



SITEVI

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

25>27 NOVEMBER 2025

**PARC DES EXPOSITIONS
MONTPELLIER • FRANCE**



COMEXPOSIUM



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**PRESS RELEASE
SEPTEMBER 2025**

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EDITORIAL

IN TODAY'S ECONOMIC, CLIMATE AND SOCIAL CONDITIONS, SITEVI 2025 PROVIDES A FINE OPPORTUNITY FOR AGRICULTURAL SUPPLY CHAINS TO BUILD THE FUTURE TOGETHER.

The winegrowing, winemaking and olive sectors are facing up to a period of profound transformation. Global wine consumption has been steadily dropping for several years: -7% between 2018 and 2023. According to the OIV, this trend has continued in 2025, driven by cultural, generational and public health-related considerations.

In addition to this underlying trend, there also exists the threat of trade pressures. Since 7 August, European wines and spirits have been taxed with a 15% tariff upon their arrival on the American market. The United States remain an essential outlet, accounting for €2.3 billion euros of exports in 2024. The sector is set to potentially lose more than a billion euros from a measure that penalises both French producers and their American partners, and only heightens the pressure on an entire supply chain.

Climate challenges are also becoming ever more acute. With late frost, extended droughts, hailstorms and water stress, variability has become the new normal. Diseases such as mildew or flavescente dorée are gaining in intensity and frequency.

In these circumstances, the global wine map is being redrawn. New producer countries are appearing – the UK, Scandinavia, China – and could potentially modify historical balances. In the same vein, new winegrowing regions are emerging in France (Île-de-France, Brittany and Normandy for example). For our manufacturers, these new regions are markets that need equipping.

The sector is adapting and innovating by developing new models. Many estates are considering the step of **diversification**, with low-alcohol wines or fermented drinks, or combining grapevines with other crop productions such as olive or fruit growing. Such a choice might help spread climate and economic risks more equally, secure revenue and adapt better to market expectations.

This development is also an opportunity for AgTech manufacturers, with the emergence of new technical requirements: multipurpose machines, tools specifically for olive growing, solutions for converted plots. By diversifying their activities, farmers are paving the way for expanded demand, stimulating innovation.



**DAMIEN
DUBRULLE**
Chairman
of AXEMA

Agricultural innovation is progressing, but it must now be advantageous, affordable and appropriate. Examples include weeding robots, precision spraying, decision aids and AI assistance. These technologies help save on inputs and compensate for labour shortages. They are potentially within the reach of all farmers through the professional services of farm contractors, and with controlled costs through machine sharing as part of a farming club or a farm machinery pool.

Artificial intelligence is most notably becoming an operational performance improvement lever. When twinned with sensors and field data, it helps better anticipate crop health risks, organise tasks at the right time, improve production quality, and tailor farming methods to the actual conditions of each plot.

Two conditions are necessary to accelerate the adoption of these solutions: knowledge and control of farming data, and well-trained farmers. These are prerequisites if we are to increase efficiency on farms and improve their resilience.

Such is the ambition of SITEVI 2025: to bring together grass roots stakeholders and tangible solutions to efficiently deal with the issues they face.

During these challenging times, it is through listening, cooperation and innovation that the winegrowing world will remain a strength for French agriculture, its economy, and its influence abroad.

It is crucial to reinvent winegrowing to safeguard more than 500 years of wine history: this is our unique heritage!

EDITORIAL

SITEVI 2025: A strategic gathering and innovative solutions for the future of the vine-wine, olive and fruit growing sectors.



GUILLAUME SCHAEFFER
Exhibition Director, SITEVI

The countdown has begun for SITEVI 2025, and this next edition is already shaping up to be an unmissable rendezvous. All the indicators are positive, presaging a success that will cement the event's prominent place in the international farming calendar. More than just a tradeshow, SITEVI is a **genuine industry gathering**, designed to support our visitors in responding to new challenges and their search for diversification, technological innovation environmental sustainability and performance improvement to better cater to the needs of tomorrow.

The anticipated success of SITEVI 2025 is underpinned by solid foundations. The confirmed attendance of **key industry leaders** testifies to SITEVI's appeal and relevance as a platform for discussion and business.

As usual, the 2025 edition will be packed with content and a programme of highlights that have earned the exhibition its reputation.

- **The SITEVI Innovation Awards** will spotlight the most innovative solutions and companies providing new, tangible responses to the challenges facing the sector.

- **The tasting masterclasses** will provide in-depth themed sessions. Led by renowned organisations such as the Institut Français de la Vigne et du Vin (IFV), Œnologues de France, France Olive and CTIFL, they will help professionals develop their skills and acquire new practical knowledge.

- **A programme of more than 55 top-level talks**, addressing the crucial issues faced by our visitors today.

- Among the highlights not to be missed, **Olive Day**, held on Tuesday 25 November in partnership with France Olive, will be a prime occasion to explore the challenges and opportunities of this iconic crop.

- Conscious of the challenges surrounding employment and professional development, SITEVI offers a **Job Dating** space. Open to job seekers, recent graduates, and professionals looking for a career change, this space will facilitate meetings and opportunities.

- **The LAB TECH** will showcase cutting-edge technologies dedicated the vine-wine, fruit and

olive growing sectors. In partnership with La Ferme Digitale, Agri Sud-Ouest Innovation and La Wine Tech, this space is an inspiring showcase for the sectors represented at SITEVI.

- In addition, **Business Meetings** between visitors with projects and exhibitors will create quick and effective connections, helping to develop concrete solutions for moving projects forward. In this context, SITEVI will also host an exclusive **'Business Angels'** evening on Wednesday 26 November. This special event will bring together investors, innovative start-ups, exhibitors and top French and international buyers.

SITEVI 2025 enjoys the support of leading institutional and industry partners who contribute to making this event an unmissable occasion for these specialist sectors. The **IFV** (Institut Français de la Vigne et du Vin - French Vine and Wine Institute), a long-standing partner and major player in winegrowing research and development, supports exhibitors and visitors with its scientific and technical expertise. **France Olive**, the national reference for the olive oil sector, shares its knowledge and promotes innovations dedicated to olive groves and oil production. **Œnologues de France** bring their unique expertise, ensuring a direct link between wine production and quality. A major new development has further strengthened SITEVI 2025's ambition: the **CTIFL** (Centre Technique Interprofessionnel des Fruits et Légumes, or Interprofessional Technical Centre for Fruit and Vegetables) will be partnering with the event for the first time, alongside the **IFV**. This unprecedented collaboration highlights the exhibition's commitment to covering all sectors of the crop industry, providing a unique synergy between stakeholders in the wine, olive, fruit and vegetable industries.

Finally, the success of SITEVI 2025 is intrinsically linked to the unwavering support of the Occitanie/ Pyrénées-Méditerranée Regional Authority, the continuing patronage of its exhibitors and visitors, and the unrivalled depth of its content.

SITEVI 2025 is thus set to be a strategic edition, resolutely focused on the future, innovation and diversification. It is an unmissable event for everyone wishing to shape the agriculture of tomorrow.

FACT SHEET

VENUE

Montpellier Exhibition Centre
(Parc des expositions), France

DATES

Tuesday 25 to Thursday 27 November 2025

OPENING HOURS

8.30 am - 6.00 pm

FREQUENCY

Every two years - odd-number years

FOUNDED IN

1977

EDITION

32nd édition

SITEVI at a glance



1000 exhibitors
including **24%** from abroad,
from **20** countries



More than
200 new
exhibitors



55,000 trade
entries
attendees from **61** countries
in 2023

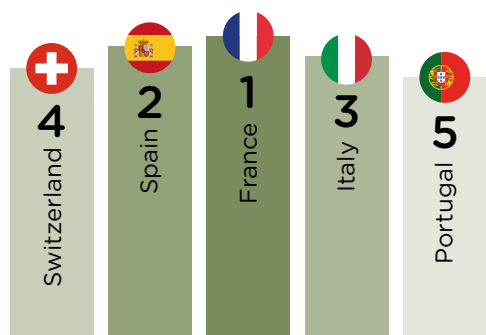


83% exhibitor
satisfaction*



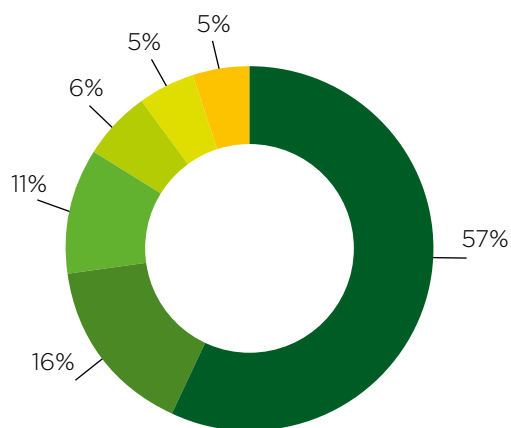
87% visitor
satisfaction

Top visiting countries



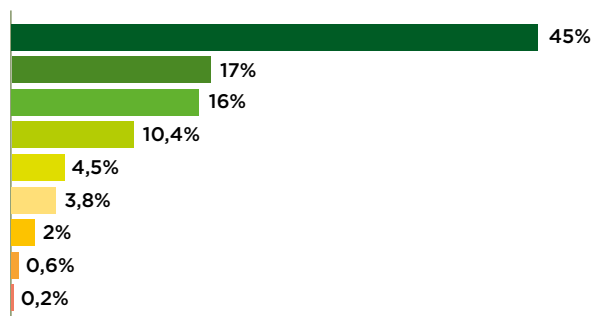
*Source: ADquation survey for SITEVI, February 2024

A qualified visitor audience



- Winegrower / winemaker
- Equipment manufacturer / dealer
- Trade association / Training / Services
- Trader / Cooperative
- Fruit grower / Market gardener / Olive grower
- Farm contractor / Machinery pool / Landscaper

Exhibitor sectors of activity



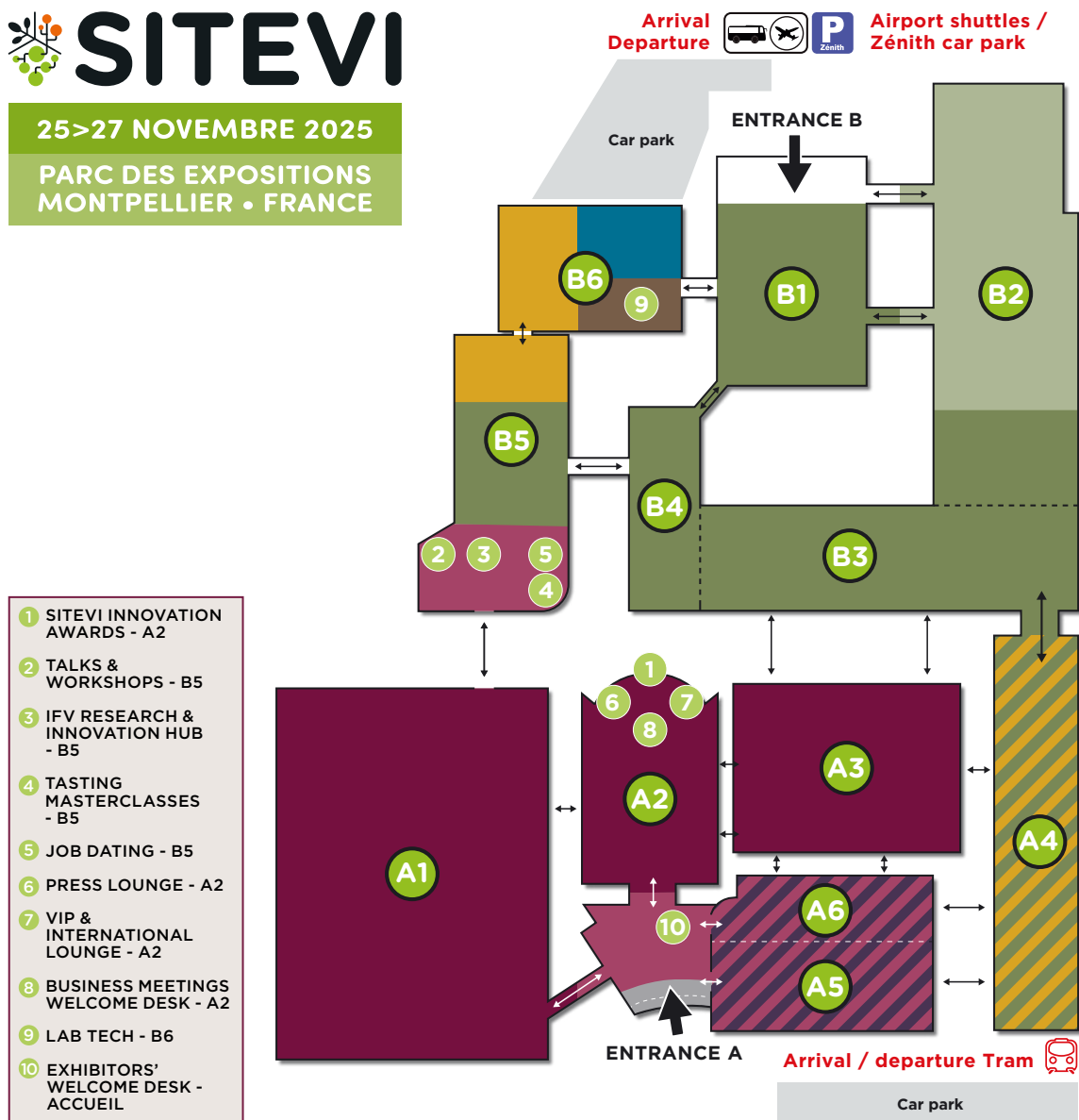
- Multi-sector equipment
- Equipment for vinification, oenology and processing
- Equipment for winegrowing
- Bottling and packaging
- Fertilisers
- Services
- Arboriculture
- Olive growing
- Renewable energy

PLAN DU SALON



25>27 NOVEMBRE 2025

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NEW FEATURES

and highlights

NEW TECHNOLOGIES IN THE SPOTLIGHT AT SITEVI 2025

The 2025 edition of SITEVI places particular emphasis on new technologies, through both its exhibitors and its talks programme. They can be found in the various halls of the exhibition, and more specifically in LAB TECH in Hall B6. Organised in partnership with Agri Sud-Ouest Innovation, La Ferme Digitale and La Wine Tech, LAB TECH is a space dedicated to discussion, designed as a crossroads for innovation, and will showcase the latest technologies and solutions for the future. It will also be an opportunity for start-ups and innovative companies to showcase their exemplary initiatives. LAB TECH aims to be a source of inspiration for more resilient, efficient and sustainable viticulture.

TALKS AND WORKSHOPS AT SITEVI 2025

SITEVI 2025 will offer a packed programme comprising more than 55 talks and workshops. Presented by experts, these events will address the major challenges facing the wine, fruit and olive growing sectors. These sessions will bring together top-level specialists to analyse major developments in the sector, share the latest innovations and provide concrete solutions to the issues encountered in the field. Key topics will include **climate change, vineyard sustainability, organic viticulture, oenology, digital technology and precision technologies**. Organised by the exhibition's partners, including the IFV, France Olive and the Union des Œnologues de France, these events attract an average of 3,000 participants over three days, with 200 speakers.

DISCUSSIONS FOR BETTER INSIGHT INTO THE ISSUES AROUND DIGITAL FARMING

Theme-based talks and workshops will help visitors appreciate the tangible benefits of digital technology, evaluate the return on investment of innovations and better understand the steps involved in adopting these tools. These highlights will bring together researchers, farmers, manufacturers and start-ups to exchange views and share feedback.

This year, IFV and its research, development and training partners will offer live content themes that lie at the very heart of winegrowing challenges today:

- **Climate change**
- **Vineyard sustainability**
- **Digital tech**
- **Oenology**
- **Organic winegrowing**

TESTING MASTERCLASSES

This must-see feature offers professionals a deep dive into the diversity of winegrowing, olive and fruit growing terroirs. Organised by IFV, France Olive and Œnologues de France, it offers a rich programme of masterclasses in which attendees can taste wines, olive oils and fruit. Presented by winemakers, producers and experts, more than 20 sessions will shine a light on grape varieties, assemblages, exceptional olive oils and the iconic fruit of certain regions. In 2025, CTIFL is joining SITEVI as a new partner, with a focus on fruit through a range of special features emphasising the abundance and diversity of French production.

JOBS AND TRAINING AT SITEVI

To promote recruitment in the wine, olive and fruit growing sectors, SITEVI 2025 is once again joining forces with the teams at **Jobagri** and **Vitijob** to organise **job dating** sessions during the three days of the exhibition (forum in Hall B5). This initiative provides a concrete opportunity for talent-seeking companies to meet directly with qualified candidates— young graduates, employees looking for a career change, or job seekers — in a setting conducive to discussions. It is a real boost for quickly identifying suitable profiles and possibly finding that rare gem. In terms of education and training, students will be able to discover the training programmes provided by several organisations such as APECITA and APRODEMA.

BUSINESS MEETINGS: BRINGING PROJECTS TO FRUITION

arranged and entirely free meetings allow visitors with projects to meet directly with exhibitors, promoting the emergence of practical solutions for their initiatives. Building on its success in 2023, the programme will be repeated in 2025 with an even greater ambition: help visitors make the most of their time and boost business opportunities for exhibitors.

BUSINESS ANGELS: AN EVENING TO CONNECT INNOVATION AND INVESTMENT

On Wednesday 26 November, an exclusive 'Business Angels' evening will be held in Hall B5. This special event aims to create a unique platform for discussion, bringing together investors, innovative start-ups, manufacturer exhibitors and French and international project developers. There is one clear goal: to accelerate the growth of companies specialising in new technologies by promoting strategic connections and investment opportunities.

FOCUS ON LAB TECH

at SITEVI 2025

The search for new technological solutions is becoming an essential priority for producers, whether to compensate for a lack of manpower, improve productivity or safeguard working conditions. In a context where the wine, fruit and olive sectors are facing major climatic, economic and social challenges, **technological innovation is asserting itself as a real driver of performance and sustainability**. SITEVI is aware of this challenge and gives pride of place to companies that develop concrete and innovative solutions. It was in this spirit that the LAB TECH space was created in 2023, in partnership with **Agri Sud-Ouest Innovation, La Ferme Digitale and La Wine Tech**.

Whether autonomous robots, smart sensors, decision-making tools, plot management software and connected solutions: the technologies presented at SITEVI – and particularly in **LAB TECH** – provide concrete answers to the daily challenges faced by producers.

Situated in the middle of Hall B6, LAB TECH this year will bring more than **10 companies** to present their cutting-edge solutions. Designed as a place for experimentation and sharing, this space encourages direct exchanges between exhibitors and visitors. Professionals can discover the latest breakthroughs and also attend **talks and round tables** to address specific issues and identify performance drivers for their farms.

To know more:



karnott.fr



mylmc.fr



winepilotbyfoodpilot.io



agrobit.ag



sas-couchet.fr



wineriz.fr



mycea.fr



dansmabouteille
dansmabouteille.com



dacadn.fr/accueil



In partnership with:



TASTING

masterclasses program

A TASTING FORUM TO TAKE A TRIP TO THE HEART OF TERROIRS

Another major highlight of the show, this area offers professional visitors a deep dive into the sensory wealth of winegrowing, olive and fruit growing regions. Through a varied programme comprising more than 20 masterclasses, SITEVI shines a light on the extensive diversity of grape varieties, assemblages, fruit and olive oils produced thanks to exacting know-how and extreme finesse. Designed and presented in partnership with IFV, CTIFL, France Olive and the Union des Œnologues de France, the tasting masterclasses will bring together winemakers, producers and experts who will share their passion and product knowledge with pedagogy and precision.

Each session is a chance to enjoy a unique experience where professionals will be able to refine their palate, discover often unknown regional specificities, and discuss the leading oenological, fruit and olive trends. The goal here is to promote products, positive impact practices and trigger encounters around quality, innovation and terroir. This event regularly accommodates several hundred participants who come to improve their expertise in a setting that is professional, convivial and stimulating.

	MARDI 25 NOVEMBRE	MERCREDI 26 NOVEMBRE	JEUDI 27 NOVEMBRE
9:30-10:00	AI and wine: how to rethink assemblage / Organised by: Institut Français de la Vigne et du Vin	 Dive into the world of alcohol-free wine / Organised by: Institut Français de la Vigne et du Vin	Vinifying without sulfites: successful examples! / Organised by: Institut Français de la Vigne et du Vin
10:00-10:30			
10:30-11:00	Discovering varieties of the past and the future / Organised by: Institut Français de la Vigne et du Vin	 Vinifying without sulfites: successful examples! / Organised by: Institut Français de la Vigne et du Vin	Singularity and diversity of French olive oils / Organised by: France Olive
11:00-11:30			
11:30-12:00	Overview of rosé wines from around the world, VINALIES Mondial du Rosé 2025 shortlist / Organised by: Œnologues de France	 Sparkling wines: myths and realities / Organised by: Œnologues de France	French PDO olive oils: when the terroir makes the taste / Organised by: France Olive
12:00-12:30			
12:30-13:00	Overview of rosé wines from around the world, VINALIES Mondial du Rosé 2025 shortlist / Organised by: Œnologues de France	 Sparkling wines: myths and realities / Organised by: Œnologues de France	AI and wine: how to rethink assemblage / Organised by: Institut Français de la Vigne et du Vin
13:00-13:30			
13:30-14:00	 From white to rosé: the Mediterranean's varieties of the future / Organised by: Institut Français de la Vigne et du Vin	French olive oils: discovering new productions / Organised by: France Olive	Discovering varieties of the past and the future / Organised by: Institut Français de la Vigne et du Vin
14:00-14:30			
14:30-15:00	 Discovering varieties of the past and the future / Organised by: Institut Français de la Vigne et du Vin	Taste of fruit: measurement methods and quality parameters / Organised by: CTIFL	Blind tasting - olive oil without a label / Organised by: France Olive
15:00-15:30			
15:30-16:00	 Dive into the world of alcohol-free wine / Organised by: Institut Français de la Vigne et du Vin	Matured olives / Ripe olives - what difference in the oil? / Organised by: France Olive	From white to rosé: the Mediterranean's varieties of the future / Organised by: Institut Français de la Vigne et du Vin
16:00-16:30			
16:30-17:00	 Introduction to French olive oil tasting - Discover the three taste families / Organised by: France Olive	Taste of fruit: measurement methods and quality parameters / Organised by: CTIFL	 Traduction simultanée en anglais

ATELIERS DE DÉGUSTATION SUR INSCRIPTION

- France Olive
- Union des Œnologues de France
- Institut Français de la Vigne et du Vin (IFV)
- Le Centre technique interprofessionnel des fruits et légumes (CTIFL)

Organized in partnership with:



Talks and workshops program

SITEVI 2025 is laying on an exceptional programme comprising more than 55 talks and workshops. Presented by more than 200 experts and specialists and organised in partnership with leading stakeholders such as the IFV, France Olive and the Union des Œnologues de France, these talks and debates attract an average of 3,000 participants over three days.

The winegrowing and winemaking sector will address strategic issues such as precision viticulture, adaptation to climate change, organic viticulture, robotics and AI applied to wine production, and the evolution of oenological practices. The olive oil sector will highlight technical innovations and the promotion of French production, with a focus on adapting olive growing to climatic conditions. Finally, the fruit growing sector will offer talks on the agroecological transition, production challenges and the challenge of diversification.

TUESDAY 25 NOVEMBER 2025

TIME	TOPIC	ORGANISATION	ROOM	TRANS.	TYPE
9:00 -9:45	Regional branding and wines: what synergies for better marketing?	REGION OF OCCITANIE PYRÉNÉES MÉDITERRANÉE	A		
9:15-9:40	Olive Growing Technical Day Why talk about olive growing today?	FRANCE OLIVE	C		
9:30-10:15	Support for the use of plant protection products	INRAE x UNISSON	D		
9:30-11 :00	New viticultural practices for the sustainable management of resistant varieties	IFV x INRAE	B		
9:40-10:50	OLIVE DAY – Successfully planting a fruit hedge	FRANCE OLIVE	C		
10:00-11:30	Key drivers for a profitable and eco-responsible vineyard: 8 years of performance-supporting innovations dedicated to Vin de France	IFV x ANIVIN	A		
10:30-11:15	50 Shades of Red: characterising sensory perception	INRAE	D		
11:00-12:15	OLIVE DAY – Adapting growing practices to your production conditions after planting	FRANCE OLIVE	C		
11:15-12:30	Risk prevention in agricultural machinery through innovation	STUDIO NYX x MSA	B		
11:30-12:15	Identification of emerging pests	IFV	D		
11:45-12:45	INTERNATIONAL WINE IN BOX COMPETITION: Presentation of competition winners	BEST WIN IN BOX	A		
14:00-14:45	OLIVE DAY – The French Olive Oil Market : realities, opportunities and limitations	FRANCE OLIVE	C		
14:00-15:00	How AI is already being used in winemaking professions	ŒNOLOGUES DE FRANCE	A		
14:15-15:45	From vine to winery: how to optimise water management in Occitanie	OCCITANIE REGIONAL CHAMBER OF AGRICULTURE	B		
14:45-15:45	Presentation in partnership with the University of Athens on on the Interest of the Crabtree negative effect of the yeast species Pichia kluyveri on rosé wines	VINSEO x NOVONESIS	D		
15:00 -15:45	From vine to glass: logistics at the heart of the customer experience	WINE TECH	A		
15:00-16:00	OLIVE DAY – How much does it cost to produce olive oil in France?	FRANCE OLIVE	C		
16:00-17:00	OLIVE DAY – Round table – Producing olive oil for which markets?	FRANCE OLIVE	C		
16:00-17:00	Living soils for sustainable yields: a region-by-region approach to get started	CELESTA LAB	A		
16:00-17:30	PARSADA, a powerful tool for innovation in controlling downy mildew and black rot	IFV	B		
16:00-17:30	Enjoying a winemaking career: setting up, passing on, and retirement planning	OCCITANIE REGIONAL CHAMBER OF AGRICULTURE	D		
17 :00-17:30	OLIVE DAY – Setting up in olive growing: sector issues and collective responsibilities	FRANCE OLIVE	C		

Talks and workshops program

WEDNESDAY 26 NOVEMBER 2025					
TIME	TOPIC	ORGANISATION	ROOM	TRANS.	TYPE
9:00-9:45	Agricultural photovoltaics: shading, producing, diversifying	REDEN SOLAR	A		
9:00-9:45	INTERNATIONAL ROUND TABLE	CEEV	B		
9:30-10:15	Which varieties for Occitan winegrowing tomorrow?	INRAE	D		
9:30-11:00	TALK & DEBATE– How does research & development contribute to the sustainability of estates?	OCCITANIE REGIONAL CHAMBER OF AGRICULTURE x IFV	C		
10H-10H45	Viticulture: the organic sector under challenge	WONDERLAND AGENCY	B		
10:00-11:00	New products and new consumption patterns	CENOLOGUES DE FRANCE	A		
10:30-11:15	Marketing of wines from resistant varieties	INSTITUT AGRO	D		
11:00-12:30	AWARD CEREMONY: “LES REMARQUABLES 2025”	INTERFEL-CTIFL	B		
11:15-12:00	Agricultural robotics: : Overview of national and regional strategies for structuring the sector	AGSOI x FIRA	A		
11:15-12:45	TALK & DEBATE– From strategic foresight to the field: what levers are being tested in Mediterranean winegrowing to adapt to increasingly dry conditions?	IFV x CHAMBRE RÉGIONALE D'AGRICULTURE D'OCCITANIE	C		
11:30-12:30	New wine- and grape-based products: controlling processes and stabilisation	CENOLOGUES DE FRANCE	D		
12:00-12:45	I've adopted a robot – what you need to know!	AGSOI x FIRA	A		
14:00-14:45	Varietal diversity & plant quality: new indicators and tools	IFV	C		
14:15-15:15	ORGANIC TALK – Focus on emerging pests in organic growing	IFV x SUDVINBIO	D		
14:15-15:45	Viticulture: equipping the agroecological transition	OCCITANIE REGIONAL CHAMBER OF AGRICULTURE	A		
14:15-15:45	No/Low and fresh wines: from vinification to finished product	IFV x VINSEO	B		
15:00-15:45	Innovation and the environment: still compatible?	IFV	C		
15:30-17:00	Choosing the right olive varieties: balancing terroir, markets, and constraints	FRANCE OLIVE	D		
16:00-16:45	Coping with climate change: The CUMA experience using frost fans in Centre-Val de Loire (SICTAG project)	FNCUMA VAL DE LOIRE	C		
16:00-17:00	How to comply with the new labelling standards?	WID GROUP	A		
16:00-17:00	Circular economy: Franco-Spanish cooperation in innovative circular solutions	AGSOI	B		
17:00-17:45	Have your say: pros and cons of adopting a robot on the estate	AGSOI x FIRA	B		
17:00-17:45	Deployment of biocontrol in France: successes, challenges, and prospects	FRANCE BIOCONTRÔLE	A		
17:00-17:45	Oxygen and perfect balance! Latest knowledge and practical applications	DIAM x VIVELYS	D		
17:00	BUSINESS ANGELS EVENING	SITEVI	C		

 Events*
  Talks *
  Workshop*

* Rooms B and C will have English translation on Tuesday, Wednesday (all day), and Thursday (until 1:00 pm).

Talks and workshops program

THURSDAY 27 NOVEMBER 2025

TIME	TOPIC	ORGANISATION	ROOM	TRANS.	TYPE
9:30-10:15	Mitigating the impact of climate change: contributions from phenotyping and modelling	INSTITUT AGRO	D		
9:30-11:00	Farmers: get ready for the shift to electronic invoicing	CERFRANCE	A		
9:30-11:00	Adaptation strategies for the Occitanie wine industry in response to new consumer trends: which products for which markets?	REGION OF OCCITANIE PYRÉNÉES MÉDITERRANÉE	B		
9:30-11:00	Data: the essential shift for the sector	LA WINE TECH	C		
10:30-11:15	What factors contribute to dieback and mortality? The case of the Grenache grape variety in the Mediterranean region	IFV x OCCITANIE REGIONAL CHAMBER OF AGRICULTURE	D		
11:15-12:45	Viticulture in transition: news, results, and feedback from the field to rethink vine protection	IFV x INRAE	A		
11:15-12:45	Vineyard irrigation at a time of climate change: what strategies depending on production goals?	VINSEO x ITK x BRL	B		
11:15-12:45	Microorganisms & flavours: latest innovations from grape to bottle	IFV x INSTITUT AGRO	C		
11:30-12:15	Innovation and sustainability in wine cooperatives in response to climate change	INSTITUT AGRO	D		
12:15-13:00	How to diversify your estate by growing pistachios	FRANCE PISTACHE	D		
14:15-15:15	ORGANIC TALK – Sulphite-free wines: organic production methods, consumer expectations and acceptance	IFV x SUDVINBIO	B		
14:15-15:45	Farming employers: recruit, motivate, optimise, retain!	CERFRANCE	A		
14:15-15:45	AI: what potential for the sector?	LA WINE TECH	C		
14:15-15:45	Living soils, the invisible pillars of sustainable viticulture: understanding and managing the soil microbiome – for what benefits?	VINSEO x INNOVIN	D		
15:30-16:30	ORGANIC TALK – News from the organic wine sector	SUDVINBIO x IFV	B		
16:00-16:45	How to adopt agritourism to diversify your activities	COFARMING	A		
16:00-17:30	Relocating the Vassal collection: issues around preserving global genetic diversity for the benefit of the sector	INRAE	C		
16:45-17:30	Winegrowing & cosmetics: new opportunities for the industry	COFARMING	A		
17:00-17:45	Trees: vineyards' best ally against aridity and climate challenges	ARBRES & CIVILISATION	B		

 Events*  Talks *  Workshop*

* Rooms B and C will have English translation on Tuesday, Wednesday (all day), and Thursday (until 1:00 pm).

FIND THE FULL PROGRAMME, UPDATED IN REAL TIME, ON THE WEBSITE



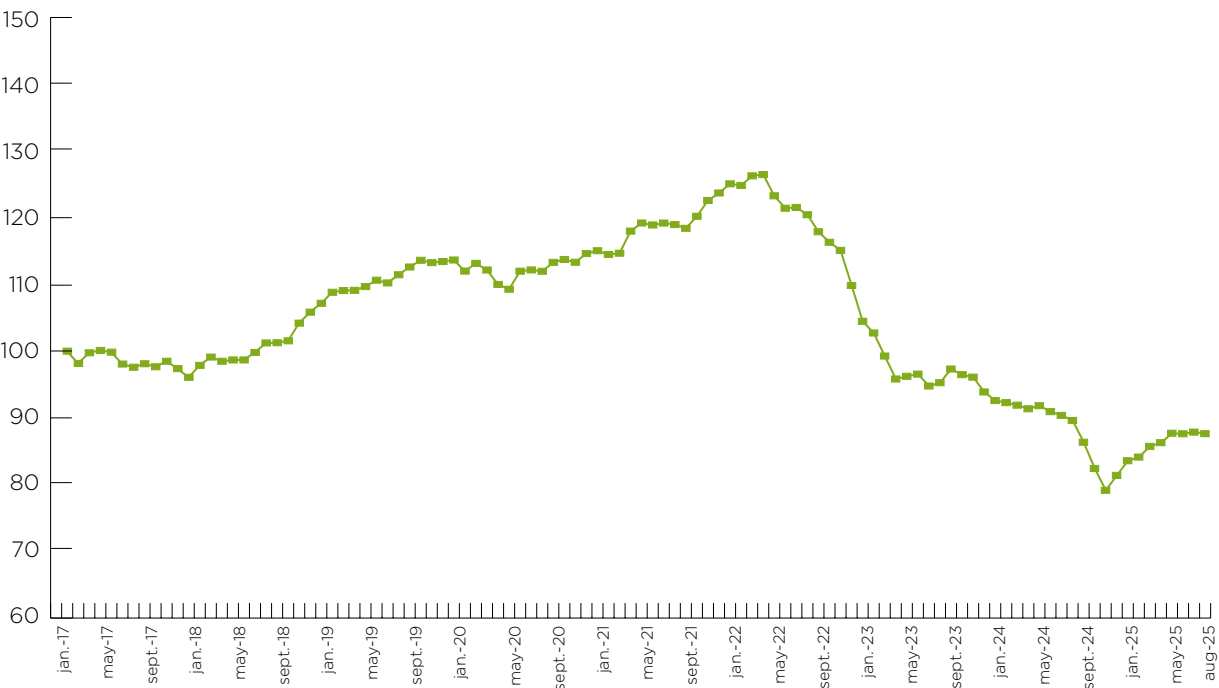
OVERVIEW

of the agri-business market
in Europe and France

Business climate by sector of activity

Farm speciality	May 2025	June 2025	July 2025
Tractors	3	-22	-20
Harvesting equipment	10	-19	-8
Arable equipment	3	5	-14
Livestock equipment	64	54	58
Grassland maintenance equipment	3	-25	-23
Transport technology	10	7	5
Parts and components	-5	32	7
Overall	7	4	0

AXEMA index, Order intake by volume (AXEMA, June 2025)



Source: AXEMA

Key figures for viticulture & winemaking equipment

31

BUSINESSES

The viticulture and winemaking equipment industrial base (manufacturers and importers) is made up of 31 businesses, of which 27 in viticulture and 4 in winemaking

77%

SME

(23 Viti and 1 wine)

23%

MID-SIZED

(4 Viti and 3 wine)

30%

OF TURNOVER IS EXPORTED

In 2023, winegrowing equipment made in France was exported to 38 countries around the world. The main export markets were Spain, Italy, USA, Germany and Australia

2,581

EMPLOYEES

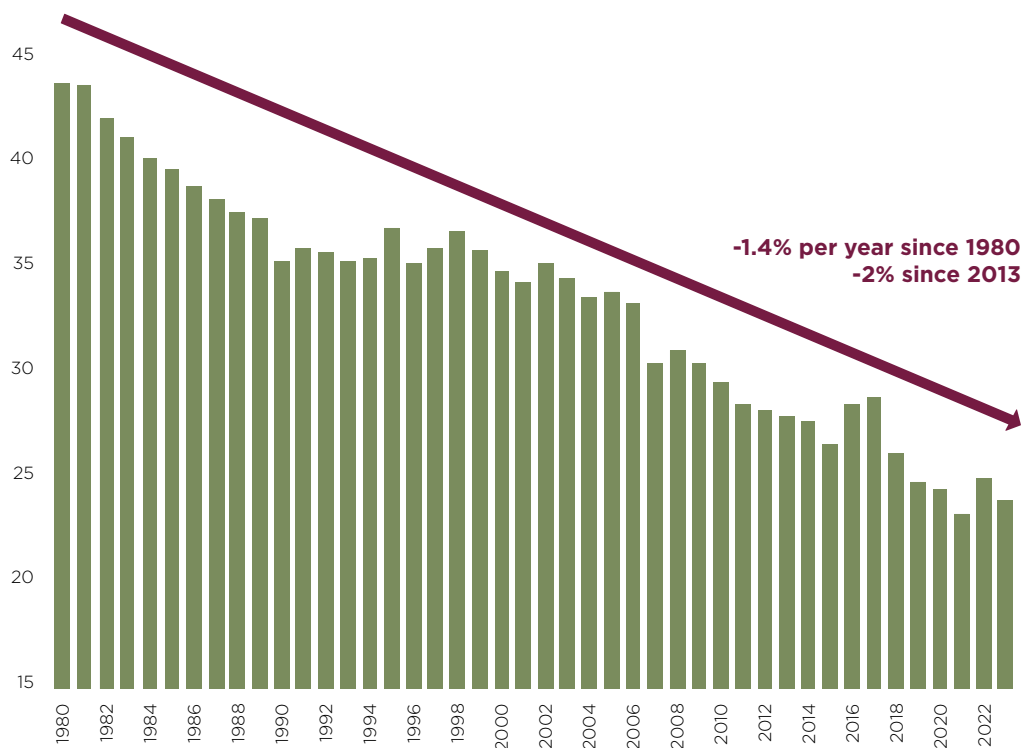
Manufacturers and importers of winegrowing and winemaking equipment employ 2,581 people (+6% between 2020 and 2022).

€670 M

TURNOVER

Total turnover, encompassing sales generated in France and abroad, by companies specialising in viticulture and winemaking equipment

nationwide consumption by volume has been regularly falling for more than 40 years

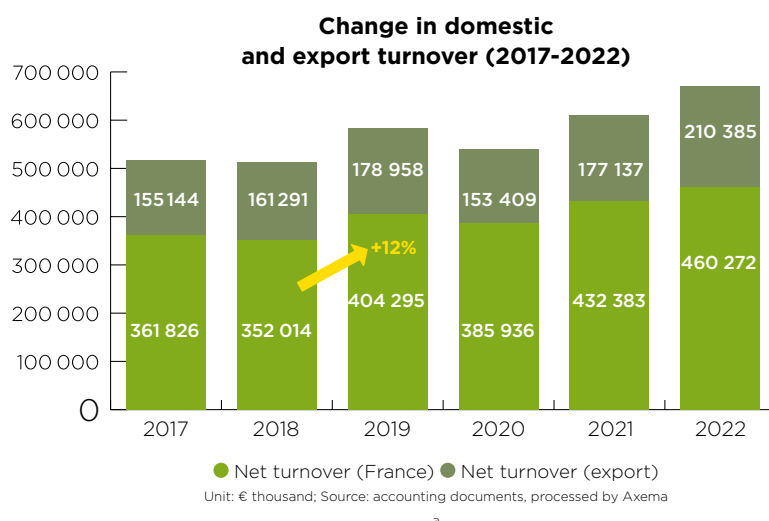


Why such a decline?

Lower wine consumption primarily **concerns red wine**

- This decline is part of a trend of lower consumption of alcoholic drinks in general
- Wine has for several years suffered from competition, among lower-alcohol drinks, from beer
- Wine drinking is becoming increasingly infrequent with each successive generation
 - The inflationary trend of wine is holding back demand

Change in export and domestic turnover generated by manufacturers and importers of winegrowing and winemaking equipment (2017-2022)



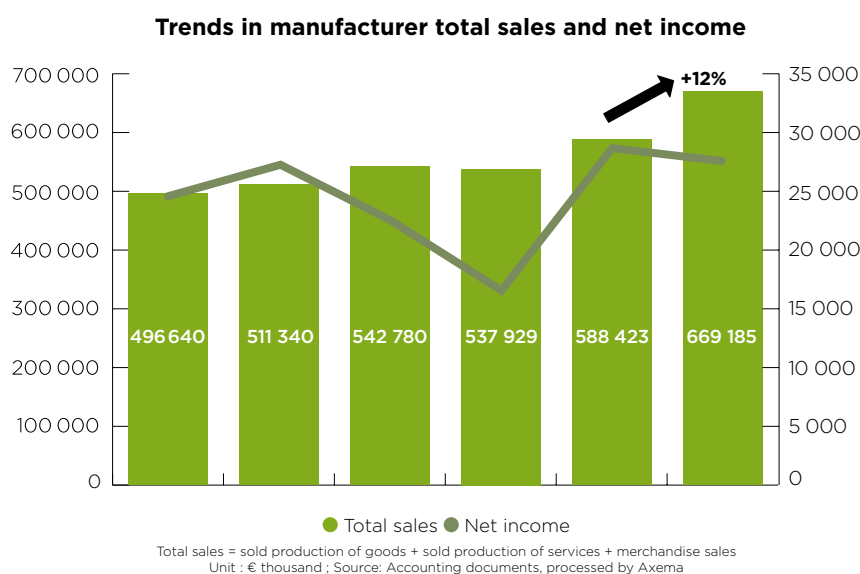
- Domestic turnover accounted for between 69% and 71% of total sales between 2017 and 2022.

- Export turnover has increased over the years despite a drop in 2020 when it sank back to 2017 levels. It picked up again in 2021 and 2022.

- Export turnover accounted for 30% to 31% of total sales.

- Exports have experienced stronger growth in recent years, which would indicate more international opportunities.

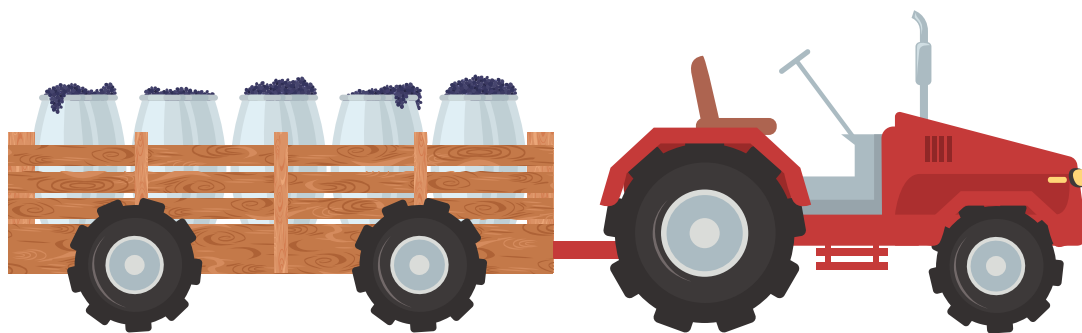
Total industrial sales are increasing regularly, despite a fall in 2020. Net income is variable, underlining the impact of costs and market conditions on profitability



- Total sales generally rose between 2017 and 2022, with a significant hike in 2021 and 2022. A slight drop observed in 2020 could be attributed to economic and trade disruption.

- Net income (profit) was more volatile, peaking in 2018 before declining, in particular in 2020, then bouncing back in 2021.

- The relationship between sales and profit is not proportional, suggesting that other factors such as cost control or market conditions influence profitability.



-24.52%

**Sales of vineyard
& orchard tractors
in 2024**

2534

Number of machines
registered

-24.52%

Rate of change
compared with same
period (y-o-y)

+24.28%

**Sales of
straddle tractors
in 2024**

558

Number of machines
registered

+24.28%

Rate of change
compared with same
period (y-o-y)

-10.8%

**Sales of grape
harvesting
machines in 2024**

322

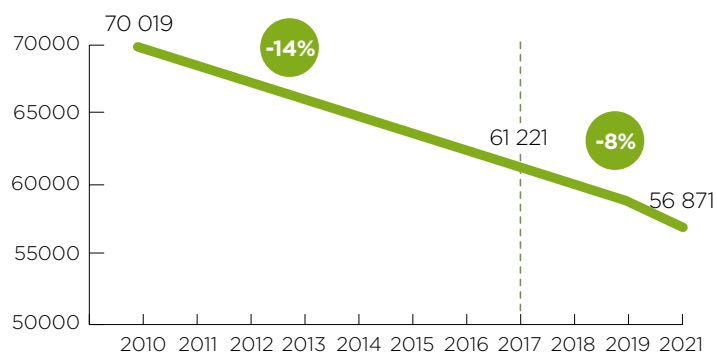
Number of machines
registered

-10.80%

Rate of change
compared with same
period (y-o-y)

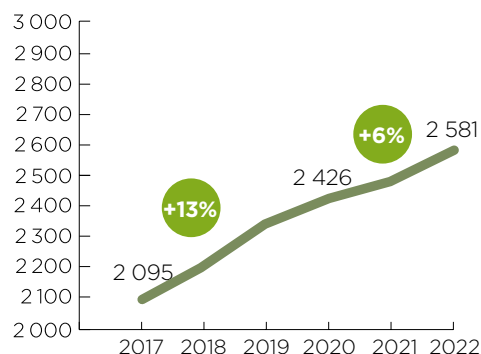
**A scissor effect between fewer winegrowers
and more employees in the winegrowing sector**

**Continuous fall in number of winegrowers
between 2010 and 2021**



Source : Agreste censuses

**Constant increase in number of
employees in winegrowing sector
between 2017 and 2022**



Source : Accounting documents, processed by Axema

LETTER FROM

Occitanie Regional Authority



THE REGION
REMAINS FULLY
MOBILISED TO
DEFEND THE
KNOW-HOW AND
PRODUCTION
OF OCCITANIE



CAROLE DELGA
chairwoman of Occitanie
/ Pyrénées-Méditerranée
Regional Authority

“

The tradeshow SITEVI is much more than an industry exhibition: it is a showcase of the know-how, innovation and resilience of a whole segment of our regional economy: we are the leading region in France for organic production, with more than 250 products under official quality labels; and, as the number one wine producing region for protected denomination wines, Occitanie is also the biggest wine producing region in Europe.

Here in Montpellier, an entire industry comes together to build the future. A future that we want to be sustainable, innovative and true to our roots. At a time of climate change, market instability and profound modifications in wine habits, we must, more than ever, support our farmers and growers in adapting their methods, modernising their production assets, and promoting their products.

The Regional Authority has been responding to these challenges for several years already, by deploying and reinforcing a true regional strategy to support the development and transformation of the supply chain. Since 2016, more than €10 million euros have been contributed by the Region to winegrowing organisations. With the creation of our regional agricultural land fund, the first in France, the deployment of our sustainable agriculture contracts, or the planting of wine varieties that are resistant to the main diseases and drought, we are innovating alongside professionals to transform farming practices.

This is also the ambition of the winegrowing vertical contract, the culmination of several months of work with all the winegrowing stakeholders, which bring with it €5 million of funding over three years. This will facilitate the gradual implementation, starting in autumn 2025, of 15 new ambitious actions, the first among them being the creation of a unique and exhaustive economic market observatory for the benefit of Occitania's winegrowing businesses.

Finally, we are continuing to promote local consumption through the development of the brand “Sud de France – l'Occitanie”, a promotional drive that benefits our wine and food producers and raises the profile of our region. The Authority remains fully mobilised to defend the know-how and production of Occitanie!”

”

A PARTNER OF SITEVI

the Occitanie / Pyrénées-Méditerranée Regional Authority takes action to support the wine sector

The Region and the entire wine sector are rallying together under the coordination of the Occitanie Regional Chamber of Commerce to build and share a common vision for winegrowing up to 2035. Following the July 2024 adoption of Act I of the winegrowing sector contract, earmarking an additional €5 million of regional aid dedicated to the sector, the Region adopted Act II in December 2024 which will enable the deployment of 15 new regional actions starting in September 2025. These include the following.

WINTER SOIL WATER RECHARGE: THE SOLUTION OF THE FUTURE TO LIMIT WATER STRESS IN VINEYARDS

Capitalising on soil water recharge at the end of the winter to provide the vines with better conditions as they begin their growth, to make them more resilient in the heat of the summer. In an initial stage, an experiment will be conducted on two pilot sites in the east of the Occitanie region - in Ouveillan (Aude) and around Gignac (Hérault), zones that in recent years have suffered from winter droughts.

NEW CLIMATE AND SOCIETAL PRESSURES: THE VARIETIES OF THE FUTURE FOR THE OCCITANIE WINE REGION

Providing winegrowers, winemakers and sellers with the key information and data that will lead them to plant, vinify and market the grape varieties suited to the Occitania wine-producing region and meeting the three pillars of sustainability (societal, environmental and economic). From 2025 onwards, tests will be run in the form of the micro-vinification of certain identified varieties.

RESILIENCE OF THE WINEGROWING SOIL OF OCCITANIE: AN ONLINE PLATFORM FOR SOIL WITH MORE LOCAL ORGANIC MATTER

Offer a unique interactive platform collating all the information and partners that are needed to facilitate the supply of local organic matter (green waste, livestock manure and distillery byproducts) to Occitanie's winegrowers. Additionally, the setting up of at least three local supply chains for local and high-quality organic matter.

SMART AGRICULTURE: KITTING OUT THE OCCITANIE WINEGROWING REGION FOR THE GREEN REVOLUTION THANKS TO ARTIFICIAL INTELLIGENCE

Offering winegrowers the chance to gain access to simple and effective AI decision aids on adapting to and mitigating climate change, building on the successful experience in Greece of a company which offers a smart agriculture system. Four pilot cooperatives in 2025 and 45 participating winegrowers in three years before the solution is deployed more extensively.

FROM GRAPE TO WINEMAKING EFFLUENT: MAKING USE OF ALL THE PRODUCTS FROM THE OCCITANIE WINE SUPPLY CHAIN

Creating supply chains to use grapevine products and byproducts from the entire production chain by offering avenues for the development of new markets. A through process revolving around ten main intra-sector diversification avenues for the future.

COORDINATING AND BRINGING TO LIFE THE SECTOR CONTRACT THROUGH THE ESTABLISHMENT OF A CONSORTIUM

The "Vignoble d'Occitanie" consortium bringing together sector stakeholders was recently formed under the aegis of lead member CRAO.

ECONOMIC AND STRATEGIC FORESIGHT OBSERVATORY: COORDINATING THE ECONOMIC FUTURE OF THE OCCITANIE WINE SECTOR, AND FROM CONSUMER BASKET TO FARM PLOT

The establishment of the Economic and strategic foresight observatory aims to bring tangible answers through the acquisition, pooling and dissemination of data (on production, existing markets, consumption, export, etc.) from industry operators, so as to identify priority target markets and prospective target markets that offer growth opportunities. This observatory is designed to enable the sector to identify, both in France and abroad, what type of wine best fulfils the expectations of each category of consumers.

SUD DE FRANCE-L'OCCITANIE, THE HALLMARK FOR OCCITANIE PRODUCTS

Sud de France-l'Occitanie is the regional brand for products from Occitanie. Under a single banner, it comprises nearly **16,000 products** from the agricultural, food, wine and seafood sector, leveraging a commercial strategy consisting of collective promotion on a local, nationwide and international level. In all, **more than 2,000 producers** and businesses are listed across our region.

Sponsored by the Regional Authority for the past 19 years, Sud de France-l'Occitanie has already proven its worth. As a standard bearer for the region, it helps raise the profile of its products, producers and their exceptional know-how far beyond the borders of Occitanie and thus contributes to its reputation and appeal.



SITEVI
INNOVATION
AWARDS

2025

Sitevi Innovation Awards

2025 INNOVATION AWARDS

Trends, innovations and highlights

Following a 2021 SITEVI edition marked by the Covid epidemic and a truly euphoric 2023, the 2025 edition of the SITEVI Innovation Awards, a true showcase of innovation in the wine, fruit, vegetable and olive growing verticals, has returned to its usual scale, with 70 entries amid a crisis in many winegrowing sectors.

The judges initially shortlisted 28 entries as nominees, and following an oral interview in October with their representatives, the jury will establish the list of entries that will receive gold, silver and bronze medals. This list will be revealed in November in Montpellier, on the first day of SITEVI.

The innovations presented this year cover an even wider range of equipment, products and services encompassing all facets of winegrowing, winemaking and the fruit and olive sectors.

The crisis experienced today by the winegrowing world, the economic difficulties encountered by estates and the need to adapt production systems to global warming are increasing the requirement for innovation and disruption to improve the competitiveness and resilience of our farms.

While the innovations submitted are very diverse, we can nonetheless distinguish three major trends in terms of innovations:

- The first relates to **convenience, quality of workmanship and user comfort** both in the vineyard and in the cellar, with aspects that simplify work, lighten the workload, save time, or equipment with multiple uses.
- The second trend is to do with **product quality and adaptation to market needs** with ever more sophisticated decision aids along with equipment to better adapt products to changing market demands.
- The final trend, already evident in previous editions, is that of **productivity and resilience**, which comes through maintaining estate and farm competitiveness, the resilience of production systems, and reducing the environmental footprint of wine and fruit growing activities.

It can be noted that digital tech, which has been an important trend in recent years, is no longer qualified as a trend, since it is the central component of many of these innovations. The three trends outlined this year are therefore more

focused on the result than on the means that enable the attainment of these results.

CONVENIENCE, QUALITY OF WORKMANSHIP, USER COMFORT

Increasing productivity is still a topical issue, but this quest for productivity is associated with improving work quality, without affecting the working conditions and safety of operators.

• Reduction of working time

Merely increasing the speed at which work is done can only lead to a deterioration both in the quality of work conducted and in working conditions and health outcomes for drivers. It is therefore by increasing the working width and/or combining several different attachments that productivity can be increased without compromising on quality.

In this perspective, Clemens offers the “**C-Vision Double Sided Pre-Pruner**”, a camera supervised pre-pruner that can work on two rows at the same time, resulting in virtually twice the output.

Another approach comes from Ferrand which presents its “**pre-pruning and minimum pruning combine**” which associated both attachments on the same frame to conduct both tasks on the same run.

Working time can also be reduced by spending less time on preparing and adjusting the settings of machines. In this vein, Pellenc offers the “**Pellenc Easy Adjust**” which is a remotely operated system to change the settings of a grape harvesting machine. The user can check the quality of settings and change them from the field side, without the driver having to get down from the tractor.

Similarly, IFV offers “**Mon Réglage Pulvé**” which is an assistance tool for the settings of sprayers, making choices easier in the field with regard to nozzles, pressure and dosage per hectare, all in the aim of obtaining a top-quality result.

The two latter applications, in addition to saving working time, are also valuable decision aids. And in this area, other products were submitted for our appraisal.

• Decision aids and simplification of work

Productivity increased can be obtained using increasingly sophisticated machines that can often be complex in their use. As a result, decision aids

and systems to simplify operations are developed to reconcile productivity and workmanship.

Here, Bucher Vaslin offers a new high-capacity tangential filter called **FGCM**. The aim is to eliminate settling and racking operations by directly filtering musts and wines without separating out the deposits and lees beforehand.

Meanwhile, Pellenc presents its **“SPC² Smart Press”** which, through advanced automation, simplifies operations by optimising the workings of the press and reducing the time taken to conduct all the tasks from filling to washing the empty press.

Watgrid SA offers its **“WINEGRID Data-driven Assistant”**, a real-time fermentation data supervision application, which enables users to comply with various fermentation protocols and obtain predictive information on the progress of the protocol currently underway.

In the winegrowing machine field, we can find the same quest for simplification combined with productivity and quality of workmanship.

This is what New Holland offers with its **“HTS II: Headland Turn Sequencing II System”** whose goal is to substantially improve driving comfort by reducing the number of times that buttons need to be pressed during turning manoeuvres: these phases are memorised and then executed with successive presses on just one button.

New Holland also presents the **“Vari-Control System”** which is an automatic levelling system for grape harvesting machines, a system that can improve not only machine productivity but also harvest quality and driver safety.

• Equipment versatility

On the subject of work simplification while improving productivity and quality, we also find solutions connected with tool versatility.

In this respect, Terral presented its **“PFA (Pailleuse - Faucheuse - Andaineur)”** standing for ‘mulcher, mower, rake’, a three-in-one tool that can mulch the vineyard, mow the plant cover and rake up vine shoots and other pruning waste.

Pellenc also aims for versatility with its **“OPTIMUM XXL80 range”** tool carrier that can be fitted with a range of attachments including a harvester head to collect different types of fruit (grapes, almonds, plums, etc.) meaning that this machine can be used fully six months of the year.

New Holland offers its take on versatility with its **“POWERBOX CONCEPT”** a family of robots for specialist crops which can work in a herd with the existing machines on the farm or estate.

Finally, on the edges of the notion of versatility, we can find retrofitting solutions that help increase the performance of existing machines and make them more versatile in terms of their functions. Such is the case with Spezia srl which presents its **“IN.NO.VA.R. Retrofit Kit”**, made up of cameras and sensors, PWM nozzles etc, which transforms a basic fixed dose sprayer into one that can vary each nozzle's dosage individually.

PRODUCT QUALITY AND ADAPTATION TO MARKET NEEDS

With the wine sector experiencing many challenges, it is no longer enough to simply produce good quality wine. Consumer demands are evolving, and one of the trends at these SITEVI is innovative equipment and solutions whose aim is to better cater to these ever-changing expectations.

• Adapting to market demands

This adaptation to demand can lead to a very wide palette of products, with the corollary being that each is produced in relatively low quantities. To meet this requirement, Bucher Vaslin presents its **“Origin N2”**, a small open or closed cage grape press with the harvest and juices maintained in an inert atmosphere during filling and pressing. This press helps obtain high-quality musts with low volumes.

Meanwhile, Laboratoires Dujardin-Salleron offer **“CREAWINE”** which is a modular platform for wine and innovative drinks. This set of three modules (de-alcoholization, extraction and carbonation) is designed to create new drinks based on grapes.

Pellenc has developed the **“SMART WINELYSE”** which is a vacuum-operated must and wine partial dealcoholization unit, with which the amount of alcohol in the wine can be finetuned in accordance with marketing goals.

Finally, Diam bouchage offers the new natural cork for still wine, **“Diam Collection”**. The cork addresses the wine market that uses top-end corks.

• Decision aids

Obtaining high-quality products is the result of a very fine alchemy which is becoming increasingly difficult to master. Decision aids are valuable tools to obtain the desired outcomes, or even to create new, hitherto unsuspected possibilities.

In this area, M&Wine has developed the **“Wine Digital Twin”**, an artificial intelligence platform that draws on the mineral profiles of wines, which are both unchangeable and impossible to fake. From the collection of a multitude of mineral profiles, the M&Wine solution associates these profiles with quality criteria, thereby providing innovative assistance when assembling different cuvees.

Parsec presents its **“EVO2 Ferm Plus”**, a mobile unit to supervise fermentation and the dosing of nutrients and oxygen. The unit identifies, calculates, doses and adjusts the nutrients needed by yeasts, and assists users in obtaining the desired oenological profiles.

Finally, Onafis presents **“Alkios”**, a smart and connected alcohol meter that measures the alcohol content of spirits in real time, in their vat, without no sampling required. Interfaces with a level sensor, Alkios turns the chore of customs inventory into a simple and useful data for managing formulations.

ESTATE PRODUCTIVITY AND RESILIENCE

Farm output is dependent on both soil and the climate, and certain innovations are developed to maintain, as far as possible crop productivity, and at least improve their resilience to increasingly strong impacts.

• Crop productivity

With regard to the soil, Mycea offers the services **“MYCOTERROIR”** whose aim is soil regeneration suited to each terroir, with a view to reducing the use of inputs, increasing the climate resilience of grapevines and plant matter in general, improving soil structure and reducing losses.

Bienesis offers a solution to protect crops against increasingly violent climate events with the vineyard cover solution **“Canopée”**. It is original insofar that it is deployed only when needed, and can then be retracted into holders to make it almost invisible, and therefore compatible with the specifications of many PDOs.

For its part, IFV has developed **“Résiste-moi si tu peux”** (resist me if you can) which is a serious game to support the deployment of grape varieties that are resistant to downy or powdery mildew. With this entertaining game, the user gains an understanding of the concepts surrounding the host-pathogen interaction. The game aims to achieve better deployment of resistant grape varieties, and make these resistances last longer by preventing the pathogen from overcoming the resistance.

• Reducing environmental impact

In this optic of reducing the impact on the environment, Hello Nature offers **“Keylan Fe Liquid”**, a naturally sourced biostimulant offering the same effects as synthetic chelates but with very low environmental impacts, contrary to the synthetic product.

Also in the aim of reducing environmental impact, MCC Label offers **“EnviroMetal™”**, an eco-friendly alternative to traditional gilding. The product replaces gilding in the wine label printing process, with 1kg of ink replacing 3,000 kg of gilding waste.

In the packaging field, Smurfit Westrock presents its **“EasySplit Bag-in-Box®”**, a bag-in-box designed to both improve the pack's recyclability and make waste sorting easier for the end user.

In the spraying domain, Kuhn has developed a new atomiser, **“GEO2”** with an innovative turbine from a design perspective. The turbine significantly improves airflow while reducing fuel consumption, and most importantly reducing noise. Indeed, turbine noise is a key factor in the acceptability of these machines.

Finally, to round off this preview, Sabi Agri presents its **“Volcam”** tractor: a small versatile electric tractor that will assist farms in their energy transition and can be used for a wide range of applications, including in closed environments (greenhouses, livestock buildings) where combustion engines cannot be used.

THE NOMINEES

of the SITEVI Innovation Awards 2025

	Entreprise nominée	Innovation
practicality, quality of workmanship and user comfort	Clemens technologies	C-VISION DOUBLE SIDED PRE-PRUNER
	Ferrand	TAILLE INTÉGRALE
	PELLENC	Pellenc EasyAdjust
	IFV	Mon Réglage Pulvé
	Bucher Vaslin	FGCM
	PELLENC PERA OENOPROCESS	SMART PRESS SPC²
	WINEGRID	WINEGRID Data-driven Assistant
	NEW HOLLAND	HTS II : Headland Turn Sequencing II System
	NEW HOLLAND	Vari-Control System
	TERRAL	PFA (Pailleuse - Faucheuse - Andaineur)
	PELLENC	Gamme automotrice OPTIMUM XXL80
	TECNOVICT by SPEZIA	IN.NO.VA.R. Retrofit Kit
	NEW HOLLAND	Plateforme robotique pour vignes et vergers
Product quality and adaptation to markets	Bucher Vaslin	Origin N2
	Laboratoires Dujardin-Salleron	CREAWINE
	PELLENC PERA OENOPROCESS	SMART WINELYSE
	DIAM BOUCHAGE	Diam COLLECTION
	M&Wine	Jumeau Numérique du Vin
	PARSEC	EVO2 Ferm PLus
	ONAFIS	Alkios
Farm productivity and resilience	Hello Nature	Keylan Fe Liquid
	MYCEA	MYCOTERROIR
	Sabi Agri	Tracteur électrique compact VOLCAM
	Bienesis	CANOPEE
	IFV	Résiste-moi si tu peux
	MCC LABEL	EnviroMetal™
	KUHN	GEO 2
	SMURFIT	EasySplit Bag-in-Box®

C-VISION DOUBLE SIDED PRE-PRUNER

Exposant : CLEMENS TECHNOLOGIES
Number of stand: A4 A034



The **C-VISION Pre-pruner** from CLEMENS is a double-row pre-pruner equipped with an automatic opening system based on camera and AI technology, adaptable to any type of stake. This scalable system can be trained to new configurations. It combines height-adjustable pruning (49-95 cm) on a TWINPEAKS mast with angle and width adjustments. Proportional hydraulic control and SMARTI joystick ensure precise positioning. Average speed: 7 km/h.

TAILLE INTÉGRALE

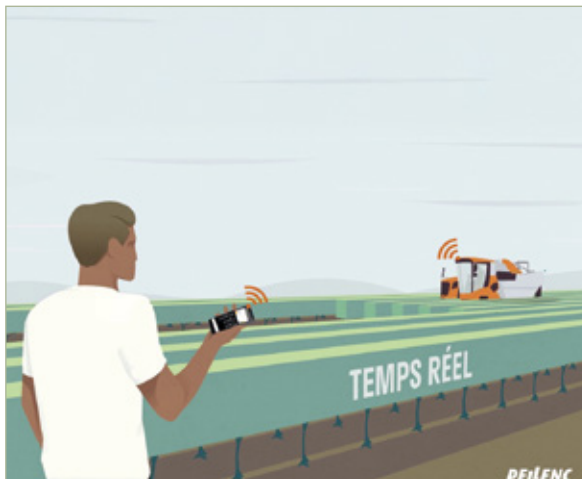
Exposant : FERRAND
Number of stand: B2 B087



The **FERRAND** full-size combination machine combines pre-pruning and mechanical pruning of vines in a single pass. Lightweight and mounted on an inter-row tractor, it reduces fatigue, accident risks, fuel consumption, and soil compaction. Its automatic guidance system (opening at the stake, cord tracking, re-centering) ensures comfort, precision, and high performance. This unique system extends the working window, meets economic challenges, and improves operator well-being.

PELLENC EASYADJUST

Exposant : PELLENC
Number of stand: B2 B056



PELLENC innovates with **EASY ADJUST**, a connected solution that allows machine settings to be adjusted safely from a smartphone or tablet, directly in the row. Based on telemetry and IoT, it offers an ergonomic and secure interface, limiting errors. Compatible with several PELLENC ranges, **EASY ADJUST** simplifies operator-machine interaction for increased precision in viticulture and arboriculture.

MON RÉGLAGE PULVÉ

Exposant : Institut Français de la Vigne et du Vin
Number of stand: B5 A010

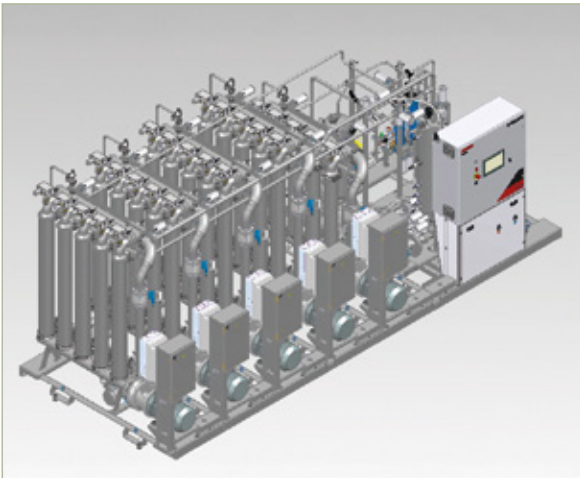


MON REGLAGE PULVE is a free online and smartphone tool that centralizes knowledge and data for adjusting sprayers in viticulture. It includes a training section on spraying and a calculation module to optimize settings. With a database of 162 nozzle/tip combinations, it also provides advice on pressure and nozzle selection, tailored to the specific needs of viticulture.

FGCM

Exposant : *Bucher Vaslin*

Number of stand: **A1 D045**



Bucher Vaslin launches Flavy FGCM, an innovative tangential filter for musts and wines, eliminating the need for settling and racking. Inspired by Flavy FGC and X-Treme technologies, it simplifies processes, treats up to 2,000 hl/day of must and 3,000 hl/day of wine, while guaranteeing quality and reliability. Fully automated and remotely controllable, it reduces water consumption by 30%, lowers operating costs, and lightens the workload in the cellar.

SMART PRESS SPC²

Exposant : *PELLENC PERA OENOPROCESS*

Number of stand: **A1 D044**

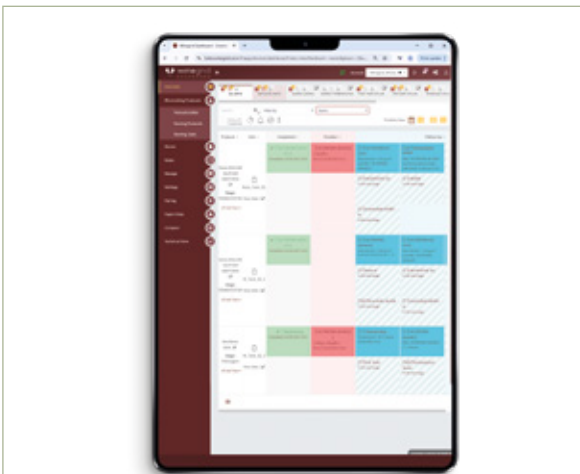


The **SPC²** press from **PELLENC PERA OENOPROCESS** combines oenological performance, simplicity, and connected technology. Equipped with an intuitive touch screen, it ensures safe filling, automates pressing, and guarantees gentle extraction thanks to Fast Press grids. Its Easy Clean system optimizes cleaning. Connected to Pellenc Connect, it offers remote control, traceability, and advanced options for quality control.

WINEGRID DATA-DRIVEN ASSISTANT

Exposant : *WINEGRID*

Number of stand : **A1 C002**

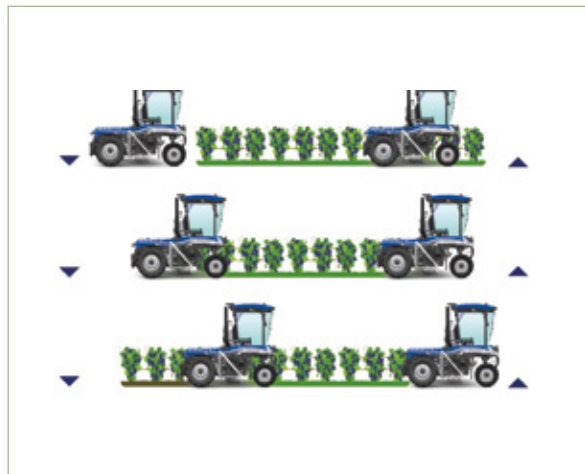


WINEGRID innovates with its Data-driven Assistant, an integrated solution combining Oenosensing® sensors, fermentation protocol management, predictions, and smart alerts. It collects and analyzes data in real time to provide accurate monitoring, anticipate key stages, and automate actions. This technology replaces traditional tools, helping wine-makers improve quality and make better decisions.

HTS II : HEADLAND TURN SEQUENCING II SYSTEM

Exposant : *NEW HOLLAND*

Number of stand: **B2 B017 & B018**



HTS II is a tool management system for straddle tractors during maneuvering phases when entering and exiting vine rows. The driver can manage all tools using a single button. This patented sequencing system simplifies tractor operation, particularly during combined tasks. Fully adjustable to suit different tools and drivers, the system saves all parameters for each tool.

VARI-CONTROL SYSTEM

Exposant : *NEW HOLLAND*

Number of stand : **B2 B017 & B018**



The **Vari-Control** system ensures automatic leveling of the machine at all times during work phases from 0 to 13 km/h. It also offers smooth and rapid emptying of the buckets, resulting in increased productivity. Operator safety during headland maneuvers is significantly improved as soon as the operator activates this system.

PAILLEUSE-FAUCHEUSE-ANDAINEUR

Exposant : *TERRAL*

Number of stand : **B3 B 028**



Terral is presenting the PFA model at SITEVI 2025, a 3-in-1 machine (mulcher, mower, rake) mounted on the front of the tractor. Its unique cutting system protects the vines while cutting the plants. It creates natural mulch, prepares the soil for other tools, and gathers the vine shoots for collection. This innovation optimizes operations in a single pass, promoting the agroecological transition of winegrowers.

GAMME AUTOMOTRICE OPTIMUM XXL80

Exposant : *PELLENC*

Number of stand : **B2 B056**



PELLENC presents the **OPTIMUM XXL80**, a versatile self-propelled machine for vineyards, olive groves, and almond orchards with interchangeable harvesting heads. Comfort, safety, and ergonomics have been optimized. Connected to PELLENC CONNECT, it provides real-time access to machine and agronomic data. Its Dynamic on-board weighing system ensures accurate and continuous monitoring of harvests, for efficient, sustainable, and smart agriculture.

IN.NO.VA.R. RETROFIT KIT

Exposant : *TECNOVICT by Spezia srl*

Number of stand : **B4 B050**



This innovative **retrofit kit** transforms fixed-dose atomizers into real-time variable-dose machines, controlling each nozzle individually. It combines ultrasonic and optical sensors with pulse width modulation (PWM) to precisely adjust flow rate. With a time resolution of 0.1 s, it optimizes spraying, marking a major step forward toward ultra-precise volumetric machines.

PLATEFORME ROBOTIQUE POUR VIGNES ET VERGERS

Exposant : NEW HOLLAND

Number of stand : B2 B017 & B018



Family of autonomous and intelligent traction units (robots) for specialized row crops, capable of performing some of the tasks of a specialized tractor or straddle tractor (approx. 25%) and designed to make certain applications that require less human supervision autonomous.

ORIGIN N2

Exposant : *Bucher Vaslin*

Number of stand : A1 D045



Bucher Origin N2 is a range of pneumatic presses (3, 5, 10 hl) designed for small farms and high-quality batches. The first press to offer pressing under full inerting in an open cage, it protects the harvest from oxygen, preserves aromas and freshness, and reduces gas consumption. Available in open or closed versions, it combines flexibility, hygiene, ease of use, and cost control for plot-by-plot or experimental winemaking.

CREAWINE

Exposant : *LABORATOIRES DUJARDIN-SALLERON*

Number of stand : A1 C063



CREAWINE is revolutionizing the wine industry with a modular technology platform that combines innovation and expertise. Its three modules — VacuTherm (dealcoholization), EcoExtractor (compound recovery), and CarboStream (gasification)— allow for diversification without sacrificing quality or identity. CREAWINE modernizes wineries, enhances the value of grapes, and helps producers adapt to new markets.

SMART WINELYSE

Exposant : *PELLENC PERA OENOPROCESS*

Number of stand : A1 D044

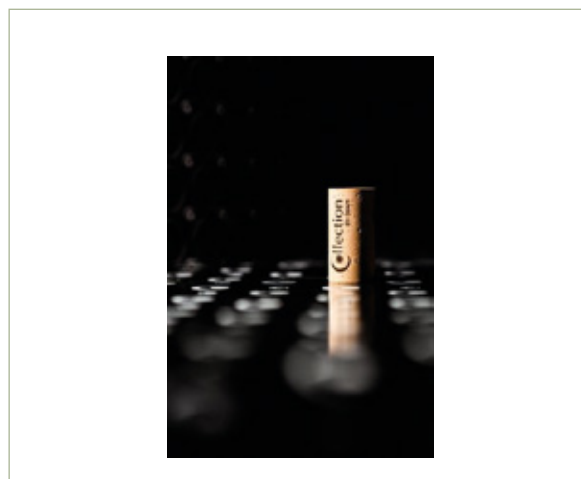


PELLENC launches **SMART WINELYSE**, an innovative solution for de-alcoholizing wines through partial vacuum evaporation, applicable to musts or finished wines. Developed in collaboration with IFV, INRAE, and CRITT, it preserves aromas and colors, creates new taste profiles, and recovers the extracted alcohol. Compact and mobile, the machine reduces alcohol content by up to 6% vol. in a single pass, without altering the taste balance.

DIAM COLLECTION

Exposant : *DIAM Bouchage*

Number of stand : A2 B006



Diam Bouchage, innovating for 20 years, has developed **the Diam Collection cork**, combining organoleptic safety and traditional aesthetics. Composed of a micro-agglomerated Diam cork core and a thin sheet of purified cork, this unique cork meets the expectations of winegrowers. It will be marketed with orders taken at the SITEVI trade show.

JUMEAU NUMÉRIQUE DU VIN

Exposant : M&Wine

Number of stand : A2 B037



M&Wine launches its Digital **Twin of Wine platform**, based on AI and a unique mineral profile of wine (40 minerals). Easy to collect and quick to analyze, this profile ensures traceability, quality, and authenticity. With more than 40,000 profiles, the platform offers customization, decision support for winemaking, and optimization of blends, revolutionizing the wine industry with this strategic data.

EVO2 FERM PLUS

Exposant : PARSEC

Number of stand : A1 D007



EVO2FERM PLUS is an innovative tool that analyzes must and winemaking objectives to identify, calculate, measure, and adjust the nutritional needs of yeasts. It improves aromatic intensity, precisely controls organoleptic profiles, limits corrective interventions, and reduces the use of inputs, thereby meeting market expectations while minimizing the risk of nitrogen residues in wine.

ALKIOS

Exposant : ONAFIS

Number of stand : A2 B041



Alkios is revolutionizing alcohol measurement in spirits with a connected alcohol meter that is fast (30 seconds) and requires no sampling. It ensures accuracy, traceability, and time savings (90%), accessible via the Onafis platform. Suitable for large companies and micro-distilleries, Alkios simplifies customs inventories, reduces losses, and integrates into the demanding environments of cognac, rum, or whiskey.

KEYLAN FE LIQUID

Exposant : *HELLO NATURE*

Number of stand : A5 B017



Keylan Fer is an innovative product from Biochelation®, a liquid iron bound to plant peptides. A sustainable alternative to synthetic chelates (EDDHA), it corrects iron chlorosis with equivalent effectiveness while improving iron absorption. Stable, biodegradable, residue-free, and microplastic-free, it is suitable for organic farming, soluble, effective at various pH levels, and recognized in 2024 by REACH registration as Iron Biochélate..

MYCOTERROIR

Exposant : *MYCEA*

Number of stand : B6 LabTech



MYCOTERROIR is a local, personalized soil regeneration service based on mycorrhizal fungi. Tailored to each terroir, it improves crop productivity, vigor, and resilience while measuring soil health and biodiversity. Through the collection, amplification, and application of local communities, it sustainably increases the agronomic and heritage value of the land and supports winegrowers, farmers, and communities in their transition to regenerative agriculture.

TRAITEUR ÉLECTRIQUE COMPACT VOLCAM

Exposant : *SABI AGRI*

Number of stand : B3 B086

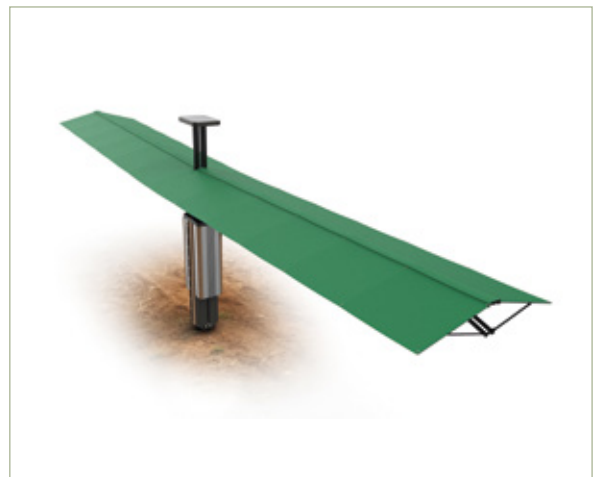


Eco-designed and manufactured in France, **VOLCAM** is a compact, durable, repairable, and recyclable electric tractor. It supports the agroecological transition, particularly in viticulture, combining economic (85% less expensive) and environmental performance. Silent and 100% electric, it avoids 13.3 tons of CO2 emissions per year, offers 10 hours of battery life, fast charging, and a solar panel. Compact and precise, it preserves soil, biodiversity, and comfort.

CANOPÉE

Exposant : *BIENESIS*

Number of stand : A2 B006



After two years of R&D, BIENESIS presents "**Canopée,**" an integrated retractable solution for protecting vineyards against adverse weather conditions. Modular and adaptable to a variety of terrains, it preserves the terroir and vintage, blends in visually, and facilitates agricultural work. Connected and remotely controllable, it effectively secures the harvest: 90% protected in 18 deployments in 2024, compared to 48% without.

RÉSISTE-MOI SI TU PEUX

Exposant : Institut Français de la Vigne et du Vin
Number of stand : B5 A010



“Résiste-moi si tu peux” (Resist me if you can) is a cooperative serious game in which players, who are winegrowers, must manage the use of pathogen-resistant varieties. The goal is to last 10 rounds without the pathogen overcoming the resistance. The game illustrates the challenge of balancing sustainability and profitability by promoting cooperation, strategy, and awareness of current agricultural issues.

ENVIROMETAL™

Exposant : MCC LABEL
Number of stand : A3 C033



EnviroMetal™ offers an eco-friendly alternative to traditional gilding, with a high-end mirror finish thanks to encapsulated aluminum pigments applied to UV primer. Composed of 91% water-based ink, it reduces waste by up to 50% and lowers CO₂ emissions. Flexible and economical, it adapts to a variety of substrates, combining aesthetic performance, 3D customization, and durability.

GEO 2

Exposant : KUHN SAS
Number of stand : B3 B059



The KUH N GEO 2 sprayer, with tanks ranging from 1,000 to 3,000 liters, combines innovation and comfort. Its HF turbine with patented “WAVE BLADE” blades generates a high volume of air while reducing noise and fuel consumption. ISOBUS-compatible with CCI terminals, it offers automatic control, dose modulation, and detailed reports. As an option, the KUHN T1 Box digitizes maintenance via MyKUHN, optimizing the machine's longevity.

EASYSPLIT BAG-IN-BOX®

Exposant : SMURFIT WESTROCK
Number of stand : A3 B005



Smurfit Westrock launches EasySplit Bag-in-Box®, an innovation that complies with PPWR regulations requiring 80% recyclability of packaging. This patented concept facilitates the separation of the bag and the box, allowing for optimal recycling of each component. The result: a recyclability rate of over 90%, ensuring compliance and reducing the environmental impact of Bag-in-Box® packaging.

MEMBERS

of the 2025 jury

To guarantee an in-depth examination of each application and a comprehensive expertise of the markets and sectors represented at SITEVI, the jury is made up of the best specialists from France and abroad.

The panel comprises 20 eminent members: scientific directors, research fellows, engineers, lecturers, and experienced equipment users. This exceptional roll of honour was made possible by combining their different areas of expertise. To appraise each entry in precise detail, the judges also call on assistance from technical experts from their network. In total around 100 specialists offer their opinions to establish the list of winners. Thanks to this collective expertise, **the SITEVI Innovation Awards** have become a benchmark on the market for equipment and know-how in winegrowing, winemaking and olive and fruit & 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"
- JUDGES
- **Eric ARGOLAS**, MSA LANGUEDOC
Risk prevention adviser
- **Laurent BELORGEY**, France Olive
Chairman
- **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
- **Bluenne CHAYE**, LA WINE TECH
PR & Partners
- **Pierre COMPERE**, Cabinet EXPLICITE
Expert agritrch 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 FAUCHERON**, 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

- **Baptiste LABEYRIE**, CTIFL

Centre Technique Interprofessionnel des Fruits & Légumes, research engineer and fruit farming sector expert

- **Guillaume LE GONIDEC**, FNEDT

Fédération Nationale Entrepreneurs Des Territoires, Farming, Environmental & Sustainable Work Officer

- **Valérie LEMPEREUR**, IFV

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

- **Jean-Luc PÉRÈS**, PCMA, Ex Trame BCMA Et APCA

Agricultural machinery expert, consultant, 25 years' experience in agricultural equipment, Project Leader at GIP Pulvé

- **Balkis VICAIRE**, VINSEO

Director



**Wine
sector**

TRENDS

and outlook for the vine-wine sector



CHRISTOPHE RIOU

chief executive of
Institut français de la
vigne et du vin (IFV)

VINE-WINE: INNOVATION MOBILISED TO REINFORCE THE RESILIENCE OF OUR SUPPLY CHAINS

The winegrowing sector finds itself confronted by the challenges of climate change, agroecology, new consumer expectations and economic performance. In these times of difficulty and uncertainty, innovation, research and development are the pillars of resilience and transformation and help foster the emergence of tangible solutions for the benefit of communities, winegrowers and the supply chain as a whole.

PLANT MATERIAL: INNOVATION TO RISE TO THE CHALLENGE OF THE ENVIRONMENT AND CLIMATE CHANGE

In the vineyard, resistant varieties and the introduction of new heritage or foreign varieties are the main levers to address the challenge of a sustainable vineyard and climate change, from both economic and environmental perspectives. Encouraging their spread and embracing them in our vineyards remains a key priority for the coming years. To this end, the 'varieties of interest for climate adaptation' (VIFA) programme offers the opportunity to experiment with them, receiving the benefit of IFV expertise, within PDOs for a 10-year period. In parallel, the development of a more diverse offering originating from varietal selection is a way of meeting the demands of the vineyard while guaranteeing plant health. Finally, the vine nursery is mobilised in a developmental approach to produce and disseminate the plant material of the future for the benefit of winegrowers. The recent inaugurations of the pre-multiplication greenhouse in Bordeaux and Qanopée in Champagne offer evidence of the desire to disseminate material produced using cutting edge technology. The sustainable productivity of the vineyard lies at the centre of our concerns.

TESTING THE LEVERS OF ESTATES' RESILIENCE TO CLIMATE CHANGE

This very productivity is at the centre of the projects conducted on adapting to and mitigating the effects of climate change. The nationwide project Vitilience, which draws on a national and regional organisation, involves around 20 partners, among which INRAE and INAO. It aims to test combinations of technical levers (agronomic and oenological) within a network of demonstrators to address the specific problems of each winegrowing region. The demonstrators are thus venues for the experimentation of systems where technical adaptation and mitigation levers are combined, for example:

- Frost or hail protection systems using netting, combined with vineyard grazing and varietal and inter-varietal diversity in western vineyards to cope with extreme climate events.
- So-called 'dry strategy' levers such as regenerative hydrology, the use of biochar, leaf management, the selection of drought-resistant root stock, combined with agroforestry, are being tested in vineyards in the south of France to cope with water shortages.

The demonstrators are also places that are open for dialogue with professionals, public officials, the media, and so on.



This edition is places
under the banned of
solutions that address
today's economic
challenges, but also
lay the foundations
for a more
sustainable sector.

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MOBILISING R&D FOR SUSTAINABLE VINEYARD PROTECTION

Sustainable vineyard protection brings research together around one ambition: to define innovative alternative solutions while maintaining vineyard productivity. The vine-wine PARSADA plan (on the Europe-wide withdrawal of active substances and development of alternative crop protection solutions) was launched in 2023 with this goal in mind, and also caters to the requests conveyed by professionals to support the necessary transition of vine protection techniques while retaining its most effective solutions. Tests of prophylactic methods to reduce mildew and black rot, phytosanitary alternatives, combinations of levers to create the growing methods of the future, and the identification of micro-organisms that provide protection are just some and the R&D themes already being investigated to define innovative grapevine protection solutions.

SUPPORTING THE DEVELOPMENT OF NEW WINE STYLES IN RESPONSE TO EVOLVING CONSUMER EXPECTATIONS

In the winery, innovation can be found in the definition of new vinification techniques in response to new consumer demands. Such is the case for the vinification of no-low products, which constitute a diversification avenue for the sector. Sparkling wines are also being tried and tested to address the growing desire of certain winegrowing regions to tap into fast-expanding bubbly markets. The sensorial approach is an

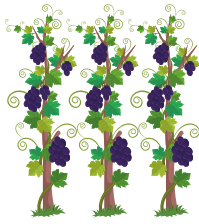
additional factor in this matter, bringing detailed knowledge of consumers' tastes and perceptions, thus defining expectations to guide winery operators in their vinification processes that continue to use less water, energy and additives.

Today, the economic solidity of wine estates relies on innovation. From applied research, in-vineyard testing and networks of winegrowing parcels to supporting the sector's businesses and organisations and pursuing dialogue with local community stakeholders, a range of actions are conducive to the production of references and technical solutions that can help address winegrowing industry issues.

So make a beeline for au SITEVI 2025, where this ambition will be brought to life through a multitude of demonstrations and experience feedback. This edition is places under the banned of solutions that address today's economic challenges, but also lay the foundations for a more sustainable sector.

FIGURES

for the vine-wine sector



783 000 ha

of vineyards in 2023. France accounts for **11%** of global winegrowing surface area



The French winegrowing and winemaking sector is established in

66 departments



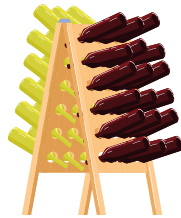
84%

of French wine production bears a quality hallmark: **58%** PDO and **37%** PGI, representing **366** PDO and **76** PGI (figures for 2022)



54,000 farms

have a winegrowing and making activity. **57%** of volumes produced are vinified by individual wineries. The remaining **43%** are vinified by the **1,500** winemaker-dealers and cooperatives

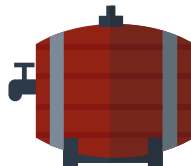


37 millions hl

were produced by France in 2024, accounting for **16%** of global production. The country 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 2024, global wine consumption was estimated at **214.2** million hl, down **3.3%** compared with 2023. Ten countries together consume **68%** of the wine produced in the world. France is in second place, behind the United States, at **23** million hl, just ahead of Italy at **22.3** million hl.



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, **€12.5** billion at production)



One in two consumers

declares an interest in alcohol-free wine, and **22%** of French people drank some at least once in 2024



81 applications

have been submitted for “varieties of interest for climate adaptation” (VIFA) in AOCs since 2019. These varieties are heritage, foreign or disease/climate resistant



2,768 hectares

hectares of disease-resistant varieties planted in France. Floréal tops the list of disease-resistant varieties planted, followed by muscaris and artaban



Olive sector

TRENDS

and outlook for the olive sector

**LAURENT
BÉLORGEY**

President of France Olive



THE FRENCH OLIVE SECTOR: BETWEEN TRADITION, INNOVATION AND ECONOMIC CHALLENGES

While it is relatively modest on a global scale, the French olive sector embodies a rich heritage and unique diversity. With 40,000 olive growers but fewer than 10,000 professionals, 300 mills, more than 70 preservers, and average annual output of 5,000 tonnes of olive oil and 1,300 of table olives, the French industry stands out through its know-how and identity-led products. In 2023/2024, national production hit a record 6,811 tonnes, aided by conducive conditions and a powerful regional momentum, notably in the Sud Provence-Alpes-Côte d'Azur, Occitanie and Auvergne-Rhône-Alpes regions.

AN ORGANISATION IN SUPPORT OF THE SUPPLY CHAIN

France Olive, the French inter-professional trade association for olives, plays a central role in developing and structuring the market vertical. It brings together the stakeholders in the olive oil and table olive sectors and draws on the support of hubs of expertise: agronomics, conservation & research, quality & process, sensorial & physical/chemical analyses, communication & economics. Through this organisation, the needs of professionals can be addressed while promoting all the specific qualities of French olive products.

ECONOMIC AND CLIMATE CHALLENGES

The sector is facing major challenges resulting from inflation and climate hazards. Rising production costs and ever more unpredictable harvests have a direct impact on farm profits. Faced with high prices in the shops, consumers are less inclined to buy French products.

To respond to these issues, the sector must modernise its production, storage and processing techniques. It must continue to invest in research and innovation with digital solutions (such as the Oléiculteur app), and new tech to improve grove productivity and product quality.

PRODUCT PROMOTION AND TRANSPARENCY

Traceability and product origin are also at the heart of the concerns of sector stakeholders. The 100% France logo launched for olive oils and table olives guarantees production that is entirely French from harvest to tin.

EMERGENCE OF A NEW OLIVE GROWING SECTOR IN FRANCE - CHALLENGES AND OPPORTUNITIES

The French olive sector currently positioned on a niche market is standing at the dawn of a revolution.

While French farming must constantly adapt to come with changing consumer expectations, today's winegrowing crisis is creating imbalance in entire regions, particularly in the south of France, and is endangering the existence of many farms. Amid the upheavals underway in wine production and consumption, many professionals are looking to diversify and are developing an interest in olive growing. It is true that on paper, the figures look appealing: French production only accounts for 4% of domestic consumption, and French olive oil sells for around 25 euros per litre. But behind these figures lie several stark realities:

- Very few farms today make a living from olive production alone;
- Production costs are high, and margins are low;
- Imported oils, whose average retail price over the past five years stands at around €8 per litre make up 96% of domestic consumption;
- There is limited potential among consumers prepared to buy olive oil prices at over €12 per litre (as the drop in olive oil consumption over the past two years patently demonstrates).

The role of the trade association is to follow the transformations in progress and prepare the future as best it can so that producers and consumers can both benefit. It is necessary to work together to avert a collapse of the olive oil sector, as has happened in other sectors. **It is in this vein that the Olive Growing Day on Tuesday 25 November will aim to provide clear pointers to ensure that the future of the sector is built on solid, clear and shared foundations, taking into account economic realities, consumer expectations and sustainability issues.**

Today standing at a watershed, the French olive oil sector must reconcile tradition and modernity to rise to economic, climatic and regulatory challenges. Building on the commitment of its stakeholders and the support of France Olive, it must assert its identity and its place on the market, while preserving the wealth of its terroirs and the quality of its products.

ECONOMIC DATA

for the olive sector

Between ancestral know-how and sustainability imperatives, the French olive oil sector continues to cultivate its singularity. Bolstered by a wide variety of cultivars, a distinctive regional identity, and the growing momentum of organic production, it stands out despite its modest share of global production.

THE FRENCH OLIVE INDUSTRY IN A FEW FIGURES...



40,000 olive growers
of which nearly 10,000 professional growers

305 mills

of which 261 privately owned and
44 cooperatives

€100 million

estimated sales of the sector

1,341 tonnes

average table olive output over the past 6 years

5,015 tonnes

average production
of olive oil over the past 6 years

THE GLOBAL OLIVE INDUSTRY IN A FEW FIGURES



3.38 millions

tonnes: global olive oil production in 2024/2025

Spain

is the world's leading producer in 2024/2025,
with 1,289,900 tonnes of olives

+ than 3.1 billion

litres of olive oil, on average were consumed
worldwide in 2024/2025

**Olive oil only
accounts for 1.34%**

of all vegetable oil consumed worldwide

ECONOMIC DATA

for the olive sector

AN OVERVIEW IN FIGURES OF A SECTOR WITH HIGH HERITAGE VALUE

Established in **13 departments of south-east France** and bolstered by a unique diversity of varieties (more than 100 in total, representing **8%** of all the varieties in the world), the French olive growing sector spans **50,000 hectares of groves**, **18,000 of which are cultivated by professional growers**. The industry encompasses around **40,000 olive producers**, among whom around **10,000 provide for 70 to 80% of domestic output**, alongside **30,000 family producers**.

The olive growing sector features a marked commitment to the environment, with **42% of groves** cultivated using organic farming methods, while **33% benefit from an irrigation system**.

Annual oil production amounts to **5,000 tonnes on average** (equating to 5.2 million litres), **30%** of which bearing a PDOI hallmark, which compares with average domestic consumption of **116,000 tonnes** (or 126.6 million litres), of which **80% extra virgin olive oil**. This only accounts for **4% of French consumption**, and **0.16% of global production**.



The olive growing sector features a marked commitment to the environment, with 42% of groves cultivated using organic farming methods, while 33% benefit from an irrigation system.

France is thus the fourth biggest market in Europe and the fifth biggest in the world for olive oil, and remains highly dependent on imports (Spain 65%, Italy 22% and Tunisia 10%).

In terms of table olives, average production amounts to **1,300 tonnes**, of which **42% with PDO certification**, while domestic consumption amounts to **92,000 tonnes**, mainly green olives (64%).

The processing industry is made up of small-scale businesses with **305 mills** (30 of which press more than **50 tonnes** of olives per year) and **76 preserving companies specialising in the processing of table olives**.

While domestic consumption relies extensively on imported goods, the French supply chain defends high-quality, local and high value production. Between appellation recognition, adaptation to climate change and agroecological innovation, olive supply chain stakeholders are mapping out a strand of agriculture marked by resilience and rooted in its local communities but resolutely looking to the future.

*Source: France Olive 2024 annual report



Fresh fruit and vegetable sector

TRENDS

and outlook for the fresh fruit et vegetable sector

FRENCH HOUSEHOLD PURCHASES OF FRUIT & VEGETABLES IN 2024

In 2024, volumes of fruit and vegetables purchased for household consumption continued to decline (-1.5% after -2.9% in 2023), mainly due to lower purchasing frequency. In value terms, the drop is less marked (-0.8%) thanks to a higher average price (+0.8%, after +5.1% in 2023). The market share of organically grown fruit and vegetables remained flat in both volume (6.7%) and value (7.9%) after several years of decline since 2020. The volume of organic purchases fell slightly (-0.7%) but the number of households purchasing them ticked up (+0.6 points to 78% of households). The average purchasing price of organic products rose by 1.7%, leading to a slight increase in household spending (+0.9%).

PURCHASING VARIATIONS BY PRODUCT CATEGORY

1 FRESH FRUIT

The volume of fresh fruit purchased continued to drop (-1.8%) mainly due to lower quantities bought per shopping trip (-1.1%) and a slightly lower purchasing frequency (-0.6%). Stone fruits (apricots peaches and nectarines, plums) experienced the biggest drop, ending up significantly below their five-year average (-9% to -15%). Fruit with seeds and citrus fruit experienced a moderate decline. Conversely, berries (+10%), kiwis (+10%) and bananas (+6.9%) saw the main gains in terms of volume. Citrus fruit saw a decline in quantities purchased (-2.8%) with a significant drop for oranges (-6.8%).

2 VEGETABLES

Quantities of vegetables purchased fell slightly (-1.3%) mainly due to lower purchasing frequency (-1.4%). Several vegetable-fruit saw increases in quantities purchased, among them tomatoes (+1.8%), aubergines (+1.5%), cucumbers (+3.1), and more significantly, pumpkin-squash (+8.4%). Lower prices led to lower spending on melons (-5%) and bell peppers (-5%) and for certain vegetables in the 'root, bulb and tuber' category such as carrots (-3%), onions (-3.8%) and turnips (-2%).

3 RETAIL CHANNELS

In general retail channels, the discount supermarket and online segments increased their market share

the most. The discount segment saw its share rise by 0.4 points to 13.7%, with prices dropping (-2.3%) and purchasing volumes sharply rising (+8.2%). The market share of hypermarkets reverted to its five-year average (31%), partly to the detriment of their performance. The decline in purchasing volumes (-3.7%) and drop in spending (-2.8%) in hypermarkets result mainly from lower purchasing frequency. Supermarkets and convenience stores saw their market share remain relatively flat.

In specialist retail, traditional markets and greengrocers continued to shed market share. Markets dropped by 0.4 points to 8.9%, with a significant drop in purchasing volumes (-8.9%). Greengrocers experienced a 0.9-point decline to 5% due to a severe drop in purchasing volumes. Fresh food supermarkets continued to rise, with an 0.8-point increase in market share to 7.5%, and an increase in purchasing volumes of 10.3%. Alternative specialist retail channels (farm shops, organic shops) increased their market share slightly (+0.4 points to 5.8%).

4 PROFILES OF PURCHASING HOUSEHOLDS

The core of the fruit and vegetable customer population remains senior citizens (in their 60s, 70s and older) whose purchasing volumes are the most stable. They make up 37% of the population but account for 50% of the volume of fruit and vegetables purchased for household consumption. In 2024, it was mainly people in their 50s who bought lower quantities (-4.6%), and also families with children/teenagers/young adults living at home (-2.8%). A slight upturn in purchasing volumes was observed among young people (+1.8%) and families with babies (+2.8%). Fruit and vegetable consumption also varies depending on income, rising as income levels rise. Geographically, households in the south-east of France and the Paris region consume the most, while those in the north of France buy the least.

TREND: THE DIVERSIFICATION OF WINE ESTATES INTO FRUIT FARMING

The diversification of farming activities in wine estates, particularly into arboriculture, is an emerging trend in response to several issues they face today. This strategy aims to increase the farms' resilience to climate and economic challenges, while also catering to new consumer expectations and promoting more sustainable methods.

TRENDS

and outlook for the fresh fruit et vegetable sector

KEY DIVERSIFICATION FACTORS

1 CLIMATE CHANGE ADAPTATION

Considering the increasing frequency and intensity of extreme climate events, fruit farming offers alternatives to winegrowing alone. Certain fruit species such as olive trees, fig trees and almond trees, are well suited to local climate conditions, in particular around the Mediterranean. Diversification helps spread the risks of poor harvest and manage water resources better.

2 INCOME DIVERSIFICATION

Starting up new fruit crops enables winegrowers to diversify their revenue streams, thereby reducing their dependence on grape production alone. This could include selling direct to customers, processing the fruit, or introducing tourists to the orchards.

3 ADDRESSING CONSUMER CONCERNS

Consumers are increasingly sensitive to sustainable farming practices and product origins. Diversification into locally produced fruit, most often organically farmed, addresses this growing demand for high-quality and environmentally friendly products sold direct to the consumer.

Diversification into arboriculture requires technical adaptations and investments. Choosing resistant grape varieties and endemic fruit varieties is also a strategy for reducing operations and environmental costs.

However, this diversification does not come without challenges. It may require skill upgrading, capital investment and work reorganisation. The potential loss of high-value-added wine-growing areas is also a factor to consider. In a nutshell, the diversification of wine growing into arboriculture is a clear trend, driven by the need to adapt to climate change, secure income and promote more eco-friendly agriculture. It embodies a shift in winemaking towards a more integrated and multifunctional approach to farming.



ECONOMIC DATA

for the fresh fruit et vegetable sector

PRODUCTION IN FRANCE



STRUCTURE AND DISTRIBUTION



France is the 4th

biggest fruit and vegetable producer in Europe, behind Spain, Italy and Poland. (Sources : Eurostat)

150

cooperatives (sources: INSEE, CTIFL)

+ than 200

producer organisations (2023)

8 millions

tonnes on average over the period 2021-2023

Overall decline

in volumes (+1.8%) between 2010 and 2023:

- + 2.8% for vegetables
- - 10.7% for fresh fruit

Approximately 200

cooperatives (2022)

5.5 Mt

destined for the fresh F&V market

8%

of farms in France grow fruit and/or vegetables

+ than 44,000

points of sale (hypermarkets, supermarkets, discount chains, click & collect, convenience stores)

(source : FCD/FCA 2019)

27,000

vegetable farms (≥0.5 ha), including 7,600 farms growing vegetables in fields for processing

Occitanie

is the leading region in France for the production of F&V destined for the fresh goods market

12,000

reengrocers (2020)

19,500

fruit farms (≥0.5 ha; excluding cider apples, perry pears and olives)

(source: Ctifl according to Agreste - 2020 agricultural census)

A solid and diversified supply chain positioned among the leaders in Europe thanks to its fruit-vegetable balance.

A dense and structured distribution landscape promoting easy access to F&V all over the country.

Economic data on fresh F&V production/consumption

ECONOMIC DATA



€21.5 billion

ex-VAT at consumption stage

€1.9 billion

ex-VAT for out-of-home catering (source: Insee, CTIFL, 2023)

1.9%

of total French household expenditure

(source: Insee, CTIFL, 2021) (sources: Eurostat)

The sector carries a lot of weight in the French food economy, with a key role both at home and in commercial foodservice.

ORGANIC IN FRANCE



2024

market share remained flat at **6.7%** by volume and **7.9%** by value

Volumes

slightly down (-0.7 %), but a higher number of purchasing households (78 %, +0.6 pt)

Organic F&V expenditure

+0.9 %, supported by rising average prices (+1.7 %)

Following several years of decline, the organic market has levelled off and reunited with a loyal consumer base offering good upside potential.

FOREIGN TRADE



Trade deficit

-€5.4 bn in 2023, of which **-€3.7 bn** for fruit

-3,3 Mt

balance in volume terms

Imports

mainly from Spain (≈50 % of volumes), followed by Morocco, the Netherlands, Belgium and Italy

Exports

mainly towards the EU (Germany, Spain, Belgium, the Netherlands, Italy). Outside the EU: Switzerland and the UK

Despite a structural deficit, France promotes its production on neighbouring markets, which offers evidence of the perceived quality of its offering.

JOBS

350,000

equivalent full time (EFT) jobs on fruit farms on vegetable farms

The sector remains a driver for farming and rural jobs, with brighter prospects owing to diversification and local selling outlets.



Appendices

PRACTICAL INFORMATION

SITEVI 2025

SITEVI 2025 has put together an access guide for the event taking place from 25 to 27 November at Montpellier Exhibition Centre. This guide provides details on the various transport options to get to the show. The guide covers access by air, rail, public transport, road, and free shuttles. It also includes plans of the venue and car parks, with the GPS coordinates of both entrances to help visitors find their bearings. Sustainable mobility solutions are also encouraged: these include carpooling and free travel by tram for holders of a visitor or exhibitor pass.

PARC DES EXPOSITIONS DE MONTPELLIER

Route de la Foire, 34470 Pérols

- **Tuesday 25 to Thursday 27 November 2025**
- **8.30 am - 6.00 pm**

Entrance prices

- **Individual visitor**
Online pre-sale: €21 inc VAT
On the door: €31 inc VAT
- **Student**
Free entry (on presentation of proof of status)

Book your accommodation

BNETWORK, the show's official partner, offers a selection of hotels located near the Exhibition centre or easy to reach with public transport.

Book online at:
www.sitevi.bnetwork.com/fr/

Specific requests can be sent to
client.paris@bnetwork.com
+33 (0)1 58 16 20 10

More informations:

[sitevi.com/
practical infos](http://sitevi.com/practical-infos)

ACCESS TO THE EXHIBITION



Read the full access guide here:



By air
Montpellier Méditerranée airport is only 7 minutes away from the exhibition grounds. Free shuttles are laid on between airport and exhibition.



By rail
From **Montpellier Saint-Roch station**, take **tram line 3**.
From **Montpellier Sud de France station**, **free shuttles** are laid on.



By tram
Line 3 - Direction **Pérols Étang de l'Or**, Parc Expo stop.
Free tram ticket upon presentation of a visitor or exhibitor pass, or an invitation.



By road
Access via **motorway** - junction **Montpellier Est / Fréjorgues**
Free parking nearby and at the exhibition venue.



Or why not carpool? New SITEVI partner!
Carpooling with **SLINGER** ! Get to SITEVI 2025 smoothly and easily by sharing your journey with other participants. A convenient, cheap and responsible solution, perfect for reducing your carbon footprint.

Further information can be found in a few clicks in our guide dedicated to improving the SITEVI experience.

GUIDE TO SITEVI

FOLLOW US     

SITEVI 2025

partners

In partnership with:



NOTES

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