#PEVI2030

ARGENTINIAN VITIVINICULTURAL PLAN

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CORPORACIÓN VITIVINÍCOLA ARGENTINA

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PRÓLOGUE

Argentinian Vitivinicultural plan

The update of the Strategic Vitivinicultural Plan (PEVI) is not only a reality but also the result of the collective work of more than two years, where all the actors and institutions of Argentine viticulture, public and private, were summoned to add their contribution and critical perspective.

Argentine vitiviniculture has a plan, which belongs to everyone, and which expresses the decision to jointly design comprehensive actions that promote development and innovation. And, above all, which result from the commitment articulation of the entire productive and institutional framework. Strengthening the value chain definitely means to provide the best conditions for each link, with common good as guiding idea to face challenges and enhance opportunities that will be presented to us in the next ten years.

As a productive sector, Argentinian vitiviniculture consolidates a process of social innovation and unprecedented strategic planning that began with the 21st century and which was legitimized in 2004 with the unanimous approval of National Law 25,849. Now, this path adds a fundamental pillar by updating and expanding its axes and objectives. And it refocuses them based on the learning, achievements and necessary adjustments along with the critical and constructive reading of an activity currently present in 18 provinces, which is diversifying and growing.

In 2018 we began to think about this updating instance and it was INTA (National Institute of Agricultural Technology) that assumed the methodological leadership in order to design an open, participatory and democratic scheme that could reach all producing regions and actors in the field. Thus, during 2018 and 2019 a team of more than 30 technicians, professionals and leaders, from public, private and academic sectors, summoned producers, entrepreneurs and representatives from all wine-growing areas to the creation workshops of this plan, open working areas where needs, problems, criticisms, and proposals were identified; and where this roadmap was created and enriched with the participation and debate open to scientific, business, productive and professional entities from all over the country. More than 1,500 references from the entire wine industry chain, together with the invaluable contribution of the wine provinces governments as well as National State organizations, added their considerations to the working documents. In 2020, with a reality marked by the COVID19 pandemic, this process continued virtually, always searching for consensus as the articulating axis.

The plan for Argentinian vitiviniculture for the next ten years expresses the perspective of the actors who contributed to the debate and a collective construction, transcending its partial reality. We are aware that in the new local and global scenarios, planning is the only possible tool to guide the efforts of both public and private sectors, guiding the definition of public policies in an efficient mechanism of public and private articulation. The updating of the Wine Strategic Plan is a participatory open learning process of continuous improvements, which defines strategic objectives and specific action lines based on values such as respect for diversity and plurality of actors, economic, social and environmental sustainability from primary production to world markets. It considers integration with a broad horizon. close in time and with defined measurable and quantifiable goals. Besides, it innovates with a special focus on the environmental, social and the energizing effect that wine tourism has.

PEVI2030 is the future vision of Argentinian viticulture. It sets ambitious but achievable goals, which are necessary to organize and direct efforts. It marks a plural path where everything and everyone is strengthened by the inclusion of the parts, seeking the common good of viticulture.

This plan proposes to lead a virtuous process of institutional quality again. It defines a strategy to enhance all the capacities of the wine chain, embodied in the work and talent of each man, woman, family and company that makes up the great Argentine wine industry.

Executive Board
Corporación Vitivinícola Argentina

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY
This plan has been created for all the actors involved in the sector, such as producers of, table grapes, raisins, wine producers1 , juice and must factories, traders of vine derived products for both internal and external market, goods and services suppliers, wine tourism actors, institutions and governments. Information has been collected, analyzed, processed and summerized to develop this plan for 18 months, emphasizing the importance of achieving broad participation of all the actors from different sectors.

While preparing this update, we have reflected on the achievements made within the framework of the 2020 Strategic Plan and analyzed what had to be accomplished and what could be improved in the future. In this plan, the vision is on sustainability and it establishes the mission and values on which it will develop the actions to be achieved .

Vision

"Argentinian vitiviniculture will be a sustainable and diverse activity, which will encourage the development of its actors, respond to consumers dynamics and create new opportunities for the market and for the communities where it is developed"

Mision

"Argentinian vitiviniculture offers competitive products, recognized for their consistent quality and for the value generated at origin, their territorial and cultural diversity and extensive socio-productive network"

The plan suggests six Strategics Aims to achieve economic, enviromental and social sustainability

FOREIGN MARKET AIM
To increase the volume and value of exports and markets of bottled wine, in bulk wine, concentrated grape juice, table wine, raisins and other subproducts.

DOMESTIC MARKET AIM
To increase the domestic consumption of wine, grape juice, must, table wine and other vine subproducts.

PROFITABILITY, PRODUCTIVITY AND QUALITY AIM
To improve the distribution of added value in wine sector, encouraging productivity and efficiency in primary and essential production as well as quality of wine subproducts

WINE TOURISM AIM
To promote and develop wine tourism in all viticultural regions of the country, highlighting historical, geographical and cultural background.

SOCIAL AIM
To promote social sustainability in viniculture by including all the actors and using innovation, interaction and education, in order to strengthen the social capital of all the wine making territories.

ENVIRONMENTAL AIM
To promote the optimization of resources through sustainable models in primary production, industries and consumption, considering the life cycle of wine subproducts.

For each objective, the plan also suggests useful indicators for monitoring and following up on them.

To achieve the aims and cross-cutting objectives, the plan establishes four Strategies:

TECHNOLOGICAL AND ORGANIZATIONAL STRATEGY
It includes research, innovation and development actions, understanding innovation as a socio-technical process of continuous change , in the form of production, trade and organization, respecting and taking care of the environment as key to contribute to a decent life.

INSTITUTIONAL AND ARTICULATION STRATEGY
It includes actions destined to create and strengthen participation and agreement spaces within area institutions and organizations . It also encourages a stronger national and international public- private articulation that favors sustainability and competition in the sector.

ASSOCIATION AND INTEGRATION STRATEGY
It includes actions to raise horizontal and vertical integration,and association processes that improve negotiations,participation and representation in consultation spaces, which promote innovation processes.

PROMOTION AND COMMUNICATION STRATEGY
It includes actions that promote and communicate the origin and identity of products, diversity of regions, wine tourism experiences, as well as environmental and social sustainability of primary and industrial production.

Actions to communicate the plan and the strategies are also included.

In the midst of this update, the outbreak of COVID19 changed the scenario around the world. However, the sector harvested, produced vine subproducts, marketed them in the domestic market and also exported them. The medium and long-term impacts of the pandemic on the sector are not yet known in detail. Despite this situation, the plan proposes a work agenda for this important agro-industry of the Argentinian Republic, which is built every day, and which aims to improve its positioning at a national and international level. After the pandemic, it is meant to present this plan in the different wine regions of the country, in order to reach consensus, improve it and consequently, prioritize actions to achieve the objectives, taking into account the characteristics of each region.

INTRODUCTION

Argentinian vitiviniculture production has always been one of the most relevant activities in the country. It is characterized by the diversity of actors and products, the different regions and the optimal agro ecological conditions for grape production.Wine has become the Argentinian icon in the world, and it has been declared a national drink.

In 2019 the cultivated area reached 215,169 hectares, distributed in 23,668 vineyards and including 17,585 producers. Through the years, Mendoza has remained in outstanding position in terms of cultivated area (around 70%) followed by San Juan (21%), La Rioja, Salta, Catamarca, Neuquen, Rio Negro and other areas with minor participation.

In that same year, 25,198,862 qq of grapes were harvested, mainly those for wine making and must (92,1%), fresh consumption (5,7%) and grapes (2,2%). In the 2019 harvest, wine making factories received 47,2% of red grapes, including Malbec as the biggest cultivated area,(44,301hectares) 32,4% pink grapes and 20,4% white grapes. It is important to mention that worldwide, Argentina is placed in ninth position in terms of consumption per capita, eighth position as grape producer and fifth as wine producer and tenth as wine exporter.

The wine sector is characterized by a group of connected organizations which represent the diverse sectors of the productive chain and the articulation with national and provincial governments. This variety of entities demands coordination and agreement efforts.

The vitivinicultural sector is one of the few agroindustrial areas of the country that created and put into practice a strategic plan with a vision for 2020 (PEVI 2020).In order to implement it, National Law 23848 created COVIAR (Argentina Vitiviniculture Corporation), as a non-state public law legal entity, for management , coordination and

implementation.

The update of PEVI 2020 with a horizon to 2030, finds COVIAR in a context of deep and fast changes, which affect systems and productive models. This represents not only a challenge but also a need to transform our vitiviniculture into a sustainable activity. For this reason, the actors in the sector understand that having a strategic plan is essential to face difficulties as well as opportunities and anticipate changes to promote development.

The premise for this update has been the participation of all the actors of the vitivinicultural sector, the revision of its aims and strategies according to the changes in context and productive, technological, organizational, economic and social paradigms.Connected to strategic actions in the first stage of implementation, and considering the particularities of each region, each one of them will have to define the main actions in terms of impact, importance and achievement.

This guide, which will be frequently revised, will be used for the following 10 years.

This plan guides Argentinian vitiviniculture to set aims that favor social , economic and environmental sustainability through strategic actions in order to create a vision of diversity, committed to the development of the sector and the creation of new market opportunities .

Context

International situation

An analysis of the trends in the global surface area of vines over the last decade shows that Europe has stabilized at 3.8 million hectares, which shows a balance between eradication and new plantations. In Asia, the surface area has remained constant due to the slowdown in expansion in China over the last decade, coupled with the fall in surface area in Iran and Uzbekistan, which is offset by the increase in India and Russia. In America, the United States, Argentina and Chile have seen a steady decline in their vineyard area since 2015, with a cumulative fall of 2.5%. However, Peru's performance is noteworthy, with an increase of 45.4% in that period, reaching more than 48,000 hectares. In Africa and Oceania, the area has remained unchanged.

On the one hand, world wine production in the last decade has fluctuated between 250 and 290 million hectolitres. The world wine market is stable at 244 million hectolitres.

Consumption is declining in net exporting countries, while it is increasing in net importing countries. This is driving a slightly growing international trade. On the other hand, there is a convergence in annual per capita wine consumption, which, according to studies carried out in 23 consumer countries, could be close to 24.4 liters per capita per year.

In the last decade, bottled wine has shown a stagnation in exports, both in volume and value, in all net exporting countries with the exception of Chile, which increased its exports by 80% in volume, decreasing its average price by 40%. In the case of concentrated grape juice or must, there is a slight growth driven by its use in fruit juices, although there is strong competition from concentrated apple juice.

New trends show signs of change, driving a transformation towards the “natural/organic”, with functionality or with less industrialization.

The greatest export opportunities for concentrated must are in the Latin American and Asian markets.

In the raisin sector, world production has increased over the last 10 years. The main producing countries are Turkey and the United States, which account for 42%. This is a highly internationalized market, with around 60% of exports.

In the table grape sector, world exports have increased by 34% over the last 10 years. Chile continues to be the world's leading producer and exporter, with its exports accounting for 14% of the market. Peru's performance in this market is noteworthy. Its exports of table grapes grew by 682% in this period, positioning it as the second largest producer and exporter in the southern hemisphere.

Foreign Market

Since 2010, the dynamics of the Argentine externa market for wines and concentrated must have been, in general terms, positive.

Wine exports increased 13.8% in volume between 2010 and 2019, but with differences between bottled and bulk wine. The former decreased 9.5% in volume while the latter increased 161%.

Exports of concentrated must increased 53%, raisins 59.3% and table grapes decreased by 90%.

Looking to the future, the external market will become increasingly competitive. Many countries have better trade agreements and macroeconomic policies which create a favorable scenario for them.

In this framework, environmental and social sustainability will be a necessary condition for the export of vine derived products.

China and other Asian countries appear as markets that can show a significant and sustainable growth in consumption towards 2030. Although China produces more and more wine, it is foreseen that it will not be able to satisfy its growing internal demand nor will it have any surplus to export.

The trend towards premium wine will continue, the price perbottle in world exports is increasing, while the average world per capita consumption is falling.

Domestic Market

In 2019, Argentina ranked ninth in the world ranking of consumer countries, which is a mature and highly competitive market.

Since 2010, annual per capita consumption has decreased by 21.7% , reaching 19.5 liters per capita per year in 2019. Besides, per capita spending on wines decreased, too. Some studies show that consumption in the youth segment and low frequency among regular consumers are the two main leakage points that explain the fall, based mainly on a diffuse and complex message.

In the concentrated must sector, a low profitability of the business can be foreseen, there is no vertical integration towards primary production that allows improving its productivity. On the market side, the products do not have trademark or patent protection and operating costs are

relatively high. The domestic market for must is very small, which allows us to foresee a situation of potential growth.

Similarly, the domestic market for raisins and table grapes is very small, with low per capita consumption levels and potential for growth.

In March 2020, COVID-19 was declared worldwide, and mandatory social isolation measures were promoted. This accelerated the development of e-commerce business strategies which were very well received by the public, facilitating penetration into different markets and trading of significant volumes.

Production

On the one hand, there is a tendency towards a decrease in the surface area planted with vines, with fewer producers in strata below 10 hectares and an increase in the average surface area of vineyards. On the other hand, there was a change in the productive matrix due to both, suitability and color of grape varieties. In the period from 2010 to 2019, the surface area of the varieties suitable for winemaking decreased by 1.3%, but there was an increase of the ones suitable for raisins (20%) and for fresh grapes (0.5%). In this same period, the surface area of red grapes, which are in greater demand, increased by 11.59%, while the white and rosé varieties decreased by 15% and 11%, respectively.

The analysis of the price of grapes per kilo(U$S) shows a decrease, which has reduced profitability and caused a process of disinvestment in the primary sector, that is reflected in performance below productive potential.

This situation, in addition to putting the economic sustainability of companies at risk, makes modernization and the incorporation of technology difficult. Most of the income from the wine business remains in the value-added and product marketing link.

On the other hand, there is a continuous advance in the mechanization of the harvest of grapes for wines and musts, carried out mainly by service providers. In the province of Mendoza, in 2020, 18% of the production was harvested in this way. In the province of San Juan, 20% of the production is harvested mainly with assisted or mechanical harvesting methods.

In the raisin sector, there is a trend towards a change in the production system from the traditional one to the plant-dried system (DOV), especially in San Juan and La Rioja.

The following chart shows the main variables of national viticulture, comparing two selected years (2010 and 2019) and highlighting their variations.

Table 1: Main variables of Argentinian viticulture

VARIABLES	UNITS	2010	2019	CHANGE
PRIMARY PRODUCTION SITUATION				
Surface	Hectares	217.750	215.169	- 1,2%
Number of vineyards	Vineyard	24.780	23.668	-4,5%
Proportion of vineyards with less than 10 ha	Average	78,8%	77,7%	- 1,4%
Red grapes surface	Hectares	103.684	115.704	11,6%
White grapes surface	Hectares	51.764	43.995	- 15%
Rose grapes surface	Hectares	62.302	55.470	- 11%
Harvest and destination				
Harvested grapes	Quintals	26.196.906	25.198.862	- 3,8%
Grapes introduced into factories for wine making and must	Quintals	25.389.249	24.248.930	-4,5%
WINE AVERAGE PRICE				
White	US$/Kg	0,22	0,10	- 54,5%
Rose	US$/Kg	0,21	0,11	- 47,6%
Red	US$/Kg	0,40	0,21	- 47,5%
Fine quality	US$/Kg	0,71	0,39	- 45%
INDUSTRIAL PRODUCTION SITUATION				
Number of enrolled wineries	Amount	1.330	1.204	- 9,5%
Number of wine making wineries	Amount	984	883	- 10,3%
Wine making	Hectoliters	16.250.768	13.019.472	-20%
White	Hectoliters	6.153.272	3.389.157	- 45%
Rose	Hectoliters	594.088	281.447	-52,6%
Red	Hectoliters	8.705.005	8.581.281	- 1,42%
Other	Hectoliters	798.403	767.587	- 3,9%
Must and Grape juice making	Hectoliters	3.482.714	5.523.195	58,6%
DOMESTIC CONSUMPTION				
Wine per cápita consumption	liters/cápita	24,9	19,5	-21,7%
DOMESTIC MARKET BOTTLED WINE SALES				
Domestic market per bottle type	Hectoliters	9.731.714	8.852.593	- 9%
Multi Laminated	Hectoliters	3.906.797	3.516.466	-10%
Bottle	Hectoliters	5.161.057	5.009.477	- 3%
Demijohn	Hectoliters	659.390	313.115	-52,5%
Others (Bag in box, can, others)	Hectoliters	4.470	13.535	202,8%
EXPORTS				
Wine foreign market	Hectoliters	2.744.311	3.123.563	13,8%
Wine in bulk exports	Hectoliters	462.711	1.207.824	161%
Bottled wine exports	Hectoliters	2.116.249	1.915.739	-9,5%
Concentrated must exports	Tons	91.133	139.435	53%
Raisins exports	Tons	23.227	37.000	59,3%
Fresh grapes exports	Tons	49.992	5.027	- 90%
Concentrated must exports	Tons	91.133	139.435	53%
Raisins exports	Tons	23.227	37.000	59,3%
Fresh grapes exports	Tons	49.992	5.027	- 90%

Productive regions

Argentina has significant regional wealth, with a characteristic imprint that shapes a diverse national viticulture.

MENDOZA EASTER ZONE

Including the departments of La Paz, Santa Rosa, Rivadavia, Junín and San Martín, it ranks first in cultivated surface area, number of vineyards, producers and wineries. Since 2010, it has suffered a loss of 5.9% in surface area and 6% in vineyards, the average vineyard size has not changed at 9.5 ha and the number of wineries decreased by 23.6%. The surface area of red varieties increased by 7.4%, while the rose and white varieties decreased by 14.8% and 14.6% respectively. Vineyards cover 63.5% of the surface area. The Eastern Zone represents 29.8% of the total surface area under

UCO VALLEY ZONE

Another wine-producing area is the Uco Valley, made up of the departments of San Carlos, Tupungato and Tunuyán with 73.6% of the surface area less than 20 years old and oriented towards fine wines. It was one of the destinations for foreign capital that invested in viticulture from the 1990s onwards. There are large wine-producing ventures, with capital-intensive production (drip irrigation and more than 42.5% of production with mechanical harvesting),and with espalier as the predominant conduction system (87.5% of its surface area). At the foot of the Andes range, this area has a significant tourist integration and it is the only one in the province where the number of wineries has grown in the last decade. The Uco Valley represents 13.3% of the surface area under vine in Argentina.

SOUTHERN MENDOZA ZONE

The Southern Zone of Mendoza, made up of the departments of San Rafael and General Alvear, is characterized by traditional small-scale vineyards, 91% of them with less than 10 ha and with lower performance than the general average, less than 60 qq/ha. The 35% of its surface corresponds to a mixture of rose varieties and Pedro Giménez (varieties suitable for must), but in recent years it has gone through a reconversion process towards red varieties, with Malbec being the one that has increased its surface area the most since 2010. The Southern Zone represents 7.8% of the surface area under vine in the country.

MENDOZA CENTRAL ZONE

The central zone is made up of the departments of Luján de Cuyo, Maipu, Guaymallen and Godoy Cruz. It is undergoing a process of urbanization, reflected on a 1.6% decrease in the surface area and a 15% decrease in the number of vineyards since 2010. The vineyards that remain reflect a predominance of capital-intensive systems (irrigation + mechanization). Harvest mechanization has increased in recent years, reaching 31.7% of production in 2020. It is the second most important area in terms of the number of wineries. The Central Zone represents 12.7% of the surface area under vine in Argentina.

MENDOZA NORTHERN ZONE

The Northern Zone of Mendoza is made up of the departments of Lavalle and Las Heras. It has maintained traditional agricultural production structures with a decrease in the cultivated surface area of 797 ha, out of a total of 14,595 ha since 2010. The number of vineyards decreased by 2.3% in that period. It is an area with high yields, higher than the provincial average. The Northern Zone represents 6.8% of the surface area under vine in Argentina.

SAN JUAN PROVINCE

San Juan is the province with the greatest diversification of vine derived products. The 71% of the surface area is covered with varieties which are suitable for making wine and/or must and 29% is suitable for raisins and fresh consumption, area in which it leads national production. It has 110 wineries, 28.3% more than in 2010 and the trellis system predominates (87.5%). San Juan represents 21.1% of the area cultivated with vines in Argentina .

LA RIOJA AND CATAMARCA PROVINCE

The provinces of La Rioja and Catamarca are characterized by small-scale production and they have the smallest average vineyard area in Argentina. In La Rioja, 73% of vineyards are less than 2.5 ha with an average size of 5.7 ha. In Catamarca, 68% of vineyards are less than 1 ha and they have an average area of 2.1 ha. In both provinces, the total area increased compared to 2010. However, there was a decrease in the number of vineyards in La Rioja and an increase in the number of vineyards in Catamarca. The wine industry remains diversified, mainly focused on raisins and wines. The trellis system predominates (80.2% in La Rioja and 63.5% in Catamarca) and its yields are among the lowest in the country. Wine tourism has experienced significant growth in recent years. In La Rioja, 3.5% of the surface area of Argentina is cultivated with vines, while in Catamarca, 1.3%

SALTA, TUCUMÁN AND JUJUY PROVINCES

In the wine-growing areas of the provinces of Salta, Tucumán and Jujuy, the cultivated surface area has grown by 32% since 2010, especially due to the implementation of trellis guided Malbec . In the same period, the number of wineries producing grapes increased from 32 to 50. Of all these areas, Salta concentrates 95% and together they represent 1.6% of the surface area under vine in Argentina

PATAGONIAN REGION

In Patagonia, made up by the wine-growing areas of the provinces of Neuquén, Río Negro, Chubut and La Pampa, Malbec, Pinot Noir and Chardonnay planting has increased since 2010. The vines are predominantly trellised (87%) and their performances are the lowest in the country. Due to its international recognition, a large number of tourists come to this area, which represents a potential for the development of wine tourism. Patagonia represents 1.7% of the surface area under vine in Argentina.

OTHER PROVINCES

Regarding other producing provinces, such as Córdoba, Buenos Aires, San Luis, Entre Ríos, Misiones, Santiago del Estero and Santa Fe, there is a growth in the surface areas with a marked tendency towards integrated ventures with wine tourism, which allows for improved added value of the business. These provinces represent 0.29% of the surface area cultivated with vines in the country.

Environmental issues

Currently, there is a growing concern in society about caring for the environment. The environmental, economic and social changes that have occurred in recent years in general, and in winemaking in particular, require producers, companies and authorities to have a high capacity for adaptation. For this reason, the international wine sector faces the challenge of incorporating the 2030 agenda of the UN Sustainable Development Goals (SDG).

A characteristic of Argentine winemaking is that all grapes are produced under irrigation and, in the last ten years, the main wine-producing provinces have suffered a severe water crisis, which makes the management of water resources essential. Sustainable Development Goal 6 considers implementing integrated water resource management, water-efficient technologies and green technologies at all levels.

This produces little waste and low carbon emissions,it uses clean and efficient energy, reduces environmental impact based on circular economy, respect for biodiversity and avoids air, water and soil pollution.

But there is also uncertainty about the effects that climate change will have on the sector. In this regard, UN SDG 13, considers improving education, awareness and human and institutional capacity in relation to climate change mitigation, adaptation , reduction of its effects and early warning.

On the other hand, consumers demand guarantees that products are safe and harmless. From this perspective, the world is moving towards the universalization of standards that allow consumers to be satisfied. This is why the Agreement on Technical Barriers to Trade (OTC) recommends that WTO members make the greatest use of international standards in order to prevent unnecessary obstacles for the free circulation of goods. Although voluntary environmental standards (Footprint C, ISO 14000) and ethical standards (Fair Trade, BSCI, CSR) have been worked on and incorporated in the Argentinian wine sector, consumer demands and society's expectations in these aspects continue to grow. Compliance with environmental standards and certification of standards is harder for the actors who receive lower income in the chain.

Social aspects

The average age of primary producers is 61 years, which shows the generational change problem that the sector faces. Considering winegrowers, 51.5% of them have one or more young children (16-40 years) of which 72.9% indicate that at least one of them could continue in the activity. But because of the low profitability, sometimes producers themselves discourage their children from continuing with viticulture and encourage them to look for other alternatives.

The low profitability is explained by a series of structural problems that producers of the wine sector present. Among them , it is the scarce integration or organization, which does not allow them to reach a scale sufficient enough to negotiate with wineries and input suppliers. The prices they receive for their grapes tend to decrease in real value because in many cases, producers cannot invest to allow them to generate added value and thus deseasonalize the supply of their products. In addition, there is a lack of commercial transparency regarding the destination of the grapes and payments are made over long periods.

The participation of women in the wine sector has increased in recent years. However, only 10% of managerial or hierarchical positions in the sector are occupied by women.

Employment dynamics are related to technological and organizational changes. Innovative firms generally increase their workforce, while non-innovative firms show a contraction in it. These processes demonstrate the importance of having workers with the appropriate skills and knowledge to carry out activities.

In primary production, there is a predominance of family work in small and medium-sized enterprises, although it is also combined with permanent and temporary labor to a lesser extent.

The largest companies employ the least family labor and the most permanent and temporary workers. Trends in the labor market are focused on changes in the profiles required towards employees with higher qualifications, greater specialization and more participation of women in all activities

In recent years, many activities have been outsourced to reduce costs, workplace risks and save time and effort in personnel management. And also, to improve the organization of cultural tasks and have a workforce at the right time and with sufficient knowledge. A new model of company management is observed, which combines characteristics of the traditional model of personnel recruitment with the new human resources coaching.

On the other hand, greater labor flexibility will come from the increase in outsourcing and subcontracting of work with high employee turnover, either by their decision or by company policies. More and more technical knowledge, responsibility and initiative to solve problems or unexpected situations, versatility and proactivity, among others, will be required from workers in both the primary and industrial sectors.

The training of senior and middle management is provided by public and private universities. On the contrary, for lower/operational levels, there is no stable training offer or it is not adapted to the new needs of future demand with greater technological requirements. For positions considered to be low-skilled, the intergenerational family transmission of knowledge and skills predominates, a mechanism that is in danger for multiple reasons, including the migration of young generations from the countryside to the city and the lack of stable training offered in rural areas that caters for new

residents and their children.

Wine tourism

Wine tourism is expanding in most of the world's major wine regions; this growth is related to culinary art, ecotourism and rural tourism. Tourists are no longer contemplative and they expect to be an active part of the experience valuing the environment, healthy habits and direct contact with local cultures. They place great importance on the offer of high-quality complementary services and seek unique and unrepeatable experiences. In this sense, wine tourism constitutes an experience that can be conceptualized on different geographic scales and which includes visitors' perceptions of landscapes and the environment, as well as human interactions.

Wine tourism is integrative and builds a product that is much more complex than just wine, including many other sectors and resources of the territory which are of interest. The greatest challenge wine tourism faces is to adapt quickly and agilely to the sudden changes of a globalized society. An example of this is the COVID-19 pandemic, which will change the concept of wine tourism, since some classic activities in this sector will have to be modified and the use of new technologies will have to be implemented

Research, development and innovation

In terms of research, development and innovation, there are marked differences between regions considering the density of technological research and development institutions dedicated to issues in the sector.

On the one hand, the trend is towards greater coordination between scientific and technical organizations and institutions, governments and the private sector. This will allow defining and allocating funds to projects that respond more closely to the demands of the wine sector.

On the other hand, new ICT has changed the ways of accessing knowledge, as well as the articulation between the actors in the wine sector. The construction of models and the estimation of the prediction of both demand and supply, and other indicators, is strategic knowledge for planning and decision-making. Mechanization, automation, robotics, Internet and AI technologies are a trend that cuts across the different stages of the value chain. The appropriation of these technologies is growing, hand in hand with the emergence of service companies, which are new actors in the productive framework.

Organization of the wine sector: The actors

The national wine industry is characterized by the existence of a significant number of organizations representing the different sectors of the production chain. They are linked to each other, to science and technology organizations, to the National Government and to provincial and local governments. In this way, a complex network is created, on whose interrelations the sector's coordination capacities and the relations of cooperation and conflict depend. All of them can be taken into account in a new strategic planning.

The National Government, mainly through the Ministry of Agriculture, Livestock and Fisheries, designs policies for the agro-industry and calls upon its stakeholders to agree on them. Within this ministry, the National Institute of Viticulture (INV) is the one that has specific influence , but others also contribute such as the National Institute of Agricultural Technology (INTA), the National Service for Agro-Food

Quality and Health (SENASA), the Secretariat of Food, Bioeconomy and Regional Development, among others. Besides, public and private national and provincial universities are part of this framework and the governments of the provinces with the largest wine production in the country also have state agencies or entities involved in wine-related issues.

The diversity of representative organizations of producers and industrialists provides opportunities for participation, but at the same time it complicates the links within the sector, which make necessary the existence of spaces for consultation. The main actor is the Corporación Vitivinícola Argentina (COVIAR), but we can also mention the Advisory Commission of the INV, the board of directors of the Mendoza Wine Fund, specific spaces convened by the provincial governments and the advisory councils of the Viticultural Development Centers. Its composition is diverse, with the participation of organizations from the private sector, professional councils, as well as scientific and technical

SWOT analysis of the wine sector

From the analysis of all the collected, analyzed and synthesized information, throughout the different stages of the collective construction of the PEVI2020 update with a horizon to 2030, the main Opportunities, Threats, Strengths and Weaknesses of the Argentine wine sector were identified.

STRENGTHS

- *The Argentine wine sector is organized with public-private articulation, laws that regulate it and a law that supports a strategic plan.*
- *Existence of companies in the sector with important positioning in the international market.*
- *Argentina is a world recognized wine-producing player.*
- *Diversity of producing regions that can offer different products with identity.*
- *Diverse territories to offer quality tourism experiences.*
- *Tradition, cultural roots and knowledge related to products derived from the vine.Significant amount of variety in the vines*
- *Existence of an emblematic variety as Malbec and others with potential.*
- *Existence of public and private institutions for education, research and development of specific technology.*
- *Existence of industry producing technological goods for the sector's demand.*

WEAKNESSES

- *Growing economic concentration.*
- *Lack of transparency in the marketing of grapes to the winery.*
- *Lack of traceability from producer to bottle.*
- *Unequal distribution of the value generated in the chain.*
- *Low profitability of primary production and processing, decapitalization.*
- *Primary production model with significant demand for unskilled labor and unattractive jobs.*
- *Lack of technical development in vineyards and wineries, vineyards not adapted to technical development.*
- *Insufficient supply of agricultural and oenological services, especially for small producers.*
- *Loss of oenological quality of the grapes due to poor logistics between the farm and the winery.*
- *Regions with difficult access to technology, infrastructure and suppliers of goods and services.*
- *Lack of resources for the implementation of environmental and social sustainability protocols.*
- *Poor horizontal and vertical integration and association.Low participation of associates in their organizations.*
- *Low representation of the sector's smaller players in the consultation spaces.*
- *Low generational change, migration of young people and advanced age of producers.*
- *Gender inequality in employment opportunities.*
- *Little promotion of wine tourism in some regions.*
- *Wine's confusing message to retain consumers and attract new ones.*
- *Regions are not characterized to support product sales in the markets.*
- *Little innovation in vine derived products.*
- *Electro-dependence in irrigation areas with water of underground origin.*
- *Lack of adapted standards for the innovation of vines derived products.*
- *Little advertising and promotion for domestic consumption of raisins, juices and fresh grapes.*
- *Little innovation in packaging for vine derived products .*
- *Poor irrigation technology. Inefficient use of irrigation water.*

OPPORTUNITIES

- Growing consumption in some importing countries (Asia, Russia, Mexico).
- Increase in bulk quality wine market.
- Demand for organic concentrated juices.
- Potential synergy with other Argentinian export sectors.
- Consumption gap in the domestic market to grow in raisin grapes.
- In the domestic market, wine is identified as the national drink.
- New communication channels and marketing technologies.
- Growth of national and international wine tourism.
- Diverse and attractive territories to offer tourism experiences.
- Excellent agro ecological conditions.
- Existence of suitable sites to be explored for the development of new producing regions.
- Existence of institutions for education, research and development of technology capacities.

THREATS

- Competing countries with convenient trade agreements and support from their states.
- Uncertainty in macroeconomics.
- Non-tariff barriers.
- Apple juice competition.
- Falling consumption, less frequency and competition with other drinks.
- Lack of identification of young people with wine.
- Lack of public policies and coordination between public parties related to the sector.
- Lack of access to financing and high tax pressure.
- Poor infrastructure and public services.
- Urban encroachment on rural lands.
- Lack of articulation/relationship between research and sector demands.
- More extension and technology transfer needed.
- Lack of qualified labor and availability of new job profiles.
- Lack of educational offers for new profiles.
- Climate change effects.
- Shortage of water resources for irrigation, lack of modernization of distribution systems.

Plan construction

The following diagram summarizes the process of collective construction of this Plan.

Thousands of people involved in Argentinian wine making participated in different instances such as preparation of strategic documents by topic, interviews, regional workshops and sector meetings.

The definition of a diagnosis of the current reality and the prospects of the sector allowed us to think about the vision, mission and values of national viticulture towards 2030. Based on these, economic,

social and environmental sustainability was identified as the main basis for the definition of six objectives and four transversal strategies to achieve them.

From the intersection of objectives and strategies, some tactical actions have been designed to be developed in the coming years and which must be prioritized and reviewed for future plans.

Vision

The Vision has been built on the basis of the opinions and information collected during the process of building the Plan for a year and a half, in person and virtually, trying to reflect the opinions of the different actors that are part of the Argentinian wine sector. The focus of the Vision is sustainability, considering its economic, environmental and social aspects. In the economic aspect, it emphasizes markets, both internal and external, consumers, and the diversity of territories, actors and products as distinctive elements. In terms of society, it proposes equity, inclusion and equal opportunities for all actors. In terms of the environment, it proposes respect for the environment in all productive and commercial activities.

"Argentine wine making will be a sustainable and diverse activity, which will enable the development of its atakeholders, respond to consumer dynamics and create new opportunities for the market and for the communities where it operates."

Mision

To achieve its Vision, the sector sets out its Mission, which will require the commitment of all its public and private stakeholders at different stages and in all territori es where it operates.

"Argentine winemaking offers competitive products, appreciated for their consistent quality, recognized for the value generated at source, territorial and cultural diversity and its broad socio-productive network."

Values

Values introduce the axiological dimension, that is, the principles that the sector wants to serve as a guide for the development of its activities and for the realization of its mission and vision.

Strategic aims

Fulfilling its mission, working together and respecting the values set forth, the sector proposes six strategic aims and four transversal strategies to achieve its vision. In addition, some goals and indicators are proposed for each objective which will allow monitoring and evaluation of results.

Market aims

In order to establish goals and indicators, regional workshops were held . From the opinions of experts, the information arising from sector meetings and the analysis of strategic plans from other wine-producing countries and regions around the world, the goals were achieved. These goals will allow frequent monitoring and evaluation during the execution of the plan and, if necessary, the actions being carried out could be corrected and modified.

The goals were established for the year 2030, considering the following markets:

It is worth noting that the goals were determined by evaluating the main restrictions that may arise when expanding markets and which come from considering both the threats of the context and the internal weaknesses of the industry. Likewise, and in the same logic, the opportunities and strengths that have been observed in each of the markets were taken into consideration.

This analysis requires that growth is established based on future strategies that will allow taking advantage of these opportunities and strengths and therefore contribute to achieving the expected results.

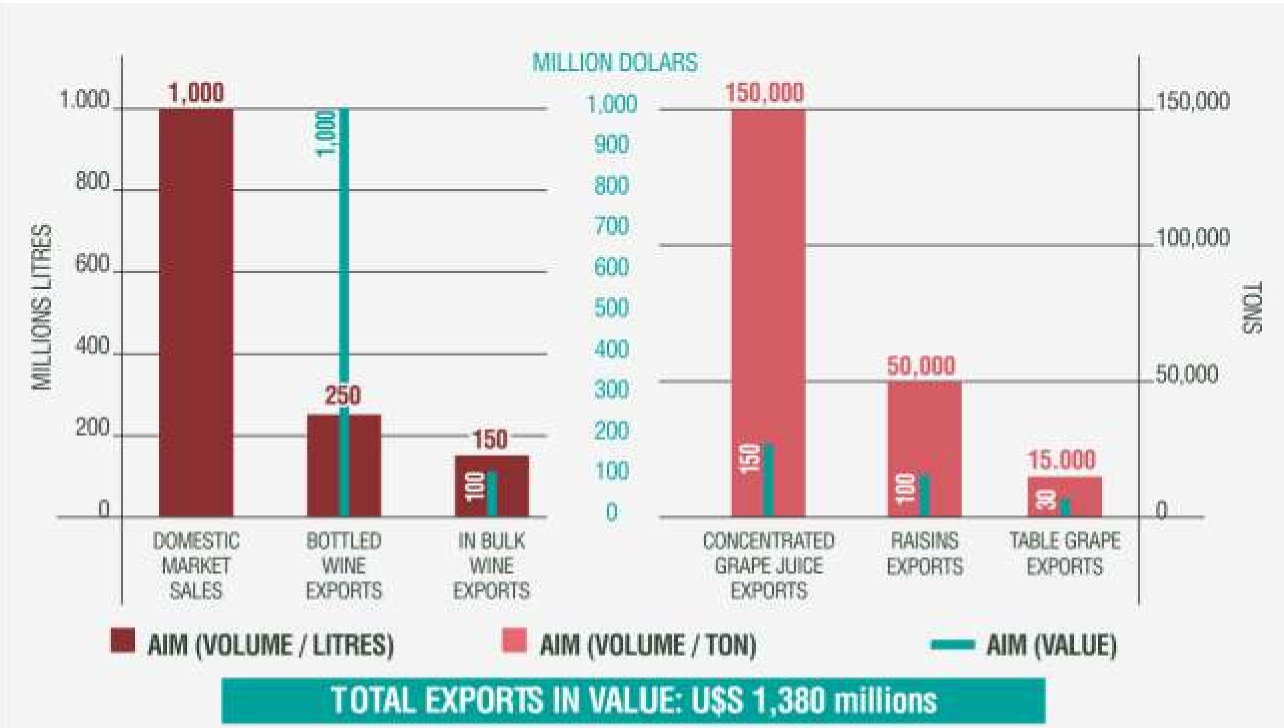
However, these strategies must be understood as necessary, but not sufficient, conditions, because the competitive environment and the country's competitiveness must accompany these strategic processes.

In this regard, the projections made are based on empirical evidence from past periods and on assumptions regarding what may occur with these macroeconomic variables in the future. If these assumptions are not verified during the execution of the Strategic Plan, the established goals must be reviewed, considering not only these, but also any other significant emerging event that substantially affects market conditions.

The following assumptions have been considered

- Stable and in terms of 2019 levels real exchange type of currency devaluation rate varies in the same magnitude as the inflation rate
- Support service conditions, logistics and infrastructure without significant change towards the future.
- Main competitors behavior in different markets, similar to what was observed in the last five years.
- Stable and similar substitute products behavior according to what was observed in the last five years.
- Demand tendencies in the main markets without significant change compared to what was observed in the lat five years.
- Global (world) demand tendencies according to what was observed in the last five years.
- No significant emergents taken under consideration.

The proposed goals established for value and volume are the following:



MARKET	AIM(VOLUME)	AIM(VALUE)
1- DOMESTIC MARKET	1,000 million liters	
2- BOTTLED WINE EXPORTS	250 million liters	U$S1000 million
3- IN BULK WINE EXPORTS	150 million liters	U$S 100 million
4-C.G.J. EXPORTS	150,000 tons	U$S 150 million
5-RAISINS EXPORTS	50,000 tons	U$S 100 million
6-TABLE WINE EXPORTS	15,000 tons	U$S 30 million
	TOTAL EXPORTS	U$S 1,380 MILLION

Strategies

The following strategies have been proposed to achieve the objectives. They are based on the information collected, the analysis of strengths, weaknesses, opportunities and threats, sector consultations, the context and future trends.

OBJETIVES

TECHNOLOGICAL AND ORGANIZATIONAL INNOVATION

It includes research, development and innovation actions, understanding innovation as a socio-technical process of continuous change in the forms of production, marketing and organization, with respect and care for the environment and contributing to a dignified life.

INSTITUTIONALITY AND ARTICULATION

It includes actions to generate spaces for participation and agreement in the institutional framework and strengthening sectoral organizations.
It also includes actions to achieve greater public-private and intersectoral national and international coordination to favor the competitiveness and sustainability of the sector.

ASSOCIATION AND INTEGRATION

It includes actions to promote horizontal and vertical integration and association processes that improve negotiating power, representation, participation in consultation spaces and that facilitate innovation processes.

PROMOTION AND COMMUNICATION

It includes actions to promote and communicate the identity and origin of the products, diversity and characteristics of the regions, wine tourism experiences and social and environmental sustainability of primary and industrial production. It also includes communication actions on the execution of the plan and the generation of strategic information for the actors in the sector.

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Strategic Actions

Strategic Actions are proposed to achieve the objectives and reach the Vision and Mission.

STRATEGIC ACTIONS / Economic sustainability Goal

Foreing market

To increase the volume and value of exports and destination markets for bottled wine, bulk wine, concentrated grape juice, table grapes, raisins and other grapevine products.

STRATEGIES

STRATEGIC ACTIONS

TECHNOLOGICAL AND ORGANIZATIONAL	INSTITUTIONALITY AND ARTICULATION	ASSOCIATION AND INTEGRATION	PROMOTION AND COMMUNICATION	INDICATORS
To promote the use of new communication channels, social networks, KOLs, influencers and specialized.	To encourage the generation of specific measures and coordination with the Ministry of Foreign Affairs to promote the export of grape derived products	To promote agreements between small and medium-sized industries that export or wish to export, to improve competitiveness and facilitate the arrival of products to destination	To establish the country brand "Argentina, Land of Grapes and Wine".	% share in international markets for different products. Exports volume.
Monitor consumption trends of grape-derived products in the markets.	Manage and obtain public funds for the generic promotion of grape derived products .	To promote integration through long-term agreements between the links in the chain from consumer to primary production, allowing them to align themselves with the same commercial objective	To communicate the diversity of wine regions and products, nature, sustainability, transparency and traceability.	Value of exports. Social media indicators (WOFA), internet visits.
Implement new big data tools for transparency and traceability (Block Chain).	To coordinate actions with other Argentinian export sectors.		To facilitate the participation of companies from the national territory in fairs, events and international business rounds .	Public and private funds obtained for the development of Loss reduction
To promote the use of new forms of marketing of wine derived products	To encourage incentive policies for the use of private funds to promote grapevine products. To promote and strengthen commercial links between companies, institutions and/or organizations from other countries to facilitate the sales of Argentinian grape derived products in foreign markets.		To communicate the unique characteristics of the products produced in the different wine regions of the country, considering the area, the plant material and the microorganisms used in production	Quality indicators. Commercial agreements achieved.

STRATEGIC ACTIONS / Economic sustainability objective

Domestic Market

To increase domestic consumption of wine, grape juice, must, table grapes, raisins and other grapevine products.

STRATEGIES

STRATEGIC ACTIONS

TECHNOLOGICAL AND ORGANIZATIONAL	INSTITUTIONALITY AND ARTICULATION	ASSOCIATION ANDINTEGRATION	PROMOTION AND COMMUNICATION	INDICATORS
To promote the use of new communication channels, social networks, KOLs, influencers and specialized media.	To coordinate with the national, provincial and municipal governments the presence of grape derivedt products in the most important festivals and fairs in the country.	To promote integration through long-term agreements between the links in the chain from consumer to primary production, allowing them to align themselves with the same commercial objective	To focus promotion and communication actions according to socio-economic segments, age group, gender and region of origin.	National wine consumption Wine expenses.
Implement new big data tools for transparency andtraceability (Block Chain)	To promote the revision ofcurrent regulations that may limit the increase in domestic consumption..	To design agreements between small and medium-sized companies that want to trade vine derived products in the domestic market.	To communicate the diversity of wine regions and products, nature, sustainability, transparency and traceability.	Table grapes national consumption. Sending raisins to the domestic market
To promote the development of new wine derived products.	To evaluate and promote countercyclical alternatives to maintain a market balance that contributes to the sustainability of all actors.		To facilitate the participation of companies from the national territory in fairs, events and international business rounds.	
To promote packaging innovation for different wine derived products.	To encourage agreements with other production sectors that favor consumption of vine derived products.		Promote communication actions based on simple and attractive messages for target audiences in order to increase the frequency and regularity of consumption of grape-derived products and attract new consumers.	
To promote packaging innovation for different wine derived products	To encourage incentive policies for the use of private funds to promote grapevine products.		To communicate the unique characteristics of the products produced in the different wine regions of the country, considering the area, the plant material and the microorganisms used in production	
To promote market research to identify new trends and tastes and understand the profile of consumers.	To promote and strengthen interprovincial commercial links between companies, provincial and/or municipal organizations in order to facilitate sales of vine derived products in the domestic market.			
To promote technological surveillance regarding new ways of marketing wine products.	To promote in smaller wine growing regions the development of local markets linked to tourism for regional vine derived products			

STRATEGIC ACTIONS/ Economic sustainability aim

Profitability, Productivity and Quality

To improve the distribution of the value generated in the wine sector, the productivity and efficiency of primary and industrial production and the quality of products derived from the vine

STRATEGIES

STRATEGIC ACTIONS	TECHNOLOGICAL AND ORGANIZATIONAL INNOVATION	INSTITUTIONALITY AND ARTICULATION	ASSOCIATION AND INTEGRATION	PROMOTION AND COMMUNICATION	INDICATORS
	To promote the improvement in the efficiency of the integrated use of water within the farm.	Coordinate with provincial, national and international science and technology organizations to strengthen R&D activitiesI.	Promote peer partnerships to share knowledge that contributes to improve productivity.	Communication events on scientific and technological advances related to productivity and quality	Profits /ha (isolating meteorological effects) Profits/m3 water Profits/KWh Profits/ day Production costs Energy efficiency Increase in % of exportable wines (bulk and bottled). % of defects in domestic market wines (Sommeliers) Number of producers who adopt assisted harvesting. Production of mechanically harvested grapes. Number of producers incorporating new irrigation systems New goods and/or technological inputs forproduction. Number of service providers Distribution of the business surplus generated by the sale of a unit of final product in the links of the production chain.
	To promote innovations related to 4.0 Technologies and others that are developed	Promote the revision of current regulations that may limit improvements in productivity in the primary and industrial sectors.	Promote vertical integration through long-term agreements that contribute to the improvement of the productivity of the sector and the quality of products.	To implement technological surveillance actions for the sector	
	To promote innovations that allow for the objective qualification of raw materials and intermediate products.	To manage to receive public funds to contribute to the competitive improvement of the sector.	To apply or design agreements between small and medium-sized companies to increase their scale and facilitate innovation-s.	To communicate the unique characteristics of the products generated in the different wine regions of the country, considering area, plant material and the microorganisms used in the production.	
	To innovate to reduce the effects of climate risks: frost, hail, zonda wind, heat waves, drought.	To coordinate with financial organizations in order to create finance lines adapted to the structure and dynamics of the sector.	To create new organizational forms that promote efficiency in the use of resources, improve productivity and/or quality of wine products		
	To facilitate innovations that contribute to improvement of the quality of vine derived products	To articulate with different sectors to promote the national production of necessary goods and services necessary			
	To promote the development of goods and services suppliers that facilitate innovation in the production and industrial phase.	To promote strategic alliances with public and private participation for technological innovation, management, access to marketing and logistics between producers, industrialists, suppliers of goods, service providers, scientific and technical organizations and governments			

Continua el cuadro en la siguiente página >>>

STRATEGIC ACTIONS/ Economic sustainability aim

	STRATEGIES				
	TECHNOLOGICAL AND ORGANIZATIONAL INNOVATION	INSTITUTIONALITY AND ARTICULATION	ASSOCIATION AND INTEGRATION	PROMOTION AND COMMUNICATION	INDICATORS
STRATEGIC ACTIONS	To identify and contribute to the solution of logistics critical points with the greatest impact on costs and quality in order to facilitate the arrival of grapevine derived products to different parts of the country.	To manage the get information for monitoring sectoral productivity as well as variables that allow monitoring the quality of products over time.			
	To promote the development and use of certified plants				
	To promote the use of minority heritage vine varieties to obtain vine-derived products with a unique identity.				
	Promote the use of native microorganisms in the grape industrialization stage.				
	To promote the development of new varieties for raisins, early, seedless, with high sugar yields and low incidence of diseases				
	To communicate the unique characteristics of the products produced in the different wine-growing regions of the country, considering area, plant material, and the microorganisms used in the production.				
	To promote the use of high productivity and efficiency systems such as plant drying (DOV), box pruning, etc.				
	Promote the organization of new actors in the sector, such as service providers and business segments				

STRATEGIC ACTIONS/ Economic sustainability aim

Wine tourism

To develop wine tourism in all Argentinian wine-growing regions, impacting their economies by highlighting their historical, scenic and cultural heritage

STRATEGIES

STRATEGIC ACTIONS

TECHNOLOGICAL AND ORGANIZATIONAL INNOVATION	INSTITUTIONALITY AND ARTICULATION	ASSOCIATION AND INTEGRATION	PROMOTION AND COMMUNICATION	INDICATORS
To promote the development of new wine tourism projects	To strengthen the institutionality of the activity at national and international levels.	To provide employment opportunities linked to tourism for young people, in order to encourage local roots	To develop a quick search access that allows obtaining information on the wine tourism cluster, taking into account the territorial and experience diversity.	Arrivals of national wine tourists. Arrivals of international wine tourists generated by national wine tourism. Income generated by international wine tourism Number of winery visits Number of farm visits. Number of visits to other establishments (packing sheds, etc.) Number of visits to wine routes Number of visits by gender. Number of visits according to age. Number of wineries open to tourism. Number of farms and ranches open to tourism. Income from sales made in wineries. Income from sales made on farms Local/foreign investments. Number of services offered by the wineries (tasting, gastronomy, spa, sports, cultural, among others) Direct jobs generated by the wine tourism sector Indirect jobs generated by the wine tourism sector
To create a wine cluster observatory by region.	To develop territorial management platforms	To promote integrated circuits between provinces as well as between neighboring countries	To strengthen existing local markets and develop new and potential ones	
To diversify the offered services by promoting identity and authenticity of the experiences provided.	To promote tourism quality certifications that standardize the services offered.	To complement wine tourism with other regional products and services.	To participate in wine fairs and tourism promotion (including wine tourism experiences)	
Staging extraordinary experiences in the winery.	To coordinate with training and education institutions to express the demands for necessary job profiles to guarantee the quality of service to tourists.	To associate and integrate actors from primary and industrial production into wine tourism activities.	To develop a generic wine tourism marketing plan.	
To develop innovative, participatory, personalized, quality and safe experiences around the vine culture .	To coordinate with training and education institutions for the projection and planning of new wine tourism ventures and developments.	To promote the development of thematic inter-regional corridors linked to wine tourism.	To position the different wine regions in the national, provincial and departmental tourist offer	
To promote accessible, smart and sustainable destinations.	To promote training for small and medium-sized producers and processors to develop wine tourism.		To promote wine tourism on cruise ships, hotels and airlines.	
To develop interactive wine tourism experiences.	To coordinate with tourism sectors in other countries to offer better and more comprehensive services and experiences.		To promote the digital promotion (WEB, social networks) of the different wine tourism experiences.	
	To coordinate with local governments to promote infrastructure development and boost wine tourism in their territories.			
	To coordinate actions between the public-public, public-private and private-private sectors, as well as between different actors involved in the wine tourism sector.			

STRATEGIC ACTIONS/Social sustainability aim

Social

Promote social sustainability in viticulture with the inclusion of all stakeholders, through innovation, integration and education processes, strengthening the social capital of the territories..

STRATEGIES

STRATEGIC ACTIONS	TECHNOLOGICAL AND ORGANIZATIONAL INNOVATION	INSTITUTIONALITY AND ARTICULATION	ASSOCIATION AND INTEGRATION	PROMOTION AND COMMUNICATION	INDICATORS
	To promote the development and incorporation of technological innovations that respond to the needs and possibilities of small and medium-sized producers and industrialists.	To strengthen representative organizations of stakeholders and create spaces for participation and consultation.	To promote cooperatives and other legal forms of association	To promote and communicate the Responsible Consumption of wines and the health benefits of vine derived products	Number of active members in the entities. Number of wineries/primary producers Number of long-term contracts between producers and industry Number of primary producers accessing financing lines Cooperatives: number of members/ number of third parties / number of cooperatives Number of women participating in management positions in organizations and companies. Average age of winery managers and owners. Average age of primary producers. Number of direct and indirect jobs generated by the wine industry. Acquired skills that are incorporated into the labor and technical demands of the entire wine sector. Number of courses and study programs adapted to the demands of the sector.
	To facilitate the implementation of management tools for wine-growing organizations and companies.	To collaborate with local governments in actions to improve the habitat and infrastructure of rural wine-growing areas.	To encourage formalization of long-term agreements between producers and processors with profitability and equity.rage	To favor communication between wine-growing organizations, with those from other productive sectors, with science and technology organizations, with civil society organizations and with governments.avor	
	To strengthen the wine sector by promoting the development of suppliers of inputs,services and technology-based companies.	To provide tools and create the conditions for the incorporation of young people and women into winemaking activities.	To strengthen joint actions of small producers and processors for investment and access to financing	To develop communication actions on the implementation of the Strategic Plan and other information of interest to the sector.	
		To promote the incorporation of young people into managerial tasks to facilitate generational succession in organizations and companies.		To value and incorporate the socio-territorial identity of origin in all products of the wine chain .	
		To articulate with educational , scientific and technical institutions to strengthen the offer of training and formation		To promote and communicate Social Responsibility actions in the territories where winemaking activity takes place	
		To improve working conditions on farms and wineries.		To promote and communicate responsible wine consumption and the health benefits of products derived from vines.	
		To improve working conditions on farms and wineries.		To promote and communicate responsible wine consumption and the health benefits of products derived from vines.	

STRATEGIC ACTIONS/ Environmental sustainability aim

Environment

Promote the optimization of resource use through sustainable models in primary production, industrial production and consumption, taking into account the complete life cycle of products derived from the vine.

STRATEGIES

	TECHNOLOGICAL AND ORGANIZATIONAL INNOVATION	INSTITUTIONALITY AND ARTICULATION	ASSOCIATION AND INTEGRATION	PROMOTION AND COMMUNICATION	INDICATORS
STRATEGIC ACTIONS	To increase efficiency in the use of water resources, to use alternative energy sources in order to reduce the environmental footprint of products derived from the vine and their production and commercial processes.	To strengthen alliances with national and international organizations for the design and generation of financing instruments for projects that minimize the environmental impact of agricultural/industrial/commercial activities.	To promote associative mechanisms to facilitate and reduce the costs of implementation and certification of environmental and social sustainability protocols	To inform and communicate Argentina's clean production image.	Number of wineries that recycle the water used in the processes. Number of funded projects. Amount of water used per production unit. Surveys revealing the awareness of actors Number of producers implementing BPA (GLOBALGAP). Number of wineries that implement food safety assurance systems. Number of vineyards and wineries that measure carbon, water and environmental footprints. Number of producers and wineries with implemented protocols Number of quality protocols depending on the destination of raw material. Number of wineries that incorporate technologies for effluent treatment. Number of wineries applying more energy-efficient technologies. Implementation of communication campaigns
	To innovate in technology that promotes the use of safe phytosanitary products for the consumer and the operator, while respecting biodiversity.	To manage incentives (economic/tax) for sector actors that implement environmental and social sustainability protocols.	To establish a public-private inter-institutional space that promotes joint actions for environmental sustainability.	To communicate consumers about the environmental and social sustainability protocols implemented and certified by the sector.	
	To prevent air, water and soil pollution by reducing, reusing and recycling waste generated by primary, industrial and commercial production to minimize the impact on the ecosystem (circular economy).	To ensure the sustainability of groundwater extraction and surface water supply to address scarcity.	To implement associative strategies to facilitate the application of technologies and actions for efficient use and sustainable management throughout the entire chain.	To raise consumer awareness about the environmental footprint of viticulture and its products (by developing communication programs)	
		To promote improved management and integrated use of water with a focus on the water-energy-food nexus.	To encourage the creation of innovative organizational schemes between farms and wineries that reach agreements on compliance with sustainability protocols.	To support the positioning of Argentine winemaking in segments and markets that value environmental care, in a sequential manner and based on the implementation of environmental standards	
		To promote the implementation of environmental/social/quality sustainability protocols			
		To facilitate access to new technologies that contribute to optimizing the use of water, energy and chemical synthesis products and that promote the use of clean energy.			

Implementation and monitoring

The Plan is an open agenda, a text that has a first version in 2020, but on which the actors will continue working. Therefore, permanent monitoring, triennial review and a final impact assessment are proposed.

In the first year, after the pandemic, the plan was presented in the different wine regions of the country, to reach a consensus, improve it and, as a consequence, prioritize actions to achieve the proposed objectives and define goals taking into account the characteristics of each region. In addition, the baselines of the key performance indicators to be monitored permanently will be identified and a work of prioritization of the proposed strategic actions will be carried out.

Every year evaluation sessions of specific objectives will be held with a broad presence of the actors in the sector. Every three years, a review of the content of the plan will be carried out with the possibility of making changes or adaptations, for example, in objectives, strategies and strategic actions.

In the last year of the Plan's implementation, an impact assessment will be carried out, which will serve as the main input for new strategic planning.

Permanent monitoring tools will be used for the management and coordination of the Plan.

ACTORS OF THE SECTOR

Representative organizations

Argentine Association of Sommeliers
Association of Salta Wineries
Association of Wine Cooperatives (ACOVI)
Association of Homemade Wine Producers (ACEVAC)
Association of Homemade Wine Producers of Maipú
Association of Producers of Eastern Mendoza (APROEM)
Association of Producers in Action (APA) of Mendoza
Association of Wine Producers of the Calchaquí Valleys (APROVIVAC)
Association of Winegrowers of Mendoza Association of Independent Winegrowers of San Juan
Association of Winegrowers of Entre Ríos (AVER)
Association of Winegrowers of the Cold Zones of Río Negro Argentine
Wineries of Argentine
Chamber of Manufacturers and Exporters of Musts
Chamber of Exporting Wineries of Patagonia
Chamber of Wineries and Vineyards of Tucumán
Chamber of Winemakers of La Rioja
Chamber of Winemakers of San Juan
Chamber of Bulk Wine Exporters
Chamber of Raisins and others San Juan
Chamber of Wine Producers (CAPROVIT) of San Juan
Rioja Chamber of Agricultural Producers (CARPA)
San Juan Chamber of Winemaking
Center of Wine Growers and Winemakers of Eastern Mendoza
Argentine Wine Corporation
Federation of Argentine Viticultural Chambers

Federation of Winegrowers and Agricultural Producers of San Juan
Mendoza Vitivinicultural Fund
National Institute of Agricultural Technology
National Institute of Vitiviniculture
Producers of fresh grapes and raisins of San Juan
Argentine Vitivinicultural Union (UVA)
Wines of Argentina

Workers

Federation of Wine and Related Workers and Employees (FOEVA)
Union of Fresh Fruit and Vegetable Packing Workers of Cuyo (SEFFHC)
Union of Food Industry Workers (STIA)
Argentine Union of Rural Workers and Stevedores (UATRE)

Professionals

Professional association of oenologists
Professional association of engineers
Other professional entities.

Other organizations linked to the sector

Argentine Association of Regional Consortia for Agricultural Experimentation (AACREA)
Agroindustrial Chamber of La Rioja (CAILAR)
Chamber of Agriculture, Industry, Commerce and Livestock of the Tupungato Valley
Chamber of Foreign Trade of San Juan (CACEX)
Chamber of Commerce, Industry and Agriculture of San Rafael
Chamber of Commerce, Industry and Agriculture of Tunuyán
Chamber of Commerce, Industry, Agriculture and Livestock of General Alvear
Chamber of Exporters, Importers, Packers and Distributors of Fruits and Vegetables of San Juan
Chamber of Production, Packaging and Fruit and Vegetable Trade (CPEC) of San Juan
Business Chamber of Rivadavia Agricultural schools of wine-growing areas State and private universities