



WELCOME & GLOBAL UPDATE

HONORE COMFORT
VICE PRESIDENT, INTERNATIONAL MARKETING

PRESENTING TO:

Export Program Annual Meeting

DATE:

July 23 , 2024

Network: Wine Institute
PW: californiawines!



TODAY'S AGENDA

MORNING SESSION

- Welcome
- Global Update & Year in Review
- Driving Growth in Export Markets
 - Global Trade Strategies
 - Emerging & Developing Markets
 - Capstone California 2.0
 - Uncorking Global Success
- A New Narrative for Wine
- LUNCH

AFTERNOON SESSION

- Market Dashboards
- TEAMTalks: Best Ideas of the Year
- Breakout Sessions
 - Making the Most of your Membership
 - WUSATA Funding
 - Program Updates: Europe, Canada, GCSEA & Mexico
 - Rep One-on-One mtgs
- TEAMTALK AWARDS & Wrap-up
- Pinot by the Pool Reception

EXPORT PROGRAM EXECUTIVE COMMITTEE

Committee Members

- Sally Burton, Jackson Family Wines
- Molly Davis, E&J Gallo Winery
- Vivien Gay, Silver Oak/Twomey/Ovid
- Brad Groper, Long Meadow Ranch
- Joan Kautz, Ironstone Vineyards
- Joe Lange, LangeTwins *Chair*
- Michael Parr, Wente Vineyards
- Leigh Ann Reed, Boisset Collection
- Claudia Schug, Schug Winery
- Abigail Smythe, Crimson Wine Group
- Brent Shortridge, Vin-de-Cal



A MOMENT...



Joining Us Today

Allison Jordan

Vice President, Environmental Affairs &
Executive Director, CSWA

Gino Di Caro

Director, Communications & Media Relations

Ian Blue

Director, Member Relations

Shin Kao

Manager, Information Technology

WINE INSTITUTE & EXPORT PROGRAM

How Are They Different?

WINE INSTITUTE

- Public Policy focus
- CA, Other States, Federal & Int'l
- Offices in DC & Sacramento
- Over 1,000 winery members
- Member dues & grant funding
- Leading voice for CA wine



EXPORT PROGRAM

- Marketing focus
- Global Team
- Offices in 12 countries
- 225+ winery members
- Any CA winery can join
- USDA funding & Member dues



US WINE EXPORT VALUE - 2023

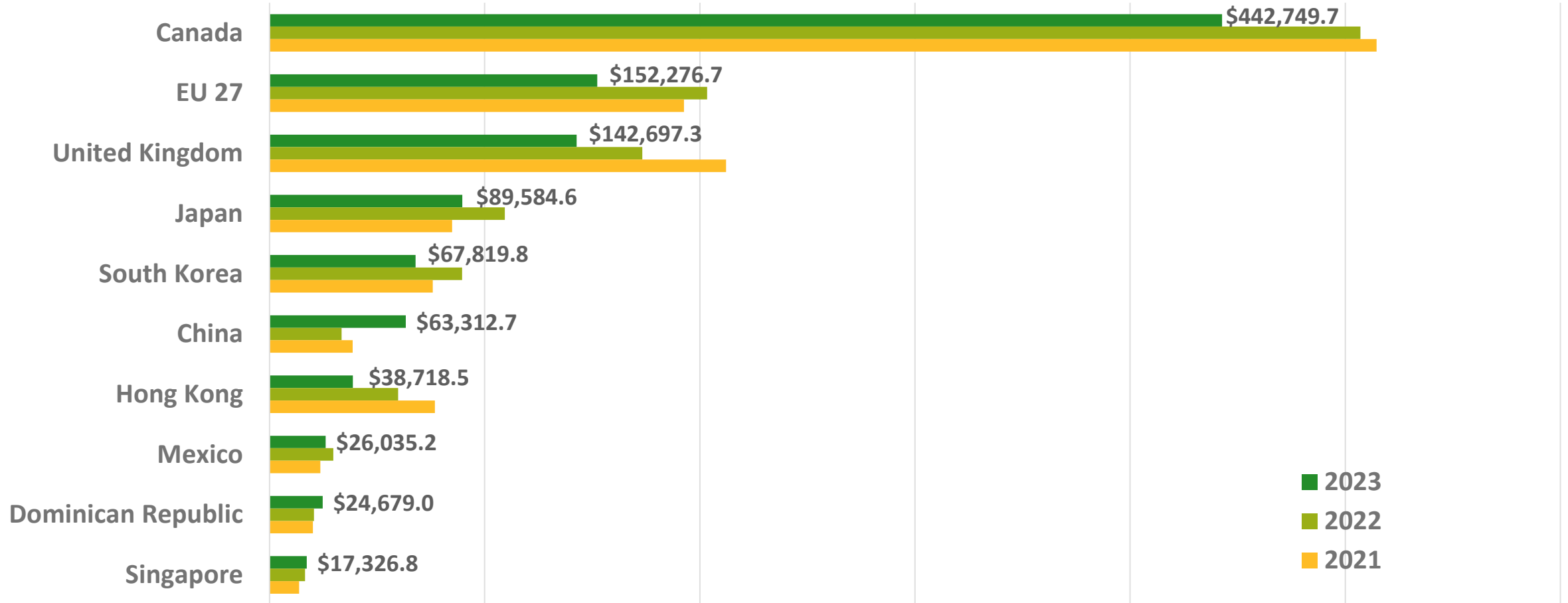
Opportunity for Growth

- California- 4th Largest World Wine Producer
- U.S. Wine Exports Account for 3% of Global Wine Exports

Region	Annual Exports (2023)	Global Share
1. France	\$12.8 bn	31.6%
2. Italy	\$8.3 bn	21.3%
3. Spain	\$3.1 bn	8.0%
4. Chile	\$1.5 bn	3.7%
5. Australia	\$1.3 bn	3.3%
6. New Zealand	\$1.3 bn	3.1%
7. US (+95% CA)	\$1.2 bn	3.0%

SOURCE: OIV STATE OF THE WINE & VINE SECTOR 2023

TOP MARKETS FOR U.S. WINE EXPORTS: 2023 (millions)



SOURCE: TRADE DATA MONITOR; US
DEPT OF COMMERCE by Value (USD)

Opportunities in the Global Marketplace

California Wine is positioned for growth in global markets

- Super/Ultra premium & luxury segments still healthy
- Funding to develop new & emerging markets
- California's identity & values align w/ younger consumers
- Leverage California's leadership in sustainability



California is widely regarded recognized as the leading prestige wine region outside of Europe

“Companies need to reorientate their global strategies to target new growth opportunities... geographic footprint will be increasingly important.”

- Emily Neill, IWSR

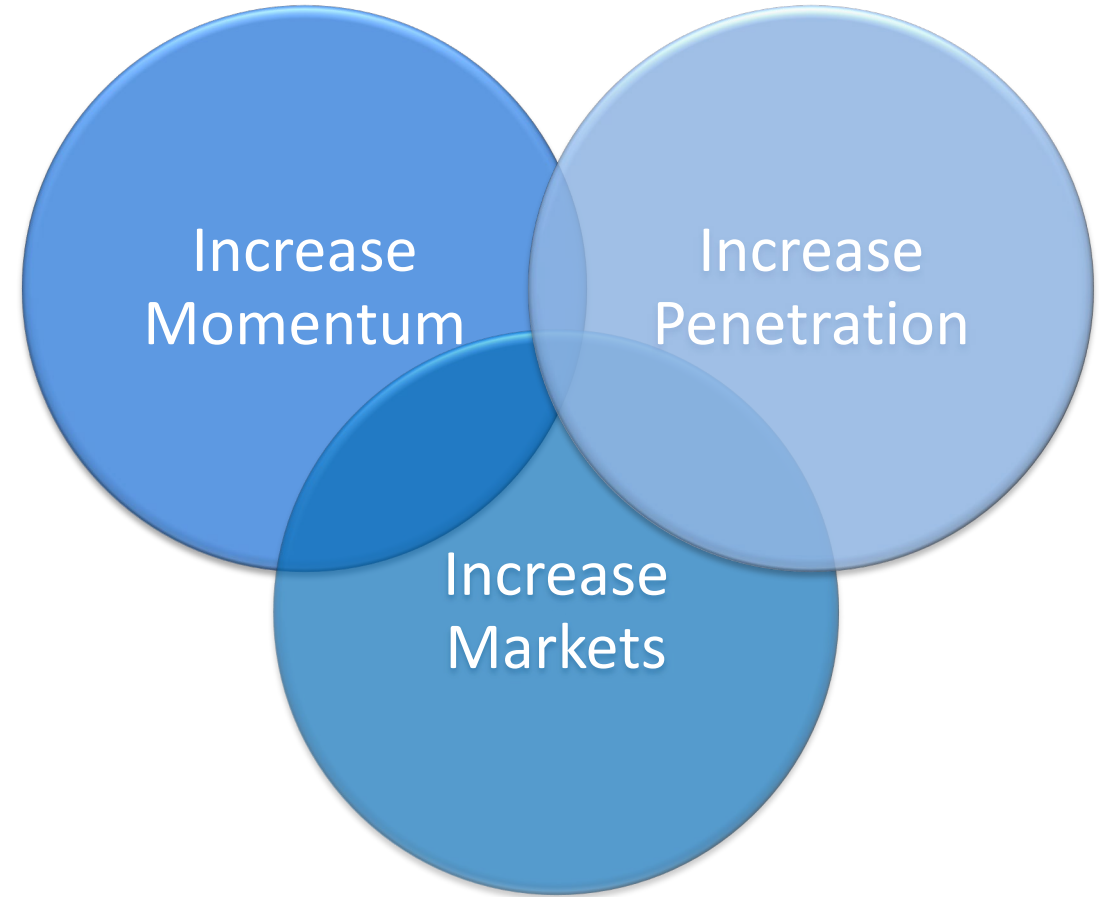
Creating Opportunity



REGIONAL AGRICULTURE PROMOTION PROGRAM (RAPP)

Wine Institute received \$13 million

- Support expansion into new markets & develop emerging markets
- Funds available for 5-years
- Second tranche to be awarded May 2025
- Eligible regions:
 - Africa
 - Southeast Asia
 - South Asia (India)
 - Non-EU: UK, Switzerland, Norway
 - Caribbean
 - Latin & South America



PARTNERSHIPS ON A GLOBAL SCALE

Partnering on a Global Scale

- Institute of Masters of Wine
 - Commitment to wine education
 - ARENI: Roundtable for Fine Wine
 - Research & discussions on wine's future
 - VinExposium & ProWein
 - International Trade Exhibitions
 - Business for Social Responsibility (BSR)
 - Non-profit advisory group on social sustainability
 - USAEDC Executive Committee
 - Connection to FAS Leadership
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FORMULA FOR GROWTH

A tried & tested approach





CALIFORNIA
WINES

THANK YOU

calwineexport.com

Honore Comfort, VP International Marketing



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Upcoming Events & Trade Visits

Export Program Annual Meeting – July 23

- The Lodge at Sonoma, Sonoma

SAQ Buyers Visit – June 2024

- Lodi & Central Coast focus

Korean Sommelier Tour – June 2024

- Napa Valley, Sonoma County, Lodi, Central Coast

LCBO Buyers Visit – Fall 2024

- Napa Valley focus

For a complete list of upcoming events, programs and activities don't miss the monthly California Connection newsletter or go to calwineexport.com