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Keywords
Wine industry, territory, local/rural development, Protected Designations of Origin, Protected Geographical Indications

Research Question
What is the nature of the recent performance of the wine industry in the region of Castile and Leon and Spain, with particular reference to POD and PGI areas.

Methods
Examination of the evolution of the most significant economic variables in the wine sector in Spain and Castile and Leon, with a comparative analysis by territories.

Results
Characterization of the wine industry in Spain and Castile and Leon. The relevance of Origin Denominations as an instrument for internationalization and local development in some rural areas.

Abstract
The agrofood industry (AFI) is one of the main branches of the manufacturing sector in Spain, both in terms of Gross Value Added, production, employment and exports. However, its importance is unequal across the Spanish geography, reaching a special relevance in certain Autonomous Communities, such as Catalonia, Andalusia and Castile and Leon; in this last region the AFI appears at the same time as a basic pillar of manufacturing growth, and as an invaluable instrument for territorial development, by the fact to maintaining multiple processes of rural / local development in progress.
Within the AFI, one strategic subsector is undoubtedly the wine industry, whose remarkable dynamism in recent years, at regional and national level, has placed Spain at the head of the ranking of exporting countries, ahead of France and Italy in volume terms. Some regions such as Castile-La Mancha, La Rioja, Catalonia, Valencia, the Basque Country and Castile and Leon are contributing to this fact in a particularly intense way, with an increasing export orientation. Anyway, in this environment of growing internationalization, quality wines produced in certains "Local Productive Systems" are playing an increasingly transcendental role.

The main purpose of this work is to reflect the performance of the wine subsector in the region of Castile and Leon over the recent years (of economic boom, crisis and recovery), with particular reference to the Protected Geographical Indications (PGI) and Protected Designations of Origin (PDO) areas.

For this objective, the work has been divided into three sections. The first section highlights, as a backdrop, the relevance of the agrofood industry at the national and Castilian-Leonese contexts; in this sense, a brief description of the sector in Spain and in the region is offered.

Within the Spanish industrial landscape, the AFI is one of the key sectors, both from the point of view of employment generation (showing a particular strength in the last years of crisis), and in relation to other multiple variables, such as the number of enterprises, the turnover, the investment in tangible assets, the amount of staff costs or the added value. This circumstance is especially visible in Castile and Leon: within its polarized industrial

context, the AFI occupies a prominent place, along with the branches of transport equipment, metal products and extractive and energetic industries. This concentration at sectoral level is also identifiable at the territorial level, with Valladolid and Burgos as the main manufacturing provinces, accompanied, in the case of the AFI, by the provinces of Leon and Salamanca.

The second section examines the situation of the Spanish wine industry. This branch is one of the main activities of the national AFI, due to the economic and social importance of viticulture and also because of its wide geographic dispersion, with presence in many rural municipalities, some of whom setting up local production systems, often related to the production of quality wines with strong links to the territory. This importance is reflected in its impact on the food trade balance, thanks to its growing export orientation, amid falling demand per capita consumption of wine (in strong competition with beer), accentuated by the economic crisis.
In this sense, strategies that Spanish wine companies are starring in an increasingly global stage, are particularly important. These strategies are conditioned by the changes linked to the European rules of the Common Market Organisation for wine, which involved, among other things, the inability to allocate public support to wine distillation or production of musts (especially affecting great cooperatives), or the boot of large areas of vineyard. Companies are mainly of domestic origin, as the penetration of foreign operators is much lower than in other manufacturing and food branches. Their general average size is quite small (6 employees per productive establishment), having set an important group of effective and diversified medium enterprises, producing both wine with a geographical designation and economic wines with an acceptable quality, increasingly related to: exports, the rise of new products (such as organic wines, no alcohol and low alcohol or wine-based drinks), the link wine-gastronomy and enotourism development. The PDO areas of La-Mancha, Rioja, Jerez, Cava, Cataluña, Penedés, Cariñena and Ribera del Duero are among others some of the most important examples in this regard.

The third section analyzes the case of the wine industry in Castile and Leon, emphasizing its production and export levels, its potential for employment generation and, therefore, its role as an element for territorial development, with special projection in the PDO zones of the region. Castile and Leon concentrates approximately 7% of the total area of vineyards in Spain, ranking fourth after Castile-La Mancha, Extremadura and Valencian Community. Although Castile and Leon is still eminently a cereal producer, from the point of view of agriculture, favorable developments in the wine industry in recent decades have placed the region in a privileged place within the Spanish wine context. The proliferation of wineries with both red and white wines, covered by a dozen of PDO local areas, is the clearest manifestation of this dynamism. Some of them, such as Ribera del Duero, Rueda, Toro and Bierzo are among the most prestigious at national level, with an increasing presence in foreign markets in a growing number of countries around the world. Their success in the global market are undoubtedly transcendental for rural development, given their deep territorial roots and their growing interaction with the rest of the local economy.

The paper ends with a set of final considerations regarding the strengths and weaknesses of the wine sector in Castile and Leon, and by extension in Spain, conditioning its future possibilities as an exponent of local development initiatives, in order to fix rural population in a region with a worrying high degree of population aging and a marked trend towards the demographic exodus of young people.