SITEVI

The international exhibition for the vine, wine, fruit and olive growing sectors

28>30 NOVEMBER 2023

MONTPELLIER FRANCE

COMEXPOSIUM AXEMA

With the support of: Région Occitanie, Sud de France

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PRESS RELEASE
SEPTEMBER 2023

CONTENTS

ÉDITO

DAMIEN DUBRULLE
Chairman of Axema

THE VINE, WINE AND OLIVE GROWING SECTORS ARE CURRENTLY CONFRONTED WITH EVER FASTER AND FIERCER CHALLENGES

- The combined pressure of diseases and reducing or stopping the use of chemical products. This year, our vines were especially affected by mildew.
- Rapid climate change, which this year was regrettably illustrated by a critical drought together with extreme temperatures, constituting a threat to vines and a factor that alters vinification.
- An increasingly flagrant shortfall in labour. There is a need for ever higher technical skills in both winegrowing and other crops, which reduces the appeal of the sector.

MECHANISATION, AND MORE GENERALLY THE AUTOMATION OF THE VARIOUS CROPPING PHASES, CONSTITUTES SOLUTIONS TO THESE CHALLENGES

- Robotisation is already here and is developing rapidly, even if legal requirements mean that there are limits to their autonomy between plots. Vineyard monitoring and artificial vision will make it possible to detect problems at an earlier stage and treat vines with pinpoint precision.
- The digitalisation of data helps to capitalise on experience acquired over time and in the growing location. This capitalisation brings with it the opportunity of developing a multitude of increasingly efficient decision support tools. Increasing numbers of sensors provide useful information in real time and on machines in the winery.
- Introducing self-driving technology on winegrowing machines also improves working conditions and safety, and protects the vine plants.

Thanks to the quantity and diversity of the participants at SITEVI, winegrowers, winemakers and olive grower can find solutions to all the questions they are asking themselves. It is by mobilising all the sector's players that we will be able to develop machines at the same rate as the climate change we are experiencing today, and reduce the sector's carbon footprint so as to preserve our vineyards and more broadly all our crops.

EDITO

As the leading world event, SITEVI once again displays its dynamism!

CHRISTOPHE LECARPENTIER
Director of SITEVI

With stand space fully sold out five months before it opens, SITEVI 2023 is already shaping up to be an exceptional vintage through the diversity of its product offering, its international reach, its profusion of content and the many innovations that will be unveiled there. More than ever, the show is recognised as a crucial gathering for all the professionals in the vine, wine, fruit and olive growing sectors. A meeting that goes straight to the heart of the strategic challenges of now and the future, helping people better understand market trends and discover innovations, facilitating encounters, accelerating business and showcasing job disciplines and talent. An unmissable event at which to tackle all the economic, societal and environmental challenges ahead.

AN EXHAUSTIVE AND INTERNATIONAL OFFERING

Once again, SITEVI will take up the entire grounds of the Montpellier exhibition centre. A thousand exhibitors will be present, including more than 240 newcomers spread across all the key sectors: viticulture, vinification and bottling/packaging, agri-inputs, traction, new technology, etc. The latter sector, along with robotics, will be particularly well represented with more than 40 exhibitors. This positive trend is also valid for complementary sectors, notably that of olive growing, a solution that many winegrowers are turning to in an attempt to diversify their activity. Moreover, the 2023 show will see a sharp increase in the international exhibitor contingent, this year standing at 24% of the total number of exhibitors, hailing from 18 countries.

A SHOW FOR THOUGHT AND SOLUTIONS

On a backdrop of profoundly changing markets, SITEVI resolutely adopts the stance of a pathfinder and a decoder – to accompany visitors and bring them tangible responses. To do so, the 2023 edition will host an array of special features and highlights:

- **A comprehensive programme** of 50 talks and workshops, organised by the IFV and the show's partners around seven themes covering all the strategic challenges in the sectors,
- **Olive Day** on Tuesday 28 November in partnership with France Olive, offering a combo of talks and masterclasses,
- **A Job Dating area** open to job seekers, young graduates and employees looking for a career change,
- **Masterclasses,** offering visitors the opportunity to discover the diversity of winegrowing regions during convivial and instructive tasting sessions,
- **Business Meetings** between visitors with projects and exhibitors, to create connections quickly and find tangible solutions to help bring these projects to fruition.

AN INNOVATION CATALYST

Innovation is part and parcel of SITEVI. The exhibition plays a key role by bringing together industry figures, exhibitors and specialists to unveil the latest technologies, the new sustainable farming practices and the latest breakthroughs in the production and marketing of wine, fruit, vegetables and olives.
As a result, the 2023 vintage of the SITEVI Innovation Awards, a competition with international renown, is shaping up to be an exceptional one with 76 exhibitors registered and 106 entries submitted, representing an 80% increase compared with the 2021 edition. The international judging panel, comprising the best French and international specialists, has shortlisted 37 nominees. The winners will be revealed at a social evening on Tuesday 28 November.
Innovation will also be in the spotlight with LABTECH, a new feature at the 2023 show. Designed in partnership with Agri Sud-Ouest Innovation, La Ferme Digitale and La Wine Tech, this area will gather more than 15 companies displaying their innovations, new solutions and new technologies to cater to labour shortages, improve productivity or enhance working conditions.

Thanks to the support of the Occitanie/Pyrénées-Méditerranée Regional Authority, the loyalty of its exhibitors and visitors, and the wealth of content it proposes, SITEVI is more than ever assuming its status as the essential and unmissable event for the entire ecosystem.

FACT SHEET

VENUE
Montpellier Exhibition Centre

DATES
Tuesday 28 to Thursday 30 November 2023

OPEN FROM
8.30 am to 6 pm

FREQUENCY
Biennial - odd-numbered years

CREATED IN
1977

EDITION
31th

Fact Sheet

1000 exhibitors
including **24%** non-french exhibitors, from **18** countries

240 new exhibitors

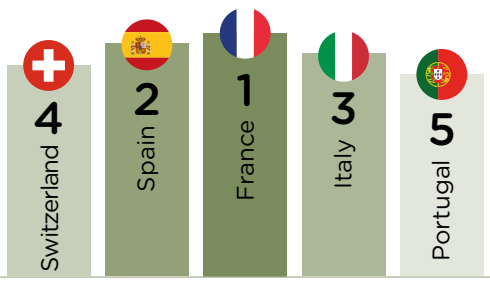
55 000 professional entries
from **61** countries in 2021

90% exhibitor satisfaction
with quality of French visitors*

66% of visitors
come to SITEVI to discover new products/innovations*

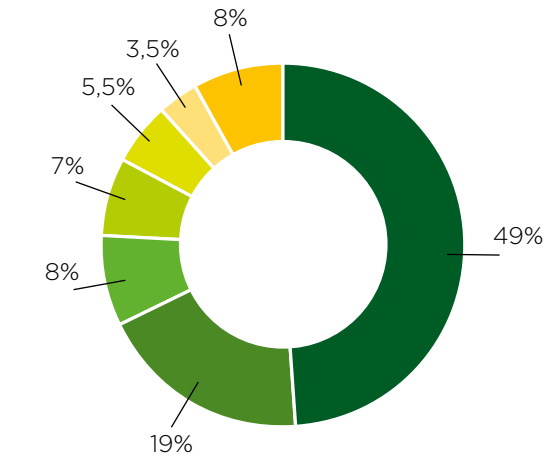
300 new Products

Top visiting countries



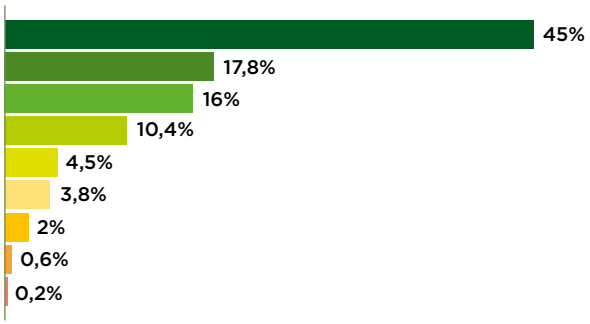
* Source: Enquête ADquation SITEVI Février 2022

Qualified visitors



- Winegrower / winemaker
- Equipment manufacturer / dealer
- Trade association / training / services
- Wine trader, winery manager
- Fruit / vegetable farmer
- Olivier farmer
- Other

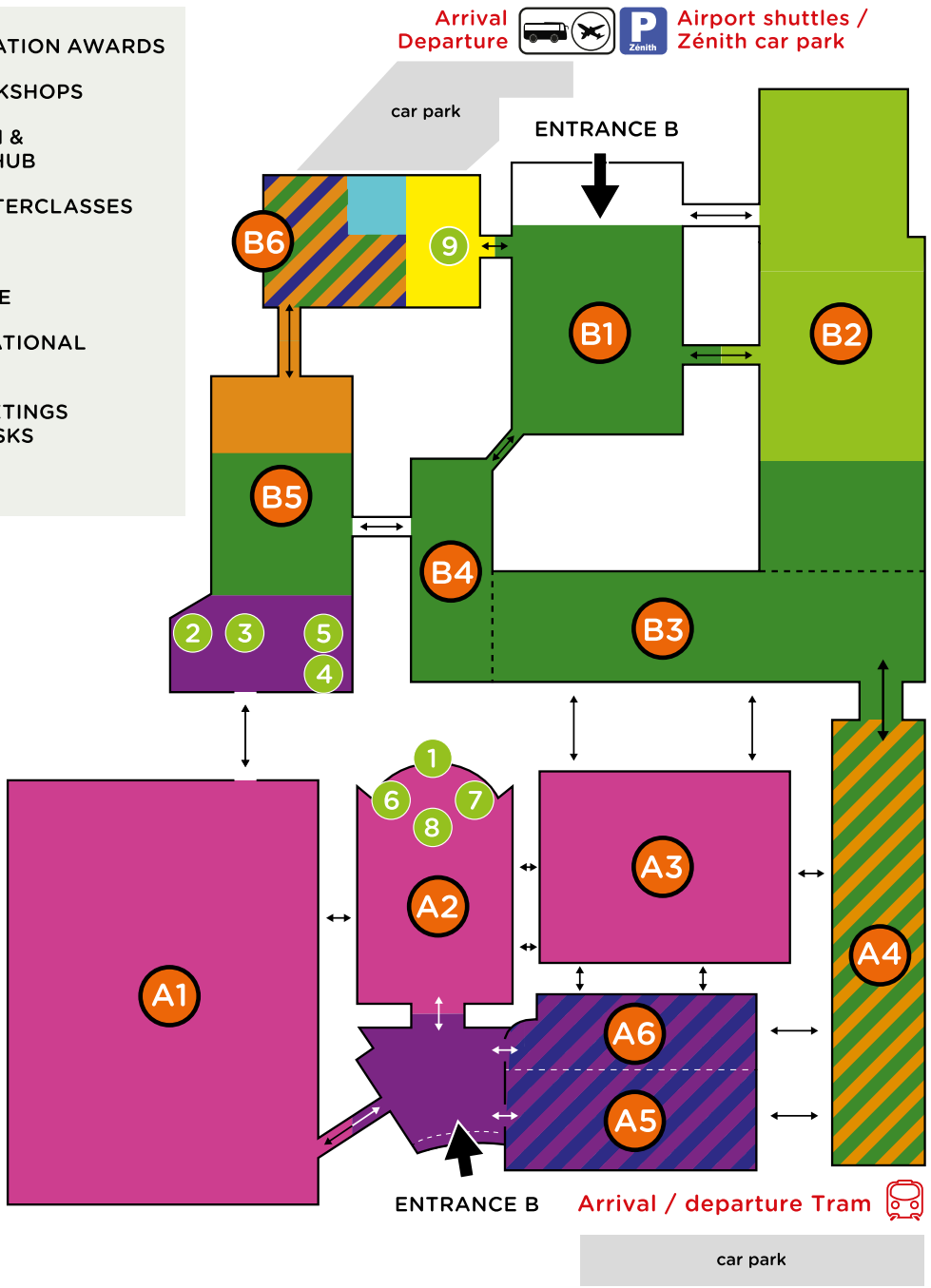
Sectors of activity



1. Equipment all sectors
2. Equipment & solutions for vinification, oenologu and processing
3. Equipment & solutions for winegrowing
4. Bottling and packaging
5. Inputs
6. Services
7. Fruit growing
8. Olive growing
9. Renewable energy

EXHIBITION MAP

1. SITEVI INNOVATION AWARDS
2. TALKS & WORKSHOPS
3. IFV RESEARCH & INNOVATION HUB
4. TASTING MASTERCLASSES
5. JOB DATING
6. PRESS LOUNGE
7. VIP & INTERNATIONAL LOUNGE
8. BUSINESS MEETINGS WELCOME DESKS
9. LAB TECH



- Œnology: **A1-A2-A3**
- Wine-making: **A1-A2-A3**
- Packaging: **A2-A3**
- Crop protection products, fertilizer: **A5-A6-B6**
- Vine nurseries: **A5-A6-B6**
- Services: **Entrance A-A5-A6-B5**
- New technologies: **B6**
- Irrigation: **B6**
- Specific equipment for fruit, vegetable and olive growing: **A4-B5-B6**
- Grape harvesting machines: **B2**
- Tractor : **B2-B3**
- Tilling: **A4-B3-B4-B5**
- Crop protection: **B1-B2-B5**
- Grafting and tying : **A4-B4-B5-B6**
- Handling: **B3-B4**
- Green areas, forestry: **A4-B3-B4-B5**

NEW FEATURES
and highlights

NEW TECHNOLOGIES
New technologies will be showcased at this year's exhibition through the range on offer at the show and the content of some talks and panel discussions.
They will be represented in the various halls of the exhibition, and particularly in LAB TECH, in Hall B6, a dedicated space for discussion, in partnership with Agri Sud-ouest Innovation, La Ferme Digitale and La Wine Tech.
From 5pm on 29 November in Hall B5 Room C, there will be plenty of opportunities for investors, start-ups, exhibiting manufacturers and top buyers to get together and exchange ideas, with the aim of accelerating the growth of these new technology companies!

AN EXTENDED EXHIBITION AREA
This year SITEVI has built a temporary hall to increase exhibition space and shine a light on ever more ranges and solutions, but also to improve visitor conditions.
Make a beeline for Hall B6.

TALKS AND WORKSHOPS
50 talks and round tables led by experts to address the challenges and issues of the vine, wine, fruit and olive sectors. But also to discover the latest trends and innovative solutions and discuss practical problems encountered today.
Organised by IFV and the exhibition's partners, these events attract an average of 2,000 attendees over three days.

MASTERCLASS AND TASTING FORUM
Masterclasses and tasting sessions of wine and olive oil will be hosted by winegrowers and professionals, offering visitors an opportunity to discover the diversity of French wine and olive growing regions. The masterclasses will be offered and presented by IFV, France Olive and Œnologues de France. Nearly 1,000 people took part in them at the 2021 edition.

JOBS & TRAINING
For the first time, SITEVI is offering exhibitors, in partnership with HelloWork, a dedicated platform for posting their job offers free of charge. This will enable us to concentrate all our vacancies in one place and send them to interested trade visitors.
To take things a step further, Jobagri and Vitijob are once again on hand to organise job dating during the 3 days of the exhibition, in the forum in Hall B5. This is an opportunity for companies that are recruiting to meet candidates for their vacancies directly on site, and perhaps meet the perfect match. On the training side, our students will be able to find a number of organisations such as APECITA and APRODEMA in the Forum in Hall B5.

BUSINESS MEETINGS
The organisation of these appointments between visitors with projects and the show's exhibitors will help create connections rapidly and find concrete solutions to enable projects to progress. These business meetings resulted in more than 500 appointments in 2021.

This year, the main subject headings are:
- **Agroecology**
- **Climate change**
- **Equipment and new technology**
- **Oenology**
- **Resistant varieties**
- **Organic viticulture**

50
talks and workshops
led by experts

FOCUS ON...
the tasting masterclasses

Once again at SITEVI, visitors will be able to take part in unique tasting workshops on the aromatic profile of wines and olive oils. Original and convivial **masterclasses, led by professionals from all the major wine and olive-growing regions,** will enable visitors, beginners and initiates alike, to discover what makes the spirit of a wine or olive oil. Masterclasses on Tuesday afternoon and Wednesday morning will be simultaneously translated into English.

© Antonio Gravante

FOR THE VINE-GROWING AND WINE-PRODUCING SECTORS, THEY WILL COVER THE FOLLOWING TOPICS:

- **Resistant varieties: Floreal typicality in different French regions**
  Speakers
  Charlotte Anneraud et Christophe Séréno
  Partner Institut Français de la Vigne et du Vin

- **Preserving wine acidity in a context of climate change**
  Speakers
  Carole Honoré-Chedozeau et Méven Otheguy
  Partner Institut Français de la Vigne et du Vin

- **How to recognize wine defects?**
  Speakers
  Emy Heguiaphal et Charlotte Anneraud
  Partner Institut Français de la Vigne et du Vin

- **Rosés from resistant varieties**
  Speaker
  Nathalie Pouzalgues
  Partner Institut Français de la Vigne et du Vin

- **Climate change: diversify your vineyard with drought-tolerant foreign varieties**
  Speakers
  Régis Cailleau et Christophe Séréno
  Partner Institut Français de la Vigne et du Vin

- **Panorama des Vins Rosés du Monde: Vinalies Mondial du Rosé medals**
  Speaker
  Nathalie Pouzalgues - Centre du Rosé
  Partner Œnologues de France

- **NO/LOW dealcoholized wines: where and how?**
  Speaker
  Nicolas Dutour - Laboratoires Dubernet
  Partner Œnologues de France

- **The ageing potential of Hérault wines, feedback from the departmental oenotheque**
  Partner Conseil Départemental de l'Hérault

TO PROMOTE DISCOVERY AND EXCHANGE IN THE VITICULTURE, VINICULTURE, ARBORICULTURE AND OLIVE-GROWING SECTORS, SITEVI 2023 ONCE AGAIN INVITES YOU TO ITS TASTING MASTERCLASSES!

Consult full **details of the programme** online: **www.sitevi.com**

FOR THE OLIVE SECTOR, THE MASTERCLASSES WILL COVER A WIDE RANGE OF TOPICS:

- **Introduction to tasting Huiles d'olive de France and discovering the three families of flavors**

An overview of the aromatic diversity of olive oils, tips for tasting and choosing your oil.

- **Discover the uniqueness and diversity of French olive oils**

French olive oil is not unique, but offers a wide variety of tastes, with variety, terroir and know-how all playing a part in the taste of olive oil. Discover a few special oils, offering original, singular tastes...

- **French PDO olive oils**

A link between product and terroir - that's what PDO stands for. For olive oils, this link means special tastes and unique aromatic notes. Amateur or novice, come and discover them!

- **Discover the olive oils of the terroirs between Provence and Occitania**

PDO, monovarietal, polyvarietal... taste the diversity of Midi olive oils.

- **Olive oil: what's the difference between mature and ripe olives?**

Why do we speak of matured or ripe olives? Taste oils from both taste families and discover their differences...

- **Intensity, sweetness, fruitiness...**

Vocabulary and experience the diversity of French olive oils!

Speaker Alexandra Paris – France Olive

FULL PROGRAMME
of tasting masterclasses

	TUESDAY 28TH OF NOVEMBER	WEDENESDAY 29TH OF NOVEMBER	THURSDAY 23TH OF NOVEMBER
9:30 am - 10:00 am	Climate change: diversify your vineyard with drought-tolerant foreign varieties	How to recognize wine defects?	Preserving wine acidity in a context of climate change
10:00 am - 10:30 am			
10:30 am - 11:00 am	Resistant varieties : Floreal typicality in different French regions	Discovering the uniqueness and diversity of French olive oils	Olive oil: what's the difference between ripe and mature olives?
11:00 - 11:30 am			
11:30 am - 12:00 pm	Panorama of the world's rosé wines: Vinalies Medals Mondial du rosé	Panorama of the world's rosé wines: Vinalies Medals Mondial du rosé	The ageing potential of Hérault wines, feedback from the departmental oenotheque
12:00 pm - 12:30 pm			
12:30 pm - 1:00 pm	NO/LOW dealcoholized wines: how and where?	NO/LOW dealcoholized wines: how and where?	How to recognize wine defects?
1:00 pm - 1:30 pm			
1:30 pm - 2:00 pm	How to recognize wine defects?	French PDO olive oils	Climate change: diversify your vineyard with drought-tolerant foreign varieties
2:00 pm - 2:30 pm			
2:30 pm - 3:00 pm	Preserving wine acidity in a context of climate change	Resistant varieties: Floreal typicality in different French regions	Rosés made from resistant varieties
3:00 pm - 3:30 pm			
3:30 pm - 4:00 pm	Rosés made from resistant varieties	Discovering local olive oils between Provence and Occitania	Intensity, sweetness, fruitiness... a vocabulary for experimenting with the diversity of French olive oils!
4:00 pm - 4:30 pm			
4:30 pm - 5:00 pm	Introduction to tasting French olive oils, discovering the three taste families	Climate change: diversify your vineyard with drought-tolerant foreign varieties	

TASTING MASTERCLASSES ON REGISTRATION ONLY

Simultaneous translation

France Olive
Institut Français de la Vigne et du Vin
Union des Oenologues de France
Conseil Départemental de l'Hérault

NEW TECHNOLOGIES AND LABTECH

New technology at the heart of SITEVI 23

The search for new solutions and new technologies is increasingly becoming a priority for growers, to make up for a lack of manpower, improve their productivity or even their comfort at work. That's why companies responding to these new issues have a prominent place at SITEVI. And to give everyone the chance to take part in the show, LAB TECH will be launched in 2023, in partnership with Agri Sud Ouest Innovation, La Ferme Digitale and La Wine Tech.

AT LABTECH, MORE THAN 16 COMPANIES WILL BE SHOWCASING THEIR INNOVATIONS, AND WILL BE AVAILABLE TO PROFESSIONALS FOR MINI-CONFERENCES, ROUND TABLES AND PITCHES.

List closed on 10/09/2023

LABTECH
at SITEVI 2023

B&S Tech is a family start-up created in 2019 expert in the development of low and non-alcoholic beverages. Our mission is to offer producers and distributors of wines, beers and spirits the opportunity to qualitatively reduce the amount of alcohol in their beverage while maintaining the contributions and benefits of the original product. B&S tech supports producers in the creation of their low or non-alcoholic beverage, from laboratory testing to industrialization, but also in the choice of their equipment.

Cap 2020 provides its customers with information for the assessment and control of agroclimatic and pest-related risks, through two services:

• A metIS® service that provides agroclimatic data and agronomic expertise to anticipate or analyze risks to crops and the execution of cultivation operations,

• A range of CapTrap® connected traps for real-time monitoring of insect pests and biodiversity in agricultural areas.

Founded in 2015 in France, winetech **Chouette** offers a precision viticulture solution to optimize winegrowers' decision-making, in particular to help them reduce their use of inputs while securing their yields. More than a hundred vineyards currently rely on Chouette for precise vineyard monitoring, representing over 20,000 hectares. In February, the French leader in vineyard health diagnostics and management solutions successfully closed a €5 million Series A financing round to accelerate growth, roll out its solution in France and Europe, and continue to develop innovative services for winegrowers.

MYCEA innovates and designs tomorrow's bio-solutions for a sustainable agriculture. They research and develop natural alternatives to conventional plant protection products and chemical fertilizers used in agriculture. Their innovation resides in exploring the biological and biochemical properties of fungi, to develop biopesticides and biostimulants that respect the environment and human health.

MYCOPHYTO provides concrete solutions for regenerative agriculture. The company, founded in 2017, develops unique biological soil revitalization solutions to reduce water and chemical fertilizer inputs (up to 20% reduction in water and synthetic fertilizers) through the optimization of associations between plants and mycorrhizal fungi adapted to each territory and each crop.

MyEasyFarm: An unavoidable player in precision farming, MyEasyFarm is the premium solution to manage a farm at one's fingertips and monitor activities in real time. Easy to use and secure, MyEasyFarm centralises all your data and agricultural activities.

Defining plots, planning the work to be carried out every day, allocating machines and workers to each task and analysing the results of a season's work all become very easy. The digital platform simply aggregates the different sources of intra-plot data. The direct connection with the farm equipment is one of its assets. No more flash drives! Everything is done in a click to send input modulation data to the control panels of the tractors, and in the other direction to record the work performed! In short, farmers can apply the right quantity of inputs in the right place at the right time, with the aim being to increase yield while protecting the environment. In addition, since the solution is interoperable, it dovetails with all existing programs and all tractor control panels, saving a lot of data entry time.
To go even further in supporting farmers in their everyday jobs while taking environmental issues into consideration, MyEasyFarm launches MyEasyCarbon. In connection with the future Row Crop Low Carbon label, the solution aims to analyse the farm and define an action plan to substantially reduce carbon emissions and create carbon credits over several years.

OpenWineData offers the wine industry a common platform for accessible, reliable, standardized and secure data offers. Why is data crucial to transform the wine sector and help it face the challenges of tomorrow?
The amount of data generated by new vintages over the last 50 years is exponential. There is no reliable source aggregating this information and making it available and usable to the 558,000 professionals working in the wine sector in France. On a global scale, at least 5 times more data on wine is generated. The opportunity to gather, structure and valorize this data in France can allow our vineyards to stay ahead and position France as the world leader in data in the wine sector.

OpenWineData is a common good at the service of the competitiveness of the French sector. The digitalization of our societies leads to a structural and technological platformization of the economy. In this context, the French wine industry of excellence risks being intermediated by actors, mostly foreigners, who capture its value. From raw data to business impact, the platform democratizes access to data and allows the sector to be more competitive and enhance the quality of French production.
The pooling of digital infrastructures allows the sector to innovate in conjunction with public research actors and start-ups. The creation of Data commons makes it possible to develop innovative solutions to conquer new international markets.

Ombrea develops agrivoltaic solutions for outdoor crops (vineyards, fruit trees, or field crops). We pilot agrivoltaic systems, equipped with solar panels placed above agricultural plots. Our goal is to create the ideal microclimate for the proper development of the crop, even in the event of extreme climatic hazards (drought, heat wave, hail, etc.). The solution developed by Ombrea thus combines crop protection and renewable energy production.

LABTECH
at SITEVI 2023

Wine Pilot is the dedicated branch of Food Pilot, our digital solution for measuring and managing environmental progress and decarbonization of each products and each and company's CSR progress.
Wine Pilot primarily addresses the decarbonization challenge focusing on vineyards for climate strategy management (with ADELPHE) and for companies aiming to manage decarbonization, with SBTI goals.

Wine Pilot also enables companies to monitor other environmental KPIs (in addition to carbon) and to measure their environmental footprint through scores. Last but not least, Wine Pilot enables the environmental pillar to be implemented as part of a comprehensive CSR management.

Formerly LiveMarket, **Wineriz** was created in 2020 to support winegrowers in their commercial strategy and customer loyalty. Today, Wineriz offers a holistic approach to customer relations for all producers in the wine and spirits industry. The solution provides owners and managers with the tools to effectively run their business without using half a dozen different software.

AN EXPANDED OFFERING
in the LAB TECH area

Aptimiz is the co-pilot of your wine estates. Its technology optimizes its organization, automates the traceability of all interventions and actions and, it improves its management via precise and innovative indicators. Aptimiz operations are based on real-time measurements of all the activities carried out by men and machines.

Baqio is the first 100% web-based software made for the wine and spirits industry. Available anywhere, anytime. Whether you are on a Mac, PC, tablet or smartphone, at the office or on the go, you can log into your account and securely access all of your data. Baqio includes all the necessary functionalities for the day-to-day management: inventory management, customers CRM, orders/invoicing, customs declaration (DRM, DAE, DSA, DEB..), statistics, point of sales, etc.

Naïo Technologies is a French start-up, a pioneer and global leader in agricultural robotics. Created just over ten years ago by two passionate engineers from the agricultural sector, Gaëtan Séverac and Aymeric Barthes, Naïo Technologies is convinced that it is possible to respect and celebrate our heritage while daring to shape the future and our ecological transition towards a more environmentally friendly precision agriculture that respects ecosystems and humans.

That is why Naïo develops 100% electric and autonomous robots that allow farmers to focus on higher value-added tasks (and leave the robot to take care of tasks such as sowing or weeding), reduce the labor intensity of work or even compensate for the lack of manpower.

Thanks to this information, they can improve their farm's technical, economic and environmental performance, because every decision they make is based on data collected as close to the crop as possible. In 2021, **Weenat** acquired Weather Measures, a leader in spatialized meteorology for the agricultural sector. Its multi-source algorithm makes it possible to provide spatialized weather data with an accuracy of one square kilometer. The new entity integrates the entire agro-meteorological data value chain and now has more than 50 employees, 160 partners and agricultural distributors, 18,000 users and 12,000 sensors installed in 8 European countries.

All registered companies can be found at: **sitevi.com**

PROGRAMME
of workshops and talks

	TUESDAY 28th OF NOVEMBER			
	Theme	**Coordinator**	**Room**	**Type**
9:30 am - 10:30 am	Economic Situation and Future Prospects in the Viticultural Agro-Equipment Sector	Axema	A	
9:30 am - 11:00 am	Advances made on the Vine Dieback Plan	IFV	B	
9:30 am - 11:00 am	Olive Day: Optimising irrigation: soil, control systems, important periods, the Eau'Live newsletter	France Olive	C	
9:30 am - 10:15 am	What can we expect from biosolutions to combat black rot?	IFV	D	
10:30 am - 11:15 am	Changes in practices in response to climate change	IFV	D	
11:00 am - 12:30 pm	Evaluation of soil quality and impact of winegrowing practices.	IFV and INRAE	A	
11:00 am - 12:00 pm	Olive Day: "Oléiculteur", a Decision Support Tool (DST) for a successful olive grove	France Olive	C	
11:30 am - 12:30 pm	How robotics can improve the profitability and durability of my production	FIRA	B	
11:45 am - 12:30 pm	Vinid'Occ Ressenti project: Participative workshop on the acceptability of wines from resistant grape varieties	Institut Agro Montpellier	D	
14:00 pm - 15:00 pm	Wine and health - Tasting and prevention	Union des œnologues de France	A	
14:00 pm - 15:30 pm	How to deploy resistant varieties in Occitania ?	INRAE and IFV	B	
14:00 pm - 16:00 pm	Olive Day: Creation & installation of an olive grove	France Olive	C	
14:00 pm - 15:00 pm	The potential of non - Sacc yeasts in winemaking: wine diversification on the backdrop of climate change	Oenobrands	D	
15:15 pm - 16:45 pm	What levers to adapt the vineyard to water stress?	INRAE	A	
15:15 pm - 16:15 pm	Handing on an estate: levers to control taxation effects	Cerfrance Midi Méditerrannée	D	
15:45 pm - 17:00 pm	Agroecological transition trajectories of a winegrower in Occitania	Région Occitanie	C	
16:15 pm - 17:00 pm	Reducing costs by optimising the monitoring of biological agent in vines and olive trees	Trapview	C	
16:30 pm - 17:30 pm	Wine and digital tech: seizing the opportunities of digital transformation and AI to develop your business, stand out from the competition and create added value	Occitania Regional Economic development Agency - AD'OCC	D	

Talk Workshop Simultaneous translation

	WEDNESDAY 29th OF NOVEMBER			
	Theme	**Coordinator**	**Room**	**Type**
9:00 am - 12:00 pm	Organic winegrowing sector gathering: Changing practices in organic winegrowing and winemaking in 6 30-minute sessions	Sud Vin Bio and IFV	B	
9:30 am - 10:30 am	Practical application of labelling regulation - final stages	Union des œnologues de France	A	
9:30 am - 10:30 am	Cover crops in winegrowing; how to combine organic and biological benefits for the soil, without water competition	Celesta-Lab	C	
9:30 am - 10:15 am	Field feedback on effectiveness of biocontrol products by the DeciVigne solution	Institut Agro Montpellier	D	
10:45 am - 11:45 am	Barometer: State - of - play report on use of digital tech in the vine and winegrowing sector	Vins et Société	C	
11:00 am - 11:45 am	GES&Vit: Solution to measure the carbon footprint of winegrowing estates	IFV	D	
11:30 am - 12:30 am	Robotising the entire growing cycle is possible	FIRA	A	
12:00 pm - 13:00 pm	International Wine In Box competition: introducing this year's winners	Best Wine In Box	C	
12:00 pm - 13:00 pm	Partial or total dealcoholisation of wine in the winery	Union des œnologues de France	D	
14:00 pm - 15:00 pm	What contributions can modelling bring to manage the water stress of vines in view of a given production target and amid climate change ?	Itk	A	
14:00 pm - 15:30 pm	How to pilot the oenology of the future?	INRAE UMR SPO	B	
14:00 pm - 15:30 pm	Biocontrol and biostimulants, what effects on the vine?	IFV	C	
14:00 pm - 15:00 pm	Observing varieties of interest for adaptation purposes	IFV	D	
15:15 pm - 16:45 pm	Eco-responsible innovative vineyard: combining productivity and biodiversity	IFV and Anivin de France	D	
15:45 pm - 16:45 pm	Agricultural robotics	Agri Sud-Ouest Innovation	B	
15:45 pm - 16:45 pm	Innogouv – Governance, innovation and sustainable performance in wine cooperatives	Institut Agro Montpellier and INRAE	C	
16:00 pm - 17:30 pm	Changes in winegrowing practices: a stop to synthetic products and discontinuation of glyphosate	L'institut Agro Montpellier	A	
17:00 pm	Business Angels evening - on invitation		D	Social Event

Talk Workshop Simultaneous translation

	THURSDAY 30th OF NOVEMBER			
	Theme	**Coordinator**	**Room**	**Type**
9:30 am - 11:00 am	Technological innovation in crop protection and soil maintenance: state of play and utlook	IFV	B	
9:30 am - 10:30 am	Cellaring potential of Hérault wines, feedback from department wine archive	Hérault Department Council	C	
9:30 am - 10:15 am	Viticulture and salinisation in coastal areas	Institut Agro Montpellier	D	
10:45 am - 11:45 am	Economic costs of producing grapes by organic agriculture	Cerfrance Midi Méditerrannée	A	
10:45 am - 11:45 am	Why making No/Low wine in France ?	La WineTech	C	
11:00 am - 11:45 am	Monitoring the water status of a vineyard: feedback from methodologies under deployment	Institut Agro Montpellier and IFV	D	
11:15 am - 12:15 pm	Biocontrol and Biosolutions	Agri Sud-Ouest Innovation	A	
14:00 pm - 14:45 pm	Agroecological transition of wine estates: what legal tools?	Jurisvin	A	
14:00 pm - 15:00 pm	Wine and blockchain: use cases	La WineTech	B	
14:00 pm - 15:00 pm	Cover crops and grass cover: personal accounts from winegrower collectives from Occitania on implementation steps	FR Cuma Occitanie	C	
14:00 pm - 15:30 pm	Producing wine according to market trends: is data dictating the rules?	Inno'Vin and Vinseo	D	
15:15 pm - 16:15 pm	Together on the agroecological path: personal accounts from Occitanian winegrowers who have started changing their practices (biocontrol, natural preparations, agro-forestry, etc.)	Unisson - Les Voies de L'agroécologie	A	

OVERVIEW
of the agri-business market in Europe and France

France's positions in European (and global) agriculture

FRUIT

3rd

Biggest producer in Europe
(no.1 Spain – no.2 Italy)

4th

Biggest exporter in Europe

WINE

1st

Global **producer and exporter**

Exports in value in 2022:
€11.6 Bn

VEGETABLES

4th

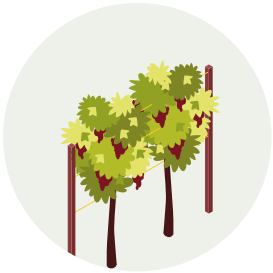
biggest producer and **exporter** in Europe
(No. 1 Italy – No. 2 Spain – No. 3 Germany)

5th

biggest exporter in the world

Number of French farms according to their main production

389,000
farms in France
Average UAE*
63 hectares (ha)



47,000
wine estates
Average 14 ha

15,000
Horticultural or vegetable farms

15,000
Fruit farms

FRANCE
is the leading european agricultural power

France leads Germany, Italy, Spain, Poland and the Netherlands. These six countries account for 69% of European production in the EU + EFTA (European Free Trade Association) countries. In particular, France is the leading European wine, cereal, rapeseed, sunflower, potato, cattle, egg and sugar beet producer. It is also Europe's second largest producer of milk and poultry.

AGRICULTURAL PRODUCTION REACHED A RECORD LEVEL IN 2022: UP 25% IN TWO YEARS

French agricultural production, excluding subsidies, stood at €95.8 billion in 2022, up 16% compared to 2021. Its three components – crop production, livestock production and services – rose respectively by 17.9%, 13.9% and 5.6% in value in 2022. These substantial changes can be explained by the rise in agricultural product prices, estimated by INSEE at an average of 17%, with 19% for plant products, 17% for animal products and 6% for services. In contrast, production volumes generally changed little, with a slight increase for plant products, thanks to the grape harvest and fruit production, stability in services, and a decline in livestock production.

VINEYARD & ORCHARD TRACTORS: DOWN 12.1%, TOTAL IN LINE WITH THE TEN-YEAR AVERAGE

First registrations of vineyard and orchard tractors contracted by 12.1% in 2022 and returned to a level consistent with the average of the last ten years, with 3,751 first registrations recorded last year. In terms of brand ranks, the crossover in the first two positions continues: In 2022, Fendt took over the top spot from New Holland, thanks to a17% increase in its sales of vineyard and orchard tractors. Fendt (up 5.2 pts), Kubota (up 1.8 pt) and Claas (up 1.6 pt) posted the three highest growths in market share in 2022.

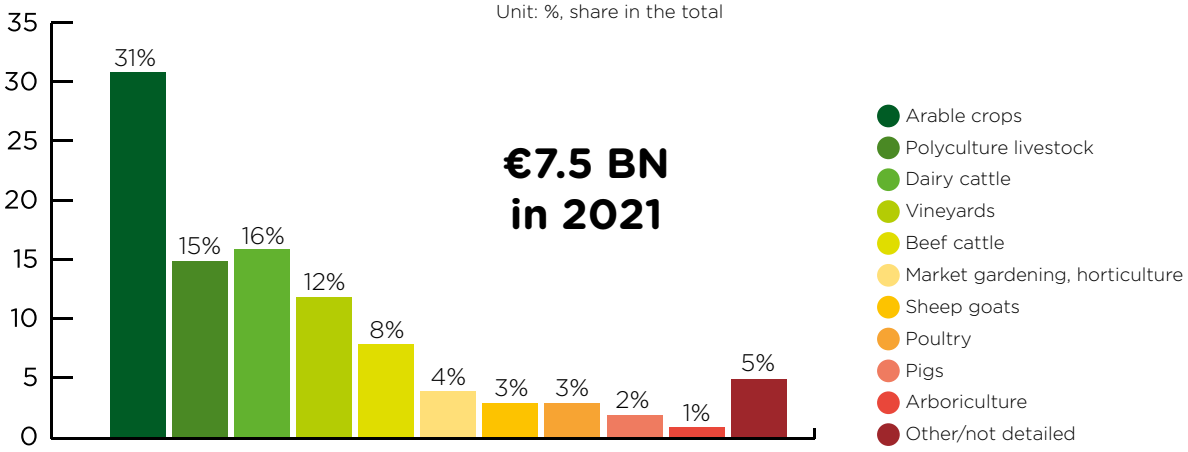
INVESTMENTS HAVE REBOUNDED SINCE 2017

The French agricultural industry invests between 13% and 15% of its production in value each year. In 2021, French agriculture's gross fixed capital formation (GFCF) reached €11.4 bn, up 11% compared to 2020. These investments are divided between acquisitions of equipment (65%), buildings (20%) and other investments (15%: plantings, purchase of animals, software, etc.).

Investments by French farms have rebounded since 2017, after falling steadily from 2012 to 2017. In 2022, they will most probably pass the €12 bn threshold, for the first time since the record in 2012. Investments in equipment and tools (new and used) amounted to €7.5 bn in 2021, up 14% compared to 2020. Arable crops account for almost a third of this amount, followed by rearing of dairy and beef cattle (24%), mixed crop-livestock (15%) and viticulture (12%). According to our estimates, the new equipment segment represents around 75% of equipment investments, i.e. €5.6 bn in 2021. At the European level, France is the country that invests the most in terms of value, ahead of Italy and Germany, but France is slightly below the European average in terms of the investment effort criterion measured by the investment/total production ratio.

Breakdown of investments in equipment in France in 2021 by type of farming

Unit: %, share in the total



Source: AXEMA estimates, via Agreste, data from the Farm Accountancy Data Network (FADN), latest available data 2021.

FOREIGN TRADE:
imports and exports of agricultural machinery

€4.6 BN
the amount of French agri-equipment exports in 2022

Up 17% compared to 2021

167 countries to which France exports agri-equipment

5th international exporter of agri-equipment

37% of exports made to countries outside the EU

€6.8 BN
the amount of French agri-equipment imports in 2022

74% of our imports come from EU countries*

2nd largest international importer of agri-equipment behind the USA

*Of which 33% from Germany and 12% from Italy - Source: AXEMA, according to primary sources INSEE, Eurostat, Customs, Tax returns

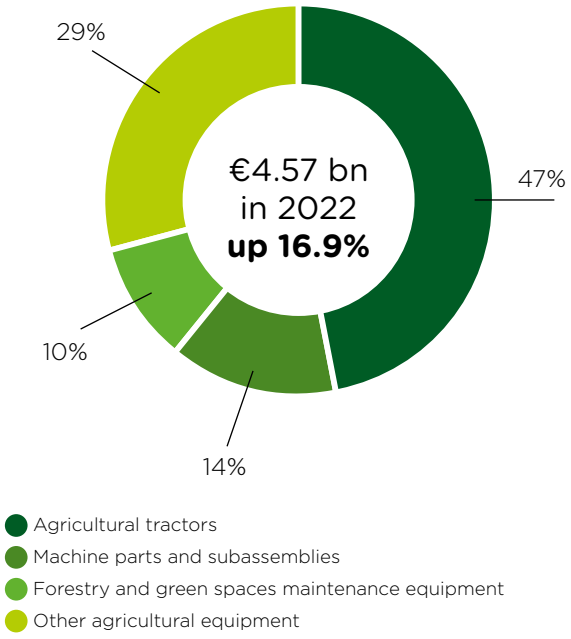
FRENCH EXPORTS OF AGRI-EQUIPMENT IN 2022
• Exports reached a record level of €4.6 Billion

French exports increased by almost 17% in 2022, for the first time exceeding the threshold of €4.5 billion. Exports were driven upwards by machine parts and subassemblies in 2022 (up 31%). In 2022 tractors represented 47% of exports in value. This good overall export performance should not obscure the fact that exports are growing slower than imports, and this has been a structural process for several years. Thus, from 2017 to 2022, exports recorded a 7% annual increase (excluding tractor engines), compared with a 13.3% rise for imports.

France's trade balance has therefore worsened over the past five years. By product, the balance is now only positive for a handful of product families: balers, hay-making equipment, sowing equipment, manure spreaders and equipment for drying, cleaning and sorting agricultural products (included in the other item in the next page). All other families show a deficit, especially tractors, with a negative balance since 2018.

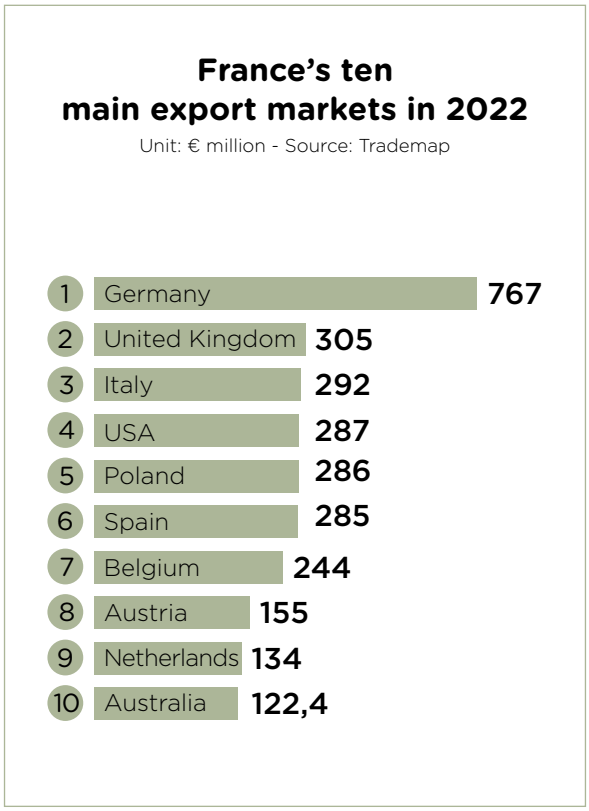
Breakdown of exports by major product family in 2022

%, share of total exports - Source : Trademap



FRANCE EXPORTED TO 167 COUNTRIES IN 2022

While France exported to 167 countries worldwide in 2022, exports remained concentrated: the top ten destinations accounted for 63% of the total. The European Union remains by far the leading outlet for French manufacturers, representing 63.2% of exports in value. This share rose to 79% for Europe as a whole. However, it fell 1.1 points compared to 2021 due to the war in Ukraine, which resulted in a drop in exports to Eastern Europe. Exports to Russia also fell by almost 55% year-on-year, while exports to Ukraine fell by more than 25%. It should be noted that exports to North America rose; this area accounted for 7.7% of French exports in 2022 compared to 6.8% in 2021. This growth was mainly due to increases of 35% and 23% for the American and Canadian markets.



INTERNATIONAL AGRI-EQUIPMENT EXPORTS (2018-2022)

- **France, 5th largest exporter in the world, The United States again in 2nd position**

International agri-equipment exports experienced a particularly dynamic year in 2022. It recorded growth of 21% compared to 2021, exceeding the €80 billion threshold for the first time. This increase came after 21.7% growth in 2021. In two years, international agri-equipment exports therefore rose by 47%. Germany remained the world leader, with exports up 16% to €15.4 billion. Thanks to strong growth of 40% (up 24% excluding the foreign exchange effect), the United States overtook China, whose external trade suffered from the zero-Covid policy. They were followed by Italy (up 12%) and France (up 16%) which, as in 2021, occupied the fourth and fifth places in the ranking.

FRENCH IMPORTS OF AGRI-EQUIPMENT IN 2022

- **Imports soared 20% in 2022, and 50% in two years!**

French imports of agricultural equipment increased by 19.7% in 2022, after a 25.7% rise in 2021. All major product families experienced strong growth. Imports of tractors increased by 20% and accounted for 37% of imports by value in 2022. In the five years from 2017 to 2022, imports rose by 87%, i.e. 13% a year. Many product families saw their imports more than double since 2017: tractors, soil working and sowing equipment, sprayers and fertilisers in particular.

INTERNATIONAL AGRI-EQUIPMENT IMPORTS (2018-2022)

- **France remains the second largest importer, the USA widens the gap**

Agricultural equipment imports recorded an increase of around 6% in value in 2022. Still at the top of the rankings, the United States widened the gap, thanks to an upturn of 47% (up 30% excluding foreign exchange effects) in their agricultural equipment imports in 2022, to €16.8 billion. France remains the second largest importer in the world with a value of €6.8 billion. Notably, Australia is in the top 5, just ahead of the United Kingdom and Russia. The latter, which was the 5th largest importer in 2021, saw its imports collapse, even leaving the top 20 in the rankings. It should also be noted that Brazil (16th) and South Africa (19th) entered the top 20.

While the structure of the global market has changed in a year, it has also become concentrated: the top 10 International importers now account for 58% of international imports, compared to 54% in 2021.

THE OCCITANIE REGION NOTE

OCCITANIA REGIONAL COUNCIL, BY THE SIDES OF FARMERS AND FIRMS TO PREPARE THE FUTURE

CAROLE DELGA
Chairwoman of Occitania / Pyrénées-Méditerranée Regional Council

As the world's leading vineyard for wines under appellation and the leading winegrowing region in France, agriculture and viticulture are essential drivers for the Occitania region.

Bringing together enthusiasts and professionals, SITEVI is a superb two-yearly showcase for our premium productions and know-how. As our region is increasingly exposed to extreme climate events, we must pursue our actions to mitigate the effects of climate change, protect our producers and curb the impact on their production. With the creation of our regional agricultural land fund, the first in France, the deployment of our sustainable agriculture contracts, and the planting of varieties that are resistant to main diseases and drought, we are innovating alongside professionals to transform agricultural practices.

In parallel, we continue to advocate everything "produced in Occitania" through the development of the brand "Sud de France – l'Occitanie", a promotional mechanism which benefits our wine and food producers. The Regional Council remains fully mobilised to defend the know-how and the production of Occitania!

1 A REGIONAL GREEN DEAL

The Regional Green Deal takes things a step further in the aim of introducing a form of agriculture that reconciles profitability and care for the environment. In June this year, new subsidy schemes aimed at supporting investment by farms and agri-food businesses were adopted for the 2023-2027 period.

- The **"one stop" investment subsidy,** available to farms and CUMA groups, addresses the ambitions of the Green Deal and facilitates support for a general development and investment project fulfilling the challenges of competitivity, agroecological transition and adaptation to climate change.

- The "Agro-food Businesses" scheme aims to support Occitania firms wishing to make tangible and intangible asset investments. It is part of the SRDEII (Regional Plan for Economic Development, Innovation and International Expansion) and the Green Deal. They highlight the **issues of energy sobriety, digital transformation, job creation, regional food sovereignty and the adaptation of farming verticals to climate challenges**.

Through these schemes we are supporting an upturn in the activity of businesses and funding actions to promote wine from Occitania, in particular towards export markets.

2 THE REGION, ACTING EVERY DAY FOR THE WINEGROWING SECTOR

Historically, the Occitania Regional Council has deployed a powerful strategy to support the development of the vine and winegrowing sector. Founded on an integrated vision of the sector, from plant breeding to marketing, from local to international, this regional policy revolves around a set of mechanisms combining collective and individual actions.

More than €10 million of support from the Region on average is invested every year in the vine and winegrowing sector.

"Sud de France l'Occitanie" provides a **comprehensive offering** of almost **13,700 products** and nearly **2,000 companies**

3 SUD DE FRANCE-L'OCCITANIE: REGIONAL EXCELLENCE FOR CONSUMERS

Sud de France-l'Occitanie is the regional brand of products from Occitania.

It brings together products from the agricultural, winegrowing and agri-food sectors under a single banner, with a marketing strategy based on collective promotion at local, national and international level.
With a basket of almost 13,700 products and nearly 2,000 companies, the "Sud de France l'Occitanie" regional brand provides a comprehensive offering that is representative of the products produced in the communities of the Occitania region.
A guarantee of local purchasing, this "umbrella brand" enables consumers to clearly identify products from our region's community.
The brand is based on 27 specifications drawn up jointly with each of the industry sectors concerned.
For 17 years, the "Sud de France-l'Occitanie" brand has been our flagship. It raises the profile of our products, our producers and their exceptional expertise far beyond our borders, contributing to the reputation and appeal of our region..

4 THE REGION, WORKING ALONGSIDE FARMS AND COMPANIES TO SUPPORT THEM AND ANTICIPATE THE IMPACT OF CLIMATE CHANGE

As they are regularly affected by intense and repeated climate events, the Occitania Regional Council supports its farmers and anticipates the impact of climate change with:

- Ad hoc financial grants to support downstream structures in the supply chain,
- Support for experimental research to help firms adapt to market needs and expectations from society, and to contribute to the development of sustainable farming and agroecology.
- A plan for the deployment of grape varieties resistant to main diseases (late blight and powdery mildew) and drought,
- Grants for the acquisition of environmentally friendly farming equipment
- The intention to implement, alongside the winegrowing sector, a global strategy to support farms and economic structures in adapting to climate change,
- Support to irrigators in optimising agricultural water management so as to fulfil irrigation needs whilst limiting the impact of this use on the state of the resource.

In addition, the Region and the Adour-Garonne and Rhône-Méditerranée-Corse water authorities are strengthening their partnership by defining the main areas of collaboration and financial support, to reinforce the agro-ecological transition and adaptation to climate change in the Occitanie wine sector.

SITEVI INNOVATION AWARDS 2023

SITEVI Innovation Awards

2023 INNOVATION AWARDS
Trends, innovations and highlights

In its first deliberation, the judges shortlisted 37 entries as nominees. In October it will interview the nominees' representatives, following which the jury will compile the list of winners of gold, silver and bronze medals. And this list will be revealed in November in Montpellier on the first day of SITEVI.

The innovations submitted this year cover a very wide palette of equipment, products and services encompassing all aspects of winegrowing, winemaking and the fruit and olive growing sectors.

The innovations proposed are indicative both of the needs of producers and the changing face of the farming world. Despite this extremely wide-ranging spectrum of needs, we can single out **three major trends from them:**

- The first relates once again this year to **digital technology** and its **applications,**
- The second trend deals with **improving productivity,** while also providing assistance in driving, **comfort,** and more importantly, **safety;**
- The final trend which is taking on increasing importance concerns the **reduction of the environmental footprint** of agricultural activities, and in particular the net zero transition of farming.

1 DIGITAL TECH AND ITS APPLICATIONS

Digital tech is now a firm fixture in the vine-wine and fruit growing sectors, and in particular on equipment and machines. Without digital, many innovations presented this year would not work. But here we have only selected the innovations for which digital tech is the aspect specifically highlighted for these innovations.

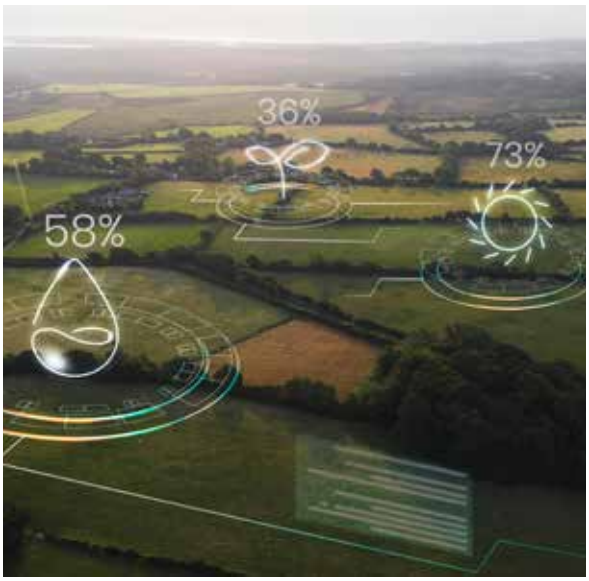
- **Digital technology for monitoring and control of equipment and processes**

Dashboards and dialogue interfaces enable the user to monitor the operation of their equipment or process and, quite often, to coordinate, i.e., activate, certain functions remotely and/or to a schedule. This is the case with the system presented by Winegrid: it monitors remotely and in real time the secondary fermentation of sparkling wines in their bottles or in the vat.

In another area, Netafim proposes its GrowSphere interface which helps to monitor, record and analyse operating data, and execute irrigation and fertigation plans to them in the finest detail.

Finally, with its Co-pilot, Egretier proposes an interface to monitor attachment parameters (depth, for example), memorise settings for each plot, and quickly retrieve the setting of the attachment at the head of each row.

© Anne Bizon



FOLLOWING A 2021 EDITION OF SITEVI THAT WAS STILL REELING FROM THE EFFECTS OF THE COVID EPIDEMIC, THIS 2023 EDITION HAS TURNED OUT TO BE A GOOD VINTAGE. THIS IS EVIDENCED BY THE MULTITUDE OF ENTRIES RECEIVED FOR THE SITEVI INNOVATION AWARDS, 106 IN TOTAL, REPRESENTING AN 80% INCREASE ON 2021.

Agricultural machinery is also incorporating an increasing number of this type of function. For example, the Intelliflow by CNH is an interface to monitor and control the hydraulic functions of winegrowing straddle tractors. This Intelliflow manages the distribution of hydraulic fluid to the attachments to optimise the operation of each attachment and reduce the tractor's energy consumption.

• Digital tech to measure agronomic variables

The development of precision farming, just like its spinoffs, precision fruit farming and precision viticulture, require the acquisition of large quantities of intra-plot data which will be the basis for input modulation.
Consequently, Optima Concept has developed the AFS system (Automatic Foliage Spraying) which helped to determine in each location the presence of vegetation so as to activate or refrain from spraying.

Meanwhile, Kubota France offers the Ais which is a set of sensors (3D cameras) and a computerised data analysis module using artificial intelligence. This Ais measures the variations of foliage volume and therefore automatically adjusts the quantity of treatment product dispensed.

• Digital tech for robotics

The rise of robotics depends upon the ability that the robots must have to analyse their environment: an environment which by its very nature is constantly changing, and is hard to model.
Vitibot proposes a fine plot mapping solution based on their electric inter-vines. The robot will use a rough map drawn up by a manmade survey, and will continuously refine this map during its tasks to function to the best of its abilities.

But the rise of robotics will also depend on the ability of robots to work entirely autonomously. Current regulations require the manufacturers of vineyard robots to plan mechanisms to protect people who may find themselves in the vicinity of the robot's working space, or to recommend to the user that a human supervisor be allocated to the robot to guarantee this protection.

Pellenc has developed the robot RX20-H, which is a hybrid powered inter-row vineyard robot. It has been designed with a geofencing system and safety sensors which make it possible to dispense with human supervision.

Another way of addressing this problem of safety and supervision is proposed by Sabi Agri with its "Robotic Harmony". Here, the supervisor is behind the wheel of a Sabi Agri electric tractor, and the robot Zilus works in concert with this tractor. The work rate is therefore doubled, while fulfilling safety requirements. .

• Digital tech for communication and training

Among the solutions that digital technology offers, there are an increasing number of tools for use by communication and to connect people. The application "Dans les bottes" proposed by "Thierry Agriculteur d'Aujourd'hui" aims to give the general public a better idea of the reality of the farming and winegrowing world through social connection functions, visiting appointments, etc. between farmers and city dwellers.

Digital tech also demonstrated its assets (and limitations) during the Covid epidemic by enabling academic institutions to continue delivering their courses. But digital tech can also change the way learning is designed, and more specifically, digital simulation can help students acquire the techniques in a virtual setting, before putting them into practice on real objects. This saves both money and time, but also reduces risk: it's better to learn to drive a €500,000 machine virtually first – and have virtual accidents – than by starting on a real machine and wrecking it.

It is on this pedagogical principle that Studio Nyx offers Ampléos, a vine pruning simulator which helps to instil the right techniques and avoid poor posture, and also simulates the effect of on the vine of the virtual pruning and stripping performed through the modelling of vine growth.

But while digital technology can be a very useful tool to learn technical movements, it is however unsuitable for certain types of learning. And for senses such as taste or smell, nothing beats practising on real objects.
This is why the IFV offers a mousiness detecting kit aimed at sector professionals.

2023 INNOVATION AWARDS
Trends, innovations and highlights

2 ASSISTANCE WITH DRIVING, COMFORT, PRODUCTIVITY AND SAFETY

For many years, seeking to improve productivity was the driver of innovation. But nowadays we are witnessing a noteworthy change, one which associates productivity on the one hand, and worker comfort and safety on the other.

Most innovations submitted in this section have similar characteristics: they enable an increase in productivity but without endangering the health of operators, or even improving their working conditions or safety.

• Working assistance and quality of operations and products

In this section we will find innovations that provide working assistance by enabling operators to save time and enjoy better working conditions, while maintaining or improving the quality of work or products.

First of all, in the domain of transferring liquid or solid materials in the winery (musts, wines, marc), we have two innovations: Cefinox with the ML system, and Tandem Process Partner with the TSV system. These are systems that use vacuum suction for vat filling and emptying and racking, avoiding the use of pumps while respecting product quality.

Meanwhile, the ICV has developed Dyna Wine, a spiral vortexer connected with a nano-oxygenation system, which enables oenological inputs to be incorporated quickly and very evenly, and also manages dissolved gases.

Pellenc, with its Air3 pneumatic olive and almond conveying system, offers a solution that combines high productivity and fruit quality preservation.

• Working assistance and driving comfort

In vineyard work, productivity depends on speed of work in the rows, and also in the turnaround at the end of the row. Innovations in this area seek to help the driver perform high quality work while preserving the vines.

In this section, we discover the Acolyte 3 by Boisselet, a straddle chassis which facilitates the use of inter-vine attachments, and the Intercep Para-Pivot by Ferrand which offers a dual retraction security system that allows for weeding very close to the vine in total safety.

But working assistance can apply to other winegrowing operations. For example, Vignetinox offers row-end posts fitted with an anchoring system that allows farmers to do away with row-end post anchors, and therefore save time when planting and making it easier to manoeuvre at the end of the row.

• Comfort and safety

Increasing productivity entails additional risks for users, whether in terms of safety or in terms of MSDs (musculoskeletal disorders). Several innovations aim to reduce these specific risks without harming productivity.

CNH presents the Comfort Ride cabin, which is a suspended cab for narrow straddle tractors which significantly improves driver comfort.
Similarly, Berthoud presents two innovations to make a driver's spraying operations simpler and safer. On the one hand, the X'Pulse, a blower system to remove plant waste from the recovery panels, enabling the operator to clean them without exposure to the product used. On the other, the Azimut, which automatically cuts off the sprayer on leaving the row and starts it again when entering the next one.

Controling waste, **saving** resources, **reducing** pollution and **recycling** products.

But seeking to improve productivity can sometimes endanger operators. BM emballage therefore offers an automatic vine grafting machine fitted with safety devices to prevent cuts and injuries.

In the same way, Mage Application offers an anti-mutilation pruner which detects the no-go zone defined by a bracelet worn on the wrist of the free hand. The pruner cannot be operated in this zone. Still in the area of electric secateurs and battery-operated portable equipment, we are seeing a large increase in the use of these tools. But new uses entail new risks. This is why Pellenc has invented the Sécurion cabinet which charges batteries but most importantly protects premises from the risk of explosion of these batteries and from fires which are hard to control.

3 ENVIRONMENTAL IMPACT AND NET ZERO TRANSITION OF FARMING

Agriculture in general and wine and fruit growing in particular are highly impacted by the effects of climate change. Combating these effects is essential, and a range of innovations are helping to do this. But it is not enough, and we must also try to reduce the impact of farming activities which contribute to this climate change. This is a recent trend, but one which is growing in importance at this new edition of SITEVI. Other innovations, meanwhile, look to reduce the impact of production activities on the environment by controlling waste, saving resources (water and energy), reducing pollution and recycling products.

• Combating the effects of climate change

A range of solutions are already well known such as agrivoltaics, wind towers or hail protection nets; true innovation is hard to find in this area. This is why the jury has only shortlisted one of the entries received: that of Netafim which offers a nozzle that sprays crops to combat spring frost. This nozzle protects the row better from frost while not watering between rows, resulting in a 50% water savings.

• Reducing environmental impact

In this section we can find tools for agroecology such as the Green Manager winegrowing seed drill by Güttler. This attachment can undercut, direct drill and destroy plant cover.
This impact reduction also involves cutting the use of chemical products, and in this category we have the Exployo Vit by Syngenta which is a mating disruptor to fight vine moth.
We also have the intense pulsed light wooden barrel decontamination device, invented by Bacchustorm.
In this logic of physical treatment for decontamination, we also have Amorim which presents its Naturity anti-TCA cork treatment process.

Reducing environmental impact additionally means reducing waste and encouraging recycling. In this area, Bucher Vaslin presents its versatile Flavy X-treme filter for use on wine, sludge and lees.

Modico presents a UV bottle printing process which makes it possible to decorate the whole bottle without using sleeves, and improves recyclability due to the ink burning away during recycling and not leaving any residue.
And finally, Ramondin offers an entirely recyclable aluminium capsule containing zero plastic.

• Decarbonisation of farming

Due to the photosynthesis of plants as they grow, farming does not have a very large carbon footprint. But this does not mean that efforts should not continue to be made to improve this footprint and even become carbon positive.

One of the avenues to investigate is to do without fossil fuels to power tractors and agricultural machines. An increasing number of tractors and agricultural robots are fully electric, and operate using rechargeable battery packs. Working time is limited to approximately one working day. An intermediate solution is the diesel-electric hybrid version, increasing working time but without meeting this decarbonisation goal.

Another option is possible: that of hydrogen used in fuel cells, a solution which additionally can make use of the photovoltaic systems present on some farms. This is what Exxact Robotics proposes with its Traxx concept H2 vineyard robot, capable of running solely on hydrogen and offering a working time in excess of a day.

2023 INNOVATION AWARDS
Trends, innovations and highlights

This transition towards electric consequently leads to the obsolescence of a whole array of attachments that work suing small hydraulic motors. Hydrokit offers an electrification kit to make these attachments compatible with electric power sources on tractors and electric robots.
For its part, Pellenc revisits air-jet spraying technology by offering electric spraying micro-turbines which make it possible to independently vary product flow rate and air speed.

Another way of contributing to the decarbonisation of winegrowing is to recycle the carbon dioxide from fermentation. Various processes are already on the market, but the company SIPREM INTERNATIONAL offers an innovative and simple system to directly reuse carbon dioxide as an inert gas in the press.

The wine, olive and fruit growing sectors are facing many challenges: climate change, the agroecological transition, changing market demand and new expectations from society. Innovation is the first lever through which to adapt and prepare the future of these sectors, to guarantee the sustainability and viability of winegrowing businesses. The sectors' support for CSR initiatives is also a way of successfully fulfilling expectations from society.

The roll of honour of the SITEVI Innovation Awards pays tribute to the vitality of innovation specifically focussing on these challenges and on the economic performance of the sectors' players. The 2023 edition offers us particularly valuable insights through three major trends:

- **Digital applications** bring solutions at each stage of the production cycle, thus improving the management, precision and control of processes in the orchard, the vineyard and the winery, and guaranteeing productivity and product quality. Robotics is also continuing to develop across all production applications and activities. The arrival of artificial intelligence through dedicated applications, in particular for learning and expert training systems, is also a standout development.

- The continued eagerness of equipment manufacturers to combine **productivity** with operator **comfort** and **health** is a permanent trend that contributes to making our professions attractive so that we can renew the workforce with the younger generations, which is so vital for the future of French crop production.

- The **mitigation** of **climate change** is an essential commitment and a necessary effort that must be made by everyone. Low carbon greenhouse gas emission reduction strategies, together with the development of carbon sequestration in soil, lie at the heart of the sectors' endeavours in aid of the environment. The innovations also reflect the development of solutions based on the circular economy, recycling and machine electrification.

THE NOMINEES
of the SITEVI Innovation Awards 2023

	Company nominees	Innovation
Digital tech and its applications	Egretier Jean Michel Sarl	Le Copilote: Using artificial intelligence to work the soil
	Institut Francais de la Vigne et du Vin	Les Sensorielles: 'Mouse Taste' in Wine Recognition Set
	Kubota Europe	AIs: Specialist crops agronomy AI& amp digital management
	Netafim France	GrowSphere™: Irrigation and fertigation operating system
	New Holland	INTELLIFLOW
	Optima Concept	AFS option- Automatic foliage detection
	Pellenc	RX20-H
	Sabi Agri	L'Accord Robotique: Collaborative robotics fleet
	Studio Nyx & Consortium Vinum	Ampélos: Digital training in vine pruning
	Thierry Agriculteur d'Aujourd'hui	Dans Les Bottes: Mobile application
	VitiBot	Automatic mapping of vine rows to electric vines.
	Watgrid SA	Real-time remote monitoring solution for the production of sparkling wines
Assistance with driving, comfort, productivity and safety	Berthoud	X'Pulse: Plant debris blowing system for recovery panels on vineyard sprayers
	BM Emballage	BM GO (BM Greffe Omega): Vine grafting machine
	Boisselet	ACOLYTE III: Towed high-clearance frame
	Cefinox	ML: Transfer system
	Ferrand	Intercep Para-Pivot: Intercep with parallelogram retraction combined with pivot safety device
	ICV	DYNA WINE®: Helical vortexer paired to a nanobubling system
	Mage Application	SAM35 - SAM45: Anti mutilation pruner
	New Holland	Comfort Ride™
	Nicolas Sprayers	Azimut: Automatic spray cut-off system for tree sprayers
	Pellenc	AIR 3: Pneumatic conveyor
	Pellenc	SECURION: Fire load cabinet
	Tandem Process Partner	TSV: Transfer by a vaccum suction system
	Vignetinox	PALO INFINITY CON PINNA: Infinity post with fins
Environmental impact and net zero transition of farming	Amorim France Sas	Naturity
	Bacchustorm	Pulsed light decontamination device for containers
	Bucher Vaslin	Flavy X-Treme: X-Treme 3 en 1
	Exxact Robotics	TRAXX Concept H2: Autonomous vineyard straddler
	Güttler	GreenManager® Güttler®: Vineyard seed drill
	Hydrokit - Vensys Group	Electrification VITI: Electrification of vine-growing tools mounted on robots, carriers or tractors powered by electricity
	Modico	LSINC Perivallo360m: Bottles seamlessly printed all over with the LSINC Perivallo360m printing system
	Netafim France	PULSAR™ + STRIPNET™ X
	Pellenc	E-Sprayer
	Ramondin	e-CAP: 100% recyclable capsules
	Siprem International SPA	Exploitation of fermentation gas in grapes pressing
	Syngenta France SA	EXPLOYO Vit

SITEVI INNOVATION AWARDS 2023

EGRETIER JEAN MICHEL SARL (FRANCE)

Using artificial intelligence to work the soil

Le Copilote

Thanks to an HMI (Human Machine Interface) screen located inside the tractor cab, the user will be able to control various functions of the tool (width, depth, etc.) used to work between the rows of crops (vines, etc.) without having to get out of the tractor. He will also be able to record the settings according to the plot, and will have feedback, for example in the event of a breakdown; this will save time and reduce drudgery. The user will play an active role in providing the **"Copilot"** with the information and settings it needs to work properly, and will also be a partner of the 'Copilot', which will provide real-time information on the positioning of the tool and the tractor in relation to the row, as well as visual feedback on information from the field. The 'Copilot' screen means that users no longer have to contort their bodies to see where their equipment is positioned. With the Copilot, you'll be able to work the soil in a way that's never been done before! Thanks to direct feedback to the cab on working widths, heights, depths and, above all, the sensitivity and density of the soil. The user sets the parameters from the touch panel, and the equipment adapts and informs the user in real time. Previously reserved for harvesting or treatment equipment, here at last is a user-machine interface with two-way information transfer.

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INSTITUT FRANCAIS DE LA VIGNE ET DU VIN (FRANCE)

"Mouse Taste" in Wine Recognition Set

Les Sensorielles

Learn how to recognise the "taste of mice" in wines Mouse taste is an olfactory defect in wine that cannot be detected by the nose. It has reappeared in recent years with the reduction in the use of sulphur in winemaking. Three molecules from the pyridine chemical family have been identified as being responsible. What is striking is that the range of aromas described for this defect is very broad, from popcorn to rodent urine (hence the name), via sausage skin. This great diversity of descriptions is explained above all by the wide variation in tasters' ability to detect it. Not all tasters are equal when it comes to this aromatic deviation, since the pH of saliva affects the perception of the defect. But pH varies from one individual to another! All this contributes to a cruel lack of consensus in identifying the taste of mouse, which has an impact on the way the wine industry deals with the defect. To remedy this, the Vertou unit of the IFV's Val de Loire-Centre Pole has created an educational kit to enable wine industry professionals to practise recognising the taste of mice in their perception of wine.

The kit consists of three wines with the mouse taste defect, a sample of aroma that comes close to the mouse taste and a tube of sodium bicarbonate that can be used to reveal the defect if there is any doubt in a wine.

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KUBOTA EUROPE (FRANCE)

Specialist crops agronomy AI& amp digital management

AIs

AIs is an innovative and comprehensive agronomic solution based on vision and artificial intelligence (AI). The AIs system can 'see' crops by capturing images using 3D cameras and processing them using AI. The precision of the data generated from the visual information makes it possible to monitor the condition of plantations in the field in real time and carry out high-precision treatments and tasks in the field. AI saves up to 40% in pesticide use when spraying with Kubota H3O sprayers. The technology also delivers significant additional savings through reduced fuel, water and fertiliser consumption.

This innovation opens up a new era in the specialised crop sector for commercial, agronomic and business management. AI makes it possible to integrate digital decision support system services and other service providers on the same platform, so the visual data recorded by AI will be available for third parties to offer their products.

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NETAFIM FRANCE (FRANCE)

Irrigation and fertigation operating system

GrowSphere™

The GrowSphere™ Irrigation and Fertigation Operating System (OS) is a revolutionary solution designed to optimise irrigation and fertigation operations in agriculture. It is a comprehensive system that combines cutting-edge technology, data analytics and automation to maximise crop yields, minimise wasted resources and improve overall farm efficiency. GrowSphere™ not only integrates hydraulic, operational and agronomic capabilities into a single operating system, but also serves as an all-in-one platform for farmers. By offering a complete solution and eliminating the need for multiple tools, GrowSphere™ simplifies operations, improves efficiency and delivers better results. These unique qualities and its ability to consolidate various functionalities contribute to the system's innovative character and originality on the market.
The GrowSphere™ irrigation and fertigation system represents a revolutionary innovation in agriculture. With its cutting-edge technology, data-driven information and user-centric approach, the system is revolutionising the way farmers manage irrigation and fertigation processes. By optimising crop yields, resource efficiency and environmental sustainability, GrowSphere™ is helping to transform modern farming practices.

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NEW HOLLAND (FRANCE)
INTELLIFLOW

INTELLIFLOW is an exclusive hydraulic system developed for New Holland high-clearance tractors. The system intelligently manages hydraulic distribution to all implements connected to this tractor through IntelliView™ IV Plus, the connected and intelligent part of the machine.
A Load Sensing dual pump system intelligently distributes and operates the power required for each implement, adapting to the weight of each implement and their respective working speed, while consuming as little energy as possible.

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OPTIMA CONCEPT (FRANCE)
AFS option- Automatic foliage detection

The **AFS** system is designed for spraying work in the wine industry. Its principle is to detect in real time the presence of vegetation in front of the nozzle in order to authorise it to spray. The AFS manages the opening and closing of the nozzles according to the bodies detected by the ultrasonic sensors. This technological advance, which is a continuation of nozzle-based dose modulation, allows you to optimise inputs and yields and apply the right dose at the right pressure. This option controls nozzle management.

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PELLENC (FRANCE)

RX20-H

RX20-H, the PELLENC robotic solution, is an autonomous, electrically-powered inter-row crawler designed to improve economic efficiency and provide greater comfort for vine growers. It can be integrated into the technical itinerary of a farm or a CUMA, and quickly pays for itself.

Equipped with a tool-carrying chassis and a shredder, the RX20-H maintains virtually the entire row and inter-row of vines. The tools are powered hydraulically or electrically.

Lightweight and compact, it's easy to transport. Designed on caterpillar tracks, it considerably reduces soil compaction and can be used quickly in wet soil conditions. The long-term aim is to extend the range of uses with a complete range of tools.

Economical: its hybrid energy system and electric drive consume 4 to 5 times less fuel than a conventional solution. It has a range of 13 to 20 hours. Able to work day and night without human supervision, it optimises time management, particularly during peaks in activity.

Eco-efficient by design and in use, RX20-H helps to reduce the carbon footprint of operations and is over 90% recyclable. Autonomous and secure, its 4 360° vision cameras, Safencing Agreenculture® system and various sensors monitor the state of the machine, the operation of the tool and the work being done.

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SABI AGRI (FRANCE)

Collaborative robotics fleet

L'Accord Robotique

SABI AGRI is launching the first collaborative robotic fleet to optimise and increase work rates in the vineyard. To achieve this, the ALPO electric tractor and the ZILUS all-terrain robot are joining forces.
This 100% electric tandem works harder, with greater precision, for all soil work and vine maintenance. They can work together or separately! Thanks to its caterpillar tracks, the ZILUS all-terrain robot is capable of operating on the most difficult terrain! It has 4 driving modes: autonomous, with a remote control, with a removable seat or with a robotic agreement, making it the most versatile robot on the market! This unique robotic agreement opens up new prospects for work that is committed to preserving the soil and respecting the environment and human beings.

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STUDIO NYX & CONSORTIUM VINUM (FRANCE)

Digital training in vine pruning

Ampélos

Ampélos is the new digital vine pruning training service for schools and businesses. It provides training in pruning by fully immersing the user in a realistic 3D environment.
The project is being piloted by the VINUM programme initiated by Studio Nyx and supported by the UNIT foundation. The VINUM programme brings together around fifty public and private partners.
The aim of the project is to train novice pruners and improve the skills of professional pruners in «virtuous» pruning, freeing them from seasonal constraints. **It is therefore aimed at vineyard managers and their employees, as well as training centres:**

- Offering educational content to give a better understanding of the effects of wood diseases on vines and the consequences of virtuous pruning practices.
- Offer practical work in the form of an immersive virtual reality experience, based on rules defined by master pruners and tried and tested in the field.
- Health is also a key issue: vine growers are highly exposed to musculoskeletal disorders. Pruning training will enable them to adopt better posture, as well as enhancing the expertise and self-perception of the pruner.
- As well as providing training, Ampélos is also a way of communicating with young people about the attractiveness of occupations in the wine industry that are in short supply.

Presented on a stand shared with Credit Agricole Languedoc.

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THIERRY AGRICULTEUR D'AUJOURD'HUI (FRANCE)

Mobile application

Dans Les Bottes

Dans les **BOTTES**

Faced with a growing lack of understanding of the farming profession, it is essential to re-establish a link between the farming world and the general public. These passionate farmers want to share their vision of agriculture in all its aspects. Agritourism must meet the new expectations of people who are curious to immerse themselves in farming practices. The immersive experience between direct sales and accommodation is still under-exploited.

Our **"Dans les Bottes"** solution offers the concept of the "Airbnb of the farm experience". It's an innovative platform that allows farmers to open up their farms and share their fascinating profession through unique experiences. Thanks to an interactive map, a chat system, online booking and payment, they can easily manage their offers, reaching a curious public in a fun and educational way. By fostering human links, this solution also offers the opportunity to diversify and potentially generate significant additional income. It reconnects those who produce with those who consume.

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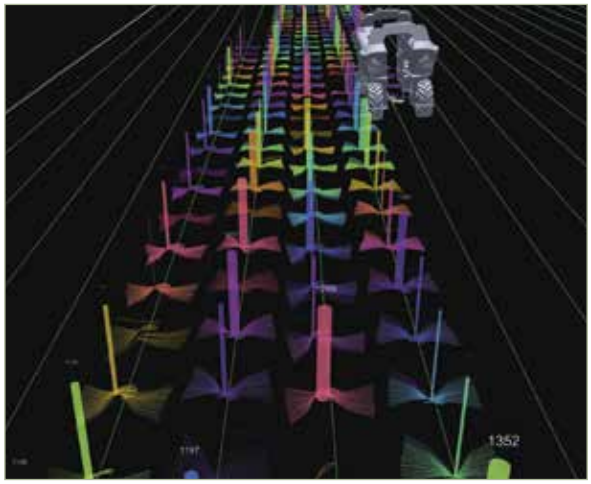
VITIBOT (FRANCE)

Automatic mapping of vine rows to electric vines



VitiBot is innovating by using its electric inter-row technology, coupled with advanced algorithms, to enable detailed, automatic mapping of vineyards with an autonomous machine.

Very detailed knowledge of the rows of vines is essential for an autonomous machine to be able to cover the plots correctly. By using electric interceps, the information gathered during the various passes increases the precision of navigation, the detection of the presence of vines and the evolution of the plot. Mapping is a subject that has received very little attention because it is specific to winegrowing, but this innovation takes it to a whole new level. It's less time-consuming, much more reliable (centimetre accuracy for each vine), can be fine-tuned with each pass, and provides real-time feedback and data processing. It's a revolution for any winegrower who wants to monitor the development of his vines and operate them with an autonomous machine, with precision that preserves the integrity of his plot.

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WATGRID SA (PORTUGAL)

Real-time remote monitoring solution for the production of sparkling wines

The Foam Intake Monitoring System is a remote, real-time digital solution for monitoring sparkling wine production. It includes the e-aphrom, developed for the méthode Champenoise in bottle, and the e-charmat, designed for the méthode Charmat in vat. Until now, monitoring the setting of foam was mainly a manual, reactive and time-consuming process, using analogue aphrometers, on-site observation and manual recording. With WINEGRID, it becomes a remote, real-time, proactive and predictive process. The e-aphrom monitors the pressure, temperature and handling of the bottle by the user, while the e-charmat monitors changes in pressure inside the tank. The WINEGRID system digitises this winemaking process, making the data available on the WINEGRID Dashboard (web platform) where the winemaker can monitor the process at any time and in any place. The ability to monitor these settings, combined with the ability to track the evolution of the process over time, thus acquires an important dimension and advantage in establishing and controlling the relationship between the data obtained during the process and the organoleptic characteristics of the final product. This solution enables greater operational efficiency, reduces exposure to the risk of explosion and avoids pressure fluctuations in order to achieve consistent perlage and preserve the quality of the wine.

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BERTHOUD (FRANCE)

Plant debris blowing system for recovery panels on vineyard sprayers

X'Pulse

X'Pulse is the self-cleaning system for the K'Air Drive recovery panels developed by Berthoud for its new range of Katch sprayers. This system blows away any plant debris (leaves, flower caps, etc.) that may accumulate on the grid of the recovery trays during spraying. This eliminates the need for the driver to get out of the tractor during spraying to clean the grids of the collection trays, thereby reducing his exposure to plant protection products. The X'Pulse system offers greater safety, working comfort and productivity.
The air is blown through a blade of air that sweeps across the grille at the top of the recovery bins. The air is supplied by the fan feeding each panel: in spraying mode, the air is directed towards the diffusers, while in cleaning mode, a valve system redirects the air towards the bottom of the panel for blowing. The X'Pulse system can be activated automatically during U-turns or controlled manually by the operator from the driving position.

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BM EMBALLAGE (FRANCE)

Vine grafting machine

BM GO (BM Greffe Omega)

BM emballage is revolutionising the wine industry with its new grafting machine, the BM GO. This innovation guarantees consistent, safe and efficient grafting, while protecting the operators. The BM GO detects when the operator's gloves come into contact with the blade, thereby preventing injury. Its electric control system eliminates repetitive movements, ensuring optimum working comfort (no more RSI) and consistent graft quality.
Its low noise level makes the work less arduous. The BM GO also features online reporting tools for tracking production and monitoring wear and tear on mechanical parts. Compact and easy to install, it represents a major advance in the field. It allows experienced operators to return to this essential task, while attracting a non-experienced audience to ensure continuity of production.

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BOISSELET (FRANCE)

Towed high-clearance frame

ACOLYTE III

BOISSELET has been offering reliable, high-performance tools for more than 70 years that meet the expectations of vine growers carrying out mechanical maintenance of the soil. To perform the quality of the work delivered by its intervine tools in wide vines, BOISSELET has designed and offered for nearly 20 years a towed straddle frame. After the Acolyte 150 and 150+ versions, Acolyte III was designed taking into account the difficulties of recruiting experienced tractor drivers. Based on the experience of the last 20 years of service, customer feedback expressed a need to facilitate the management of working depth and soil monitoring. The design of the tool holder part has been completely revised to optimize the quality of the work done while facilitating the use of this chassis. Acolyte III now perfectly meets customer expectations by offering a chassis that is easy to use, reassuring and secure for its user.

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CEFINOX (FRANCE)

Transfer system

ML

With the passage of time and his 20 years' experience, **"ML"** was born in Cetinox's mind as a result of a certain number of limitations present in the cellars and which are more and more constraints on the smooth running of oenological operations (vatting, pumping-over, devatting). In fact, a number of points will be increasingly decisive in the future, with a shortage of labour, ever stricter safety standards, a desire to move towards CSR practices (production standards in the coming years) and the main objective of maintaining harvest quality (for precision oenology) from arrival at the winery to the end of the winemaking flow.

For these reasons, CEFINOX wanted to bring these issues together (including the hygiene constraint) and have developed a system for the complete transfer of fermented, destemmed and liquid-filled grapes.

The "ML" system brings together the following points:

- A technological break with existing practices
- No consumables
- Full respect for the product
- No mechanical stress
- Little wear and tear
- Tubing can be sealed to avoid the risk of oxidation if necessary
- Compressed air supply (approx. 1600 L/min required)
- Hygiene with easy cleaning and more than 50% less washing water required
- Cleaning time divided by 6, as each element can be dismantled without tools
- Simplified emptying of product tubes using alternating pressure/vacuum

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FERRAND (FRANCE)

Intercep with parallelogram retraction combined with pivot safety device

Intercep Para-Pivot

Ferrand, one of the world leaders in under-row tillage, is offering a new **Para-Pivot intercep.** This intercep combines the two essential functions for working tools under the row: folding by pivot and/or by parallelogram. The combination of these two movements makes it possible to use a blade, for example, with pivot folding or a mower with parallelogram retraction. The important point, which has been patented, is when using a parallelogram mower, but we have added a pivot safety device if the driver deviates from the driving line or if the planting width narrows in the row.

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ICV (FRANCE)

Helical vortexer paired to a nanobubling system

DYNA WINE®

DYNA WINE® embodies an unprecedented innovation to meet the challenges of contemporary oenology. In winemaking, the integration of oenological inputs is often hampered by homogenisation problems, leading to overdosing and imperfect control of the supply of oxygen or 'protective' gases such as nitrogen.
DYNA WINE® is a helical vortexer coupled to a nanobullage system. Its principle is to create a vortex just as the components are being added, to ensure that the mixture is as homogeneous as possible. It is the liquid itself that generates its own vortex by its speed when it meets the helicoidal metal part.
The must or wine is circulated inside a closed tube at the centre of which is a helicoidal metal part, so as to mix it with any product introduced upstream, by the venturi effect or by forced injection.
The device consumes no energy. It is the transfer speed of the liquid during pumping that ensures the vortex movement.
This vortexer was developed by Dyna Wine Sarl, in collaboration with Changins University, and co-financed by InnoSuisse. It is distributed in France by the ICV Group.

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MAGE APPLICATION (FRANCE)

Anti mutilation pruner

SAM35 - SAM45

The SAM35 and SAM45 pruning shears for wood with diameters of up to 35mm and 45mm respectively feature a protection system that detects the presence of a hand in the vicinity of the cutting blade. If the hand enters the protection zone, the tool goes into safety by opening the blades and stops working as long as the hand remains in the protection zone. The minimum and maximum distance from the protection zone can be set using a smartphone.

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NEW HOLLAND (FRANCE)

Comfort Ride™

The Comfort Ride™ suspended cab is the first cab suspension designed to equip vineyard tractors (overall width 1.06 m). The system consists of combining the Panhard concept with hydraulic shock absorbers and a pneumatic cushion located at the rear of the cab of narrow vineyard tractors T4V and T4N, with no impact on the overall width of the tractor (1.06 m). The result is a reduction in vibrations and therefore an improvement in driver comfort.

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NICOLAS SPRAYERS (FRANCE)

Automatic spray cut-off system for tree sprayers

Azimut

Azimut is an automatic section cutting system for Nicolas tree sprayers. It automates the opening and closing of the spray when turning at the ends of rows. The system uses a magnetic compass to measure the angle between the axis of movement of the sprayer and the axis of the tree rows in the orchard. At the end of the row, when it turns, the sprayer moves away from the axis of the rows, causing spraying to stop, and vice versa at the beginning of the row. The Azimut system makes it possible to improve both application precision and working comfort, as the driver no longer has to concentrate solely on driving.
The Azimut system is a section-cutting solution that is unique on the market. Simple and economical, this technology requires neither plot mapping nor RTK GPS subscription. Azimut can be fitted to new equipment or retrofitted to most models of Nicolas orchard sprayers.

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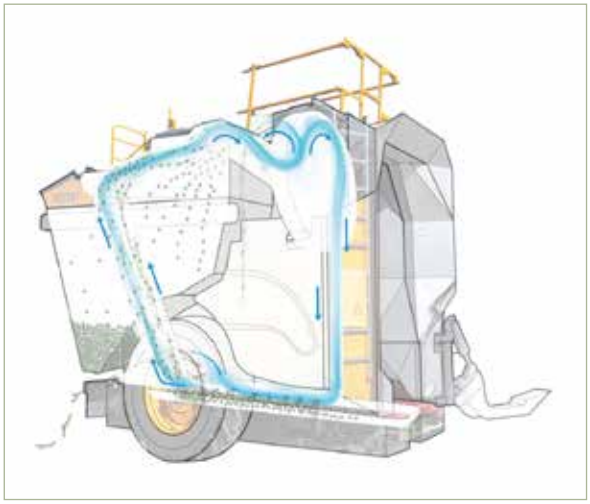
PELLENC (FRANCE)

Pneumatic conveyor

AIR 3



PELLENC has developed a pneumatic conveyor system for the CV 45 towed machine, specially designed for harvesting olives and almonds in fruit hedges: the AIR 3 Pneumatic Conveyor. The aim of this innovative system is to offer an efficient process and device for sorting the berry harvest, making it possible to convey and receive the crop, as well as sorting the waste. **This technology offers 4 major innovative advantages:**

- **Preservation of quality:** the fruit moves solely via a flow of air and is therefore not damaged by any impact or friction associated with the use of a conventional conveyor.
- **Clean harvest:** a pneumatic sorting device extracts the leaves via turbines located on the upper part of the machine. The air flow is then reused and takes branches, leaves and other residues to the lower part of the machine, where they are ejected.
- **Reduced maintenance costs:** with pneumatic conveying, the crop is moved by a flow of air, so there are no wearing parts to worry about and no major maintenance operations.
- **Productivity gains:** the pneumatic conveying system makes it easier to absorb high yields (up to 25 tonnes per hectare) while cleaning the crop. [up to 4 km/h for olives and up to 6 km/h for almonds.

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PELLENC (FRANCE)

Fire load cabinet

SECURION

The batteries charged in complete safety. With the new **SECURION** range of charging and storage cabinets, PELLENC is reinforcing its position as leader in battery systems for landscape professionals and local authorities. SECURION protects batteries during charging and storage areas in the event of fire. SECURION is a type F90 fireproof storage cabinet, specially developed for charging PELLENC lithium-ion batteries but also for charging other equipment. Available in M and XL models, they can store up to 40 batteries. All SECURION models are compatible with the CHARGING STATION, so you can combine fireproof storage with management of your PELLENC batteries.

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TANDEM PROCESS PARTNER (FRANCE)

Transfer by a vaccum suction system.

TSV

A vacuum suction transfer system, the **TSV** developed by Tandem Process Partner (T2P) is an alternative to existing pumping equipment, making it possible to transfer must, wine or even fresh grapes without the wine coming into contact with the pumping elements. The development of this system has been accompanied by the integration of inert gas into the supply circuit. The TSV system comprises at least a vacuum pump, a vacuum tank with a volume to be defined according to use, and optional inert gas supply points. The containers (tank, barrel) upstream and downstream of the system are those normally available in the winery.
The TSV system can be fully automated.
The safety of the TSV system is illustrated here by the testimony of Bénigne de Surrel from Domaine Rebourseau, who has used it on several occasions to rack wines from barrels and transfer them to the upper level for bottling. *"... Unable to use the relief to create a gravity system, we used this principle to move the wines while controlling their oxygenation perfectly (closed circuit under Ar or N+ CO2) ... The result is pumping over without oxygenation, and without loss of aromatic profile. The result is in line with barrel tasting".*

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VIGNETINOX (ITALY)

Infinity post with fins

PALO INFINITY CON PINNA

The INFINITY post, patented and manufactured by Mollificio Bortolussi SRL entirely in Italy, is a closed profile post, very strong and with anti-torsion properties thanks to its special shape. Available in hot galvanised and corten-steel, in different thicknesses, it is the perfect end post to give support and strength to the entire vineyard.

The innovation we now propose, with the **"PINNA",** is the use of two pairs of fins, to give to the INFINITY post even more stability. In this way, vine growers can install their vineyard without the use of anchoring systems (anchors, ropes, tie rods). For the same final total cost between the two options, the finned post system saves space in the field, so that it can be better utilised both with a greater number of plants per row and for easier manoeuvring of tractors and machines. With the finned post system, time and labour is also saved in the installation of the vineyard: indeed, the anchoring system will be inserted during the planting of the post, without having to install the anchoring system at a different time. This saves time and, therefore, money.

Finally, risks regarding shearing of the tie rods or ropes during machine manoeuvres are eliminated. The INFINITY post from VIGNETINOX, together with the fins and the three-dimensional anti-sinking plate, provides the winegrower with a perfect end post to support the entire vineyard on its own.

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AMORIM FRANCE SAS (FRANCE)

Naturity

Natural cork stoppers are now even better thanks to **Naturity®,** the world's most innovative anti-TCA technology: to offer the highest quality cork with greater sensory homogeneity. Natural cork stoppers, tubed from the bark of the cork oak tree, are recognised as the best option for preserving wines. For centuries they have accompanied the work of the greatest winemakers. Naturity® is a cutting-edge technology that eliminates TCA and over 150 other molecules from cork, without affecting its physical and mechanical qualities. Naturity® is a totally natural process for the most natural cork.

Launched simultaneously in France and internationally, Naturity provides the best performance in terms of non-detectable TCA, while complementing NDTech technology (NDTech is AMORIM's cutting-edge screening technology that guarantees 100% TCA-free corks, thanks to the individual analysis of each cork and the elimination of any cork containing more than 0.5 ng of TCA per litre).

Contact : M. Franck AUTARD
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BACCHUSTORM (FRANCE)

Pulsed light decontamination device for containers

Bacchustorm offers a pulsed-light decontamination system for wine barrels, casks and vats. The system is totally ecological, with no chemicals, sulphur or mercury. After more than two years of microbiological and technical studies, the patent for this device was filed in November 2022. This innovation makes it possible to effectively decontamination containers against Brettanomyces while limiting water and electricity consumption and avoiding the use of chemicals. The system consists of two parts: a control system on wheels powered by 220 V and a decontamination gun fitted with all the protection systems.
It's easy for operators to use, and already available on the market!

Contact : Ms. Janyce FRANC
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BUCHER VASLIN (FRANCE)

X-treme 3-in-1

Flavy X-Treme

Bucher Vaslin is renowned in the wine industry for its constant drive for innovation. With the **Flavy X-Treme** range, a milestone has already been reached by making it possible to filter both wine and lees: the 2-in-1 filter. To make it even more versatile, Bucher Vaslin is developing the Flavy X-Treme 3-in-1 filter, which will become the essential filtration tool for all products in the cellar: wine, must and lees (fermentation lees and fining lees).
This innovation will give private wineries and cooperatives easier access to this technology, with just 1 investment to process all the winery's products throughout the year. For wine merchants, this functionality will ensure greater profitability for their wine treatment process, thanks to a significant reduction in waste volumes. The process developed in this way provides an optimum response (flow rate, discharge volume, quality of filtered product) to all the different products that vary widely in terms of turbidity, suspended solids, viscosity and the presence of fining products, while remaining very user-friendly and simple to use for operators. This innovation also helps to reduce environmental impact, offering a genuine alternative to earth filtration (particularly for lees filtration), which consumes a lot of water, manpower and energy and is highly polluting.

Contact : M. Yannick CADOT
yannick.cadot@buchervaslin.com

EXXACT ROBOTICS (FRANCE)

Autonomous vineyard straddler

TRAXX Concept H2

EXXACT Robotics has developed a new innovation: **TRAXX Concept H2,** the world's first autonomous hydrogen-powered vineyard straddler. This autonomous machine is powered by a hydrogen fuel cell.
TRAXX Concept H2 is a new innovation that will complement the TRAXX range, a compact autonomous straddle arm that has already been developed and marketed.

The aim of the concept is to demonstrate, test and experiment with the integration of a hydrogen fuel cell in an autonomous vineyard straddle-tram, as well as safety, ergonomics and recharging solutions. Carbon-free hydrogen offers an efficient, clean alternative to hydrocarbons. It reduces soil compaction by making wine-growing machinery lighter, reduces noise pollution, eliminates CO_2 emissions and optimises work rates thanks to fast recharging times.
The TRAXX Concept H2 autonomous straddle tractor features full power technology, combining a hydrogen fuel cell with small batteries providing up to 35kW of available power. Thanks to the 10kg of hydrogen gas stored on the machine at a pressure of 350 bars, the autonomous hydrogen straddle truck can work for a day without interruption to recharge.

Contact : Mme. Virginie LOUIS
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GÜTTLER (FRANCE)

Vineyard seed drill

GreenManager® Güttler®

Composed of 4 elements that can be used individually or in combination with **GreenManager® Culti, GreenManager® HarroFlex, GreenManager® Roller + Seeder and Adaptation for crumbling discs.**

A unique, customised concept - 1 tool, 2 seeders! The pneumatic seed drill consists of 2 x 100L hoppers for deep sowing of large seeds, and sow small seeds on the surface over the entire working width and seal them with the roller

GreenManager® - For optimum, effective weed management offering a number of benefits : Increasing soil fertility ; Reduce pesticides, protect bees ; Compensating for extreme weather conditions **and Secure yields**

Contact : M. Jean-Baptiste COLBOC
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HYDROKIT - VENSYS GROUP (FRANCE)

Electrification of vine-growing tools mounted on robots, carriers or tractors powered by electricity

VITI electrification

The electrification of winegrowing tools is a solution for responding to changing practices while ensuring carbon neutrality. It allows you to anticipate technical developments and adapt to electrically powered carriers or tractors.
The product comes in the form of a kit developed specifically for winegrowing tools (such as trimmers). The kits are designed to be integrated into original equipment or retrofitted. Electrification aims to decarbonise tools as part of a zero-emission, eco-responsible approach.

The VENSYS Group supports manufacturers in the design of 100% electric and hybrid transmissions and electrohydraulic solutions up to 800Vdc. The Group's capabilities enable it to supply solutions in kit form and build complete machines in its workshops. Drawing on the expertise of its design offices, retrofit solutions in the form of kits to be integrated into existing tools (particularly for wine-growing) are developed. These kits, defined on the basis of multi-physics numerical simulations, incorporate a set of optimised components including the motor, the drive, the lithium-ion battery pack and its BMS, the charger and the on-board computer. The layout at the heart of the tools and machines is then carefully calculated to optimise performance and safety during operations.

Contact : M. Aubin CHAUVET
a.chauvet@vensys.com

MODICO (POLAND)

Bottles seamlessly printed all over with the LSINC Perivallo360m printing system

LSINC Perivallo360m

With the UV printing system **LSINC Perivallo360m,** Modico Graphics presents completely new possibilities in the printing of bottles and other cylindrical objects. Perivalo 360m uses sensors to detect the contour of the object during the printing process and automatically adjusts the position of the print heads. With this innovation, completely new bottle designs are possible in rotary printing, which previously could only be realised with greater effort by using plastic film (so-called «sleeves»). By using residue-free burnable printing ink in the Perivallo360m printing system, LSINC solves a sustainability problem in the industry at the same time.

Contact : M. Jean-Jacques FAUVEL
jj.fauvel@modico.com

NETAFIM FRANCE (FRANCE)

PULSAR™ + STRIPNET™ X

Extreme weather events are the result of a dramatic increase in climate change. Frost and heat waves are becoming increasingly frequent and can cause irreversible damage to crops and ultimately to yields. While some solutions already exist on the market, Netafim has gone one step further and designed the only alternative solution to protect crops from extreme events: the STRIPNET X. The new **Pulsar™ + StripNet™ X** is a unique, patented micro-sprinkler designed to achieve coverage on a relatively narrow 1.2 metre wide row suitable for row crops (Viticulture and Arboriculture for example). It protects against damage caused by frost or hot weather by providing effective, even irrigation, using very little water per hectare compared with existing solutions (-50%).

The innovative hydraulic pulsing technology allows a larger surface area to be protected with the lowest possible flow rate. The Pulsar™ delivers several pulses per minute, while ensuring even watering over the targeted area and for many hours, while the STRIPNET™ X transmitter concentrates the flow on the row. The unique pulsing mechanism allows each emitter to cover a wide range while maintaining a low flow rate, helping to reduce emitter units per hectare, infrastructure, cost and water consumption..

Contact : Ms. Céline PALVADEAU
celine.palvadeau@netafim.com

PELLENC (FRANCE)

E-Sprayer

PELLENC has been exploring the development of electric spraying for many years. E-Sprayer has been designed on the basis of top-hand treatment, for ease of handling and enhanced operator safety. Suitable for narrow vineyards (row width 0.8m > 1.20m) in northern Burgundy, the Loire and Champagne, it is light and compact. The air is produced by turbines from our AIRION battery-powered blower, designed for the maintenance of green and urban areas.

5 innovative features:

- Electrification of product dosing and air production spraying: no central turbine, to reduce noise and energy consumption. Modularised air supply guarantees the same flow per half-row and perfect balance;
- Boom design without air circuit: lighter, easier to adjust working width, and optimised functionality (sprayer and straddle harvester);
- Optimised HMI: variable arch track adjustment with a single click, folding and section cutting control on the handle, with permanent visibility of the arch and product outlets;
- Responsive opening and closing: electrification provides instantaneous product control, with the driver controlling at his fingertips for optimum dosage;
- Cleaning control from the cab: electric valves on the product circuit for rinsing the vault and tank from the driver's seat, with no need for intervention.

Contact : Ms. Juliette MANSON
j.manson@pellenc.com

RAMONDIN (FRANCE)

100% recyclable capsules

e-CAP

With the **e-CAP,** Ramondin, leader in the supply of capsules dedicated to wines, spirits and sparkling wines, has developed and patented the only plastic-free, 100% recyclable aluminium complex capsule. The e-CAP is made up of 3 aluminium layers (30/30/30), unlike the standard aluminium complex capsule that is widely used and contains polyethylene, which is not recyclable. This innovation reduces the direct consequences of using plastic: deforestation and plastic waste, and is part of a circular approach (aluminium recycling). Ramondin joins the commitment of customers and consumers with a recyclable and sustainable product that respects the environment.

Contact : Ms. Monique FABRE
mfabre@ramondin.com

SIPREM INTERNATIONAL SPA (ITALY)

Exploitation of fermentation gas in grapes pressing

The system enables to recycle and re-use for grapes pressing puroposes the fermentation gas, namely carbon dioxide, made available in lage quantities by the fermenting processes. This results in lower plant costs and environment safeguard.

Contact : Ms. Erica SMACCHIA
e.smacchia@siprem.it

SYNGENTA FRANCE SA (FRANCE)

EXPLOYO Vit

EXPLOYO Vit is a liquid sprayable mating disruption solution to protect vineyards against Eudemis (grape worm).
Biosourced, it is based on an innovative formulation of beeswax and vegetable oil microcapsules containing the pheromone. One litre of EXPLOYO Vit, which protects one hectare of vines, contains around 10,000 billion pheromone microcapsules designed for gradual release. In this way, the bunches of grapes and the leaves of the vines become the medium for releasing the pheromones, ensuring even coverage of the plot at key moments in the protection against Eudemis. As soon as it is applied, each microcapsule acts like a microdiffuser, gradually releasing the pheromone.
Designed and produced in France by M2i Group and marketed by SYNGENTA, EXPLOYO Vit contains no plastic or solvents. EXPLOYO Vit is a liquid solution that can be sprayed and mixed with many of the protection products used in viticulture. Applications can therefore be easily integrated into protection programmes, without generating additional constraints. EXPLOYO Vit is classified as biocontrol and can be used in Organic Agriculture.
Because it is applied by spraying, this product is easy to use, highly effective and flexible enough to adapt to the year's climatic conditions and pest pressure.

Contact : Ms. Marine DENNIEL
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FOCUS ON
the members of the 2023 jury

TO EXAMINE EACH ENTRY IN DETAIL AND PROVIDE ACKNOWLEDGED EXPERTISE ON ALL THE MARKETS AND SECTORS PRESENT AT SITEVI, HE JUDGING PANEL BRINGS TOGETHER THE BEST FRENCH AND INTERNATIONAL SPECIALISTS.

More than 20 members: science directors, research fellows, engineers and lecturers but also regular users of equipment, have pooled their expertise to establish a unique roll of honour. To analyse each entry, the judges also call on technical experts from their network. In total around 100 specialists offer their opinions to establish the list of winners. Thanks to them, the SITEVI Innovation Awards are considered a benchmark on the market for equipment and know-how in vine-wine, olive and fruit and vegetable production.

CHAIRMAN

Christophe RIOU, IFV,
Chief Executive of Institut Français de la Vigne et du Vin (French Vine & Wine Institute - IFV)

SITEVI TECHNOLOGY ADVISERS, JURY RAPPORTEURS

Jean-Michel DESSEIGNE, IFV
Institut Français de la Vigne et du Vin,
winegrowing equipment specialist

Gilbert GRENIER, Bordeaux Science Agro
Retired lecturer in automation and machine engineering, expert in precision farming.
Author of "Agriculture de précision, les nouvelles technologies au service d'une agriculture écologiquement intensive"

Guillaume PAIRE, Vinipole Sud Bourgogne
Head of cultivation at the Joseph Leflaive estate

FOCUS ON
the members of the 2023 jury

JUDGES

Yann BINTEIN, CTIFL
Centre Technique Interprofessionnel des Fruits et Légumes, Research, innovation and expertise department - Deputy head of fruit programmes

Paul CAMMAL,
Independent consultant,
Fruit & vegetable specialist
Ex-director of Creman (Centre de recherche et d'expérimentation en machinisme agricole)

Eugenio CAVALLO, IMAMOTER
Istituto Per Le Macchine Agricole E Movimento Terra - CNR Consiglio Nazionale Delle Ricerche - Italy, Research Fellow

Pierre COMPERE, EXPLICITE consultants
Expert agritech consultant

Laurent DAVID, LA WINE TECH
President

Laurent DE BUYER, AXEMA
Chief Executive

Pierre-Henri DUBUIS, DEFR
Federal Department of Economic Affairs, Education and Research. Plant pathologist. Agroscope, Research area: Plant protection. Researcher in vine disease epidemiology, modelling and DSTs. Expert in control strategies, application techniques, evaluation of efficacy and side effects of fungicides in viticulture.

Emilie et Benjamin,
Domaine de la Grande Canague
Winegrowers and YouTubers with their channel "La VitiBio d'Emilie et Benjamin"

Emmanuelle FOURTEAU, Œnologues de France
Managing Director

Nassim HAMITI, FNCUMA
Fédération Nationale des Coopératives d'Utilisation de Matériel Agricole en commun, Agri-machinery Officer

Florentino JUSTE, IVIA
Valencia Agrarian Research Institute, Spain, Lecturer and Researcher, former chairman of European Society of Agricultural Engineers (EurAgEng)

Guillaume LE GONIDEC, FNEDT
Fédération Nationale Entrepreneurs Des Territoires, Farming and Environmental Work Officer

Valérie LEMPEREUR, IFV
Institut Français de la Vigne et du Vin, Deputy director of scientific programmes

Doria Maiz, Emballage Digest
Editor in chief

Jean-Luc PÉRÈS, PCMA,
Ex Trame BCMA Et APCA
Agricultural machinery expert, consultant, 25 years' experience in agricultural equipment, Project Leader at GIP Pulvé

David RULLIER, Groupe Rullier
Joint Managing Director and Chairman of Winegrowing Committee at SEDIMA

James TAYLOR, INRAE
World-renowned specialist in precision viticulture. Senior researcher in precision agriculture at the French National Research Institute for Agriculture, Food and the Environment (INRAE). Project development experience in Australia, UK, China, USA, Vietnam & France.

Balkis VICAIRE, VINSEO
Director

Vine-wine sector

TRENDS AND OUTLOOK
for the vine-wine sector

CHRISTOPHE RIOU
Chief Executive of Institut Français de la Vigne et du Vin (French Vine and Wine Institute)

A SECTOR MOBILISED BEHIND CORPORATE SOCIAL RESPONSIBILITY ISSUES

In 2023, the wine sector showed a strong commitment to CSR in response to society's expectations. Of the 466 French companies from all sectors that have been assessed as CSR-committed ("Engagé RSE"), 11% are from the wine sector.
In 2023, the French Vine and Wine Institute (IFV) furthermore became the first agricultural and agri-food technical institute to be awarded the AFNOR Engagé RSE label. With this label, the IFV is fully playing its role of supporting the sector in building a vineyard that is sustainable, resilient, vibrant and people-centred, thereby contributing to the sustainable development of communities and businesses. The CSR approach will also help to prepare the sector for the present-day challenges of adapting to and mitigating climate change, the agro-ecological transition and the necessary evolution of wine styles to meet changing consumer trends.

CLIMATE CHANGE: SOLUTIONS THROUGH INNOVATION

Against this backdrop, innovation is at the heart of the debate. After submitting its strategic plan on climate change to the French Ministry of Agriculture two years ago, the wine industry has implemented its action plan with two significant initiatives:

- The inclusion, subject to certain conditions, of Varieties of Interest for Adaptation (VIFA) has enabled the introduction on a small scale (5% of areas; 10% of the blend) of new foreign or heirloom grape varieties adapted to climate change and disease-resistant varieties in the specifications, without losing the appellation of origin, subject to precise technical monitoring under an agreement between the winegrower, the advocacy body (ODG) and the INAO.

- The Innovation Assessment Scheme (DEI) now opens the way for experimental winegrowers to introduce, for test purposes and for a given period of time, cultivation practices (density, leaf area, shading, etc.) or oenological practices, up to a limit of 10% of the quantities marketed under PDO.

"Innovate to stay" is one of the key elements of the strategy for adapting to and mitigating climate change adopted by the wine sector with the support of the INAO to develop specifications. The industry has chosen to innovate at the heart of winegrowing regions, with PDOs and PGIs heavily involved in this strategy. It should be recalled that 93% of French wine production is under PDO (60%) or PGI (33%), representing 437 advocacy bodies and more than 54,000 estates covering around 700,000 hectares of vines.

To cope with climate change, winegrowing has to meet two major challenges: adapt its practices and mitigate the effects of climate change by reducing its carbon footprint. The IFV has developed the GES&VIT tool, which can be used to assess the carbon footprint of winegrowing practices by individual estates. We also need to encourage the offsetting of greenhouse gas emissions by planting cover crops in vineyards and planting hedges to improve carbon sequestration in the soil. The industry recently submitted its specific Low Carbon Label guidelines for winegrowing to the

French Ministry for Ecological Transition. We can only welcome this. It will enable winegrowers to access the voluntary market to accelerate the improvement of their practices.e pour accélérer l'amélioration de leurs pratiques.

TRANSPARENCY OF PRACTICES

Following on from the drive for environmental certification, the industry has organised itself around new European regulations on wine labelling. From 8 December 2023, it will be compulsory to specify the list of all ingredients contained in wines produced after this date, as well as their nutritional value. All wine producers in Europe will then have to specify the composition of their wine, as well as its nutritional and calorie values, on bottles and bag-in-boxes©. The labelling may be dematerialised and take the form of a QR code. These new regulations, which will have a major impact on winemaking practices, will compel professionals to make less use of additives and turn to new physical methods.

The 2023 edition of SITEVI will once again be an opportunity to discover these new methods and innovations in a sector that is undergoing major change in the face of today's challenges.

"Innovate to stay" is one of the key elements of the strategy for adapting to and mitigating climate change.

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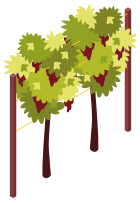
FIGURES
for the vine and wine sector



786 000 ha

France accounts for **11.2%** of the worldwide surface area devoted to winegrowing

The French vine and wine growing sector is established in

66 departements

93%

of French wine production bears a quality hallmark: PDO (60%) and PGI (33%) representing **437** advocacy bodies and more than **54,000** estates, covering approximately **700,000** ha of vineyard

1 farm in 5

has a vine-winegrowing activity. There are **59,000** of them in France. **57%** of volumes produced are vinified by individual wineries. The remaining **43%** are vinified by the **1,500** winemakers and dealers and cooperatives.

4.2 billion litres of wine

have been produced by France in 2022, making up **17%** of global production. It is the second largest producer of wine in the world by volume, behind Italy. **Three quarters** of the wines produced are still wines, **55%** of which are red, **26%** white and **19%** rosé

In 2022, global wine consumption remained flat at **33** billion bottles. **Ten countries** together consume **70%** of the wine produced in the world. **France is in second place,** behind the United States, at **3.5** billion bottles (750 ml equivalent) but ahead of Italy (2.6 billion bottles)

While the surface area of vineyards makes up **3%** of French agricultural area, wine represents **15%** of farm output by value (value at base price, **€12** billion at production)

Provence

is the leading region in France for the production of rosé wine, with **157** million bottles of AOC wine produced in 2022, equating to **38%** of domestic production and **4.2%** of all rosé wine produced in the world

Nearly **500,000** direct and indirect jobs are generated by viticulture in France. The vine and winegrowing sector in France is not only staffed by **500,000** people working in vineyards and wine (winegrowers, wine trade employees), but also by indirect jobs (services and logistics companies, employees of trade associations and public administrations, seasonal workers, etc.).

In addition to its indisputable role of countryside management and the protection of rural life, viticulture plays a key role for the leading French economic activity: tourism. **10,000** wineries open to tourists are frequented by more than **10** million visitors per year. **39%** of wine tourists are from abroad. **36** destinations carry the **label of "Vignobles & Découvertes"** and offer complete holidays revolving around the subjects of the vine and wine

*Source CNIV/Agreste/OIV

Fruit & Vegetable sector

TRENDS AND OUTLOOK
for the Fruit & Vegetable sector

Economic figures for Fruit & Vegetable production

PRODUCTION

France 4e
biggest fruit and vegetable producer in Europe, behind Spain, Italy and Poland

8 MILLIONS
tonnes on average between 2018 and 2020

5.5 MILLIONS
tonnes aimed at fresh F&V market

27,000
vegetable farms (covering at least 0.5 ha/farm), including 7,600 farms growing vegetables in fields for processing (over at least 0.5 ha/farm)

19,500
fruit farms (covering at least 0.5 ha/farm; excluding cider apples, perry pears and olives)
(source: Ctifl according to Agreste -2020 agricultural census)

More than 200
producer organisations
(source: ministry of Agriculture, 2021)

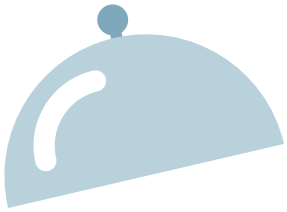
200
cooperatives
(sources: Insee, Ctifl 2022)

DISTRIBUTION

+ de 44,000
points of sale (hypermarkets, supermarkets, discount chains, click&collect, local shops)
(source: FCD/FCA 2019)

12,000
greengrocers
(source: Saveurs Commerce, 2020)

CONSUMPTION



20 billion
euros turnover at consumption stage (ex. VAT – excludes potatoes and self-grown)

1 billion
euros (ex. VAT) for eat-out foodservice on average over the 2018-2020 period
(source: Insee, CTIFL, 2020)

1,3%
of total French household expenditure
(source: Insee, CTIFL, 2018)
(sources: Eurostat)

FRUIT AND VEGETABLE SOVEREIGNTY PLAN

Following the announcement on 16 March 2022 by the then Minister of Agriculture, Julien Denormandie, of a French and European fruit and vegetable sovereignty plan, Interfel set up a task force, then a steering committee reporting directly to the Board of Directors, to ensure that the industry worked together on this plan and formulate concrete proposals for submission to the government.

This fruit and vegetable sovereignty plan is in line with Interfel's long-standing demand for an ambitious support plan for our sector. Capitalising on recent contributions from the inter-profession (post-Covid action plan, Varenne de l'eau contribution, etc.), Interfel and all its member organisations drew up a white paper that served as the basis for initial proposals to enable the sector as a whole to regain competitiveness and French production in particular to progress. This note proposed four strategic priorities and a roadmap based on eight challenges broken down into 28 proposals.

This ambitious contribution from the sector was the starting point for the work to draw up the fruit and vegetable sovereignty plan launched by the Ministry of Agriculture in the second half of 2022, which was materialised by the activation of four working groups (WG) in which Interfel played an active part:

- WG1 on crop protection
- WG2 on competitiveness, investment and innovation
- WG3 on research and innovation, experimentation, training and generational renewal
- WG4 on boosting fruit and vegetable consumption in the food model

For each of these groups, expert professionals from the various trade organisations that are members of Interfel were appointed alongside an Interfel representative. This strong involvement of the entire sector enabled the plan's action sheets to be drawn up jointly with the administrations responsible for the various working groups (DGAL, DGPE and DGER).

There are many benefits expected from the fruit and vegetable sovereignty plan. In addition to the hoped-for benefits in terms of the competitiveness of the French fruit and vegetable sector, these benefits should also have a wider impact on our fellow citizens, whether through the savings that could be made directly and indirectly through better protection of the sector or those generated by lower health costs, without forgetting the benefits for our environment.

- Investing in fresh fruit and vegetables means first and foremost reducing public health expenditure by curbing the consequences of non-infectious diseases;
- Investing in crop protection means reducing the need for crop insurance, at a time when extreme weather events are on the increase;
- Investing in fruit and vegetables also means mitigating rising temperatures and protecting the environment, in particular by storing carbon and promoting biodiversity;
- Investing in fruit and vegetables means helping to shore up our trade balance.

PILLARS OF THE PLAN

1 Supporting the industry to improve crop protection

Pillar 1 of the sovereignty plan, which deals specifically with «crop protection», was drawn up under the aegis of the DGAL (General Directorate for Food) in collaboration with the inter-professional organisations, including Interfel and its professional representatives, with the support of the CTIFL and in the presence of the stakeholders directly involved in these issues. Its objectives are to define priority actions to implement effective and sustainable solutions to combat the development of new pests and diseases, deal with the withdrawal from use of numerous active substances and support the industry in finding appropriate alternative solutions. It is based on three levers: regulations, research and experimentation, and the development of alternative solutions.

In practical terms, the fruit and vegetable sovereignty plan should make it possible to identify critical uses under pressure (crop/pest combinations) in order to prioritise actions without leaving any crop without a solution. This inventory, based on the work of the Commission for Orphan Uses (CUO) and on the expertise of the industry, will make it possible to work on the complementarity of the solutions identified for a given use and to identify the «blocking» factors for the non-implementation in the field of alternative solutions validated in France or in Europe in compliance with relevant pedoclimatic models.

To speed up the transition, an exhaustive survey of the innovative technologies available in a variety of fields will be carried out in order to analyse each one in terms of its degree of maturity, effectiveness and practicality, the possible

regulatory dimension, its ability to fit into current technical itineraries and the stages required for development and deployment. The most advanced techniques, such as the release of sterile insects already used in other countries, could be launched rapidly in the context of uses under critical stress, reinforcing the arsenal of available techniques employing chemical mediators, such as mating disruption, alarm pheromones, the use of deterrent or repellent plants and many other technologies already used elsewhere or in development phase.

2 Competitiveness, investment and innovation for the fruit and vegetable sector

Interfel played an active role, along with the industry, in the working group led by the DGPE on competitiveness, investment and innovation in the fruit and vegetable sector. To this end, a mirror group was set up under the aegis of the Economy Commission to provide input into the development of this area of the plan and to react to the draft action sheets issued by the teams at the Ministry of Agriculture and Food Sovereignty. Following on from the white paper drawn up by Interfel prior to the launch of preparatory work on the sovereignty plan, the sector defended strong principles such as the need for monitoring indicators, the need for a major administrative simplification, the introduction of a one-stop shop or dedicated desks to facilitate access to funding, and the need for new and ambitious funding tailored specifically to the fruit and vegetable sector. In addition, in-depth work was undertaken to put a figure on the industry's investment needs, in terms of both orchards and market gardens, and to define appropriate criteria for supporting these activities, at all stages of our industry, as well as many other technologies already used elsewhere or in development phase.

3 Research-experimentation, training and generational renewal

The third working group set up by the Ministry of Agriculture and Food Sovereignty to draw up the Fruit and Vegetable Sovereignty Plan was very broad, since it had to deal with both Research-Experimentation and Training & Generational Renewal. This WG was steered by the DGER. In view of the subject, Interfel mobilised the SIREF Commission. The CTIFL was naturally heavily involved, both in the Research, Innovation and Expertise Department (DRIE) and in the Capitalisation and Transfer Department (DVT). Very quickly, and due to the launch of the Pacte and the Loi d'Orientation et d'Avenir Agricole (PLOAA (Future of Agriculture Act) by the Minister of Agriculture, the second part of the project was limited to vocational training. At the time, Interfel insisted that the subject should concern all parts of the industry with similar needs, and that innovative schemes should be put in place to enable as many people as possible to get involved in areas where they had already failed. In terms of research and experimentation, many proposals concerned governance, optimising technical resources, defining strategies and medium- to long-term studies. Interfel contributed to reiterate its request for objectives, financial resources, a one-stop shop and support, and to restate the urgent nature of these requests in view of the difficulties experienced by all professionals in all parts of the sector. Interfel also recalled the existence of the SIREF Commission and the drawing up of priorities every 3 years with a solid scheme for formulating the CTIFL's annual programmes. These interventions aim to build new tools and increase the capacity for research and experimentation for the benefit of the sector, within an optimised governance framework!

4 Boosting fruit and vegetable consumption

Pillar 4 of the Fruit and Vegetable Sovereignty Plan was added at Interfel's request in order to implement actions that could boost consumption. It was piloted by the DGAL (General Directorate for Food) in collaboration with the inter-professional organisations, including Interfel and its professional representatives who are members of the Communication Commission, with the support of Aprifel and CTIFL.

To this end, a mirror group was set up, in which professionals were particularly active between October and the end of December 2022, to be a source of proposals for the development of this area of the plan and react to the draft action sheets issued by the teams from the Ministry of Agriculture and Food Sovereignty. The first step was to take stock of consumption levels in relation to the PNNS (national health and nutrition plan) recommendations: only a small proportion of the French population meets the recommended consumption levels, and almost half the population consumes very little. What's more, the youngest generations eat four times less fruit and vegetables than the older generations. Based on these findings, a number of issues were addressed, with the priority being to support tomorrow's generation in getting more access to fruit and vegetables, in line with their societal choices, by implementing concrete, ambitious actions.

Olive sector

TRENDS AND OUTLOOK
for the olive sector

LAURENT BÉLORGEY
Chairman
of France Olive

Supporting all those involved - nurseries, producers, millers, traders - is in the **DNA of France Olive** and remains our priority, while at the same time raising consumer awareness of the full wealth of our sector and its products.

OLIVE GROWING IN MODE 2.0!

Last year's concerns regrettably translated into a sharp drop in production this year, with only 3,200 tonnes of olive oil produced. We would have to go back three years to find the same level. Since then, we had enjoyed two good years in terms of both production and sales. Last year, we thought we would not have enough stock to meet demand, even with production standing at 5,600 tonnes... So what could be said of this year?

Climate conditions (a heat spike during flowering, drought, storms in the autumn, etc.) are just some of the reasons for our current difficulties, but do not constitute the full story. Production from French groves remains insufficient, even though the added value of our olive oils should ensure that all those involved in the sector - producers and millers - make comfortable margins.

It is no coincidence that new French regions are showing an interest in olive growing, with ambitious planting projects. Nor is it by chance that foreign olive-growing sectors are coming to meet us to understand our model. This model is based on our territorial network of Quality and Origin Identification Signs, with nine PDOs/AOCs for olive oil and six for table olives. It's a success story we've built up over the years, and one we are envied for!

Our weak point: the technical skills of our olive growers. According to the latest agricultural census in 2020, there are 7,500 professional olive growers working 17,000 hectares. The average surface area, 2.2 hectares per farm, and the number of olive-growing technicians do not allow us to monitor each producer individually. However, technology offers us a fantastic opportunity to provide them with a virtual technician. That's what the Oléiculteur application is all about. This is a genuine Decision Support Tool, or DST for those partial to acronyms, available free of charge to all olive growers, as it is financed by our membership fees. Based on the data entered (farms, plots, observations, operations), data retrieved (weather and tomorrow drone or satellite images) and the knowledge of France Olive and the entire sector, the application will help olive growers protect their groves (olive leaf spot, moths, flies), provide nutrition (amendment and fertilisation), irrigate, and trigger the harvest depending on the ripeness of the olives. The community aspect is not forgotten, with the opportunity to find out more about your environment and everything that happens in the groves around you, while preserving your anonymity. Identifying diseases and pests, as well as olive varieties and their compatibility for pollination, are also among the planned functions. Technicians have already been using it for a few months, and you can now download it free of charge onto your smartphone or use it from your computer or tablet at https://oleiculteur.franceolive.fr. Developments are still in progress and new features are being added regularly. We are always open to suggestions on how we can improve and enhance it.

More than just an improvement in our communication with olive growers, this is a highly structural revolution for the France Olive teams. Transforming knowledge into algorithms or equations, anticipating every situation and being able to provide a solution all require complex work and highlight our shortcomings, but also provide opportunities to correct them. In the future, every penny spent on agronomy should lead to a feature to enhance

our application and be of immediate use to olive growers. A real compass for our experiments, research and the theses we will be funding.

Tomorrow's agriculture will be highly technical to meet the challenges of climate, society and the environment. We will have to be precise in our use of water, in the nutrition of our trees and the protection of our fruit. The olive oil industry must embrace this change of direction and not let itself get left by the wayside. France Olive must invest to ensure our independence and control our destiny, otherwise private companies will take over.

We must also stay one step ahead in terms of the quality of our olive oils and olives as science progresses. A multitude of analyses are regularly carried out on each stage of the extraction or preparation process, from harvesting to the bottle or jar. The materials used, right down to the smallest joint, are also analysed to draw up lists of recommended equipment. Our olive laboratory has acquired a gas chromatography analyser to analyse lipids in-house and be more reactive. Recent events have shown us just how important it is for us to have the in-house skills and resources to prove that our products meet their commitments.

Understanding consumer expectations and educating them about the diversity of tastes to increase awareness of our olive oils and table olives are still the focus of our communications. This means taking part in exhibitions for the general public, organising Master Classes, running the Maison des Huiles et Olives, maintaining an active presence on social media, and so on.

Finally, protecting the interests of the industry in Paris and Brussels on issues as diverse as the Egalim Act, bulk sales, codes of practice, environmental regulations (the French ICPE), public funding for our initiatives, the Cotisation Foncière des Entreprises (company land occupation tax) and matured taste all make up the hidden part of the iceberg: the part that is invisible to the naked eye, but which is necessary for the long-term future of our sector.

Supporting all those involved - nurseries, producers, millers, traders - is in the DNA of France Olive and remains our priority, while at the same time raising consumer awareness of the full wealth of our sector and its products.

WHAT NEWS OF THE 2022/2023 CAMPAIGN (IN FRANCE)?

The last olive growing season was marked by adverse weather conditions which had a significant impact on olive oil production: high temperatures and low humidity during the flowering period, which caused blossom scorch and prevented fruit set; extreme heat and drought throughout the summer, which led to fruit drop; and rain and relatively warm weather in the autumn, which kept the water content of the olives extremely high until very late in the season, preventing the traditional increase in oil yields as winter approached.

All these factors combined to produce a small harvest, currently estimated at around 3,850 tonnes.
Production is driven by the Sud (Provence-Alpes-Côte d'Azur) region, with an estimated 2,200 tonnes, 50% of which is in the Bouches-du-Rhône. Production in the Occitania region is estimated at 1,100 tonnes, with over 50% of that in the Gard. The Rhône-Alpes region, with 350 tonnes, and Corsica, with 150 tonnes, complete the picture of a much lower-than-average output.

In terms of table olives, forecast production is very low at just 900 tonnes, half of which (450 tonnes) will be produced in the Aude department. The forecast for production in the Sud region is 260 tonnes of olives, of which 220 tonnes will come from the Bouches-du-Rhône department. The Rhône-Alpes region, the leading producer of black olives, is forecast to produce around 250 tonnes of olives, which is half the amount produced in the previous two years.

OUTLOOK
for the sector

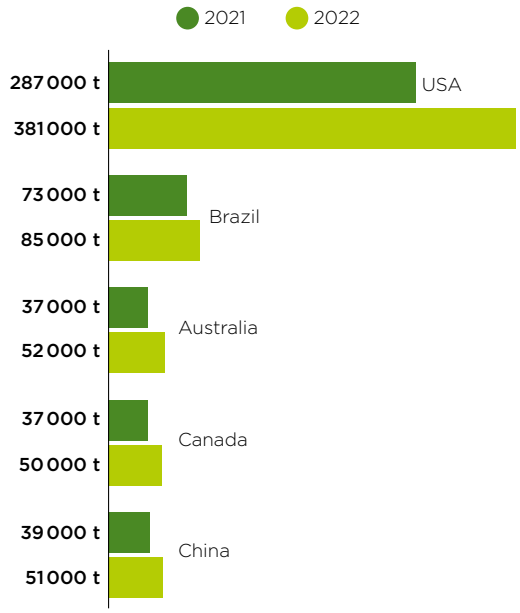
2.73 million tonnes

The worldwide production of olive oil during the 2022/2023 season is the lowest since 2017, at 2.73 million tonnes. It remains driven by the European Union which, with 1,504,500 tonnes, makes up 55% of world production. Spain, with 780,000 tonnes, accounts for 52% of European production. Greece moves into second place with 350,000 tonnes, ahead of Italy, with 235,000 tonnes.

3,055,000 tonnes

Worldwide consumption. Equating to more than 3,3 billions litres of olive oil consumed in the world in 2022/2023.

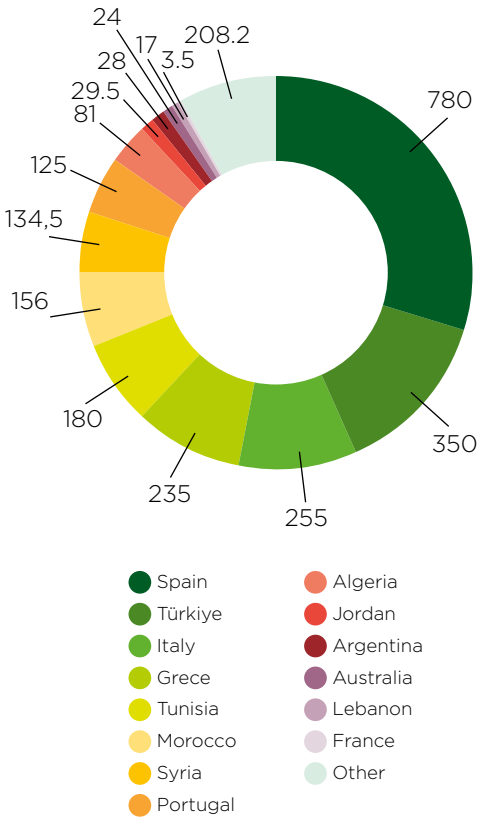
To be noted: consumption increases:



Production

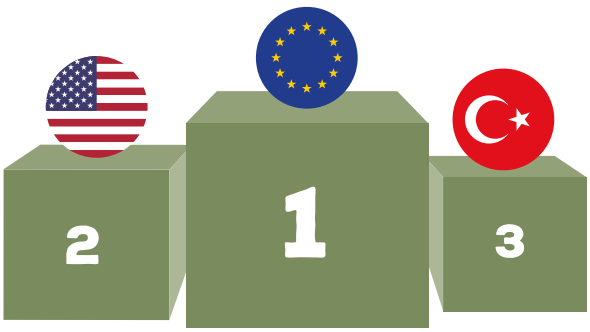
Worldwide olive oil production 2022/2023 season

(in thousand tonnes, IOC data, graph, A Paris/France Olive)



Main olive oil consumers

(IOC data - 2022 / 2023)



USA
381 000 t

European Union
1 411 000 t

Türkiye
179 000 t

2021/2022 season - french production

5,863 tonnes of olive oil → of which **1,781 tonnes** in PDO → i.e. **31%** of production

French olive oil

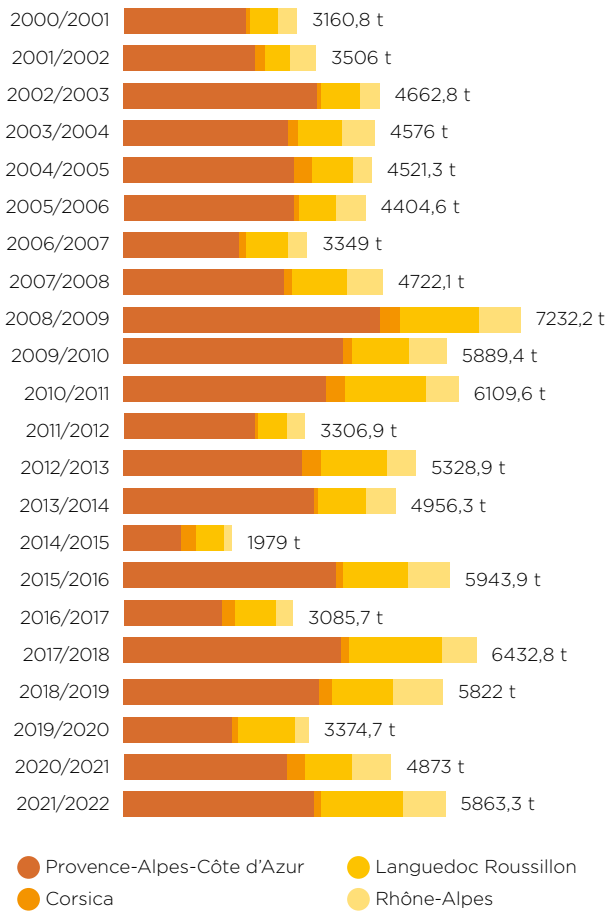
3,850 tonnes

The 2022/2023 season was a small season with 3,850 tonnes of olive oil forecast to be produced (3,700 tonnes produced on the continent and 150 tonnes in Corsica). Production driven by the departments of **Bouches-du-Rhône** (**35%** of domestic production), **Gard (14%)** and **Vaucluse (12%).**

Variation

in regional production of olive oil in France

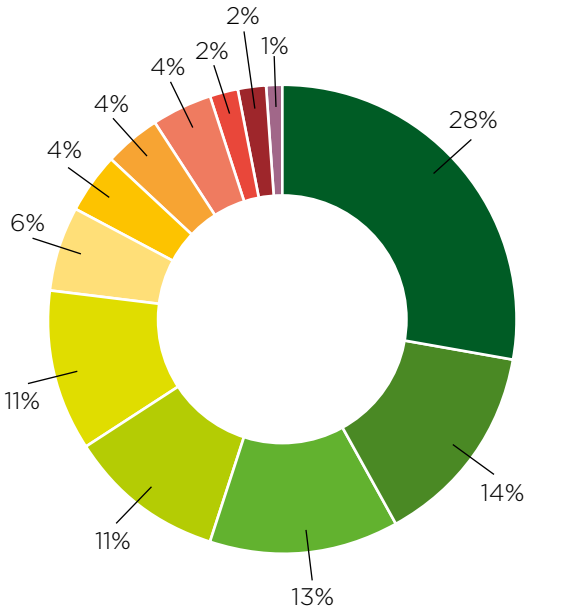
(in tonnes, France Olive / France AgriMer data, graph. A Paris)



Production

by département of olive oil in 2021/2022

(in tonnes, France AgriMer / France Olive data, graph by France Olive / A. Paris)



121,500 tonnes

Average French consumption over five years: 121,500 tonnes, including more than 72% extra virgin olive oil. Consumption of olive oil experienced a sharp rise in 2020 and 2021 then fell in 2022 while remaining above pre-Covid levels, with 125,000 tonnes consumed in France. Proportion of French production in French consumption in 2022: 4 %.

Main suppliers of olive oil to France, 2022

CONSUMER TRENDS

2022 (based on sales in mass retail)

68,935 tonnes
Total sales in mass retail

1,783 tonnes down compared with 2021 (an exceptional year)

Trend:
organic market share losing momentum

Organic olive oils, which had been driving the market for several years, declined for the first time in 2022, losing 1,689 tonnes.

56,149 tonnes
Non-organic olive oil

12,786 tonnes
Organic olive oil

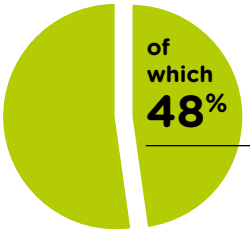
The organic market share remains high at 18.5%.

Mass retail sales
struggling but remaining above 68,900 tonnes

A substantial share of olive oils is sold in conventional supermarkets, followed by hard discount where sales rose over a year. For the first time, online sales, hitherto a highly dynamic channel, saw a sharp drop in 2022

51,526	12,005	5,404
tonnes (-2,5%) Sales in conventional mass retail	tonnes (+ 1,27%) Sales in hard discount	tonnes (- 12%) Online sales

Turnover accounting
for more than 48% of the turnover of vegetable oils



Olive oil

Olive oil turnover:
561 millions euros

1.16 billion euros
Vegetable oil market turnover

Prices
which continue to rise since 2012

An average price of olive oil

+2.51 €
rise in 11 years

4.90 € in 2012 | **7.61 €** in 2021

A gap between organic and non-organic

Organic oil Bio **+2.28€**

6.30 € in 2012 | **8.58 €** in 2021

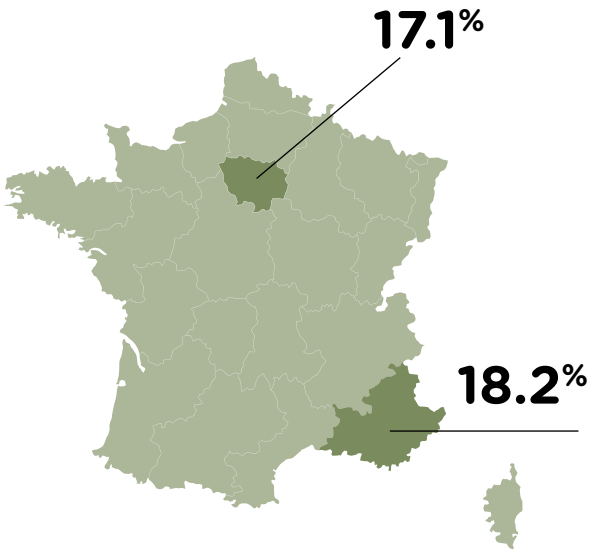
Non-organic oil **+2.39€**

4.80 € in 2012 | **7.19 €** in 2021

The average price of French olive oil sold in mass retail stands at around €27 per kilogram. The proportion of French oils in the olive oil section remains extremely low, approximately 350 tonnes, or 0.5% of the market.

CONSUMERS
of olive oil

(according to purchases in mass retail)



20.1 million households
that buy olive oil

The penetration rate is the highest among vegetable oils (70.2%). Despite a slight drop, the penetration rate remains higher than pre-Covid levels (66.4%).

The **Île-de-France** and **South-East regions,** accounting for respectively 17.1% and 18.2% of buying households, are the regions where olive oil is **the best established.**

Weight
of number of olive oil buying households in France

(2020, Nielsen data, graph France Olive / AP)

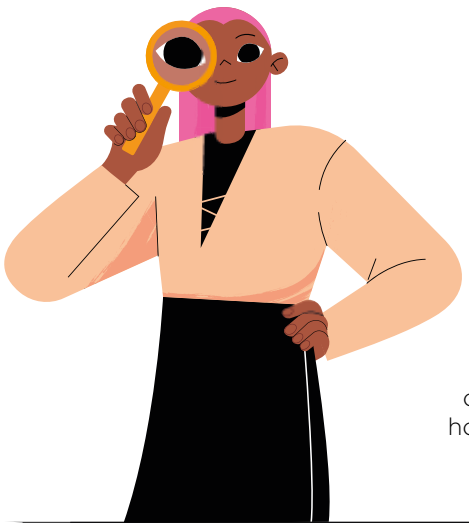
14.9%
Paris region

24.1%
Cities with 200,000+ inhabitants

17.1%
Cities with 20,000 to 200,000 inhabitants

26.6%
Rural villages

17.2%
Towns with fewer than 20,000 inhabitants



Profil
des consommateurs

11.2%
low proportion of consumption by under 35s

70.4%
of consumers are high proportion of ABC+ classes

64.6%
of consumers are in households with 1 to 2 people

3.5 liters
bought per year per buying household

€25.9
spent per household to buy olive oil

Appendices

PRACTICAL INFORMATIONS

SITEVI 2023

MONTPELLIER EXHIBITION CENTRE

Route de la Foire, 34470 Pérols

- **Tuesday 28 november to Thursday 30 november 2023**
- **From 8:30am to 6:00pm**

How much does it cost to visit?

- **Individual visitors:**
Online: €20
On the door: €30

- **Student:**
Free (with proof of status)

How can i book accommodation?

BNETWORK is the official travel agent partner of SITEVI.
A selection of hotels close to the Montpellier Exhibition Centre or easily accessible by public transport is available. For your reservations, you can consult our hotel platform and make your reservation in real time. For any request specific, you can contact:

client.paris@bnetwork.com

+33 (0)1 58 16 20 10

More informations:

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practical infos

VISITORS

How do i get to sitevi?

Shuttles and car parks
For the convenience of visitors, parking at Montpellier Exhibition Centre is free of charge. Free shuttles are also available, running between **Montpellier Méditerranée international airport and the Montpellier Exhibition Center, Sud-de-France Train station / Montpellier Exhibition center and parking**.

By air
The airport is located a 7-minute drive from the Montpellier Exhibition Centre. Preferential fares are available on Air France & KLM Global Meetings travel with the identifier code **39595AF** (valid for travel **from 21/11/2023 to 07/12/2023**).

By tram
Take line 3 (green line) towards **Pérols Étangs de l'Or** and get off at the **Parc Expo** stop. Opposite Montpellier railway station, you can obtain a free tram ticket on presentation of a visitor or exhibitor badge.

By train
Montpellier-Saint-Roch station is located in the city centre, 15 minutes from the Exhibition Centre. From there, take the tram to get to the show. Opposite Montpellier train station, you can obtain a free tram ticket on presentation of a visitor or exhibitor badge.

By car
To get to the Montpellier Exhibition Centre, take motorway A9. **Exit at Montpellier Est-Fréjorgues.**

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