

Table S1. Breakdown of Spanish wine (% volume) exported from the protected designation of origin (PDOs)

	2000/01	2016/17	2018/19
Ten main destinations	81.4	75.1	74.6
EU	78.6	63.4	60.3
Non-EU Europe	9.4	8.2	9.4
Americas	7.6	16.4	17.3
Asia	1.4	11.0	11.3
Rest of the World	3.1	1.1	1.7
Total	100.0	100.0	100.0

Source: Own calculation based on Spanish Ministry of Agriculture, Fishing and Food (MAPA, 2020)

Table S2. Competitive methods associated to each pattern of strategic behaviour

Pattern classification	Items of the scale (Robinson & Pearce, 1988)	Comments and interpretation
Efficiency (Low price)	Specific efforts to ensure a pool of highly trained experienced personnel Extremely strict quality control procedures Emphasis on improving cost per unit Innovation in manufacturing processes Innovation in marketing techniques and methods Pricing below competitors ^[1]	Each competitive method is consistent with an effort to ensure efficient, cost-effective operations
Service (High price)	No concern for pricing below competitors (negative load) Customer service Reputation building efforts within industry Products in higher priced market segments Avoid low-priced market segments (negative load)	Consistent concern with extensive service to customers in higher-priced markets with the development of an industry reputation
R&D (Product innovation and development)	New product development Developing and refining existing products Emphasis on the manufacturing of speciality products Increased investment in process efficiency-oriented R&D	Seeks to emphasize specialized products and new developments or refinements based in part on process R&D
Marketing (Brand /channel influence)	Brand identification Strong influence over distribution channels New product development Innovation in marketing techniques and methods	Focus on brand recognition and strong influence over channels through efforts such as product development and new marketing techniques

^[1] In the efficiency strategy the price option of price below competitors has been included. The authors understand that in this way this strategy is reinforced giving importance to cost control, oriented towards offering lower prices than the competition. Source: Robinson & Pearce (1988) and own elaboration.

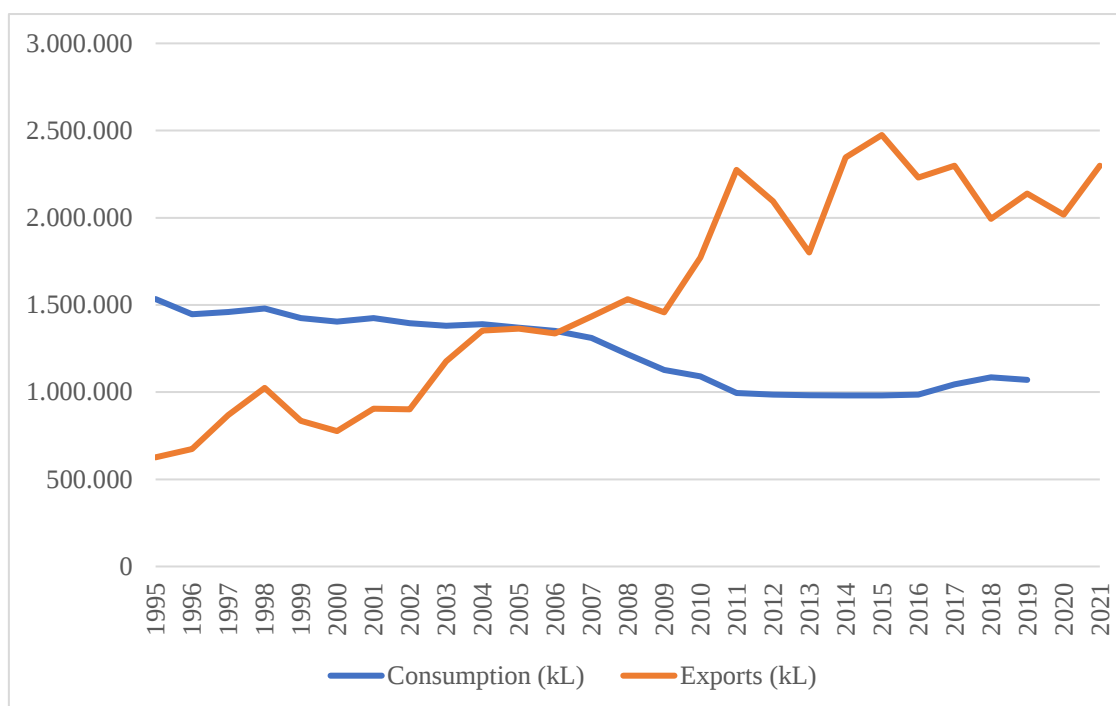


Figure S1. Spanish wine exports (volume) and consumption, 1995-2021. Source: OIV (2022) and OEMV (2022)