

# The winemaking sector in the province of La Rioja (Argentina): challenges, opportunities and policy guidelines in a context of structural heterogeneity

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## Abstract

Adopting a structuralist perspective, this study furnishes new empirical data on the configuration of one of the most important production sectors in the province of La Rioja (Argentina): the winemaking sector. It profiles the sector's stakeholders, identifies challenges and opportunities, and documents and classifies the support policies implemented over the last decade while suggesting avenues for improvement, given the need to strengthen companies, institutions and policies in a context of structural heterogeneity. The province's agricultural and climatic conditions, business capabilities and institutional history and strength, together with the market opportunities available, mean that the wine sector has the potential to enhance its productive and commercial position in both the domestic and the international market if it implements contextualized, far-reaching and segmented production policies.

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## Keywords

Viticulture, wine industry, productivity, regional economics, industrial development, industrial policy, industrial statistics, Argentina

## JEL classification

R11, O25, L66

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## I. Introduction

Since independence, the North-western region of Argentina, and particularly the province of La Rioja, has been its least developed region productively, economically and socially. When the port of Buenos Aires was established, the centrality of Pampas agriculture meant that north-western Argentina became a peripheral region in relation to the centre, and so was confronted with problems that still constrain its development and its role in the region and the world today. As part of Argentina's internal periphery, La Rioja is subject to a number of structural challenges, such as higher logistics costs, water scarcity, underdeveloped energy and telecommunications infrastructure and a limited capacity to produce and retain skilled human resources. The result has been a heterogeneous and poorly integrated business structure, characterized by a large informal sector and limited participation in national debates and policymaking (Economic Commission for Latin America and the Caribbean [ECLAC], 2021).

By studying the wine industry, one of the most important production sectors in La Rioja, this paper aims to contribute to the debate on industrial policy in a peripheral province and a sector that is characterized by intrasectoral heterogeneity and structural constraints, but that can also show examples of internationally oriented capacity-building in business methods and in technical and production practices (D'Alessandro et al., 2021, 2025; Gonzalo et al., 2022; Gonzalo et al., 2023; Pizarro Levi et al., 2022; Starobinsky et al., 2020). Employing a mixed methods approach that integrates multiple sources of information and dimensions of analysis, and adopting a structuralist conceptual perspective, the study provides new empirical data on the structural composition of the wine sector in La Rioja, characterizes its productive actors, and analyses and proposes lines of action for industrial policy.

Given the dearth of specific regional and sectoral data and analyses, the collection, systematization and estimation of data in this study represent a major contribution to the generation of new and systematized information on the La Rioja wine sector, providing a key resource to encourage academic problematization and one that should also prove useful for stakeholders in the sector and national and regional policymakers.

The study is structured as follows. The second section sets out the conceptual framework and the third describes the methodology used. The fourth section presents the production structure of La Rioja and the evolution of the wine sector. The fifth section analyses the current situation of the sector, its characteristics and those of its key stakeholders. The sixth section identifies the main challenges and opportunities, while the seventh analyses the promotional policies implemented during the period 2015–2024 and lays out recommendations for the future. Lastly, the eighth section presents some concluding remarks.

## II. Conceptual framework

Since its inception, Latin American structuralism has emphasized the pivotal role of centre-periphery dynamics and structures at both the global and regional levels (Prebisch, 1949, 1952; Rodríguez, 2006). Although this concept emerged decades ago within a specific historical and productive context, many of the processes analysed by structuralism remain relevant at the global, national and regional levels. Even now, well into the twenty-first century, concepts such as the internal periphery, duality and structural heterogeneity remain valid for the study of peripheral regions and the sectoral dynamics within them (Abeles et al., 2017; Bielschowsky, 2006; ECLAC, 2024; Gonzalo, 2023; Sztulwark, 2003; Torres and Ahumada, 2022).

According to this conception, the spatial distribution of port and transport infrastructure, and of production and commercial activities, is not uniform within the periphery, but is the result of historical processes shaped by peculiar geographical, economic, political, cultural, technological and environmental contexts (Furtado, 1959, 1966; Rodríguez, 2006). Thus, economic activities are concentrated like geological strata in certain regions, mainly in metropolitan areas, while the remaining regions lag behind as internal peripheries.

Consequently, some regions of the country's interior are more developed than others, with levels of productivity that vary within and between sectors and differing economic agents, capacities and institutions, giving rise to the well-known phenomenon of structural heterogeneity (Cimoli et al., 2005; Gonzalo, 2023; Mancini and Lavarello, 2013; Pinto, 1973, 1976; Pinto and Di Filippo, 1979). While central regions have a higher proportion of capital per person and high productivity comparable to that of developed economies, the internal peripheries are mainly home to traditional communities in which subsistence agriculture, low-productivity urban and service activities, limited mechanization and fixed capital are key features of economic life (Pinto, 1976, 1984). Although there may be sectors and firms that engage in technological innovation in these peripheries, such activities do not pervade the regional production structure as a whole (Bielschowsky, 2006; Cimoli et al., 2005; Pinto, 1976, 1989).

However, territorial configurations are not set in stone. While cumulative causation, the geological layers of productive accumulation and patterns of historical dependence weigh heavily, the territorial distribution of centres of accumulation within capitalism does change over time.<sup>1</sup> Accordingly, structuralism recognized right from the start that the State had a role to play as a promoter of growth and economic development through public policies aimed at consolidating and diversifying the production structure, fostering industrialization, modernizing agricultural technology practices and diversifying exports, among other things (Bielschowsky, 2006; Rodríguez, 2006; Rosales, 1988).

The problematization of industrial and productive development policy is particularly important in peripheral regions, as these face structural problems and locational disadvantages that can be addressed through public policies which recognize the regional dimension. Of particular relevance here are differentiated and context-specific policies aimed at generating far-reaching transformations in the production and social structure, since horizontal instruments do not take account of regional and sectoral structural heterogeneity (Abeles et al., 2017; Cassiolato and Lastres, 2005; ECLAC, 2024; Cimoli et al., 2009; Gonzalo, 2023; Gonzalo et al., in press; Mazzucato, 2023).

Setting out from a classic structuralist conceptual framework that reflects structural heterogeneity at the sectoral and regional levels and recognizes the importance of context-specific, far-reaching and segmented industrial policy, this paper will now analyse the wine sector in La Rioja.

### III. Methodology

A mixed methods approach was taken, as this provides flexibility in the analysis of qualitative and quantitative data from various sources, enables a comprehensive understanding of the subject under study to be arrived at, and lends greater validity to the results when it comes to formulating specific and context-appropriate recommendations (Vasilachis de Gialdino, 2006; Yin, 1984).

The quantitative approach involved estimation of updated indicators and a descriptive statistical analysis of data on crops, production, employment and marketing in La Rioja's wine sector.

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<sup>1</sup> An example of such a shift is the renewed centrality of Asia in the twenty-first century (Nayyar, 2013; Gonzalo, 2023).

Official statistics provided by the International Organization of Vine and Wine (OIV), the National Institute of Viticulture (INV), the Argentine Wine Observatory (OVA), International Wine and Spirits Record (IWSR), ProWein, the Economic Observatory of Wine Tourism of the Argentine Republic and provincial government bodies such as the General Directorate of Statistics and Censuses of La Rioja (DGEyCLR) and the Chilecito Chamber of Tourism were extensively compiled and processed. This information was supplemented by a database drawn from a survey of 113 wine producers in La Rioja, which forms part of a research project by the National University of Chilecito (UNdeC).<sup>2</sup>

The qualitative approach was based on an analysis of sectoral reports, institutional data and semi-structured interviews with key informants. Twenty-five interviews were conducted between 2022 and 2023, using question guides tailored specifically to each profile and serving to investigate sectoral and business characteristics and the main production and public policy challenges and problems faced. Informants were selected on the basis of the different production, business and institutional profiles that make up the La Rioja wine sector.<sup>3</sup> The information gathered was supplemented and collated with earlier business case studies (D'Alessandro et al., 2021, 2025; Gonzalo et al., 2023; Starobinsky et al., 2020).

Companies were also visited to carry out direct observation, and interviewees were contacted to validate information. The interviews were systematically transcribed and processed, and the information was classified by stakeholder type and category of analysis. Lastly, an exhaustive search of public policy instruments targeting the national and La Rioja wine sectors in the period 2015–2024 was conducted.

## IV. La Rioja and the development of winemaking

La Rioja accounts for 3.2% of the country's total land area and has a population of 383,865 (0.84% of the national total), most of whom live in the Capital and Chilecito departments (55.2% and 15.6%, respectively) (see map 1) (National Institute of Statistics and Censuses [INDEC], 2022). The province has a desert climate, characterized by intense solar radiation, seasonal rainfall and hot, dry winds. As regards water resources, there are valleys in the north-west that provide water for irrigation, while in the south-east water availability depends on rainfall (Secretariat of Agroindustry, 2019).

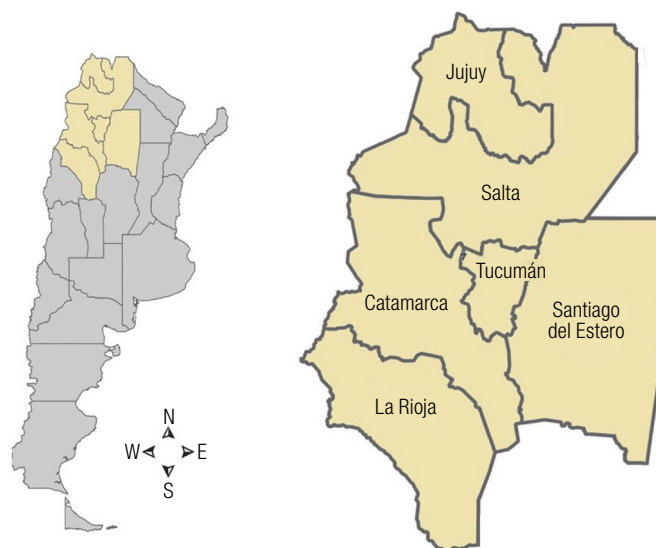
La Rioja accounts for about 0.6% of Argentina's gross value added (ECLAC and Argentine Ministry of Economy, 2022), and its social indicators lag behind the national average (ECLAC, 2021; Gonzalo and Starobinsky, 2023; Gonzalo et al., 2022; Niembro and Starobinsky, 2021, 2023; Starobinsky et al., 2020). For example, the province's household poverty rate was approximately 40% in the second half of 2023, almost 9 percentage points above the national average, while the average per capita household income was 68,717 Argentine pesos, well below the national average of 117,230 pesos (INDEC, 2023, 2024).

<sup>2</sup> The database of wine producers was obtained from the project "The role of the local innovation system in technological behaviour within the agro-industrial sector in the province of La Rioja", carried out in the framework of the Research and Development Projects of the Secretariat of Science and Technology (2018 call for proposals) at the National University of Chilecito.

<sup>3</sup> We interviewed 6 small, medium-sized and large winemakers, 10 managers and professional and technical staff from the administrative, financial, commercial and oenological departments of the province's leading wineries, 3 artisanal wine producers from the departments of Chilecito and Coronel Felipe Varela, 2 representatives of the La Rioja Chamber of Agricultural and Livestock Producers, 3 government officials from the Ministry of Labour, Employment and Industry of La Rioja and 1 representative of the Chilecito Chamber of Tourism.

**Map 1**

Argentina: geographical location of the North-western region and the province of La Rioja



**Source:** Prepared by the authors, on the basis of National Geographic Institute of Argentina. <https://www.ign.gob.ar/>.

As regards its production structure, the province presents a specialization profile based on low-technology exploitation of natural resources, mainly in the agricultural and livestock sector and the service sector. Olive, vine and walnut cultivation are to the fore in the agricultural sector and beef and goat farming in the livestock sector. Agricultural and livestock-based manufacturing is also significant, particularly within the olive agro-industrial chain (olive oil and preserved olives) and the vine sector (wine, must and grape juice). Meanwhile, important industrial manufacturing sectors include the textile and forestry sector (paper and cardboard) and the pharmaceutical sector (medicines), both of which were established in the province through industrial development programmes during the 1980s and 1990s. Production sectors that have emerged in recent years include renewable energy and cannabis for medicinal and industrial purposes (ECLAC, 2021; Gonzalo and Starobinsky, 2023).

The wine sector, for its part, has been relatively slow to establish itself compared to the situation in the provinces of Mendoza and San Juan, which by the nineteenth century already had technically developed wine industries integrated into both domestic and international commerce. In the twentieth century, railway-building and other public works projects, land allocation by the provincial government and lending for productive investment by the Bank of the Argentine Nation (BNA) led to an upsurge in activity. For example, there were incentives to expand the area given over to vine cultivation, while family wineries run by immigrants from Spain and Italy and local cooperatives with some level of technological and industrial capacity were established, boosting domestic commerce. The first forays into foreign markets also took place (ECLAC, 1985; Pizarro Levi et al., 2022).

By 1990, the implementing regulations for the project planning and funding provisions of the Industrial Promotion Act No. 22021 of 1979, covering tax relief and deferrals to encourage productive investment, spurred new investment by medium-sized and large wine producers in both established and new wine-growing regions. This led to the emergence of a dual wine sector comprising modern wineries with an international presence and traditional family-run or artisanal wineries focused on the local market (D'Alessandro et al., 2021, 2025; Gonzalo et al., 2023; Pizarro Levi et al., 2022; Starobinsky et al., 2020).

## V. The wine industry in La Rioja today

### 1. Crops, production and employment

In 2023, Argentina was the eighth-largest wine producer in the world and the second-largest in Latin America, with a production volume of 8.8 million hectolitres. It was also the world's tenth-largest exporter, with an export volume of 2 million hectolitres worth US\$ 667 million. Although more than half of global production was concentrated in France, Italy and Spain, Argentina's main regional competitor was Chile, the leading producer in Latin America and the world's fourth-largest exporter (International Organization of Vine and Wine [OIV], 2024).

Although Mendoza is the country's leading wine-producing and exporting province, the wine sector in La Rioja is also considerable. Its development has combined the geophysical conditions of its grape-growing valleys, a history and culture of viticulture dating back to the late sixteenth century and a productive, business and institutional fabric that has successfully integrated La Rioja's wine industry into twenty-first century global markets and adapted the sector to changing consumption and production trends (ECLAC, 2021; D'Alessandro et al., 2021, 2025; Gonzalo et al., 2023; Pizarro Levi et al., 2022; Starobinsky et al., 2020).

La Rioja was the country's third-largest wine-producing province (4.3%) in 2023, behind Mendoza and San Juan, which accounted for some 92% of output. Despite its small share of the national total, La Rioja's wine industry exhibits characteristics that reflect its relative strengths: an international presence (it accounts for 2.1% of Argentine wine exports by volume), organic production (it is the country's second-largest producing province) and extensive wine tourism. La Rioja is the leading grape- and wine-producing province in the North-western region of Argentina, accounting for around 97% of the region's organic grape output (see table 1).

**Table 1**  
Argentina (selected regions and provinces): main wine industry statistics, 2023

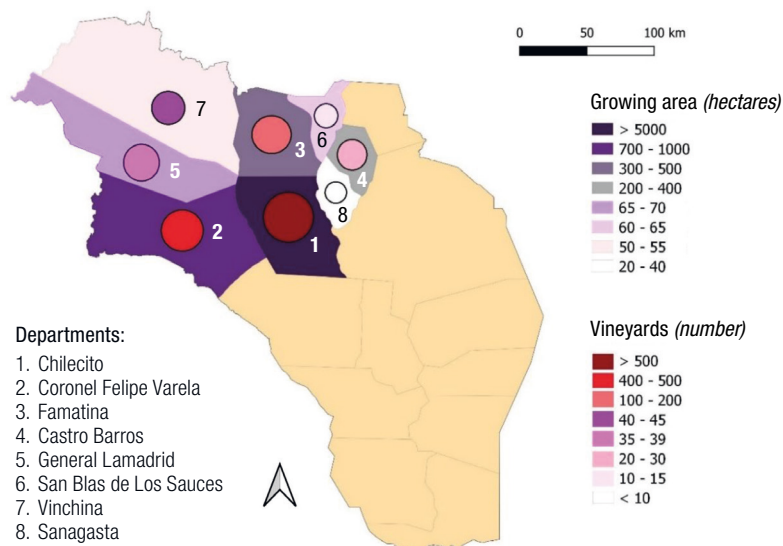
Variable	Argentina	Mendoza (Percentage of national total)	North-western region (Percentage of national total)	La Rioja (Percentage of national total)	La Rioja (Percentage of regional total)
Growing area (Hectares)	204 847	71.0	6.8	3.5	51.2
Grape production (Quintals)	1 455 312	64.2	6.7	4.2	66.9
Organic grape production (Quintals)	564 966	60.8	22.1	21.4	96.9
Wine production (Hectolitres)	8 813 048	73.9	7.3	4.3	58.7
Wineries <sup>a</sup> (Number)	885	70.1	10.4	2.0	19.6
Wineries open to tourists <sup>a</sup> (Number)	357	48.7	24.9	4.2	17.2
Exports (Dollars)	685 984 000	93.1	3.1	1.2	32.4
Exports (Litres)	196 611 417	91.3	2.9	2.1	47.1

**Source:** Prepared by the authors, on the basis of data from the National Institute of Vitiviniculture (INV), the Argentine Wine Observatory (OVA) and the Enotourism Observatory.

<sup>a</sup> Data are from 2022.

Within the province of La Rioja, primary production takes place in eight departments in the producing valleys of Famatina and Bermejo and in the wine-growing areas of Chañarmuyo, Castro Barros and Sanagasta (see map 2). With regard to vineyard size (1,179 vineyards covering 7,180 hectares in 2023), smallholdings and small farms (up to 10 hectares) predominate, accounting for 85%. Medium-sized holdings (between 11 and 50 hectares) and large holdings (over 50 hectares) account for 12% and 3% of the total, respectively (National Institute of Vitiviniculture, 2024b).

**Map 2**  
La Rioja (Argentina): geography and wine production, 2023



**Source:** Prepared by the authors, on the basis of National Institute of Vitiviniculture (2024). Informe anual de superficie 2023.

**Note:** Georeferenced location.

Of the 7,180 hectares, 82% are planted with grape varieties suitable for the production of wine, must and grape juice, while the remainder is used for the production of raisins and table grapes. As is the case nationally, the majority of winemaking grape varieties are red (54%), mainly Malbec (26%), followed by white varieties (37%), mostly Torrontés Riojano (83%), although the Chardonnay variety becomes more prevalent as vineyard size increases. Rosé varieties, meanwhile, account for only 9% of the total area under cultivation. It is worth noting that 87% of the area devoted to vine cultivation is planted with varieties of high oenological quality. The department of Chilecito is the main producing location, accounting for 78% of the area under vine, around 80% of the cultivation of high oenological quality varieties, 99% of the province's organic grape output and 80% of medium-sized and large vineyards. Over the last five years, the province's annual grape production has averaged 65,428 tons, of which over 90% has been used for winemaking, with average production of 382,166 hectolitres.

The wine industry in La Rioja also has significant socioeconomic impacts (see table 2). The sector represents an estimated direct contribution of around 13% of total gross value added and employs approximately 9% of formal private sector workers.<sup>4</sup> Then there are the dynamics of the sector, whose indirect effects generate positive externalities not only locally but regionwide, such as the hiring of seasonal workers from other provinces in the North-western region during the grape harvest (Directorate-General for Sectoral and Special Programmes and Projects, 2023).

Despite all this, La Rioja occupies a peripheral position compared to Mendoza's central role in Argentina's wine industry. The centre-periphery relationships between La Rioja and Mendoza are evident in several aspects, such as the selling of La Rioja wine with Mendoza labels, the integration of La Rioja wineries under the coordination and ownership of Mendoza wineries, and the need to bottle in Mendoza and to draw on the oenological expertise and services of that province (D'Alessandro et al., 2021, 2025; Gonzalo et al., 2023; Pizarro Levi et al., 2022; Starobinsky et al., 2020).

<sup>4</sup> Estimates based on information from DGEyCLR. Wine production was calculated from the percentage of grapes used for winemaking in 2021 (latest available data), and the annual labour input of primary sector employees was estimated at an average of 80 working days per hectare per year on the basis of information provided by the producers interviewed.

**Table 2**  
La Rioja (Argentina): economic contribution of the wine sector, 2023

Variable	Share of provincial total and number
Gross value added	13%
Registered private sector employment	8.7%
Exports	6%
Industrial establishments <sup>a</sup>	20%
Main sectoral support institutions	15 <sup>b</sup>

**Source:** Prepared by the authors, on the basis of National Institute of Vitiviniculture (INV) and General Directorate of Statistics and Census of La Rioja (DGEyCLR).

<sup>a</sup> As a proportion of all companies and organizations in the La Rioja manufacturing sector in 2021.

<sup>b</sup> National Institute of Vitiviniculture (INV), National Institute of Agricultural Technology (INTA), National Institute of Industrial Technology (INTI), Federal Council of Investments (CFI), National University of Chilecito, Government of the Province of La Rioja, Argentine Wine Corporation (COVIAR), Wineries of Argentina, Federation of Wine and Related Industry Workers and Employees, La Rioja Chamber of Wineries, La Rioja Chamber of Agricultural and Livestock Producers and Regional Consortiums for Agricultural Experimentation (CREA Groups), among others.

## 2. Commercialization and markets

Winemaking in La Rioja is characterized by the production and commercialization of various types and styles of wine, ranging from table wines to fine wines and sparkling wines, and to a lesser extent of grape must and grape juice. In 2023, wine production was dominated by regional red wines (51% of the total), which is consistent with the intensive cultivation of red grape varieties of high oenological quality, particularly Malbec (INV, 2024a). As is the case nationally, 75% of total output by volume goes to the domestic market. Sales over the last five years have averaged 168,962.5 hectolitres, although in the post-pandemic context of 2021 they peaked at 188,997 hectolitres (Argentine Wine Observatory [OVA], 2024).

La Rioja accounts for about 2.5% of domestic shipments in Argentina.<sup>5</sup> Its sales present certain peculiarities, such as the predominance of regional wine sold in Tetra Paks (52%), a product that is considerable in volume terms but has a very low commercial value compared to regional wine sold in glass bottles. Although special and sparkling wines with a greater commercial value are produced in the province, their share of sales is still below 1% (OVA, 2024).

Trade flows also include the interprovincial transport of bulk wine. The volume entering La Rioja, mainly from the province of Mendoza (90%), is barely more than a seventh of that shipped from La Rioja, primarily to Mendoza (60%) and San Juan (27%). This dynamic involves a large outflow of wines whose value added and commercial value are low and whose processing is completed mainly in the provinces of the Cuyo region (INV, 2023).

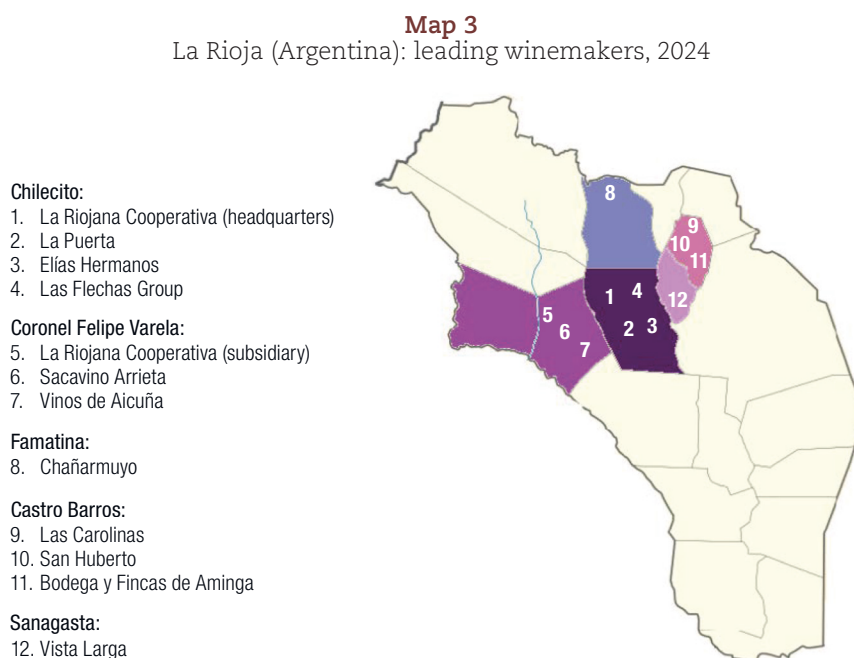
In 2023, Argentine exports registered a significant decline of 25% in volume and 16% in value. La Rioja shared in this downward movement, although the decline in value was steeper, with volume down 25% and value 24%. The province thus forfeited approximately US\$ 8 million and 4.2 million litres of exports that would mainly have gone to countries such as the United Kingdom, the United States, Sweden, Denmark and China. Although the market share of white wines has been growing, it is still below that of red wines. The main type of wine exported is varietal wine in glass bottles (59%) at an average price of US\$ 2.60 per litre. The remainder is exported in bulk (64% white wine) at an average price of US\$ 0.72 per litre (OVA, 2024).

<sup>5</sup> In analysing domestic sales, INV only includes direct purchases in shops.

### 3. The heterogeneity of producers

Wine is produced and processed industrially in five departments of La Rioja: Chilecito and Famatina (Famatina Valley), Coronel Felipe Varela (Bermejo Valley), Castro Barros (La Rioja Coast) and Sanagasta (Capital Region) (see map 3).

The La Rioja wine sector comprises a range of producers, as presented below.



**Source:** Prepared by the authors, on the basis of National Geographic Institute of Argentina. <https://www.ign.gov.ar/>.

The leading winemaker is La Riojana Cooperativa, which applies a cooperative model of production and commercialization. With over eight decades' experience, it is the leading player in La Rioja's wine industry, bringing together a third of local wine producers as members and commanding the output of over 4,000 hectares, 45% of the province's wine production and more than 70% of its wine exports. It has a production capacity of around 30 million litres and produces various types of wine (classic, organic, vegan and biodynamic), both high-end and low-end (ranging from regional wines in Tetra Pak cartons to high-quality bottled wines), as well as other products (must and juice). It has also made considerable efforts in the area of organic production and certification.

Its distinguishing feature is its system for providing primary producers with inputs and advice. The Agricultural Department purchases inputs (seedlings, fertilizers and tools) from suppliers elsewhere in Argentina (Mendoza, Córdoba and Buenos Aires) and abroad, delivers them to members and deducts the cost from the value of their harvest, as contractually stipulated. It also provides technical advice to its membership of mainly smallholders and small-scale producers.

It comprises more than 300 diverse producers, so that the raw material it receives (which is added to the output of its own vineyards) varies in quality and is sorted to produce the different ranges of wines, musts and juices. Although the Malbec, Cabernet and Syrah red grape varieties are important, the prevalence of small producers growing the Torrontés Riojano variety explains the dominance of that grape and the winery's pioneering innovation efforts to position it in the market, for example by developing ecotypic yeast, organic and biodynamic wines and new products.

La Riojana Cooperativa operates primarily in the domestic market for bottled and boxed wine, although it also acts as a wholesaler, selling in bulk to wineries in other provinces, and enters into processing agreements with local producers. In the export market, it has entered into strategic partnerships (like the venture it has formed with a Swedish company) and obtained international trade standards certification based on the standards of Fairtrade International (a system focused primarily on the development of small producers) and other international quality certifications. It also exports to European markets such as the United Kingdom and Sweden.

Next after La Riojana Cooperativa come medium-sized wineries such as Valle de La Puerta S. A., Bodega Chañarmuyo S. A., Bodegas San Huberto S. A. and Bodega Elías Hermanos S. A., all privately run, and Bodega y Fincas de Aminga S. R. L., which is run by the provincial government. These are relatively young Argentine-owned companies (established since 1990) that produce wines of different types (classic, organic and vegan) and grades (regional wines, wines in bottles and demijohns, and fine bottled wines).

These wineries employ integrated production models: mechanized vineyards of between 50 and 220 hectares planted mainly with red grape varieties such as Malbec and Douce noir, industrial facilities with an average production capacity of 3.5 million litres and state-of-the-art European equipment and technology. They source their raw material from their own vineyards and also purchase grapes from third parties, selecting them by variety and quality. They also source supplies from various provinces in Argentina (Mendoza, Córdoba, Santa Fe and Buenos Aires).

Other characteristics of these wineries include their strong links with Mendoza (ownership, consultancy, technical and professional resources), their location in relatively new wine-growing areas at high altitudes (over 1,400 metres above sea level ) such as Chañarmuyo and Aminga and their focus on innovation as producers of fine, exclusive and high-end wines, as in the cases of Valle de La Puerta S. A., Bodegas San Huberto S. A. and Bodega Chañarmuyo S. A.

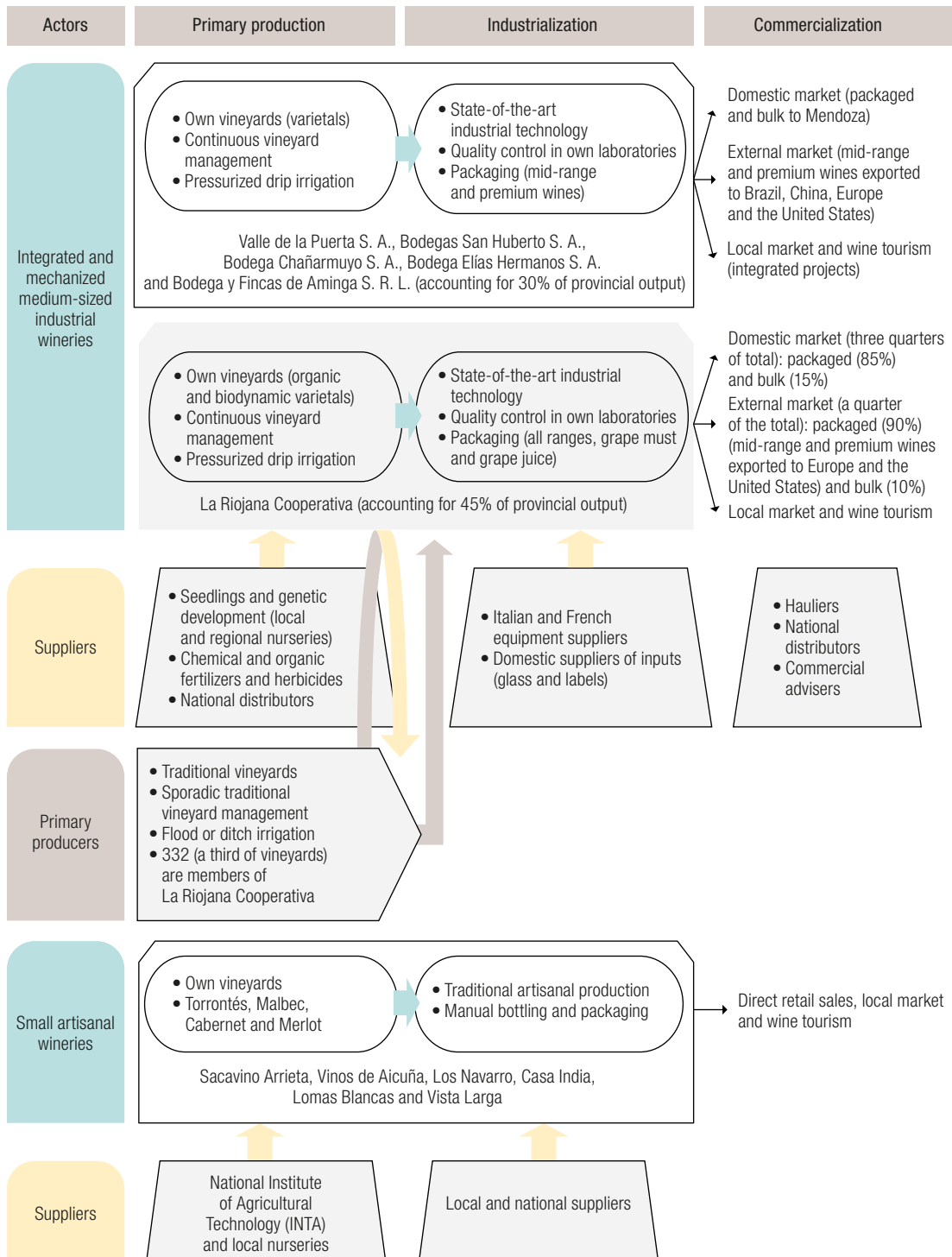
They have dedicated commercialization, sales and marketing departments and commercial and logistics systems comprising networks of hauliers and distributors in different provinces. Some companies such as Bodegas San Huberto S. A. and Bodega Elías Hermanos S. A. are primarily engaged in the commercialization of wines packaged for retail, while others such as Bodega Chañarmuyo S. A. and Valle de La Puerta S. A. focus mainly on providing winemaking services for Mendoza-labelled wines, although they also produce organic wines.

They have forged ties with strategic partners and importers in various countries, including China, the United States and South American nations, and have made successful forays into wine-producing countries such as Australia and South Africa. While each company has its own market presence, on average they export 30% by volume of their total sales of packaged wines. As for wine tourism, they offer more sophisticated activities such as guided tours, dining experiences in their own restaurants and accommodation services.

Thirdly, there are small, family-run wineries producing artisanal wines, such as Bodega Sacavino Arrieta, Vinos de Aicuña, Casa India, Los Navarro and Lomas Blancas. They are mainly located in the Bermejo Valley area, and their history dates back to the twentieth century. Although they have redesigned their production processes to produce red, organic and exclusive wines, they use raw material from their own vineyards, which is of lower oenological quality. They have older, Argentine-manufactured equipment and carry out their production activities to lower process control standards. Given their relatively rudimentary vineyard management practices, they source inputs from local suppliers (small nurseries, provincial suppliers or artisanal producers) or public organizations, such as the National Institute of Agricultural Technology (INTA), which also provides technical assistance.

Furthermore, they have few sales outlets, are focused on the local market and rely heavily on wine tourism activities, such as guided tours, wine museums and cultural and gastronomic experiences organized by the municipal or provincial authorities (see diagram 1).

**Diagram 1**  
La Rioja (Argentina): overview of the wine sector



Source: Prepared by the authors.

## VI. Challenges and opportunities for the sector's development

La Rioja and its wine sector face a number of structural socioeconomic problems resulting from their peripheral location relative to the port of Buenos Aires and the country's central region, certain natural factors such as water scarcity, high transport costs which result in greater input and commercialization costs, high electricity costs and limited availability of staff with professional, technical and even manual training. This is compounded by intrasectoral heterogeneity in respect of production, capitalization and capacity-building in the areas of science and technology, innovation and management.

At the primary level, smallholders and small-scale producers often face the challenge of restructuring and modernizing. Although many of these producers survive thanks to the cooperative system operated by La Riojana Cooperativa, capitalization and the development of various management skills are priority challenges. The main challenge facing medium-sized and large producers, which have made efforts to modernize and invest in technology and production, is to reduce production costs, particularly as regards electricity consumption for groundwater extraction.

As regards stakeholders in the industrial and commercial segments of the value chain, family-run and artisanal wineries face the challenge of improving production quality and commercialization channels. Medium-sized wineries and La Riojana Cooperativa, for their part, need to generate greater value added for the wine sold in interprovincial bulk markets and increase their presence in new export markets if they are to consolidate their growth and expand. In particular, La Riojana Cooperativa needs to modernize its production and packaging lines. Reducing structural costs and facilitating technology transfer between the region's stakeholders are becoming priority challenges. The development of wine tourism is also a shared challenge for all stakeholders (see table 3).

The history of the wine sector in La Rioja and its entry into and growing presence on international markets reflect well on the capabilities and efforts of the province's businesses and support institutions, which have helped producers take advantage of domestic and international market opportunities. Specific opportunities have opened up in the current context, examples being organic production, sustainable practices, the exploration of new wine styles (low-alcohol or alcohol-free and premium wines), the revitalization of traditional viticulture and the promotion of wine tourism. The growth of Asian markets can also be capitalized upon.

Global trends have been shifting towards a greater emphasis on territorial and cultural aspects and sustainable production. Where the latter is concerned, at a local level the sector has demonstrated its capacity to produce organic, vegan and biodynamic grapes and wines, and it is covered by protected geographical indications and designations of origin. The industry's waste management capabilities are another strong point. The market's increased demand for quality and safety also aligns with the ability of businesses to obtain a wide range of certifications for production, organizational and commercial processes (D'Alessandro et al., 2021, 2025; Gonzalo et al., 2023; Pizarro Levi et al., 2022; Starobinsky et al., 2020). Lastly, bulk sales to less sophisticated markets or to third-party producers can complement more diversified and value added strategies.

**Table 3**  
La Rioja (Argentina): main challenges in the wine sector, by producer type

Primary production	
Smallholders and small-scale producers	<ul style="list-style-type: none"> <li>• Capitalization and higher returns</li> <li>• Training in production, financial, technological and commercial management</li> <li>• Adoption of modern techniques and efficient use of scarce water resources</li> <li>• Conversion to grape varieties of higher oenological quality</li> <li>• Exploitation of the Torrontés Riojano grape variety</li> <li>• Generational change among wine producers</li> <li>• Productive investment in modernization of farming practices and vineyard management</li> </ul>
Medium-sized and large producers	<ul style="list-style-type: none"> <li>• Reduction of production costs</li> <li>• Investment in irrigation and groundwater extraction systems to improve their efficiency</li> <li>• Capacity-building to advance the energy transition</li> <li>• Greater collaboration with scientific and technological institutions</li> </ul>
Industrialization and commercialization	
Family or artisanal wineries	<ul style="list-style-type: none"> <li>• Investment in higher-quality machinery and barrels</li> <li>• Improvement and expansion of sales channels</li> <li>• Certification of quality, production and commercial standards</li> <li>• All-round development of wine tourism</li> </ul>
Medium-sized wineries and La Riojana Cooperativa	<ul style="list-style-type: none"> <li>• Investment in new production and packaging lines in line with international trends</li> <li>• Expansion of sales of bottled wine, particularly high-end wines with greater market value</li> <li>• Entry into new international markets</li> <li>• Reduction in structural costs</li> <li>• Promotion of technology transfer between stakeholders in the innovation system to increase value added and product diversification</li> <li>• All-round development of wine tourism</li> </ul>

**Source:** Prepared by the authors, on the basis of information from interviews with winemakers, winery managers and public officials in the province of La Rioja; National Institute of Vitiviniculture (2023). *Relevamiento vitivinícola argentino: parte II, contexto industrial de la vitivinicultura*; Argentine Wine Observatory (2024). *Estadísticas: reportes interactivos*. <https://www.observatorioriova.com/category/reportes-interactivos/>; Gonzalo, M., D'Alessandro, M. and Yañez Mayorga, B. (2023). Bodega Chañarmuyo: vinos de alta gama y enoturismo desde la periferia riojana. *Revista Actualidad Económica*, 33(111), 19–33; Pizarro Levi, E., D'Alessandro, M., Filipetto, S., Starobinsky, G. and Gonzalo, M. (2022). Trayectoria socioproductiva, estructura empresarial, tendencias y desafíos del Torrontés Riojano. *Revista Rivar*, 9(25), 191–210; D'Alessandro, M., Gonzalo, M., Filipetto, S. and Starobinsky, G. (2021). Valle de La Puerta: recursos, capacidades y vínculos para la internacionalización empresarial desde Chilecito, La Rioja, Argentina. *Revista Pymes, Innovación y Desarrollo*, 9(3), 3–25; D'Alessandro, M., Gonzalo, M., Starobinsky, G. and Yañez, B. (2025). Bodegas San Huberto: integración productiva de recursos y capacidades en la periferia argentina, 1998–2023. *Revista Rivar*, 12(35), 214–233; Starobinsky, G., Gonzalo, M., Filipetto, S. and D'Alessandro, M. (2020). Dinámica de mercados y esfuerzos tecnológicos en un sistema de innovación periférico: la riojana cooperativa vitivinifrutícola. *Revista Rivar*, 7(20), 67–87.

## VII. Policies: progress, limitations and guidelines for the future

A number of productive, industrial and business promotion instruments, some general in nature and others specifically for the wine sector, have been implemented over the last decade in accordance with the production guidelines established by national governments. We have studied the general scope<sup>6</sup> of these instruments in the province's wine sector by systematically compiling information on the main sectoral support instruments and conducting fieldwork involving in-depth interviews.

Nationally, certain institutions such as the Federal Council of Investments (CFI), the Bank of the Argentine Nation (BNA), the Investment and Foreign Trade Bank (BICE) and ministries working with agro-industry have implemented arrangements (generally credit lines) to fund technological and productive investment, working capital and international quality certifications for processes and

<sup>6</sup> It should be noted that this section does not conduct a detailed study of the impact of public policies targeting the wine sector in the province of La Rioja, but presents the instruments identified and analyses them collectively in a general and contextualized way on the basis of the qualitative and quantitative information detailed in the methodology.

products, while carrying out international trade promotion work. In the province, State bodies such as the La Rioja Public Guarantee Fund (FOGAPLAR) and Banco Rioja, supported by the Ministry of Production and Environment and the Ministry of Labour, Employment, Industry and Mining, make loans at subsidized rates for technological upgrading and modernization, working capital and the transition to renewable energy and efficient irrigation, albeit on a small scale.

Initiatives that address other types of needs are also being implemented, examples being online training courses covering various viticulture-related topics (marketing, international trade, financial organization and management and wine tourism), delivered by INV. There are also undergraduate and postgraduate courses in oenology, tourism and agronomy, UNdeC internship programmes and research projects, and the food safety, food quality and biotechnology services provided by the National University of La Rioja (UNLaR) and UNdeC (see table 4).

**Table 4**

La Rioja (Argentina): national and provincial policies for the wine industry, 2015–2024

Type of instrument or financing	National	Provincial
Capital investments	<ul style="list-style-type: none"> <li>Financing for wine producers (2015, Bank of the Argentine Nation (BNA))</li> <li>Microcredits for wine producers (2017, BNA)</li> <li>Business development loans (2021, Federal Council of Investments (CFI), Argentine Wine Corporation (COVIAR) and provincial governments)</li> </ul>	<ul style="list-style-type: none"> <li>Financing for small and medium-sized enterprises in La Rioja (2020, Ministry of Productive Development of Argentina, Government of La Rioja)</li> <li>Non-refundable contributions to the Integrated Wine System (2021, La iojana Cooperativa, COVIAR, national Ministry of Productive Development)</li> </ul>
Working capital	<ul style="list-style-type: none"> <li>Credits for transport and harvesting (2023 and 2024, BNA)</li> <li>Credits for working capital (2023, Banco Ciudad de Buenos Aires, Wineries of Argentina)</li> </ul>	<ul style="list-style-type: none"> <li>2022 Harvest Credit (2022, BNA, Government of La Rioja)</li> <li>Irrigation and Water Efficiency Programme (2022, Government of La Rioja, CFI, La Rioja Public Guarantee Fund (FOGAPLAR))</li> <li>Distributed generation of renewable (solar) energy (2022, Government of La Rioja, CFI and FOGAPLAR)</li> </ul>
Training	<ul style="list-style-type: none"> <li>International Argentine wine industry negotiations (2016, COVIAR)</li> <li>Enhancement of sustainability in the Argentine wine sector (2022, National Institute of Vitiviniculture (INV), National Institute of Industrial Technology (INTI), CFI)</li> </ul>	<ul style="list-style-type: none"> <li>Wine Tourism in La Rioja (2023, Government of La Rioja, COVIAR, national Ministry of Tourism and Sport)</li> </ul>
Technological innovation	<ul style="list-style-type: none"> <li>Support Programme for Small-Scale Wine Producers in Argentina (PROVIAR II) (2023, Ministry of Agriculture, Livestock and Fisheries, INV, Inter-American Development Bank)</li> <li>Financing for water efficiency (2024, Ministry of Economic Affairs, Investment and Foreign Trade Bank (BICE))</li> <li>Leasing for the acquisition of agricultural machinery (2024, Ministry of Economic Affairs, BICE)</li> </ul>	<ul style="list-style-type: none"> <li>Credits to improve productivity (FOGAPLAR)</li> </ul>
Standards certification	<ul style="list-style-type: none"> <li>Funding and support for the Sustainable Argentine Viticulture label (2024, COVIAR, CFI, provincial governments)</li> </ul>	
Marketing	<ul style="list-style-type: none"> <li>“Opening markets” programme (2017, national Ministry of Agro-industry)</li> <li>Argentine Wine National Drink (2018, national Ministry of Agro-industry, COVIAR)</li> <li>Plan 1000 for the Winemaking Value Chain (2021, national Ministry of Productive Development)</li> <li>“Reverse export missions” bringing potential buyers to the province (2022–2023, CFI, COVIAR)</li> <li>Export promotion credits (2023, Banco Ciudad de Buenos Aires, Wineries of Argentina)</li> </ul>	
Wine tourism	<ul style="list-style-type: none"> <li>Wine Tourism Development Fund (2023, Ministry of Economic Affairs, COVIAR, BICE trust funds)</li> </ul>	<ul style="list-style-type: none"> <li>La Rioja Torrontés Route (2018, Government of La Rioja, Ministry of Agro-industry, COVIAR)</li> </ul>

**Source:** Prepared by the authors, on the basis of official publications of the organizations concerned.

Despite the different national and provincial tools and initiatives mentioned, the fieldwork revealed a number of factors that limit the availability and reach of national credit lines and non-repayable grants for the wine sector in the province. They include in particular a lack of publicity and limited awareness of these schemes, competitive disadvantages compared to larger, higher-capacity enterprises and producers (particularly in the province of Mendoza) and a failure to consider the structural problems of La Rioja.

It also became apparent that most smallholders and small-scale producers were excluded from public policy, and that medium-sized and large producers faced competitive disadvantages due to their location. Although provincial policies are better adapted to local needs and are implemented more promptly, as well as being more widely publicized among local producers, they are insufficient in their scope and funding levels. Furthermore, some instruments overlap and there is little coordination between the institutions that manage them. All this is compounded by issues associated with macroeconomic instability and uncertainty at the national level.

Problems with the scope of productive development policies in the province stem from shortcomings in their design, implementation and impact assessment and from the need to adapt policy instruments to sectoral and regional peculiarities. General recommendations for the design of public policies in the sector, with a view to their reaching a larger number of producers, achieving greater impact in a peripheral context and so reducing intrasectoral heterogeneity and duality, are presented below (see table 5).

**Table 5**  
Differentiated needs, objectives and policy guidelines for the productive development of the La Rioja wine sector

	Need or objective	Policy guidelines
Cross-cutting aspects	<ul style="list-style-type: none"> <li>• Achieve water efficiency</li> <li>• Reduce energy costs</li> <li>• Improve biotechnology aspects</li> <li>• Ensure process sustainability</li> <li>• Promote national and international market participation</li> </ul>	<ul style="list-style-type: none"> <li>• Promotion and funding of investment in provincial water infrastructure projects and modernization of irrigation systems</li> <li>• Promotion and funding of investment in renewable energy development</li> <li>• Promotion and funding of research and development in areas relating to plant genetics, bio-inputs and propagation techniques</li> <li>• Funding and grants for organic production</li> <li>• Funding for business intelligence systems</li> </ul>
Smallholders and small-scale producers	<ul style="list-style-type: none"> <li>• Improve productivity, yields and wine quality</li> <li>• Increase profitability</li> <li>• Carry out variety conversion</li> </ul>	<ul style="list-style-type: none"> <li>• Technical assistance and training to improve production capabilities and vineyard management</li> <li>• Funding and tax differentiation for the supply of inputs</li> <li>• Long-term financing for productive restructuring</li> </ul>
Medium-sized and large producers and wineries	<ul style="list-style-type: none"> <li>• Increase production capacity</li> <li>• Enhance genuine competitiveness by producing differentiated, higher-quality products</li> <li>• Move into the production of high-end wines with greater value added</li> <li>• Respond to new consumption trends</li> <li>• Expand domestic and international sales channels</li> <li>• Improve marketing and publicization strategies</li> </ul>	<ul style="list-style-type: none"> <li>• Technical and financial support for quality improvements, product differentiation and measures to increase value added</li> <li>• Encouragement and medium-term funding for technological modernization and innovation</li> <li>• Financial and technical support for the development of marketing strategies and expansion into foreign markets</li> <li>• National and provincial management of specific international trade agreements</li> <li>• Differentiated incentives to strengthen and develop local suppliers</li> <li>• Financial or fiscal support for wine tourism projects and ventures</li> <li>• National and international marketing and promotional campaigns</li> </ul>

**Source:** Prepared by the authors.

To begin with, there are cross-cutting needs requiring larger-scale interventions, coordination between the national and subnational levels and institutional commitment. Meeting these needs would impact the competitiveness of the wine sector and other sectors of La Rioja's production structure. Four key areas for action are:

- (i) Investment in water and energy infrastructure.
- (ii) Funding for research and development programmes and teams, and extension services in areas relating to biotechnology, improvement techniques, organic farming and variety conversion.
- (iii) Funding for business intelligence systems based on global trends in food production and consumption.
- (iv) Progress with information technology systems for collecting, processing and monitoring data on the province's wine sector so that policy can be based on accurate, up-to-date information.

At the same time, there are differentiated needs that reflect the diversity of business stakeholders:

- Smallholdings and small-scale producers seek to improve the oenological quality of their raw material and thereby increase yields and incomes. This requires the implementation of technical assistance and extension initiatives and tools, together with provision of and access to better inputs and affordable, low-cost financing to enable them to restructure and to introduce new varieties.
- Medium-sized and large producers and wineries need to enhance their competitiveness so that they can increase the value added, differentiation and quality of their products, while scaling up production and commercialization with a view to expanding more strongly into domestic and foreign markets. Technical support instruments, funding for innovation and scaled-up production, specific trade policies and more comprehensive tools for promoting and positioning La Rioja's wine industry in Argentina and abroad are needed to underpin these efforts.

## VIII. Final considerations

This paper has conducted a structural analysis to bring out the special features of the La Rioja wine sector, which has succeeded in consolidating local business capabilities that enable it to operate on a regional and international scale despite the heterogeneity and duality of its firms and production characteristics. The paper has also described the challenges and opportunities for the sector and sought to portray, analyse and problematize La Rioja's wine industry, operating as it does in a peripheral region that carries less weight domestically and internationally than Mendoza or Cuyo. Conceptually, structural heterogeneity largely reflects the configuration of the province's wine industry, in which actors with cutting-edge technology, international reach and access to sophisticated markets exist alongside artisanal wineries with seasonal sales and with very limited innovation capacity or national and international reach.

Nevertheless, La Rioja's agricultural and climatic conditions, business capabilities, institutional history and strength and sectoral support policies mean that the province's wine industry has the potential to expand its reach and improve its productive and commercial position. New consumer and market trends in Argentina and internationally (organic production, designations of origin, wine tourism, fresh wines and grapes of high oenological quality), the growth of the Asian market and collaboration with wineries in other provinces and regions offer clear opportunities for the sector's future.

If these opportunities are to be capitalized upon, productive development policies that reflect the region's challenges and the diversity of stakeholders are needed to overcome current constraints. Thus, designing instruments that are tailored to the sector's capabilities, challenges and opportunities means taking account of the structural and cross-cutting issues affecting this peripheral province and of the inter- and intrasectoral heterogeneity of the wine industry. According to structuralist thinking, the impact of support policies can be increased via greater contextualization, targeting, outreach to various types of producers and linkages.

Adopting policies that promote and support medium-sized and large wineries in their efforts to increase production and commercialization of higher-quality wines, value added and differentiation in new markets, while also aiming to improve the oenological quality and technical production practices of small producers, would have the greatest impact at the provincial level. However, each specific sectoral policy requires further study. Additionally, each instrument needs to be analysed in detail to identify any potential design or implementation shortcomings that may limit the impact of policies in the province.

Consideration should also be given to the potential for complementing and integrating the wine industries of Mendoza and La Rioja, as various wineries and producers in the two provinces have established formal and informal relationships and, in some cases, have achieved full or partial vertical integration. Furthermore, new ventures involving businesses and capital from Mendoza and other provinces have appeared in La Rioja. Although part of this topic has been addressed in the present paper, it will be studied in greater detail in future research.

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