



CBI
Ministry of Foreign Affairs

Import intelligence study

Wine in Bolivia

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1. Country data

Figure 1: Map of the country



- Country: Plurinational State of Bolivia (Estado Plurinacional de Bolivia)
- Capital: La Paz (Political Capital); Sucre (Constitutional Capital)
- Official Languages: Spanish (main language); followed by Aymara, Quechua and 34 other languages
- Government: Presidential Constitutional Republic (continued democratic governments since 1982)
- Business Hours: Monday to Friday 8:00 – 12:00am and 2:30 – 6:30pm
- Currency: Bolivianos (Bs)
- Exchange rate: Bs.6.96/US\$ (constant last 2 years)
Bs.9.21/Euro (average of last 3 months)
- Time zone: UTC-4 (English)
GMT-4 (Spanish)
- Population (2012): 10.5 Million people

- Surface of the country: 1.10 Million square kilometers
- Location of Bolivia: In the centre of South America, sharing extensive borders with Brazil, Paraguay, Argentina, Chile and Peru
- Religion: Mainly catholic with a minority of evangelicals
- Climate: great variation, depending on the region
- GDP (2013) 30.789 Million US\$
- GDP/capita (2013) 2,794 US\$/capita
- Growth GDP (2013) 6.8%
- Inflation (2013) 5.7%
- Unemployment (2013) 3.2%
- Export (2013) 12.163 Million US\$
- Export Growth 6.5%
- Imports (2013) 9.282 Million US\$
- Direct Foreign Invest. 1.060 Million US\$
- International Reserves 14.430 Million US\$
- Foreign Debt 5.265 Million US\$

Organisations of which Bolivia is a member

Bolivia is a member of the United Nations Organisation (UN), World Trade Organisation (WTO), G77, Organisation of American States (OAS), Andean Community (CAN), Latin American Integration Association (ALADI), Grupo Rio, MERCOSUR (associate member), International Development Bank (IDB), International Monetary Fund (IMF) and Union of South American Nations (UNASUR).

Trade Agreements signed by Bolivia

Multilateral Agreements:

World Trade Organisation (WTO)	12 Sept. 1995
Andean Community (CAN)	26 May 1969

Free trade Agreements:

Mexico (ACE 66)	17 May 2010
MERCOSUR (ACE 36)	17 Nov. 1996
Chile (AAP.CE. No.22)	06 Apr. 1993 (partial preferential Agreement)

2. Bolivian wine sector

Characteristics

The following unique features characterise the Bolivian wine sector:

USPs (unique selling propositions) of the Bolivian Wine

- 99% of all Bolivian vineyards are situated at an altitude between 1,600 and 3,000 metres above sea level (masl). There is no other wine production country in the world with these characteristics.
- Existence of ancestral vineyards with vines of more than 200 years grown around so-called 'molle' trees.
- Elegant style, medium quality wines, produced in small volumes in an exotic, yet undiscovered viticultural country.

Highest vineyard surface in the world

Many vinologists are pleasantly surprised to find that all of Bolivia's vineyards are situated at altitudes ranging from 1,600 to around 3,000 masl, or 5,000 to 10,000 feet asl (above sea level). Bolivia may very well be the country with the highest vineyard surface in the world. By 1993, after discovering the subtle differences in its wine quality due to these unusual altitudes, the Bolivian wine sector developed the concept of "High Altitude Wines", an attribute that positions Bolivian wine as a unique product in the world.

Authenticity: unique ancestral vineyards

Bolivian winemakers, almost uncannily, have maintained their gorgeous ancestral vineyards. In every wine region of Bolivia – such as Los Cintis and other valleys – ancestral viticultural traditions remain alive and well. Vines of up to 300 years old are still in production, mainly around molle trees (*Schinus molle*) as well as "chañar" trees (*Geoffroea decorticans*). This is in keeping with the old colonial training system: every year the molle trees are severely pruned to improve sunlight penetration for the vine, which grows around the trunk and branches of the tree creating a stunning picture of Bolivia's viticultural history.

Styles of wine made in Bolivia

- 77% Red wines (entry, varietals, reserves, premiums and icon wines)
- 20% White wines (entry, varietals, reserves, premiums and semi-sweet Muscat wines)
- 3% Rosé, desert, sparkling and fortified wines

Minimum percentages for vintage and varietal bottling

Not formally regulated. Wineries are respecting 90% for vintage, 85% for varietal bottling and 100% for specific regions. Due to the spread of the country, wines are bottled 100% locally and transported only when bottled.

As for the rest of South America, vintage differences are very small, always achieving fruit maturity. Differences that do occur are usually the result of varying precipitation levels and, in some years, the effects of local hailstorms.

CSR and environmental and occupational regulations

The Bolivian Institute of External Commerce (IBCE) is one of the entities involved in promoting CSR (Corporate Social Responsibility; RSE in Spanish). All wineries have taken CSR initiatives, both voluntarily and in alignment with governmental regulations.

In addition to the voluntary establishment in each winery of high standards of quality wine and singani production as well as sustainable practices, the sector is subject to environmental and occupational regulations.

According to the Environmental Law and its regulations (RASIM), each winery is registered with an Environmental Manifesto and an Environment Management Plan. The registration is to certify that all processes related to the production of wine and singani are executed by means of technical procedures that do not harm the environment or the population in the areas surrounding the facilities. It also certifies that implementation is based on an approved plan and monitored continuously by the environmental government authorities.

The implementation of the General Law of Hygiene, Occupational Security and Welfare (DL 16998 of 1979) is closely supervised by the Bolivian Ministry of Work in all the established wineries. Among other matters, it ensures the provision of a safe place to work and fair treatment for each worker. Within each winery, a mixed committee composed of executives and workers is responsible for the fulfilment of the annual investment and activity programmes.

Some of the vineyards are organic, but most tend to follow sustainable cultivation programmes aiming to decrease tillage and maintain soil fertility and organic matter by natural means. As Bolivians usually say, "We have been growing grapevines for more than 400 years and we want to stay around for at least another 400 years."

Quality and standards

SENASAG (Servicio Nacional de Seguridad Alimentaria e Inocuidad Alimentaria) is responsible for quality control. This institute certifies the wineries as well as the products for national and international markets. Its work is supported by a number of laboratories, such as the one at Juan Misael Saracho University in Tarija and the CENAVIT (National Viticulture and Enology Center). The most important wine analyses are described in 17 norms regulated by the Bolivian Institute of Normalisation and Quality (IBNORCA). Norms for wine controls and analyses do not contradict IOV regulations.

Most of the wineries are in the process of implementing capacitation programmes to obtain certification in either HACCP or GMP.

Tariffs and quotas

Bolivia has assigned a general tariff (GAT) of 10% for the import of wines and spirits as well as the payment of other local taxes to which local products as well as imports are subject. The government has never assigned any quotas for the trade of wines and distillates.

Sector laws and regulations

The wine sector is regulated by a specific Supreme State Decree revised in 1999 as well as numerous norms for the production, bottling and commercialisation of wine and singani. In addition to the above decree and norms, the Supreme Law 1334 of 1992 established the Denomination of Origin for singani.

Supreme decree No 6521

Alcoholic products must be bottled within the region of production. Transportation and commercialisation of alcoholic products in bulk is not authorised and is subject to sanctions.

Supreme Decree No 24777

The decree regulates and promotes the viticulture and enology development.

Law No 3053 (year 2005)

This law declares the necessity to implement a system for mitigating hail damage.

Supreme Decree No 25569

Declares the establishment of the CENAVIT (National Viticulture and Enology Center) with the responsibility to promote the development of the sector as well as improving the production quality, marketing, transportation and competitiveness of Bolivian wines.

Law No 1334 (year 1992)

Recognises the Denomination of Origin for the singani in the Central Valley of Tarija, in the Valleys of Cinti and in other regions of La Paz and Potosí.

Law No 3048

Declares the city of Tarija as "National Capital of Grapes and Wine".

Law 3685

Declares the development of artisanal wines in the provinces of Avilés and Méndez (Tarija) as "Cultural Patrimony".

Law 529

Controls the consumption and commercialisation of alcoholic beverages. Describes control measures for producers, traders and consumers as well as publicity.

Supplies

Most supplies for the development of wine are produced within Bolivia. Almost all of bottles are bought from the main factory in Bolivia, owned by multinational corporation Vitro. Most labels and all packaging materials are also bought locally. The main supplies that are imported are corks (from Portugal, Argentina and Chile) and enological products.

Research and development

High Altitude Wine Research

The unique altitude and conditions in which Bolivian viticulture exists and its potential for producing quality wines has taken the global wine experts by surprise. High quality wines from Tarija have won numerous international wine contests and are now being studied to determine with scientific precision the intricate characteristics and beneficial effects of altitude and the accompanying factors in the production of premium wine. In one study of high altitude wines, AJMS University of Tarija found higher concentrations of resveratrol in red wines from Bolivia compared with wines from lower vineyards in other countries. A new study is now being conducted in alliance with the INV from Argentina to identify further characteristics of the vines producing high altitude wines from Bolivia and Cafayate (Argentina).

National Viticulture and Enology Center - CENAVIT

CENAVIT is the national research and extension centre for viticulture and enology. It is located in the town of Uriondo in the Central Valley of Tarija. Since its foundation in 1972, it has served the sector by providing laboratory services and vegetative grapevine material, extension work in viticulture as well as enology, and practical research for the sector. In addition to its laboratories, the CENAVIT has 10 ha of vineyards and a small experimental winery.

Centro de Investigación San Roque

The 'Centro de Investigación San Roque', founded in 1955, is the viticultural institution responsible for investigation and extension work in regions such as Camargo, Villa Abecia and Carreras, all within the Valley of the Cintis.

Signature grape varietal of Bolivia

'Wines of Altitude' sums up Bolivian vineyards and wine. Bolivians prefer to think more of a signature characteristic of the Bolivian wine than of a signature variety.

There is no specific signature varietal of Bolivia. There are a number of old varieties from colonial times still growing around molle trees, but these have yet to be tested. The acreage is dominated by Moscatel of Alexandria, which, if it would have been used for still wines, would have been the signature variety for Bolivia. However, this variety is predominantly used for singani and, to a lesser extent, for semi-sweet white (sparkling) wine.

3. Bolivian wine regions

There are numerous valleys in which wine has been traditionally produced in Bolivia for more than 400 years. The most important regions today comprehend 3,000 hectares and are divided into:

- The Central Valley of Tarija with 2,400 hectares of vineyards between 1,600 to 2,150 masl
- The Valley of Los Cintis with 300 hectares between 2,220 and 2,414 masl
- The Valleys of Santa Cruz with 100 hectares between 1,600 and 2030 masl
- Various valleys in Potosí, La Paz and Cochabamba with around 200 hectares between 1,600 and around 3,000 masl

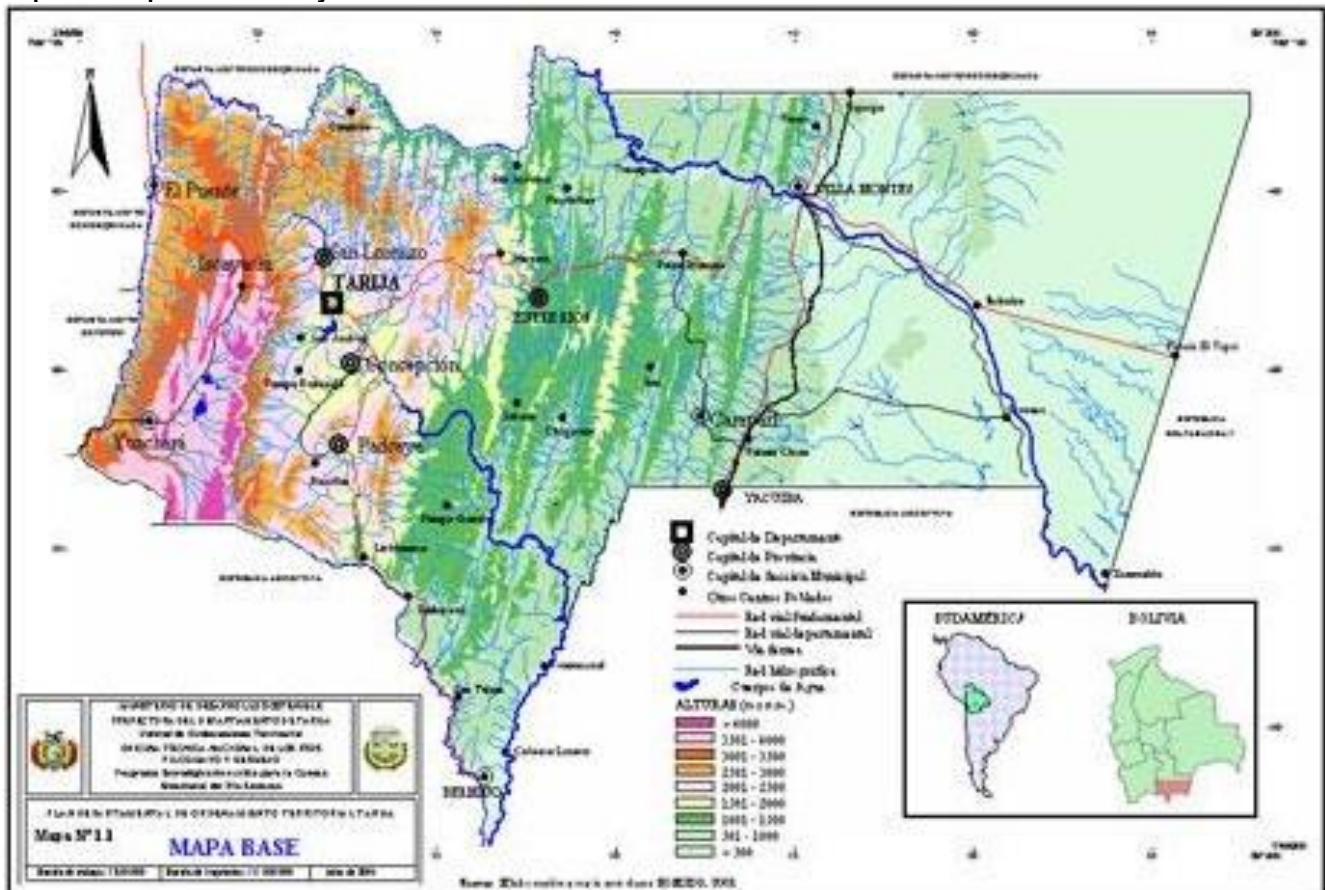
Even though the vineyards in Bolivia are located south of the Equator at latitudes between 17.00° and 21.53° and above the typical viticultural belt of the southern hemisphere, the climate is temperate and semiarid due to the high altitude of the valleys. Coming down from the 'Cordillera de los Andes' and 'Cordillera Real' mountain ranges with peaks above 6,500 masl (21,300 feet asl) to the low lands of the Amazons, Bolivia has numerous small valleys in which grapevines have been growing for centuries.

The Central Valley of Tarija

The main varieties planted in the central Valley of Tarija are Cabernet Sauvignon, Syrah, Merlot, Malbec, Tannat, Garnacha and Barbera in reds and Moscatel of Alexandria, Sauvignon Blanc, Riesling, Franc Colombard and Chenin Blanc in whites. As much as 93% of the country's total grape production is produced in the Central Valley of Tarija. As a result, 5.7 million litres of wine, or 97% of all Bolivian wine, is produced in Tarija by about 25 wineries; six of these account for the largest share, with four wineries producing 4 million litres of singani.

The Central Valley of Tarija is located in the region of Tarija in southern Bolivia on the border with Argentina between the latitudes 21.20° and 21.58° south. Most of the Tarija vineyards are concentrated in the provinces of Aviles and Cercado, with small vineyards in the provinces of Arce and Mendez. Irrigation water comes from the rivers Camacho, Guadalquivir and Santa Ana as well as from the San Jacinto dam that is fed by the Tolomosa River. Further downstream, all of these rivers merge into the Tarija River, which is part of the basin of La Plata.

Map of the Department of Tarija

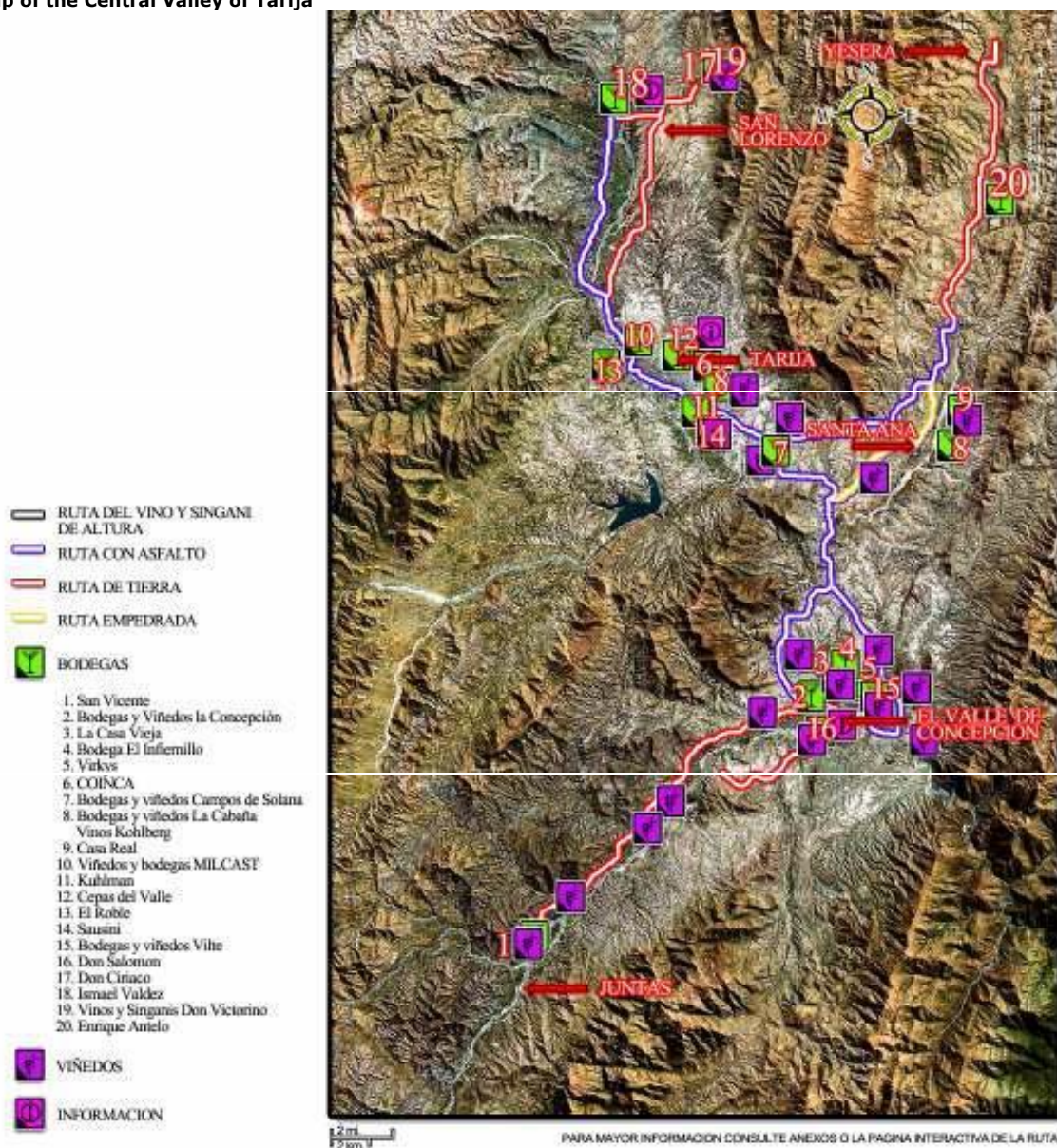


The most widely planted variety in Tarija and Bolivia is Muscat of Alexandria, which is used for wine and Singani production. The most important varieties planted for quality wine production are Cabernet Sauvignon, Syrah, Malbec, Merlot, Tannat and Barbera for reds and Sauvignon Blanc, Semillon, Chardonnay, Riesling Ugni Blanc and Torrontes for whites. Although ancestral vines growing around molle trees still exist in Tarija, most of the vineyards are planted in vertical trellises with a density of 2,500 to 3,500 plants per hectare and with a bilateral Guyot or cordon pruning systems. 100% of the vineyards of Bolivia are harvested by hand. Due to the presence of phylloxera, most vineyards for wine production are grafted on resistant rootstocks.

The Central Valley of Tarija

Wine Brand	Vol. (L)	Vines Has	Region	Variety	Altitude (m)
Kohlberg	2,800,000	115	Santa Ana	Malbec, Syrah, Cabernet Sauvignon, Garnacha, Merlot, Semillon, Ugni Blanc, Moscatel, Macabeo, Parrellada	1,800 to 1,900
Aranjuez	2,500,000	200	Tarija	Tannat, Cabernet Sauvignon, Merlot, Malbec, Moscatel	1,800 to 2,000
Campos de Solana	1,200,000	80	El Portillo	Cabernet Sauvignon, Malbec, Merlot, Riesling	1,850
La Concepción	300,000	45	Concepción	Cabernet Sauvignon, Syrah, Merlot, Sauvignon Blanc, Chardonnay, Riesling	1,750 to 2,100
Casa Grande	60,000	2	El Portillo	Cabernet Sauvignon, Malbec, Syrah, Chardonnay	1,800
Sausini	30,000	7	San Luis	Cabernet Sauvignon, Merlot	1,750 to 1,850
Magnus	15,000	10	Portillo	Cabernet Sauvignon, Syrah, Merlot	1,900
Los Parrales	20,000	40	Santa Ana	Moscatel, Chardonnay, ...	1,855
Cepas del Valle	60,000	2	Tarija	Moscatel, Negra Criolla	1,750
El Potro	8,000	0	Tarija	Syrah, Cabernet Sauvignon, Moscatel Alejandria	

Map of the Central Valley of Tarija



Altitude of Tarija

The altitude of the Tarija vineyards varies from 1,600 to above 2,100 masl.

Regions	Altitude (Metres asl)	Altitude (Feet asl)
Sella	2,150	7,049
Chaguaya	2,100	6,885
San Luis	1,900	6,230
Portillo	1,850	6,065
Santa Ana	1,800	5,902
Concepción	1,750	5,738
Calamuchita	1,700	5,574
Angostura	1,600	5,246

According to the classification of Köppen, Tarija is a fresh, semiarid region with multiple mesoclimatic variations. Rain falls primarily in the summer months, with an annual precipitation of 550mm. The monthly mean temperatures vary from 13.1°C in July to 20.7°C in December-January. The maximum mean temperatures vary from 23.8°C in July to 27.5°C in October-November, while the minimum mean temperatures vary from 2.3°C in July to 14.4°C in January. Winters are mild, except during very cold periods, when temperatures can drop to -5°C or lower. The thermal amplitude varies from a minimum of 12.7°C to a maximum of 21.5°C. The maximum mean temperature during bud burst is 25.7°C with a minimum of 7.8°C. During harvesting, the maximum mean temperature is 25.8°C with minimum of 12.9°C. During the growing season, afternoons in the Central Valley of Tarija are characterised by a typical cold, eastern wind. The last spring frosts continue until mid-September and the early fall frosts begin in May. Damage caused by hailstorms can affect an average of 8 to 10% of production. The soils in this region are of alluvial origin from the quaternary period and vary greatly in structure and depth.

As many as 63 colonial and republican wineries as well as brands have been said to exist in the Valley of Cinti. Some of these are no longer producing, but their infrastructure and vineyard sceneries have been kept in various stages of preservation.

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60 years ago, a surface of 1,500 ha with a strong inclination was planted for singani production. Singani production was then shifted to the Central Valley of Tarija, because of this region's lower production costs. As a result, only 300 of the original 1,500 hectares remain planted today. However, there is an increasing interest in the production of quality wines using the old colonial varieties as well as international French varieties. Presently, 20 wineries produce about 100,000 litres of wine and 200,000 litres of singani for local consumption.

In colonial times, varieties such as Moscatel, Torrontes and Albilla in whites and Negra Corriente, Negra Criolla or simply 'uva negra' were grown. Today, the varieties found in the Valley of Cinti are Negra Criolla, Vicchoqueña, Misionera, Tintorera, Syrah and Cabernet Sauvignon in reds and Moscatel of Alexandria, Cereza and Albilla, in whites.

The Valley of Cinti

Wine Brand	Vol. (L)	VinesHas	Region	Variety	Altitude (m)
Tierra Roja	4,000	3	Villa Abecia	Cabernet Sauvignon, Moscatel de Alejandria	2309
Ocho Estrellas	12,000	2	Camargo	Misionera, Viscchoqueña, Cabernet Sauvignon, Moscatel de Alejandria	2310
La Casona de Molina	15,000	2	Camargo	Misionera, Viscchoqueña, Cabernet Sauvignon, Moscatel de Alejandria	2350
Other brands	70,000				

Apart from the altitude, the viticulture of the Cinti and other regions of Bolivia has another particular characteristic. Most of these vineyards are still planted with centennial vines of varieties imported by the Spaniards, such as Moscatel of Alexandria, Misionera (also called Negra Criolla) and Vicchoqueña. The vines grow around molle trees, which, together with the beautiful landscapes and viticultural history of these regions, have awakened the interest of both international and local experts in proposing Cinti for the title of 'Live Viticultural Landscape Museum' to the UNESCO.

Geographically, the valleys of Cinti are located around the middle of the national road which runs from Tarija to Potosi. The potential for grapevine cultivation is estimated at more than 3,000 hectares. Because of the valleys' pleasant climate and their nearness to Potosi, many miners from Potosi historically settled in the region, building attractive haciendas and investing in wine and singani wineries.

Altitude and climate of the Cinti valleys

Currently, all vineyards in the Cinti region are planted at altitudes between 2,350 and 2,800 masl and situated in a north-south canyon surrounded by beautiful red mountains with narrow alluvial valleys. These valleys have a pleasant, temperate and dry climate, with cool to very cool nights during the harvest period.

Regions	Altitude (Meters asl)	Altitude (Feet asl)
Camargo	2,414	7,915
Villa Abecia	2,324	7,620
Carreras	2,220	7,279

As for Tarija, the climate of the Cinti viticultural regions is determined not so much by their latitude as by their altitude, topography, slope and the exposure of their hills. According to the climatic classifications of Köppen, the Cinti region has a dry, semiarid climate. Precipitation is concentrated in the summer months with annual averages of 255mm in Villa Abecia and 363mm in Camargo. During bud burst, the maximum mean temperature is 28.0°C and the lowest is 8.5°C. During harvest, the maximum mean temperature is 28.5°C and the lowest 12.0°C. Late frosts occur until August and occasionally in September. Winters are mild with occasional temperature drops to -5°C. Depending on the year and the region, some production may be affected by hail.

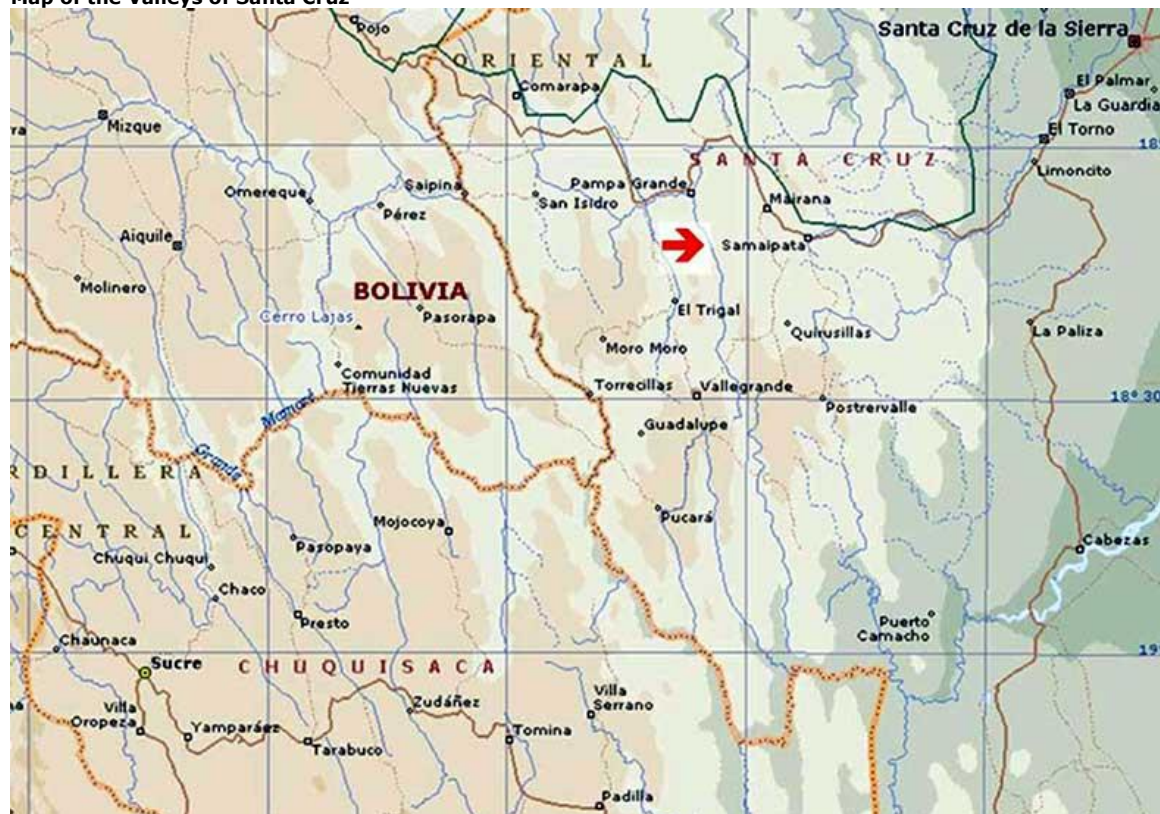
The Valleys of Santa Cruz

The Valleys of Santa Cruz currently have only a few small wineries dedicated to the production of wine and singani for local consumption. The only exception is Uvairenda, a small winery with a clear ambition to produce quality wines. Among the varieties planted in the region are very small amounts of Syrah, Tannat, Cabernet Sauvignon and Malbec, as well as Torrontes, Sauvignon Blanc, Riesling and Moscatel de Alejandria.

The Valleys of Santa Cruz are located immediately to the Southwest of the Codo de los Andes between 18° and 19° latitude south and consists of small vineyards surrounded by mountainous conditions. Currently, the planted surface

approaches 100 ha, but the valleys offer potential for planting as much as 6,000 ha, especially in the Valle Grande. Various research plots were planted to evaluate the adaptation of several varieties to the soils and climate of the region. Due to this region's proximity to Santa Cruz - the largest and fastest growing city of Bolivia - substantial investments are expected to be made in new vineyards and the construction of modern wineries in the time ahead.

Map of the Valleys of Santa Cruz



According to Köppen, the climate in this region is moderate with dry winters. The mean average temperatures in the various valleys of Santa Cruz (Valle Grande and Samaipata) are 18.0 and 18.5°C, respectively, with average annual rainfall of 500 and 650 mm. Most of the rain falls in the late spring and early summer, with occasional spring hail.

Regions	Altitude (Metres asl)	Altitude (Feet asl)
Valle Grande	2,030	6,655
Comarapa	1,825	5,988
Samaipata	1,750	5,738
Mairana	1,600	5,246

4. Trade

In 2012, Bolivia imported 4.5 million US\$ in wines from mainly Argentina (52%), Chile (30%), France (10%) and various other wine producing countries (8%).



Export markets

Four wineries are responsible for wine exports from Bolivia. However, their efforts have been unstable and individualistic. In spite of the sector's development and modernisation, exporters have not followed a common export marketing plan. What exports there are, have resulted from importer interest rather than from an aggressive or coherent presentation of Bolivian wines to the world. So far, almost 100% of Bolivian wine exports have been bottled still wines, with very few exceptions of sparkling wine exports and zero exports in bulk. In 2013, 15 wineries formed a new association, 'Wines of Bolivia', pledging to work together at exporting Bolivian wines of altitude and towards creating a favourable image for the Bolivian wine sector.

Bolivian wine exports by country of destiny (in US\$)

Country	2009	2010	2011	2012	2013	2014p
Bahamas	0	0	305	254	1,288	1,323
Bulgaria	41,600	0	0	0	0	0
Czech Republic	14,956	3,218	0	0	0	0
China	15,884	16,006	0	39,650	44,024	0
Mexico	0	0	9,762	0	0	0
Peru	0	0	1,690	0	0	0
Switzerland	6,532	6,137	5,325	0	0	0
USA	5	0	0	0	35,237	0
Other	816	295	51	138	569	0

TOTAL (US\$)		79,794	25,655	17,134	40,042	81,118	1,323
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Note: 2014p is partial

Ref.: INE and IBCE

Bolivian wine exports by country of destiny (in Liters)

Country	2009	2010	2011	2012	2013	2014p
Bahamas	0	0	172	117	545	82
Bulgaria	9,231	0	0	0	0	0
Czech Republic	6,667	617	0	0	0	0
China	12,701	12,701	0	11,842	13,119	0
Mexico	0	0	725	0	0	0
Peru	0	0	674	0	0	0
Switzerland	1,022	1,028	1,028	0	0	0
USA	2	0	0	0	13,405	0
Other	342	158	51	145	160	0
TOTAL (Kg)	29,964	14,503	2,650	12,104	27,229	82

Note: 2014p is partial

Ref.: INE and IBCE

Regional Comparison Producing Nations

Compared to the neighbouring countries, Bolivia is a very small wine producer and exporter. Bolivia targets specialized niches (elegant, high altitude wines) with small volumes at higher prices.

One of the neighbouring countries, Chile, is a very successful wine exporting country. Chile has fewer hectares of vineyards than Argentina, but exports twice as much to most of the wine consuming countries of the world. Its main export destinations, in order of importance, are: the USA, UK, Japan, Spain, Germany, Netherlands, Brazil, Canada, Denmark and many others. The average export price is 3.22US\$/litre FOB.

Another neighbour, Argentina, is the 5th largest producer of wine in the world. This country has recently shifted its strategy towards bottled wine exports after too many years of concentrating on the local market and bulk exports. Led by its flagship variety Malbec, Argentina has aggressively entered the world market, mainly with bottled red wines. The country has exported most successfully to the USA. Argentina is a country with a long tradition of wine exports to the USA, Canada, Brazil, UK, Netherlands, Paraguay, Japan, China, Sweden and other countries. Its average price is 2.74US\$/litre FOB.

Wine exporting countries from South America - 2012

Country	Area planted (x 1,000 Has)	Production Wine (mill. L)	Consumption L/capita	Wine Exports (mill. L)	Wine Exports (mill. US\$)
Chile	126,000	1,255	17	754	1,808
Argentina	217,750	1,300	26	360	920
Brazil	81.9	353	1.8	6.2	6.8
Uruguay	8.2	98.4	33	13.4	10.6
Peru	7.5	33.3	1.4	0.23	1.00
Bolivia	3.0	5.9	1.8	0.01	0.04

Brazilian wine production has grown vigorously over the last years, as have its wine exports. Still, most of the wine produced in Brazil goes to the domestic market. The country also imports wine (about 50% of domestically consumed wine is imported). Export destinations include Russia, USA, China, Netherlands, Colombia, Paraguay and the UK.

Uruguay is an interesting country to follow since it has a small surface planted, has good quality wines and tends to aim for special, high-price niches in the European Union. It mainly exports typical Uruguayan Tannat wines to Brazil, the USA, Russia and many other countries.

Peru is a newcomer on the international wine market with exports mostly to Russia, the USA, Japan and other countries.

Main competitors

Bolivia will have to compete with all of the new world countries that produce wine. The wine sector in these countries is considerably more developed than Bolivia's and they also have far broader export experience. It will be extremely difficult for Bolivia to compete on price at entry level. However, Bolivia has interesting opportunities if it invests in, and concentrates on, small niche targets interested in new and rare wines at medium to high prices. Other countries target these markets as well, but Bolivia's small volumes mean it can see these other countries as partners and market openers for new world wines rather than as direct rivals.

5. Doing business in Bolivia

Business culture and ethics

Cultural differences with Europe, the USA and even Asia are the same for Bolivia as they are for other Latin American countries. For instance, Bolivians have a different concept of time, which can be difficult to deal with for Europeans. Also, the information they offer may be less precise than Europeans would expect. Of course, most wineries today have executives specialised in trading abroad with a good some understanding of the European concept of time.

After Spanish, the most common business language in Bolivia is English. Most winery executives are fluent in English and can communicate on all wine-related matters in a clear and understandable manner.

Bolivians are kind, gentle people, with concern for each other's welfare. Friendship is a very important value. The family is the central unit in the social system. Education is valued, but beyond reach for many Bolivians.

Dos and don'ts

Foreigners accessing Bolivia do well to try and gain respect for, and understanding of, cultural differences. One way to do this is to read about Bolivia before you come. Here are a few tips for softening the culture shock and helping you cope with some common social situations:

- Greeting is an important part of Bolivian culture. You should always acknowledge all the people in a room when you enter or leave it. You can do this by looking at each person and saying "*buenos días/tardes/noches*", shaking hands, or by a simple kiss on the right cheek.
- It is considered rude to stretch, yawn or burp in front of someone.
- Although punctuality is not a high priority in Bolivia, visitors should be punctual for business meetings. However, note that meetings rarely start on time.
- Take the time to get to know your Bolivian customers and colleagues. Personal relationships are vital to corporate success.
- Deadlines are not considered important.
- More than one meeting may be necessary to negotiate and close a deal. Plan on making several trips to complete a business transaction, since face-to-face communication is preferred over phone calls, faxes and e-mail.
- The pace of business negotiations is generally much slower than in Europe or the United States. Never attempt to rush a deal. Applying pressure may cause a deal to fail. Remain low key.
- A contract is not finished until an agreement is reached on all parts. Each part is subject to re-negotiation until the entire contract is signed.
- If there is a mat or rag in a doorway, take the hint and use it to clean your feet.
- If someone is eating and leaves the table you should say "*provecho*" – "*permiso*" and if it is said to you, respond with "*gracias*". The same "*permiso*" should be used when you enter or leave a group or meeting.
- Bolivians in general, are quiet people - so be aware of the volume of your voice, especially when in groups of foreigners.
- Drinking is a part of almost all fiestas, weddings, baptisms and even Todos Santos and Bolivians may often insist that you join in. If you don't feel up to having a few drinks, it may be best not to attend the event in question. It may work to say you are "*mal de estomago*" (sick), but the social pressure will still be there.
- Never touch food or eat anything with your fingers. Even fruit is eaten with a fruit knife and fork.
- It is polite to eat everything on your plate. Complements on food will be viewed as a request for more food. Don't express your appreciation until the dinner is over, if you don't want more.
- Dress for men: In La Paz, a dark, two-piece suit is best. A lightweight suit is more common in Santa Cruz. Follow your Bolivian colleague's lead with regard to wearing ties and removing jackets in the summer.
- Dress for women: suits, dresses, skirts and blouses.
- Do not wear shorts in cities.

Bolivia's business image

Bolivia is a landlocked country, as it lost a large section of coastal territory to both Peru and Chile over 100 years ago. Since then, it has no ports of its own. Politically, the country has known several models, including forms of democracy, capitalism, fascism, dictatorships, and socialism. These changes, unfortunately, have caused severe economic fluctuations and the country is often considered by foreign investors to be unstable and risky.

Culturally, the country is very diverse and there is great economic disparity between different social groups. Discontent among a large part of the country's poor population has led to social unrest, road blocks, manifestations, strikes and other forms of protest. These issues often impair business continuity.

There is another side to Bolivia, however. Despite the difficulties it faces, Bolivia was named the world's most entrepreneurial country in 2008 and has ranked near the top in entrepreneurship often since then. One simple explanation for this is that many of the country's industries are new and relatively underdeveloped, so investments tend to be highly profitable.

An important point to note is that western and eastern Bolivia differ like night and day, both geographically and socially. The western, mountainous half of the country has less industry and agriculture and the focus here is on government jobs and services, textiles, small-scale agriculture, mining, tourism and services. The eastern part of the country is largely lush and tropical and geographically extensive. Large-scale agriculture, cattle ranching, industry and exports are found here. Santa Cruz, Bolivia's largest state, is the country's financial, industrial and agricultural capital. Its people are very protective of the city's wealth of natural resources and have loudly voiced their concern over any national government intervention that might adversely affect their ability to participate successfully in global trade. Eastern Bolivians are eager to ensure that Bolivia's government provides the necessary environment for secure foreign investment; this is why this department has been most vocal in its demand for financial autonomy. The regions of Tarija and Cinti are nestled in between western and eastern Bolivia: they have an eastern mentality but with less development.

6. Bolivian wineries

Wineries in the Central Valley of Tarija

- **Aranjuez**

Winery Name:	VINOS ARANJUEZ – MILCAST CORP.
Web page:	www.vinosaranjuez.com
Contact address:	
Telephone:	(591)(4) 6642552
Winery address:	Av. Ángel Baldivieso N° 1976
Mail:	info@vinosaranjuez.com
Winemaker:	Franco Sanchez

Winery description:

We are one of the most renowned wineries in Bolivia with a significant presence in the domestic market. Our quality is recognised by consumers and has won us several medals in various competitions, obtaining the first GREAT GOLD MEDAL of Bolivia in a competition endorsed by the OIV and the EIU.

Facts and Numbers:

Age of the winery:	Founded in 1976
Annual production:	2.800.000 litres
Varieties produced:	Tannat, Merlot, Cabernet Sauvignon, Petit Verdot, Muscat de Alexandria, Chardonnay, Sauvignon Blanc
Vineyard height:	2.000 metres of altitude
Gold Medals:	Juan Cruz 2012, Great Golden Medal, "Tannat al mundo 2013", Uruguay



Tannat 2012, Golden Medal, "Tannat al mundo 2013", Uruguay



Cabernet Sauvignon 2012, Golden Medal, "International Wine Competition 2013", Brazil



Dúo Tinto 2012, Golden Medal, "Vinandino 2013", Argentina



Terruño Tinto 2013, Silver Medal, "Vinandino 2013", Argentina



Terruño Blanco 2013, Silver Medal, "Vinandino 2013", Argentina



Wines for export:

Terruño Tinto (Blend of Red grapes – table fine wine)

Young Red Wine of the year, with a ruby-red colour with violet hues. With abundant red fruit aroma and delicate notes of vanilla and spice due to its passage by American oak. The palate is nice and round, with moderate tannins and a mouth end reminiscent of cherry and plum.

Terruño Blanco (Blend of White grapes – table fine wine)

Young White wine of the year made from Muscat of Alexandria; it has a pale golden colour with flashes of green. This noble white is characterised by light floral aroma varieties. The palate is very citrusy and fresh with good acidity and a memorable end.

Dúo Tinto (Tannat 50% + Merlot 50%)

Intense ruby -red colour. This bivarietal harmoniously combines the power and structure of Tannat, with the finesse and elegance of Merlot, obtaining a perfect balance, while the oak adds character without gaining prominence over the fruit.

Dúo Blanco (Sauvignon Blanc 50% + Chardonnay 50%)

Pale green characteristic of Sauvignon Blanc, conjugated with gold tones from Chardonnay. This elegant white has citrus and tropical aromas such as grapefruit, peach, pineapple and passion fruit. In the mouth, it denotes a significant acidity, but it is also smooth and full-bodied, making it round and refreshing.

Tannat

Intense red colour, marked with black and purple tones, this stunning Tannat has aromas of blackberry, blueberry and raspberry, amalgamated with delicate notes of oak. It is a generous wine that has firm tannins and good acidity, making it balanced with a long and pleasant finish.

Cabernet Sauvignon

Ruby-red colour of great intensity. Presents pronounced notes of black pepper and fresh peppers, combined with aromas of ripe red fruits. Its oak aging gives silky tannins and hints of vanilla and cocoa, which make it succulent in the mouth, elegant and with a long persistence.

Juan Cruz

This fabulous Tannat has an intense red violet colour with deep black tones. It has aromas of blackberries, figs and dates, which also combine with notes of snuff, vanilla and cinnamon, that come from its 12 months in oak barrels. In the mouth, it feels powerful but with fine tannins, with an explosion of flavours that make this wine a real pleasure for the senses.

Tours y degustaciones: Not Available

- **Campos de solana**

Winery Name: VIÑEDOS Y BODEGAS CAMPOS DE SOLANA LTDA
 Web Page: www.camposdesolana.com
 Contact address:
 Telephone: (591) 466 48481
 Winery Address: Carretera a Bermejo Km 12 Zona El Portillo Tarija
 Mail: info@camposdesolana.com
 Winemaker: Nelson Sfarcich



Description of the winery:

Campos de Solana was born to take up the challenge of creating wines that are faithful reflections of its origins, showcasing Tarija's extreme viticulture conditions. Campos de Solana's main purpose is to show that through tradition and innovation, Bolivia has the potential required to produce world-class wines. Our passion for our vineyards and high-quality winemaking are ingrained in our work philosophy.

Facts and Numbers:

Age of the winery: 14 years
 Annual production (Liters): 1,300,000 litres
 Varieties produced: Tannat, Cabernet Sauvignon, Malbec, Merlot, Petit Verdot and Riesling
 Vineyard height: 1,850 masl

Gold Medals:

Trivarietal de Campos de Solana

- "Wine Of The Year 2014", by the World Association of Writers and Journalists of Wines and Spirits, first Bolivian wine to achieve this award



- Double Gold Medal, Vinus 2013, 93 Points, Concurso Internacional de Vinos y Licores VINUS, Mendoza-Argentina, 9-10 August 2013



- Gold Medal, Terravino 2013, Mediterranean International Wine & Spirit Challenge, Jerusalem, Israel, 09-12 December 2013



- Gold medal, VINO CHALLENGE INTERNATIONAL WINE COMPETITION, USA, 2008, Dutch Valley Place N. W. Atlanta, GA, USA, 03-10 September 2008



Rose de Campos de Solana

- Gold Medal, "La Mujer Elige" 2012, Concurso Internacional de Vinos y Licores La Mujer Elige. Mendoza Argentina, 30-31 October 2012



Reviews:

"Campos de Solana's Bolivian wine behaved excellently, the Trivarietal obtained two silver medals in Brussels and dazzled us, the French oak aromas from its rest place presented themselves in the secondary aromas. Touches of vanilla, smoke, toast, ripe red and black fruits and spices were present in the tertiary aromas and fruity and floral aromas in the bouquet and primary aromas." – Cata buen vino

"What makes the difference between the fruits obtained at Campos de Solana and the rest of the vines in Bolivia? The wines made at Campos de Solana are primarily a result of nature and the weather, the quality of the vines and cultivation techniques, the watering of the vines and a proper management after the harvest, including careful winemaking". –Ramon Freixa (Wine Journalist)

"The Santa Ana Valley's well-balanced terroir will be found when tasting, the soil delivers the appropriate minerality and acidity inherited from the volcanic heritage of the Andes obtaining natural, organic product without any additives. Campos de Solana's wines have strong personalities and characters, well above the national average. These are wines of natural upbringing."
Sergio Correa (winemaker)

Wines for Export:

Trivarietal 2011

French Oak Barrel aged Reserve wine

Origin:	Finca "El Monte", Santa Ana la Nueva, Tarija
Composition:	75 % Cabernet Sauvignon, 15 % Malbec, 10 % Tannat.
Vintage:	2011
Harvest:	Handpicked, during early morning hours
Vineyard Altitude:	1,850 masl

Tasting notes: Intense and deep red violet. Elegant, rich aromas of blackberry and blueberry, with hints of smoke, tobacco, vanilla and chocolate. Kind, meaty and spicy. Well-structured and persistent.

Alcohol: 14.4%

Cabernet Sauvignon

Varietal

Origin: Finca "El Monte", Santa Ana la Nueva, Tarija

Vineyard Altitude: 1,850 masl

Vineyard age: 15 years

Tasting Notes: Red with cedar edges. On the nose, mature black fruits, such as black cherry and hints of lavender. Silky on the palate, firm tannins, well structured, with a pleasant lasting finish. With hints of coffee and black chocolate.

Malbec

Origin: Finca "El Monte", Santa Ana la Nueva, Tarija

Vineyard Altitude: 1,850 ,masl

Vineyard Age: 17 years

Tasting Notes: Intense red with blue undertones. Complex aromas of red fruits, with delicate hints of Wood. Smooth in mouth. Elegant and well balanced, with notes of plums and cherries.

Merlot

Origin: Finca "El Monte", Santa Ana la Nueva, Tarija

Vineyard Altitude: 1,850 masl

Vineyard Age: 13 years

Tasting Notes: Cherry red with violet nuances. On the nose, blackberry, cassis, and cherry. Well balanced on the palate, noble tannins and long finish.

Tours and Wine Tasting:

Campos de Solana is a modern and accessible winery known for the quality of its wines. Its staff is friendly, helpful, and welcoming. Enjoy the spectacular climate in Tarija, while tasting some of Bolivia's most prized wines as well as learning about their production.

The winery tour is free. Wine tasting fees vary according to selection.

Hours: Monday through Friday from 9:00 to 11:00
and 13:00 to 16:00
Saturdays from 9:00 to 11:00

Reservations: visitas@camposdesolana.com

Telephone: (591) 4 664 8482

Address: Carretera a Bermejo Km 12 Nro s/n, El Portillo
Tarija – Bolivia



- **Casa grande**

Winery name: Bodegas y Viñedos Casa Grande S.R.L.
 Web Page: www.casagrande.com.bo
 Contact address:
 Telephone: (591) 4 66 72146 – (591) 4 66 72147
 Winery Address: Bermejo Highway, La Pintada
 Tarija
 Mail: sedanosanchezte@yahoo.com.ar
 Winemakers: Gustavo Agostini and Cándido Tolaba Arce

Winery description:

Our winery was born from the passion and tradition of wine activity. We have made important investments both in machinery and high-end equipment, as well as in first-class French quality oenological material.

Facts and Numbers:

Age of the winery: Producing wine for more than 10 years
 Annual production: 450,000 Litres/year
 Varieties produced: Cabernet Sauvignon, Malbec, Syrah and Merlot
 Winery height: 1800 to 2200 masl
 Gold Medals:



Silver Medal at Vinalies Internationales 2009 Paris for our Trivarietal wine

Gold Medal at Selections Mondiales Des Vins 2013 Canada for our Crianza Malbec wine

Gold Medal at Selections Mondiales Des Vins 2013 Canada for our Crianza Cabernet Sauvignon wine

Reviews:

Undoubtedly, the best barrel and wine selections, from delicate and noble grapes like the robust Cabernet Sauvignon, the refined Merlot and the emblematic Malbec, bring in to this elixir an absolute harmonious sensation.

Wines for Export:

Trivarietal 2008

Wine blend: Produced with the blend of our best wines:
 Cabernet Sauvignon 50%, Malbec 25% y Merlot 25%

Tours and Tastings:

Bodegas Casa Grande is part of the Wine Route in Tarija; we are open to the public Monday-Friday from 8:30 to 16:30 and Saturday from 8:30 to 12:30. Our guided tour includes the production area, wine vaults, tasting room, vineyard and spa, and has been carefully prepared by our oenologist. Visitors will thoroughly enjoytasting our products and can purchase our products at winery prices at our special Mini Store .

- **Casa real**

Name of the Distillery: SINGANI CASA REAL
 Distillery's website: www.casa-real.com
 Contact Address:
 Telephone: (591) 4 663 1933
 Address: Santa Ana, Tarija, Bolivia
 E-mail: info@casa-real.com

Master Distiller: Jorge Furió
 Master Distiller's picture



Winery description:

Luis Granier Ballivián and his family founded Sociedad Agroindustrial del Valle Ltda., the company that makes Singani Casa Real. Today, the family's fourth generation continues an 80-year-old tradition of excellence in Singani making, using a unique and carefully guarded method of distillation. The company combines the unique location of its vineyards with a workforce committed to excellence, high technology, next-generation French stills and French vines to secure a preferred place in the hearts of our consumers.

Facts and Numbers:

Age of the winery: Founded in 1981 (33 years)
 Annual production (Liters): 2,700,000 litres
 Varieties produced: Muscat of Alexandria
 Vineyard height: 1,850 masl
 Gold Medals:

PRODUCTO	PREMIOS	PAIS ORGANIZADOR
Gran Singani	GRAN ORO/ Vinus 2013	ARGENTINA 
Gran Singani	GRAN ORO/ Vinalies Latinoamérica 2009	CHILE 
Gran Singani	GRAN ORO/ Mondial Do Bruxelles 2009	CANADÁ 
Singani 63	ORO/ International Graft Awards Competition 2013	E.E.U.U. 
Singani 63	GRATE EVALUE/Ultimate Spirits Challenge	E.E.U.U. 
Singani 63	GOLD MEDAL / International Review of Spirits Award/ RATING: 94 points (Exceptional)	E.E.U.U. 

Reviews:

"This extraordinary spirit is very much a product of its environment. The quality of the soil, nature of the climate and the character of the groundwater all contribute to the personality of the finished spirit."

– Robert Plokin

"Singani arrived in the American market thanks to the Oscar-winning director Steven Soderbergh. When he was in Bolivia filming the movie "Che" he became enamored with the spirit and decided to take it to the United States with his own brand and sell it to Hollywood's elite."

–Página 7 (National newspaper)

"Singani Casa Real has claimed the "Best Distilled" award in the "Vinalies Catad'Or Latin America" contest organised by the Oenologist Union of France and sponsored by the International Wine Organisation and the Genuine Wine Competitions Federation. In this prestigious competition, more than 500 samples from over ten countries were tasted and Singani Casa Real was awarded the top prize."

– Cata Buen Vino

Singanis for Export:

Singani Aniversario 15 Años "Don Lucho"

The ultimate expression of the family's tradition, kept since 1925

Triple distilled spirit, with a fine balance between intensity and elegance in its bouquet

Composition: 100% Muscat of Alexandria

Gran Singani (Etiqueta Negra)

A Premium spirit. Made according to a method that has been carefully guarded method since 1925. Noble with well-balanced citric and floral aromas. Velvety in the palate.

Composition: 100% Muscat of Alexandria

Tours and tastings:

Casa Real is a distillery that mixes tradition with modernity. It is known for the quality of its Singanis. Its kind and helpful workers will be happy to receive you.

Enjoy Tarija's climate while you taste the best Singani in Bolivia and learn about its production.

The tour is free and you can walk by the vineyards and the distillery. You can also ask for guided tastings.

Contact: (591) 4 664 5498

allanos@casareal.com

www.casa-real.com

Hours: Monday through Friday 8:30 to 11:00 and 13:00 to 16:00
Saturday 8:30 – 11:00

Location: Santa Ana (18 km away from the city) - Tarija, Bolivia

- **El potro**

Winery name: Casa Vinícola El Potro
 Web Page: www.bodegaselpotro.com
 Contact address:
 Telephone: (591) 4 6666956
 Winery Address: José Maria Villena No. 4 – San Gerónimo
 Tarija
 Mail: vinoselpotro@gmail.com
 Winemaker: Hugo Ibáñez Trigo

Winery Description:

Casa Vinícola El Potro is a family boutique winery, located in the city of Tarija, and specialising in handcrafted varietal wines, with limited production volumes. The winery is a plant for small-scale production, but well equipped and designed to produce wines through a process of gravitational winemaking.

Facts and Numbers:

El Potro wine was first made in the year 1974, on the occasion of the fourth centenary of the founding of Tarija.
 Annual production: Current production is 8,000 litres
 Produced varieties: Muscat of Alexandria, Syrah and Malbec

Expert commentaries:

"The Moscatel wine is the best product in price-quality relation tasted in the country"
 Luis Vicente Elias Pastor - Anthropologist, writer, Vins et Territories OIV 2012 International Award

"All wines were pure and fruit-driven, with excellent varietal character, complexity and concentration"
 - Cees van Casteren – Master of Wine

Wines for Export:

Muscat 2013

Aromatic, with impressions of rose petals, lychee and white peach, and a zesty taste of apricots, white apples and grapefruit. Great with Asian food.

Variety: 100% Muscat of Alexandria
 Short description: Medium body, medium sweet, 12.5% alcohol

Syrah 2012

Spicy and fruit-packed Syrah in a Northern Rhone style, with blackcurrant and plum and soft ripe tannins and excellent freshness. Combine with game or lamb.

Variety: 100% Syrah
 Short description: Medium body, dry, 13.5% alcohol

Malbec 2011

Meaty and pungent, plummy Malbec with impressions of vanilla and smoke, tobacco and ripe tannins; a wine that lingers hauntingly on the palate. Excellent companion of entrecôte.

Variety: 100% Malbec
 Short description: Medium body, dry, 13.2% alcohol

Guided Tours:

We offer guided tours of our facilities, during which visitors can learn about the history of the winery, the process of gravitational wine making and care. The tour ends with a tasting of our wines, accompanied by goat cheese, ham and olives.

In our tasting room, visitors can purchase the products from our cellar, regional accessories and handicrafts at promotional prices.

For tourists, we also offer unique, customised labels.

The tour lasts about 45 minutes.

Visiting hours: Monday to Friday - Mornings from 9:30 to 11:30 / Evenings from 15:00 to 17:30
 Saturdays, Sundays and holidays from 10:00 to 11:30
 Night-time visits by reservation
 Lunches and private dinners for groups of 10 people by reservation

Contact for bookings:
 Telephone: (591) 729 85838

- **Kohlberg**

Name of the Winery:	Bodegas y Viñedos La Cabaña SRL
Web Page:	www.bodegaskohlberg.com
Contact address:	
Telephone:	(591) 4 663 6366 and 664 2782
Winery address:	Av. Jorge Galarza, Barrio San Jorge No. 1 Tarija
Mail:	ventas@bodegaskohlberg.com
Winemaker:	Herbert Kohlberg and Erich Kohlberg
Winery description:	Family-owned vineyard with 115 ha of vineyards
Facts and Numbers:	
Age of the winery:	Since 1963
Annual Production:	3.2 million litres/year
Varieties produced:	Syrah, Cabernet Sauvignon, Malbec, Barbera, Garnacha, Muscat of Alexandria, Torrontes, Ugni Blanc
Review:	
"In Tarija, Bolivia; tried Kohlberg's Ugni Blanc; dry white, minerally complex, great freshness yet creamy texture; tasted great." - Cees van Casteren, Master of Wine	
Tours and tastings:	Yes

- **La concepción**

Winery Name: Bodegas y Viñedos de La Concepción SA
 Web Page: www.laconcepcion.bo
 Contact address:
 Telephone: (591) 466 32 250
 Office address: Calle Colón #585, Tarija, Bolivia
 Mail: info@laconcepcion.bo
 Winemaker: Jhonny Salguero Torrez



Winery description:

La Concepción is a family-owned winery located at the heart of the Concepción Valley, 27 kilometres south of Tarija. As pioneers in the production of varietal wines in Bolivia, we are proud to produce very high quality wines that reflect the uniqueness of our terroir, our well-kept vineyards and our winemaking tradition.

Facts and Numbers:

Age of winery: 28 years
 Annual production: 400,000 litres
 Varieties produced: Syrah, Merlot, Cabernet Sauvignon, Chardonnay, Sauvignon Blanc, Muscat of Alexandria
 Height of vineyards: 1,700 and 2,100 masl

Reviews:

"Tasted Cepas de Altura 1994 in beautiful vineyards of Viña La Concepcion in Tarija; beautiful mature left-bank Bordeaux style from Bolivia."
 Cees van Casteren, Master of Wine

Wines for Export:

Cepas de Altura Syrah 2013

With a beautiful deep purple colour, this wine has a unique fruit-driven and opulent character. Touches of cassis, black fruit and plum, balance perfectly with sophisticated notes of clove and smoke with soft and harmonic pass through the mouth.

- Full-bodied, medium + acidity, great potential for agin.
- Dry, 13.0% alcohol.

Cepas de Altura Cabernet Sauvignon 2013

With its bright ruby colour and amazing bouquet of black cherry, blackberry, green peppers, and tobacco, this unique and fruity Cabernet Sauvignon surprises us with its intense taste with notes of black fruit and smoke finishing with a long and balanced aftertaste.

- 100% Cabernet Sauvignon
- Full bodied, medium + acidity, medium + tannins
- Dry, 12.8% alcohol

Tours and wine tastings:

With 28 years of experience, we are the pioneers in the production of varietal wines in Bolivia and a main player in the history of our country's viticulture. Guests visiting our winery and vineyards can witness this evolution, as well as appreciate and learn about our unique winemaking processes.

Our main vineyard, *La Compañia*, is a beautiful 40-hectare estate surrounded by Andean mountains and bordered by the Camacho River. This vineyard is home to the first varietal vines imported from France and the United States in the

early 90's. It is also home to 300-year-old Muscat of Alexandria vines planted by Jesuits; these vines are still productive, growing around our centenary *molle* trees. We are open to the public from Monday to Saturday; we also offer customised tour packages and wine tastings that accommodate the needs of our guests. Contact us at: info@laconcepcion.bo

- **Los parrales**

Name of the Winery: Kuhlmann & Cia Ltda.
 Web Page: www.bodegaskuhlmann.com
 Contac Address:
 Telephone: (591) 4 6644346
 Address: N/N Franz Kuhlmann Street, 4 Km San Luis-Tarija
 E-mail: produccion@bodegaskuhlmann.com

Winemaker: Franz Carlos Molina Conzelmann
 Picture of winemaker:



Winery description:

Kuhlmann & Cia Ltda. is one of the pioneering wineries in Bolivia, established in 1930 and now the oldest winery-distillery in Bolivia. The name of the winery can be traced back to its founder, Franz Kuhlmann. Kuhlmann & Cia Ltda. is a winery-distillery dedicated to the production of high-quality Singanis and High Altitude Sparkling Wines, with more than 84 years of tradition, experience and quality.

Facts and Numbers:

Age of the Winery-Distillery:	84 years
Singani annual production:	400.000 litres
Sparkling Wine Production:	20.000 litres
Grape Varieties for Singani:	Muscatel of Alexandria
Grape Varieties for Sparkling Wine Altosama Demi Sec:	Chardonnay, Pinot Meunier, Xarello, and Muscat of Alexandria.
Grape Varieties for Sparkling Wine Altosama Brut:	Xarello, Parrellada.
Grape Varieties for Sparkling Wine Altosama Rose:	Tempranillo, Pinot Meunier, Marselan
Altitude of the vineyards:	1,855 masl

Gold Medals and international awards:

Singani Los Parrales Reserva Aniversario

- Great Gold Medal (CINVE, Spain 2014)
- Gold Medal (Vinandino, Argentina, 2013)
- Gold Medal (Latin America Vinalies, 2011)
- Great Gold Medal (Brussels World Contest, 2010)
- Gold Medal (Vinandino, Argentina, 2009)
- Gold Medal (CINVE, Spain, 2009)
- Gold Medal (International Vinalies, Paris-France, 2006)



Singani Los Parrales Reserva Aniversario

"Clear scents of white flowers, citrus and fresh grape skin; not any alcohol sensation. Dry on the palate, lively, very delicate and with a long and pleasant after-taste. Spectacular!"

Roberto Colmarejo - Argentinian Sommelier

High-altitude sparkling wine Altosama Demi Sec.- "Striking, irresistible"

Roberto Colmarejo, Argentinian Sommelier

Wines and Spirits for Export:

Singani Los Parrales "Reserva Aniversario" 2012

Singani produced with the best grape selection of the Muscatel of Alexandria grape variety, in a microclimate with high luminous density and high thermal amplitude, which makes the aromas of the Singani more intense with much personality, great balance in the mouth and soft persistency on the palate.

Grape Variety: 100 % Muscatel of Alexandria

Brief description of Singani Los Parrales Reserva Aniversario: notes of orange peel, white peach, jasmine and Hierba-buena.

Altosama Demi Sec 2013

High-altitude sparkling wine made using the French "Charmat" method with grapes from our vineyards, cultivated at more than 1,850 masl in the central valley of Tarija, which is protected by the Sama mountain range. Its subtle fruity aroma and its persistent fine bubbles distinguish it with an excellent balance between acidity and sweetness.

Grape Variety: Chardonnay, Pinot Meunier, Xarello, and Muscatel of Alexandria

Brief description of Sparkling Wine: fine fruity scents such as grapefruit, pineapple, lemon and floral jasmine scent.

Altosama Rose 2013

Altosama Rose is a high-altitude sparkling wine made using the French "Charmat" method with grapes from our vineyards, cultivated at more than 1,850 masl.

Grape Variety: Tempranillo, Pinot Meunier, Marselan

Brief description of the sparkling wine: intense fruity character of red fruits such as strawberry, cherry and plum, in combination with citrus notes and very fresh floral notes.

Altosama Brut 2014

Coming soon!

Tours and tasting:

Our Tours and Tasting programme will begin in January 2015.

- **Magnus**

Winery name: Bodegas Magnus SRL
 Web Page: www.bodegasmagnus.com
 Contact Address:
 Telephone: (591-4) 611 2462
 Of. Address: Calle Ingavi #244, Tarija
 Winery: Zona Torrecillas
 Mail: bodegamagnus@gmail.com

Winemaker: Liz Arancibia de Magnus

"Every year our winery is set against a slightly different landscape, with unique colours, flavours and aromas. All of these conspire to draw out the best influences of the region, the soil, the water, the climate, our vine and cultivation methods for the purpose of harvest an accomplished wine.

We are convinced that our wines must not only be complex and unique, but also carry the passion, strength and spirit of our land." - Ernesto Magnus and Liz Arancibia de Magnus

Year Founded: Producing wines since 2003
 Annual Production: 15,000 litres/year
 Varieties produced: Syrah, Cabernet Sauvignon and Merlot
 Vineyard height: 2,160 masl

Reviews:

"... and another one that also impressed me because it comes from a boutique winery, a very new winery where the wine is made by a girl that did not study enology but learned from her father and gave me a very romantic explanation; it is the case of another wine that left me overwhelmed. Bolivia has wines for about 10US\$ of very good quality."

Jaime Duran Pedreros

Gold and Silver Medals:



Winner of the International Wine Challenge, International Wine & Spirit Competition and Decanter World Wines Award

Wines for Export:**Magnus Cabernet Sauvignon 2011**

Grape Variety: 100 % Cabernet Sauvignon

Short description: Full-Bodied, Dry, 13.70 alcohol

Magnus Syrah-Cabernet Sauvignon 2011

Grape Variety: 65% Syrah and 35 % Cabernet Sauvignon

Short description: Medium body, dry, 13.40% alcohol

Magnus Merlot-Cabernet Sauvignon 2011

Grape Variety: 60% Merlot, 35% Cabernet Sauvignon and 5% Syrah

Short description: Medium body, dry, 13.50% alcohol

Magnus Cabernet Sauvignon-Merlot-Syrah 2011

Grape Variety: 40% Cabernet Sauvignon, 30% Merlot and 30% Syrah

Short description: Full-Bodied, dry, 13.50% alcohol

Magnus L Rose 2014

Grape Variety: Bleeding of Cabernet Sauvignon, Syrah and Merlot

Short description: Full body, 8gm residual sugar, balanced acidity, 13.50% alcohol

Tours and tastings:

- Visits to the winery with previous reservation
- Comparative wine tastings of different vintages
- Home-made delicatessen table

- **Sausini**

Winery name: BODEGAS SAUSINI
 Web Page: www.bodegasausini.com
 Contact address:
 Telephone: (591) 76068882
 Winery address: El Temporal, San Luis - Tarija
 Mail: bodegasausini@yahoo.com

Winery description:

Bodega Sausini is a winery with vineyards situated in the valleys of San Luis and Sunchuwuayco in the department of Tarija. In every single product of this boutique winery, one feels the passion and dedication devoted to the growing of the grapes, the production of the wines and singanis as well as the aging process. The results are wines and singanis with very high quality levels, with an intense taste and identity typical of the region where they are produced. Sausini is much more than a brand; it is the soul and tradition of an entire family.

Facts and Numbers:

Age of the winery: Since 2004
 Annual production: 30,000 litres per year
 Varieties produced: Cabernet Sauvignon, Merlot and Moscatel de Alexandria
 Vineyard height: 1,750 and 1,850 masl

Reviews:

"Sausini has the most ripe and concentrated style of all producers in Tarija. Their top wine could be a good Cru Bourgeois in Bordeaux." - Cees van Casteren, Master of Wine

Gold Medals:



Internacional Tasting of Wines and Spirits CINVE 2011 (Spain)
 - Gran Medalla de Oro – Singani Sausini
 Internacional Tasting Vinandino 2013 (Argentina)
 - Medalla de Oro – Cabernet Sauvignon 2010
 Internacional Wine Tasting Ensenada Tierra del Vino 2014, (Mexico)
 - Medalla de Oro – Blend 2011 (Cabernet Sauvignon and Merlot)

Wines for Export:

Cabernet Sauvignon 2010

Grape Variety: 100% Cabernet Sauvignon

Tours and Tastings: Upon request

Wineries in the Valley of the Cinti

- **La casona de molina**

Winery name:	"LA CASONA DE MOLINA"
Web Page:	www.lacasonademolina.com
Contact address:	
Telephone:	(591) 72943850 (591-4) 6292674 - 6292189 - 6292191
Winery address:	Km 5,5 Camargo – Tarija Road, Camargo, Province of Nor Cinti, Department of Chuquisaca
Mail:	marmol_12@msn.com
Winemaker:	Mario Molina
Age of the winery:	Became a boutique winery in 2005
Annual Production:	20,000 bottles
Varieties produced:	The winery buys from traditional centennial vines grown around molle trees of Moscatel de Alejandría, Negra Criolla, Cabernet Sauvignon, Vicchoqueña and Cereza.
Name of Signature Wine:	Don Martín
Tasting Room:	Yes
On-site restaurant:	Yes

- **Ocho estrellas**

Winery Name:	SAN ANTONIO – SINGANI OCHO ESTRELLAS
Web Page:	No
Contact address:	
Telephone:	(591-4) 6292192 and (591) 76730076
Winery address:	Km 2 from Camargo
Mail:	
Winemaker:	Rodrigo Espinoza
Age of the winery:	Founded in 1987
Annual Production:	15,000 bottles of wine and 25,000 bottles of singani
Varieties produced:	Cabernet Sauvignon, Negra Criolla, and Muscat of Alexandria
Name of Signature Wine:	Cabernet Sauvignon - Ocho Estrellas
Tasting Room:	Yes

- **Tierra roja**

Winery Name:	Bodega Tierra Roja
Web Page:	www.bodegatierraroja.com
Contact address:	
Telephone:	591 73595590
Winery address:	Calle Ossio, Villa Abecia, Chuquisaca
Mail:	bodegatierraroja@gmail.com
Winemaker:	Cristian Villamor

Winery description:

Bodega Tierra Roja is located in the Valley of Cinti at 2,300 masl, surrounded by red mountains that get their colour from the iron and magnesium components in the soil. In the vineyard, we have developed a lunar cycle for the work carried out during the year and we produce our own compost. In our winery, we have perfected our style, aiming to produce fresh and fruity wines. No more than 5 people compose bodega Tierra Roja, because we believe that our products represent the dedication of each one of us.

Facts and Numbers:

Age of the winery:	The vineyards started in 2005 and the winery was established in 2010
Annual production :	10,000 litres/year in the next 5 years (target)
Varieties produced:	Cabernet Sauvignon and Malbec in reds and Moscatel de Alexandria in white wine
Vineyard height:	2,309 masl

Review:

"This winery is a work in progress and has a very active owner." - Cees van Casteren, Master of Wine

Wines for Export:

Tierra Roja

Tierra Roja is a fresh fruity wine, with excellent concentration. It has well-developed Cabernet characteristics with some mineral flavours. A balanced aroma between spices and red fruits. Produced with special care from the plant to the bottle.

Tours and Tastings:

We welcome customers in our vineyard and winery on appointment.

Wineries of Valley of Santa Cruz

- **Uvairenda**

Winery name: Uvairenda SRL
Web Page: www.uvairenda.com
Contact address:
Telephone: (591) 760 61430 and (591) 705 26650

Office address: Equipetrol, calle 5 oeste # 114
Santa Cruz de la Sierra, Bolivia
Winery address: Road to Valle Abajo, by the hotel "El Pueblito"
1,100 meters southwest of the main plaza of Samaipata
Samaipata, Santa Cruz
Mail: contacto@uvairenda.com

Winemaking Team: Francisco Roig, Roberto Aguilar, María Eldy Contreras

Picture of winemakers:

Winery description:

Our 1,750 wines are produced by the exclusive boutique winery of Uvairenda in the valley of Samaipata in Santa Cruz, Bolivia. Uvairenda is dedicated to the production of high quality wines on a small scale, and to serve as the gateway to the wonderful world of the Valleys of Santa Cruz. In our winery, you can enjoy the secrets of the wine-making experience, while learning about the essence of our terroir, enjoying the beauty of the valley and tasting our wines. Samaipata is a perfect point of entry to the Valleys of Santa Cruz, a paradise just 2 hours southwest of Santa Cruz de la Sierra, Bolivia's largest city.

Facts and Numbers:

Age of the winery: Established in 2007, our winery continues the tradition of more than 400 years of wine producing in the valleys of Santa Cruz
Annual production: 10,000 litres of annual production
Varieties produced: Syrah, Tannat, Cabernet Sauvignon, Malbec, Cabernet Franc
Torrontés, Sauvignon Blanc, Pedro Giménez, Riesling, Muscat de Alexandria

Vineyard height: 1,750 masl

Tours and Tastings: We offer guided tours and wine tasting 7 days a week, 365 days a year

This survey was compiled for CBI (Ref.: 273-3980) by Sergio Prudencio Navarro (Tarija, Bolivia)
August 2014

Disclaimer CBI market information tools: <http://www.cbi.eu/disclaimer>

Annex 1 – background information

Introduction of Grapevines by the Spaniards - 1548

Grapevines were introduced in Bolivia – and much of the rest of South America - in colonial times, with the arrival of Spanish conquerors in 1548. The main varieties introduced were “Moscatel of Alexandria” and “Misionera”, also known as “Negra Criolla”. These grape cuttings thrived in the Bolivian valleys and were soon taken to the most remote corners of the country. In those days, grapevines were wrapped around molle trees according to a stunningly beautiful traditional method that can still be seen today in most of the valleys of the country.

Production of wine and Singani for the mines in Potosí

In 1545, the great Cerro Rico (rich mountain) of Potosí was rediscovered by Spanish conquerors. It is a silver mine of such dimensions that stories about it reached the ends of the world, attracting numerous adventure seekers to settle in Bolivia. By 1630, the great city of Potosí had a larger population than most of the capitals of Europe, including London. The mines of Potosí were at their peak in those days: the largest and richest silver mines in existence, producing the craved mineral for most of the world. It has been rumoured that the silver extracted from the Cerro Rico in this period would have been enough to build a bridge across the continent, linking Potosí to Spain.

Silver coins were Potosí's main export product. They were taken across Europe and into the rest of the world. The great wealth of the colonial city would soon demand the most exquisite products from around the globe, including large quantities of wines and distillates. Potosí became indeed the “Paris of the new world”. The established European culture required that Bolivia produce its own wine and distillates in its neighbouring valleys.

Since Potosí rises to an altitude of 4,050 masl, or over 13,000 feet asl, Bolivian wines were distilled to produce a strong beverage, that would protect the population from cold weather. This is how Bolivia's traditional drink, singani, came into being. A noble, clear and pure distillate of Moscatel of Alexandria grapes grown above 1,600 masl, singani does not require ageing in wood barrels, because even after being distilled it retains its typical elegance and Muscatel aroma.

Singani produced with French technology in Los Cintis

By the 1930s, the latest French technology was introduced to wineries in the region of Los Cintis, a region concentrating mainly on the production of singani. As the years passed, the region developed so quickly in the production of singani and wine that it became the largest industrial tax contributor of the country.

Introduction of new technology in the production of wines in Tarija

Around the late 1960s, Bolivian wineries started investing in technology from Argentina, with the purpose of spreading the production of wine in the Central Valley of Tarija. This modernization and expansion marked the beginning of an important period, in which wine makers left artisanal wine production behind and immersed themselves in more controlled and fully modernised production processes. Soon, a well-developed viticulture sector was established throughout Tarija, producing both table wine and singani. Starting in 1978, noble European grapevines were introduced at a commercial level; using modern wine technologies, the region began to tap into its great potential for the production of premium quality wines in the high altitude valleys of Bolivia.

Annex 2 - business contacts

Trade Associations

ANIV	Bolivian National Association of Wineries of Wine and Singani (anivgerencia@gmail.com)
IG-Cinti	Geographic Indication of the Valley of Cinti (www.igvalledecinti.org)
CADEX	Departmental Chamber of Exportation of Santa Cruz (www.cadex.org)
CANEB	Bolivian National Chamber of Exportation (www.caneb.org.bo)
CAINCO	Industrial and Commercial Chamber of Santa Cruz (www.cainco.org.bo)
CENAVIT	National Viticulture and Enology Center (www.tarija.gob.bo/cenavit)
CNI	Bolivian National Chamber of Industry (www.bolivia-industry.com)
FAUTAPO	Foundation of the Autonomous Universities of Tarija and Potosí (www.fundacionautapo.org) (one of the largest Bolivian development foundations that assisted the wine and singani sector)
FEPT	Federation of Private Enterprises of Tarija (www.fept.org)
OGD	OGD Destino Tarija (www.destinotarija.bo)
OIV	International Organisation of Vine and Wine (www.oiv.int)
SENASAG	National Agricultural Sanitary Service (www.senasag.gob.bo)
TAS	Tarija, Aromas and Flavors (www.tarijaaromasysaborers.com)
WoA	Wines of Argentina (www.winesofargentina.org)
WoAf	Wines of South Africa (www.wosa.co.za)
WoAu	Wines of Australia (www.winesofaustralia.com)
WoB	Wines of Bolivia (www.winesofbolivia.com)
WoBr	Wines of Brazil (www.winesofbrasil.com)
WoC	Wines of Chile (www.winesofchile.org)
WoNz	Wines of New Zealand (www.nzwine.com)
WoU	Wines of Uruguay (www.winesofuruguay.com)

Annex 3 - media library

Media Library with Press Releases

<https://www.facebook.com/XIVcongresolatinoamericanodeviticulturayenologia?fref=nf> (20Nov13)
<https://twitter.com/ceesvancasteren>
<http://www.foodandwine.com/blogs/2013/10/23/wines-of-bolivia> (23Oct13)
<https://sites.google.com/site/bolivianwines/Home>
<http://www.wine-searcher.com/regions-bolivia> (20Sep13)
<http://news.cbi.eu/bolivia-introduces-wines-of-bolivia/> (29Ago13)
<https://www.youtube.com/watch?v=EGj62TRqLs8> (23Aug13)
<http://www.jancisrobinson.com/articles/from-copenhagen-to-la-paz> (18May13)
<http://www.wine-searcher.com/m/2013/05/winemaking-with-altitude-in-bolivia> (2May13)
<https://www.youtube.com/watch?v=h2yNrCtmVZq> (Wine Route-Tarija 28Jun12)
<https://www.youtube.com/watch?v=nEQbRARWtdc> (15Feb12)
<http://bolivianthoughts.com/2011/12/18/bolivian-high-altitude-wine/> (18Dec11)
<http://trekity.com/worlds-highest-wines-tarija-bolivia/>
<https://www.youtube.com/watch?v=pEJVqcgQcnA> (13Nov09)
<http://bordeaux-undiscovered.co.uk/blog/2008/08/wine-from-bolivia-and-butch-cassidy-and-the-sundance-kid/> (25Aug08)
<http://www.jancisrobinson.com/articles/despatch-from-the-top-of-the-wine-world> (17Aug05)
<http://news.bbc.co.uk/2/hi/business/1566196.stm> (28Sep01)
<http://www.truevineimports.com/qpage4.html>
<http://en.wikipedia.org/wiki/Singani>

Annex 4 - news

<https://www.youtube.com/watch?v=KGnv5R60fJg> (Medalla Gran Oro-Tannat Aranjuez 4Aug14)
<https://www.youtube.com/watch?v=bJXE5979N7s> (Medalla Gran Oro-Tannat Aranjuez 25Ene14)
<https://www.youtube.com/watch?v=zxrBxYKu4dU> (Kjarkas Music-Vendimia 2013-4Mar13)

Annex 5 – event calendar

20 Sep 14	Bud burst starts
6-7 Oct 14	VI International Meetings on Viticulture and Enology - Tarija
12 Oct 14	National elections
2 Nov 14	Holiday – All Saints day
Nov 14	National Presentation of Wines of Bolivia
Nov 14	Jam and Cheese Festival - Tarija
25 Dec 14	Holiday – Christmas
1 Jan 15	Holiday – New Year
15-17 Mar 15	ProWein 2015 – Bolivian Stand #... at Hall 9
Feb-Apr 15	Grape harvest
Mar 15	Grape and Wine Festivity – Concepción, Tarija
Mar 15	XI National Wine and Singani Festival – Camargo, Cinti
Mar 15	8th Encounter of Art and Wine - Tarija
15 Apr 15	Holiday in Tarija – Day of Tarija
1 May 15	Holiday – Work day
May 15	First frosts of the year
Jun 15	Wine and Cheese Festival – Santa Cruz
6 Ago 15	Holiday - National Day of Bolivia

Annex 6 – information on wine travel

CBI published a market intelligence study on Wine tourism in Bolivia, this study can be downloaded from <http://www.cbi.eu/market-information/wine/europe-bolivia/wine-tourism>

Tourism Agencies in Bolivia

Magri Turismo: www.magriturismo.com
Crillon Tours: www.titicaca.com
Transturin: www.transturin.com
Bolivia Milenaria: www.boliviamilenaria.com

Tourism Agency in UK to visit Bolivia

High Lives Holidays: www.highlives.co.uk
Specialised in South America travel, from tailor-made to small groups

Visa policy of Bolivia

Citizens (ordinary passport holders) of specific countries and territories are eligible to visit Bolivia for tourism or business purposes without having to obtain a visa.

The Bolivian government distinguishes 3 groups of countries:

- countries whose citizens do not require a visa;
- countries whose citizens can obtain a visa on arrival;
- and countries whose citizens must obtain a visa in advance.

Visa exemption

Citizens of the following 49 countries and territories may enter Bolivia without a visa for period of up to 90 days:

- European Union (except Bulgaria, Cyprus, Malta and Romania who must obtain a visa upon arrival), Andorra, Argentina, Australia, Brazil, Canada, Chile, Colombia, Costa Rica, Ecuador, Japan, Mexico, Monaco, New Zealand, Panama, Paraguay, Vatican City and Venezuela.

Visa on arrival

Citizens of all other countries may obtain a visa for Bolivia valid for 90 days upon arrival for US\$ 52. Nationals of the United States in order to obtain a visa on arrival must hold a hotel reservation or letter of invitation and sufficient funds plus US\$ 135 in cash for a visa.

Nationals of Iran can obtain a visa on arrival for 30 days only at Cochabamba, La Paz, and Santa Cruz airports.

This is not applicable to nationals of the following countries and territories:

- Afghanistan, Angola, Bhutan, Cambodia, Chad, China, Democratic Republic of the Congo, Hong Kong, Indonesia, Iraq, Israel, Democratic People's Republic of Korea, Laos, Libya, Macao, Nigeria, Pakistan, Palestine, Rwanda, Somalia, Sudan, verderSyria, Taiwan, Timor-Leste and Yemen.

How to reach Bolivia

The best way to travel from Europe to Bolivia is by BOA (Bolivian Airlines) or Air Europa with a flight to the city of Santa Cruz (Viru Viru Airport), followed by a connecting flight from Santa Cruz to the city of Tarija. You can also reach the city of La Paz (El Alto Airport) instead of Santa Cruz and connect to Tarija, but bear in mind that this airport is situated at 4,000 meters above sea level. For connecting flights to Tarija from within Bolivia you can take BOA, Amaszonas or Ecojet.

The main airlines flying from the USA to the Bolivian cities of Santa Cruz and La Paz are BOA, American Airlines, TACA, AVIANCA and LAN.

How to arrive to the wineries

All wineries from the Central Valley of Tarija are either in the city or in its surroundings. The wineries of Cinti are about 2 to 2 ½ hours by car going north from Tarija to Camargo in the direction of Potosi. The winery in Samaipata is about 2 ½ hours by car west from the city of Santa Cruz.

The wine regions of Tarija can be seen in three to five days, the wineries in Cinti in one to two days and the winery in Samaipata in one day.