

ANNUAL REPORT 2022



CÔTES DE PROVENCE COTEAUX D'AIX-EN-PROVENCE COTEAUX VAROIS EN 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,

ver the past few years, our wine region has been profoundly transformed, including a significant upgrade to our products. And all this will continue in today's perpetually changing world. It is essential for our companies and collectives to evolve and adapt so they can meet the challenges to come.

The CIVP is evolving too, to provide support for these changes.

As a result, 2022 was a year of transition and preparation for the rollout of our strategic plan.

A new organization and a new org chart have been established at the CIVP, to strengthen our "Vins de Provence" collective brand strategy.

Building on this new organization, we were able to launch multiple projects linked to the five strategic priorities defined for our wine region.

As part of the EnViProv project (conducted in partnership with the Syndicat des Vins Côtes de Provence, the Var Chamber of Agriculture, the Centre du Rosé and the IFV (French Wine and Vine Institute), we carried out a life cycle analysis of the wine region, which allowed us to measure the environmental impact of our different practices and explore possible corrective actions.

We worked with the Syndicat des Vins Côtes de Provence to organize a day of brainstorming that helped us develop a technical strategy for the Provence wine region over the next few years. The resulting actions will focus on water, carbon, soils and biodiversity.

To promote the reputation of Vins de Provence wine on a more political level, we spoke at the OIV World Congress of Vine and Wine in Mexico, we run a European programme on rosé PDOs with Italy's Valtènesi wine region, and we set up an exclusive presentation of our wines during Bastille Day festivities at our embassies (Rome in 2022 and Washington, DC, in 2023).

Destinations Vignobles was held in Aix-en-Provence last year. That trade fair, which hosts more than 150 specialized tour operators from around the world, was organized in collaboration with local and regional tourism partners and gave us an opportunity to showcase the abundance, diversity and lifestyle of the Provence wine region.

The CIVP's marketing team prepared the new communication campaign which each of you has had the chance to discover in 2023. It outlines our brand's key messages, which are aimed as a priority at hedonistic millennials.

As you read through this report, you will learn about all the actions undertaken by the CIVP in 2022.

Our French wine industry is going through a difficult period marked by dramatic changes that are generating uncertainty and doubt.

We are keeping a close eye on how the Vins de Provence wine region is evolving. The economic and social climate is complicated. Structural shifts in our industry are shaking up our habits.

We will need to offer guidance on these changes so that all our members can find their place and grow their business.

It is important for each of us – wine-makers and merchants alike – to be aware of the challenges ahead in order for us to be able to adapt and confidently plan for the future, as we have always done in Provence.

Our wonderful Provençal wine region possesses many advantages that will help us going forward, including the real expertise of our actors. Personally, I know this to be true.

I would like to thank the members of the CIVP's Board of Directors and staff for their steadfast commitment to Vins de Provence and our wines.

ORGANIZATION OF THE CIVP

he 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. Its members are wine-makers and wine merchants who work with the Côtes de Provence, Coteaux d'Aixen-Provence and Coteaux Varois en Provence PDOs. The CIVP has made it possible to:

- Reinforce the strength of the wine industry in France
- · Increase its members means of action and financial resources
- · Promote the special features of each appellation.

Decisions

All the CIVP's decisions are made by professional representatives, always with an equal representation of wine-makers and merchants.

Missions

The CIVP's missions are approved by the industry's professional representatives, reviewed by the public authorities and implemented by a team of 17 people.

They are built on four pillars:

- ECONOMY: knowledge of supply and demand and market regulations
- TECHNIQUES: research and experimentation, thanks in particular to a partnership with the Centre du Rosé
- QUALITY: quality monitoring to check and improve the quality of wine when before it hits the market
- COMMUNICATION: collective communication about and promotion of wines from the three PDOs, in France and abroad.

COMPOSITION OF THE CIVP EXECUTIVE BOARD



Eric Pastorino

Philippe Brel



Olivier Nasles

Philippe Laillet



Eric Lambert



Aurélie Bertin





Salvatore Patti



Paul Bernard

GOVERNANCE

GA = 50 delegates

- Defines the CIVP's policies and general objectives
- Votes on the CIVP's by-laws, internal rules and regulations. inter-professional agreements and dues
- Approves the CIVP's financial statements and votes on its budget
- Elects the Chair of the CIVP and the Members of the BoD and Executive Board

Monitoring of CIVP operations and missions

BOARD OF DIRECTORS:

24 volunteer members

→ Prepares and ensures the application of the approved strategy

EXECUTIVE BOARD:

8 volunteer members

→ Executes the defined missions and programmes





ORGANIZATIONAL CHART

CONSEIL INTERPROFESSIONNEL

Leadership & Administration



Brice Eymard Managing Director



Nicolas Watterlot Administrative & Financial Director



Corinne Fisseux Management & Accounts Manager



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 Projec Manager

MEDIA & WINE EDUCATION



Romain Schalapa Media Relations & Wine Education Project Manager

DIGITAL



Cédric Skrzypczak Digital Expert & Project Manager

FVFNTS



Valérie Guillorit Events & Promo Items Project Manager



Manon PenotInternational Fairs
Project Manager

Economic Analysis Department

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



Amato
Economic
Analysis
Department
Manager



Caroline Grosso Margaria DeclarVins Expert & EA Assistant



Corinne Meissonnier EA & Management Assistant



Laetitia PaganelliResearch 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



Cécile GarciaTechnical Coordinator
& Project Manager

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:



Centre du Rosé



Rosé Wines World Tracking



European PDO Rosé Wines Programme with Italy's Valtènesi PDO



Rosé Chair with Kedge Business School



International Rosé Symposium

2. DEVELOP A PREMIUM, COLLECTIVE BRAND STRATEGY

- Prioritize investments in higherpotential 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
- experience to boost the Vins de Provence image

4. COMPLETE OUR ECOLOGICAL TRANSITION

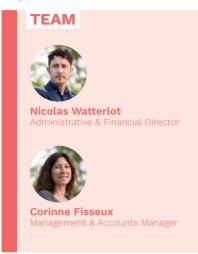
- Provide structure for and drive the wine region's ecological transition thanks to the EnViProv project
- Define a strategic technical plan for the wine region in collaboration and coordination with technical organizations
- Participate in the construction of the "new" Centre du Rosé, a cutting-edge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

Administrative & Financial 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.

Funding

- The CIVP is funded by interprofessional 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.

Financial partners:









CIVP budget for 2022

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 actions for the three PDOs: 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.

After two years hit hard by COVID-19 (2020 and 2021), 2022 marked a return to a "full" year in terms of our budget and our actions. The

rise in revenue can be explained by an increase in releases to market and the associated dues, as well as improved access to grants, thanks to better EU CMO co-financing for non-EU markets and to an EU "1144" funding programme for the rosé PDO project with the Italian Valtènesi PDO. Expenses also increased as a result of preparations to roll out the strategic plan described later in this report.

The CIVP's overall balance was positive, at €158,603, all of which is being carried over to 2023.

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 interprofessional 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 to all the members of the concerned value chain, who have an obligation to satisfy them.

The ministerial decree of recognition makes these dues compulsory.

DUES CALCULATION FOR 2022

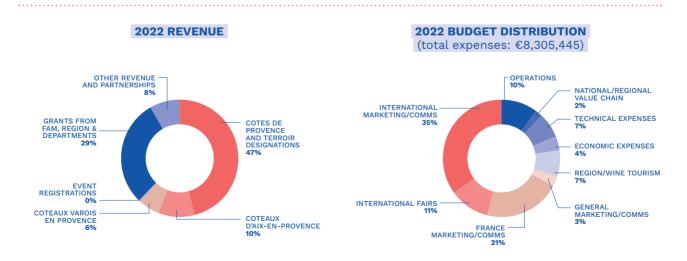
The releases to market in 2022 that generated voluntary compulsory dues were as follows:

| | 2022 | | | 2021 | |
|--|------------|--------------|------------|------------|--|
| | Value | Volume | Dues rates | Value | |
| Côtes de Provence PDO | €3,768,099 | 876,437 hl | €4.31/hl | €3,619,358 | |
| Côtes de Provence PDO Sainte-Victoire DGC | €118,222 | 22,370 hl | €5.31/hl | €114,360 | |
| Côtes de Provence PDO Fréjus DGC | €2,718 | 631 hl | €4.31/hl | €1,722 | |
| Côtes de Provence PDO La Londe DGC | €40,973 | 5,605 hl | €7.31/hl | €27,879 | |
| Côtes de Provence PDO Pierrefeu DGC | €10,474 | 1,436 hl | €7.31/hl | €18,564 | |
| Côtes de Provence PDO Notre-Dame des Anges DGC | €12,720 | 2,951 hl | €4.31/hl | €7,625 | |
| Coteaux d'Aix-en-Provence PDO | €866,368 | 216,424 hl | €4.00/hl | €885,908 | |
| Coteaux Varois en Provence PDO | €514,216 | 126,968 hl | €4.05/hl | €509,613 | |
| TOTAL | | 1,252,822 hl | | €1,217,123 | |

VOLUME OF RELEASES TO MARKET

in 2022, by PDO / DGC





TECHNICAL DEPARTMENT

Reactivation of our technical mission in 2022

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:

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

TEAM



Cécile GarciaTechnical Coordination Project
Manager

Our Technical Committee was reactivated in early 2022, co-chaired by **Alexis Cornu** and **Joël Ghiande**.



Alexis Cornu



Joël Ghiande

The CIVP would like to celebrate Joël Ghiande for his commitment to the collective and extend our heartfelt condolences to his family.



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:

- Adaptations to climate change
- Consumer expectations, in line with societal expectations
- Guarantee of **impeccable quality** and upgraded status for our wine
- Adjustment of production volumes to consumer demand and achievement of an economic balance
- 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:

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

QUALITY MONITORING

uality 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 2022:

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

OPERATIONS

The purpose of quality monitoring is to detect major, objective defects in the Côtes de Provence, Coteaux d'Aixen-Provence and Coteaux Varois en Provence PDOs, by means of random, nationwide samples taken from food retailers, wine merchants, grocer's shops, etc., by an independent service provider. All the samples are first tasted against a chart of defects prepared by the QMC. Next, they are tested by an independent laboratory. 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

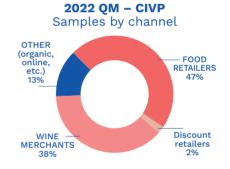
labels' signatories to inform them that their wine has been sampled. The CIVP then sends out information and/or warning letters based on the test results and the tasting marks and comments.

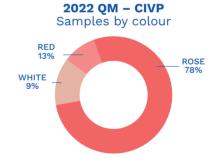
SAMPLING AND TASTINGS IN 2022

300 samples were collected in May 2022 (including 20 from 3-litre boxed rosé wine): 210 from Côtes de Provence, 55 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 1 July 2022.

PROFILES OF THE SAMPLED VINS DE PROVENCE WINES







2022 QM RESULTS:

93% of the samples taken were **compliant with the appellation specifications**, compared to **96%** in **2021**.

18 letters were sent regarding major defects, compared to 12 in 2021.





CENTRE DU ROSE SCIENTIFIC PROGRAMME FOR 2022

The CIVP funds some 20 projects ranging from vine material to wine tasting.

Vine material: Adapting to climate change and societal expectations

An agronomic, oenological study and monitoring of two categories of grape varieties:

- Climate-resilient varieties: heritage varieties and foreign varieties from around the Mediterranean (Verdejo, Xinomavro, Nero d'Avola, etc.)
- Disease-resistant varieties:
 ResDur French varieties (Artaban,
 Vidoc, Floreal, etc.) and foreign
 varieties listed in France's national
 catalogue (Souvignier Gris, Prior,
 Monarch, etc.).

O'César (an observatory tracking resistant varieties in the South of France): A regional project conducted with multiple partners (Chambers of Agriculture and appellation syndicates) to share and centralize observation data from innovative and experimental vineyard blocks.

In 2022, an app connected to a research database was developed to allow the network's wine-growers to enter their own agronomic data.

EVA (an experimental block in La Celle): Planted in 2021, around



150 innovative grape varieties (including 127 EDGARR genotypes) that are resistant to drought or disease

are grown here, all of them compliant with the characteristics of Vins de Provence wines.



Vine training methods

Adaptations 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.

Yields and quality: A study of combinations of irrigation and fertilization strategies, designed to identify the optimal physiological balance for vines to produce high-quality grapes that can make the typical Provence style of rosés.

Vinification and oenology: Support for innovations in equipment, products and processes for rosé wine-making.

Stability and hyperoxygenation: Consequences and advantages of hyperoxygenation on rosé musts, in terms of the aromatic and colour stability of finished wines, requiring less SO_a.

PigRosé: Created to master the colour of rosé over time by using more discerning tools to control the impact of fermentation and to anticipate and plan for post-fermentation changes.

Sulphite-free wine: Co-design of crop management and support techniques at a few pilot sites in order to produce rosés with no added sulphites.

Aromatic specificity of Vins de Provence wines: A doctoral thesis in partnership with the Nice Institute of Chemistry which aims to identify the aromatic compounds that are typical of Provence rosés.

Quality and typicity

- Authenticity of Provence rosés:
 An analytic, sensory and statistical study of Provence rosés compared to rosés from other regions.
- Typicity tracking: Chemical and



sensory analyses of samples from various observatories (Rosé Wines World Tracking, QM and DGCs)

conducted to describe the typicity (or typicities) of rosé wine in general and Vins de Provence rosé in particular.

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'Epargne Côte d'Azur.

The three main lines for this multidisciplinary project are:

- **1.** Research into consumer perceptions and expectations in respect of the colour of rosé wine
- Colorimetric analysis involving physical measurements and perceptions of light
- 3. Neuroenological study to identify the parts of the brain that are activated when tasting Provence





Centre du Rosé communications in 2022

- 1 Rosé & Recherche magazine
 (June 2022)
- 2 articles submitted to the OIV and presented at its World Congress in November 2022, one on the characterization of rosé wine pigments and the other on terroir rosés in Provence

Key figures

- 200 wines made at the experimental winery
- 1,600 samples collected
- 417 samples tasted during 43 sessions
- 3 judges panels (professionals, experts and consumers)
- 5 tasting methods: triangle testing, sensory profiling, polarized sensory positioning, pivot profiling and RATA





ENVIPROV, A REVIEW OF THE WINE REGION'S PRACTICES AND FNVIRONMENTAL IMPACT

nViProv is a group project cofinanced by the France Relance recovery plan and launched in 2021 with five technical partners from the industry – 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:

- 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 2030 (60% by 2024)
 - Accelerate the ecological transition
- In terms of industry dynamics:

- Give the industry structure and coordinate the actions of technical organizations
- Disseminate and transfer







CÔTES DE PROVENCE

information and support / train the wine region.

EnViProv is built on three core actions:

- Life cycle analysis of the Provence wine region, led by the CIVP
- A collective campaign to achieve HEV certification, led by the

Côtes de Provence ODG

• **Support for the wine region** in implementing ethical practices, led by all the partners.

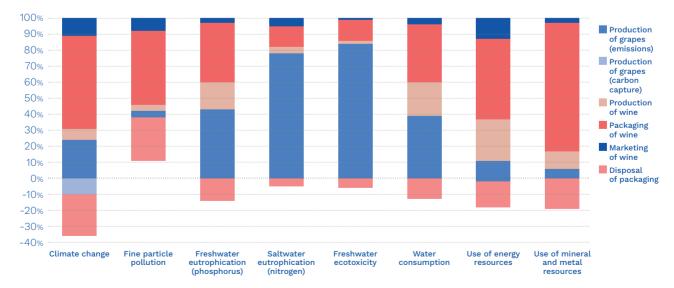
In addition, **experiments** carried out by the Provence Rosé Cluster's Living Soil Group, the Centre du Rosé and the Var Chamber of Agriculture further supplement this programme for the purpose of testing and promoting ethical vine management techniques at wineries and vineyards.

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).

LCA RESULTS, MULTIPLE INDICATORS, BY PRODUCTION STAGE

LCA results: Provence wine industry, by main production stage (FU = 1 litre of wine; EF 3.0 method)



Eight environmental impact indicators were chosen for this study, including climate change (carbon footprint), freshwater and saltwater eutrophication, and water and energy consumption levels.

The LCA measured the relative impact of each point in the life cycle, for each indicator, and provides a graphic display of that impact.

It revealed that the main steps contributing to our environment footprint are:

- **1.** The **production of dry goods**, especially glass bottles
- 2. The manufacturing and application of pest control products
- 3. Nitrogen and phosphorus emissions in the grapevines' water (66.1 % eutrophication of saltwater and 31.2% eutrophication of freshwater)
- 4. Energy consumption in the storehouse
- 5. Water consumption in the storehouse
- **6.** The handling of vine stock that has been pulled up.

In 2023, EnViProv's partners will be tasked with identifying priority points of leverage, from the vines to the market, with the goals of reducing the value chain's environmental impact

and providing guidance to vineyards in their choices for more ethical practices.

High Environmental Value (HEV): A confirmed trend



 More than 250 newly certified vineyards in the Var during the last campaign (2021-2022), thanks to a collective process



• 571 cooperative members (23 cooperative

(23 cooperative wineries and 74 individual wineries) certified in total as at 1 January 2022



of usable farmland



 A 220% increase in 2 years

For the 2022 vintage, Provence PDO vineyards with environmental certifications (organic or HEV) accounted for 55% of the wine region's total area (15,260 hectares) and 62% of its operators.

Cutting-edge experimental tanks at the Centre du Rosé: Studying energy-efficient vinification processes

The EnViProv project includes the installation of high-tech experimental tanks at the Centre du Rosé, that can be used to study the effects of different winery techniques on energy consumption levels.

Two prototypes were delivered in summer 2022 for the first testing and experimentation.

Eventually, 25 microvinification tanks will be set up at the site, providing experimentation conditions that are as close as possible to real-world conditions and that maximize the number of adjustable parameters for rosé wine-making processes, with the end goal of determining which techniques use the least energy.





NATIONAL PLAN AGAINST

VINEYARD DECLINE













ine-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 provided funding for research projects and applications, including:

- An information platform: www.plan-deperissement-vigne.fr/en
- An online self-study platform that won an OIV award: webformation. plan-deperissement-vigne.fr.

Nationwide research into vineyard decline phenomena

The following research programmes won the 2022 calls for projects:

- PGvigne.net: A study of rootstock Objective: Diversify the supply of available rootstock by adding varieties that are rarely used today, particularly in regions with calcareous soil that are subject to rising water stress
- Renov: Finding solutions for managing black wood
 Objective: Recommend strategies for containing the direct and indirect effects of this disease
- Risca 2: Collectively fighting flavescence dorée

Objectives: Contain the spread of the disease, block the transmission of the phytoplasma, pre-empt outbreaks (via rapid PCR testing) and screen more to treat less (business intelligence)

- SMIYC: A portable imaging tool for diagnosing wood diseases
 Objective: Develop a portable tool that can be used directly among the vines and that does not destroy the stock
- Vaccivine 2: A full-scale test for the prevention of fanleaf degeneration

Objective: Test the hypoaggressive strains identified by Vaccivine 1 in different wine-growing regions and on different grape varieties (Chardonnay, Pinot Noir and Mourvèdre).

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 Cécile Garcia.

Regional coordination for a better grasp on Provence's issues

A local working group focused on vineyard decline was established in 2022, made up of skilled workers, researchers and experts from ODGs, Chambers of Agriculture and the Centre du Rosé.

The first decline-related problems specific to Provence emerged from the group's discussions, making it possible to pinpoint priorities for actions and resources. A survey of the wine region will be launched in 2023 to confirm these first lines of thought and priorities.

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.



ECONOMIC ANALYSIS

DEPARTMENT

of the CIVP's core missions is to perform economic analyses of the industry and run market research. The goal is to share insight into the Vins de Provence markets and the national and international competitive environment, both internally and with the CIVP's members and partners.

Three functions are performed to meet this goal:

- · Monitoring of the wine region's economic indicators (pre-market)
- · Analysis of sales and management of market research (post-market)
- Management of Rosé Wines World Tracking (an economic observatory that is the only one of its kind) with FranceAgriMer.

Monitoring of the wine region's economic indicators (pre-market)

- The Economic Analysis Department's team conducts in-depth analyses of data from the wine region (monthly summary declarations, inter-professional contracts, etc.) in order to produce dashboards and publish them on a regular basis, both internally and for members and partners.
- Other crucial functions include checking the databases, improving their reliability and protecting data privacy.

The CIVP's Economic Analysis **Department in 2022**

- 40 participants on average in attendance at each wine region meeting*
- Roughly **150 countries** tracked
- 15 countries tracked in detail
- 40+ economic newsletters published
- Around 130 dashboards produced

TEAM



Brice Amato



Paganelli



Margaria



Caroline Grosso



Meissonnier

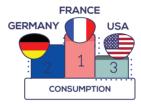
The CIVP's Economic Analysis Department also encompasses the Economic Committee, whose role is to perform monthly tracking of market balances and changes, both within the wine region and in terms of national and international sales. Based on that tracking, it then produces market summaries.

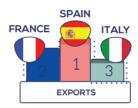


Co-chair



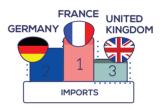
Philippe Brel Co-chair





- 10+ summary reports on thematic market studies disseminated
- · 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

FRANCE USA **SPAIN** PRODUCTION



· Some of the department's other functions include organizing, managing and analysing specific quantitative and qualitative studies for the purpose of shedding light for consumers on the wine market in France and abroad.

Analysis of sales and management of market research (post-market)

 The Economic Analysis Department purchases and makes use of many industry sales analyses, such as sales of still wines by French food retailers, both independently and in conjunction with other interprofessional councils (members of the CNIV).

Rosé Wines World Tracking

- 45 countries studied
- 20+ experts consulted to glean the **latest trends** on the markets
- Use of many consumer focus groups
- Monitoring since 2002, enabling the identification of long-term trends
- A one-of-a-kind tool recognized by industry professionals



MARKET RESEARCH AND ANALYSIS: 2022 FINANCIAL YEAR

Rosé markets in 2022

- 1. Releases to market: Within a complicated economic climate, Vins de Provence wines continued to hold strong with releases to market that were generally on the rise. The situation differed from one PDO to the next however, depending on each one's positioning and markets:
- 828,006 hl of Côtes de Provence rosés, up 4%
- 183,167 hl of Coteaux d'Aix-en-Provence rosés, down 4%
- 117,360 hl of Coteaux Varois en Provence rosé, stable.
- 2. Exports: In 2022, 462,276 hl of Vins of Provence wines were exported, almost identical to the volume in 2021, which was a record year! After three years of decline, we observed a strong resumption of shipments to the US (up 4%). Among the top 10, Germany, Switzerland, Australia and Spain were also on the rise.
- **3. Food retailers in France:** In a context that saw food retailers' still wine sales fall by 6% (1% for rosé), Vins de Provence rosé sales grew by an average of 3% in 2022.

2022 rosé harvest

- The harvest for the 2022 vintage, amounted to 1,306,460 hl, all colours combined. This figure is an improvement over the previous year's harvest (+2% for Côtes de Provence, +15% for Coteaux d'Aixen-Provence and +4% for Coteaux Varois en Provence).
- The rosé harvest yielded 1,177,355 hl, a 3% increase over 2021.
- Given the slightly low inventory levels at the start of 2023, the Vins de Provence rosés available for sale on the different markets in 2023 are estimated at 1,306,000 hl, 1% more than last year and 4% higher than the three-year average.

DETAILS

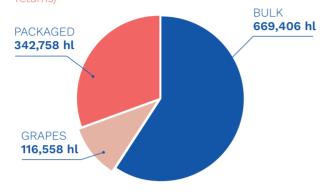
| 2022 HARVEST FIGURES | | | | | | |
|----------------------------|--------|-----------|--------|-----------|--|--|
| VOLUME (in hl) | RED | ROSE | WHITE | TOTAL | | |
| Côtes de Provence | 39,218 | 836,376 | 44,195 | 919,789 | | |
| Coteaux d'Aix-en-Provence | 16,871 | 205,309 | 17,545 | 239,725 | | |
| Coteaux Varois en Provence | 6,480 | 135,670 | 4,796 | 146,946 | | |
| Total Provence wines | 62,596 | 1,177,355 | 66,536 | 1,306,460 | | |

Sales of Provence wines from the vineyards

Sales break down at approximately 60% bulk and grapes and 40% direct from the property.

Sales of Provence rosés from the vineyards in 2022

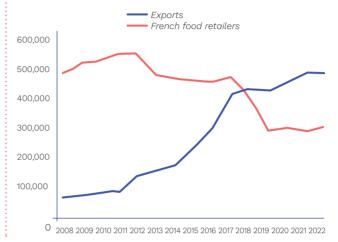
(source: CIVP as per income tax and monthly summary returns)



Breakdown of sales channels in 2022

Breakdown of distribution channels for Vins de Provence wines, all colours combined, based on CIVP 2021 estimates

(In hl; food retailers = hypermarkets + supermarkets + grocer's shops + e-commerce)



Top 10 export countries for Vins de Provence wines in 2022

| | · _ · · _ · | | | | | | |
|----|----------------|---|---------------------------|-------------------------|--|--|--|
| | COUNTRY | Market share out of total exports | Volume in 2022 (in hl) | Value in 2022 (in €) | Average price of a bottle of Provence wine in 2022 (in € FOB ex-VAT) | | |
| 1 | United States | 37% | 170,202 | 143,413,776 | 6.3 | | |
| 2 | United Kingdom | 19% | 85,987 | 64,030,116 | 5.6 | | |
| 3 | Netherlands | 7% | 32,200 | 18,576,608 | 4.3 | | |
| 4 | Germany | 6% | 29,038 | 21,249,876 | 5.5 | | |
| 5 | Belgium | 4% | 18,119 | 11,187,100 | 4.6 | | |
| 6 | Canada | 3% | 14,349 | 11,718,515 | 6.1 | | |
| 7 | Switzerland | 3% | 13,504 | 12,933,697 | 7.2 | | |
| 8 | Sweden | 3% | 12,873 | 7,697,640 | 4.5 | | |
| 9 | Australia | 3% | 13,922 | 9,573,867 | 5.1 | | |
| 10 | Spain | 2% | 8,224 | 8,199,332 | 7.5 | | |

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

See your summary calendar of wine declarations



DON'T MISS OUT!

The CIVP's Economic
Analysis Department
launched a project in late
2022: a calendar of French
wine declaration due dates.
The goal was to present
all the due dates of the
declarations that wine
producers and merchants
are required to submit.

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

s we implement our Strategic Plan 2022-2024 and face new challenges (continuation of our premiumization, market slowdowns, increased competition for newcomers attracted by the success of Provence wine, etc.), the mission of the Marketing & Communication Department revolves around two main pillars:

- 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
- Operational marketing. whose goal it is to roll out competitive, effective action and communication plans on our priority markets in France and abroad.

2022, a transitional year

2022 was a pivotal year for our new plan, as it involved:

1. Initiating an **in-depth strategic** overhaul with an objective of defining/strengthening the fundamentals of the Vins de Provence brand – namely including its brand platform, its visual identity, its advertising messages and all of the different elements that form its brand experience - from a

TEAM



Guinchard





Caroline Benetti





Eloïse Lapp



Cédric Skrzypczak



Romain Diho



Cronk



Frédéric Ravel





Schalapa



Lou Ligeron

perspective of completely updating our actions, both in France and abroad, before 2023

- 2. Prioritizing strategic investments in our target markets over the next three years and launching international calls for projects
- 3. Rolling out our action plan for the current year, in parallel to the strategic overhaul, across all our markets in France and abroad, with an emphasis on effectiveness, impact, power and enhanced targeting.



FRANCE ACTION PLAN

I. JOINT VINS DE PROVENCE ACTIONS FOR ALL THREE PDOs

A | MEDIA RELATIONS

The programme of media relations actions for 2022 was built on three main pillars:

- Product leadership and publicity for our wines
- The industry's influence and economic success
- Sustainability actions and their promotion in the wine region

2022 in figures:

- > Close to 2,000 articles published in the printed press, equivalent to an advertising investment of €28.7 million, with an impact of 507 million contacts generated
- > 8 press releases produced
- 9 media tastings organized by the CIVP with a total of 1,100+ samples
- > 2 sample product packs sent to wine and product reporters, with more than 90 media spin-offs





B | DIGITAL COMMUNICATION

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

- Website:
 - www.vinsdeprovence.com
- Vins de Provence Facebook page
- @vinsdeprovence Twitter account
- @vinsdeprovence Instagram account
- Vins de Provence YouTube channel
- Vins de Provence Pinterest account
- CIVP Vins de Provence LinkedIn account

The CIVP communicates on social media, with an editorial line specific to each network: an informational strategy on Facebook, an aspirational strategy on Instagram and Pinterest, and a target demographic of professionals on Twitter and LinkedIn.

2022 figures: nearly 14 million people reached by Vins de Provence posts on social media and more than 485,000 interactions.

C | INFLUENCER PROGRAMME

Our influencer campaign focused on topics relating to food, wine, lifestyle and travel, with activations scheduled throughout the year.



D | VINS DE PROVENCE PROFESSIONAL EVENTS

 International fairs: Wine Paris and ProWein 2022

Wine Paris 2022, 14-16 February, Porte de Versailles, Paris

The Vins de Provence Pavilion covered 632 m² of Hall 4 and featured 76 exhibitors and a rosé tasting area serving 90 different wines. Nearly 1,000 came for a taste of those wines.



ProWein 2022, 15-17 May, Düsseldorf, Germany



Because of ongoing pandemic conditions, the 2022 edition was moved to May instead of March. Vins de Provence was present in Hall 10, with 416 m² of space for 49 exhibitors plus a tasting area serving 62 wines that were sampled by 1,500 professionals.

Vins de Provence Wine Competition, 5-6 April 2022

Tastings for the 2022 edition of the Vins de Provence Wine Competition took place on 5 & 6 April at Maison des Vins Côtes de Provence in Les Arcs-sur-Argens.

The judges – 143 professional and amateur tasters – tasted 798 samples of wines in the running and awarded medals to 194 vintages.

The winning bottles were then featured through various partnerships like after-work activities at La Cité du Vin



Winners' Party, 15 June 2022, Château Saint-Maur

Organized with the Var Chamber of Agriculture each year since 2014, this party celebrates the winners of the General Agricultural Competition and the Vins de Provence Wine Competition. 266 people were in attendance, including winners of the two competitions and guests from the worlds of tourism, politics and economics.





E | VINS DE PROVENCE CONSUMER EVENTS

Côté Caves en Provence, 1 July to 31 August 2022

Any Vins de Provence company with a winery shop that's open to the general public can participate in the Côté Caves game.

Customers are given scratch cards for a chance to win Vins de Provence branded items.

This year, 38,160 prizes were up for grabs, 360 kits were produced, and 219 wineries registered for the game.





F | COMMUNICATION TOOLS

Promotional items

The CIVP has a catalogue of Vins de Provence promotional items designed to boost our collective brand image. Those items are available for winemakers and merchants to purchase and are also given out at our events and through our partnerships.

· Communication materials

Communication materials designed to develop knowledge of the Provence wine region are available to our winemakers as well as in response to external requests (from schools, wine merchants, trade, media, etc.).

G | RETAIL ACTION PLAN

A three-part action plan targeted food retailers:

- 1. Trade media plan: A specialized trade press campaign aimed at B2B professionals was run in the form of two advertisements, one in *LSA* (print circulation of 20,000 copies) and *Rayon Boissons* (7,500 copies)
- Creation of two newsletters in collaboration with Editions Dauvers (a retail publishing house) in May and July 2022, sent to wine section managers and distributed at 5,600 hypermarkets, supermarkets and grocer's shops
- Co-financing of another round of instore activities days at food retailers between April and September 2022. This action involved 1,283 days divided between Vins de Provence as a whole and the three PDOs, 34 businesses and 70,000 PDO brochures handed out.





II. COTES DE PROVENCE SPECIFIC PROGRAMME

A | MEDIA PLAN

In the spring and summer of 2022, the Côtes de Provence media plan was based on three channels:

Press: To work on our reputation in a qualified, affinity-based way

27 insertions in national consumer publications (cooking, news and women's press) / 2 insertions in trade publications (beverages) / 25 insertions in regional publications (fine dining and news)

Results: 6.4 million copies / 19.1 million contacts

Digital: Particularly effective for our affinity-based targeting Purchases of 100% programmatic ad space, in

static or animated formats 6.5 million impressions / 2.4 million videos viewed in full

Tactical in-store advertising:

Designed to work on our presence in consumers' minds as close as possible to the point of sale

Zones covered: Coastal areas nationwide

Results: 1,112 screens / more than 19 million estimated contacts.

BIDIGITAL COMMUNICATION

The CIVP developed a series of video capsules to promote the PDO on social media, revolving around two key themes: terroir and expertise. Posted on Facebook and Instagram, they generated more than 600,000 views in total.

C | INFLUENCER PROGRAMME

This campaign focused on influencers with food, wine, lifestyle and travel content.

D | MEDIA RELATIONS PROGRAMME

· Côtes de Provence Mook



The second edition of the Côtes de Provence wine mook was set in the world of ski resorts. In February, 12,500 copies were sent to Le Monde

newspaper subscribers in Paris, Lyon and Marseille. More were disseminated at various ski resorts thanks to a partnership with La Folie Douce. And a digital campaign generated more than 3.5 million impressions.

E | COTES DE PROVENCE SPECIFIC PROFESSIONAL EVENT

Nice Côtes de Provence Rendez-Vous, 28 March 2022, Le Negresco Hotel, Nice

This event took place on Monday, 28 March, at Le Negresco. It brought it 200 industry professionals and journalists who were given the chance to taste 70 rosés in the event space and



130 wines of all three colours in the aperitif and lunch space.

Lunch was prepared by the Michelinstarred Chef Virginie Basselot and served in the Royal Reception Room.





III. COTEAUX D'AIX-EN-PROVENCE SPECIFIC PROGRAMME

INFLUENCER PROGRAMME

This influencer campaign revolved around lifestyle and food topics, with a lifestyle influencer visiting the region in the summertime to discover the PDO, plus food and wine pairing content created throughout the year.



IV. COTEAUX VAROIS EN PROVENCE SPECIFIC PROGRAMME

A I MEDIA PLAN

The Coteaux Varois en Provence media plan concentrated on digital channels. A three-month campaign (15 May to 15 August) aimed at carefully chosen targets yielded 2.6 million impressions and more than 500,000 videos viewed in full.

B | COTEAUX VAROIS EN PROVENCE SPECIFIC PROFESSIONAL EVENT

4 April 2022 marked the 20th anniversary of the Coteaux Varois en Provence PDO. It was celebrated with personal encounters with the 49 wine-makers in attendance, a free tasting area and food and wine pairing classes led by Maison Ducasse and developed by Alain Ducasse and a Michelin-starred local chef.





GENERAL INTERNATIONAL

COMMUNICATIONS







SOCIAL MEDIA ACTIVITIES

YEAR ROUND

Activity on our US Facebook, Instagram and Pinterest pages in the form of content creation and posting. The campaign generated a total of more than 2.2 million impressions and grew our community by 11,000 fans.

MEDIA RELATIONS & TV SEGMENT

YEAR ROUND

Through our Press Office, Vins de Provence is in constant contact with America media, including two press releases, two sample product packs sent to media and one TV segment. Our far-reaching programme yielded more than 130 articles and 1.36 million impressions.



PARTNERSHIPS WITH INFLUENCERS 24-26 SEPTEMBER



Five influencers, each with her own focus, shared their visions of how to enjoy Vins de Provence wines

with their communities by creating 43 exclusive posts that reached more than 70,000 people.

VINEXPO AMERICA TRADE MASTERCLASS

9 MARCH

At Vinexpo America, Vins de Provence capitalized on the presence of professionals from the wine sector by leading a training session that reminded 65 participants why the world's best rosés come from Provence.



PARTNERSHIP WITH WINE ENTHUSIAST

4-25 AUGUST

Wine Enthusiast is a leading wine magazine in the US, read by both wine industry professionals and informed consumers. Four posts on the publication's Instagram account reached some 535,000 contacts.

NEW YORK TIMES ARTICLE

28 JULY TO 31 DECEMBER

When Vins de Provence was featured in America's top newspaper, it was important for our messaging to be visible on our number 1 export market. This powerful, affinity-based coverage revolved around the online publication of an article penned by journalist Claudine

Ko and its promotion in the digital ecosystem of *The New York Times*. This messaging via a major media outlet exceeded our reach targets by a factor of seven, with no fewer than 77 million impressions.

The New York Times





SOMMCON

6-8 NOVEMBER

Making the most of the presence of American professionals at SommCon, three activations were organized: a masterclass taken by 54 participants, a lunch with 62 lucky guests and a tasting table that offered every visitor the chance to sample a selection of 20 different wines.









SOCIAL MEDIA ACTIVITIES

YEAR ROUND

Retaining our focus on Canada's three primary provincial markets, we produced posts and published them on Facebook and Instagram. A combination of contents, partnerships with content creators and photo shoots allowed us to exceed our reach and engagement targets.





PRESS OFFICE

YEAR ROUND

We achieved organic media coverage by publishing two press releases, sending samples in response to editorial requests and maintaining a continuous connection with journalists. A total of 23 multiplatform posts were seen by a combined audience of 32.6 million people.

PARTNERSHIP WITH A KOL

20 AUGUST TO 8 DECEMBER

Influencer Audrey Rivet expressed her vision of the brand with her community through a variety of modern content tinged with local culture. Those 20 posts generated 300,000 social impressions.

SAQ BUYERS' TRIP

20-23 JUNE

Three decision-makers from the SAQ, Quebec's alcohol monopoly and the single biggest buyer of French wine in the world, spent four days touring our wine region. The 17 businesses they visited and the 60 wines presented during a special tasting led to 15 products being selected by the SAQ to be introduced or maintained on the Quebecois market.





SAQ.COM VISIBILITY PROGRAMME

18-24 AUGUST

This campaign meant our wines were featured on saq.com, in a content article presenting six of our products, a banner in the home page, an advertisement in the website's "Inspiration" section, and visibility in the SAQ Inspire newsletter. These arrangements generated around 345,000 impressions.

LCBO VISIBILITY PROGRAMME

17 JULY TO 13 AUGUST

Provence products were showcased for a month at 68 LCBO locations (Ontario's alcohol monopoly). A total of 2 million consumers were exposed to this operation, leading to 14.4% growth in the category compared to 2021



PARTNERSHIP WITH LES FRANCOS DE MONTREAL

10-18 JUNE

Vins de Provence partnered with one of Montreal's biggest public cultural events, which gave us access to a million festival-goers at our dedicated stand, decorated in the colours of Provence, not to mention the fact that our wines were also sold at all of the event's bars. Over the course of nine days, festival-goers sipped on eight of our wines while watching the event's 200 concerts.











PRESS OFFICE

YEAR ROUND

Two press releases sent to 1,635 journalists yielded 71 media spin-offs.



IN-STORE PROMOTIONS 18 MARCH TO 30 NOVEMBER

We collaborated with five retail chains to showcase an enhanced selection of Provence wines and give customers the chance to learn by taking seminars

or reading documentation available at the shops or online.



PARTNERSHIP WITH TOKYO CALENDAR 7 JULY TO 2 AUGUSTS

In partnership with the renowned Tokyo Calendar magazine, 53 lucky influencers were able to attend an exclusive party in an event space that was completely

redecorated for the occasion. On the programme were workshops, mini-seminars and other activities for participants who widely broadcast their experiences to their communities (7.5 million impressions). An article was also published on the magazine's website, accompanied by a social campaign to give it maximum visibility.



843 hl





exported in 2022

INFLUENCER CAMPAIGN ON DOUYIN & RED

25 NOVEMBER TO 31 DECEMBER

This vast campaign activated around 100 influencers on two major Chinese platforms. Each of them received a bottle of wine, with the task of showing their perfect experience of enjoying a Provençal rosé. The 116 posts that this produced largely exceeded the campaign's targets, achieving a total of 22 million views.

SOCIAL MEDIA ACTIVITIES ON WECHAT, RED & DOUYIN

25 NOVEMBER TO 31 DECEMBER

We facilitated posts on the Vins de Provence accounts on three platforms, each with its own targets and formats: 8 educational articles on WeChat, 35 aspirational posts on RED and 6 videos on Douyin. These complementary platforms content allowed us to spread our key messages and generated 4.5 million









PRESS OFFICE

20 APRIL TO 15 DECEMBER

Six press releases were sent to Australia's biggest media.

CONSUMER MEDIA PLAN

20 SEPTEMBER TO 18 NOVEMBER

We partnered with Australia's premier culinary magazine, Gourmet Traveller, to implement a comprehensive media plan including a full-page advertisement, a three-page editorial, an online article and a social media post... for a total audience of 1.9 million people.



TRADE MEDIA PLAN

1 MAY TO 10 DECEMBER

We renewed our partnership with the no. 1 magazine for Australians working in the beverage sector, *Drinks Trade*. A feature story, tasting notes, advertising pages, a newsletter and banners on the home page kept our wines in the minds of professions in the industry, both before and during the summer season.

TRADE MASTERCLASSES 26 & 28 SEPTEMBER



Sydney and Melbourne both hosted a masterclass designed to help 76 professionals enhance their knowledge of our wines. Taught by sommelier Matt Dunne, these sessions revolved around the diversity of our products and how to pair them.



PARTNERSHIPS WITH INFLUENCERS

23-31 DECEMBER

Six food and wine influencers received three bottles each of rosé, along with a recipe and the ingredients needed to make it. This way, they were able to share the whole Provençal cooking and tasting experience with their communities.



PARTNERSHIP WITH TIME OUT

OCTOBER TO DECEMBER

We had a dedicated page on the website of this magazine that specializes in local events and experiences: how to learn about Vins de Provence wines, as well as how to find them and – most importantly – how to enjoy them. An associated banner campaign, which redirected users to the article, reached an audience of 1.1 million people.

SEASONAL SIGNAGE IN SYDNEY

21 NOVEMBER TO 31 DECEMBER

26 buses travelled all across the streets of Sydney in the height of summertime, proudly displaying our campaign created to remind consumers that the real drink of the season is rosé. This original strategy reached 6.6 million people on their daily commutes.









TRADE MASTERCLASS

3 OCTOBER

Master Sommelier Cameron Douglas taught a masterclass for professionals. The 26 participants tasted 6 of our wines and were then asked to pair them with a wide variety of canapés concocted for the occasion.



CONSUMER MEDIA PLANNOVEMBER & DECEMBER

A partnership with Are Media rolled out a multitude of content in different formats, incorporated into the group's premium publications covering topics like lifestyle, travel, things to do, etc. The resulting editorials, ad pages and online articles were seen by an audience of 3.6 million people.



PARTNERSHIPS WITH INFLUENCERS

21-23 DECEMBER

Three food and wine influencers received three bottles each of rosé, along with a recipe and the ingredients needed to make it. This way, they were able to share the whole Provençal cooking and tasting experience with their communities.



BILLBOARD CAMPAIGN

4-25 DECEMBER

It would have been hard to miss this Vins de Provence campaign, with its 90 dynamic billboards on public roads and animated signs in the country's airports. This set-up was as effective as ever, generating 6.8 million impressions.









PROMOTION IN THE DINING SECTOR

1 JULY TO 31 AUGUST

We partnered with 15 restaurants in Hong Kong to expand their Provence wine offerings and showcase them in their communications.

PROMOTION AT WINE SHOPS JULY & AUGUST

Over the course of two months, 21 shops (including their e-commerce

sites) promoted their Provence wines with in-store decorations plus a digital campaign conducted on social media to generate foot traffic to their brick and mortar locations.

SAMPLE PRODUCT PACKS FOR MEDIA & INFLUENCERS JULY

15 publications received a press kit containing two free bottles and a press release about our wine. Four influencers

were also invited for a tasting by wine merchants and restaurateurs. The operation gave rise to 69 articles and 13 social media posts.









SINGAPORE MEDIA PARTNERSHIP

JUNE TO OCTOBER

A mixed print and digital programme included articles and videos featured in *Epicure*, Singapore's leading luxury food magazine, and in its partner publications. These were promoted by banners and social media in order to maximize their visibility.



SINGAPORE INFLUENCER PARTNERSHIPS

16 SEPTEMBER TO 18 OCTOBER



Three influencers with very different profiles (an actor, a chef and a music producer) recorded their favourite ways to pair and enjoy Provençal rosés in original, personal video

formats and shared them with their communities, generating a total of 110,000 impressions.

VIETNAM CONSUMER MEDIA PLAN

OCTOBER TO DECEMBER

A 360° media plan encompassed content articles in multiple premium magazines, a system of banners and social media posts that redirected users to the digital versions of those articles, and a partnership with a lifestyle influencer.







TRAINING FOR PROFESSIONALS

30 MAY

In the heart of the capital city, 30 professionals attended training led by an enthusiastic sommelier.





TRAINING FOR TASTEMAKERS

30 MAY

10 journalists and 19 influencers met at Le Jardin, a French restaurant in Seoul, for a truly "chill" event dedicated to Vins de Provence wine. They learned about key aspects of rosés and then shared them with their readers and communities in 11 articles and 30 posts.





ONLINE EVENT

11 JULY

Wine 21 magazine subscribers were invited to log into an original online event during which a sommelier and a chef worked together to prepare two recipes paired with Vins de Provence wines. This was an opportunity to talk about healthy cuisine and an ecofriendly wine region, two subjects that are major concerns amongst today's consumers.





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





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
 1.8 million contacts.
- In September, six brand ambassadors travelled across Italy's Valtènesi wine region in a vintage van, speaking at events where they relayed the campaign's messages to their followers. Their tour reached 870,000 people.
- Nine food and wine influencers created original content and shared it with their followers, with a total of 1.1 million people seeing it
- · Three journalists spent three days



visiting six companies covering all three PDOs, discovering novel food and rosé pairings

during gourmet dinners and receiving training on our wines. Our collaborations with those media reached 2.5 million people.

WEBSITE AND SOCIAL MEDIA YEAR ROUND

- A website was designed in the campaign's three official languages, where key messages were disseminated along with news about events in the targeted markets. 4,000 unique visitors came to the website.
 www.pdorosewines.com
- Three Instagram accounts were created to provide a fun way for the millennial target demographic to learn about the PDOs, with 7 million potential contacts.
 Average engagement: 6%.

ADVERTISING

NOVEMBER & DECEMBER

 A social media optimization (SMO) campaign was implemented to boost the visibility of organic content on Instagram and generate traffic to the campaign's website. Divided into three phases, it used sponsored posts and Meta advertising to get 22.8 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. Results: 3.2 million impressions.

COMMUNICATION TOOLS

YEAR ROUND

- A communication concept gave the programme its visual identity.
 A graphic charter was developed to ensure the campaign presented a consistent, harmonious image across all the target markets.
- 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 4.3 million times.

EVENTS

JULY & AUGUST

- Tastings were arranged at local festivals, with a reach of 260,000 consumers, including 39,000 direct contacts. In Germany, we participated in the Gourmet Festival Düsseldorf (26-28 August), where we gave visitors the chance to try eight of our wines. In Belgium, 10 tasting evenings were held between July and September at the comedy festival IL Est Temps d'En Rire (with 14 wines represented).
- Masterclasses on PDO rosé wines were given to 46 representatives from

the German, Dutch and Belgian media and trade. On the programme were tastings, food and wine pairings and presentations of key messages (history, terroir, expertise, lifestyle and environmental engagement). 12 wines were represented in these classes.













PRESS OFFICE

YEAR ROUND

In 2022, 35 wines registered for Press Office actions were represented in six press releases as well as during regular interactions with British journalists, generating 243 articles in the general and specialized press with a total **audience of 296.5 million readers**.

SOCIAL MEDIA 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: 389 posts, 39,800 interactions and 7,460 followers (up 72% from 2021).

Facebook: 151 posts, 441 interactions and 2,393 followers.

A collaboration with six influencers to create dynamic content (reels) reached a combined **audience of 215,000 followers** and generated 11,000 reactions.

EDUCATIONAL SESSIONS AT HAMPTON COURT PALACE FESTIVAL

9-25 JUNE

We organized 66 short, entertaining tasting sessions led by two experienced educators, David Kermode and Nina Cerullo, every night of the music festival. **1,320 festival-goers** and the attendees of the gala dinner discovered the 17 wines they presented.



PARTNERSHIP WITH TATLER

A two-page advertorial positioned Vins de Provence as iconic rosé wine and touted its qualities and versatility with reference made to our three PDOs. The advertorial was written by the food writer and influencer Nina Parker and was published in the magazine's July bumper issue, to coincide with the Queen's Silver Jubilee (in shops on 26 May). The print run was 79,000 copies, read by 237,000 people.

COLLABORATION WITH ONLINE RETAILERS

JUNE & JULY

Promotion of Vins de Provence wines through two online retailers, Virgin Wines and Cambridge Wine Merchants. The campaign reached 13,000 subscribers to the the Virgin Wines newsletter and 5,600 subscribers for Cambridge Wine Merchants, bolstering sales for both businesses.

PRESS TRIP

16-19 OCTOBER

We invited three journalists on a trip to Provence. Their itinerary gave our guests the chance to meet winemakers, enjoy the lifestyle and hospitality for which Provence is known, and go back home having become real brand ambassadors for Vins de Provence. Digital content and seven press articles generated **2.1 million impressions**.



ROSE SESSIONS

NOVEMBER

A round table on Vins de Provence wines was moderated by Andrew Catchpole (*Harpers*) with several speakers from the wine region, the media and the retail world discussing "The Future is Rosé – What Next for Provence?" This was a unique opportunity to develop knowledge of Vins de Provence rosés and the associated trends amongst 70 sales agents, distributors, importers, retailers and media representatives.

SIGNAGE ON LONDON TAXIS

JUNE TO AUGUST



For 12 weeks, the city of London got a touch of Provençal style with a fleet of nine Vins de Provence branded cabs with a variety of iconic, creative decorations. We launched this action with a photocall, when we staged the fleet of taxis in two quintessential London locations, Notting Hill and in front of the London Eye, and at the Hampton Court Palace Festival where we had an educational stand. Four partner influencers publicized this initiative on their social media, giving their followers the chance to win a bottle of Vins de Provence rosé. Total reach: 2.8 million people.

DRINKS BUSINESS AWARDS, BEST CONSUMER CAMPAIGN

CUBE, our communications agency in the United Kingdom, earned a Drinks Business Award for our 2022 consumer communication campaign. DB Awards are among Britain's most highly coveted prizes in the sector.

PARTNERSHIP WITH FARROW & BALL

JULY

We collaborated with the British paint manufacturer Farrow & Ball to give consumers the opportunity to make their lives a little "roséer" by painting their front doors a light pink colour.

For two weeks, we promoted a contest on our social media and in collaboration with influencers, for five of our followers to win cases of Provence wine and the chance to have their front doors painted pink. Results: **296,000** impressions, 2,000 contest

entrants and 11,000 interactions.



TRADE MEDIA PLAN

DECEMBER

A series of advertorials and interviews appeared in the big three trade media: *The Buyer, Harpers* and *The Drinks Business*. In addition to having a set theme for each publication, all the articles featured information about Vins de Provence Expériences along with a link to register for an experience. Total audience reached: **399,000 British trade members**.







INFLUENCER CAMPAIGN

MAY & JUNE

Two German influencers spent three days exploring the region and created high-quality content seen by **337,000**

people.

A partnership with the women's lifestyle magazine *Freundin* (involving a sponsored article and social media posts) allowed us to disseminate content based on the influencers' work, generating **64,000 impressions**.



CONSUMER PRESS MEDIA PLAN

APRIL TO JUNE

We developed a media plan that included powerful, affinity-based publications on the German market:

Frankreich Magazin (lifestyle magazine, circ. 30,000), Bunte Genuss & Stil (lifestyle magazine, circ. 120,000), Lust auf Genuss (food and wine magazine, circ. 227,000) and Weinwelt (food and wine tourism magazine, circ. 52,000).

TRADE PRESS MEDIA PLAN FEBRUARY 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) and a Vins de Provence banner displayed in the Meininger newsletter (26,000 subscribers). An editorial report was also published in Frankreich Spezial, which was distributed at ProWein.

PROGRAMMATIC CAMPAIGN

MAY TO AUGUST

A digital advertising campaign was run using the programmatic platform Teads, which allowed us to display static and dynamic adverts on specific online media, based on precise audience targeting. Those advertisements redirected users to www.vinsdeprovence.com. We exceeded our initial target, with a total of **2,686,379 impressions**.









33,042 hI exported to the Netherlands in 2022

CONSUMER PRESS MEDIA PLAN – NETHERLANDS

APRIL TO SEPTEMBER

A media plan was developed with Leven in Frankrijk (lifestyle and tourism magazine, circ. 25,000). This partnership featured editorial reports, an ad insertion, a banner on the publication's website and an advert in the newsletter sent to 25,000 contacts.



CONSUMER PRESS MEDIA PLAN – BELGIUM

APRIL TO SEPTEMBER

We developed a media plan with several lifestyle, fashion, home décor and fine dining magazines, in both of the market's languages. Editorial reports appeared in the print and online version of ELLE (circ. 45,000),



ELLE à Table (circ. 60,000), ELLE Decor (circ. 119,000), L'Officiel Hommes and Marie Claire. Two posts were also published on the magazines' social media accounts, with banners included in their newsletters.

PROGRAMMATIC CAMPAIGN

MAY TO AUGUST

Like in Germany, a digital ad campaign was run using the programmatic platform Teads, which allowed us to generate 3,201,537 impressions in Belgium and 2,792,487 in the Netherlands.









6,088 hl exported to Denmark in 2022

PARTNERSHIP WITH SAMVIRKE

MAY

An editorial and quiz were published in Denmark's most-read magazine (a young, trendy and topical publication with 1,100,000 readers) and relayed on social media and in the newsletter.

Reach of 529,000 people for 314,000 impressions. 10 of our rosés were mentioned.

PARTNERSHIP WITH "VINSIDER"

APRIL TO JUNE

"Vinsider" is the monthly supplement of *Dagens Nyheter*, Sweden's biggest daily newspaper. Three editorials were published and relayed in the newsletter. Combined with six unsolicited articles, this partnership reached **1,940,000 readers**. A special Provence tasting was also organized in Stockholm for 80 participants. Nine

wines sold by the Swedish alcohol monopoly were presented there.



BASTILLE DAY PARTNERSHIP FRENCH EMBASSIES IN ITALY AND VATICAN CITY

To celebrate **Bastille Day** (France's independence day), the French Embassy in Rome and the French Embassy to the Holy See organized two events in the heart of the Italian capital city.

13 July – Villa Bonaparte: 600 guests, including diplomats from embassies to the Holy See, the Roman Curia, the French and Italian community, and political figures, were able to enjoy

nine of our rosés at this garden party.

14 July – Farnese Palace: 1,500 guests were hand-picked for the holiday: members of the French community, business leaders, the Italian political class and the media. Vins de Provence was the event's exclusive wine partner for all three colours, with 28 products being served



REGIONAL COORDINATION DEPARTMENT

he idea for the Regional Coordination Department emerged 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:

- Develop relationships between the CIVP's members, elected representatives and staff
- · Disseminate information and communicate better with upstream
- Build and promote wine tourism options for Provence wines.

The Regional Coordination Department is committed to four main issues:

• Member relations: This year, the challenge was to review the CIVP's communication and reputation tools before establishing an action plan for

TEAM Delphine Moreau 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:





the coming years

- Coordination of the five Côtes de Provence DGCs: The big innovation in 2022 was to bring the DGCs together for joint actions
- Creation of partnerships: Between Vins de Provence and the three PDOs, we already have many partnerships with solid roots, so the work in 2022

focused on defining a strategy for the future

Promotion of wine tourism: In addition to the joint promotion of Vins de Provence wines to regional and national tourism professionals, this goal this year was to initiate strategic discussions of wine tourism offerings for Vins de Provence.

Part of the Vins de Provence Strategic Plan 2022-2024 is devoted to the relationship between the CIVP and its members. In 2022, we conducted a survey of our members with the Gece institute, to gain a better understanding of them. That survey allowed us to:

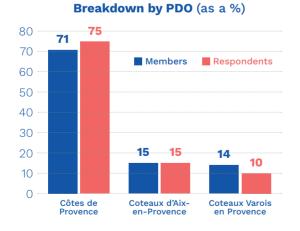
- 1 Enhance the **reputation** of the CIVP and its missions
- 2 Improve our knowledge of our members
- 3 Identify and understand their needs and expectations
- 4 Identify the challenges facing the CIVP

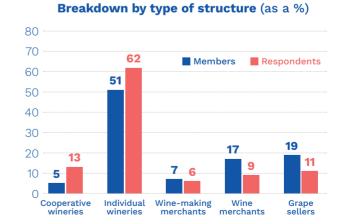
- Revisit our internal communications (tools, frequency, format and content)
- Adapt our services to offer better support to our

The survey was split into two stages:

- · A quantitative survey to get to know our members better
- · A qualitative survey to expand on the initial results.

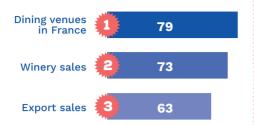
QUANTITATIVE SURVEY: TO GET TO KNOW OUR MEMBERS BETTER





A total of 365 completed surveys, representing 338 establishments, or 60% of our member establishments. A majority of smaller structures (5 or fewer employees), except for wine merchants (10 or more employees).

Top 3 distribution and sales channels (as a %)



Satisfaction (as a %)



73% of respondents are **satisfied** with the CIVP's actions.

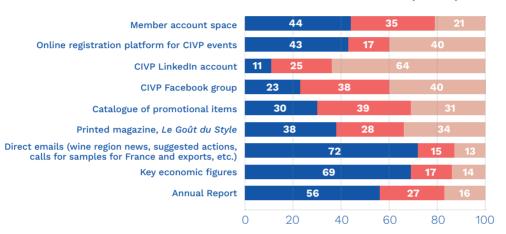
16% aren't sure if they are satisfied with those actions.

Certifications (as a %)

78%

44% organic and 36% HEV

CIVP internal communication tools (as a %)



I use this tool

- I am aware of this tool but don't use it
- I am not aware of this tool

Low level of familiarity with / use of the CIVP's social media (LinkedIn and Facebook) and the member account space.

Excellent level of satisfaction with direct emails.

QUALITATIVE SURVEY: TO EXPAND ON THE INITIAL RESULTS

Nine members interviewed by phone in individual discussions lasting 35 to 60 minutes.

Member information channels



Contact with the CIVP

- O. Direct emails
 - Telephone support for regulatory compliance
 - Discussions at events
 - CIVP dynamics, suggestions and ideas
- Too much information that's not tailored to the business (calls for export samples)
- Difficulty reaching the teams by phone and/or obtaining satisfactory responses
- Lack of physical proximity
- Absence of onboarding (especially for smaller structures)

Knowledge of the CIVP

- Confusion between the CIVP, the syndicates, the federations and the Chambers of Agriculture
- Lack of understanding of the CIVP's objectives
- Lack of visibility of the actions arranged by the CIVP

Sense of belonging

- Pride of contributing to the reputation of Vins de Provence wines
 - Sense of belonging to a strong and diverse group (Vins de Provence)
- Sense of belonging inversely proportionate to distance
- Need to meet the other actors on the value chain
- Not enough time to be more involved

Needs and expectations

- · Advice, ideas and tools to implement at member structures
- · Advice on strategic choices
- Availability of content for the general public
- · Networking
- Hiring assistance
- · Simplified access to economic data
- More involvement in R&D

The next step is to define an action plan tailored to our members' needs and expectations.

WINE TOURISM

Guide du Routard



The 4th volume in the new "Œnotourisme" collection (first released by *Le Routard* in 2019) was launched on 20 January 2022 at Maison des Vins Côtes de Provence and on 28 February at the Paris International Agricultural Show. The new guide covers the terroirs of seven appellations: Côtes de Provence, Coteaux d'Aix-en-Provence, Coteaux Varois en Provence, Bandol, Baux de Provence, Bellet and Cassis.

Destinations Vins de Provence App



Available in French and English, Destinations Vins de Provence is a free app that gives users continuous access to the latest wine tourism offerings in the Vins de Provence region, searchable by keyword or by theme. It can be

used to locate 290 winery shops, 140 restaurants and 90 wine merchants and wine bars, and to view a calendar listing all the events scheduled in the wine region. It is continuously updated with information from the Apidae tourist office database.

Destination Vignobles

9th edition – 4 & 5 October 2022 – Aix-en-Provence

This trade event is organized by Atout France every other year. It aims to promote French wine regions to foreign tourism professionals.

2022 figures:

- 156 international tour operators from 43 countries
- 153 French exhibitors
- 4,300 trade events scheduled (up from 3,800 in 2018!)



This year, five pre-tours were jointly organized in Provence with Atout France, the PACA Regional Tourism Committee and the Aix-en-Provence Tourist Office, with 52 foreign tour operators participating.

The welcome reception was on Monday, 3 October, in Aix-en-Provence, with 430 people in attendance: foreign tour operators and French exhibitors in the presence of eight wine-makers who introduced their wines on site.

A ½-day workshop took place at the Aréna du Pays d'Aix in Aix-en-Provence, featuring 10 Vins de Provence winemakers. More than 20 events were scheduled for the CIVP.

A gala with 450 guests was held at Château La Coste.



Le Fascinant Week-end

3rd week-end in October – Thursday to Sunday, 13-16 October

Created in 2019, Fédération Vignobles & Découvertes represents 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, which extends a regular invitation to the general public to visit different wine regions.

Each year, the programme of activities 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 2022: Nationwide: 61 participating destinations, 9 geographic regions, 17 geological regions and 40,000 estimated visitors. In Provence Bandol & Sud Luberon, for our five Vignobles & Découvertes destinations: 133 participating partners with the V&D label, 120+ activities provided and 2,700 estimated visitors, up 78.8% from 2021.



PARTNERSHIPS & OPPORTUNITIES

he 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 or branded items.

Vins de Provence partnerships

In 2022, Vins de Provence continued to provide assistance to Jeunes Agriculteurs du



Var and the FNSEA farmers' federation through two events: Place à l'Agri in Draguignan on 26 March and Rosé

Day in the Gulf of Saint-Tropez from 20 to 23 July.

Vins de Provence also supports cultural associations like the Opéra de Toulon, the Chateauvallon-Liberté national theatre, the Opéra Nice Côte d'Azur and the ACID Festival which takes place during the Festival de Cannes.

Côtes de Provence partnerships

Although a handful of events were cancelled, the Côtes de Provence PDO was still present for many local initiatives like Nuit des Vignerons de la Motte, Festi'Vin & Terroir, Millé Zim Zim and the Autour du Vin & des Terroirs fair in Draguignan.

After a three-year hiatus, Rallye Sainte-Victoire made its comeback, once again with the support of Côtes de Provence.



The partnership with the Festival de Ramatuelle & ses Nuits Classiques was also renewed. The event took place from 27 July to 12 August at

the outdoor Théâtre de Verdure de Ramatuelle, with programming that was even more impressive than before.

Coteaux d'Aix-en-Provence partnerships

All the Coteaux d'Aix-en-Provence partnership events were able to take place in 2022. The Fête de la Vigne et du Vin was held in the Bouchesdu-Rhône department on Saturday, 28 May, followed by the Coteaux d'Aixen-Provence Wine Festival in Rogne on 24 July.

This year marked the beginning of a partnership with the Vasarely Foundation, after Coteaux d'Aixen-Provence and the CIVP signed a three-year sponsorship agreement.



In this way, the PDO is contributing to the restoration of the work of an artist with deep ties to the city of Aix

Coteaux Varois en Provence partnerships

The Coteaux Varois en Provence Section renewed its commitment to three events: the Rallye Découverte des Coteaux Varois en Provence, the Soirées Musicales de l'Abbaye de la Celle and the Foire de Brignoles.

COTES DE PROVENCE DGC SPECIFIC PROGRAMME

he CIVP runs communication and promotional actions for the DGCs. These actions supplement any that the DGCs may set up within their organizations.

Joint action: Dinner for the 5 DGCs at Cheval Blanc Paris



The CIVP, accompanied by the Clair de Lune agency, organized a tasting and a prestigious dinner with wine pairings at the Michelin 3-star restaurant at Cheval Blanc Paris. The goal of this action was to boost the DGCs' reputation with 35 professionals from the dining sector, journalists and influencers. Two representatives from each DGC were in attendance to meet the guests and have them taste typical wines from their DGCs.

Côtes de Provence Notre-Dame des Anges

1st edition of Sur les Chemins des Anges – Sunday, 22 May, at Château Réal d'Or in Gonfaron

The CIVP and Côtes de Provence Notre-Dame des Anges wine-makers organized an image-building event aimed at consumers. The objectives of this event were to help the DGC establish deep roots in its region, have visitors discover its wines and their special features, and boost its reputation. Two itineraries were defined with the help of the Cœur du Var Tourist Office, and a treasure hunt was created to guide the event's participants along the way. The itineraries were punctuated by activities with nature guides, a beekeeper, the ASL forest management association and



Diam Bouchage. At the end of the route, the event's 14 vineyards gave more than 200 participants tastes of their Notre-Dame des Anges wines.



CÔTES DE PROVENCE
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