



Innovation in Chilean Wine Industry

Vinnova S.A./Tecnovid S.A.

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ITC, WEDEF

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NUESTRA ASOCIACIÓN
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Directorio
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MERCADO INTERNO
Marketing Nacional
Capacitación Laboral
Comunicaciones
Normas Nacionales
Noticias y Eventos

MERCADO EXTERNO
Wines of Chile
Normas y Relaciones
Internacionales
Noticias y Eventos

I+D+i
Consortios del Vino
Vinnova /Tecnovid
Seminarios y Noticias

ASOCIADOS
Viñas Asociadas
Socios Proveedores
Cómo Asociarse

INFORMACIÓN Y ESTADÍSTICAS
Datos Útiles
Estadísticas Mensuales
Estadísticas Anuales
Clipping de Noticias



WINE INDUSTRY OLD ESTABLISHING ACTIVITY

- Wines in Chile - Pedro de Valdivia -1540 (460 years)
- Introduction of fine vines - 1850 (150 years)
- Consumption per cápita 58 lts/año - 1950 (60 years)
- International Markets - 1990 (20 years)

10º in surface planted



Fuente: International Organization of Vine and Wine, 2009

7º producer

	mm hl
Francia	46
Italia	48
España	33
E.E.U.U.	21
Argentina	12
Australia	12
Sudáfrica	10
Alemania	9
Chile	10
NZ	2
China	
Portugal	6
Otros	59
TOTAL	266

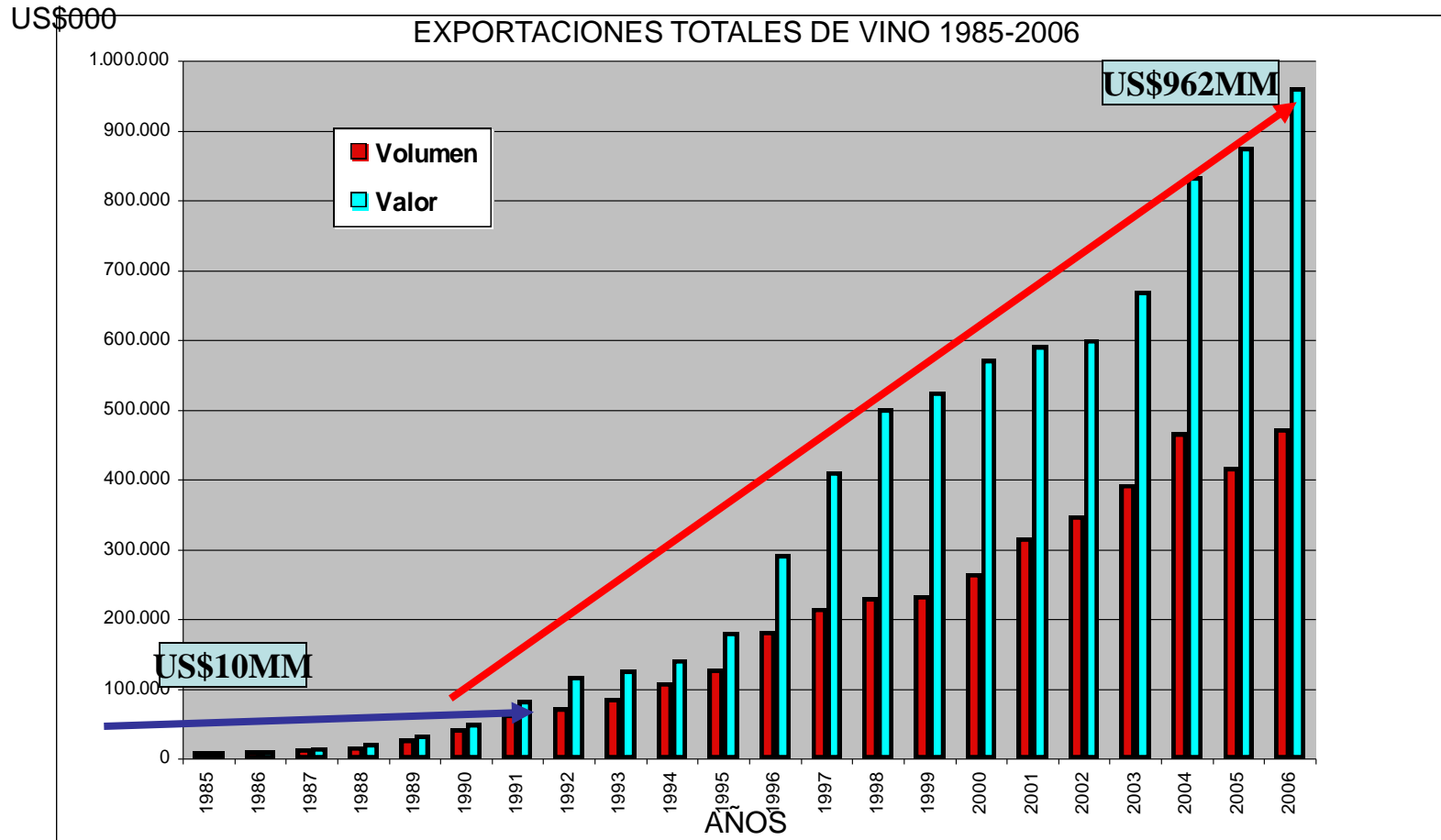
5º exporter

	MM hl
Italia	19
España	14
Francia	13
Australia	8
Chile	7
E.E.U.U.	4
Argentina	3
Sudáfrica	4
Alemania	4
Portugal	2
NZ	1
China	
Otros	8
Total	86

Chilean Wine Industry Growth

- Exports Growth
 - 5° exporter (France, Italy, Spain, Australia)
 - Exports 60% of total production in volume 609 MM Ltrs
 - Exports Growth: US\$ 182.000 to 1.381.000 US\$ 1995- 2009 (17%)
 - Production: 382 mill lts. to 961 mill lts 1996-2009 (8,9%)
- Market diversification
 - 116 countries (last 12 month)
 - 300 exporters (>US\$10.000)

Exports Growth



Export Growth

- Chile is the country with higher proportion exports/production: 68%



Keys of Growth

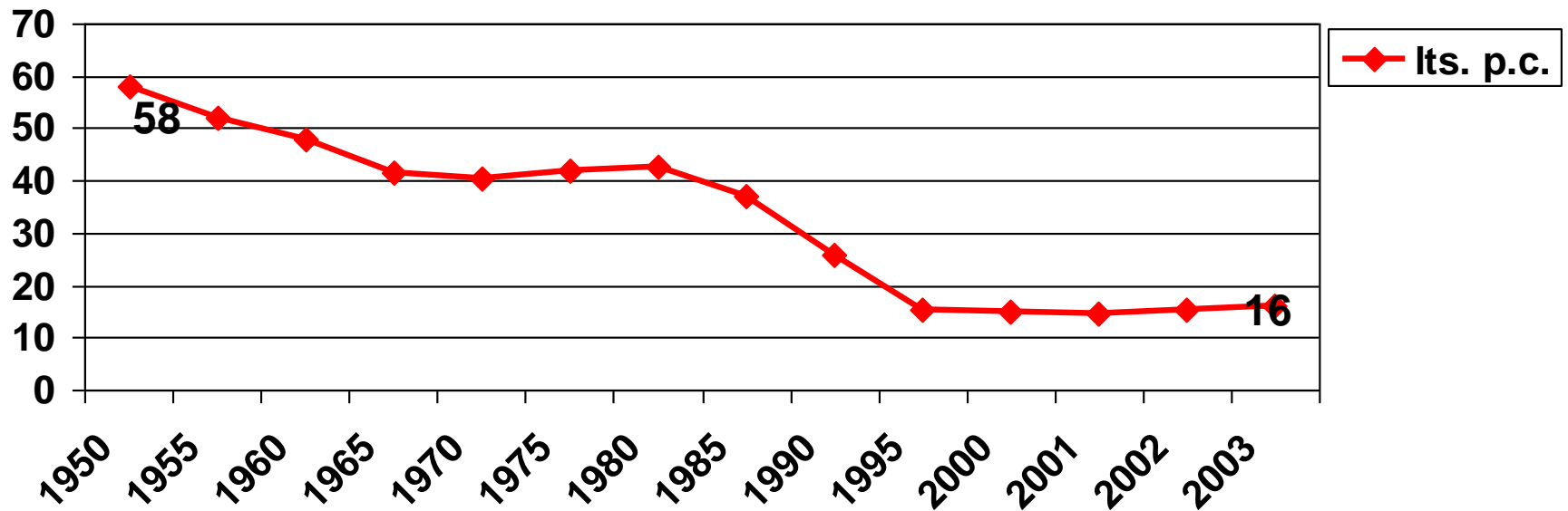
- Institutional and political stability
- Natural Comparative Advantages
- External markets opportunities
- Adaptation Technology from main countries

2000 Change of Scenery

- Lost of competitiveness
- Margin profit reduction
- Internal consume reduction

Wine Consumption

Liters per capita 1950-2003



So Chile needs to continue the exports growth:

From the Industry side

- **Consumers seduction**
- **Profitable quality**
- **Competitive innovation**

So Chile needs to continue the exports growth: Government/Industry Collaboration

- 1. Market Access: International Trade Agreements**
- 2. Promotion Collaboration-Wines of Chile**
- 3. Innovation Collaboration-Wine Consortiums**

1. Market Access: International Trade Agreements

Comercial Agreements in Force

Free Trade Agreements

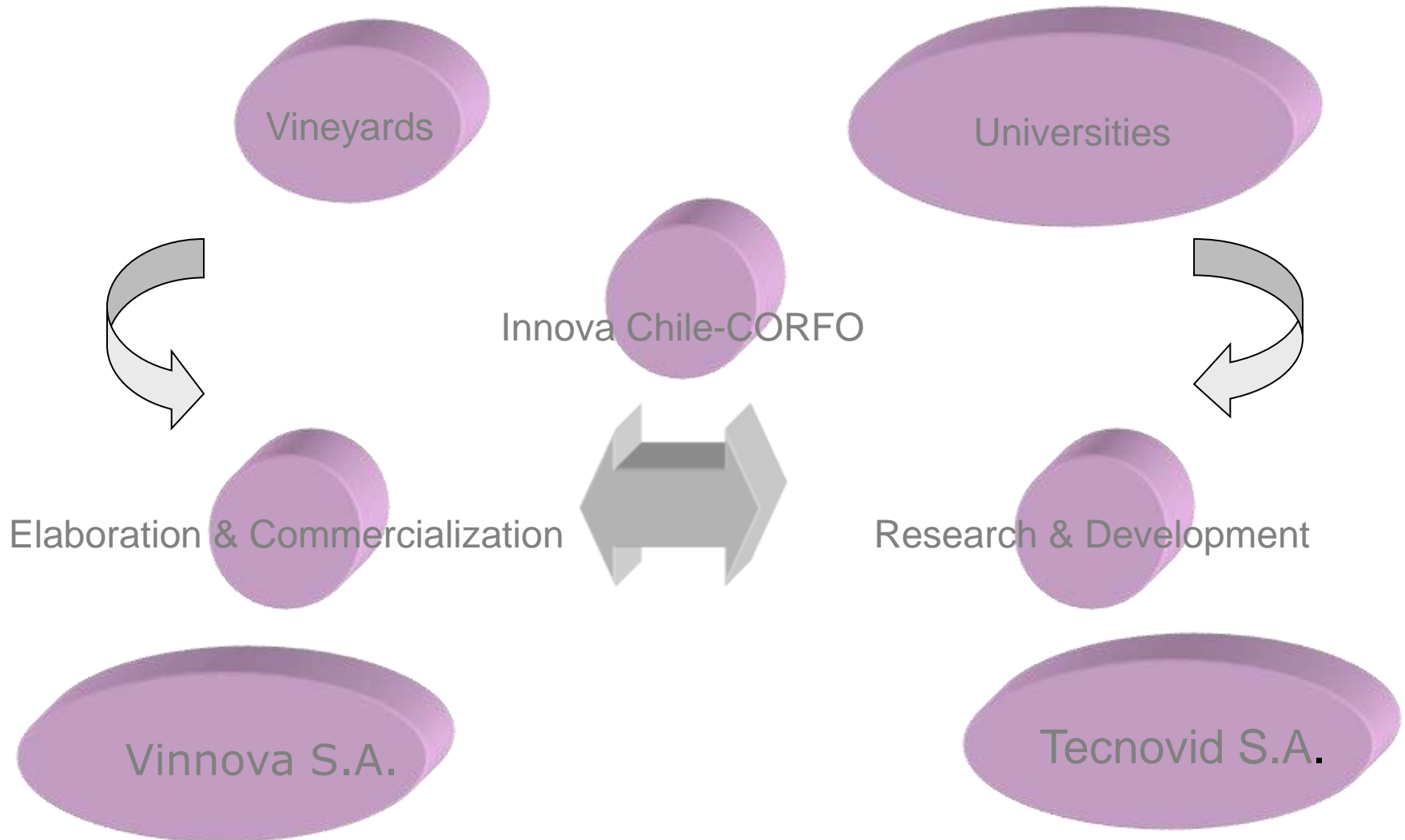
ACE N° 16 Argentina
ACE N° 22 Bolivia
ACE N° 42 Cuba
ACE N° 65 Ecuador
ACE N° 35 MERCOSUR
ACE N° 23 Venezuela
AAP India
AAE P-4 (Nueva Zelanda, Singapur, Brunei y Chile)
AAE U.E.
TLC Australia
TLC Canadá
TLC Centroamérica
TLC China
ALC Colombia
TLC Corea
TLC EFTA (Suiza, Noruega, Lichtenstein, Islandia)
TLC EE.UU.
TLC Japón
TLC México
TLC Panamá
ALC Perú Panamá
ALC Perú

2. Wines of Chile- Government/Industry Collaboration for Promotion



WINES OF CHILE®

3. Innovation Collaboration- Wine Consortiums

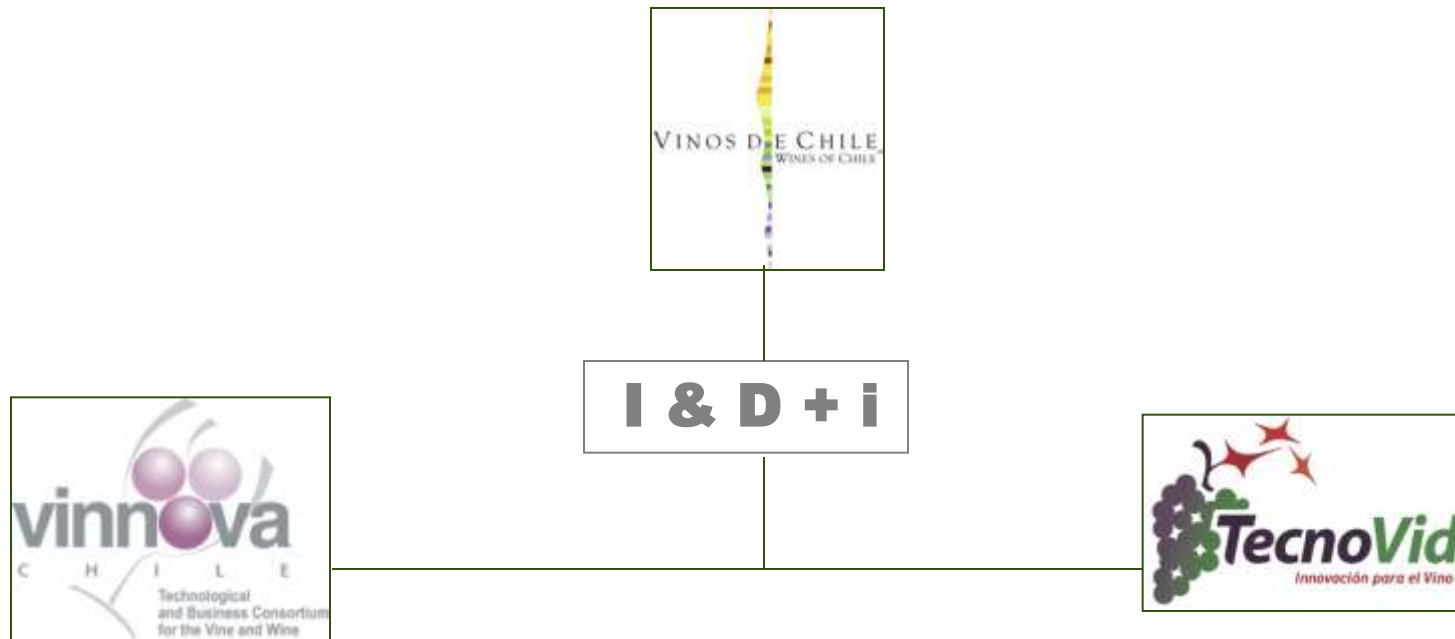


Sustainable Model

Innovation in the complete elaboration
process:

R&D + i

- from the vineyards/wineries
- with the vineyards/wineries
- for the vineyards/wineries



MODEL-24 PROJEC R&D: 10 MM US\$ 5 years 2006

2 PROJECTS R & D 2007

ALIANCE UC DAVIS I & D 2008

7 NEW PROJECTS 2009

SUSTAINABILITY PROGRAM/CONSORTIUMS 2.0 2010



Vinnova and Tecnovid Financing

Initial Investment (5 years, 24 projects) US\$ 10 mill.

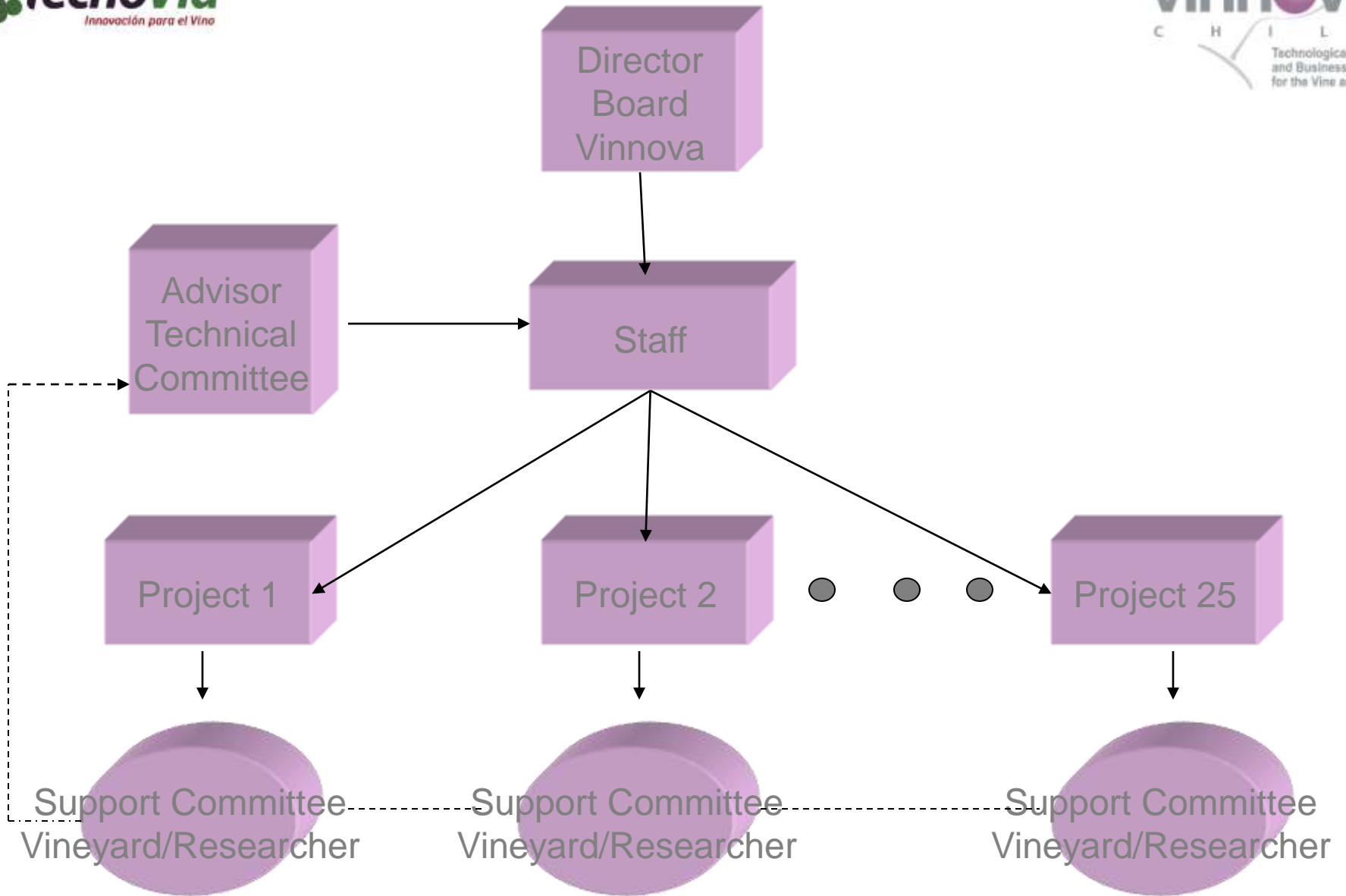
Government (Innova Chile-CORFO) 60%

Private (Vineyards and Universities) 40%

Structure Composition

- 95 Vineyards
- 98% national sales
- 95% exports
- 78 Researchers
- 24 Support Committees (12 projects)
- US\$ 10 mill. initial budget

Structure Organization



I: Consumer Preference

Project 1: Consumer Preference and sensorial characterization

II: Vegetative material y viticulture management

Project 2: Foundation block-germ plasma

Project 3: Virus resistant material

III: Maturation and enology

Project 4: Sauvignon Blanc aroma

Project 5: Wine quality: color, astringency and stability

Project 6: Fermentative capacity

Project 7: Flavonols y chemical markers

IV: Viticulture y environment

Project 8: Dynamics of pesticides

Project 9: Fungi and micotoxines

Project 10: Liquid Industrial Residues (Riles)



I: Viticulture

- Clones
- Terroir
- Maturity
- Metabolic Engineering

II. Oenology

- Biosensores
- E-nose
- Tannins

III. Food Safety

- Biogen Amines
- Pesticides
- Brettanomyces

IV. General

- Benchmarking
- Ph.D and Magister Scholarships





9 New Projects



Sustainability Program

Genomics II

Cooperation Agreement with UC Davis

Cooperation with AWRI



Nuestro objetivo es potenciar la industria vitivinícola chilena en la generación de conocimientos y tecnologías innovadoras necesarias para fortalecer la competitividad de la industria del vino en los mercados globales y aumentar las exportaciones.

Proyectos

- 1 Consumidores
- 2 Bloque - Germoplasma
- 3 Material resistente a Virus
- 4 Aroma Sauvignon Blanc
- 5 Calidad del Vino
- 6 Capacidad Fermentativa
- 7 Flavonoles
- 8 Dinámica de Plaguicidas
- 9 Hongos y Micotoxinas
- 10 Riles
- 11 Transferencia Tecnológica
- 12 Administración



Destacados

Maduración y enología Proveer metodologías y herramientas

que basada en técnicas objetivas de análisis permitan científicamente manejar

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