



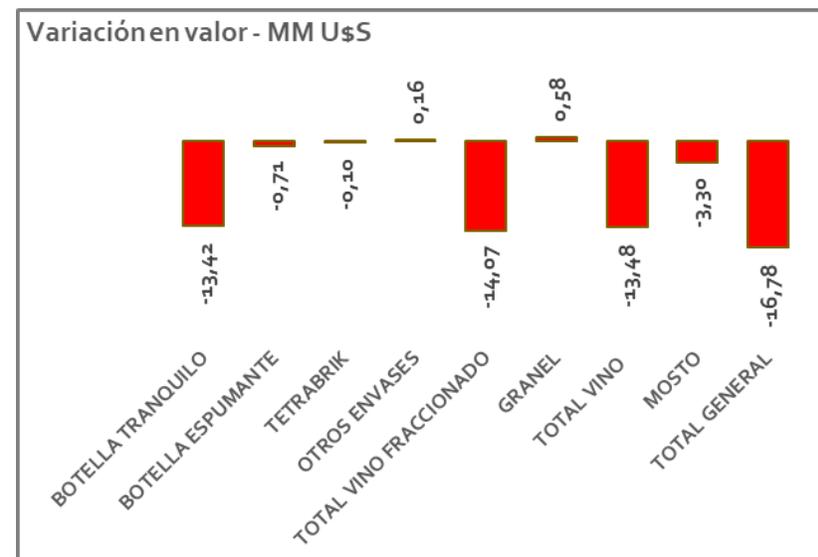
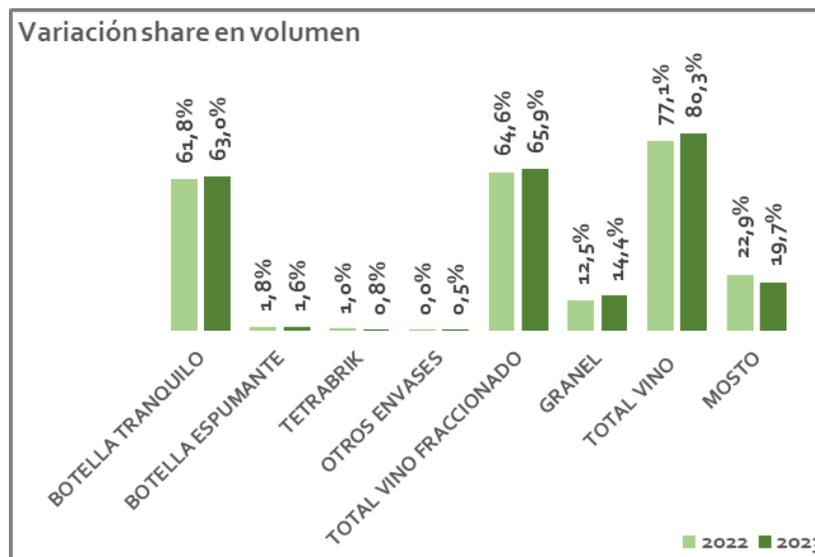
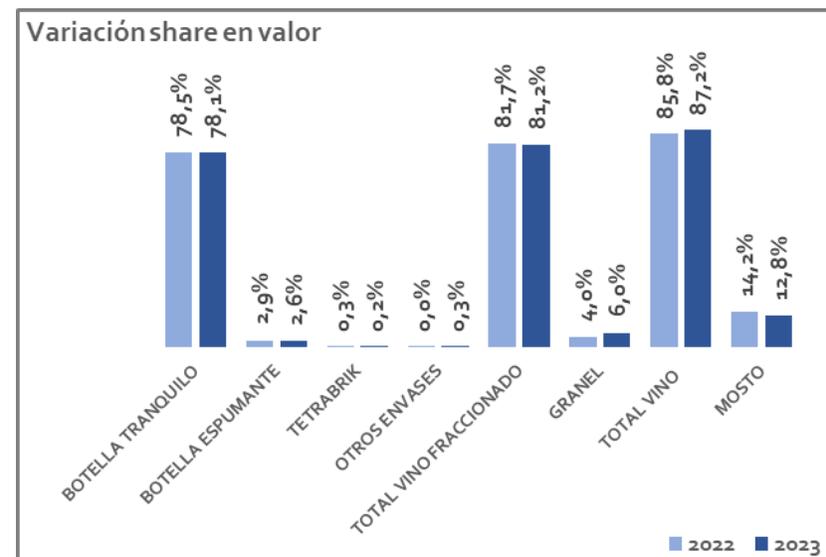
Informe mensual de exportaciones vitivinícolas

Elaborado por el Área de Innovación Universidad Nacional de Cuyo
Bodegas de Argentina – Agosto – 2023

Los datos suministrados en este informe son exclusivamente para uso interno de socios de Bodegas de Argentina y está prohibida su divulgación total o parcial sin autorización expresa de BAAC. La información contenida considera envíos de exportación oficializados.

Exportaciones vitivinícolas por categoría de producto – Julio 2023

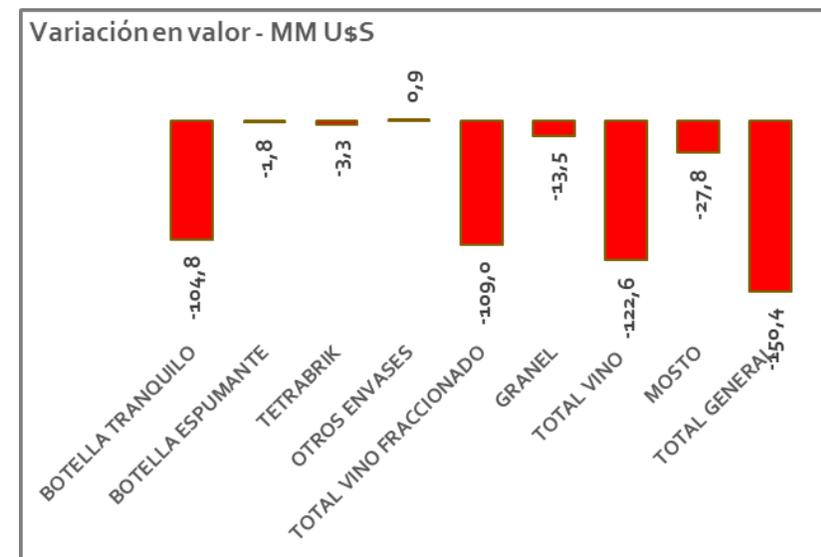
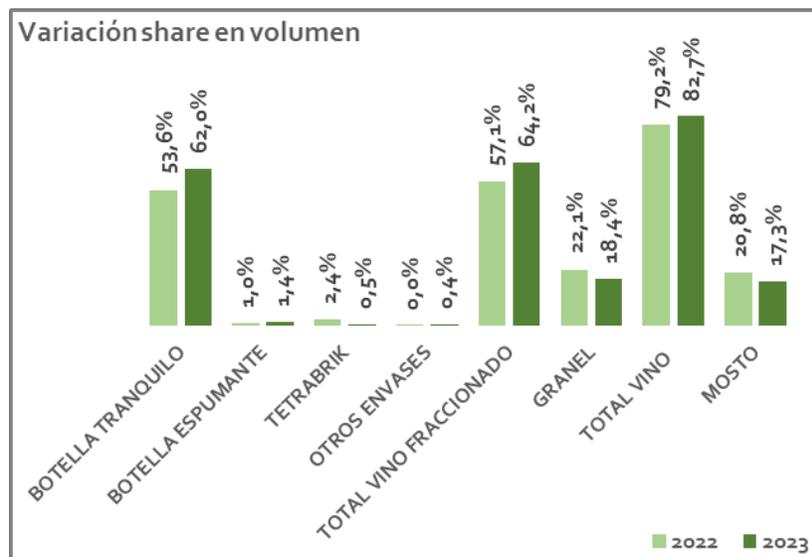
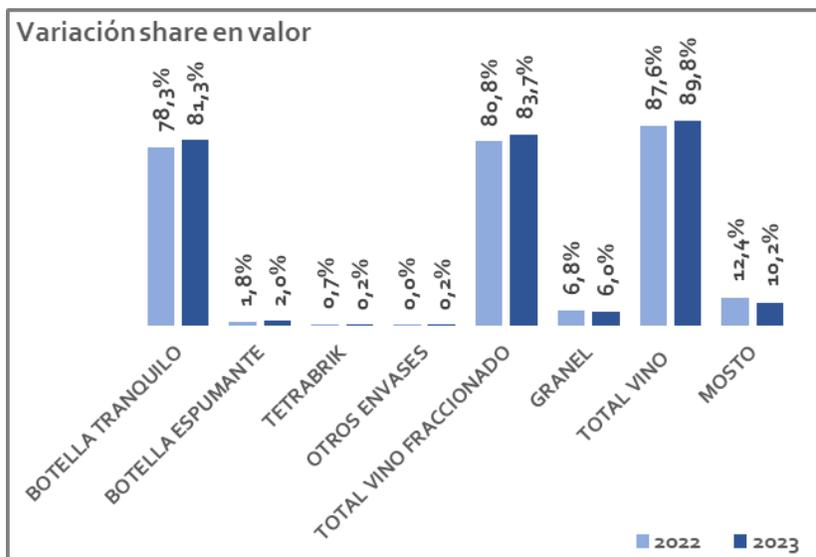
| CATEGORIA DE PRODUCTO | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/LITRO | | | VOLUMEN (LITROS) | | |
|-------------------------------|------------------------|-------------------|---------------|----------------------------|-------------|-------------|-------------------|-------------------|---------------|
| | 2022 | 2023 | VARIACION | 2020 | 2023 | VARIACION | 2022 | 2023 | VARIACION |
| BOTELLA TRANQUILO | 64.048.300 | 50.624.165 | -21,0% | 3,45 | 3,52 | 2,2% | 18.581.372 | 14.369.617 | -22,7% |
| BOTELLA ESPUMANTE | 2.379.049 | 1.672.416 | -29,7% | 4,37 | 4,59 | 5,1% | 544.657 | 364.409 | -33,1% |
| TETRABRIK | 256.381 | 161.362 | -37,1% | 0,82 | 0,88 | 7,7% | 312.061 | 182.341 | -41,6% |
| OTROS ENVASES | 28.973 | 188.528 | 550,7% | 4,58 | 1,75 | -61,7% | 6.326 | 107.495 | 1599,3% |
| TOTAL VINO FRACCIONADO | 66.712.703 | 52.646.471 | -21,1% | 3,43 | 3,50 | 2,0% | 19.444.416 | 15.047.122 | -22,6% |
| GRANEL | 3.287.221 | 3.870.195 | 17,7% | 0,87 | 1,18 | 35,0% | 3.763.587 | 3.282.879 | -12,8% |
| TOTAL VINO | 69.999.924 | 56.516.667 | -19,3% | 3,02 | 3,08 | 2,2% | 23.208.003 | 18.330.001 | -21,0% |
| MOSTO | 11.608.563 | 8.313.298 | -28,4% | 1,69 | 1,85 | 9,8% | 6.881.870 | 4.490.267 | -34,8% |
| TOTAL GENERAL | 81.608.487 | 64.829.965 | -20,6% | 2,71 | 2,84 | 4,7% | 30.089.873 | 22.820.268 | -24,2% |



Exportaciones vitivinícolas por categoría de producto

Últimos doce meses cerrados en Julio 2023 – YTD

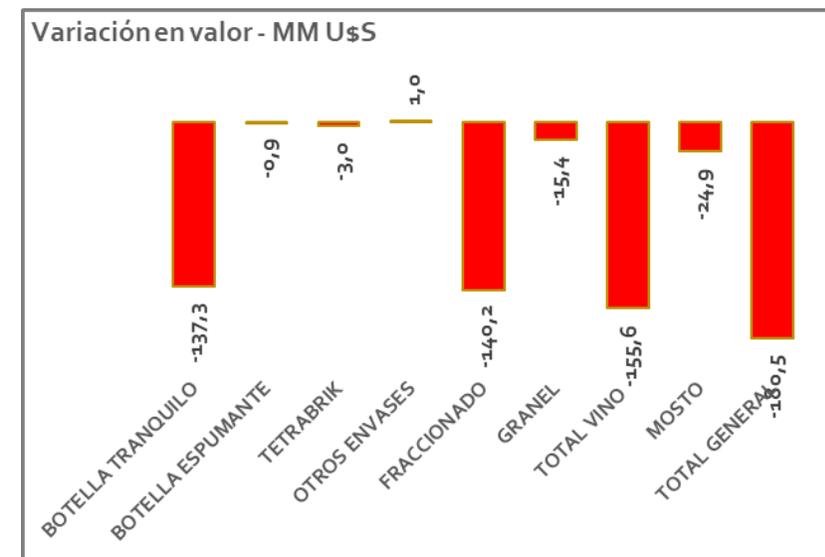
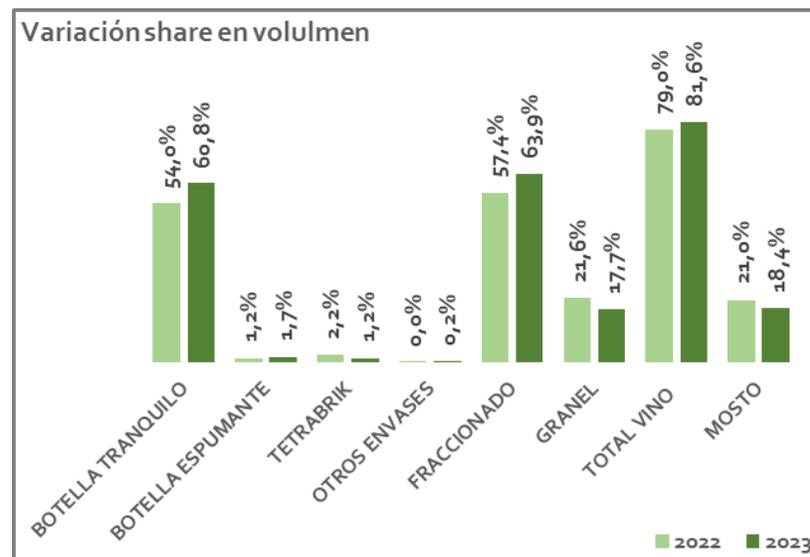
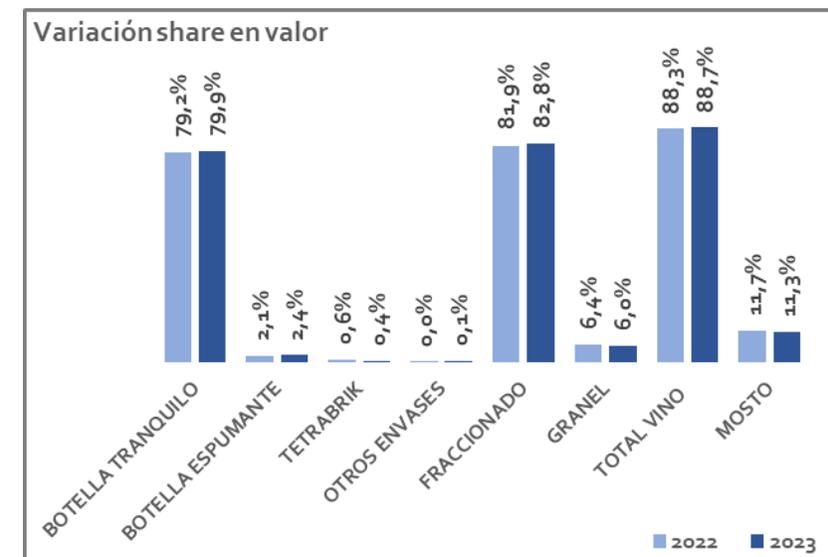
| CATEGORIA DE PRODUCTO | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/LITRO | | | VOLUMEN (LITROS) | | |
|-------------------------------|------------------------|--------------------|---------------|----------------------------|-------------|--------------|--------------------|--------------------|---------------|
| | YTD 2022 | YTD 2023 | VARIACION | YTD 2022 | YTD 2023 | VARIACION | YTD 2022 | YTD 2023 | VARIACION |
| BOTELLA TRANQUILO | 448.618.296 | 343.821.382 | -23,4% | 3,68 | 3,90 | 5,8% | 121.785.966 | 88.208.223 | -27,6% |
| BOTELLA ESPUMANTE | 10.284.585 | 8.463.549 | -17,7% | 4,45 | 4,33 | -2,8% | 2.309.495 | 1.956.049 | -15,3% |
| TETRABRIK | 4.011.044 | 664.038 | -83,4% | 0,72 | 0,91 | 25,6% | 5.556.314 | 732.331 | -86,8% |
| OTROS ENVASES | 80.433 | 1.016.705 | 1164,0% | 4,53 | 1,90 | -58,1% | 17.749 | 535.706 | 2918,2% |
| TOTAL VINO FRACCIONADO | 462.994.359 | 353.965.675 | -23,5% | 3,57 | 3,87 | 8,4% | 129.669.524 | 91.432.309 | -29,5% |
| GRANEL | 39.088.866 | 25.539.783 | -34,7% | 0,78 | 0,98 | 25,3% | 50.226.668 | 26.192.248 | -47,9% |
| TOTAL VINO | 502.083.225 | 379.505.458 | -24,4% | 2,79 | 3,23 | 15,6% | 179.896.193 | 117.624.557 | -34,6% |
| MOSTO | 70.995.933 | 43.174.720 | -39,2% | 1,50 | 1,75 | 16,2% | 47.176.045 | 24.687.028 | -47,7% |
| TOTAL GENERAL | 573.079.158 | 422.680.178 | -26,2% | 2,52 | 2,97 | 17,7% | 227.072.237 | 142.311.585 | -37,3% |



Exportaciones vitivinícolas por categoría de producto

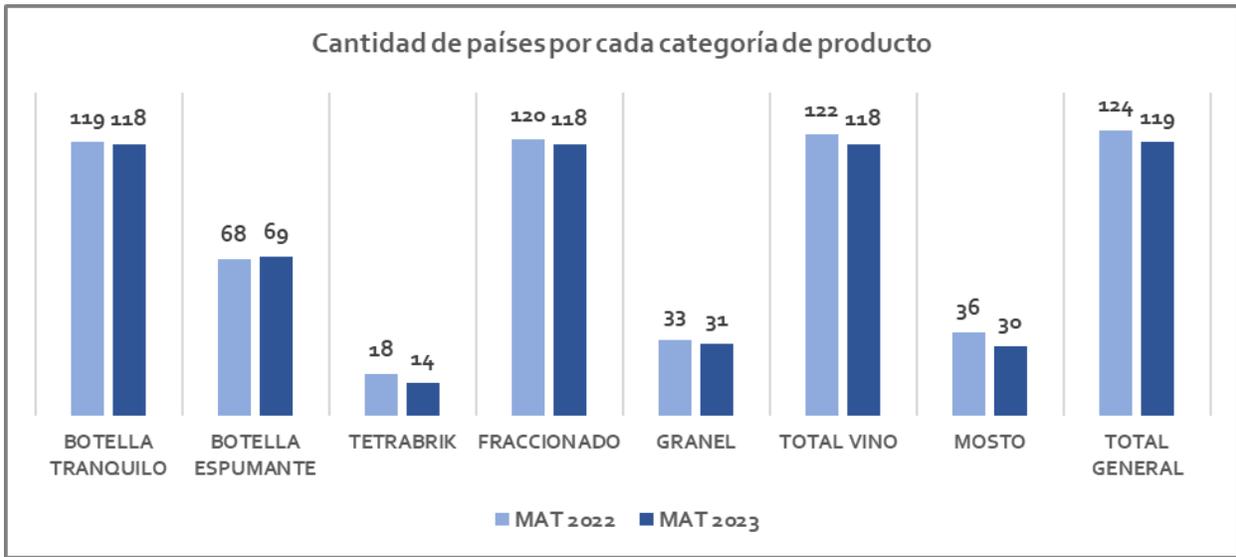
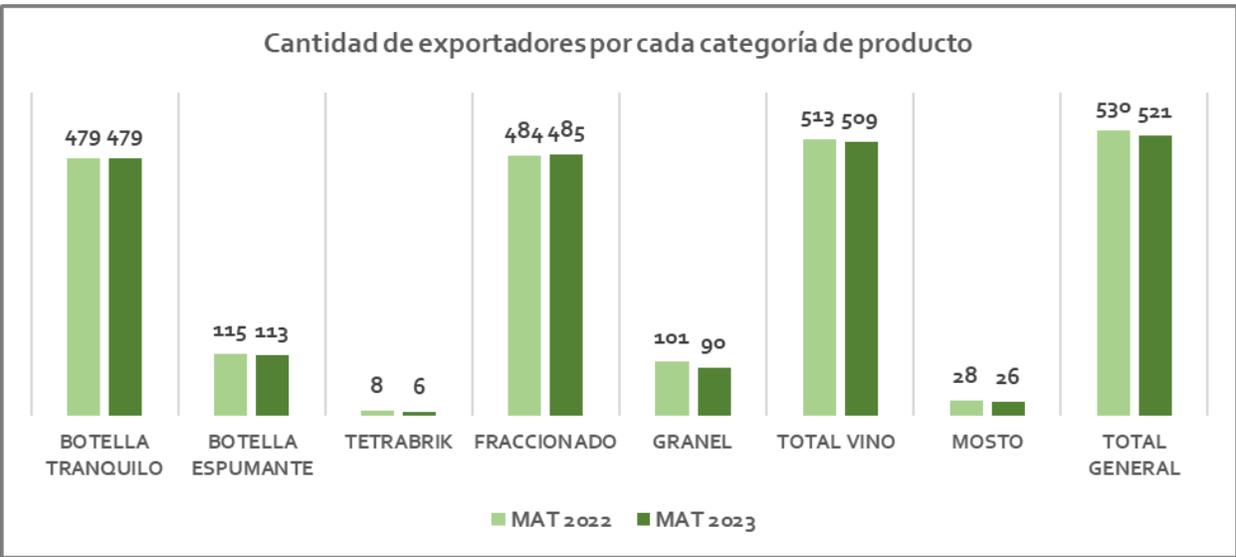
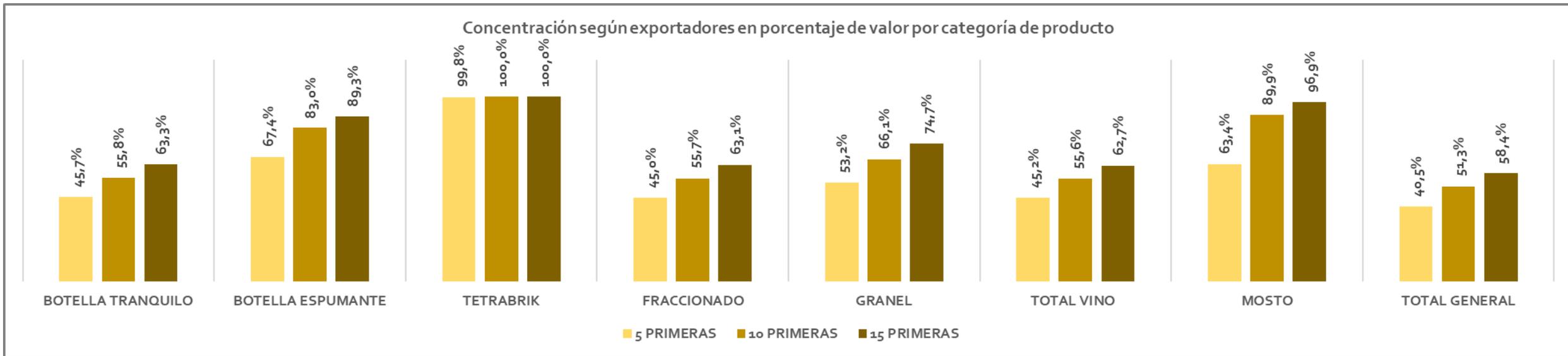
Últimos doce meses cerrados en Julio 2023 – MAT

| CATEGORIA DE PRODUCTO | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/LITRO | | | VOLUMEN (LITROS) | | |
|-------------------------------|------------------------|--------------------|---------------|----------------------------|-------------|--------------|--------------------|--------------------|---------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| BOTELLA TRANQUILO | 792.229.174 | 654.965.460 | -17,3% | 3,66 | 3,77 | 2,8% | 216.172.558 | 173.867.525 | -19,6% |
| BOTELLA ESPUMANTE | 20.636.343 | 19.744.457 | -4,3% | 4,26 | 4,06 | -4,7% | 4.843.075 | 4.861.393 | 0,4% |
| TETRABRIK | 6.112.780 | 3.075.546 | -49,7% | 0,69 | 0,92 | 32,3% | 8.836.425 | 3.360.966 | -62,0% |
| OTROS ENVASES | 161.275 | 1.150.503 | 613,4% | 2,75 | 2,02 | -26,3% | 58.686 | 568.371 | 868,5% |
| TOTAL VINO FRACCIONADO | 819.139.572 | 678.935.966 | -17,1% | 3,56 | 3,72 | 4,3% | 229.910.744 | 182.658.256 | -20,6% |
| GRANEL | 64.276.707 | 48.841.624 | -24,0% | 0,74 | 0,96 | 29,3% | 86.308.409 | 50.704.955 | -41,3% |
| TOTAL VINO | 883.416.279 | 727.777.590 | -17,6% | 2,79 | 3,12 | 11,6% | 316.219.152 | 233.363.210 | -26,2% |
| MOSTO | 117.169.277 | 92.290.104 | -21,2% | 1,39 | 1,76 | 26,3% | 84.144.397 | 52.488.397 | -37,6% |
| TOTAL GENERAL | 1.000.585.557 | 820.067.694 | -18,0% | 2,50 | 2,87 | 14,8% | 400.363.550 | 285.851.607 | -28,6% |



Concentración por categoría de producto

Acumulado anual cerrado en Julio 2023 – MAT

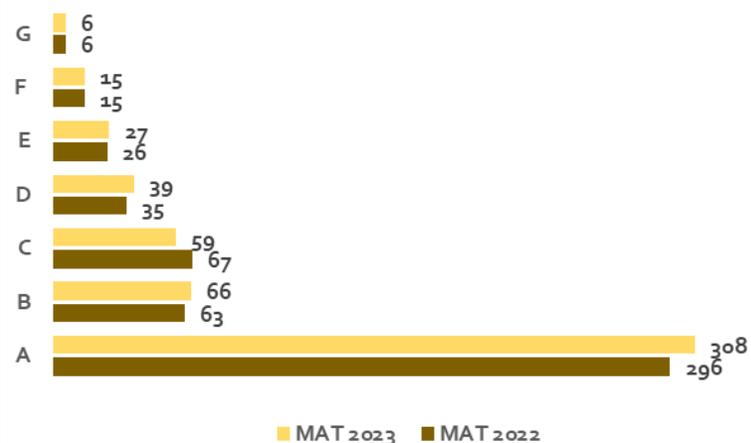


Segmentación de exportadores según volumen para el total de vinos

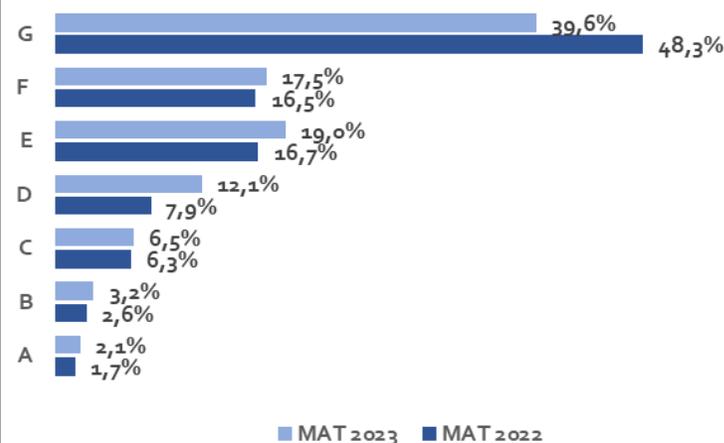
Últimos doce meses cerrados en Julio 2023 – MAT

| FRANJA DE VOLUMEN | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/LITRO | | | VOLUMEN (LITROS) | | |
|--------------------------------------|------------------------|--------------------|---------------|----------------------------|-------------|--------------|--------------------|--------------------|---------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| A MENOS DE 50.000 LITROS | 14.733.431 | 15.110.732 | 2,6% | 4,00 | 4,08 | 2,1% | 3.681.140 | 3.699.278 | 0,5% |
| B ENTRE 50.000 Y 150.000 LITROS | 22.933.958 | 23.057.843 | 0,5% | 3,88 | 4,29 | 10,6% | 5.905.904 | 5.370.344 | -9,1% |
| C ENTRE 150.000 Y 500.000 LITROS | 55.446.576 | 47.493.259 | -14,3% | 3,96 | 3,14 | -20,7% | 13.997.896 | 15.115.430 | 8,0% |
| D ENTRE 500.000 Y 1.250.000 LITROS | 69.762.109 | 88.236.844 | 26,5% | 2,42 | 3,07 | 26,8% | 28.788.753 | 28.713.920 | -0,3% |
| E ENTRE 1.250.000 Y 3.000.000 LITROS | 147.595.700 | 138.336.543 | -6,3% | 2,81 | 3,34 | 18,8% | 52.536.904 | 41.441.979 | -21,1% |
| F ENTRE 3.000.000 Y 9.000.000 LITROS | 145.979.737 | 127.090.314 | -12,9% | 2,88 | 2,77 | -3,6% | 50.750.893 | 45.845.493 | -9,7% |
| G MAS DE 9.000.000 LITROS | 426.964.769 | 288.452.055 | -32,4% | 2,66 | 3,10 | 16,4% | 160.557.663 | 93.176.766 | -42,0% |
| TOTAL VINOS | 883.416.279 | 727.777.590 | -17,6% | 2,79 | 3,12 | 11,6% | 316.219.152 | 233.363.210 | -26,2% |

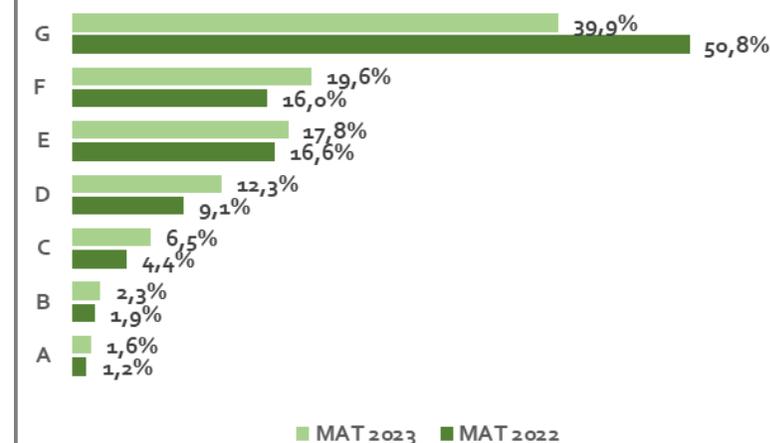
Cantidad de exportadores en franjas de volumen



Share en franjas de valor



Share en franjas de volumen

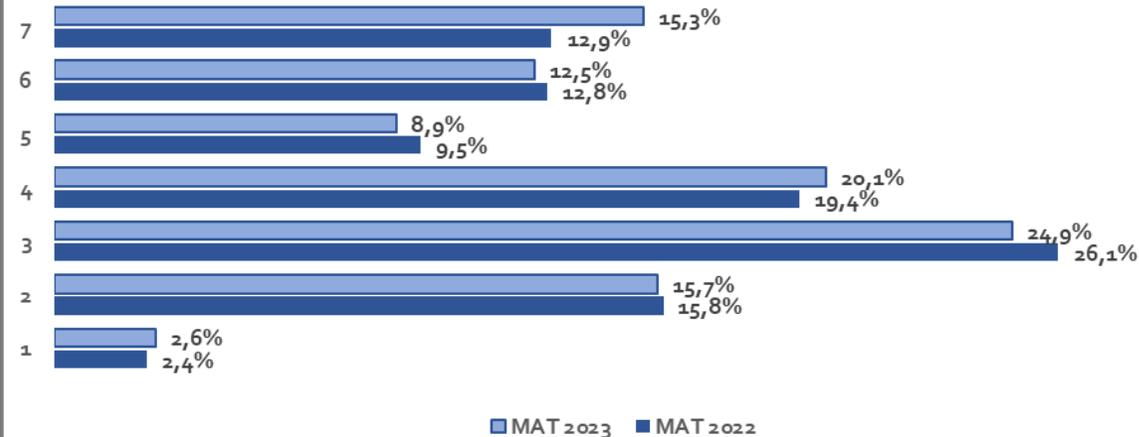


Exportación de vinos fraccionados tranquilos por segmento de precios

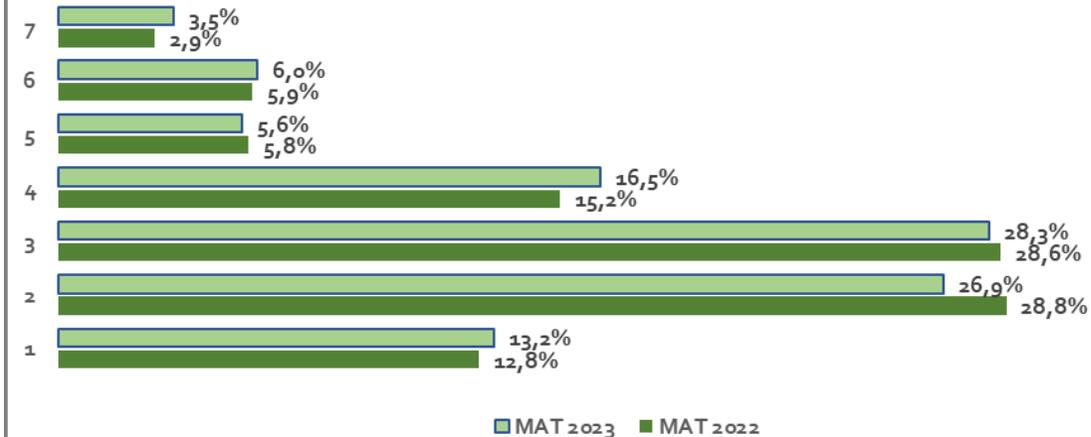
Últimos doce meses cerrados en Julio 2023 – MAT

| FRANJA DE PRECIOS | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (CAJAS) | | |
|--|------------------------|--------------------|---------------|---------------------------|--------------|-------------|-------------------|-------------------|---------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 Menos de 12 U\$S/Caja | 19.214.700 | 17.326.034 | -9,8% | 6,01 | 6,62 | 10,2% | 3.195.863 | 2.615.606 | -18,2% |
| 2 Entre 12/24 U\$S/Caja | 126.484.502 | 103.469.082 | -18,2% | 17,56 | 19,47 | 10,9% | 7.202.458 | 5.313.083 | -26,2% |
| 3 Entre 24/36 U\$S/Caja | 208.448.415 | 164.213.432 | -21,2% | 29,13 | 29,39 | 0,9% | 7.156.790 | 5.587.888 | -21,9% |
| 4 Entre 36/48 U\$S/Caja | 154.663.422 | 132.286.190 | -14,5% | 40,65 | 40,67 | 0,1% | 3.805.193 | 3.252.361 | -14,5% |
| 5 Entre 48/60 U\$S/Caja | 75.977.384 | 58.588.690 | -22,9% | 52,75 | 53,03 | 0,5% | 1.440.348 | 1.104.862 | -23,3% |
| 6 Entre 60/84 U\$S/Caja | 102.451.694 | 82.256.585 | -19,7% | 69,50 | 69,14 | -0,5% | 1.474.101 | 1.189.639 | -19,3% |
| 7 Más de 84 U\$S/Caja | 103.189.632 | 101.051.495 | -2,1% | 140,82 | 146,08 | 3,7% | 732.766 | 691.767 | -5,6% |
| TOTAL VINOS FRACCIONADOS TRANQUILOS | 798.503.229 | 659.191.509 | -17,4% | 31,93 | 33,37 | 4,5% | 25.007.519 | 19.755.207 | -21,0% |

Share en valor en franjas de precios



Share en volumen en franjas de precios

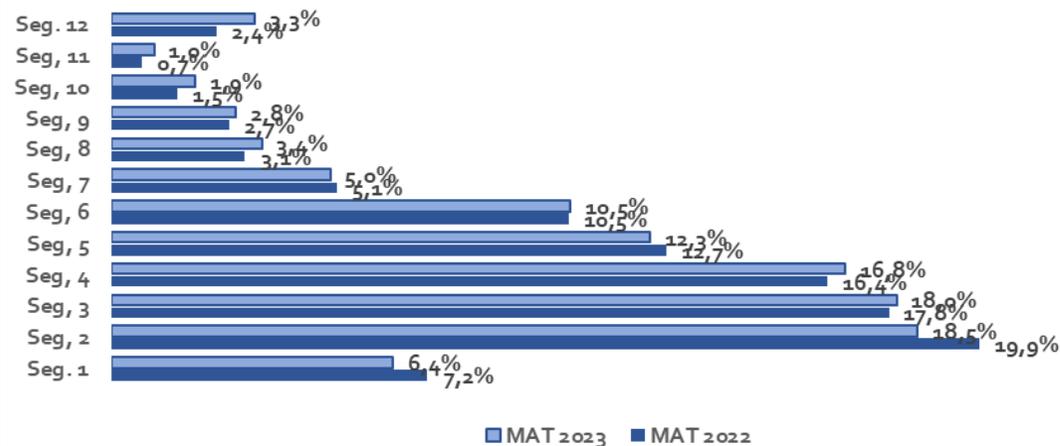


Exportación de vinos embotellados tranquilos por segmento de precios

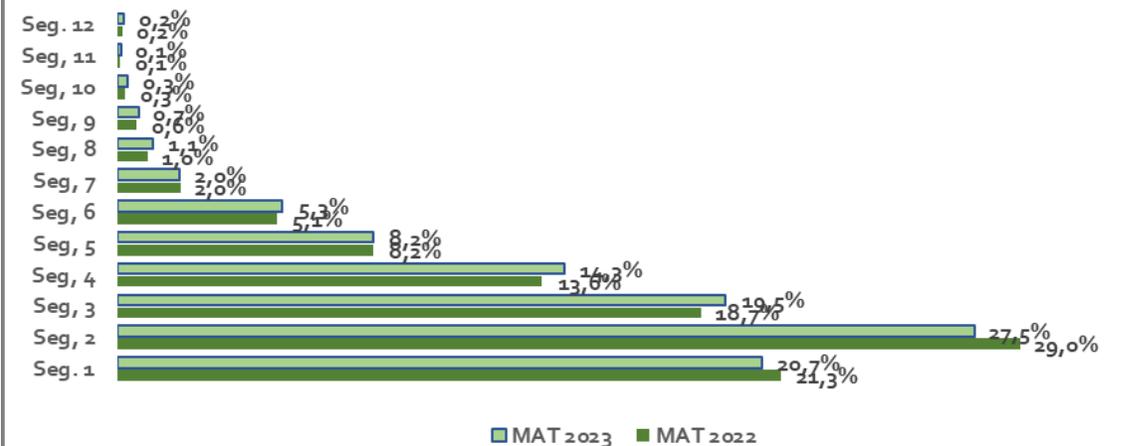
Últimos doce meses cerrados en Julio 2023 – MAT

| FRANJA DE PRECIOS | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (CAJAS) | | |
|-----------------------------------|------------------------|--------------------|---------------|---------------------------|--------------|-------------|-------------------|-------------------|---------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| Seg. 1 - Menos 18 U\$S/Caja | 57.332.934 | 42.131.215 | -26,5% | 11,22 | 10,54 | -6,0% | 5.112.026 | 3.998.387 | -21,8% |
| Seg. 2 - Entre 18/27 U\$S/Caja | 157.484.467 | 120.949.954 | -23,2% | 22,64 | 22,77 | 0,6% | 6.957.302 | 5.312.800 | -23,6% |
| Seg. 3 - Entre 27/36 U\$S/Caja | 141.169.593 | 117.790.636 | -16,6% | 31,38 | 31,25 | -0,4% | 4.498.209 | 3.769.756 | -16,2% |
| Seg. 4 - Entre 36/45 U\$S/Caja | 130.002.412 | 110.083.168 | -15,3% | 39,73 | 39,72 | 0,0% | 3.272.023 | 2.771.535 | -15,3% |
| Seg. 5 - Entre 45/60 U\$S/Caja | 100.604.388 | 80.753.734 | -19,7% | 51,00 | 50,95 | -0,1% | 1.972.821 | 1.584.904 | -19,7% |
| Seg. 6 - Entre 60/78 U\$S/Caja | 82.905.677 | 68.850.131 | -17,0% | 67,38 | 67,33 | -0,1% | 1.230.456 | 1.022.510 | -16,9% |
| Seg. 7 - Entre 78/96 U\$S/Caja | 40.790.845 | 32.807.559 | -19,6% | 84,53 | 85,33 | 0,9% | 482.562 | 384.476 | -20,3% |
| Seg. 8 - Entre 96/120 U\$S/Caja | 24.190.575 | 22.562.230 | -6,7% | 104,14 | 103,68 | -0,4% | 232.299 | 217.607 | -6,3% |
| Seg. 9 - Entre 120/180 U\$S/Caja | 21.255.890 | 18.663.898 | -12,2% | 145,22 | 143,67 | -1,1% | 146.375 | 129.905 | -11,3% |
| Seg. 10 - Entre 180/240 U\$S/Caja | 11.874.625 | 12.540.001 | 5,6% | 197,73 | 199,10 | 0,7% | 60.056 | 62.985 | 4,9% |
| Seg. 11 - Entre 240/360 U\$S/Caja | 5.518.427 | 6.371.451 | 15,5% | 294,72 | 288,17 | -2,2% | 18.724 | 22.110 | 18,1% |
| Seg. 12 - Más de 360 U\$S/Caja | 19.099.340 | 21.461.483 | 12,4% | 525,86 | 515,43 | -2,0% | 36.320 | 41.638 | 14,6% |
| TOTAL VINOS | 792.229.174 | 654.965.460 | -17,3% | 32,98 | 33,90 | 2,8% | 24.019.173 | 19.318.614 | -19,6% |

Share en valor en franjas de precios



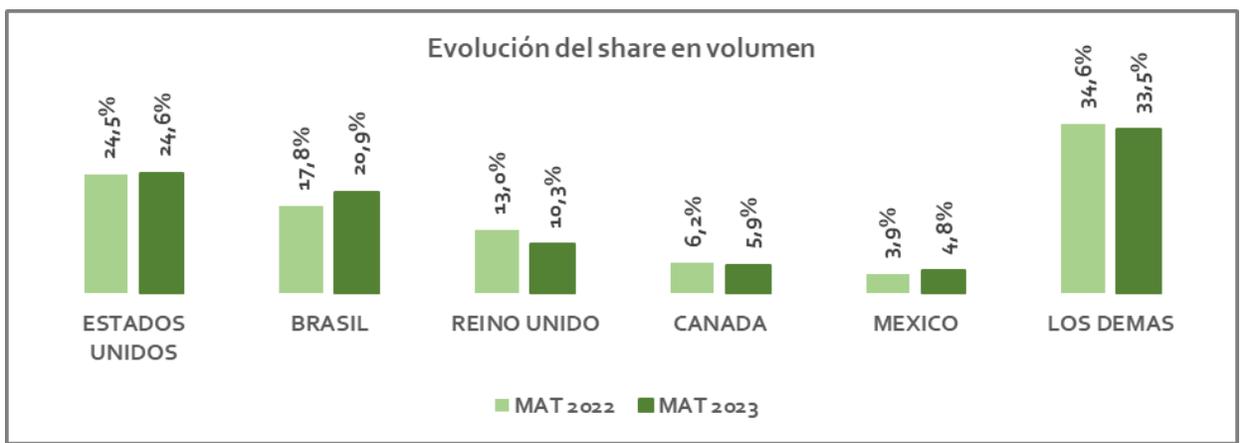
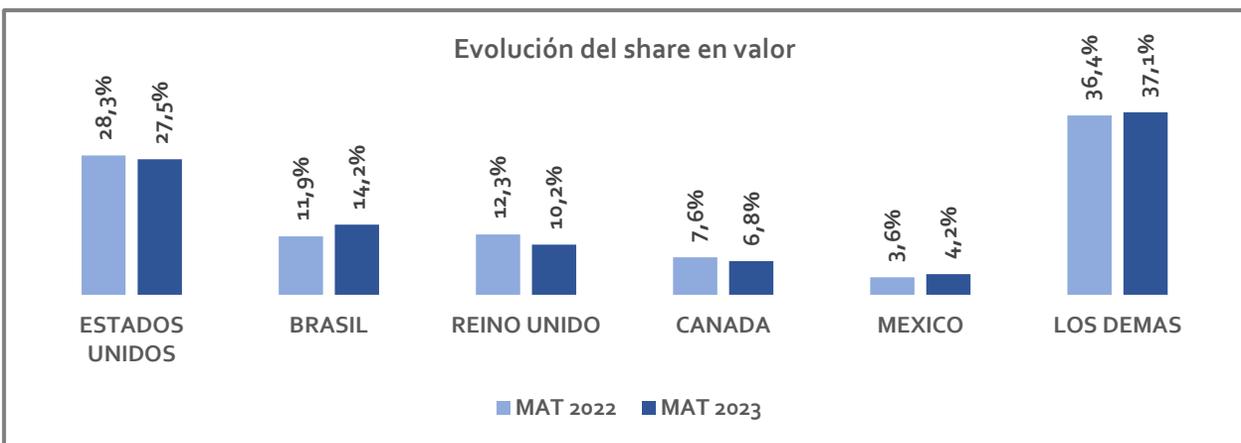
Share en volumen en franjas de precios



Mercados de destino vinos embotellados tranquilos

Últimos doce meses cerrados en Julio 2023 – MAT

| PAIS | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/LITRO | | | VOLUMEN (CAJAS) | | |
|---|------------------------|--------------------|---------------|----------------------------|--------------|-------------|-------------------|-------------------|---------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 ESTADOS UNIDOS | 224.167.455 | 180.334.402 | -19,6% | 38,13 | 37,90 | -0,6% | 5.878.780 | 4.757.681 | -19,1% |
| 2 BRASIL | 94.061.161 | 93.201.264 | -0,9% | 21,99 | 23,13 | 5,2% | 4.278.019 | 4.029.161 | -5,8% |
| 3 REINO UNIDO | 97.243.296 | 66.871.274 | -31,2% | 31,15 | 33,73 | 8,3% | 3.121.325 | 1.982.466 | -36,5% |
| 4 CANADA | 60.028.440 | 44.537.938 | -25,8% | 40,35 | 39,27 | -2,7% | 1.487.706 | 1.134.156 | -23,8% |
| 5 MEXICO | 28.138.305 | 27.246.508 | -3,2% | 30,04 | 29,15 | -3,0% | 936.591 | 934.655 | -0,2% |
| 6 PAISES BAJOS | 25.431.332 | 20.745.682 | -18,4% | 32,59 | 33,07 | 1,5% | 780.234 | 627.320 | -19,6% |
| 7 CHINA | 19.879.709 | 15.724.657 | -20,9% | 36,82 | 46,78 | 27,0% | 539.900 | 336.152 | -37,7% |
| 8 FRANCIA | 13.225.103 | 14.341.679 | 8,4% | 67,59 | 84,24 | 24,6% | 195.679 | 170.243 | -13,0% |
| 9 PERU | 16.240.020 | 13.149.550 | -19,0% | 38,77 | 40,95 | 5,6% | 418.919 | 321.087 | -23,4% |
| 10 COLOMBIA | 15.938.443 | 12.952.883 | -18,7% | 28,82 | 31,64 | 9,8% | 552.969 | 409.448 | -26,0% |
| 11 SUIZA | 12.705.775 | 10.420.577 | -18,0% | 48,45 | 41,52 | -14,3% | 262.221 | 250.996 | -4,3% |
| 12 ALEMANIA | 11.056.989 | 9.282.035 | -16,1% | 39,39 | 39,61 | 0,5% | 280.676 | 234.365 | -16,5% |
| 13 COREA REPUBLICANA | 10.826.074 | 9.273.121 | -14,3% | 53,09 | 67,50 | 27,1% | 203.919 | 137.389 | -32,6% |
| 14 PARAGUAY | 10.704.345 | 8.638.614 | -19,3% | 32,73 | 39,68 | 21,2% | 327.095 | 217.712 | -33,4% |
| 15 URUGUAY | 9.769.849 | 7.725.718 | -20,9% | 29,56 | 30,53 | 3,3% | 330.461 | 253.031 | -23,4% |
| 16 LETONIA | 3.426.266 | 7.340.938 | 114,3% | 29,51 | 22,58 | -23,5% | 116.125 | 325.086 | 179,9% |
| 17 IRLANDA | 10.547.409 | 7.109.300 | -32,6% | 29,11 | 28,71 | -1,4% | 362.282 | 247.633 | -31,6% |
| 18 DINAMARCA | 7.163.513 | 6.438.504 | -10,1% | 40,63 | 43,90 | 8,1% | 176.318 | 146.665 | -16,8% |
| 19 JAPON | 7.398.488 | 6.334.309 | -14,4% | 38,96 | 38,46 | -1,3% | 189.905 | 164.685 | -13,3% |
| 20 BELGICA | 7.156.923 | 5.153.337 | -28,0% | 36,39 | 33,92 | -6,8% | 196.688 | 151.909 | -22,8% |
| LOS DEMAS | 107.120.282 | 88.143.170 | -17,7% | 31,66 | 35,44 | 12,0% | 3.383.359 | 2.486.775 | -26,5% |
| TOTAL VINO EMBOTELLADO TRANQUILO | 792.229.174 | 654.965.460 | -17,3% | 32,98 | 33,90 | 2,8% | 24.019.173 | 19.318.614 | -19,6% |

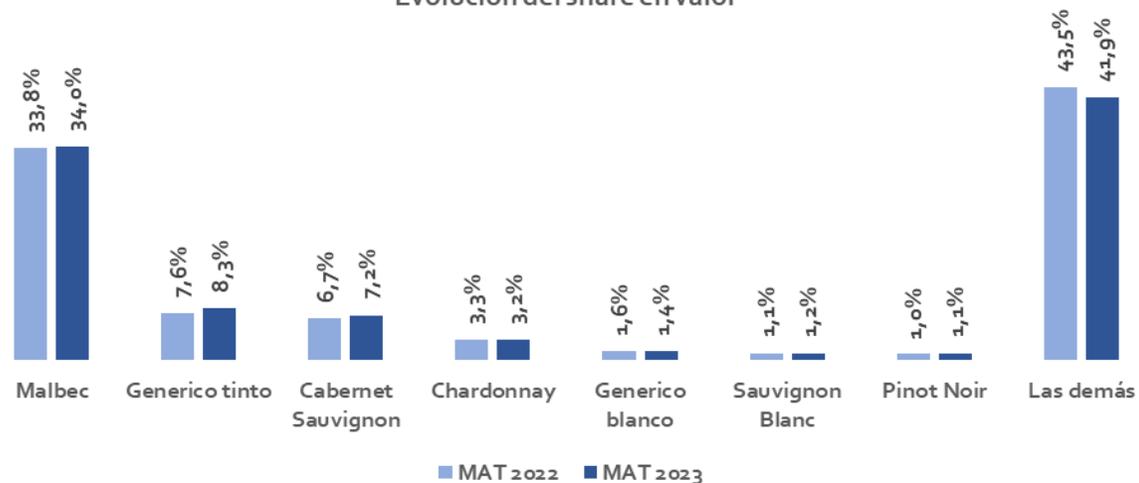


Principales varietales de vinos embotellados tranquilos

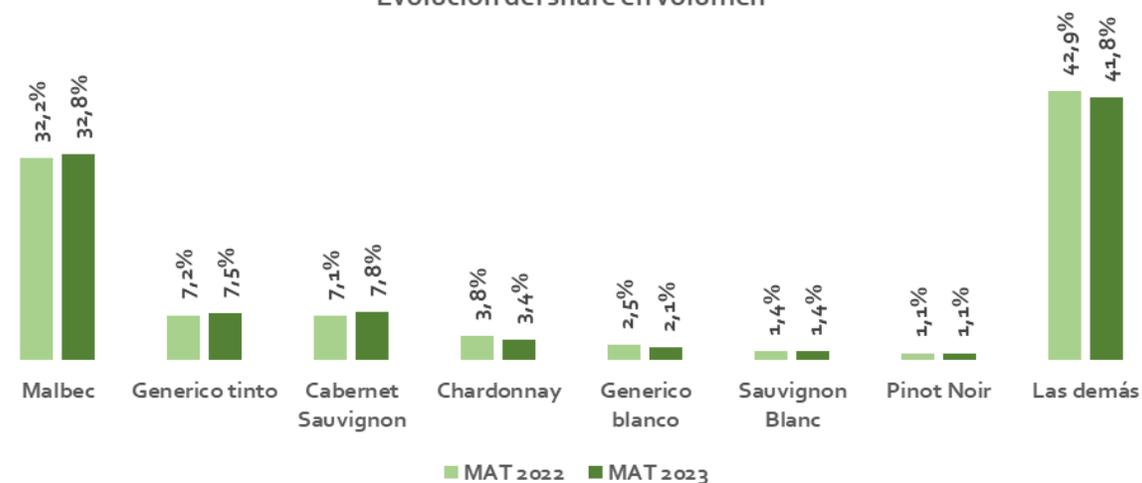
Últimos doce meses cerrados en Julio 2023 – MAT

| VARIETAL | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (CAJAS) | | |
|---|------------------------|--------------------|---------------|---------------------------|--------------|-------------|-------------------|-------------------|---------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 Malbec | 268.138.774 | 222.809.637 | -16,9% | 34,64 | 35,14 | 1,5% | 7.741.582 | 6.340.086 | -18,1% |
| 2 Generico tinto | 59.900.042 | 54.291.295 | -9,4% | 34,72 | 37,49 | 8,0% | 1.725.212 | 1.448.076 | -16,1% |
| 3 Cabernet Sauvignon | 52.983.005 | 47.197.144 | -10,9% | 31,09 | 31,37 | 0,9% | 1.704.139 | 1.504.498 | -11,7% |
| 4 Chardonnay | 26.262.131 | 21.034.264 | -19,9% | 28,43 | 32,37 | 13,9% | 923.620 | 649.756 | -29,7% |
| 5 Generico blanco | 12.450.342 | 9.471.043 | -23,9% | 21,15 | 23,75 | 12,2% | 588.548 | 398.855 | -32,2% |
| 6 Sauvignon Blanc | 8.802.823 | 7.575.773 | -13,9% | 25,41 | 27,17 | 7,0% | 346.477 | 278.795 | -19,5% |
| 7 Pinot Noir | 7.898.295 | 7.276.500 | -7,9% | 29,70 | 33,37 | 12,3% | 265.912 | 218.056 | -18,0% |
| 8 Torrontes | 6.948.550 | 6.212.739 | -10,6% | 28,26 | 26,39 | -6,6% | 245.910 | 235.446 | -4,3% |
| 9 Merlot | 4.531.846 | 4.648.217 | 2,6% | 25,45 | 26,71 | 5,0% | 178.050 | 173.997 | -2,3% |
| Otros sin descripción | 344.313.367 | 274.448.848 | -20,3% | 33,43 | 34,00 | 1,7% | 10.299.722 | 8.071.049 | -21,6% |
| TOTAL VINO EMBOTELLADO TRANQUILO | 792.229.174 | 654.965.460 | -17,3% | 32,98 | 33,90 | 2,8% | 24.019.173 | 19.318.614 | -19,6% |

Evolución del share en valor



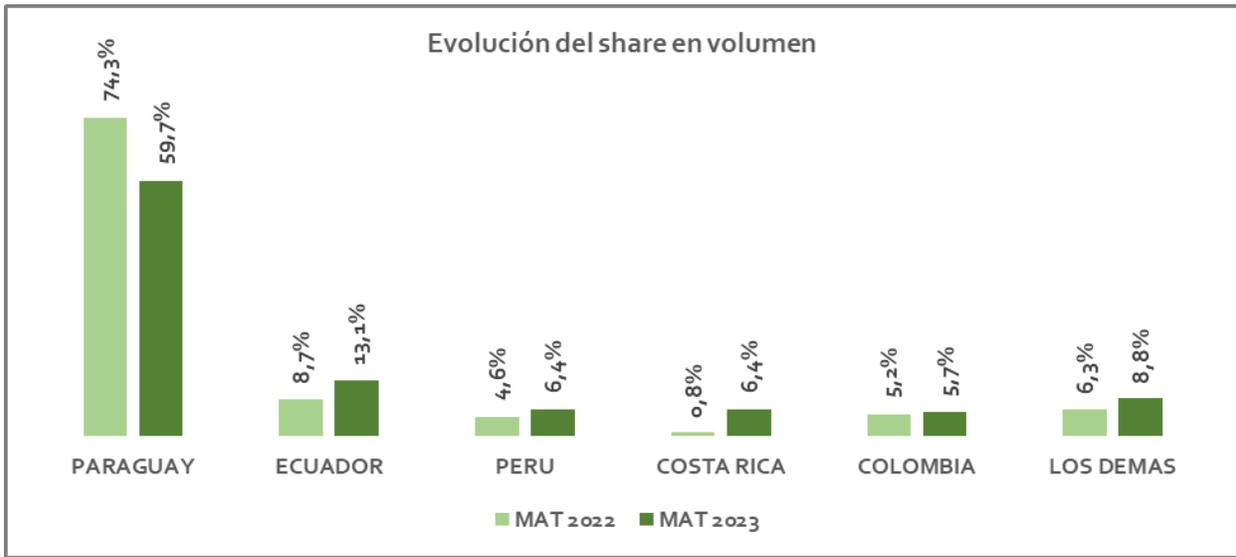
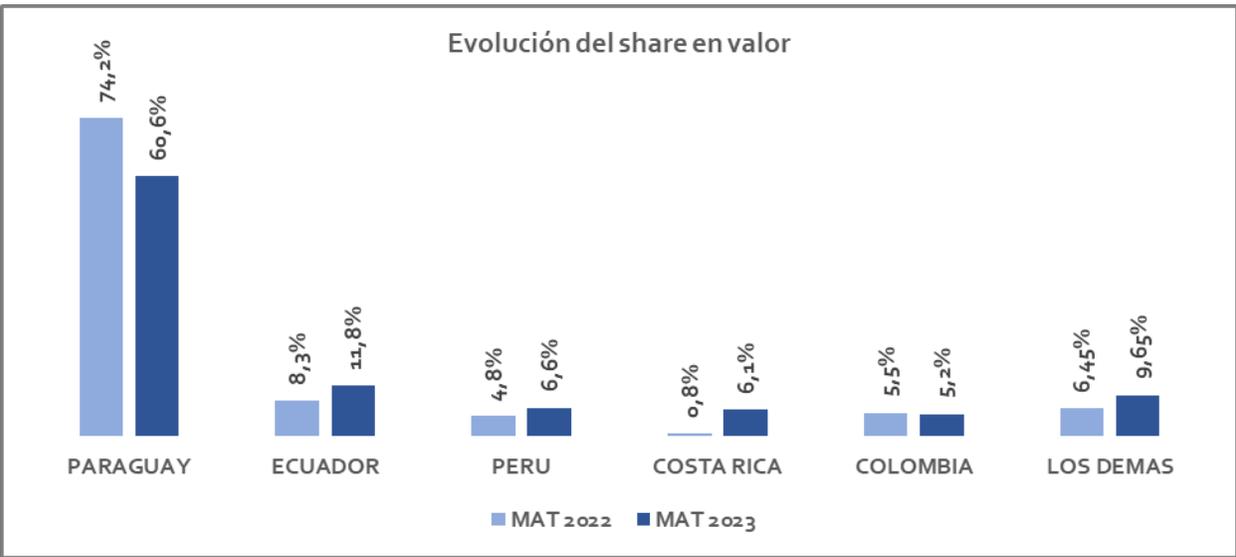
Evolución del share en volumen



Mercados de destino vinos envasados en tetrabrik

Últimos doce meses cerrados en Julio 2023 – MAT

| PAIS | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/LITRO | | | VOLUMEN (LITROS) | | |
|--------------------------------|------------------------|------------------|---------------|----------------------------|-------------|--------------|------------------|------------------|---------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 PARAGUAY | 4.533.534 | 1.862.869 | -58,9% | 0,69 | 0,93 | 34,6% | 6.568.795 | 2.004.851 | -69,5% |
| 2 ECUADOR | 507.074 | 364.267 | -28,2% | 0,66 | 0,83 | 25,6% | 769.770 | 440.428 | -42,8% |
| 3 PERU | 292.215 | 203.635 | -30,3% | 0,72 | 0,95 | 31,9% | 406.193 | 214.568 | -47,2% |
| 4 COSTA RICA | 50.312 | 188.995 | 275,6% | 0,68 | 0,88 | 28,7% | 73.546 | 214.658 | 191,9% |
| 5 COLOMBIA | 335.377 | 159.085 | -52,6% | 0,72 | 0,84 | 15,6% | 463.303 | 190.136 | -59,0% |
| 6 URUGUAY | 81.864 | 79.900 | -2,4% | 0,72 | 0,87 | 20,3% | 113.420 | 92.045 | -18,8% |
| 7 VENEZUELA | 44.047 | 73.292 | 66,4% | 0,66 | 0,83 | 24,8% | 66.326 | 88.435 | 33,3% |
| LOS DEMAS | 268.358 | 143.505 | -46,5% | 0,72 | 1,24 | 73,1% | 375.071 | 115.846 | -69,1% |
| TOTAL VINO EN TETRABRIK | 6.112.780 | 3.075.546 | -49,7% | 0,69 | 0,92 | 32,3% | 8.836.425 | 3.360.966 | -62,0% |

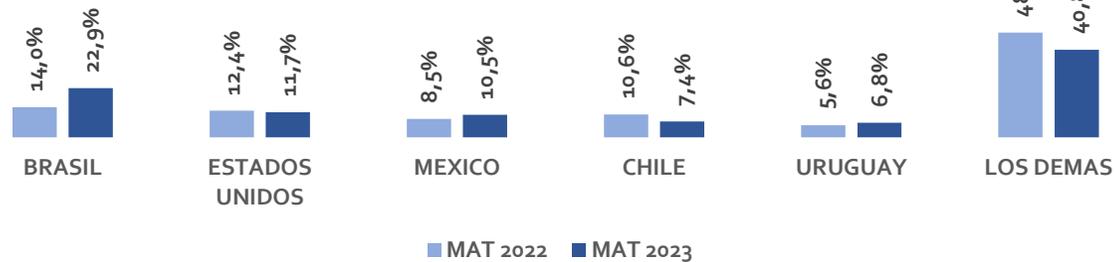


Mercados de destino y tipo de vinos espumantes

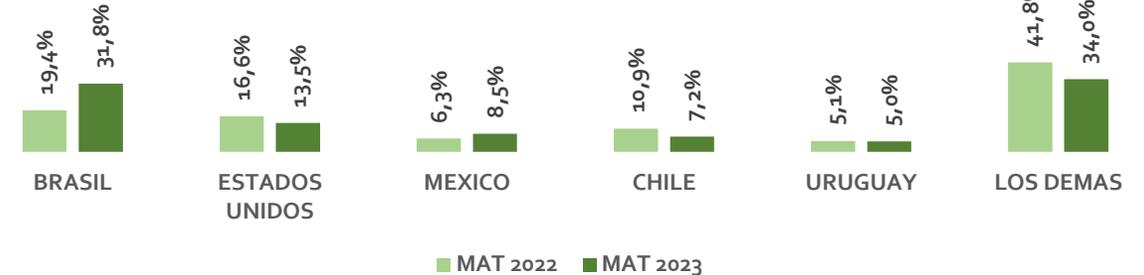
Últimos doce meses cerrados en Julio 2023 – MAT

| PAIS | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (CAJAS) | | |
|-----------------------------|------------------------|-------------------|--------------|---------------------------|-------------|--------------|-----------------|----------------|-------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 BRASIL | 2.894.789 | 4.520.531 | 56,2% | 27,8 | 26,3 | -5,3% | 104.247 | 171.834 | 64,8% |
| 2 ESTADOS UNIDOS | 2.566.517 | 2.309.071 | -10,0% | 28,8 | 31,6 | 9,9% | 89.237 | 73.053 | -18,1% |
| 3 MEXICO | 1.763.533 | 2.069.667 | 17,4% | 52,3 | 45,1 | -13,8% | 33.693 | 45.864 | 36,1% |
| 4 CHILE | 2.187.003 | 1.452.408 | -33,6% | 37,3 | 37,4 | 0,2% | 58.583 | 38.816 | -33,7% |
| 5 URUGUAY | 1.148.593 | 1.345.792 | 17,2% | 42,1 | 50,1 | 19,2% | 27.313 | 26.851 | -1,7% |
| 6 FRANCIA | 1.200.385 | 1.327.424 | 10,6% | 49,8 | 40,7 | -18,2% | 24.127 | 32.600 | 35,1% |
| 7 COLOMBIA | 498.772 | 976.156 | 95,7% | 62,9 | 64,9 | 3,1% | 7.927 | 15.048 | 89,8% |
| 8 PARAGUAY | 1.450.109 | 951.358 | -34,4% | 52,3 | 45,8 | -12,5% | 27.706 | 20.762 | -25,1% |
| 9 ECUADOR | 1.506.946 | 760.297 | -49,5% | 30,0 | 34,7 | 15,8% | 50.241 | 21.889 | -56,4% |
| 10 PERU | 658.475 | 484.264 | -26,5% | 43,8 | 29,1 | -33,5% | 15.050 | 16.653 | 10,7% |
| LOS DEMAS | 4.761.221 | 3.547.489 | -25,5% | 47,6 | 46,2 | -3,0% | 99.996 | 76.786 | -23,2% |
| TOTAL VINO ESPUMANTE | 20.636.343 | 19.744.457 | -4,3% | 38,3 | 36,6 | -4,7% | 538.119 | 540.155 | 0,4% |

Evolución del share en valor



Evolución del share en volumen



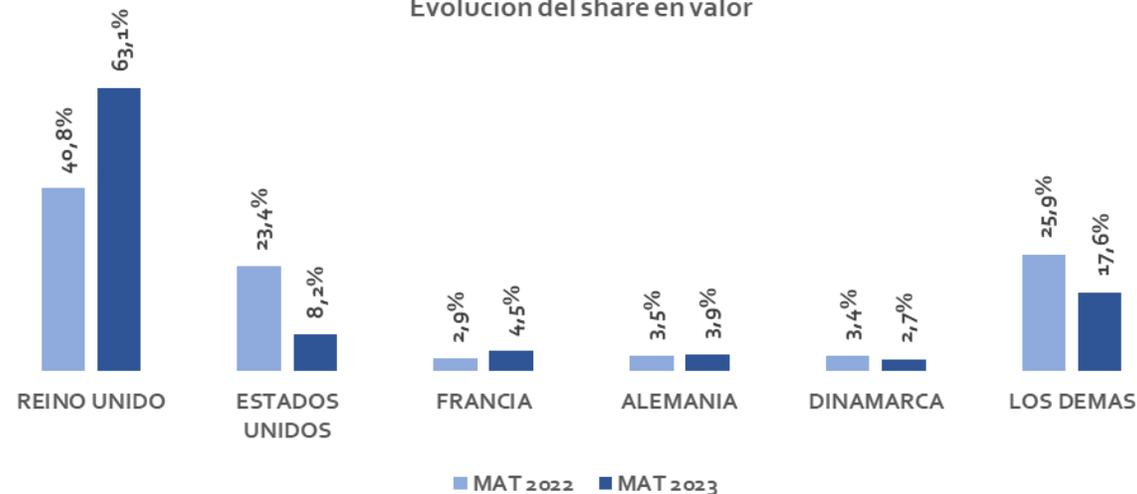
| TIPO | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/LITRO | | | VOLUMEN (CAJAS) | | |
|------------------------------------|------------------------|-------------------|--------------|----------------------------|-------------|--------------|-----------------|----------------|-------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| Brut | 6.088.512 | 3.624.125 | -40,5% | 51,7 | 43,3 | -16,3% | 117.828 | 83.793 | -28,9% |
| Extra Brut | 3.860.583 | 1.268.665 | -67,1% | 37,1 | 40,8 | 9,9% | 104.087 | 31.113 | -70,1% |
| Demi Sec | 1.775.740 | 844.825 | -52,4% | 55,3 | 47,7 | -13,6% | 32.121 | 17.697 | -44,9% |
| Dulce | 494.903 | 708.420 | 43,1% | 29,8 | 28,5 | -4,4% | 16.591 | 24.845 | 49,7% |
| SIN DESCRIPCIÓN + OTRAS VARIEDADES | 8.416.605 | 13.298.422 | 58,0% | 31,5 | 34,7 | 10,4% | 267.492 | 382.708 | 43,1% |
| TOTAL VINO ESPUMANTE | 20.636.343 | 19.744.457 | -4,3% | 38,3 | 36,6 | -4,7% | 538.119 | 540.155 | 0,4% |

Mercados de destino vinos a granel

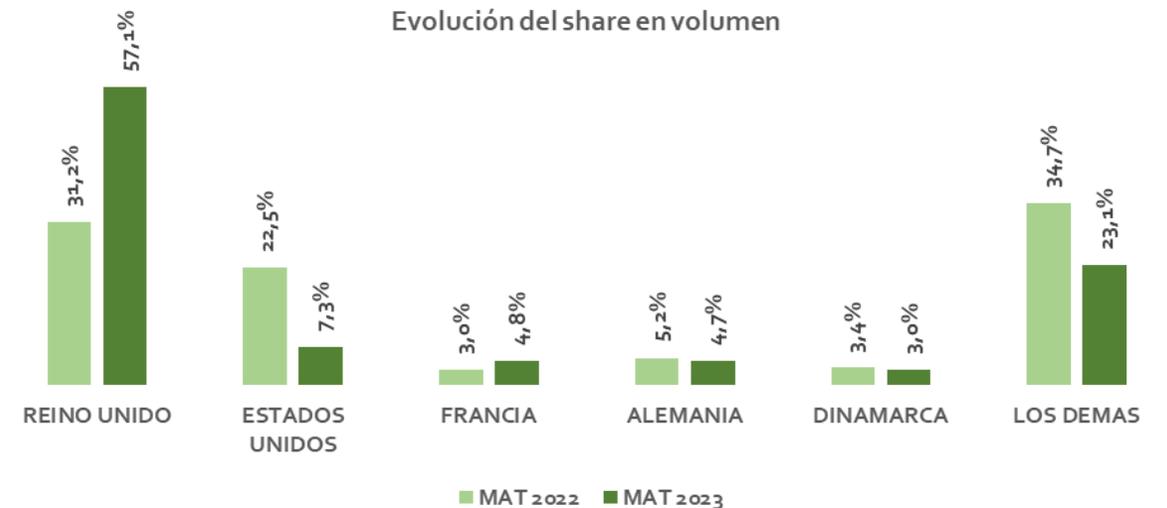
Últimos doce meses cerrados en Julio 2023 – MAT

| PAIS | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/LITRO | | | VOLUMEN (LITROS) | | |
|--------------------------|------------------------|-------------------|---------------|----------------------------|-------------|--------------|-------------------|-------------------|---------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| REINO UNIDO | 26.244.250 | 30.836.885 | 17,5% | 0,98 | 1,07 | 9,2% | 26.904.007 | 28.936.380 | 7,6% |
| ESTADOS UNIDOS | 15.025.199 | 3.989.755 | -73,4% | 0,77 | 1,08 | 39,3% | 19.434.862 | 3.704.609 | -80,9% |
| FRANCIA | 1.886.561 | 2.209.333 | 17,1% | 0,72 | 0,91 | 25,7% | 2.612.466 | 2.433.185 | -6,9% |
| ALEMANIA | 2.236.183 | 1.886.535 | -15,6% | 0,50 | 0,79 | 57,1% | 4.463.051 | 2.396.303 | -46,3% |
| DINAMARCA | 2.208.632 | 1.306.411 | -40,8% | 0,76 | 0,85 | 12,4% | 2.912.100 | 1.532.336 | -47,4% |
| SUECIA | 1.862.723 | 1.183.147 | -36,5% | 0,89 | 1,03 | 14,9% | 2.082.797 | 1.151.486 | -44,7% |
| CHINA | 3.588.302 | 1.180.292 | -67,1% | 0,46 | 0,36 | -22,9% | 7.722.464 | 3.292.843 | -57,4% |
| JAPON | 494.102 | 1.061.847 | 114,9% | 1,08 | 1,29 | 20,3% | 459.615 | 820.904 | 78,6% |
| PERU | 1.086.917 | 873.504 | -19,6% | 0,44 | 0,80 | 82,4% | 2.474.404 | 1.090.457 | -55,9% |
| CANADA | 2.412.533 | 745.932 | -69,1% | 0,52 | 0,79 | 53,6% | 4.667.197 | 939.250 | -79,9% |
| LOS DEMAS | 7.231.304 | 3.567.983 | -50,7% | 0,58 | 0,81 | 40,8% | 12.575.446 | 4.407.201 | -65,0% |
| TOTAL VINO GRANEL | 64.276.707 | 48.841.624 | -24,0% | 0,74 | 0,96 | 29,3% | 86.308.409 | 50.704.955 | -41,3% |

Evolución del share en valor



Evolución del share en volumen

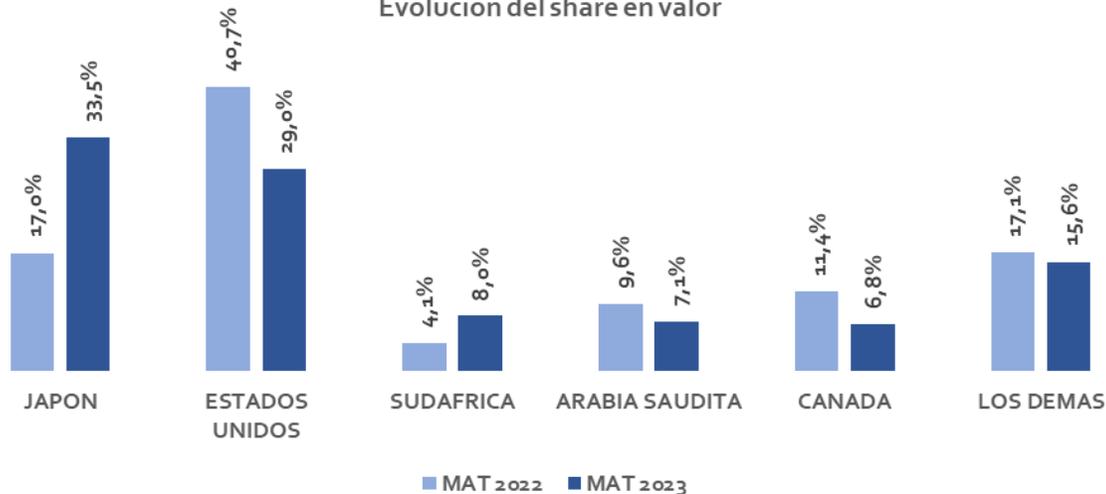


Mercados de destino de mosto

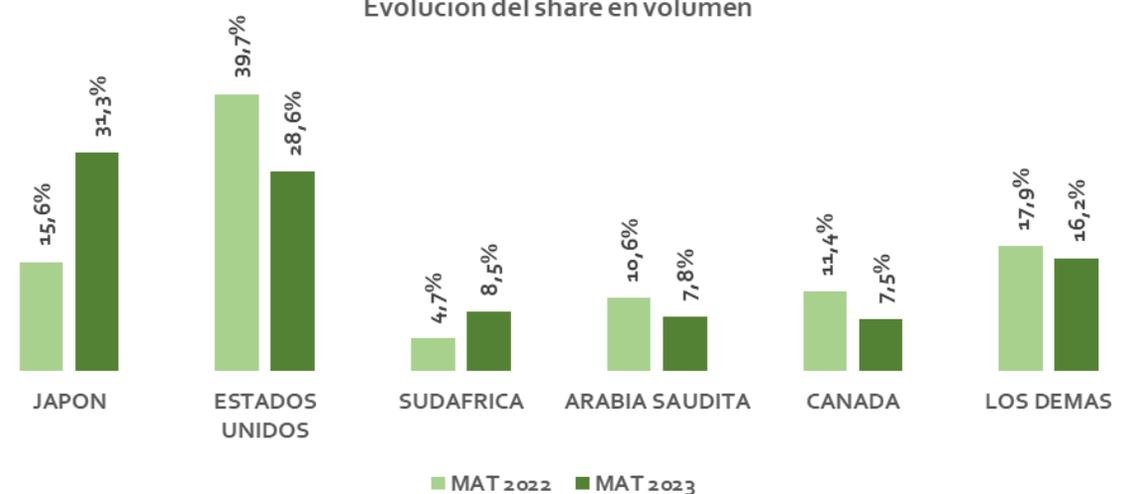
Últimos doce meses cerrados en Julio 2023 – MAT

| PAIS | FACTURACIÓN FOB (U\$S) | | | PRECIO PROMEDIO U\$S/TONELADA | | | VOLUMEN (TONELADAS) | | |
|--------------------|------------------------|-------------------|---------------|-------------------------------|--------------|--------------|---------------------|---------------|---------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 JAPON | 19.880.386 | 30.906.764 | 55,5% | 1.511 | 1.881 | 24,5% | 13.159 | 16.435 | 24,9% |
| 2 ESTADOS UNIDOS | 47.746.375 | 26.724.971 | -44,0% | 1.428 | 1.779 | 24,6% | 33.434 | 15.019 | -55,1% |
| 3 SUDAFRICA | 4.846.275 | 7.398.422 | 52,7% | 1.222 | 1.652 | 35,2% | 3.965 | 4.477 | 12,9% |
| 4 ARABIA SAUDITA | 11.264.812 | 6.559.455 | -41,8% | 1.267 | 1.595 | 25,9% | 8.892 | 4.112 | -53,8% |
| 5 CANADA | 13.386.645 | 6.279.654 | -53,1% | 1.391 | 1.601 | 15,1% | 9.623 | 3.922 | -59,2% |
| 6 CHINA | 3.305.545 | 2.892.655 | -12,5% | 1.529 | 1.883 | 23,2% | 2.162 | 1.536 | -28,9% |
| 7 CHILE | 2.824.160 | 2.435.650 | -13,8% | 1.329 | 1.911 | 43,8% | 2.124 | 1.275 | -40,0% |
| 8 PERU | 1.960.304 | 1.856.884 | -5,3% | 1.215 | 1.421 | 17,0% | 1.614 | 1.306 | -19,1% |
| 9 THAILANDIA | 1.241.282 | 1.627.050 | 31,1% | 1.141 | 1.737 | 52,1% | 1.087 | 937 | -13,8% |
| 10 JAMAICA | 678.810 | 1.605.334 | 136,5% | 1.439 | 1.438 | -0,1% | 472 | 1.117 | 136,8% |
| LOS DEMAS | 10.034.683 | 4.003.264 | -60,1% | 1.402 | 1.702 | 21,4% | 7.155 | 2.352 | -67,1% |
| TOTAL MOSTO | 117.169.277 | 92.290.104 | -21,2% | 1.392 | 1.758 | 26,3% | 84.144 | 52.488 | -37,6% |

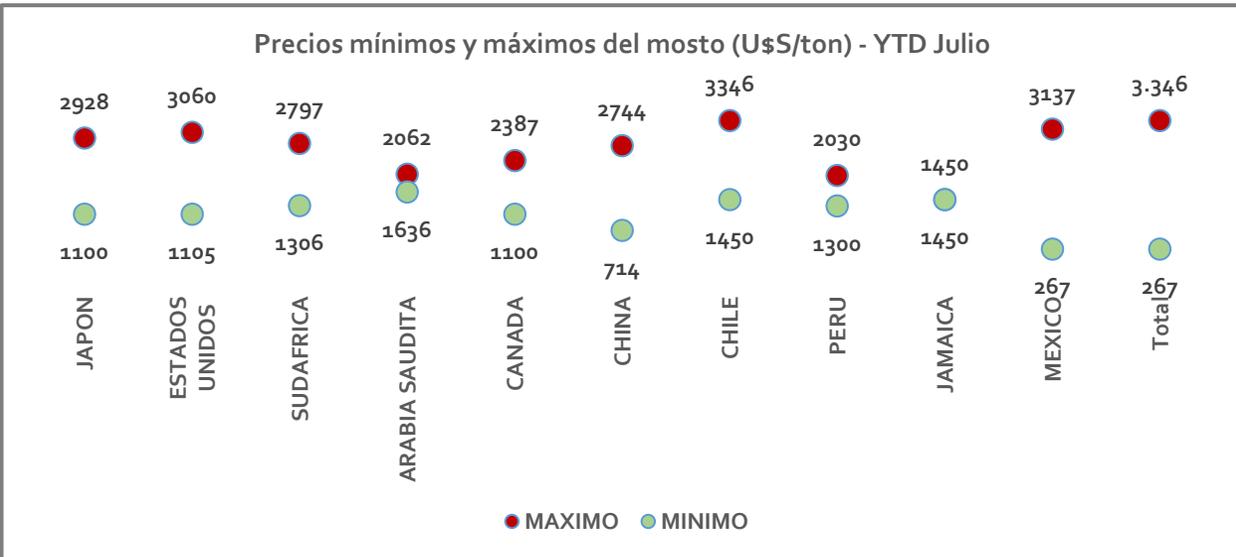
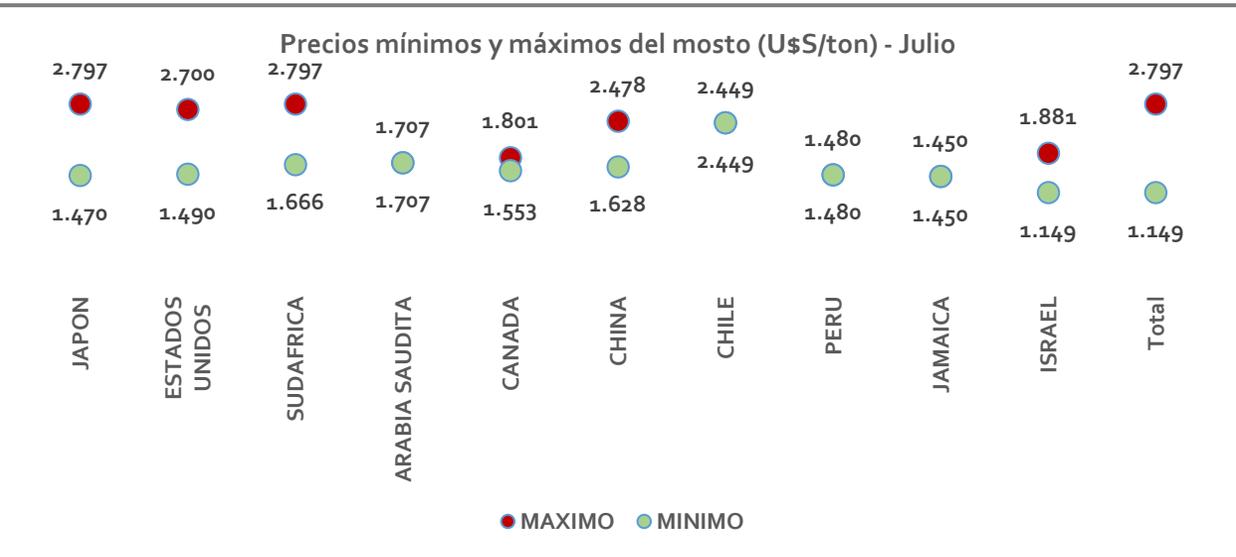
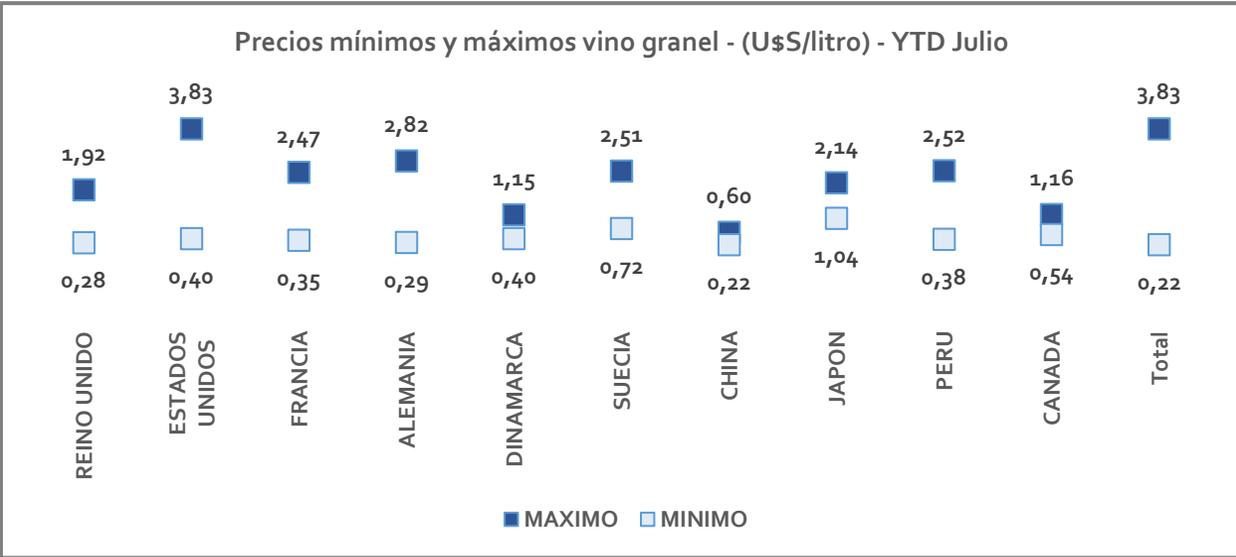
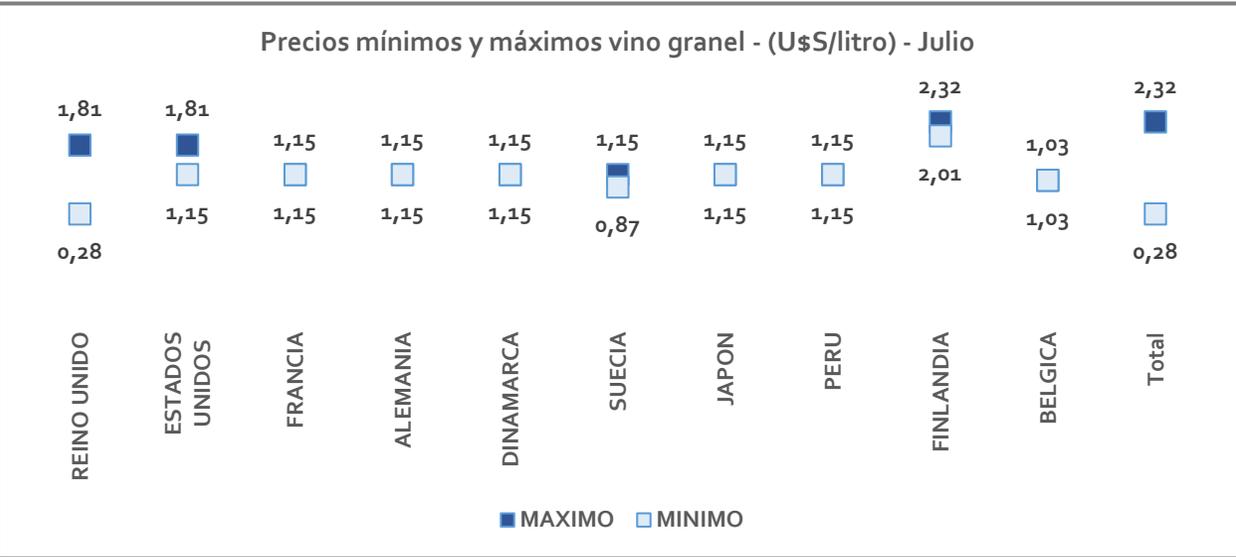
Evolución del share en valor



Evolución del share en volumen



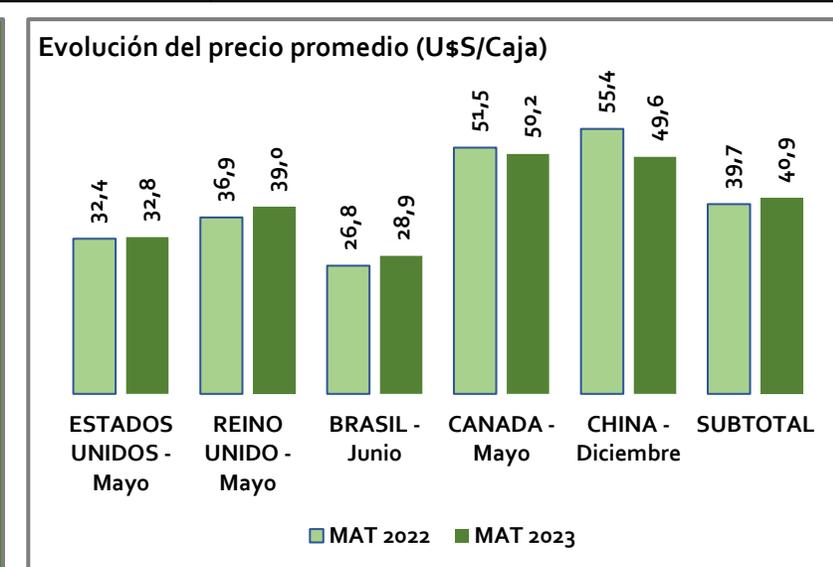
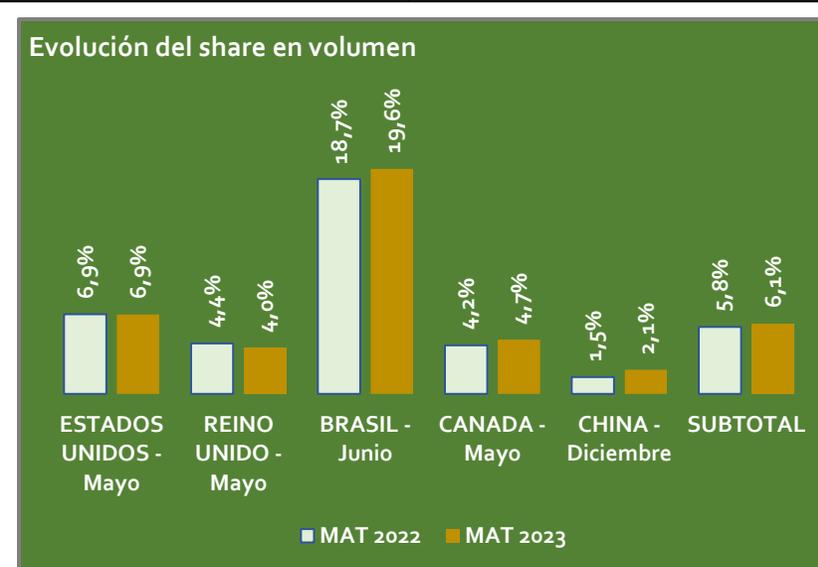
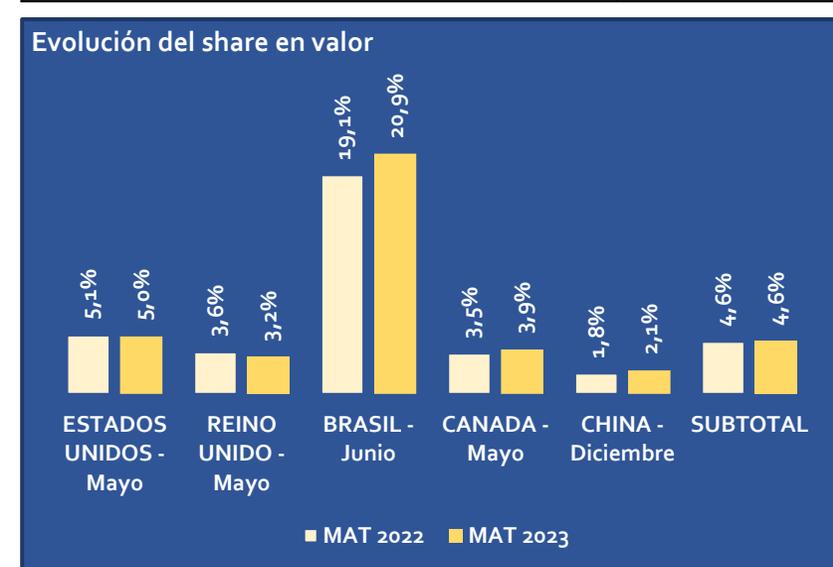
Precios mínimo y máximo para vino a granel y mosto por principales destinos



Importación vino fraccionado tranquilo argentino principales países

Últimos doce meses cerrados desde Diciembre 2022 a Junio 2023 – MAT

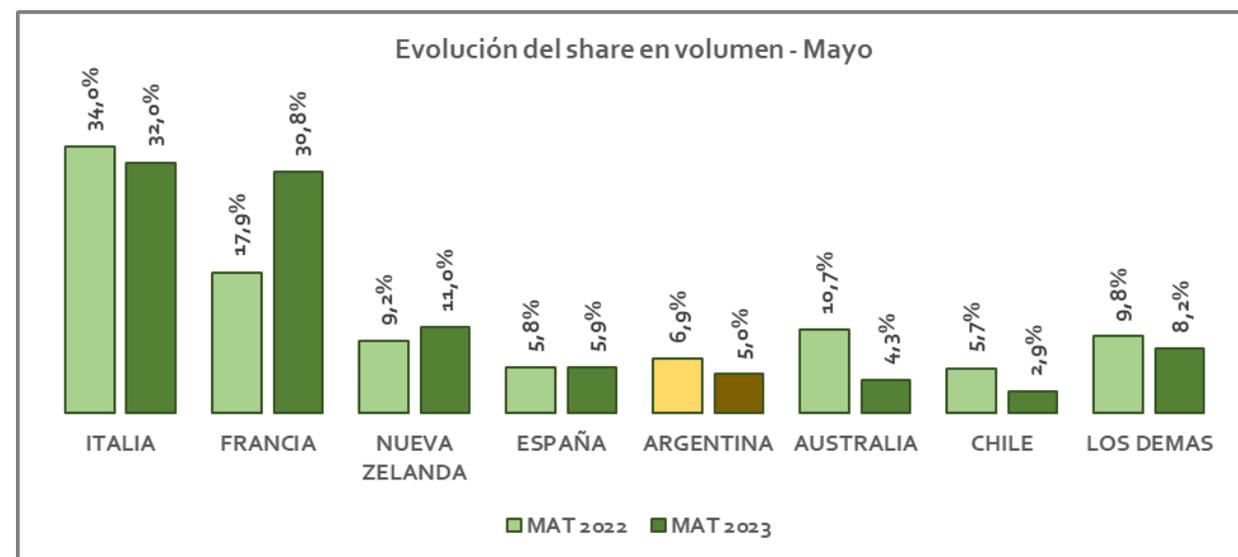
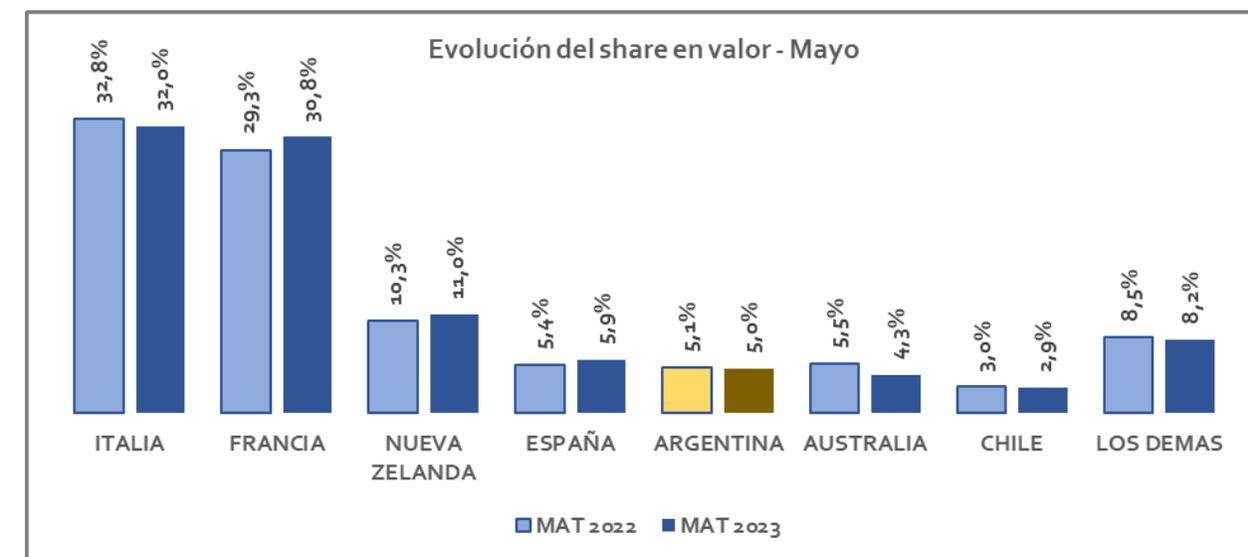
| PAIS IMPORTADOR | IMPORTACION CIF (MM U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (MM CAJAS) | | |
|-----------------------|---------------------------|--------------|--------------|---------------------------|-------------|-------------|--------------------|--------------|-------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| ESTADOS UNIDOS - Mayo | 263,5 | 267,3 | -19,2% | 32,4 | 32,8 | 1,1% | 5,71 | 5,67 | -20,0% |
| REINO UNIDO - Mayo | 116,1 | 97,1 | 30,0% | 36,9 | 39,0 | 5,8% | 3,43 | 2,76 | 6,2% |
| BRASIL - Junio | 82,9 | 89,3 | 1,9% | 26,8 | 28,9 | 7,7% | 3,09 | 3,09 | -1,9% |
| CANADA - Mayo | 69,8 | 69,2 | 9,5% | 51,5 | 50,2 | -2,6% | 1,36 | 1,38 | 8,5% |
| CHINA - Diciembre | 25,7 | 25,1 | -2,2% | 55,4 | 49,6 | -10,6% | 0,46 | 0,51 | 9,3% |
| SUBTOTAL | 558,0 | 548,0 | 19,9% | 39,7 | 40,9 | 1,4% | 14,05 | 13,40 | 2,2% |



Principales orígenes vino fraccionado tranquilo en Estados Unidos

Últimos doce meses cerrados en Mayo 2023 – MAT

| IMPORTADORES | | IMPORTACION CIF (MM U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (MM CAJAS) | | |
|---|------------------|---------------------------|----------------|--------------|---------------------------|-------------|-------------|--------------------|--------------|--------------|
| | | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 | ITALIA | 1.696,7 | 1.708,4 | 0,7% | 60,7 | 63,5 | 4,7% | 27,97 | 26,90 | -3,8% |
| 2 | FRANCIA | 1.513,1 | 1.645,6 | 8,8% | 102,7 | 104,5 | 1,7% | 14,73 | 15,75 | 6,9% |
| 3 | NUEVA ZELANDA | 530,8 | 587,5 | 10,7% | 70,3 | 66,8 | -4,9% | 7,55 | 8,79 | 16,4% |
| 4 | ESPAÑA | 280,5 | 315,3 | 12,4% | 58,3 | 60,2 | 3,2% | 4,81 | 5,24 | 8,9% |
| 5 | ARGENTINA | 263,5 | 267,3 | 1,4% | 46,1 | 47,2 | 2,2% | 5,71 | 5,67 | -0,8% |
| 6 | AUSTRALIA | 285,4 | 230,7 | -19,2% | 32,4 | 32,8 | 1,1% | 8,80 | 7,04 | -20,0% |
| 7 | CHILE | 154,3 | 152,6 | -1,1% | 32,8 | 33,3 | 1,6% | 4,70 | 4,58 | -2,7% |
| | LOS DEMAS | 440,9 | 438,7 | -0,5% | 54,5 | 54,2 | -0,5% | 8,09 | 8,09 | 0,0% |
| TOTAL VINO FRACCIONADO TRANQUILO | | 5.165,3 | 5.346,0 | 3,5% | 62,7 | 65,2 | 3,9% | 82,37 | 82,06 | -0,4% |

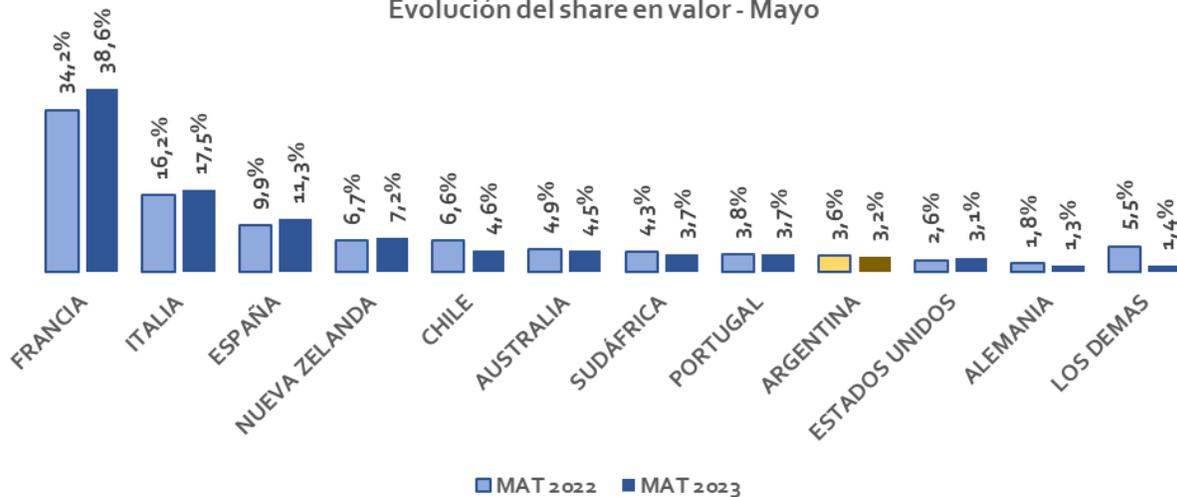


Principales orígenes vino fraccionado tranquilo en Reino Unido

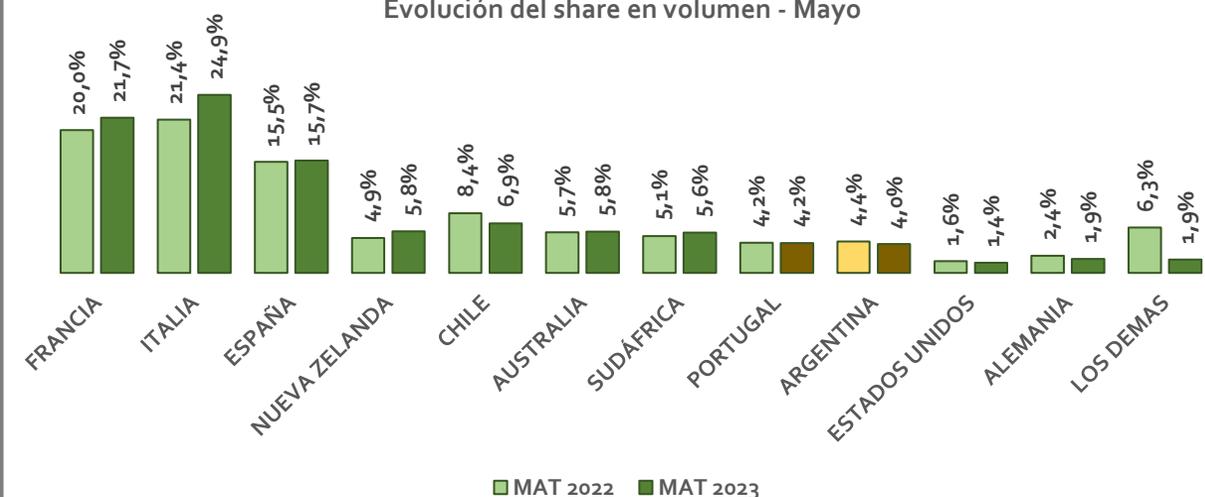
Últimos doce meses cerrados en Mayo 2023 – MAT

| IMPORTADORES | | IMPORTACION CIF (MM U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (MM CAJAS) | | |
|---|------------------|---------------------------|----------------|--------------|---------------------------|-------------|-------------|--------------------|--------------|--------------|
| | | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 | FRANCIA | 1.097,8 | 1.166,9 | 9,0% | 70,4 | 78,8 | 11,8% | 15,59 | 14,82 | -3,6% |
| 2 | ITALIA | 520,5 | 528,5 | 11,0% | 31,1 | 31,1 | -0,1% | 16,72 | 16,99 | 3,9% |
| 3 | ESPAÑA | 317,6 | 342,0 | 7,5% | 26,2 | 31,9 | 21,8% | 12,11 | 10,71 | 11,6% |
| 4 | NUEVA ZELANDA | 213,7 | 216,8 | 5,9% | 56,0 | 54,6 | -2,6% | 3,81 | 3,97 | -0,7% |
| 5 | CHILE | 212,3 | 137,7 | 12,8% | 32,5 | 29,1 | -10,5% | 6,52 | 4,73 | 18,4% |
| 6 | AUSTRALIA | 155,9 | 135,1 | 14,3% | 35,3 | 34,4 | -2,7% | 4,41 | 3,93 | 14,4% |
| 7 | SUDÁFRICA | 138,5 | 111,6 | 28,7% | 34,6 | 29,0 | -16,1% | 4,00 | 3,85 | 27,5% |
| 8 | PORTUGAL | 120,6 | 111,5 | 30,0% | 36,9 | 39,0 | 5,8% | 3,27 | 2,86 | 6,2% |
| 9 | ARGENTINA | 116,1 | 97,1 | 21,1% | 33,8 | 35,2 | 4,1% | 3,43 | 2,76 | 21,7% |
| 10 | ESTADOS UNIDOS | 82,5 | 93,1 | 9,9% | 64,5 | 96,9 | 50,3% | 1,28 | 0,96 | 3,1% |
| 11 | ALEMANIA | 58,6 | 39,4 | -53,2% | 31,4 | 29,9 | -4,8% | 1,86 | 1,32 | -58,7% |
| | LOS DEMAS | 175,1 | 42,2 | -75,9% | 35,4 | 33,2 | -6,1% | 4,95 | 1,27 | -74,3% |
| TOTAL VINO FRACCIONADO TRANQUILO | | 3.209,1 | 3.022,1 | 5,9% | 41,2 | 44,3 | 7,7% | 77,97 | 68,16 | 0,4% |

Evolución del share en valor - Mayo



Evolución del share en volumen - Mayo

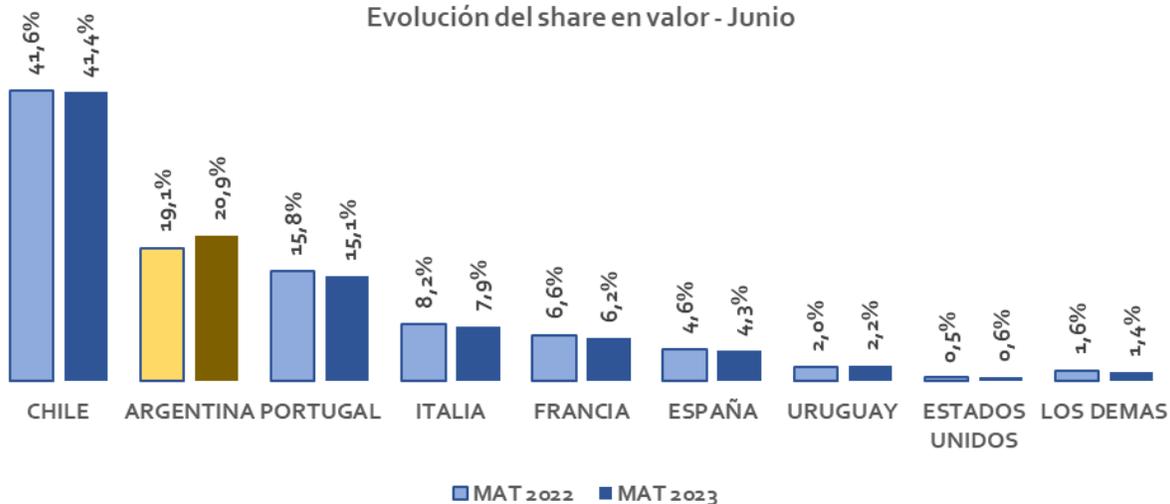


Principales orígenes vino fraccionado tranquilo en Brasil

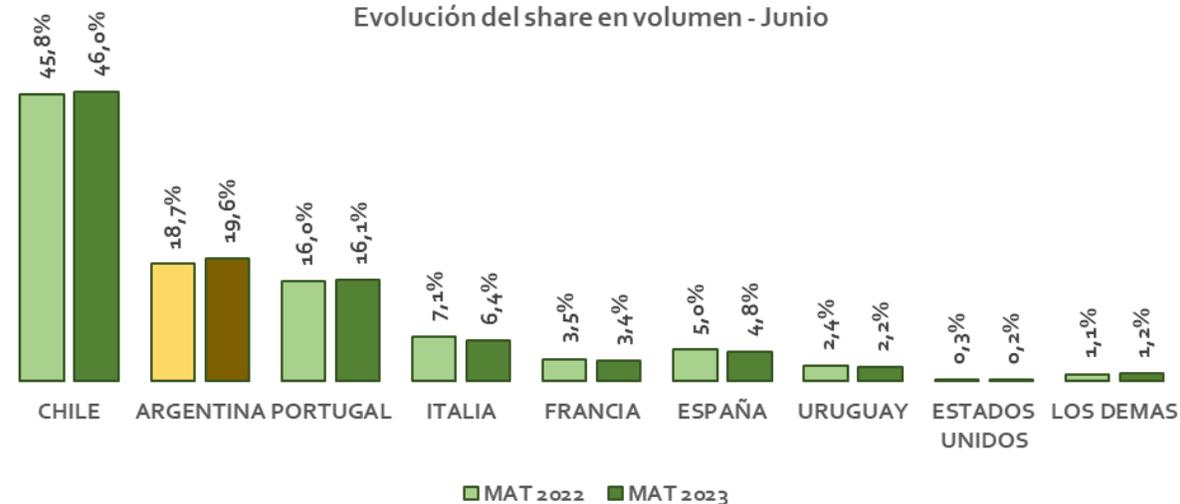
Últimos doce meses cerrados en Junio 2023 – MAT

| EXPORTADORES | IMPORTACION CIF (MM U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (MM CAJAS) | | |
|---|---------------------------|---------------|--------------|---------------------------|-------------|-------------|--------------------|--------------|--------------|
| | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 CHILE | 180,94 | 176,63 | 0,2% | 23,9 | 24,3 | 1,6% | 7,56 | 7,27 | -1,7% |
| 2 ARGENTINA | 82,92 | 89,27 | 1,9% | 26,8 | 28,9 | 7,7% | 3,09 | 3,09 | -1,9% |
| 3 PORTUGAL | 68,62 | 64,42 | -15,2% | 25,9 | 25,4 | -1,8% | 2,65 | 2,53 | -11,7% |
| 4 ITALIA | 35,54 | 33,49 | -11,0% | 30,5 | 32,9 | 7,9% | 1,17 | 1,02 | -4,8% |
| 5 FRANCIA | 28,81 | 26,35 | -15,8% | 49,5 | 49,3 | -0,5% | 0,58 | 0,53 | -28,0% |
| 6 ESPAÑA | 20,05 | 18,51 | -22,4% | 24,1 | 24,5 | 1,8% | 0,83 | 0,75 | -18,9% |
| 7 URUGUAY | 8,82 | 9,47 | -25,5% | 22,0 | 26,8 | 21,7% | 0,40 | 0,35 | -26,1% |
| 8 ESTADOS UNIDOS | 2,39 | 2,52 | -0,1% | 45,5 | 64,3 | 41,3% | 0,05 | 0,04 | -17,3% |
| LOS DEMAS | 7,03 | 5,87 | -16,6% | 37,8 | 31,1 | -17,6% | 0,19 | 0,19 | 1,3% |
| TOTAL VINO FRACCIONADO TRANQUILO | 435,12 | 426,53 | -5,7% | 26,3 | 27,0 | 2,7% | 16,52 | 15,78 | -6,5% |

Evolución del share en valor - Junio



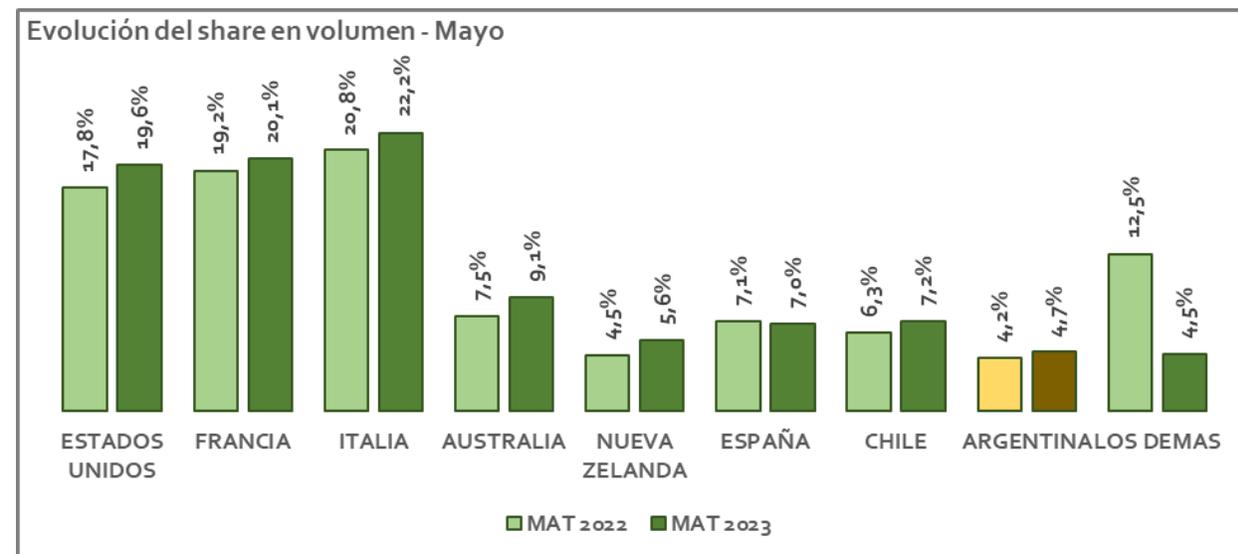
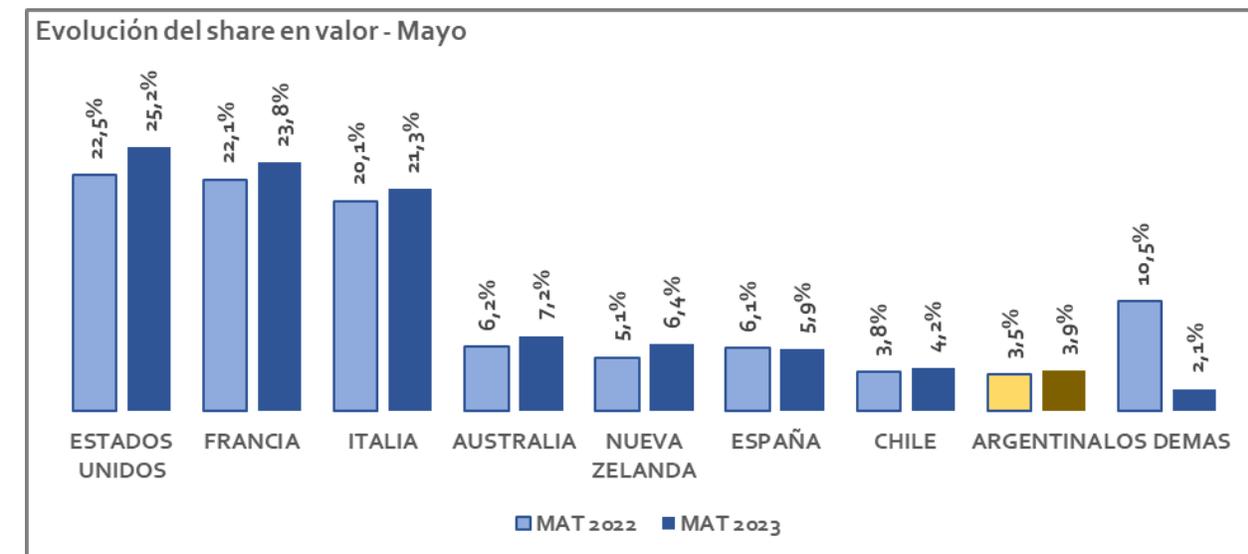
Evolución del share en volumen - Junio



Principales orígenes vino fraccionado tranquilo en Canadá

Últimos doce meses cerrados en Mayo 2023 – MAT

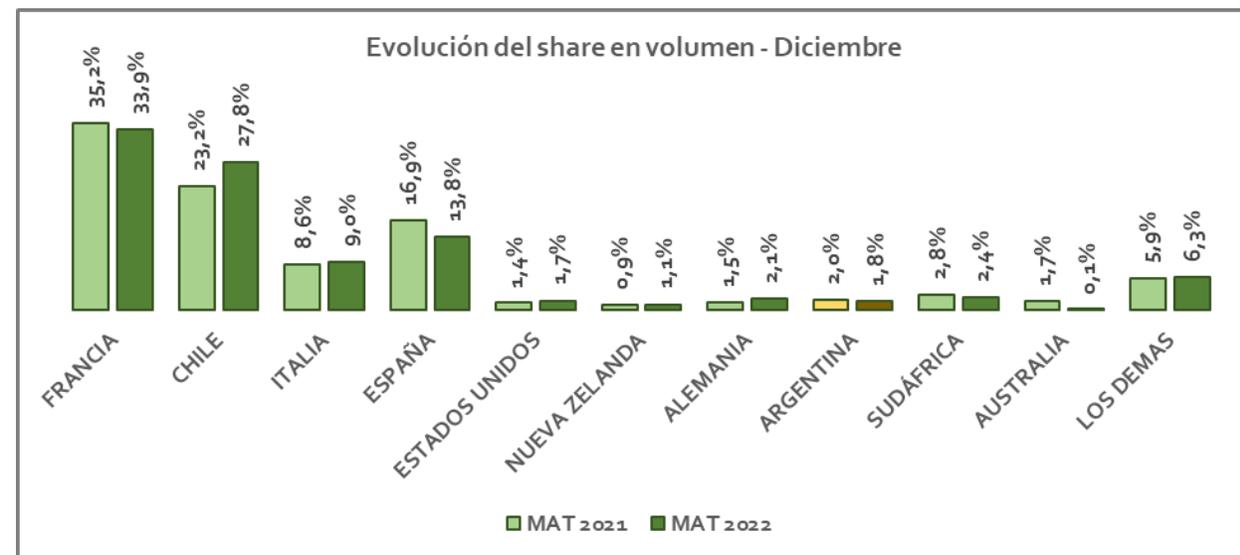
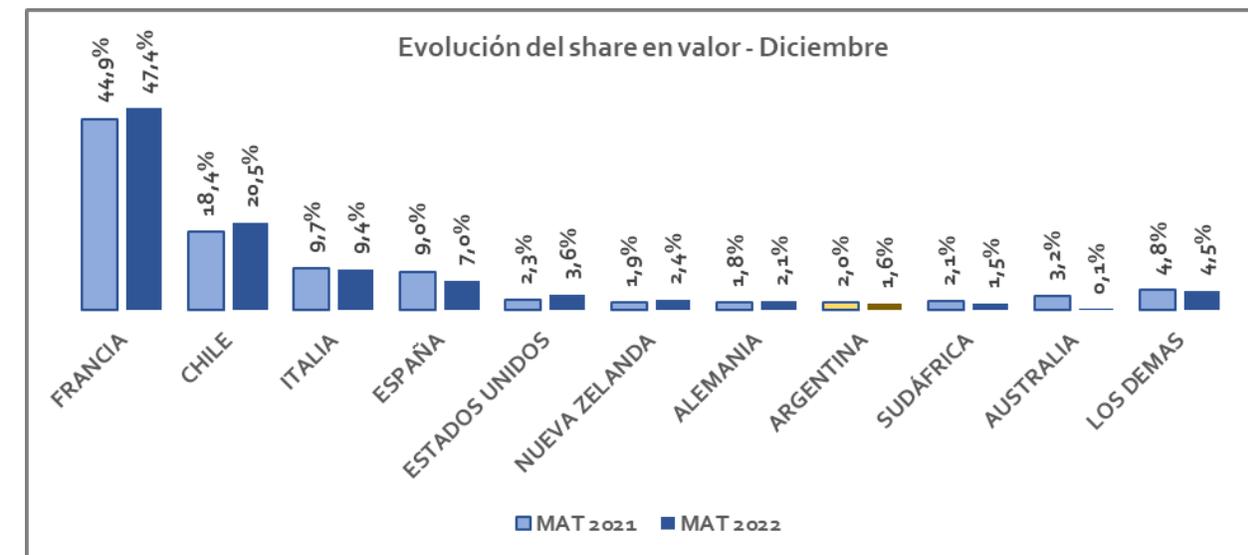
| EXPORTADORES | | IMPORTACION CIF (MM U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (MM CAJAS) | | |
|-------------------|------------------|---------------------------|-----------------|-------------|---------------------------|-------------|--------------|--------------------|--------------|-------------|
| | | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION | MAT 2022 | MAT 2023 | VARIACION |
| 1 | ESTADOS UNIDOS | 447,61 | 451,10 | 1,7% | 78,6 | 78,7 | 0,1% | 5,69 | 5,73 | -4,5% |
| 2 | FRANCIA | 439,67 | 426,33 | 8,2% | 71,9 | 72,5 | 0,8% | 6,11 | 5,88 | 2,8% |
| 3 | ITALIA | 399,04 | 381,21 | 6,8% | 60,2 | 58,9 | -2,1% | 6,63 | 6,47 | 0,9% |
| 4 | AUSTRALIA | 122,15 | 128,28 | 1,7% | 50,7 | 48,5 | -4,4% | 2,41 | 2,64 | 0,0% |
| 5 | NUEVA ZELANDA | 101,82 | 114,26 | -4,5% | 71,3 | 69,6 | -2,3% | 1,43 | 1,64 | -8,9% |
| 6 | ESPAÑA | 120,76 | 106,15 | 28,7% | 53,1 | 51,9 | -2,2% | 2,28 | 2,04 | 22,6% |
| 7 | CHILE | 75,46 | 75,33 | 17,4% | 37,6 | 36,0 | -4,2% | 2,01 | 2,09 | 11,4% |
| 8 | ARGENTINA | 69,80 | 69,21 | 9,5% | 51,5 | 50,2 | -2,6% | 1,36 | 1,38 | 8,5% |
| | LOS DEMAS | 209,36 | 38,14 | -81,8% | 52,3 | 28,7 | -45,1% | 4,00 | 1,33 | -66,8% |
| TOTAL VINO | | 1.985,67 | 1.789,99 | 5,7% | 62,2 | 61,3 | -1,5% | 31,91 | 29,21 | 0,7% |



Principales orígenes vino fraccionado tranquilo en China

Últimos doce meses cerrados en Diciembre de 2022 – MAT

| EXPORTADORES | | IMPORTACION CIF (MM U\$S) | | | PRECIO PROMEDIO U\$S/CAJA | | | VOLUMEN (MM CAJAS) | | |
|---|------------------|---------------------------|----------------|---------------|---------------------------|-------------|--------------|--------------------|--------------|---------------|
| | | MAT 2021 | MAT 2022 | VARIACION | MAT 2021 | MAT 2022 | VARIACION | MAT 2021 | MAT 2022 | VARIACION |
| 1 | FRANCIA | 654,9 | 579,4 | -11,5% | 58,7 | 71,2 | 21,5% | 11,16 | 8,13 | -27,2% |
| 2 | CHILE | 267,7 | 250,5 | -6,4% | 36,4 | 37,6 | 3,3% | 7,35 | 6,66 | -9,4% |
| 3 | ITALIA | 141,8 | 115,6 | -18,5% | 51,8 | 53,3 | 2,9% | 2,74 | 2,17 | -20,8% |
| 4 | ESPAÑA | 131,8 | 85,1 | -35,4% | 24,6 | 25,7 | 4,6% | 5,35 | 3,31 | -38,2% |
| 5 | ESTADOS UNIDOS | 34,2 | 43,7 | 27,9% | 78,2 | 106,3 | 35,9% | 0,44 | 0,41 | -5,9% |
| 6 | NUEVA ZELANDA | 27,2 | 29,5 | 8,4% | 92,3 | 110,7 | 19,9% | 0,30 | 0,27 | -9,6% |
| 7 | ALEMANIA | 25,7 | 25,1 | -2,2% | 55,4 | 49,6 | -10,6% | 0,46 | 0,51 | 9,3% |
| 8 | ARGENTINA | 28,5 | 19,7 | -30,9% | 45,2 | 46,7 | 3,4% | 0,63 | 0,42 | -33,1% |
| 9 | SUDÁFRICA | 30,2 | 18,7 | -38,1% | 33,5 | 32,3 | -3,4% | 0,90 | 0,58 | -36,0% |
| 10 | AUSTRALIA | 46,3 | 1,3 | -97,2% | 88,2 | 37,4 | -57,6% | 0,52 | 0,04 | -93,3% |
| | LOS DEMAS | 69,4 | 54,8 | -21,1% | 37,2 | 36,5 | -1,9% | 1,87 | 1,50 | -19,6% |
| TOTAL VINO FRACCIONADO TRANQUILO | | 1.457,7 | 1.223,5 | -16,1% | 45,9 | 51,0 | 11,0% | 31,72 | 23,99 | -24,4% |



Centro de Estudios Económicos de Bodegas de Argentina