



RIOJa

ANNUAL REPORT

QUALIFIED DESIGNATION
OF ORIGIN RIOJA
REGULATORY BOARD

2023

EXECUTIVE SUMMARY

A DENOMINATION WITH A PRESENT AND A FUTURE

In the current context of markets experiencing an economic slow-down and decreasing wine consumption around the world, we could define 2023 as a challenging year. At the domestic level there are signs of concern for households too, due to decreasing purchasing power with no expectation of recovery following the pandemic, which is affecting wine sales and consumption.

Despite this uncertain outlook, the Qualified Designation of Origin Rioja has managed to keep its leading position, maintaining a 27.7% share of the domestic market and achieving almost a 40% share of exports of national wine with a designation of origin.

In order to maintain that position and, above all, to keep moving forward despite the challenging circumstances we faced throughout 2023, the key is to preserve our emphasis on the diversity and richness of a designation that is the socioeconomic engine of its region, working with dedication, perseverance and responsibility, always with the common Rioja interests in mind.

As we navigate this journey, we will continue to show that we are a resilient designation that can work for the public good and with the unwavering commitment that this highly concerning situation

requires. We must not forget that our strength lies in the history and the land that we share, and also in our DNA as genuine pioneers that allow us to overcome any challenge (of which there have been many in nearly 100 years) with bravery, flexibility and professionalism.

In addition to our strength, we have four key differentiators working in our favour, meaning that we can look forward to the future with optimism: The experience gained from almost a century of history, our region's diversity and uniqueness, the support of the consumers who choose us as their preferred designation and our position at the top of the national wine tourism ranking, with almost 880,000 visits to our wineries, making for a great model on an international scale. All of that has put us in the position of reference that we hold today.

It should be noted that during this year, we also continued to pursue innovation, the digitalisation of our sector and sustainability at all levels, with the goal of generating value in our environment.

It became obvious in 2023 that we are a designation with a significant ability to adapt, that must face up to complex situations with maturity and trustworthiness and that we are committed to our land, its history and its values.

But above all we want to keep on bringing value to people, being close to them every day as well as at moments of celebration. Staying at their side and being chosen as their wine and land-mark destination is the true secret of our success.

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IS LOCATED



FERNANDO EZQUERRO,
Chairman of the QDO Rioja
Regulatory Board

BENCHMARK OF KNOW-HOW AND EXCELLENCE

Driven by passion and with its characteristic dynamic spirit, the Qualified Designation of Origin Rioja has the mission of promoting the quality of its wines around the world, in order to maintain its leading position within the Spanish wine sector. With its sights set on the future, Rioja tries to keep a sustainable production model, conquer new markets and con-

solidate its positioning, maintaining its quality, diversity and its know-how. In fact, Rioja is more than a Designation of Origin, it is one of the most recognised wine brands and has a living legacy that keeps writing its history with every harvest, establishing its position as an essential point of reference for quality in Spain and abroad, and each day gaining more and more followers.

THE DESIGNATION OF ORIGIN RIOJA, IN FIGURES (2023)

VITICULTURE

66,902
hectares OF REGISTERED VINEYARDS*



3 PRODUCTION AREAS

144
MUNICIPALITIES



118 La Rioja
18 Álava
8 Navarra

748
REGISTERED WINERIES



578
WITH BOTTLING
REGISTRATION

14 AUTHORISED
GRAPE
VARIETIES



13,874
WINEGROWERS

148 "UNIQUE
VINEYARDS"
RECOGNISED
BY MAPA, FOR
90 TITLES,
ON OVER **246** HECTARES



* 1,295 hectares have been registered for green harvesting in the 2023 wine year.

HARVEST

Rating: **VERY GOOD**



From 10th August to
24th of October

377,071,354
kilogrammes of ENDORSED GRAPES



259,531,232
litres of ENDORSABLE WINE

238,263,910
LITRES MARKETED
(-5.18% compared to 2022)



325 MILLION
BOTTLES
marketed

SALES



Variation in
TOTAL SALES
compared to 2022:
-5.18%

SPAIN

-3.54%
in VOLUME



MARKET SHARE:

27.2% in volume*
30.7% in value*

EXPORTS

-7.57% in VOLUME
- 5.55% in VALUE

SHARE of SPANISH STILL WINES
WITH POD:

36.8% in volume**
40.6% in value**



More than
40%
OF SALES
outside Spain

135 COUNTRIES

*Source: NielsenIQ. **Source: Observatorio Español del Mercado del Vino.

REGULATORY BOARD: COMMITMENT TO THE FUTURE OF RIOJA

The Regulatory Board is the organisation responsible for overseeing, defending and promoting the Qualified Designation of Origin Rioja, with the aim of protecting the character and quality of its wines and raising awareness of its product. Under the auspices of the Spanish Ministry of Agriculture, Fisheries and Food (MAPA), it is made up of 32 members representing five winery associations and eight winegrowers' associations, i.e. all

the associations in the sector, and these same members form the Board of Directors of the Rioja Wine Interprofessional Organisation, the chair of which also holds the chairmanship of the Regulatory Board by virtue of the existing regulations. The respective representatives of MAPA and the autonomous administrations of La Rioja, the Basque Country and Navarra also participate in the Plenary with a voice, but without vote.

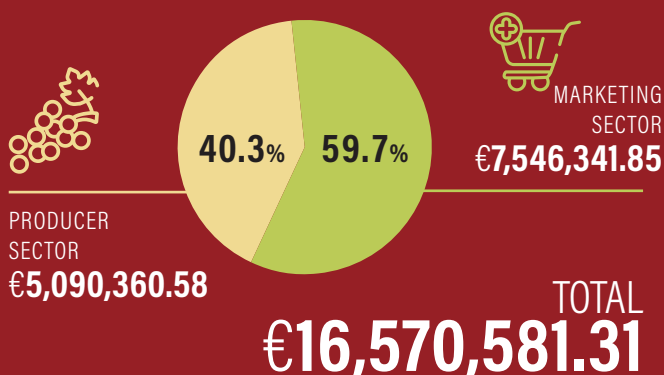
THE BOARD HELD
**8 PLENARY
SESSIONS**
IN 2023

Committed professionals

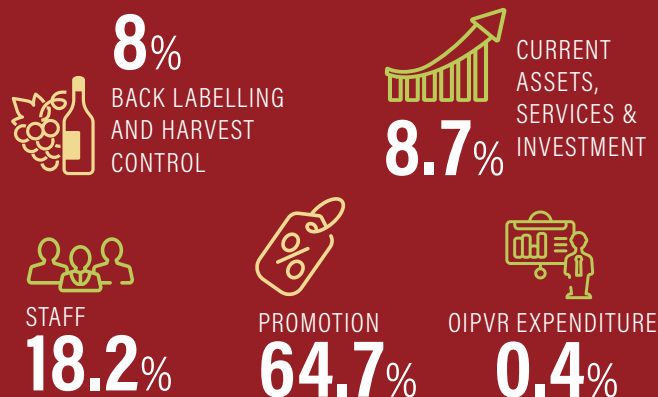
Within QDO Rioja there is a team of people who work tirelessly to promote Rioja, its objectives and interests; a group of talented colleagues who, with their ethics and professionalism, continue to consolidate it at both a national and international level. At the end of 2023, it had a team of 49 members of staff. Apart from the members and the board, the staff is mainly divided between the Administration, Legal and Marketing and Communications departments.



DESIGNATION OF ORIGIN BUDGET (2023)



ITEM BREAKDOWN



REINVIGORATING THE BRAND

The 2021-25 Strategic Plan designed by the Regulatory Board reached the halfway point in 2023. From this middle point, there is enough perspective to appreciate the progress achieved towards the goal of consolidating Rioja as one of the most recognised wine regions for its quality, singularity and diversity and to strengthen the position of reference that it has in the market.

In this way, Rioja keeps working to ensure a prosperous future for its stakeholders and

all of the members of the Designation of Origin. The institutional and promotional actions make QDO Rioja an active and relevant part of society, keeping in mind that the consumers are the ones who place their trust in us year after year. Rioja will always be synonymous with hard work, honesty and responsibility.

Big promotional activity

The goal of Rioja's promotional activities is to add value to the brand, increasing visi-

bility of its wines and its territory, boosting wine tourism and positioning itself both as sustainable and innovative, which is the focus of the road map in the Strategic Plan.

Thanks to a very intense effort, characterised by different activities within the national and international campaigns, the QDO promotion manages to gain more fans every year inside and outside our borders.

National Campaign

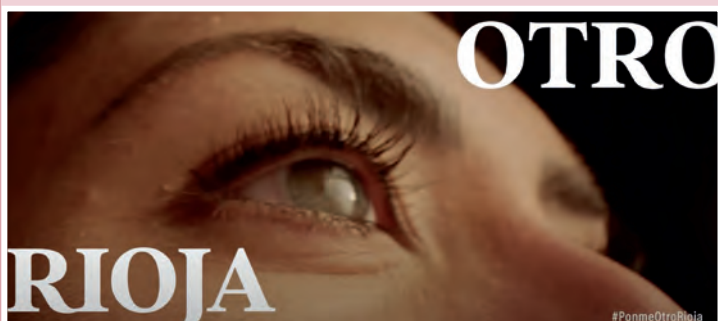
Rioja works to make the diversity and quality of its wines known to both professionals and consumers. Some of the key actions in 2023 were:

- "Ponme otro Rioja" ("Serve me another Rioja") campaign.
- Rioja, official wine of the Spanish cinema Goya Awards.
- Sponsorship of the documentary "Rioja, la tierra de los mil vinos" ("Rioja, land of a thousand wines").
- Seminar for professionals during the Barcelona Wine Week.
- Seminar during "Peñín show of Spain's best wines".
- Seminars in catering schools.
- "Industry Awards Spain" sponsorship.
- Presence in the VII edition of the "Elle Gourmet Awards".
- Presence in the Esquire "Hombres del Año" ("Men of the year").

International Campaign

With an intense effort in an international campaign, the QDO Rioja is gaining more supporters outside Spain. Those initiatives were focused with actions like:

- "Rioja, 100 km of diversity," held in Manchester, Dublin and Zurich.
- UK sommeliers and retailers visit to Rioja.
- "Rioja Grand Tasting" in Orlando (USA).
- US buyers and distributors trip to Rioja.
- Specialised and lifestyle international press trips.
- Presence in "ProWein 2023" (Germany).
- Participation in "Wine to Asia International Wine & Spirits Fair" (China).
- Chinese importer companies visited 36 wineries in Rioja.
- Communication actions with the most important media in Mexico.



A SPACE TO PROMOTE KNOWLEDGE

Rioja Wine Academy was created in 2020, as an online platform started by the Regulatory Board to train specialised educators in Rioja wines and to promote knowledge amongst wine enthusiasts around the world.

During these three years, it has become a benchmark in wine culture education and has strengthened its presence around the world recruiting more and more students willing to learn all the region's particularities. Rioja Wine Academy is part of the QDO strategy: spread and promote its wines, the wider culture of Rioja and the

Designation through professionals trained in excellence, passing their knowledge and enthusiasm for Rioja's diversity and variety through courses at all levels.

The digital platform offers training in the characteristics of Rioja wines, trading and distribution and wine tourism, as well as a specific offering for official instructors and for school alumnae. One new feature is Rioja Enthusiast, a short introductory course offering the chance to learn about the Designation wines. Since 2023, the platform is available in Chinese, as well as in English and Spanish.

RIOJA Wine Academy

IN DATA

EDUCATIONAL SERVICE

6 PROGRAMMES



REGISTRATIONS

+23,000

NATIONALITIES

+125



OFFICIAL INSTRUCTORS



182

SUSTAINABILITY, THE STRATEGIC PILLAR



Rioja aspires to become a reference also in sustainability, as it is already in terms of quality. Sustainability is one of the strategic pillars of the Strategic Plan (2021-2025), with the road map leading the way towards a viable model that guarantees our future. The dynamic character of the Designation makes us understand and work on sustainability in a holistic way, in all its forms, acting not only on the environmental aspects but also on socio-economics and good management.

Rioja wants to have a positive impact within the region and on people's lives, contributing to the prosperity and future of the re-

gion. Rioja's QDO works so people can enjoy as well as its variety and quality of wines, its landscapes and culture that shape its essence and personality. That is why every year we take measures to make sure this valuable legacy gets to future generations.

Activity highlights

- DATADOC Project to monitor vines and climate change.
- Sustainability Diagnosis Project.
- Operational Group for the Protection of Landscape and Vineyard.
- Sustainability Experts Committee.

RIOJA, WINE TOURISM EPICENTRE AND LANDMARK

Rioja is positioned as an attractive destination on the world wine tourism scene, offering a land of contrasts with culture, landscapes, a variety of wines and legendary wineries that value their dedication, quality and tradition. According to the 2023 Wine Tourism Monitor of the Rioja Designation, 204 Rioja QDO wineries received 879,423 visitors.

The economic impact of wine tourism in the region was €186 million, almost 19.55% more than the previous year

Evidence of a sustained growth

The strengthening of Rioja's wine tourism is also reflected by other indicators that point to well-established activity at both national and international levels:

- **International visits are now 32.7%**, 3 points higher than the 2022 figure.
- **Average spending in shops per visitor** keeps rising, **reaching €37.89**.
- **The economic impact of wine tourism in the region reached €185,938,645**, an increase of 19.55% compared to the previous year.



Experiences for everybody

Wineries report that 80.5% of their visitors are amateurs or those interested in wine. In second place, with 66.23%, there are the wine lovers or enthusiasts, who have deeper knowledge about the wine industry and look for more personalised and exclusive wine tourism experiences. Also, 45.45% of visitors identify themselves as gastronomic tourists, interested in wine and regional culinary culture.

The Designation has more than 700 wineries, 204 of them are open and can be visited with friends, family, with your partner or with work colleagues, Rioja has a wide and quality offering to satisfy the needs and interests of everyone that comes to discover and rediscover it.

2023 IN CONSTANT MOVEMENT

879,423

VISITS IN 2023



+17.52%
compared to 2022

32.70%

INTERNATIONAL VISITORS



204

WINERIES VISITABLE

€37.89

AVERAGE SPENDING IN WINERY

+3.72%
compared to 2022



€185,938,645

ECONOMIC IMPACT




+19.55%
compared to 2022

RIOJA

QUALIFIED DESIGNATION OF ORIGIN RIOJA REGULATORY BOARD

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SEE THE 2023 ANNUAL REPORT
OF THE REGULATORY BOARD AND
VITICULTURE, WINERIES AND
MARKETING STATISTICS

