



UNITED KINGDOM
IRELAND
UNITED ARAB EMIRATES
INDIA

PRESENTING TO:

Export Committee July 2023

CONTACT:

Damien Jackman and Justine McGovern

AGENDA

MARKET UPDATES & STRATEGY

- Mature Markets: United Kingdom and Ireland
- Emerging Markets: United Arab Emirates and India

FY2023-2024 PLANS – YOUR OPPORTUNITY

- In-market activity including Kickstarter; and
- Export Member opportunities

CALIFORNIA WINES

MARKET COMPARISONS

	UNITED KINGDOM	IRELAND	UNITED ARAB EMIRATES	INDIA
DEMAND (Consumption)				
Volume (9L Cases)	132 Million	8.7 Million	1.5 Million	2 Million
Value (USD)	\$18 Billion	\$1.5 Billion	\$200 Million	\$250 Million
Avg Price Per Bottle (USD)	\$11.67	\$14.71	\$11.62	\$15.49
Vol share premium wine	24.30%	50.30%	15.70%	3.70%
MARKET CHARACTERISTICS				
Population (0-79 years)	64 Million	5 Million	10 Million	1.3 Billion
– Percentage 20-39	27.70%	26.40%	53.80%	33.30%
– Percentage 40-59	27.60%	28.50%	24.40%	21.80%
– Percentage 60-79	20.40%	17.00%	3.00%	9.20%
GDP per capita (USD)	\$42,236	\$90,478	\$130,745	\$2,031

MARKET COMPARISONS

	UNITED KINGDOM	IRELAND	UNITED ARAB EMIRATES	INDIA
DEMAND (Consumption)				
Volume (9L Cases)	132 Million	8.7 Million	1.5 Million	2 Million
Short term growth	-1.30%	-3.50%	16.60%	31.90%
2025 Volume (9L Cases) Projection	124 Million	7.2 Million	2.5 Million	7.5 Million
2030 Volume (9L Cases) Projection	116 Million	6.1 Million	5.3 Million	29.8 Million

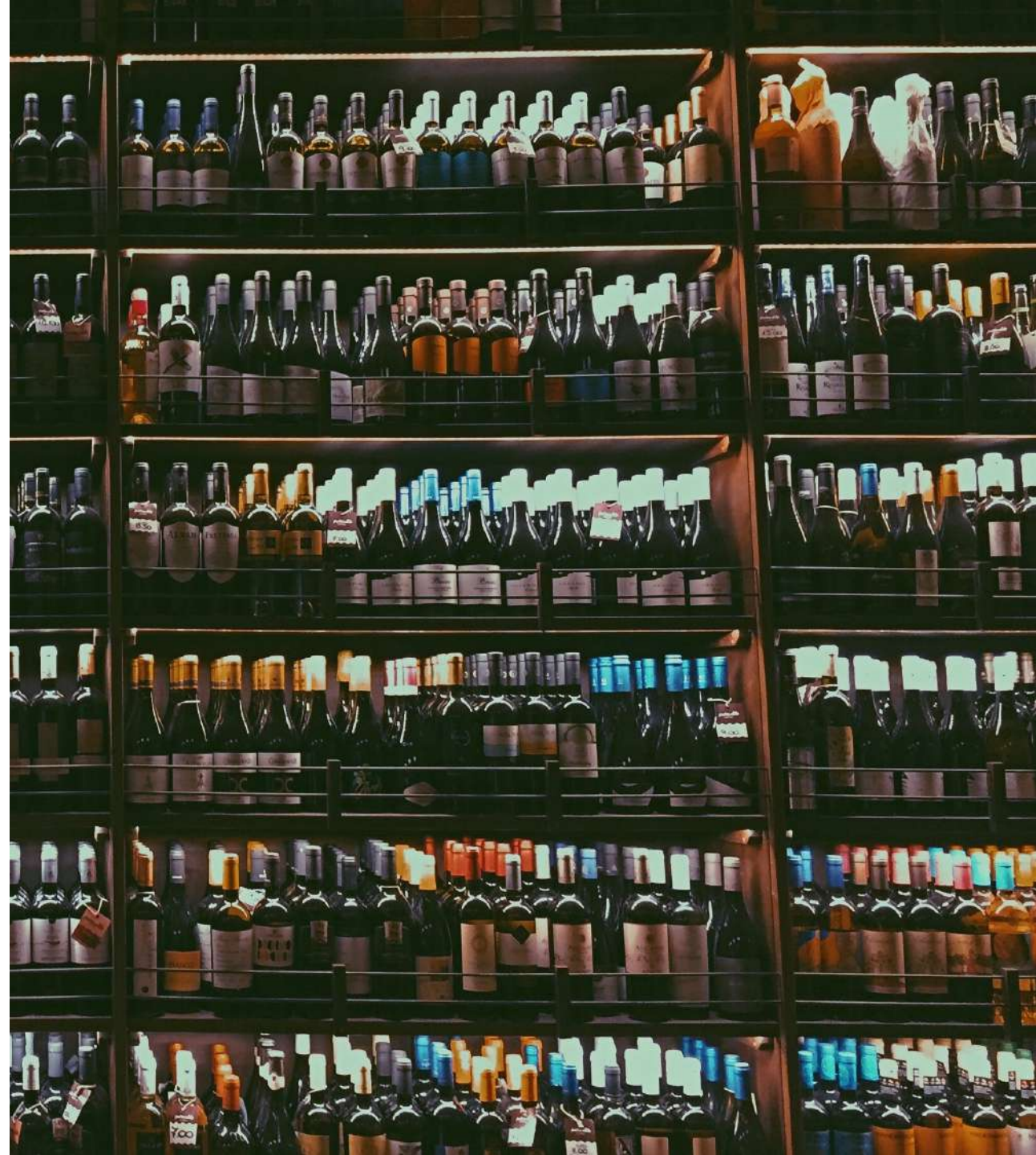
STATE OF WINE IN THE UK & IRELAND



CALIFORNIA WINES

CALIFORNIA WINE IN THE UK & IRELAND

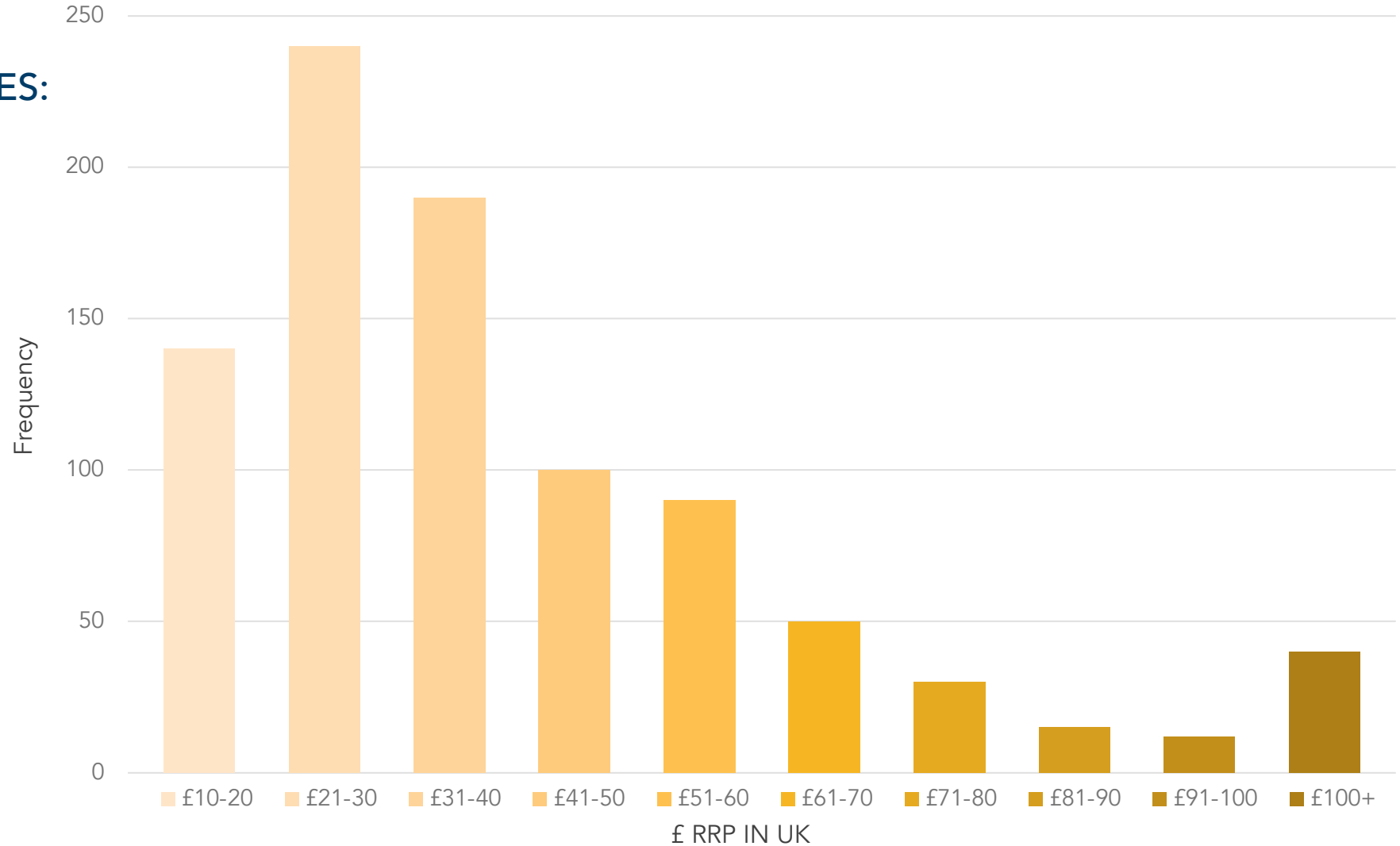
- Size of Total UK Off-Trade wine market: \$10 Billion
- Average price of wine sold in Off-Trade: \$10.50 per bottle (\$1.20 Ex-cellar)
- Size of UK Off-Trade wine market over \$10.50 per bottle: ~ \$1 Billion



PRICE DISTRIBUTION CHART OF CALIFORNIA WINE

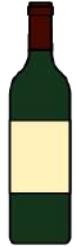
OF THE ALMOST 900 WINES:

- 85% were over £20
- 26% were over £50
- 5% were over £100



BACK-VINTAGE WINE – AN OPPORTUNITY

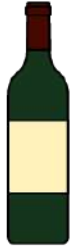
ROBERT MONDAVI WINERY – CURRENT STOCK AT HEDONISM, LONDON



Mondavi Cabernet Sauvignon 1974

41

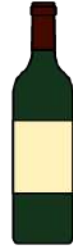
Available £312



Mondavi Reserve Cabernet Sauvignon 1975

5

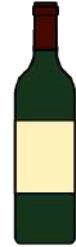
Available £488.00



Mondavi Cabernet Sauvignon 1976

7

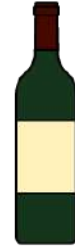
Available £272.00



Mondavi Reserve Cabernet Sauvignon 1978

2

Available £1,880.00



Mondavi Reserve Cabernet Sauvignon Magnum 1978

1

Available £888.00



Mondavi Cabernet Sauvignon 1978

2

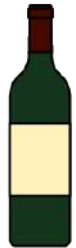
Available £230.00



Mondavi Reserve Cabernet Sauvignon 1980

1

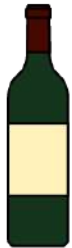
Available £311.00



Mondavi Cabernet Sauvignon 1982

2

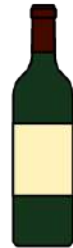
Available £132.00



Mondavi Reserve Cabernet Sauvignon 1982

11

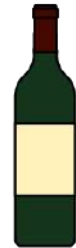
Available £262.00



Mondavi Reserve Cabernet Sauvignon 1987

22

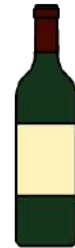
Available £268.00



Mondavi Cabernet Sauvignon 1987

10

Available £188.00



Mondavi Reserve Cabernet Sauvignon 1988

16

Available £244.00



Mondavi Reserve Cabernet Sauvignon 1992

4

Available £164.00



Mondavi Reserve Cabernet Sauvignon 2008

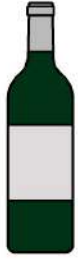
2

Available £158.00



BACK-VINTAGE WINE – AN OPPORTUNITY

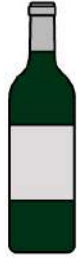
SILVER OAK WINES – CURRENT STOCK AT HEDONISM, LONDON



Silver Oak Alexander Valley
1980

8

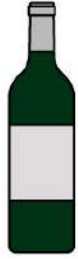
Available £242.00



Silver Oak Alexander Valley
1984

5

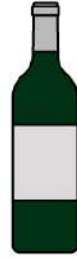
Available £464.00



Silver Oak Alexander Valley
1986

1

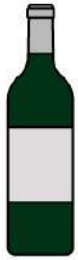
Available £1,890.00



Silver Oak Alexander Valley
Collection

1

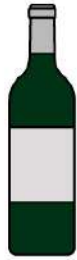
Available £3,880.00



Silver Oak Alexander Valley
Magnum 1984

4

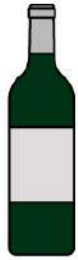
Available £992.00



Silver Oak Bonny's Vineyard
Cabernet Sauvignon 1981

17

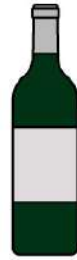
Available £488.00



Silver Oak Napa Valley
1980

11

Available £198.00



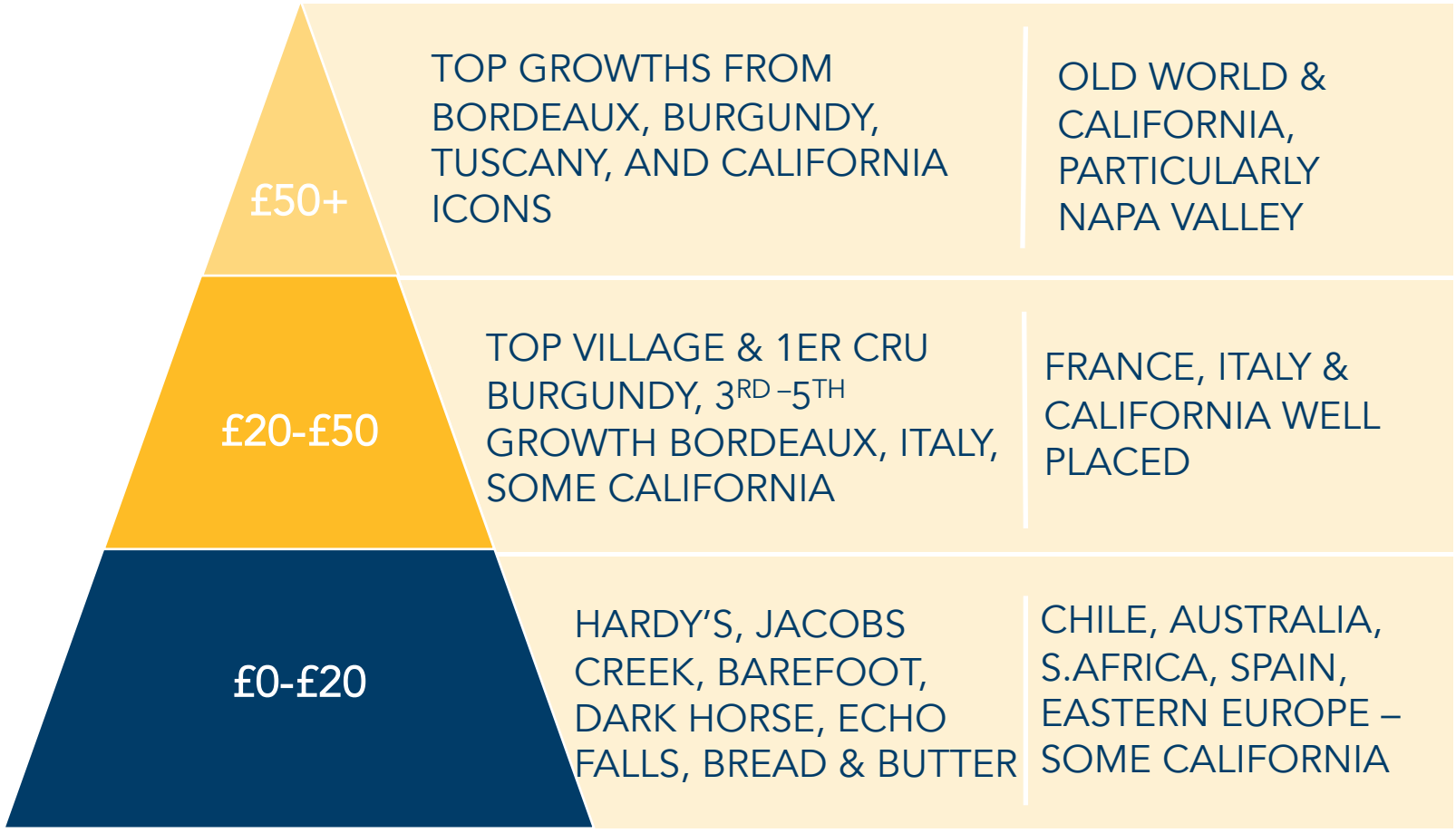
Silver Oak Napa Valley 300cl
1984

3

Available £1,120.00



PRICING & COMPETITIVE SET



RETAIL PRICE

REGIONS / BRANDS

DOMINANT

TRANSLATING EXW USD COST INTO GBP RETAIL PRICE				
EXW per 75cl bottle				
\$10	\$20	\$30	\$40	\$70
UK retail price per bottle £				
£25	£45	£62	£80	£135

OUR CONTRACTUAL OBLIGATIONS

1. Develop **annual marketing programs** for targeted country(ies);
2. Plan and execute promotional and public relations programs included in the approved **Unified Export Strategy (UES)** developed for the Market Access Program (MAP);
3. Work with advertising, public relations and promotional agencies in executing approved programs;
4. **Collect and distribute market information** to Institute and wineries doing business in the market and wineries seeking entry to the market;
5. Assist member California wineries with **market entry and increased market penetration**;
6. **Work with importers of California wines** and provide information regarding marketing support programs and information regarding the California wine industry;
7. Assist importers and the retail trade with **finding suitable California wine brands**;
8. **Represent the industry at trade events, tastings and receptions**;

CONTINUED OVERLEAF

OUR CONTRACTUAL OBLIGATIONS – CONT.

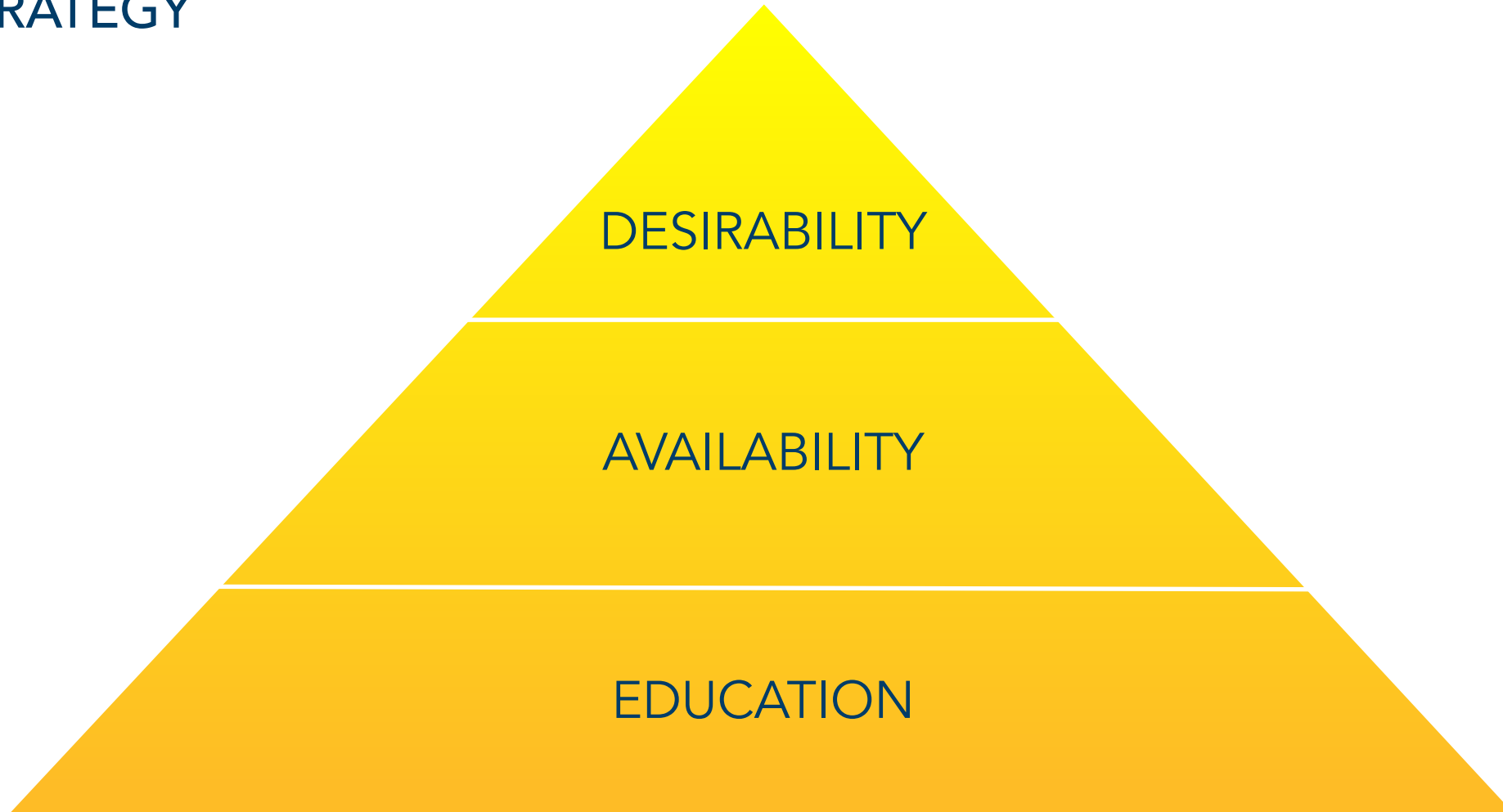
9. Provide current **market intelligence** to the Institute regarding **problems or opportunities** for California wines;
10. Assist **regional and varietal wine associations** as requested;
11. Develop **relationships and maintain contact with the U.S. Foreign Agricultural Service (FAS)** offices;
12. Prepare **monthly reports** summarizing market activities and describing developments important to the wine industry;
13. Provide an **annual report** on California wines in the markets including import statistics, market shares, sales data, consumer and trade developments, competitive information, an overview of importers/distributors of wine, tax/labelling issues, pricing, distribution channels, opportunities, etc.;
14. Produce **evaluations of all activities and promotions** conducted during the marketing year on behalf of Institute using the guidelines and formats provided by the Institute;
15. Prepare other reports as requested, including **project summaries with results for all UES activities**;
16. Perform other activities and functions supporting California wines in the markets as communicated by and agreed to with Institute's Vice President International Marketing.

CALIFORNIA WINES

INSIGHT THAT LEADS
TO OUR STRATEGY



OUR STRATEGY





FEATURES V BENEFITS MARKETING

FEATURES VS BENEFITS MARKETING



iPod.

1,000 Songs in your pocket.



WHAT ACTIVITY DOES
THAT LEAD TO?
UNITED KINGDOM & IRELAND



CALIFORNIA WINES

CAPSTONE CALIFORNIA

- SEPTEMBER 2023: ONLINE SEMINAR
- JANUARY 2024: IN-PERSON CONFERENCE
- WHOLE YEAR: UK REGIONAL ROLL-OUT



CALIFORNIA WINES

THE KICKSTARTER PROGRAM – JULY 2023 TO JUNE 2024

THE KICKSTARTER PROGRAM: A funding scheme to grow California Wine sales in the UK and Ireland



KICKSTARTER PROGRAM

CALIFORNIA WINES

THE CALIFORNIA SUMMIT OCTOBER 19 & 20, 2023

A 2-day, State-of-the-Union style retreat for the UK's key decision makers to identify growth opportunities.

- Roundtables
- Workshops
- Masterclasses



CALIFORNIA WINES

THE CALIFORNIA SUMMER PARTY SEASON 2024

DUBLIN: TUESDAY 11 JUNE

LONDON: THURSDAY 13 JUNE

This is the time for you to come to London and Dublin and work with your Importers in the lead up to the Summer Party Season 2024



DESIRABILITY
AVAILABILITY

EVEN MORE ACTIVITY
JULY 2023 TO JUNE 2024





EMERGING MARKETS:
UNITED ARAB EMIRATES & INDIA

STATE OF WINE MARKET AND OF CALIFORNIA IN UAE & INDIA



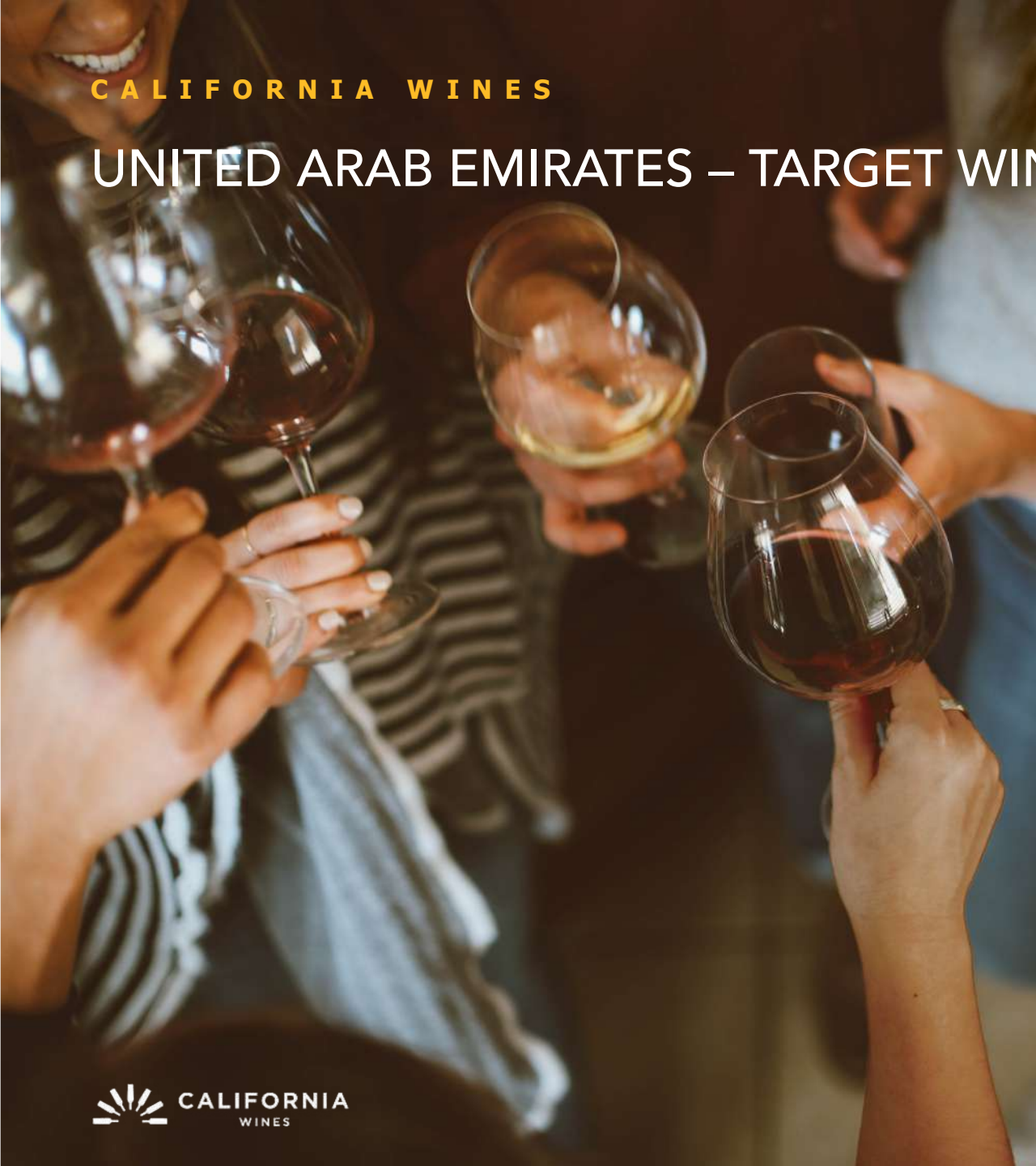
UNITED ARAB EMIRATES – CONSUMPTION

ON THE RISE: GROWING BY 16% PER YEAR



CALIFORNIA WINES

UNITED ARAB EMIRATES – TARGET WINE CONSUMER

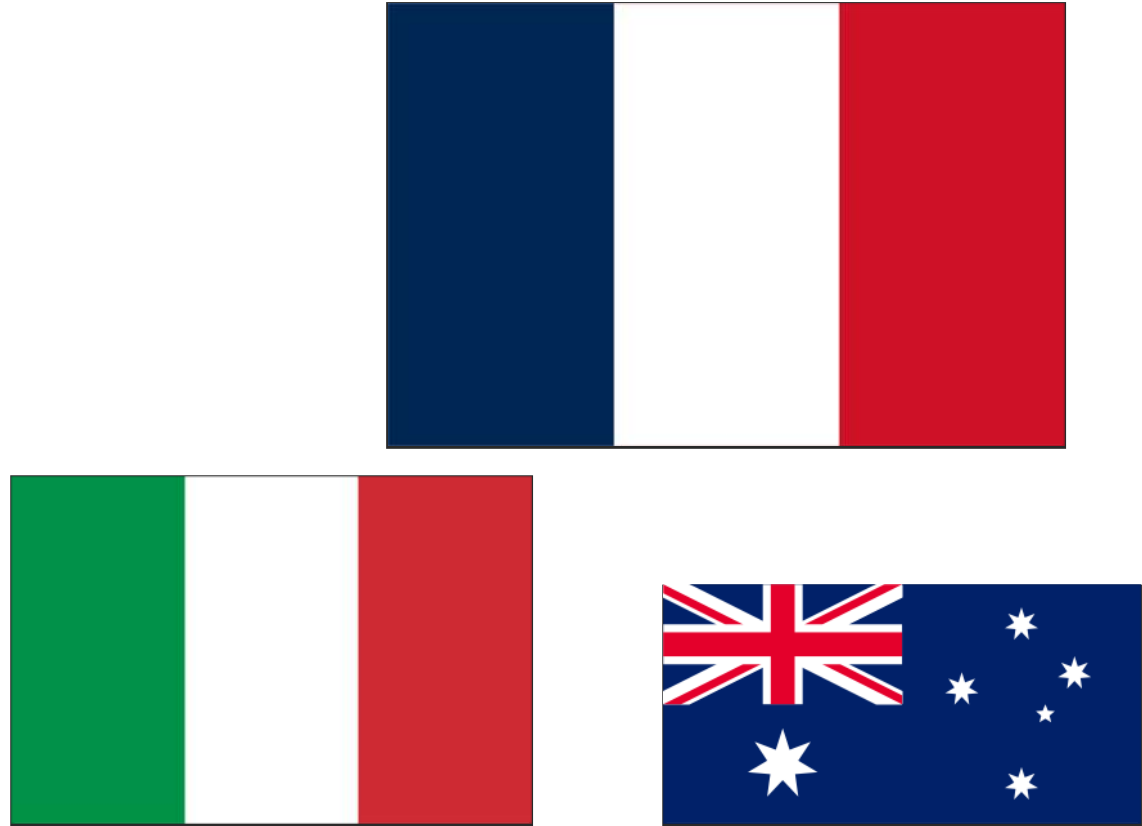


UNITED ARAB EMIRATES – COMPETITION

FRANCE, ITALY AND AUSTRALIA ARE STRONG COMPETITORS FOR CALIFORNIA WINE.

Market Share

France	50.67%
Australia	8.82%
Italy	6.20%
USA	5.41%
South Africa	4.13%
Chile	2.32%
NZ	2.21%



UNITED ARAB EMIRATES – DISTRIBUTION



UNITED ARAB EMIRATES – OPPORTUNITIES



UNITED ARAB EMIRATES – ENTRY POINT TO THE REGION



INDIA



INDIA - CONSUMPTION

THE INDIAN WINE
INDUSTRY TODAY

US \$238
MILLION

Estimated value of
India's wine market

INDIAN ALCOHOL BEVERAGE INDUSTRY IN 2020

US\$ 31.25 BILLION

by value

1 BILLION

cases by volume

INDIA - CONSUMPTION

INDIAN WINE INDUSTRY IN 2020

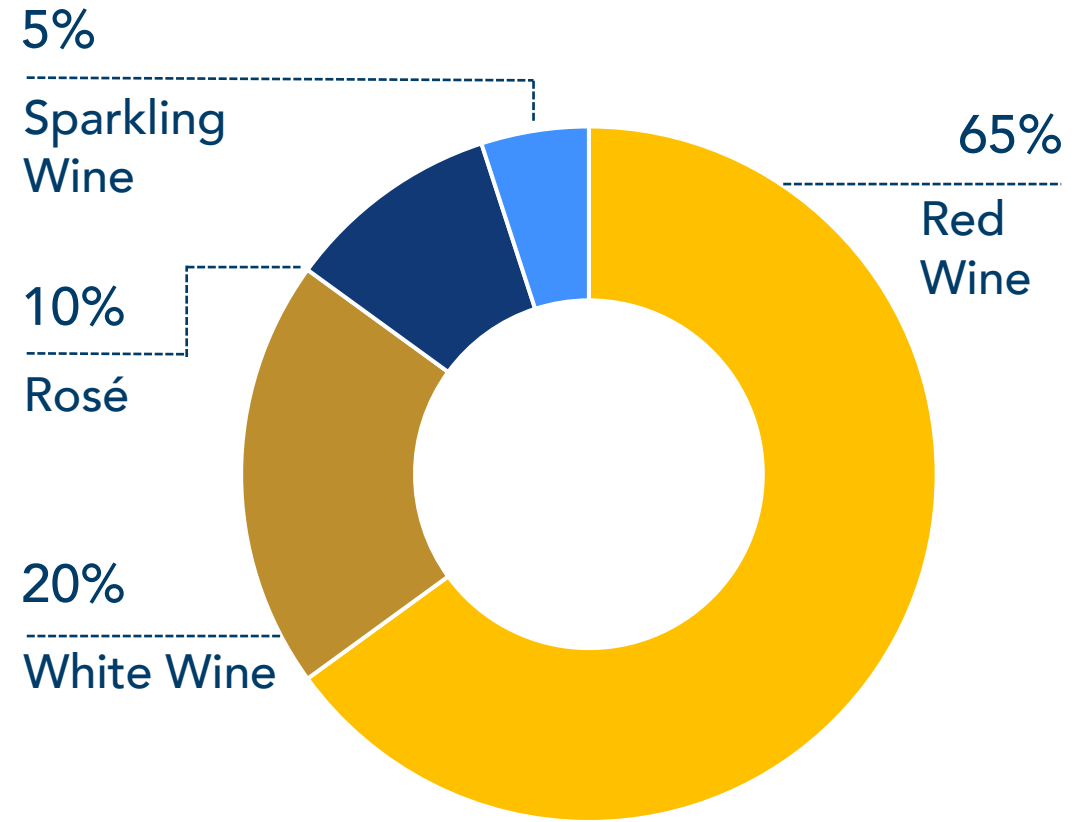
2.5
MILLION
cases by volume

US\$ 230
MILLION
in value

IMPORTED WINE vs DOMESTIC

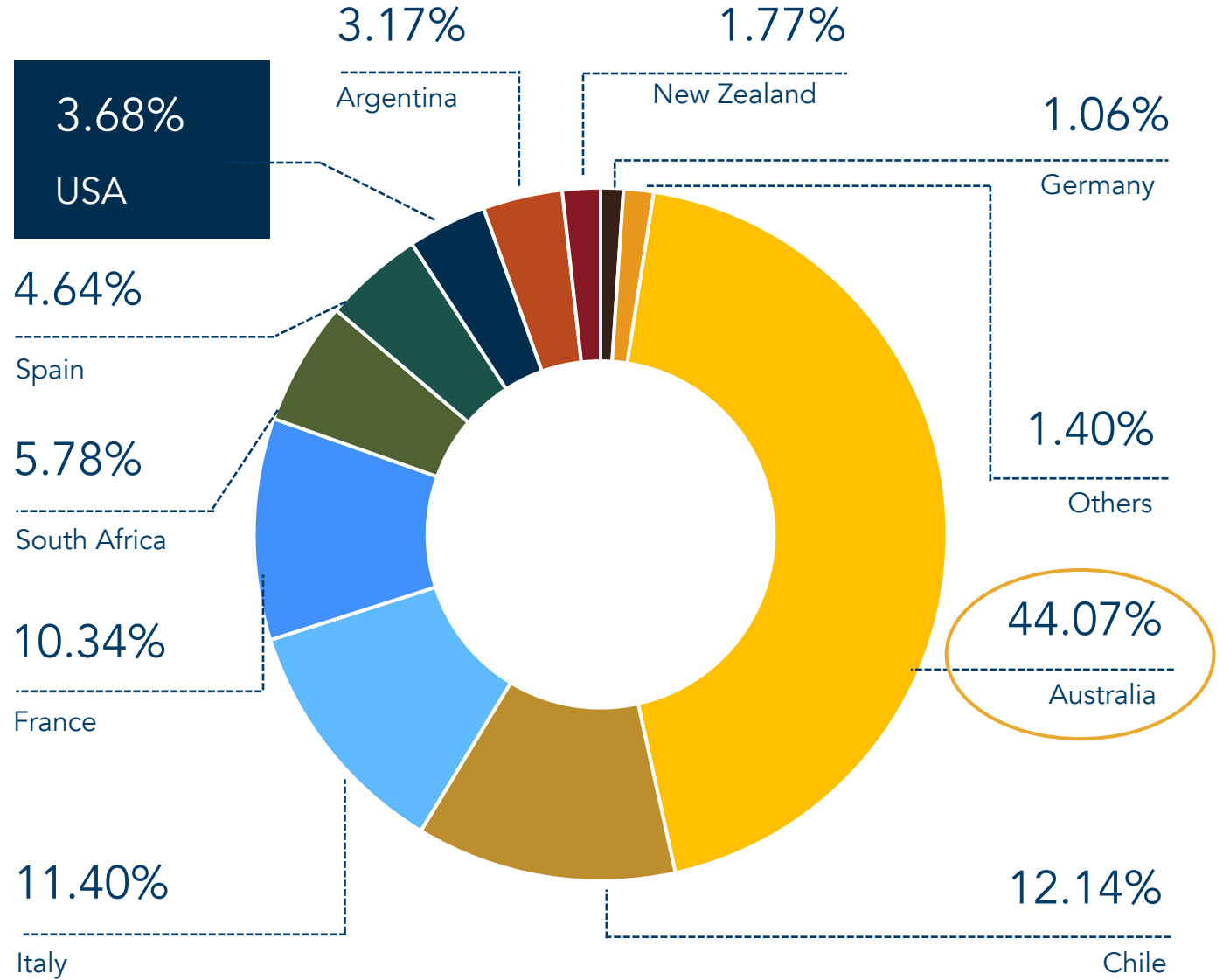


SHARE OF WINE TYPES CONSUMED



INDIA - COMPETITION

STILL WINE IMPORTS BY COUNTRY IN 2020



CALIFORNIA WINES

STRATEGY IN EMERGING MARKETS



PROWINE INDIA – MUMBAI, NOVEMBER 24 & 25, 2023

- For Wineries Seeking Representation
- Masterclass opportunity for In-Market Producers



GBM MARKET BRIEFING INDIA – OCTOBER 3, 2023



**GLOBAL
BUYERS
MARKETPLACE**
NAPA VALLEY

Welcome to the second gathering of the best and brightest in the California wine industry and the leading wine buyers and importers in the global wine market.



Nov. 6 - 8, 2023
Napa Valley, CA

CALIFORNIA WINES

DUBAI: TRADE TASTING AND WINERY NETWORKING EVENTS - FEBRUARY 15 & 16, 2024

DESIRABILITY
AVAILABILITY



CALIFORNIA WINES

EMERGING MARKET GUIDES



OUR KEY MESSAGE TO YOU

UAE & INDIA – EMERGING MARKETS

“... We choose to do these things not because they are easy, but because they are hard.”

President John F Kennedy, 1962





THANK YOU

