium, three after-work events were held between May and July at Villa Empain in Brussels (with 16 wines represented).





AUSTRALIA



Budget
€198,825



14,256 hl
exported in 2023

SOCIAL MEDIA ACTIVITIES 14 JUNE TO 15 OCTOBER

Launch of a new Instagram page dedicated to Vins de Provence wines in Australia. Thanks to a modern, sun-drenched aesthetic, based on the brand's graphic charter and 56 posts showcasing occasions for enjoying our wines and the Provençal lifestyle, the account reached 464K people in just five months, with record engagement of 14%.

SOCIAL MEDIA ADVERTISING 28 AUGUST TO 15 OCTOBER

A tactical rollout of the advertising campaign through a selection of geographic areas and user profiles. Over the course of seven weeks, eight audience segments were targeted in Sydney and Melbourne, for a total reach of 1.3 million people and 2 million impressions.



BELGIUM, GERMANY & NETHERLANDS

EUROPEAN PDO ROSE WINES CAMPAIGN "MUCH MORE THAN A COLOUR"

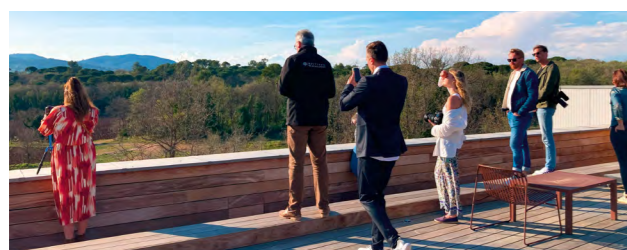


Budget
€672,488

PUBLIC RELATIONS - YEAR ROUND

An information office was tasked with disseminating the campaign's key messages. Six press releases were sent to B2B and B2C media, leading to spin-offs that reached 1.7 million contacts.

In April, six brand ambassadors travelled across the Provence wine region in a vintage van, speaking at events where they relayed the campaign's messages to their followers. Their tour reached 850,000 people.



Nine food and wine influencers created original content and shared it with their followers, seen by a total of 1.8 million people.

Collaborations with 11 key media outlets resulted in high-quality reports that spread the campaign's key messages to our target audience of consumers and professionals. Three journalists travelled to Italy's Valtènesi wine region to learn more about the PDO and its qualities. These media partnerships were able to reach 5 million people.

WEBSITE AND SOCIAL MEDIA - YEAR ROUND

The website for European PDO rosés was fed new content in the campaign's three official languages, where key messages were disseminated along with news about events in the targeted markets. The site reached 2,200 unique visitors. www.pdorosewines.com



UNITED KINGDOM



Budget
€298,755



75,943 hl
exported in 2023

PRESS OFFICE - YEAR ROUND

In 2023, 35 wines registered for Press Office actions were represented in five press releases as well as during regular interactions with British journalists, generating 316 articles in the general and specialized press with a total audience of 180.3 million readers.

SOCIAL MEDIA AND INFLUENCER ACTIVITIES - YEAR ROUND

Mentions of the 35 registered wines in original content, contests and sponsored posts on Facebook, Instagram and Twitter to ensure a dynamic digital presence. Instagram: 108 posts, 67,800 interactions and 10,213 followers (up 37% from 2022). Facebook: 54 posts, 15,300 interactions and 2,393 followers. A collaboration with six influencers to create content (14 posts and reels and 23 stories) reached a combined audience of 279,595 followers and generated 22,000 reactions.

DIGITAL ADVERTISING CAMPAIGN JUNE TO AUGUST

Vins de Provence advertising campaign published on Vins de Provence social media accounts (in posts and stories) and on targeted digital platforms (YouTube, news websites and calendars of events and outings) in the United Kingdom. Creation and posting of videos on those same media. Use of data from advertising platforms to establish contextual and behavioural segments so as to ensure we reach the right audience, in the right place, at the right time. This campaign reached 21.4 million people.

**BILLBOARDS AT BOXPARK SHOREDITCH
MAY TO JUNE**

To roll out our new advertising campaign in an impactful way and reach our core target audience of hedonistic millennials, we installed original, powerful advertising billboards in Shoreditch, one of London's trendiest areas. From 22 May to 4 June, the campaign was rolled out along the entire exterior of the Boxpark shopping centre – covering a total of 110 m² – to give us massive visibility. This rollout was reinforced by a carefully targeted digital campaign on social media that reached 530,510 people.



TRADE MEDIA PLAN – SEPTEMBER TO OCTOBER

A series of advertorials on the topic of premium wine to convince the trade media of the quality of Provence rosés compared to our competitors, published in three major trade publications in the UK: *The Wine Merchant*, *Harper's* and *The Drinks Business*. Those advertorials came out in September and October, so as to reach British distributors during the period when they place their orders for the next season. Total audience reached: 665,000 members of the British trade press.

GERMANY

Budget **€102,974**

23,664 hl exported in 2023

**CONSUMER PRESS MEDIA PLAN
JUNE TO JULY**



We developed a media plan that included powerful, affinity-based publications in the German market, that circulated our new advertising campaign: *Freundin* (women's magazine, circ. 195,402), *Frankreich Magazin*

(lifestyle and tourism magazine, circ. 45,000) and *IDEAT* (décor and architecture magazine, circ. 50,000). Event formats and premium placements have been negotiated with each publication to ensure our presence is even more impactful. Online visibility was also organized in the form of web banners, to maximize the campaign's impact, which generated 583,856 impressions.



**TRADE PRESS MEDIA PLAN
JUNE TO SEPTEMBER**

A media plan was developed for publications produced by the Meininger group, with editorial reports involving wine tastings in *Weinwirtschaft* (circ. 7,000) and *Meininger Sommelier* (circ. 6,400), which were also covered in the Meininger newsletter (26,000 subscribers).

BELGIUM

Budget **€48,645**

16,521 hl exported in 2023

**CONSUMER PRESS MEDIA PLAN
MAY TO JUNE**



A media plan involving three magazines was instituted in order to publicize our advertising campaign: *Le Vif*

Weekend (lifestyle magazine, circ. 156,100), *ELLE* (women's magazine, circ. 45,000) and *IDEAT* (décor and architecture magazine, circ. 14,000). Event formats and premium placements have been negotiated with each publication to ensure our presence is even more impactful. Online visibility was also organized in the form of web banners, to maximize the campaign's impact, which generated 485,189 impressions.

NETHERLANDS

Budget **€54,239**

29,901 hl exported in 2023

**CONSUMER PRESS MEDIA PLAN
MAY TO JUNE**

Development of a media plan involving *Knack Weekend* (lifestyle magazine, circ. 156,100), *Leven in Frankrijk* (lifestyle and tourism magazine, circ. 30,000) and *FD Persoonlijk* (economic magazine, circ. 66,000) to publicize the new

Vins de Provence advertising campaign. Event formats and premium placements have been negotiated with each publication to ensure our presence is even more impactful. Online visibility was also organized in the form of web banners, to maximize the campaign's impact, which generated 320,948 impressions.

SWITZERLAND

Budget **€96,382**

12,940 hl exported in 2023

**PRESS TRIP
SEPTEMBER**

We hosted two Swiss journalists from the specialized and trade press in Provence: Nicole Harreisser and Catherine Duttweiler. The topics addressed during their time here related to the technical aspects of rosé wine production, the high-quality, premium nature of Vins de Provence wines and the environmental approaches in place in our wine region. During their three-day trip, they visited nine wine businesses across all three Provence PDOs: five individual wineries, three wine merchants and one cooperative winery. The journalists were also given the opportunity to visit the Centre du Rosé. Their two articles appeared in spring 2024 (with 836,000 copies in circulation).

(restaurateurs and sommeliers). A newsletter was sent to more than 600 contacts, and a press release was distributed to 152 relevant contacts. The information office also handled individual requests and sent out samples to journalists and tastemakers. The five media spin-offs generated by those sample product packs reached 57,600 people.

**PRESS EDITORIAL EVENTS
MAY TO JUNE**

Six individual meetings were organized between select journalists and actors from Vins de Provence in order to raise awareness amongst the trade press and consumers about our key messages. These virtual discussions were an opportunity to answer questions from the press in real time and give them the chance to taste wines chosen based on the topic of the interview (like terroirs, gastronomy, wine tourism and our leadership in rosé). A total of 18 wines were made available to taste. The three media spin-offs generated by this activity reached 271,000 people. After those meetings, a paid cooperation was established with the Falstaff media platform, in the form of printed editorials, plus newsletters and social media posts, which reached a total of 105,762 contacts.

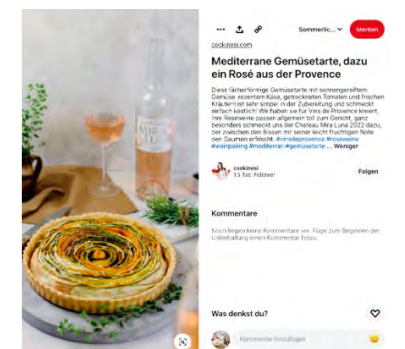


**DIGITAL ADVERTISING CAMPAIGN
MAY TO AUGUST**

Vins de Provence advertising campaign published on Vins de Provence social media accounts (in posts and stories) and on targeted digital platforms (YouTube, Pinterest, news websites and calendars of events and outings) in Switzerland. Creation and posting of videos on those same media. Use of data from advertising platforms to establish contextual and behavioural segments so as to ensure we reach the right audience, in the right place, at the right time. This campaign reached 2.9 million people.

**INFLUENCER COLLABORATIONS
JULY TO AUGUST**

The goal of these collaborations was to expose two influencers to Vins de Provence wines, so they would feature our wines and share their experiences with their social media communities. As a result, we were able to reach potential consumers with interests that go hand in hand with wine, like fine dining, recipes, travel, lifestyle, etc. Six of our registered wines were represented in the 32 posts published on our two partner influencers' social media and blogs, generating 76,385 impressions.



INFORMATION OFFICE – YEAR ROUND

The information office's mission was to continuously communicate with our strategic professional targets: the media, importers, distributors and food tastemakers

REGIONAL COORDINATION DEPARTMENT

The idea for the Regional Coordination Department was devised during the CIVP's reorganization. It was created in January 2022, in line with the Strategic Plan 2022-2024 and the new ambitions of Vins de Provence.

It is dedicated to forging ties with the wine region and with partners in the area, with the following main objectives:

1. Develop relationships between the CIVP's members, elected representatives and staff
2. Disseminate information and communicate better with upstream actors
3. Build and promote wine tourism options for Vins de Provence.

THE REGIONAL COORDINATION DEPARTMENT IS COMMITTED TO FOUR MAIN ISSUES:

1. **Member relations:** After conducting a survey of our members, this year the CIVP developed and implemented an action plan for communicating information and building connections
2. **Coordination of the five Côtes de Provence DGCs:** In 2023, our collective intelligence allowed our wine-makers to revisit the fundamentals of their DGCs
3. **Creation of partnerships:** This year, the CIVP capitalized on our existing partnerships and had the pleasure of welcoming Andreas Larsson, World's Best Sommelier 2007, in the name of our partnership with his YouTube channel, Tasted
4. **Promotion of wine tourism:** In addition to the joint promotion of Vins de Provence wines to regional and national tourism professionals, this year we defined a Vins de Provence wine tourism strategy with the assistance of the agency Emotio Tourisme.

The wine tourism functions are handled by the Wine Tourism Committee, according to the defined strategy and action plan.

The committee is co-chaired by:



Aurélie Bertin
Co-chair
(Trade)



Paul Bernard
Co-chair
(Production)

TEAM



Clotilde Métier
Regional
Coordination
Project Manager



Delphine Moreau
Wine Tourism
Project Manager

MEMBER RELATIONS

In 2022, the CIVP surveyed our members to gain a better understanding of their expectations and needs. This year, we introduced a strategic plan and a programme of actions in response to the results of that survey.

A THREE-PRONGED STRATEGIC VISION



The multi-year action plan includes:

- Events where members can connect
- Tools for communicating and transmitting information
- A strategy for onboarding new members.

With this in mind, our Wine-maker Happy Hours made their first appearance, attracting more than 50 wine-makers in 2023: <https://www.youtube.com/watch?v=4-slad-pwo8>.

Our Wine-maker Happy Hours aim to cultivate a sense of community and encourage discussions on specific topics. They will be supplemented by themed meetings where experts, wine-makers and the CIVP's teams can delve deeper into the subject.

APÉRO Vignerons



20 June: Wine-maker Happy Hour on techniques at Château de Majoulière (Coteaux Varois en Provence) in Villecroze



29 November: Wine-maker Happy Hour on exports at the Terra Provençala collective winery (Côtes de Provence) in Puget-Ville

WINE TOURISM ACTIONS

VINS DE PROVENCE WINE TOURISM STRATEGY

Wine tourism is one of the five priorities in the CIVP's Strategic Plan. **Wine tourism is the top showcase for Vins de Provence:** we are well aware that the experience of grapevines and wines is better in Provence! Assisted throughout the year by Emotio Tourisme, a consultancy specializing in tourism and wine tourism, we worked on our context and observations in order to define our issues, our ambition, our targets and objectives, our positioning and key messages, the development and presentation of our wine tourism options, and actions for us to put in place. We brought in actors from the wine region and the field of tourism during two days of brainstorming to help us establish this strategy.

CONTEXT AND OBSERVATIONS

Provence-Alpes-Côte d'Azur (PACA) is a very popular region with tourists. And the Provence wine region is a renowned specialist in rosé. Wine tourism is on the rise and provides the chance to develop direct and indirect revenue streams. It is also a tremendous opportunity for the wine region to offer activities linked to the discovery of its wines and for wine-makers to increase their revenue. The organization of wine tourism in Provence is complex, involving a multitude of actors and areas. The challenge is to work with those actors to make Vins de Provence wine tourism offerings fully intelligible.

IDENTIFIED ISSUES

1. How can we make Vins de Provence wine tourism options visible and intelligible?
2. How can we boost the alignment between the collective image of Vins de Provence and the wine tourism experiences available at our vineyards and wineries?
3. How can we unite tourism organizations around these offerings and the Vins de Provence brand?



OUR AMBITION IS TO DEVELOP A WINE TOURISM REFLEX TOWARDS VISITORS TO PROVENCE

Our wine region should be a must on their trips to Provence. Our positioning will be based on **four differentiating factors** that will allow us to capitalize on the points that make us stand out from other wine regions:

1. **Rosé:** Our wine region's speciality and expertise, as well as occasions for enjoying our rosés
2. **Provence:** The beauty of its scenery, its authenticity and its substantial evocative power (archetypes/clichés, holidays, lifestyle and slow tourism)
3. **Culture:** Paintings, art, architecture, film and crafts
4. **Climate:** Mild climate, natural light, exteriors and terraces.

Our promise: Discover Provence in a whole new way

Exploration of Provence, with the wine region and rosé wine as pillars of Provençal culture.

Organization of our wine tourism options

Tourists do not come to Provence for a single appellation. They come to a whole area. So, we need to anchor ourselves in the area identified by tourists and engage with them on that level. The Vins de Provence wine region will be organized into areas that are easy for tourists to understand.

Our action plan: Targets & objectives

AIMED AT TOURISTS AND OTHER VISITORS: Make Vins de Provence wine tourism options visible and intelligible by creating a website dedicated to those options.

AIMED AT PARTNERS: Get our tourism partners to grasp the notion that rosé wine and wine tourism in Provence go hand in hand, and then incorporate that message and our positioning in their tourism communications. Educate them and transform them into points of connection with tourists.

AIMED AT THE WINE REGION: Convey our conviction that rosé wine is a form of expertise to Provence's vineyards and wine-makers. Initiate substantial educational efforts for their public-facing staff to help them master the skill of talking about their expertise, education, hospitality and exploring the wine region.



Day of brainstorming to define our wine tourism strategy

LE FASCINANT WEEK-END

3rd week-end in October - Thursday to Sunday, 19-22 October 2023

Created in 2019, Fédération Vignobles & Découvertes currently represents no fewer than 72 wine destinations that are involved in wine tourism and that have earned the Vignobles & Découvertes label. Its missions include promoting the label and its quality standards to the broadest possible audience. To that end, Fédération Vignobles & Découvertes fully backs the major wine tourism event that is Le Fascinant Week-end. It is a fantastic way for the federation to support the desire shared by all wine regions to extend a regular

invitation to the general public to visit different their vineyards.

Each year, the programme of activities for Le Fascinant Week-end covers seven main themes: sport; culture, music and heritage; gastronomy; families; off the beaten track; all about wine; and evening entertainment. All the activities on offer bear the hallmarks of curiosity, eccentricity, hospitality and friendship!

Since 2021, vineyard destinations in Provence with the Vignobles & Découvertes label have united to communicate about this event and bring it to life. In 2022, Var Tourisme (the Var tourism development

agency) allocated a sizeable budget to help the event take root in the region.

OVERVIEW OF 2023: Nationwide, there were 65 participating destinations, 9 geographic regions, 17 geological regions and 40,000 estimated visitors. In Provence Bandol, for our seven Vignobles & Découvertes destinations, there were 84 participating partners with the V&D label, 135+ activities provided and 4,472 estimated visitors, up 66% from 2022.

New dedicated website _____
fascinantweekend-provencebandol.fr



Press conference launching Le Fascinant Week-end 2023

PARTNERSHIPS AND OPPORTUNITIES

The CIVP is committed to its region, supporting local initiatives from wine festivals to cultural associations and events, by means of a sponsorship programme that offers funding, products and branded items.

Key figures

- | 43 events supported
- | 1,949 goodies distributed
- | 721 bottles tasted

VINS DE PROVENCE PARTNERSHIPS

| La Maison: Many Vins de Provence members supported this palliative care facility in Gardanne by donating nearly 400 bottles for its auction off. In total, 1,000 tickets were sold, there were 76 winners and the facility raised €20,000. The proceeds from the auction were wholly devoted to the well-being of La Maison's residents.

| Cooparade: For its ninth edition, the Cooparade went regional. On 18 July, on Place de l'Escalet, at the Old Port in La Ciotat, cooperative wineries from across the region to give visitors the chance to taste their wines.



| Tasted: In May, it was our pleasure to host the World's Best Sommelier 2007, Andreas Larsson, who tasted 30 reds and 38 whites from Provence... on film! Check out his impressions in this video: <https://youtu.be/u54LQYnO53Y>.



| La Cité du Vin: Once again this year, the winners of the Vins de Provence

Wine Competition were available for visitors to taste at La Cité du Vin in Bordeaux.

CÔTES DE PROVENCE PARTNERSHIPS

| Rallye Sainte-Victoire: On 21 October, the 20th edition of the flagship Côtes de Provence Sainte-Victoire event attracted 856 participants over the course of the day.

| Balades Gourmandes: The 13th edition of this Côtes de Provence Pierrefeu event delighted more than 400 people along the 6 kilometre walk with stops at 14 individual and cooperative wineries.

https://www.youtube.com/watch?v=BcSnZShyR_Q&t=4s

| Just'Rosé Sanary: After a three-year pause, some 80,000 visitors and 72 wine-makers gathered for this three-day event.



| Châteauvallon-Liberté: Côtes de Provence also supports art and culture through a partnership forged several years ago with the Châteauvallon-Liberté national theatre in Toulon. Tastings are held at the three annual theme nights at Le Liberté theatre. Côtes de Provence is also a partner of the Châteauvallon Summer Festival.

COTEAUX D'AIX-EN-PROVENCE PARTNERSHIPS

| Vasarely Foundation: Coteaux d'Aix-en-Provence is continuing its partnership with this foundation, contributing to the restoration of works of art.

| Eloquence Festival: The 9th edition of Eloquence Days took place in Aix-en-Provence between 13 and 20 May 2023, addressing the theme of music.

| Coteaux d'Aix-en-Provence Wine Festival in Rognes: This year's festival took place on Sunday, 23 July 2023.

| Bouches-du-Rhône Fête de la Vigne et du Vin: On Saturday, 20 May, 25 wineries and vineyards came together to promote not only wine, but also vine and wine careers.

COTEAUX VAROIS EN PROVENCE PARTNERSHIPS

| Foire de Brignoles: The 94th edition of this fair attracted nearly 45,000 visitors.

| Rallye Découverte des Coteaux Varois en Provence: 150 people in 75 cars participated in the 8th edition of this navigational rally on Sunday, 4 June.

| Soirées Musicales de l'Abbaye de la Celle: This year's musical evenings took place between 22 July and 10 August.

CÔTES DE PROVENCE DGC SPECIFIC PROGRAMME

The CIVP and the Syndicat des Côtes de Provence collaborated on a programme of actions aimed at strengthening the five Côtes de Provence terroirs. After getting the presidents' buy-in on the observations and shared ambitions, a three-step plan was developed:

1. **Strengthen the group** by working on the DGCs' identities, a common message and a sense of belonging
2. **Educate local tastemakers** to expand their knowledge of the five terroirs
3. **Bolster the DGCs' reputations** amongst local consumers.

For the first step in this action plan, the CIVP and the Syndicat des Côtes de Provence pooled their collective intelligence with the DGCs' wine-makers in order to define identities for their terroirs and the appropriate language to describe them.

EACH WORKSHOP WAS DIVIDED INTO THREE PHASES:

- | A landscape approach to help understand the natural environment
- | A narrative approach to identify the bonds that unite us and pursue our common interest
- | Discussions of the future to come to an agreement on objectives and next steps.



In total, five workshops were held with more than 50 participating wine-makers.



The next step will be to bring wine-makers from the five terroirs together to discuss possible joint actions. That meeting, which is slated for November 2024, will be a chance for those wine-makers to learn about their neighbouring terroirs and further bolster cohesion between the top-notch terroirs of Côtes de Provence.



CONSEIL INTERPROFESSIONNEL
DES VINS DE PROVENCE



www.vinsdeprovence.com

MAISON DES VINS

RN 7, CS 50002, 83460 LES ARCS-SUR-ARGENS, FRANCE

+33 (0)4 94 99 50 10 – CIVP@PROVENCEWINES.COM

SIRET: 451 070 197 00012 – APE code: 9499Z