


Chapter 11


Spanish Wine Industry Internationalization: Unpacking Trade Flows and Concentration Levels

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ABSTRACT

The Spanish wine industry has established itself as a significant player in the global market, ranking first in terms of wine exports by volume and third in terms of export value, trailing only France and Italy. The presence of Spanish wine in key international markets not only contributes to the maintenance of Spain's brand reputation, but also serves to enhance it on a worldwide scale. Through a comprehensive descriptive analysis utilizing secondary sources of information, this study seeks to examine the patterns of wine trade flows and the level of concentration within these flows to elucidate the level of equality or inequality among Spanish wine exporters. The findings reveal that over the past decade, Spain has consistently maintained a surplus in the wine trade balance exceeding 2,000 million euros per year, with more than 80% of wineries engaging in regular export activities, largely dominated by a

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small number of large wineries.

INTRODUCTION

The Spanish agri-food industry combines maturity, a prevalence of small companies, and strong territorial roots. Simultaneously, it undergoes a process of internationalization, technological innovation, and the development of distribution channels (Rodrigo-Alarcón et al., 2014). Within this context, the wine value chain—comprising viticulture, winemaking, and marketing—holds a significant position in the overall industry. It stands out for both the quality and diversity of its production (Fuensanta et al., 2015).

The wine industry contributes significantly to Spain's economy. It generates a Gross Value Added (GVA) exceeding €23.7 billion, equivalent to 2.2% of the country's GVA. Additionally, it provides over 427,700 jobs, representing 2.4% of Spanish employment. Beyond economic impact, the wine sector contributes substantially to public finances through taxes and social security contributions. Annually, it directly contributes more than €3.8 billion in tax revenue to the State (AFI, 2020).

Moreover, the connection between wine and Spanish culture is deeply ingrained. The tradition of vine cultivation and winemaking has left an indelible mark on Spain's cultural and heritage legacy. This connection is evident in local festivities and the widespread presence of vineyards across all Spanish autonomous communities, as documented by the Ministry of Agriculture, Fisheries, and Food (MAPA) in 2020 (Marco-Lajara et al., 2022a-d).

In order to carry out this research, wine companies (wine production) have been selected as the unit of analysis given their importance for the economic and social development of Spain. Thus, according to the latest data provided by the International Organization of Vine and Wine (OIV), Spain is a world reference in the wine sector, occupying the first place in the world in terms of surface area and export volume, as well as the third in terms of production, which shows the economic weight of the wine industry in the Iberian country. Through this research we contribute to generating useful knowledge for the decision-making process of wineries, which can consider the results of this research as a reference point for the development of the internationalization of their companies.

What is the trade balance of Spanish wine? How many exporting wineries are there in Spain? Are exports concentrated in a few wineries or fragmented among a large number of companies? These are the questions that the chapter aims to answer, providing new knowledge in the field of the international trade of Spanish wine. This chapter is therefore of great relevance, since it allows us to analyze the trade balance of Spanish wine over the last two decades, and can serve as a reference for

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