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A strategy to export Swiss wine to Germany: the case of Uvavins-Cave de La Côte

Bachelor Project submitted for the Bachelor of Science HES in Business Administration with a major in International Management

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Declaration

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Geneva, 29th May 2015

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Executive Summary

Uvavins - Cave de la Côte is a Swiss based company producing and selling wines in Switzerland and abroad. The relatively high per capita consumption of wine in Switzerland used to allow domestic wine makers to sell the entire production locally without too much difficulty. However, this trend is changing and it has become more challenging to sell Swiss wines to Swiss people. The decrease in national consumption and the pressure on prices with imported wines being the two main reasons to explain this phenomenon.

As a response Uvavins has been trying to expand its activities in different countries and now sells wines across the world in countries such as China, Germany or Japan. When approached to help them grow abroad, the company expressed its interests in looking into the German market. Since 2012, an employee has been working for Uvavins to boost sales of Swiss wines on the German territory. However, the company's expectations weren't reached and the situation has been stagnating. Even if sales increased from one year to another, Germany used to be the biggest importer of Swiss wine in volume, so the company had bigger aspirations.

Therefore, the goal of this paper attempts to raise a list of opportunities for Uvavins on that specific market. By following them, the Swiss company should be able to strengthen its position, increase its exportation and achieve higher profits. Each opportunity has a certain potential and implications, consequently an interview with a wine specialist has been conducted in order to decide which one should be pursued.

After analyzing the German market and the company itself, seven market opportunities were defined. From that initial selection, about four of them demonstrated the highest potential: the premiumisation of the range of products meaning that the company should focus on a limited amount of high-end wines, the closing of distribution channels in order to prioritize the Direct Sale and Specialists, the brand identification by using the Swisswine symbol to increase the product awareness and the development of new partnerships to have other ways of attracting customers.

These opportunities were developed while keeping in mind that the company isn't willing to invest heavily in its expansion. The analysis clearly highlighted the fact that there is a lack of strategy and that the company needs to work on its positioning and image.

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Introduction

In the Antiquity, the Phoenicians, people living in the actual Lebanon, are the one who started exporting wine. They implemented their commercial activities around Marseille in the fourth century B.C, followed by the Romans who opened routes such as the Rhone Valley or the Via Romana. Three centuries later, the Romans started "large scale" wine exports using amphora to carry the liquid. In the Middle Ages, the clergy and nobility were the one controlling the market in France after the Romans. From the year 1154, Bordeaux and Bourgogne restricted their competitors from the access to ports, so that they dominated the export market and the French viticulture in general.

In the sixteenth Century, Europeans conquered the world and brought their wine with them. At first, the wine was mainly brought for religious purposes and Spain or Portugal were importing varieties in Mexico. From there, it went to California where they started growing wine from San Diego to San Francisco. Afterwards, European immigrants planted vineyards on the five continents for their personal consumption.

From the eighteenth Century, viticulture and exchanges never stopped growing despite some major slowing factors such as the phylloxera bacteria in Europe or the Prohibition in the US. Wines were classified according to their origin and type. As of today, the estimations are that the Old World[1] is consuming 80% of its production and exporting the remaining 20%, whereas the New World is consuming 10% and exporting 90% (Resnick, Roany 2012: 1-4).

In Switzerland, the wine production is almost entirely consumed within the country borders. Recently, the Swiss producers realized export had to be part of their strategy due to different market factors. In this new dynamic, companies such as Uvavins-Cave de la Côte are willing to develop a new strategy to grow abroad.

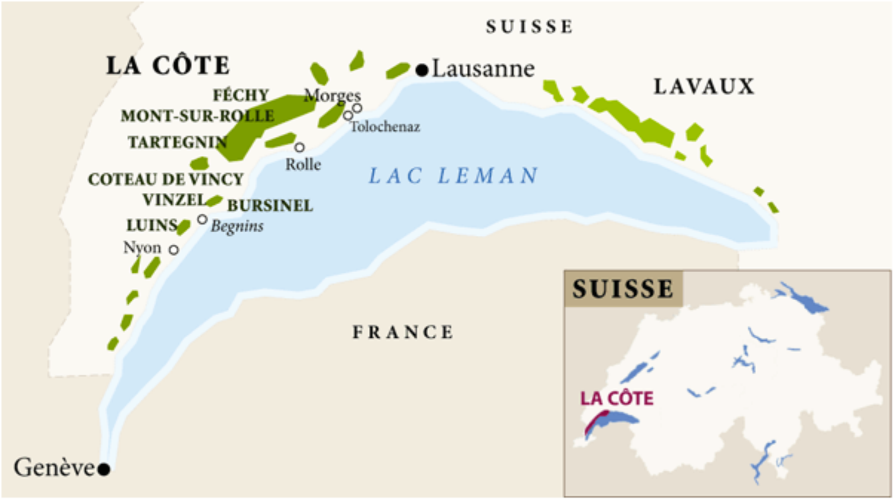
The company

Uvavins-Cave de la Côte was created in 1929 by winemakers from the Swiss region of "La Côte". Nowadays, the wine cooperative counts 320 producers with more than 415 hectares of vineyards. The company has two production sites in Switzerland, one in Tolochenaz, next to the city of Morges and the other in Nyon.

[1] In the wine industry, the Old World generally refers to Europe. The New World refers to the United States, Australia, New Zealand, Argentina, Chile, South Africa, China and a few others.

Each site has a production capacity of 20,000 hectolitres and the company elaborates 200 different wines. Uvavins is producing both still and sparkling wines from 29 varieties. For the aging, Uvavins uses 800 vats, among which there are 200 oak barrels (Uvavins 2015).

Figure 1 - La Côte Vineyard Region



Source: Uvavins 2015

The different regions are shown on the above figure; the region of La Côte is on the left-hand side, where there are the dark green areas. On the right-hand side, the region of Lavaux is shown in light green; this is another producing area classified as a World Heritage site by the UNESCO. Thus Uvavins regroups about 1800 parcels that belong mainly to small producers between the cities of Nyon and Lausanne.

Uvavins is selling its wine mainly in Switzerland, but has the ambition of selling more and more abroad. Currently the Swiss cooperative is exporting wines in Germany, France, Japan, China and the US among others. For Uvavins and for the Swiss wine industry in general, exportation was not used as part of the strategy. In the last 5 to 10 years, the notion appeared after wine producers realized it was not only interesting to sell abroad, but crucial as well.

Research questions

For the last 20 years, the exports of Swiss wine have been stagnating around 1% of the total production and no measure was undertaken in order to increase that number. Swiss producers did not really feel the need of looking beyond the borders as they were easily selling their production on the domestic market.

Pierre-Emmanuel Buss, wrote in its article “L’export, le grand défi des vins suisses”[2] in Le Temps, that due to that lack of presence abroad, Swiss wines experience an extremely low product awareness and it enhances the challenge of exports.

For the last 15 years, the imports of foreign wines have been increasing in Switzerland; on top of that, Pierre-Emmanuel Buss explains that with the decrease in consumption and the strong Swiss currency, local Swiss wines are under pressure. Consequently, new export strategies are crucial. The IVVS[3] aims at exporting 5% of the Swiss production in 2020.

Early 2015, Le Nouvelliste published an article[4] in which Laurent Favre, the ex-director of the IVVS forecasts diminishing market shares for domestic wines in Switzerland for the year 2014. The European Union planned on investing heavily to support the export of wines in non-member countries such as Switzerland. Therefore the pressure will be even more intense for Swiss producers.

On its website, Swisswine, the Swiss wine promotion agency, emphasizes on the increase in Swiss wines’ quality and writes that some producers have been able to demonstrate it during international contests. The quality of wines in Switzerland can be associated with the recognized Swiss expertise.

Even with international recognition, Swiss wines are encountering difficulties in entering foreign markets. Uvavins has been developing its export activities for a few years, but still cannot consider foreign markets as very profitable ones. In 2012, Uvavins opened its German entity and expected to be profitable after three years. However, the results aren’t very conclusive yet and the strategy in Germany seems a little unclear.

So, what are the specificities of the German market and what do the consumers expect? What is the company’s situation and where could it fit with the German market? How Uvavins could take advantage of its strengths and opportunities in order to grow in Germany? What are the points the company needs to focus on, in order to build an effective export strategy?

[2] In English : Export, the big challenge for Swiss wines.

[3] Interprofession de la vigne et des vins suisses (inter-branch organisation for Swiss wines and vineyards).

[4] “L’Interprofession de la vigne et des vins suisses peut tenir les prix des vins locaux”

1. Analysis

1.1 Research Methodology and Data Collection

The paper will be based on a comprehensive analysis of the German market and of Uvavins-Cave de la Côte, as an exporter of Swiss wine. In order to have rich content and develop proper recommendations at the end of the work, data will be collected from different primary and secondary sources:

The analysis of the German market is mainly composed of secondary sources. Articles, books, and Internet sources provide the information. Some additional content comes from primary sources such as the interview with Klaus Immes, the responsible for Uvavins' German entity.

The analysis of the company is mainly composed of primary sources. The interviews with Sylvie Camandona, the chief of sales in Switzerland and Klaus Immes, for the German market are the two main sources of information. In addition, the company's website and external Internet sources are used as a complement.

Market opportunities are developed out of the analysis and each of them is weighted in order to define its potential, feasibility and correlation with the company's ambition. An additional interview with Pierre Thomas, public relations and wine specialist, is conducted in order to challenge the list of opportunities and set up the final strategy.

The combination of primary and secondary sources is crucial to understand the ins and outs of the wine export industry. The interviews with various people from inside and outside of the company are a real value added to this paper and give a more objective representation of the current situation.

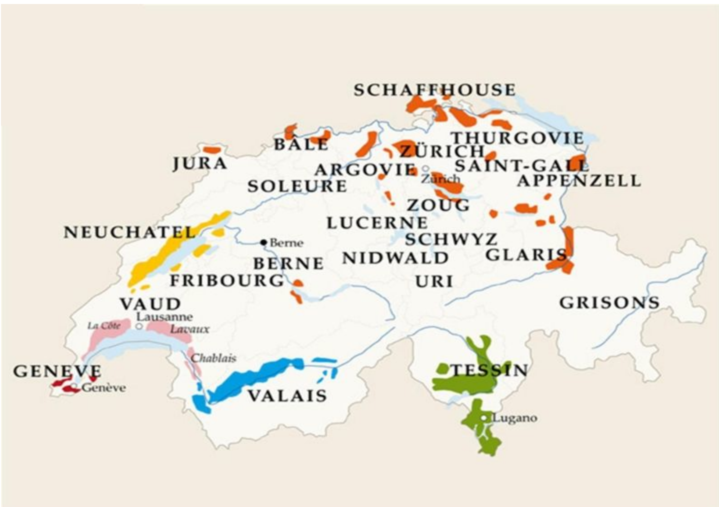
1.2 Swiss' Wine Conjuncture

1.2.1 Production

According to the OFAG[5] the wine-producing areas in Switzerland amounts to 15,000 hectares and is divided between red (58%) and white (42%) grapes. The production is divided between 6 main areas (Cavesa 2013):

- The Canton of Valais is the biggest player with 5,000 hectares of vineyards producing mainly white wine such as Fendant or Chasselas.
- Vaud accounts for more than 3850 hectares with a production dominated by varieties such as Pinot noir, Gamay or Chasselas.
- Geneva has about 1300 hectares of vineyards and produces mainly Chasselas, but also Müller-Thurgau and Chardonnay.
- Neuchâtel with its 600 hectares is also dominated by the production of Chasselas, followed by Chardonnay and Pinot noir.
- The German part of Switzerland represents about 2000 hectares spread between the different Cantons. For instance Zurich and the Grisons producing Pinot noir.
- Ticino cultivates more than 1000 hectares and produces mainly red wines with Merlot as a basis.

Figure 2 - Swiss' Wine Producing Areas



Source: Zufferey 2012

[5] Office Fédéral de l'Agriculture (Swiss Agricultural Office)

The 2013 harvest produced about 84 million litres of wine (lowest harvest since 1980). As a comparison, and to show how difficult it is for Switzerland to be competitive, the production in France amounted to 4.2 billion litres and in the State of California 2 billion litres in 2013 (Girard 2014).

About 200 varieties are grown in Switzerland, among which are indigenous and cross-cloned varieties. In both red and white wines, about 5 or 6 references account for the majority of the production. For example Chasselas, a delicate wine with a great minerality is the white grape produced in the highest quantity. This variety has become one the Swiss flagships internationally (Gavillet 2009).

Table 1 - Swiss Varietals

Reds	**Whites**
Pinot Noir (52%)	Chasselas (66%)
Gamay (19%)	Müller-Thurgau (8%)
Merlot (12%)	Chardonnay (5%)
Gamaret (4%)	Silvaner/Johannisberg (4%)
Garanoir (2%)	Pinot Gris/Malvoisie (2.5%)
Syrah (2%)	Amigne, Pinot Blanc, Charmont, Humagne Blanche, Petite Arvine, Riesling, Gewürstraminer, Heida and some seventy non listed (14,5%)
HumagneRouge, Diolinoir and some other fifty-plus/non listed (9%)	

Source: Gavillet 2009

1.2.2 Consumption

Swiss wines are divided according to their classes: wine with a controlled designation of origin (AOC[6]), country wine (“vin de pays”), or table wine (“vin de table”). About 95% of the production is in the AOC class (OFAG 2014: 8-10). Therefore, when it comes to regional consumption numbers, only the AOC class is taken into account. The Appendix 1.2.1 shows the detailed consumption of the country, including imports and exports. The general consumption increased between 2012 and 2013, after three consecutive years of decline.

[6] Appellation d’Origine Contrôlée

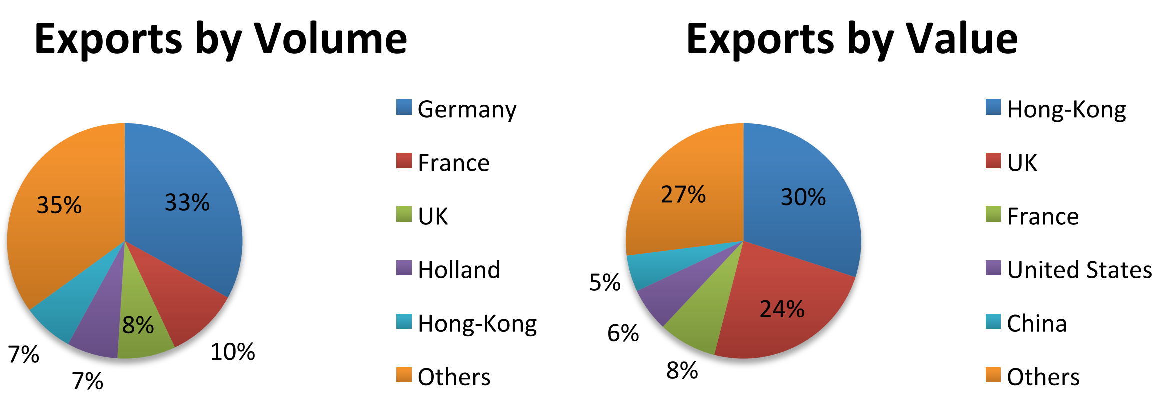
Out of a total of 2.72 million hl[7] of wine consumed, 40% is produced within the country and 60% is imported. The indigenous production cannot satisfy the demand by far; Swiss people are important wine consumers. Switzerland is actually ranked world's 4th for the per capita consumption of wine with 33 litres per inhabitant in 2012 (Thomas 2013).

1.2.3 Exports

The Appendix 1.2.1 table shows exports amounting to 17,084 hl; that represents 2% of the total production. That number hasn't changed much for the past 20 years. Up to now, exporting wine hasn't crossed winemakers' mind thanks to quotas protecting the local market in the 90's. However, it changed in 2001 and the imports skyrocketed since then. The imports of foreign white wines went from 24 to 37,5 million litres in ten years. On top of that, the Swiss Franc's costliness did not help (Buss 2013). The Swiss market has become very competitive and even if local wines are good in terms of quality, it is impossible to compete with countries such as France or Spain in terms of price.

Since 2003, the exports have varied between 1,5 and 2,8 million litres annually. The destination countries are various, but European countries are ranked at the top. Germany comes first (0,49 million l) followed by France (0,27 million l), United Kingdom (0,2 million l) and Netherlands (0,2 million l); then the geographical area extends with Hong Kong, Belgium, Japan, China, Italy, USA, Spain and Austria (Appendix 1.2.2). On the following figure, the comparison between exports by volume and exports by value is shown. Surprisingly, the countries to which Switzerland exports most are often not the ones with the highest exports' value.

Figure 3 - Swiss Wine Exports (Volume and Value)



Source: Comtrade 2014

[7] 1 hl (hectolitre) = 100 litres

With only 7% of the total volume, but 30% of the value, the wine exported in Hong Kong is situated in a high price range. By comparing the two figures, it is possible to estimate the price ranges for the different countries. Germany, ranked first in volume, does not even appear on the top list for the exports by value. From a country to another, Swiss wines are positioned in very different price ranges; the lower price wines are sold on the German market whereas the premiums ones are sold to Hong Kong. Swiss wine exports in places like Hong Kong have been increasing spectacularly for the past 5 years, so the question is to know if the positioning on countries such as Germany should not be reconsidered.

In the end, the company looks more at value rather than volume, so it seems much more profitable to export on market such as Hong Kong or China than Germany.

1.2.4 Promotion

Different wine associations and organisations have emerged in the past few years in order to promote the Swiss wine abroad. One major weakness of Swiss wines is the lack of awareness; in fact, Swiss wines are poorly known around the globe, so Swiss producers should work on turning that trend. With wines from foreign countries increasing shares in Switzerland, Swiss producers have no choice, but to develop their wine sales on other markets (Anguelova 2014). The consumption per capita is decreasing as well, so this is an incentive for Swiss producers to sell abroad. In 2014, the total consumption of wine decreased by 2.8% (1.7% for white wines and 3.3% for red wines) and as a comparison, the consumption of domestic (Swiss) reds decreased by 8.8%, so Swiss wines are losing market shares at the expense of foreign ones (Swiss Statistics 2015).

According to Buss (2013) exportation has never been an obligation for winemakers in Switzerland, however, they now realize that the conjuncture is changing and export offers new opportunities.

More and more events are organized in countries all over the globe in order to expand the customer base. For example the OVV[8] is travelling every year to Japan in order to promote their wines. In 2013, more than 150 importers and journalists were invited in Tokyo to taste what is produced in the Canton de Vaud. Also the IVVS[9] is willing to increase the exports up to 5% of the national production in 2020 (Buss 2013).

[8] Office des Vins Vaudois (Bureau for wine from Canton de Vaud)

[9] Interprofession de la vigne et des vins suisses (inter-branch organisation for Swiss wines and vineyards)

Another important association is the SWEA[10], this Cooperative Society is looking forward to promoting the image of Swiss wines abroad and easing the exports (SWEA 2015).

One of the roles of the SWEA is to organize the export projects between wine producers and the OFAG[11]. For example, when Uvavins wants to set up a stand for the ProWein fair in Düsseldorf, the cooperative applies for a sponsorship. If the export project is accepted, the OFAG covers 50% of the costs. For a project to be accepted, at least three producing regions have to be represented, so for example when there is one producer from Valais, there should be one from Vaud and another from Geneva.

Swisswine is another promotion agency with similar goals than the SWEA. These two entities are currently looking forward to merge. Swisswine recently hired a famous graphic designer in order to renew its visual identity. The agency has a stand at the ProWein fair in Germany in order to promote Swiss wines.

[10] Swiss Wine Exporters Association

[11] Federal Bureau of Agriculture

1.3 The German Wine Industry

1.3.1 Introduction

Like many other consumption goods, the wine industry is subject to change in tendencies and it is hard to predict how this will evolve in the future. Globalization has had quite an impact on the wine segment for the last 20 years: exchanged volumes are increasing and production is decreasing. Etienne Montaigne wrote 15 years ago "the consumption of wine linked to eating habits, is evolving very slowly, except under passing fad and opinion of fear about health benefits. Wine consumption is the image of eating habits shaped by history and culture" (Montaigne, Martinm 2001: 103-106). These sayings seem to be still accurate and relevant when looking at Germany where the consumption of wine differs a lot from some of its neighbour countries such as France or Italy.

Uvavins is willing to continue increasing its activities abroad, especially on the German market. A special focus is required on this country as it is now facing various and very different challenges. The German market is very interesting for the wine industry and it is full of opportunities; however, these opportunities do not fit to all types of wines. German consumers are price sensitive and do not appreciate wine as people do, here in Switzerland with a strong French influence. According to the Herrmann (2012), the consumption of wine in Germany often takes place for the aperitif. German people do not always consume it with a meal, but they do appreciate smooth and sweet wines. On top of that, it seems that German consumers would buy many bottles at a time if they like it (it is a common thing to buy a 12 bottle case in a supermarket). According to Ammerman (2013):

"Although not a traditionally wine-drinking nation in the manner of France or Italy, over the last 20 years wine has become firmly established as an integral part of personal and business consumption."

Despite the fact that Germany has been hit hard since the financial crisis, the German market, with its 82 million inhabitants, is significant for the wine industry. It is a large and mature market with an impressive number of players. It makes this market very competitive, but quite concentrated (distribution aspects are developed under point 1.4.6).

1.3.2 Production and Consumption

In 2013, the wine production amounted to 800 million litres in Germany. Unlike some EU countries, the production did not fluctuate much for the last 20 years. In Italy, France or even Portugal, the production tremendously decreased between 1990 and 2013: 18%, 36% and 40% respectively (Appendix 1.3.1). Climate change is the main reason explaining such decreases. The phenomenon has been especially observed in regions experiencing cooler winters and hotter drier summers. Wine grapes are very sensitive to shifts in temperature, rain and sunshine (Goldenberg 2013). Germany is therefore less concerned with its northern geographic situation. The other reason to explain the decrease in production is the European policies encouraging wine growers to stop producing wine. The aim was to "turn wine surplus from a bumper crop into fuel and industrial alcohol" in order to "grubbing up low-quality vines" (Minder 2005). With money as an incentive, some growers decided to follow the policy.

About 140 varieties are grown in Germany, among which there are very different profiles due to climatic factors. There are 13 wine regions producing a majority of white grapes (about 60%). The valley of the Rhine, the Mosel, the Main and Ahr accounts for eleven regions in the western part of the country. The two remaining regions, Saale-Unstrut and Sachsen are situated a little up west. The vineyards benefit from a mild climate and are mostly located on steep slopes with a southern orientation (Zhang 2012: 2-11).

The production is, like in Switzerland, dominated by a few grape types such as Riesling, Müller-Thurgau or Pinot noir (Wines of Germany 2015). As wine is highly influenced by weather conditions, neighbour countries like Germany and Switzerland have some similarities in their production. For example, Pinot (Burgunder), Silvaner and Müller-Thurgau are part of the main varieties in both countries. Despite the importance of certain varieties, the German production is more equally distributed than that in Switzerland.

Table 2 - German Varieties

Reds	Whites
Pinot Noir/ Spätburgunder (12%)	Riesling (20%)
Dornfelder (8%)	Müller-Thurgau (13%)
Portugieser (4%)	Silvaner (5%)
Trollinger (2.5%)	Pinot Gris/Grauburgunder (4.5%)
Regent (2%)	Pinot Blanc/Weissburgunder (3.6%)
Others (72%)	Others (54%)

Source: Wines of Germany 2015

Germany is one of the most important wine markets in the world. With the highest GDP ($3.73 billion in 2013) within the European Union, Germany has been a major actor of the industry for quite a few years now. The Appendix 1.3.2 shows a per capita consumption of 21.1 litres, so it is lower than Switzerland, but in total volume (i.e. number of litres consumed) Germany is the 4th largest market in the world after the US, France and Italy. The Appendix also shows that 54% of the wine consumed is red, 36% is white and 7% is rosé. The consumption of the different varieties will influence the imports in order to respond to the demand. Another important information appearing on this appendix is the ranking of consumers' profiles: 1 star for new (amateur) consumer, 2 stars for experienced consumer and 3 stars for specialists. Germany has 3 stars, which ranks them in the same category as Austria, France, Italy and Switzerland (among others).

1.3.3 Imports

The wine industry is still dominated by domestic products, however, almost half of the wine comes from import. According to Zhang (2012) "Germany represents 13.3% of Europe's total wine market by value, ranking third behind France (19.4%) and Italy (22%)". Germany is ranked at the top in term of value and has experienced decreasing volumes.

Figure 4 - Top Wine Importers

Top wine IMPORTERS - 2013
Source; Data form GTA /ellaborated by OeMv

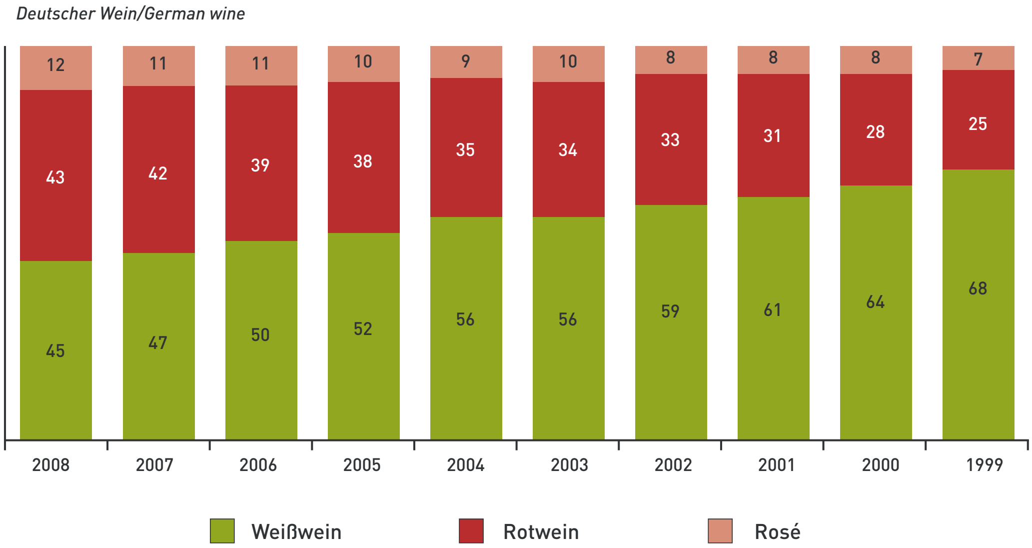
Country	VALUE (€)	Chg 12-13	Country	VOLUME (liters)	Chg 12-13
USA	3 946.8	0.3%	Germany	1 500.2	-1.7%
UK	3 731.9	-5.2%	UK	1 303.2	-0.7%
Germany	2 514.5	3.8%	USA	1 096.6	-6.0%
Canadá	1 523.7	-1.1%	France	524.1	-11.0%
China	1 170.7	-4.8%	Russia	492.2	1.6%
Japan	1 155.8	-4.0%	China	376.6	-4.4%
Netherlands	881.7	-0.6%	Canadá	372.9	-1.0%
Swtizerland	949.2	2.9%	Netherlands	366.7	3.0%
Russia	911.8	11.9%	Belgium	314.0	0.2%
Belgium	975.8	1.5%	Japan	263.2	2.4%
Denmark	545.5	7.6%	Sweden	207.7	2.0%
France	648.3	3.6%	Denmark	201.7	7.0%
Sweden	590.4	7.9%	Switzerland	182.8	-2.9%
Others	5 698.5	4.1%	Others	2 217.2	4.0%
TOTAL IMPORT	**25 244.5**	**1.0%**	**TOTAL IMPOR**	**9 419.2**	**-0.7%**

Source: OIV 2014: 9-14

On the figure, Germany is one of the only top importers to have an increase in value (3.8%) between 2012 and 2013, but a decrease in volume (1.7%). Still ranked number one in volume, Germany is importing less bottles, but at a higher price. Another fact about wine consumption is that German people tend to drink more red wine each year. Since 2000, the balance reversed and German people started drinking more red than white wines, it has continued this way since then (Zhang 2012: 2- 11).

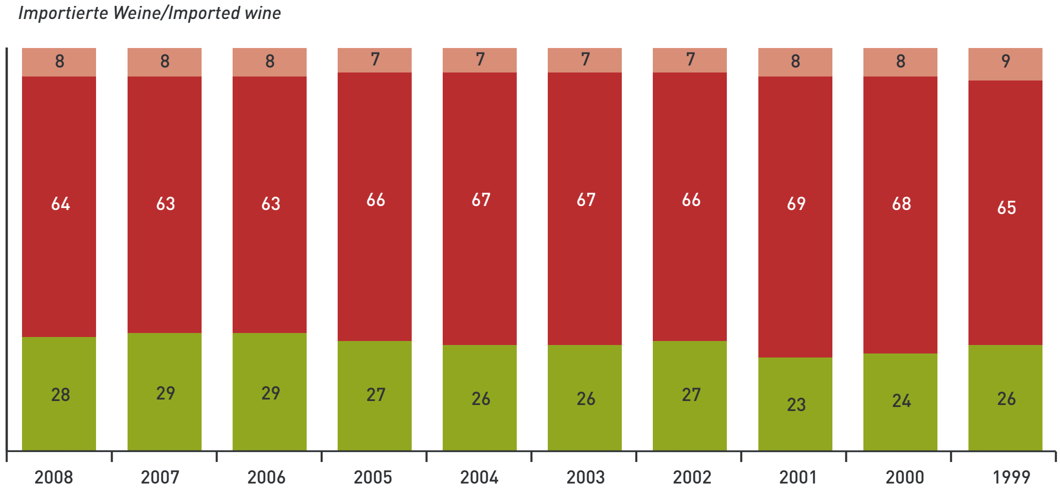
On the following figures, the buying trends of German and imported wines:

Figure 5 - Consumer Buying Trends of German Wines by Type (in %)



White wine Red wine

Figure 6 - Consumer Buying Trends of Imported Wines by Type (in %)



Source: Zhang 2012: 2-11

It means that the red wine lovers have been consuming imported reds for a while and the increase in consumption of red wines is compensated by a shift in domestic production. Therefore the imports proportions have remained stable and German people have been increasing their consumptions of domestic reds. White wines are very popular in Germany, so the consumers of red wines always had to look for foreign bottles (it explain the 65% of red wine in total imports). These figures show data until 2008, however, buying trends have continued following the same path.

According to Euromonitor (2014): "The main import countries remained Italy, Spain and France, which together accounted for over two-thirds of imports' total volume in 2012. These origins are particularly popular with regards to still red wine". In 2012, a country like France exported 264 million litres of wine to Germany and Switzerland exported 500,000 litres (Appendix 1.3.3). The exports from Switzerland were especially low in 2012 compared to 2007-2011 were it was 700-800,000 litres. The value of Swiss exports decreased accordingly and was around € 4.4 million in 2012 (Appendix 1.3.4). Again by comparison to France, the value per litre of Swiss wine is higher:

- France: 264 million litres worth € 679 million = 1 litre is valued at € 2.6
- Switzerland: 500,000 litres worth € 4.4 million = 1 litre is valued at € 8.8

It is not possible to compare the market opportunities of the two countries. In the Euromonitor report, the wine market is split into 6 price categories:

- Under €0.99
- €1 to €1.49
- €1.5 to €1.99
- €2 to €2.99
- €3 to €4.99
- €5 and above

By reference to this report, Switzerland is working mainly on the higher price category. These categories are representative of the German market. More generally, when segmenting wine by retail price, the following categories are used (Phillips, Özer 2012):

- Economy: €4 and below
- Popular: €4 to €7
- Premium: €7 to €13
- Super Premium: €13 and above

Swiss wines are in the segment called "Premium". It is easier to categorize a country like Switzerland due to the relatively low amount of exported wine compared to a massive player like France. The category Premium is quite representative of the exported Swiss wines in general.

1.3.4 Industry Premiumisation

In 2014, Philip Oltermann wrote in the Guardian "Germans lose their taste for beer as drinkers increasingly switch to wine". Beer consumption has been declining for several years and German people become more concerned about their consumption habits. Craft beers such as IPA or Bavarian Märzen pale lager are getting more popular over conventional beer. So, beer and wine markets are following the same tendency of "premiumisation". The Euromonitor reports (2014) mentions that:

"Sales through specialist retailers continue to rise as consumers increasingly appreciated the selection of premium wines available in these outlets, as well as the advice and expertise offered by trained staff".

This phenomenon of premiumisation is also reinforced by other factors. For example, retailers of low-end wines (hard discounters such as Aldi) have adapted their range of products and now offer a selection of premium wines. To strengthen their new position, they follow the path of specialist retailers and offer more information about the origin of the wines, a special packaging etc.

Then another factor is the implementation of the new EU-organic-logo. Since 2012 organic wine producers are allowed to use a specific label and this gives a certain status to these productions. "In accordance with the health and wellness trend, organic wine continued to grow in popularity among German consumers in 2013" (Euromonitor, 2014).

Wines are qualified according to their quality. Definition according to Wells (2012):

"Table Wine is divided into two categories: Deutscher Tafelwein (lowest category) and Landwein (introduced in 1982 and equivalent to French Vin de Pays). Quality Wine (Qualitätswein) is also divided into two categories: Qualitätswein bestimmer Anbaugebiete (QbA) and Qualitätswein mit Prädikat (QmP)"

So, the Table Wine is the one with the lowest quality, then comes QbA classed as the first quality wine and then QmP classed as the finest one.

Figure 7 - Sales of Still Wines by Quality Classifications, % Total Volume 2008-2013

Table 16 Sales of Still Red Wine by Quality Classification: % Total Volume 2008-2013

% total volume	2008	2009	2010	2011	2012	2013
Quality wine (QbA)	68.3	68.0	68.1	68.2	68.3	68.4
Quality wine (QmP)	9.7	9.9	10.0	10.1	10.2	10.3
Table Wine	22.0	22.1	21.9	21.7	21.5	21.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Sales of Still White Wine by Quality Classification: % Total Volume 2008-2013

% total volume	2008	2009	2010	2011	2012	2013
Quality wine (QbA)	79.4	79.6	79.6	79.6	79.5	79.4
Quality wine (QmP)	9.0	8.8	8.9	8.9	9.1	9.2
Table Wine	11.6	11.6	11.6	11.4	11.4	11.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Sales of Still Rosé Wine by Quality Classification: % Total Volume 2008-2013

% total volume	2008	2009	2010	2011	2012	2013
Quality wine (QbA)	67.8	67.9	68.0	68.1	68.2	68.3
Quality wine (QmP)	8.7	8.5	8.6	8.7	8.8	8.9
Table Wine	23.5	23.6	23.4	23.2	23.0	22.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Source: Euromonitor 2014

In 2013, German consumers show a preference for quality wines (red, white and rosé). Quality wines account for 79% of red, 88% of whites and 77% of rosé. From 2008 to 2013, the percentages have slightly fluctuated: in general, the Table Wine category lost some shares and the QmP gained some. In Germany, the quality of the wine is the most important factor influencing the purchasing decision. The average unit price of wine has been rising in Germany due to two main reasons; first the German consumers tend to sacrifice quantity over quality. Second, the production costs, raw material and transportation costs are higher (Euromonitor, 2014).

1.3.5 Distribution

The sales of wine can be split into two main categories, the off-trade and the on-trade (also called off- and on-premise). The first one refers to sales from wine shops, retailers and supermarkets while on-trade refers to sales from restaurant, bars and hotels. In Germany the off-trade channel accounts for more than 80% of the sales in volume. However, the off-trade only accounts for 45% of sales in value (Appendix 1.3.5). According to the Euromonitor report (2014):

“German consumers enjoy drinking wine with or after dinner, and have a strong preference for investing in a good bottle for home consumption rather than paying premium prices for possibly mediocre wine in on-trade establishments.”

For the on-trade channel, there exist wholesalers that have a distribution network with many restaurants and work with important volumes. As it includes an additional intermediary, margins are reduced and this is a very competitive environment as wholesalers have an important bargaining power with suppliers. The other solution is to visit the restaurants one by one and try to convince them to buy our wine instead of others. This is a time consuming alternative however, but can be very interesting when it works. Wine's popularity has risen in restaurants and bars and some wine bars have emerged recently however:

"Since wines sold via on-trade channels still have a high mark-up (of around 3 to 5 times the purchase price), consumers easily switch to off-trade consumption in times of economic downturn" (Chameeva, Zhang 2012: 5-15).

After the 2008 crisis, the share of still wines dramatically declined in the on-trade channel. About 19% decline in 2008, 16% in 2009 and another 15% in 2011. Presently the economy is beggining to recover and sales in the on-trade are expected to start increasing again (CBI 2014).

The off-trade channel is divided into subcategories. The market is quite fragmented between the different retailers. By comparing the importance of outlet types in volume and in value, it is possible to visualize the weight of each channel:

Table 3 - Off-Trade Wine Sales in Germany

Retail outlet type	**% of total volume**	**% of total value**
Discounters	47%	32%
Direct sale	17%	22%
Supermarkets	25%	22%
Specialists	10%	20%
Internet and mail	1%	4%

Source: Zhang 2012: 2-11

Small wine growers dominate the wine sector in Germany, and these growers are usually members of cooperatives. As a result, about a third of total wine production comes from cooperatives and the majority of it is sold directly to consumers (Chameeva, Zhang 2012: 5-15). This explains the weight of "Direct sale" in total off-trade sales.

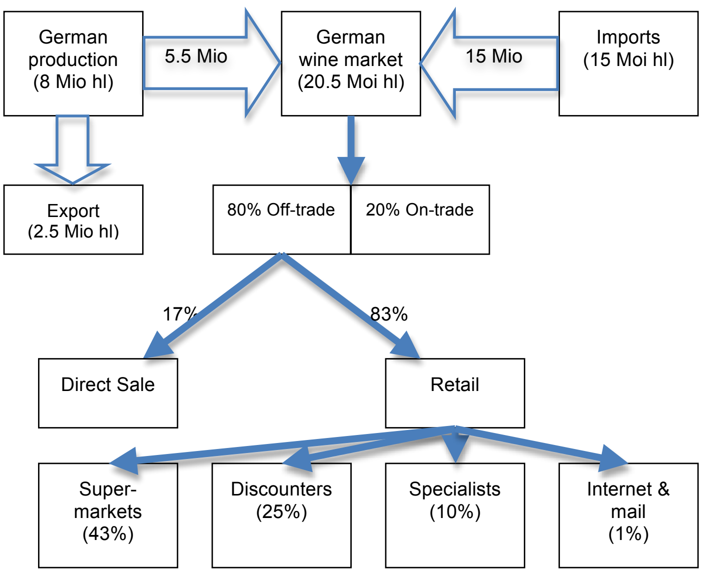
Germany is the discounters' kingdom and the wine market is strongly impacted by it. With almost 1 bottle out of 2 sold through discounters, the other channels have no choice, but to share what's left. Nevertheless it is interesting to observe that the specialists (specialized wholesalers selling mainly to restaurants) and the direct sale accounts for an important share of the total value with relatively low volumes. Consequently it is possible to define two distinct pricing strategies (Zhang 2012: 2- 11):

- Lower pricing strategy: Discounters sell mainly wine in the price segment €0.99-€3.49 while supermarkets in the segment €2.39-€5.99. The wine is usually sold either in bottles or in a larger pack.

- Higher pricing strategy: Specialists and direct sale mainly sell wine in the price segments €3.49-€12. While specialists are often focused on imported wines from a specific country, the direct sale depend largely on purchases from tourists. The Internet sales are less significant in term of volume, but reflect a demand from customers looking for high quality wines.

Hence each price segment correspond to a certain retail channel; under point 1.3.3 (Imports), the estimation of a litre of Swiss wine was €8.8. So, Swiss wines, clearly in the highest price segment, will be marketed in the corresponding distribution channels: Specialists and Internet (as direct sale only concerns domestic wine). The Appendix 1.3.6 is detailing the importance of the different off-trade price segments. Red wines priced at €5 and above represents 5.7% of the total volume, and white wines 5.5%.

Figure 8 - Distribution Map



Source: Data from 1.3.5

The distribution map was elaborated with the data discussed above. It shows the share of each distribution channel in volume (number of litres). In term of value, it is very different. The price strategy of each distribution channel is unique, so the price of a bottle of wine will fluctuate accordingly.

On the retail market, the average price of a litre of German wine is €3.48 (€2.61 for a bottle) and a litre of imported wine in Germany is €2.97 (€2.23 a bottle). However, when it comes to direct sale or specialists, the average price for a litre of wine is €5 and above (Chameeva, Zhang 2012: 5-15). Finally, for the on-trade market, the average litre of wine in a restaurant is €30 (€25 a bottle) (CBI 2014). There is a huge gap between those price ranges, and this is a good indicator when trying to market Swiss wines with a relatively high price.

1.4 Uvavins - Cave de la Côte

1.4.1 Uvavins Switzerland

Uvavins - Cave de la Côte is the mother company regrouping Cave Cidis and Cave de La Côte. Cave Cidis is distributing wines to individuals, cafés and restaurants whereas Cave La Côte deals with wholesalers and retailers. In 2014, the revenues from the different activities of Uvavins amounted to slightly less than CHF 32 million (Appendix 1.4.2). For the last four years, the turnover has been relatively stable (plus/minus 10%).

However, the revenues from exports have been skyrocketing in that same period with an increase of 146% between 2011 and 2014 (Appendix 1.4.3). Exports still represent a minor part of Uvavins' business, but the numbers are promising. Of course, a single new contract can make the figure vary tremendously, but since 2011, the activities are on the rise. Last year, the most important market for exports were:

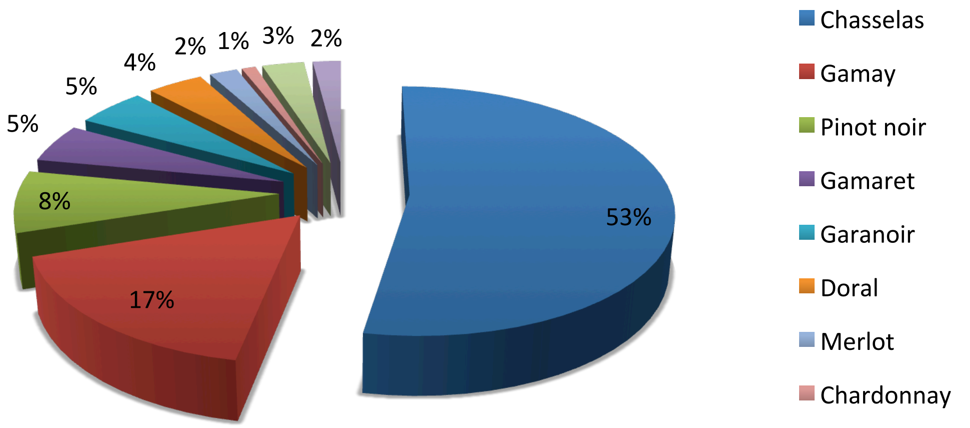
- Japan with sales amounting to CHF 97,323
- Germany with sales amounting to CHF 90,806
- China (excluding Hong-Kong) with sales amounting to CHF 22,056

The Appendix 1.4.3 highlights the impact of the implementation of an employee directly on the German market. Except Japan, no other country experienced a significant upward trend over the period 2011-14. Uvavins is willing to increase its activities abroad, but the company does not have a proper export strategy yet. Each country has its own specificities and Germany is the only country with an employee working full time for Uvavins on the field.

Even if the exports represent a little portion of the overall revenues, from 2011 to 2014 their share of the annual turnover more than doubled (0.3 % to 0.75%). Uvavins is gaining more and more experience on the export market and it will be significant when the share of exports reaches 2, 5, and then 10% of the revenues.

On both domestic and export markets, Uvavins - Cave la Côte is selling an important amount of different wines. When exporting, the customers' tastes vary a lot from one country to another; some people may like a less tannic, sweeter wine. The German market is quite close to the Swiss wine in term of taste because German wines have more acidity.

Figure 9 - Uvavins' Sales per Grape Variety



Source: Uvavins 2015

The pie chart shows the share of each variety out of the total; Chasselas is, by far, the number one sold variety for Uvavins. The region of La Côte is producing more white wines and therefore the share of whites over reds is 57/43. Uvavins is producing and selling 29 varieties, but the pie chart shows that 8 of them represent 95% of the sales.

In Switzerland, Uvavins has developed an E-shop for Cave Cidis, the entity selling to individuals, cafés and restaurants. The Internet platform provides special offers, advice, information about events and gift boxes. The website is a good complement to the usual shop and an interesting alternative to the traditional method of shopping for wine. For the last three years, the sales trough the E-shop amounted to:

2012	2013	2014
CHF 33936.11	CHF 54931.01	CHF 78568.15

Source: Camandona 2015

Online sales represent a low share of the total revenue, but, as we can see, Internet is rapidly growing as a distribution channel. Even if online sales aren't one the company's main revenue centre, the online presence is important and the website help increase Uvavins' visibility.

1.4.2 Uvavins Germany

Since 2012, Uvavins opened a German entity called “Cave de la Côte”. Klaus Immes is the only employee working there and he’s managing the entire process from the marketing to the sale. The definition of his role is therefore quite wide and Klaus is free to undertake whatever actions he considers profitable for the business (within its budget’s limit).

Several medals won in wine tasting competitions highlighted the year 2014. For example the Emblem Sauvignon Blanc and the Emblem Doral were the winners of a gold medal at both Mundus Vini and Berliner Wein Trophy. Such prizes are crucial when building a reputation and image for Swiss wine abroad. Thanks to the work of the Uvavins’ oenologists, Cave de la Côte was able to promote prize-winning wines in 2014.

The Emblem Sauvignon Blanc and Emblem Doral with the Gold award at Mundus vini.

The German competition offers an international recognition and attracts wine professionals from all around the globe.

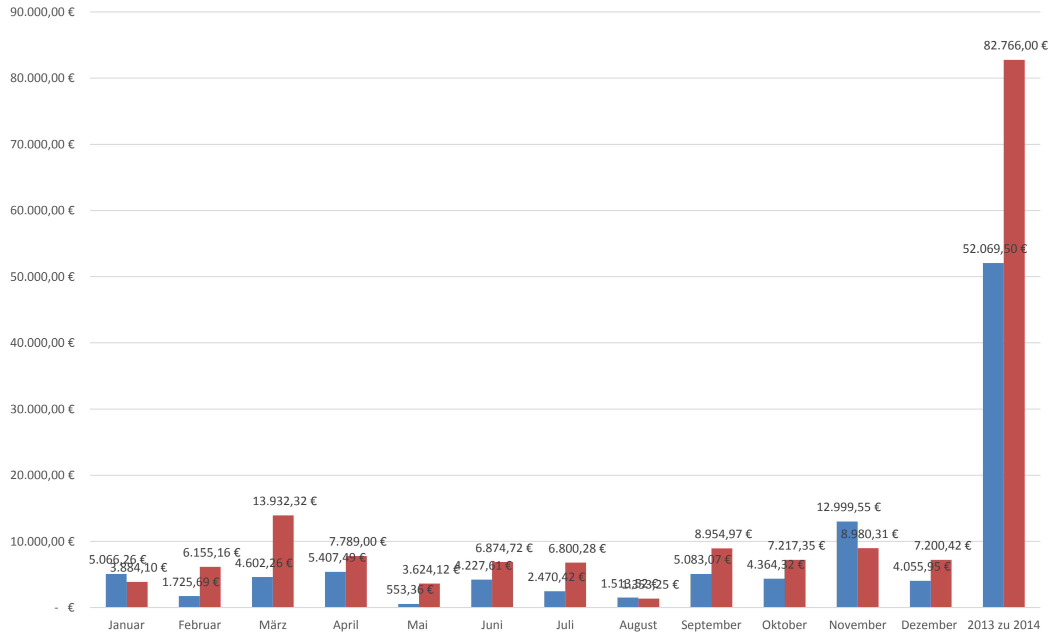
Winning such an award brings recognition and visibility. Mundus vin even has a stand for fairs such as ProWein in Düsseldorf.

Source: Appendix 1.4.4

To increase the brand awareness and sales, the German entity goes though different promotion axes. Wine fairs are efficient in order to meet customers such as specialists or wholesalers; this axe is very important, as the traded volumes are higher. Promotion stands are also used during diverse events such as the Rolex Grand Slam of Slow Jumping in Aachen. On top of that, the company Weinwerk (property of Dr. Oetker Group) started selling two wines from the Cave de la Côte’s assortment[12]. At first, these wines are going to be sold in three supermarkets called “Frischeparadies Märkten” (Appendix 1.4.4).

[12] Papillon Chasselas (Romand VDP) and Gamaret (La Côte AOC).

Figure 10 - Sales Revenue Comparison 2013/14



Source: Appendix 1.4.4

The sales figure shows the evolution between 2013 and 2014, the yearly revenue increased by 58% in 2014. New partnerships with companies, such as Weinwerk play an important role in these positive figures. Such an increase is a very promising sign for the business. Indeed, after the 2008 crisis and the numerous scandals related to hidden bank accounts and so on, the image of the country was affected. The responsible for the German entity of Uvavins, explained during the interview that sales from Swiss products were affected accordingly.

The activities of Uvavins in Germany were expected to be more profitable and the Swiss company expected a quicker return on investment. However, after setting the infrastructure in Germany, Uvavins realized it would take more time due to the slow economic recovery, the image of Switzerland and the high level of competition (Appendix 1.4.4). On top of macroeconomic factors, the growth of the business is also limited by Klaus Immes' choices.

As the only employee on the field, he's not able to dedicate all of his time in looking for new partners or developing promotion plans. His main tasks are (Appendix 1.4.1):

- Sales prevision and order of wines to fill the German stock
- Development of new partnerships
- Invoicing and accounting for the German entity
- Decision and implementation of promotion campaigns
- Organisation and presence on the stands for the wine and gastro fairs
- Responsible for some of the deliveries

So, the German responsible has to allocate his time to this long list of tasks and cannot be fully dedicated into looking for new growth opportunities. The size of the activities does not justify the presence of a team abroad. There are two reasons for having an employee across the border: Germany is, in volume, one of the most important markets for Uvavins and, second, the Swiss company was unable to find a reliable and effective agent to work with on the German market (Appendix 1.4.1).

By being the only country with an employee on the field, Germany is a trial market. For now, no plan has been made in placing an employee in another country. On top of that, the sales manager explained that (Appendix 1.4.1): " If we have good importers in a country and it works well, we do not really need an employee on the field. For example in Japan we have a good importer and it has become a kind of a small Uvavins' branch there". So, an employee on the field is not a necessity, but Uvavins is willing to continue as such.

1.4.3 Product Range

An assortment of wines has been chosen by Klaus Immes for the German market. The list has been made according to what he judged as interesting for this specific market. Therefore the assortment was composed based on his own experience and knowledge of the market. During the interview, the Swiss director of sales said (Appendix 1.4.1): "Our employee chose a large assortment to begin and he may narrow it in the future according to what has been sold well and what hasn't".

As a result, the product range is composed of 34 wines divided into 9 collections (detailed list available in Appendix 1.4.5):

- **Basic & Swissness**: This collection offers typical Swiss wines such as the Chasselas Romand Papillon or the Pinot Noir Swissness. The collection contains 2 white, 1 rosé and 2 red wines with a price from €4.45 to €5.35 a bottle. This is the collection offering the lowest prices with wines from the "Popular" segment[13].
- **Tradition**: This collection also offers typical Swiss wines, however, with some more specificity. Out of the 4 suggested, there are the Chasselas Vieilles Vignes or the Baril Cuvée Spéciale. Prices go from €6.45 to €8.45, so this is a collection between the "Popular" and "Premium" segments.
- **Premier Grand Cru**: The Château Malessert, Premier Grand Cru, is the only wine in this collection. This is a higher end wine priced at €12.85. This wine is right at the border of the "Super Premium" segment and in the German assortment of Uvavins, this is clearly in the top products.
- **Collection Expression**: The collection offers more sophisticated wines. The quality and prices climb gradually higher from the Basic & Swissness, Tradition and then the Collection Expression. With prices between €9.45 and €10.95, the Doral Expression and the Gamaret are part of the 5 wines offered in this "Premium" collection.
- **Collection Bernard Ravet Premium**: The well-known Chef, Bernard Ravet, helped compose this collection with 4 wines such as the Pinot Blanc or the Gama-Belle Gamaret.

[13] Category name referring to: *The Oxford Handbook of Pricing Management by Phillips and Özer (2012).* Discussed under point 1.3.3.

- With prices between €11.45 and €18.95 the majority of this category is part of the “Super Premium” segment.
- **Mousseux – vin**: There are 2 sparkling wines in this collection; the Bleu Nuit and the Auguste Chevalley priced both at €9.95.
- **Seeuferregionen Waadt & Valais**: This “Lakeside Vaud and Valais” collection offers 4 wines from the city of Morges and 2 from Valais. This is a special category from Morges, which is the home of Uvavins. The two wines from Valais are added to offer something from another part of Switzerland. Prices range from €5.45 to €6.45, which makes this collection part of the “Popular” segment.
- **Design Collection Empreinte**: The name of this special collection is only used for one Chardonnay and one Merlot. Both are in the “Premium” segment with a price of €9.75.
- **Collection Emblem**: Like the previous one, this is a special collection under the name “Emblem”. A group of 5 wines priced between €6.45 and €6.95 composes this collection. Emblem Doral, Emblem Pinot Gris or Emblem Merlot-Gamaret are part of it. This collection is between the “Popular” and “Premium” segments.

The product range is wide and it is not always easy to differentiate one product from another. In terms of price, all the segments are represented in both red and white wines. Without the advice of a specialist, it may be very difficult to understand the distinctions between the different wines, so the prices become sort of the only reference. Prices are adapted to the German market with a difference of 15-20% compared to Swiss prices.

The assortment is composed of “representation wines” such as the ones of the Basic & Swissness collection. These wines have a lower price range and offer a first taste of what is produced in Switzerland. Secondly, there are wines from a higher range and more specific ones that are both in a higher price scale, for example the Collection Expression or the Collection Emblem. Then, there are some outsiders such as the sparkling collection or the wines from Valais. Finally there are wines from the “Super Premium” segment in another price category such as the Collection Bernard Ravet or the Premier Grand Cru.

1.4.4 Distribution and Marketing

Different distribution channels are available with each having their own characteristics. In 2014, the sales in Germany were divided as the following (Appendix 1.4.4):

- 40% Direct Sale
- 25% Specialists
- 15% Supermarkets
- 15% Wholesalers
- 5% Restaurants

Direct Sale

As Uvavins does not have a shop in Germany; the direct sales are made mainly through wine fairs. ProWein in Düsseldorf is one of the major fairs where a lot of sales are concluded. On the one hand, fairs are a showcase and become a good place to sell. And at the same time, this becomes one of the best places to meet the customers, educate them about Swiss wines and learn more about their tastes and expectations.

Fairs have proven to be interesting places to market Swiss wines and usually, Uvavins would set a stand for the Berlin, Düsseldorf and München fairs. For 2015, the strategy changed and two "gourmet food" fairs will be attended instead of München. These substitute fairs are more oriented towards fine food and drinks and the people attending them are closer to what Uvavins is offering in Germany. The environment in these two events allows a more personalized approach and this is especially interesting with Specialists. Fairs are therefore profitable for both direct sale and specialists channels. Advertising in a magazine called "Schweizer Revue"[14] helped increase the number of direct sales as well. However, Uvavins was not satisfied with the placement of the advertisings in 2014 and has decided not to repeat the operation in 2015.

Specialists

When analyzing the distribution in Germany (point 1.3.5), the importance of specialists was already highlighted by their 20% share of the total value of distributed wines. For Uvavins, specialists are one of the top priorities for the future.

[14] The English equivalent would be "Swiss Magazine"

Swiss wines can really benefit from this channel offering more expertise to the final consumers compared to an ordinary wholesaler.

Fairs are the best way to get in touch with specialists and Uvavins will have special focus on this channel in the near future. When meeting the potential customers, Uvavins is able to explain their product and distribute brochures as a complement.

Supermarkets

For Uvavins, this is a growing channel to sell their wines; partnerships with supermarkets such as CITTI or the newly concluded one with Frischeparadies Märkten are crucial. This is a very competitive environment because price is one the main incentives. In order to increase the product awareness and boost sales, Uvavins designs posters that aim at informing the end consumers.

Wholesalers

The notion of wholesaler did not appear under point 1.3.5, when the distribution on the German market was approached. This is due to the fact that wholesalers do not sell to final consumers, so they do not appear as part of the distribution channel. One of the principal wholesaler Uvavins is selling to in Germany is called “Chefs Culinar”, a major player dealing with more than 20,000 food and non-food products. Chefs Culinar is selling mainly to hotels and restaurants.

Restaurants

This channel only represents 5% of the sales for Uvavins in Germany. This could be explained by the fact that prospection is time consuming and it is not possible to quickly develop its network with a single employee in the country. Even though this is not one of the major channels for Uvavins, the potential of this channel is very high. With the trend of German people going back to restaurants after some years of economic downturn, Swiss wines may grab some market shares.

1.4.5 Competition

The wine market is composed of a very wide range of consumers, from the occasional amateur drinker to the frequent and expert drinker. For all of them, differentiating a wine from another will be difficult when facing a shelf with dozens of bottles. The competition is very intense and this is why the price factor plays such a big role.

According to the consumer's profile, Swiss wines will be competing with wines from a certain region or with certain characteristics, but, in general, Swiss wines are competing with every other wine. The type of wine Uvavins is selling in Germany is first, generally more expensive than the competition and second, more dedicated to informed people.

Table 4 - Comparison of the Wine Consumption in Selected Countries

Countries	**Red wines**	**White wines**	**Rosé wines**
Switzerland	61%	25%	14%
China	59%	23%	9%
Germany	54%	33%	13%
USA	50%	36%	15%
Australia	48%	44%	8%

Source: Resnick, Roany 2012: 10-11

Table 5 - Wine Buying Criteria in Selected Countries

Countries	**I regularly like trying different wines**	**I know what I like and keep it that way**	**I buy whatever is cheap**
Switzerland	53%	33%	8%
China	66%	15%	19%
Germany	44%	49%	7%
USA	44%	30%	27%
Australia	32%	39%	19%

Source: Resnick, Roany 2012: 10-11

These two tables help to understand the buying behaviour of the German consumers and there are three main aspects to keep in mind:

- German wine consumers are more red wine orientated.
- Half of the wine consumers have their habits and like to keep them.
- Almost the other entire half is willing to try new wines.

These figures are promising for Uvavins which sells a wine that can be considered new for German people and not an inexpensive wine; a move into the German market was therefore justified. So, Uvavins has competition on two fronts: for the 49% of German people with wine habits, Uvavins is competing with wine from the same “type” i.e. German wines. Then, also for the 44% of German people who likes change, Uvavins is competing with basically the wines from all around the globe.

Uvavins is a relatively small entity on the German market; it is therefore difficult to set a list of competitors. Swiss wines are mainly marketed through the different cooperatives or international companies, so Uvavins does feel competition from the other Swiss players in Germany. Provins, the cooperative for wines from Valais, has wines from its own region and international companies, such as Schenk are big players with established partnerships, distribution networks and clear strategies. So, the real competition comes directly from German producers and other foreign wines. Among the others, important players and direct competitors on the German market are found:

- **Regional German brands**: There are several small producers in Germany; they sell either directly to consumers or through cooperatives (one-third of the production). They capture important market shares especially on still white wines of good quality. Domestic wine is very popular and has a strong reputation; this comes from the tradition of Germany as a wine-growing country. There is a lot of trust in regional products for taste and quality (Euromonitor 2014).
- **South African wines**: Wines from South Africa and the New World are gaining popularity. With strong promotion campaigns, South African brands such as Distell or KWV have found their segment on the German market. In comparison with Australia, South African wines are closer in style to European ones as African winemakers often study in France (Winex, 2015). The quality of South African wines is going upward, but the main price segment is “Popular”.

- **Premium international wines:** This category regroups the wines from the “Premium” segment coming from different countries. In term of price, they compete directly with Swiss wines, but are often more renowned than the small Swiss producers. It is very challenging for Swiss wines to compete with big brand names that are well perceived by customers.

- **Austrian wines:** This is an interesting category to look at because Austria recently started increasing the promotion of its wines abroad. From the originality of its wines to its higher prices than the competitors, Austrian wines have a lot of similarities with Swiss ones. Typically in the “Popular” segment, Austrian wines have been gaining product awareness and Germany is one of the biggest importers.

- **Italian and French wines:** Imported Italian and French wines are generally in the “Popular” price category; the majority of it is red. One of the main players in Germany is the French brand Les Grands Chais de France SA. Italian and French wines have a long-lasting traditional image on the German market, however, countries from the Old World have been losing market shares during the last few years.

- **Rotkäppchen-Mumm & Henkell & Co:** These two brands have very high market shares (5% and 3% respectively) in Germany, however, this comes mainly from their sparkling wines. Rotkäppchen-Mumm has 5% of market shares in volume and is very popular due to its aggressive promotion campaigns.

- **Aldi & Lidl:** The two discounters account for about 40% of market shares, but have been losing some market shares recently (Euromonitor 2014). They are affected by the premiumisation trend as they are mainly focused on low-price wines. Aldi and Lidl deal mostly with cheap imported wines and base their strategies on volumes instead of value.

1.5 Market Analysis

1.5.1 Introduction

The following analytical tools will help finalize the analysis and help finding the right words to develop the strategic options. In order to get a representative picture, different tools will be used:

- The SWOT analysis will help regroup all the internal and external factors that have been discussed about the market and the company. Also, the SWOT is very useful in understanding where are the areas for opportunities. The SWOT is an assessment of the company and its environment.
- The Positioning Map allows visualizing where the company stands and where it is headed in the future. Unlike the SWOT, the Positioning Map does not provide a static assessment, but more of a picture of the direction the company has to follow.
- Customers' profile aims at looking at the target market and define who are the end customers, why do they buy, what do they buy and where do they buy.
- The 3 Circles analysis will help in challenging the competitive advantages of Uvavins and defining its points of differentiation. The 3 Circles is an interesting tool that provides an objective assessment of the company, the customers and competitors.

The goal, after using those four analyses, is to produce a list of strategic options. The combination of these tools will help reassess the options that come along with this work and also to find new ones. The final list will be composed of the most relevant and promising options.

1.5.2 SWOT Analysis

Strengths:

- Production of red and white wines that fit with the tastes of German people.
- Brand awareness in Switzerland.
- Medal/Prize winning wines (about 20 in the Swiss assortment and 8 in the German one).
- Technical know-how and new infrastructure (production & stock).
- Skilled and experienced employee on the German market.
- Close relationship with promotion organisms (for ex. SWEA).
- Deep knowledge of the OFAG[15] export's operations (how to acquire sponsorship).
- Take good care of its employees/importers on foreign markets (regular visits, attentive listening).
- Pro-active relationships with distributors on the German market (building long-lasting relationship and increasing the level of collaboration).
- Production and commercialization of traditional and exclusive varieties (some being unique in the world).

Weaknesses:

- Lack of product/brand awareness on the German market.
- Limited available resources in Germany with only one employee.
- Lack of structure in the export strategy.
- High production costs comparatively to the rest of the world.
- Too large range of products (cannot please everybody).

[15] Federal Bureau for Agriculture.

- Lack of a clear positioning.

Opportunities:

- Premiumisation trend is interesting for Swiss wines that are positioned in the highest price segment.
- Health and convenience megatrend also drive the German population towards moderate consumption. Drink less, but with a better quality. The healthy effect of red wine only exists with moderate consumption (Germany trade and invest 2014).
- Unit price of wine is expected to slightly increase. This reduces the gap between Swiss and domestic (German) prices.
- Organic wine popularity is expected to grow due to the wellness trend and also after the introduction of the new EU-organic logo (Euromonitor 2014).
- On-trade sales are expected to increase again after many years of decline due to economic downturn (CBI 2014).
- Internet is rapidly growing as a distribution channel. Even if its share is still low, this channel is interesting both for established players and newcomers (Chameeva, Zhang 2012: 5-15).
- The participation in fine food fairs offers the access to new partners that are more food than wine oriented.
- Online sales of premium wines are increasing as consumers are ready to pay more for a less common wine (not available in supermarkets) (CBI 2014).

Threats:

- Discounters and supermarket chains tend to offer more premium wines. This affects the market of specialized shops, especially during the period of economic downturn (CBI 2014).

- Concentration of the distribution channels. Discounters are continuously gaining market shares over the other channels; Swiss wine could therefore lose market potential.
- If the offer becomes too important compared to the demand (for example on premium wine market), the competition is more intense therefore puts more pressure on price. Swiss wines cannot count on the price factor.

The SWOT analysis shows that there are spaces with opportunities for Uvavins on the German market. From its size and available resources, the company is not able to pursue each of the opportunities the market is offering. However, by changing some of the actual practices and focusing on others, it is possible for Uvavins to increase its sales. Uvavins has been present on the German market for about 5 years and has an employee on the ground since 3 years, so the company should have enough experience in order to elaborate a clearer export strategy.

First, Uvavins is not willing to invest a lot in developing its network abroad. It comprehends what exports represent out of their total revenues. So, the company will make trade-offs choices: give up some activities to pursue others more in depth. For example, the range of product the company offers is wide, so the company should focus on a smaller choice of products and remove the duplicates.

Secondly, the German market seems to go in the right direction for Uvavins and its collection of “Premium” and “Super-Premium” wines. People tend to spend more in wine and look for quality; it goes in the direction of Swiss wines attributes. Uvavins, when reducing its product range, could focus more on that segment of the market.

Finally, a special focus on a segment will require a corresponding positioning. Under point 1.5.3, the concept of positioning will be discussed and analyzed in order for Uvavins to be coherent in its strategy.

From the SWOT, the strategic options for Uvavins are the following:

- Take advantage of the premiumisation trend to sell Swiss wines that are more expensive than competitors.
- Use medal-winning wines to increase awareness and boost sales.

- Take even greater care of employees/importers abroad, in order to increase their motivation and to develop the market with new partnerships.
- Take advantage of the increase of online sales to develop an E-shop and develop it as a new channel.
- Use tradition and limited production as an argument to match the health & wellness trend and increase the presence in fine food fairs.
- Focus on a limited amount of distribution channels in order to counter the fact of "concentration of the distribution channels".
- Take advantage of the increase of on-trade sales in order to find new partners that will fit the company's positioning.

1.5.3 Positioning

As of today, the positioning of Uvavins in Germany isn't clear because it hasn't been properly defined. Therefore it is crucial to develop a positioning that can serve as a reference when developing promotion campaigns and educating customers/clients about the wines range.

Of course, with its expertise, the German employee is able to defend the wine and describe at its best. However, the positioning will be at the core of the new strategy and it is fundamental for Uvavins to use the same "guideline" with all the components of its new strategy.

The picture on the right is the one used on the poster developed by Uvavins Germany and sent to distributors such as Supermarkets. The poster is a great tool to provide information about the product and advertise it directly on the selling spot. The use of such promotional tools influences the customer's buying decision and additional sales are generated.

Source: Appendix 1.4.4

In addition, the poster allows passing Uvavins values and sends this message to the customers. This is what the customers will associate Uvavins with their wines.

The message on that poster is the following:

“BOIS GENTIL, the Rosé from the Lake of Geneva.

Gently pressed and a measured maceration. Cuvée of Pinot noir and Gamay grapes.

A light fresh and festive wine. It is so easy to enjoy the summer.

This wine kisses your senses. No risk – pure fun. The wine tip that is different… “

As this is for rosé, the notions of freshness and softness appear and which is not the case for another type of wine. With words like “risk”, “fun”, “easy” and the red lips, the message is a bit of a twist and seems closer to advertising for a soda/juice rather than for a wine.

This message may not be representative of all the messages used on the German market, but it shows the improvement that can be done. How effective is such a message in a supermarket where the bottle is surrounded by competitive ones? This rosé is sold at €6.45 in Germany where the average supermarket price for a bottle of rosé is at €1.83. Only 0.3% of the bottles of rosé sold in supermarkets have a cost higher than €5 (Nickenig, 2013). It is unlikely that the few customers paying this price are looking for fun, to enjoy summer and kiss their senses.

On this second poster, the wine is presented with the details about aromas and focus on its association with cheese meals. German people are important cheese consumers and of course these types of meals are part of both German and Swiss traditions. So, the risk is that German consumers may associate this wine to a typical German wine and this is not what Uvavins wish. It is difficult for consumers to differentiate a wine from another and when the price factor comes into play, Swiss wines are out of the game.

Source: Appendix 1.4.4

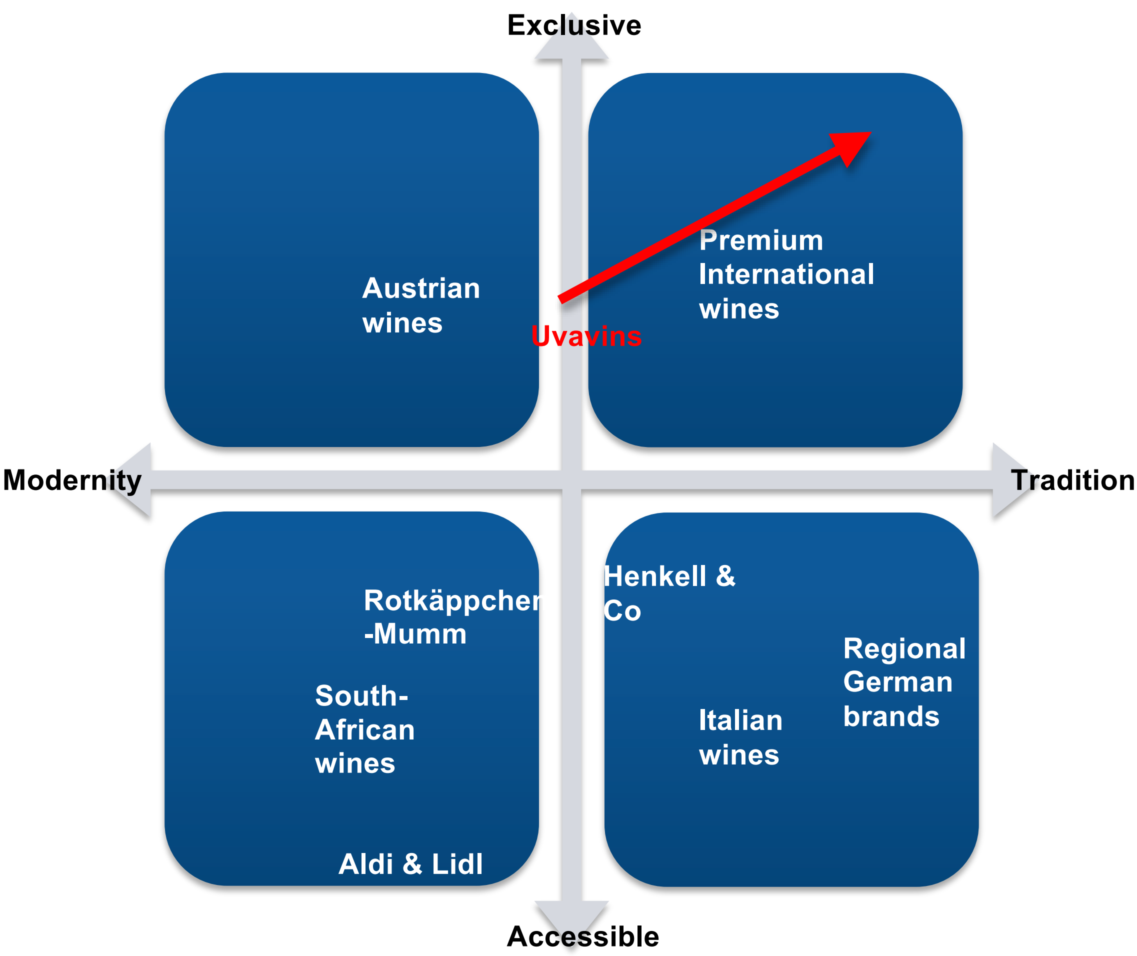
Uvavins could continue with the idea of an original and/or traditional wine, but more oriented towards uniqueness and exclusiveness. For the Positioning Map, tradition versus modernity will be on the first axis; exclusive versus accessible will be on the second one.

Tradition makes reference to the winemaking process, geographical area, the production history of the country and the type of usage associated with the wine. Exclusiveness makes reference to the accessibility of the product, not only in terms of price, but also availability and quantity.

The fact that the product is exclusive will differentiate it from other products, because this is not only about price but also about being part of the very closed circle of people drinking Swiss wine. However, even if this is an exclusive product, the goal is not for the product to be "too unusual". Selling wine is about selling a dream, a story, a culture and a noble product, therefore the traditional side of positioning serve that idea. The production of wine is not a new trend in Switzerland; Swiss producers have developed varieties and vineyards are part of the Swiss landscapes.

In Switzerland, wine is produced in relatively low quantities and on a very local basis, so the nature and environment play an important role. So, wine comes with history and tradition, this will not be removed but highlighted instead.

Figure 11 - Positioning Map



From the Positioning Map, the strategic options for Uvavins are the following:

- Become very exclusive and traditional (follow the red arrow on the above Map): Uvavins is positioned between tradition and modernity and is relatively exclusive due to its limited market shares on the German market. With this clear position, the company will differentiate from its competitors and target on a very specific market.
- Select a limited choice of products: Uvavins has to reduce its range of product to focus on wines that fit with their traditional and exclusive image.
- Communicate accordingly: The development of the new positioning will help in creating a successful brand. Uvavins should rethink its communication strategies and messages in order to stay coherent.
- Differentiation: It is crucial for the customers to perceive value in Uvavins. To do so, Uvavins has to promote the uniqueness of Swiss varieties, the good combination of their wines with fine food and the awards won at Mundus Vini and the Berliner Trophy.

1.5.4 Customers' profile

Customers are influenced by many factors during their purchases, so the idea is to capture those in order to use them as an advantage. Wine is not only about varieties and tastes but also about social allegiance, prestige and image. Wine is a message; the German people willing to pay a price premium for a bottle of Swiss wine want to give a message. In order to better capture customer needs, influences and goals, the target group will be approached on the demographic, psychographic and sociographic aspects. Strategic marketing recommendations will follow and conclude this point 1.5.4.

Demographics

The potential customer for Uvavins' products will be situated in the age group 25-54 years old. This group represents slightly more than 40% of the population and is composed of 17 million males and almost an equivalent number of females.

The customer are living in major cities such as Berlin, Hamburg, Munich, Cologne or Frankfurt. Cities may be selected according to their respective GDP as well.

The price factor is very important in the wine industry in general but especially for a small and new market player distributing wine from Switzerland, so Uvavins has to target people with higher education that are more likely to have higher incomes.

The gender is a crucial factor to consider as well, the buying and drinking habits differ a lot from women to men. Wine colour, packaging, price or even winery size will be more or less important in the eyes of women and men. For example in the US, women represent 59% of regular wine purchasers and women in Germany buy seven bottles out of ten sold. The rise in influence of women winemakers is playing a role in the "feminisation" of wine (Robinson, 2014).

Psychographics

A population can be divided into groups based on the occupation of the Chief Income Earner (CIE). Uvavins will be in a niche market focusing on the higher social grades[16]such as A and B, respectively the higher managerial, administrative or professional and the intermediate managerial, administrative or professional (Tutor, 2015). Uvavins will be traditional and exclusive and will respond to the corresponding values and needs with customers looking for a unique product that is not accessible to everyone.

The lifestyles, which correspond best to Uvavins' customers are the "Aspirer" and the "Explorer". The Aspirer is a materialistic and acquisitive person, who is orientated towards image, appearance and fashion. The packaging will play a bigger role for these customers than for the others. The Explorer is looking for autonomy, experience and new frontiers. This lifestyle is generally for younger generations, for which the brand choice will highlight a difference (Tutor, 2015).

Sociographics

The idea behind sociographic segmentation is to understand the different influences on the customers. For example, the cultural influences will not differ a lot from the one in Switzerland because institutions like family, religion or education are quite similar. Again, the social class will strongly influence the buying behaviour. By targeting the middle-upper and upper-upper classes, the products may have to be, for example, re-labelled especially to provide certain information.

[16] Grades go from A to E (A being the highest and E the lowest).

The goal is to have people perceiving Swiss wine as an exceptional product, so people looking for exception might have different expectations about the bottles, the label design or the information on the labels. This is something to consider for Uvavins, which has anyway to go through a re-labelling process to export the wine.

Finally, the influence of reference groups is very important with direct impact on the attitude, values and behaviour. People are influenced by the group to which they belong or aspire to belong (Nyandat, 2013). This is very interesting to understand where the influence comes from for Uvavins because the company will deal with a limited number of customers and the word of mouth is a crucial asset. Gathering potential customers with the right profile may be a way for the company to create a reference group and insist on the fact that these people are exceptional.

Strategic recommendations

From the above analysis of the customers' profile, the following points should be remembered when building the new export strategy:

- Women have a significant role in the purchasing process, so the company should differentiate its messages and promotion campaigns from a gender to the other. Women may be sensitive to different factors and, for example, more attentive with a woman winemaker or even salesperson. On top of that, women do appreciate certain varieties and Uvavins should take it into account.
- The design of the bottles, labels and packaging in general is determinant for many wine lovers. The Aspirer lifestyle is influenced by packaging and, more importantly, a specific design may be required for fit the social classes' standard. People from middle- to upper-upper classes might be more careful about prizes, distinction, symbols, and exclusivity. Watch making companies have the habit of numbering the watches and even when there are thousands of them. Uvavins could easily play with that and introduce the numbers on bottles, just to create the feeling of exclusivity.
- On top of being younger, the Explorer lifestyle is generally the first to try new brands, so these are two major characteristics that make this group of people very attractive for Uvavins.

- Attracting younger generations is important to build customer loyalty and diversify the customers' range. Then, this will be easier to introduce a wine to people willing to explore new products and brands.

- Income classes and urban areas appeared several times in the analysis, so Uvavins could select its sales points according to those factors. If the company keeps working with a single employee, a strategic selection of cities seems mandatory. There are important inequalities of GDP between the sixteen German states; five of them account for about 70% of total GPD (North Rhine-Westphalia, Bavaria, Baden-Württemberg, Lower Saxony and Hesse). Therefore Uvavins could focus on the major cities in these states and even select them according to their proximity. According to the above criteria of selection, the cities would be Cologne, Düsseldorf, Munich, Stuttgart, Frankfurt and Karlsruhe.

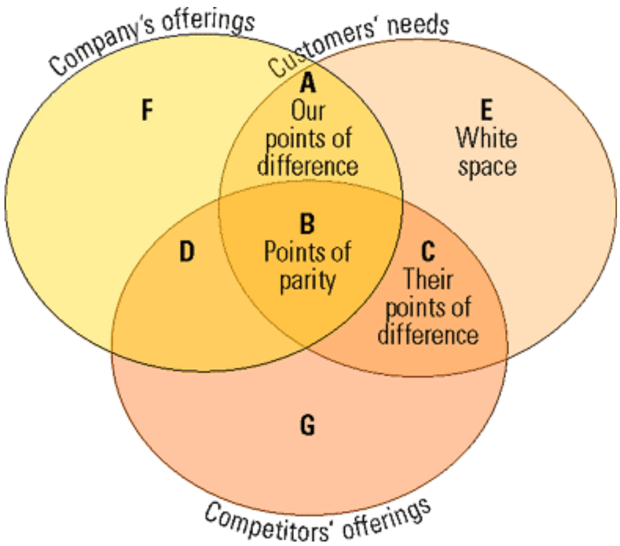
- The creation of events or a club should be in Uvavins' pipeline in order to educate its potential customers about Swiss wine and emphasize on the fact that membership is required in order to be part of the happy few. It joins the concept of exclusivity.

1.5.5 Three Circles Analysis

The visual representation of this analysis is interesting because it helps to define where are the company's advantages, what are the customers needs and where the company is different compared to the competitors. As a result, competitive advantages are revealed and the company understands what to use in order to improve its strategy.

The first circle represents the company's offerings in regards to customers needs. The second circle represents the customers' perception of the company's offerings. The last one represents the customers' perception of the competitors' offerings (Urbany, Davis 2007).

Figure 12 - 3 Circles Analysis



Source: Urbany, Davis 2007

The A, B and C are the crucial areas which define the company's competitive advantages. For Uvavins, the points of difference, points of parity and competitors' differences will be defined in the following table, which focus on the A, B and C areas.

Table 6 - Determination of the A, B and C Areas

Company's offerings	**Customers' needs**	**Competitors' offerings**
	Competitive price/quality ratio	Competitive price/quality ratio
Exclusive wine, limited in quantities	Exclusive wine, limited in quantities	
Traditional wines	Traditional wines	Traditional wines
Unique varieties (biological)	Unique varieties (biological)	
Prize-winning wines	Prize-winning wines	Prize-winning wines
Combination of fine food with fine wine	Combination of fine food with fine wine	
New tasty experience	New tasty experience	New tasty experience
	E-shopping	E-shopping
	Exotic wines (unusual)	Exotic wines (unusual)
Feeling unique	Feeling unique	
Guarantee of a quality wine	Guarantee of a quality wine	
Attentive & skilled salesforce	Attentive & skilled salesforce	
Discover varieties	Discover varieties	Discover varieties
Please family & friends with great wines	Please family & friends with great wines	
	Country symbolic (Italy→romantic)	Country symbolic (Italy→romantic)
	Wide range of varieties	Wide range of varieties

The colours determine the categories:

- Green lines: category A
- Pink lines: category B
- Blue lines: category C

The category A shows the advantages Uvavins has over its competitors. The advantages are all developed out of the weaknesses of the company: the company is a small player, the production is limited and the brand lacks popularity, so out of these weaknesses, Uvavins developed a strong (even if small) salesforce to educate people about Swiss wines. Uvavins can therefore play on the uniqueness of the product.

The Swiss company has to offer “more” in order to be considered as valuable by consumers. With high prices and low products awareness, the only solution is to create other incentives based on symbols such as tradition, rarity, quality and discovery.

The category B shows the area of parity and Uvavins seems to defend its place quite well in those areas. There is a lot to say about the tradition of Swiss wines, many awards were won and the country offers very unique varieties.

The category C shows the competitors’ advantages and Uvavins cannot compete with the other countries on these areas as the advantages are mainly based on history, geography, size of productions and production costs. The only exception is E-shopping.

From the 3 Circles analysis, the strategic options for Uvavins are the following:

- Uvavins has to concentrate on developing their advantages by focusing on its limited and high quality products.
- Online sales should be integrated in Uvavins strategy in order to increase public awareness and sales. People are turning more and more to the Internet, so this is a tool for the company to become innovative.
- The company has to strengthen its identity. To do so, Uvavins has to create a common brand or a symbol of recognition. The aim is that the consumers recognize the brand and know this is a pledge of quality.

1.5.6 Conclusion of the Analysis

Lots of opportunities appeared all along the analysis, so the following conclusion is dedicated to regrouping what has been discovered before establishing a final list. The synthesis of the entire analysis will also help in defining opportunities that appeared several times and the ones that could be combined to form a stronger one.

The German market seems to be very promising for different reasons. First, this is one of the top importers, ranked first in volume before the UK and the US. From 2012 to 2013 the volume of imported wine decreased by 1.7%, a relatively small percentage compared to the other top importers:

- USA: -6%
- UK: -0.7%
- France: -11%
- China: -4.4%

Then, Germany is ranked third in value, after the US and the UK. It means that Germany is a huge market for imports with market segments for all sorts of wines. The total value of imports increased by 3.8% in 2013, this is one of the biggest increases among the top importers:

- USA: 0.3%
- UK: -5.2%
- Canada: -1.1%
- China: -4.8%

In addition to positive imports data, there is an interesting potential in wine varieties; despite the similarities between Swiss and German wines, there seems to have possibilities to offer Swiss varieties that could complement the German offer; for example with Chasselas, Gamay or Gamaret.

While continuing to look at the types of wine, one of the points that came out was the very wide product range of Uvavins in Germany. The company chose not to limit its offer, but to give an overview of their entire range. This might be a point to reconsider if the company wants to follow a new strategy.

Then, the distribution channels are an important element. Uvavins is relying a lot on direct sales and there will be even more focus on that channel in 2015, so what are the tradeoffs of such strategy? Despite their potential, the company overlooked some channels such as the online sales or the discounters, so this needs consideration. The on-trade channel seems to need to be re-thought as well, so the company may have to reconsider its distribution policies in general.

The wine industry is very competitive and Uvavins is a very small actor in Germany. The company totally realizes it and decided not to invest heavily in an export strategy for the moment. The German entity has therefore to cope with a limited budget and very limited amount of human resources. Therefore the company could really focus on niche markets in order to satisfy a very specific demand instead of exploring all the possible markets. By putting the accent on a limited amount of customers, the company will eventually sell less volume, but at a higher value.

The premiumisation trend has been mentioned many times and it is a crucial factor to analyze when developing the strategic plan. Uvavins is limited in its actions, due to available resources and the ambition of the company, so this trend is a great opportunity to sell Swiss wines that are of recognized-quality and relatively more expensive than competitors products.

The only employee responsible for the German market is under great pressure because he's responsible in developing a business almost from scratch, he's in charge of all the administrative tasks, he has to develop its customer's base and he's travelling around the country to represent the company in fairs. So, Uvavins has to take really good care of its employee and may have to find ways to keep his motivation at the highest. Regular visits have proven to be very efficient on the Japanese market for example. Also, hiring additional workforce may be something to consider if Uvavins desires to grow abroad.

To increase its product awareness, which remains one of the company's major weaknesses, Uvavins should work on its identity. For the customers to recognize the product, a visual distinction may be very helpful.

All of the above opportunities have to be adjusted to the company's positioning. If Uvavins want to be consistent in its strategic moves, the positioning has to become a reference. As seen in the analysis, by being positioned in tradition/exclusive, the company will be perceived differently. This difference is very valuable in customers' minds.

2. Discussion

2.1 Areas for Strategic Opportunities

2.1.1 Premiumisation

The premiumisation trend came out several times and under different forms during the analysis. The German market has different attributes that are a trigger to follow this new route. Among the other top importers, Germany strongly distinguishes itself by one of the most promising market in terms of both volume and value. The “buy less but better” is a great opportunity for Uvavins, as a seller of wine from the premium and super premium segments.

Swiss wines are still lacking awareness on that market and this could be used as an advantage. The work can still be done in order to place Swiss wines (at least Uvavins’ wines) into the premium and above segment. In order for Uvavins to sell bottles as a wine of premium quality, the company needs to focus on a selected range of product. Of course, the entire range includes wines of a good quality, but the crucial point is to differentiate a “basic Swiss wine” from a “premium Swiss wine”.

Uvavins could first select the collections they want to sell, and then even which wines from each collection. For example the choice could be the following (according to product list available in Appendix 1.4.5):

- Collection Premier Grand Cru
- Collection Expression
- Collection Bernard Ravet
- Collection Mousseux
- Collection Empreinte

Only by selecting, according to prices, the range of products is reduced from 34 to 14 wines. Then in each collection, wines could be selected for example according to the received awards. The price range would therefore go from €8 to €19.

It is extremely difficult for the consumers to know what a bottle is worth, so Uvavins has to position its entire product line into that segment in order for the consumers to know what to expect. If buying a Swiss bottle is associated with buying a great bottle, the decision making process will be facilitated when looking for a great wine.

On top of that, a “basic Swiss wine” is already more expensive than the majority of its competitor, so the risk is that consumers may only perceive Swiss wines as generally expensive and forget about the quality. By following the premiumisation opportunity, the aim is for the price factor not to gain the upper hand over the quality factor.

The premiumisation of the product range has to be coordinated with the positioning of the company; this will help the consumers to categorize Swiss wines in their minds. The purchase of a Swiss wine, either for own consumption or as a gift, will be perceived as special and exceptional. Uvavins somewhat followed that strategy already for the Hong-Kong market. In that area of the world, Uvavins exports a limited range of bottles, but their expensive line; Hong-Kong represents 7% of the sales volume, but 30% of sales value, so Uvavins is quite successful over there.

Finally, when interviewing the sales department, the idea of focusing on certain types of products was not very welcomed because it was better to sell as many bottles as possible, regardless of the price, than only a few expensive ones. However, if the company does not want to invest too much on the German market for now and keeps its only employee there, the opportunity of selling less, but at a higher value is very attractive. Managing the entire territory is challenging for a single person, so Uvavins could focus on a limited customer group, serve them better and increase its revenues.

2.1.2 Open/Close Distribution Channels

Channels of distribution play a big role in the wine industry and they should match with the type of business. Uvavins is a small actor in Germany and does not have large quantities available for exporting. This is one of the additional challenges when establishing a new strategy for Swiss companies because as the big majority of the production is sold domestically, the actions are limited abroad (cannot provide half of the production for export).

So, the company needs to find a temporary strategy in this transition period, where Swiss wines are still sold mainly domestically, but the need to export is rising. The main channels for Uvavins are direct sales and Specialists, so fairs are crucial (this is where Uvavins meets both direct customers and Specialists). The Swiss company could therefore put the accent on these channels and forget about the others in order to dedicate more time to the main customers by trying to sell more through fairs. These two channels are responsible for 65% of the sales and require an important investment in term of time (organization of the stand and participation in fairs); so the employee of Uvavins in Germany could cover more fairs and develop its network in these events.

The market shares of Specialists are expected to increase, so it seems to be a relevant opportunity.

The other solution would be not to close, but to open new channels of distribution. As discussed above, fairs are time-consuming, so what about looking for new ways of selling Swiss wines? The hard discounters have never been part of the company's strategy, however, they control about 50% of the German market and keep rising in shares every year. With its current export's ambition, Uvavins could not provide enough wines to supply a chain like Aldi all year long. However, some temporary promotions could make the export figures to skyrocket for the Swiss company. The hard discounters tend to increase their range of premium wines, so the Swiss products could totally fit in their assortment. The alternative to hard discounters would be distributors, which have their network and could be interested in Swiss wines to widen their offer. However, a few of them control the market and they have a huge bargaining power.

Finally, the current German sales force of Uvavins may be sufficient in order to prospect for new partnerships with hard discounters. The company could target high volumes without requiring any major investment. There is a consolidation of the distribution channels, and mainly due to important actors such as Aldi or Lidl, so working with them would be a way not to suffer from this market phenomenon.

2.1.3 Grow Online

"Internet is the new, rapidly growing distribution channel. It is an increasingly interesting market for established players on the wine market as well as for professional newcomers. The new technologies, the growing transfer rates, and the growing professional competition make it even more attractive. However, it still represents a very low ratio compared to other distribution channels." (Chameeva, Zhang 2012: 5-15)

The above sentence tells a lot about online sales, the only question is why Uvavins still doesn't have an online presence on the German market? Despite the development costs, a website is very interesting as a channel of distribution. Internet is becoming a bigger actor in the wine industry and this is especially efficient when it is used to educate consumers about the products.

On top of being a distribution channel, Internet does provide opportunities for the premium wine segment. According to the CBI (2014): "Premium wines sell well online as consumers are willing to pay more for a less common wine which they cannot buy at the supermarket".

The E-shop is becoming a must in today's world and this would be a great tool for Uvavins to have a web shop, especially considering they don't have a physical one in Germany. By providing content such as product reviews, information about the history and wineries and news on awards and events, Uvavins could really promote its wines and spread the message.

German consumers show interest in online sales, so Uvavins should take advantage and build an E-shop. Such an opportunity is a key in increasing the product awareness, boosting sales and in being an innovative actor in the sometimes old-school thinking of the wine industry.

2.1.4 Brand Identification

Medal-winning wines bring recognition and this is priceless in such an industry. The problem is that only the awarded wine gets recognition and experiences increases in sales. German wine drinkers do not know the specifics of Swiss wine, and therefore cannot dissociate a certain Swiss variety to another one or a region from another. Uvavins could create a link between its wines; create an identity allowing the customers to recognize the products.

On the first hand, the more visible the product is, the more people will trust it. It is always easier to buy a wine when we recall having seen the bottle once before. On the other hand, the association of a medal-winning wine with other wines will bring reputation to all of them.

By customizing the bottles' capsules[17], Uvavins would be able to create the missing link among the product range. Interestingly, Austrian producers followed that strategy by using the Austrian flag on the top of the cork.

Source: http://www.crushwineco.com

[17] Capsule : neck of the bottle

Austria is one of the top competitors for Swiss wine on the German market and the country recently intensified and successfully developed the promotion of its wines abroad.

Uvavins could use the Austrian example as reference and develop its own symbol to have customers recognize Swiss wines; either in collaboration with other Swiss producing regions or as a company.

The Austrian flag is quite discrete and it may not be of use for Uvavins, especially if the bottles of wines are on a shelf, where customers risk not seeing the top of the cork.

The above picture shows what the capsule could look like, using the Swiss flag as a well-known symbol, the name of the company and the reference “Premium Swiss wine”. The idea is to have a design people will remember and identify as being part of that Uvavins-Cave de la Côte premium collection.

2.1.5 Swiss Varieties as a Complement to German Ones

Swiss and German wines have a lot in common, due to geographic and climatic similarities therefore producing comparable varieties. Taking into account that German consumers like to buy domestics wines and that the Swiss products are generally in an above price category, Uvavins should not fight on the same battlefield.

The goal isn't to confuse the consumers with similar varieties because in such cases, Swiss will have difficulty.

So, the idea is to offer a specific range of products with wines that can be distinguished from German wines. In Switzerland there are 200 varieties and about 40 of them are indigenous varieties that are very old and sometimes unique. Uvavins could select a limited amount of varieties and promote them only. It would be easier to deal with less products as well, and the promotion campaigns could have a special focus on the varieties.

A limited offer with exclusive products would match the new company positioning (tradition and exclusive). For example the chosen varieties could be Chasselas for white wine and Merlot and Gamaret for the red wines. Chasselas would be the only white wine for two main reasons; German consumers are more interested in imported reds and Chasselas is a very typical Swiss wine that will be able to be distinguished from the German white wines (such as Riesling). Then, the Merlot and Gamaret are also very typical Swiss wines and they will be distinguished from the German Pinot noir or Dornfelder.

2.1.6 Play on Partnerships

Uvavins has a single employee in Germany who is suppose to handle the whole territory and develop the company's activities. The main opportunity with partnerships is to build a solid customer base and create long lasting relationships. By focusing on partnerships, Uvavins could continue running its exports in Germany with only one employee and slowly develop the activities without any major additional investment.

The idea is not far from the one with hard discounters as a distribution channel, it is about developing a network and taking advantage of the selling capacity of the partners. For example, the on-trade sales have been increasing in Germany and represent an important market, especially for premium wines. A restaurant network may be interesting in very specific and high-end restaurants that sell only Super Premium wines.

Another great partner to develop is Frischparadise Märkten, the supermarket chains that has been approached by Uvavins in Germany. Such a partner, on the long term can be very profitable and could have a huge selling capacity.

Finally, Uvavins could create partnerships with some of their current clients who are specialized in fine food. During fairs and similar events, Uvavins sells important quantities of wine to companies that are specialized in fine food, catering services etc.

So, these relationships could be improved in order, for example, to have a stand together and use the customer base of these partners. The combination of food and wine is interesting for both parties and this is a real value-added for the food and wine lovers. People are interested in knowing what wine matches what type of food, so they may buy directly from Uvavins if they get the right advice.

2.1.7 Develop the German Sales Force

Uvavins will not indefinitely be able to develop its export activities in Germany without investing more capital. For now, the employee on the field has been able to expand the business, but the company does not yet consider the German market as very profitable. Results showed that it was worth taking good care of its employees[18], however, the company will reach its capacity limit (if not reached already).

Uvavins could hire a second person to support Klaus Immes in his daily activities. The company could even look for someone with little experience in order to take care of the administrative tasks and deliveries; an intern may be a solution to limit the costs and the administrative burden in the beginning. This would allow Uvavins to do a first trial without heavily engaging the company.

An internship in sales/administrative position is paid around €500-600 per month, so by assuming that the average selling price of a bottle of Swiss wine is €7 in Germany, the bottom line would be reached with 80 additional bottles sold per month. So, the company would only have to sell 14 boxes of 6 bottles to be profitable. If we look back at the company's activities in Germany, the revenues went from €58,000 to €82,000 between 2013 and 2014. This means that the investment in an intern would require an increase of 8% of the sales per year.

[18] Increase of visits in Japan lead to direct increase of sales.

2.2 Chosen Opportunities

The final selection of opportunities is based on the interview with Pierre Thomas, a Swiss journalist specialized in wine (Appendix 2.2.1). Thanks to his experience, interesting comments and advices, it has been possible to define which opportunities have more potential. The goal is to focus where it is most likely to be successful and not to follow every single idea. So, the opportunities developed under 2.1.1 to 2.1.7 will be discussed one by one to determine which will be pursued.

Premiumisation

According to Pierre Thomas (Appendix 2.2.1), Swiss producers aren't accustomed to marketing in selling their wines, they usually look at what has been done elsewhere and repeat it. A few years ago, Swisswine Promotion[19] went to Japan in order to present Swiss wines and its director, Pierre Keller was really upset about what wines Uvavins was selling over there. The image of the wines, at least wines from La Côte, was a very cheap one because Uvavins was exporting the low-end products. Japanese people were ready to spend more for a premium wine, as they are already with Swiss watches or Swiss chocolates, so this cheap image was very inappropriate. The German market is different from the Japanese, but when looking at the list of products offered by Uvavins, it is clear that the company would sell anything possible. However, the Swiss company has all the wines it needs to sell high end products, for example with the Bernard Ravet collection.

In the end, it is about the image and this is crucial for Swiss wines to build and defend a certain image on the German territory. On top of that, the idea of premiumisation is totally in accordance with what Swisswine is trying to achieve. The promotion agency is willing to only export premium wines because it is easier to convince wine lovers with an original product than the lambda drinkers who know nothing about it; especially with the intense competition of wine from the New World.

Finally, Swiss producers are not able to export wine in huge quantities and satisfy German consumers that are price sensitive; so Swiss producers better focus on a niche market. For all the above reasons, the premiumisation should really be an opportunity to pursue.

[19] The organisation promoting Swiss wines abroad.

Open/Close distribution channels

Pierre Thomas highlighted the association of premium wines and Specialists; according to him, wines from a higher price segment do not really fit with traditional wholesalers. Jacques Wein-Depot is one important Specialist on the German market with a network of approximately 50 to 60 wine shops ("oenotheques") and this could be one important channel of distribution to focus on. They have an important distribution network and even if they do not focus on premium wines, they have a strong commercial strategy. Jacques Wein-Depot is a well-organized company offering wine tasting, after which the customer will generally buy a 6 bottles' box if she/he's convinced. This would be a very efficient way to get people to try Swiss wines and create their own opinions about it.

Regarding the idea of opening distribution to new channels such as hard discounters, Pierre Thomas doesn't believe in it. The problem is again about the image because it will be difficult to sell a wine with a price above average when people remember Swiss wines as a low-end one. This actually happened a few years ago with a surplus of Fendant sold in Germany through a supermarket chain and this created a huge scandal. Selling through supermarket chains would break the image, so this would not be a good route to follow. Of course this is tempting, but history proved it was not a clever choice.

To maintain consistency with the type of wines and the positioning of the company, the distribution channels should not be opened, but closed to focus on Direct Sale and Specialists.

Grow Online

Online sales may be increasing and become an interesting distribution channel to consider in the wine industry, but not for all wines. During the interview, Pierre Thomas explained his scepticism about Swiss wines being sold online. Internet is actually very useful when purchasing well-known wines such as Bordeaux because it is possible to compare the different prices and purchase them. However, why would someone purchase an unknown wine online?

The only ones who manage to do so are companies such as Qoqa.ch, who's selling unknown wines at a promotional price for a limited amount of time. So, it could also work for Swiss wines in Germany, but it would not be the case with a traditional E-shop. "In order to counter the unawareness of the wine, the wine has to be good and for people to know that, they need to taste it" (Appendix 2.2.1).

So, Internet is interesting when people know the product. For now, Uvavins should not pursue to grow online, at least for now. In the meantime, it may be interesting to sell through an original platform such as Qwine.ch[20], but in Germany.

It takes time to build an image and increase its online position, so Uvavins should immediately start to publish relevant content and create interactions with Internet users. The idea of building an online community and interact with influencers is consistent with the company positioning; the members club should as well exists online.

The example of Gary Vaynerchuk highlights the importance of blogs in nowadays society. He transformed his father's modest wine shop into a well-known online platform (Wine Library) selling wines and providing videos to educate customers about wine. He started with posting one video a day, every single day, with a very low budget and he now makes professional videos with millions of people following him. However, it took time, so the Swiss company should decide on whether they want to expand their activities or not and follow a route.

Once the customer base has been created and the business starts running, Uvavins should go into E-commerce and exploits some of the great opportunities brought by Internet. German consumers appreciate receiving advices and information before to buy wine, so the blog is the perfect place to promote the products. In addition, German consumers like, once they like the product, to buy many bottles at a time, so the E-commerce will perfectly serve that need with a shorter buying process and immediate delivery.

Brand Identification

In the 80's, Austrian wines faced a huge scandal linked to the usage of dyethylene glycol, a chemical substance present in the antifreeze, in order to boost the sugar content of the grapes. It was dramatic for the Austrian wine industry, but the good thing was that afterwards, people learnt that Austria was a wine-producing country. Since that scandal, the producers were able to increase the quality of the products and show it to the rest of the world. Fortunately, Switzerland never had to face a similar crisis, but because of this very few people know about the Swiss wine industry. Therefore the idea of using the capsule as a symbol is a good idea, but it already exists.

[20] Website offering flash daily sales of wines with a discount

Indeed Swisswine[21] developed, with the help of a graphic designer, its own paper ring to put on the capsule. Pierre Thomas actually thinks it would be dangerous to multiply the symbols and that companies should adopt the Swisswine one[22].

Source : http://www.swisswine.ch

The picture shows the paper ring that can be placed in three different areas on the capsule. The idea of using a symbol was therefore accurate, however, Uvavins should not develop its own symbol, but use the Swisswine one. Knowing that the director of Uvavins is involved in Swisswine and other promotions, the company should be using it already.

Swiss Varieties as a Complement to German Ones

German companies actually used the opposite strategy; they came on the Swiss market with varieties such as Pinot noir with the goal of proving that they were producing a good quality Pinot. German producers presented their wines at the Mondial des Pinots[23] in Sierre and received some medals thanks to their advantageous climatic conditions the past two years.

[21] The Agency promoting Swiss wines abroad
[22] The aim of Swisswine is to have all Swiss producers using the symbol they developped
[23] World Pinot Contest

Pierre Thomas insisted on the fact that it is easier to approach German consumers with a variety they know and then introduce something more original such as the Gamaret Garanoir or Gamay. It takes time to explain the entire history around the Gamaret variety, so it will be much easier to have them taste the wine and, when they are convinced, give them more information about it.

The opportunity of using Swiss varieties as a complement to German ones will therefore not be followed. It seems more relevant to use a wine like Pinot as a hook and then introduce different varieties.

Play on Partnerships

Pierre Thomas was very enthusiastic about the concept and he imagined two different kinds of partnerships, the traditional and the modern ones. The first one is about associating wines with cheese. It may seem a little old fashioned, but it is coherent. Swiss cheeses are well known in Germany and this could work with German cheeses as well. According to the Swiss journalist, the combination is interesting as long as not only one product such as Chasselas, but a whole range of wines is proposed. It is about promoting the diversity of Swiss wines and cheeses.

The modern way is focused on a more sophisticated cuisine; there are already Swiss wine ambassadors in Germany working in collaboration with Swisswine.

There is for example a Chef in Cologne who wrote a few books and who's very involved in Swiss wines with a special focus on premium ones.

So, partnerships seem to present a lot of promising opportunities. Uvavins should put a special focus on on-trade (restaurants) partners and fine-food ones during fairs. Collaboration with Swiss cheeses producers would be very helpful as well.

Develop the German Sales Force

It was difficult for Pierre Thomas to give his opinion on the development of sales force as this is highly correlated to Uvavins' ambition and budget. However, the journalist agreed that the German employee could use some support.

On the basis on that opportunity, an additional idea was evocated during the interview, the concept of opening Swiss wines bars.

Uvavins could do a partnership with sommeliers in the major German cities such as Frankfurt, Berlin and Düsseldorf. It would be interesting to start with Berlin, as an embassy for Swiss wines with all the locals and tourists. Another opportunity would be to find a German partner that would sell Swiss wines in exchange of having Uvavins selling German wines. Uvavins is already selling foreign wines in Switzerland and German people are interested in the Swiss market, so this could be feasible.

So, Uvavins should develop its presence in Germany either by strengthening its sales force or by looking for new partners, as the idea raised by Pierre Thomas. More efforts on the ground will allow the Swiss company to expand its activities and generate higher profits abroad.

2.3 Personal Recommendations

I believe it is time for Uvavins to develop a clear strategy and stick to it. The first step consists in reducing the range of products in order to define the segment of wines they are selling. It seems that Uvavins placed an employee on the German market and decided the job was done, but it is the total opposite. Now that the company has a certain weight on the ground, it should take advantage of it by giving him opportunities and listening to him. Actually, I think that it would have been wise to develop an export strategy before hiring someone and then share it with him.

Based on the positioning, the company should anticipate each of its actions to give a clear message to German consumers. The opportunities developed under the point 2.2 demonstrate that there is a concrete potential for the company in Germany. It was very interesting to confront these opportunities with Pierre Thomas in order to confirm (or not) the accuracy of each proposition. The interview helped me realize that, somehow, Swiss producers still have the willingness to export the wines that they have difficulties selling in Switzerland. Their strategy shouldn't be based on that. Why would German people buy wines that even Swiss people don't want to drink?

According to me, the Swiss and German entity should communicate much more and work as a team. The impression I got was that both entities have some contacts, but not enough to work side by side. Germany is the only country with an Uvavins' employee on the territory, so it should really serve as a trial country. If the company manages to improve its strategy and get concrete results, Germany may be the first of a long list with employees on the ground. The company's ambition is to increase its exportations, so it is heading in that direction.

I think the company has some important assets and should use them more. For example, all the infrastructures provided by organisations such as Swisswine or the SWEA. Switzerland is such a small country with such a limited wine production compared to some giants such as Italy, Australia or South Africa. Thus the Swiss companies should at least work together in order to be stronger. From ideas such as sponsorship of fairs to the use of the paper ring on the capsule, companies can really make a difference by working together.

I am pretty confident about the capability of Uvavins to change the rules of the game, however, it will require time and lots of effort which are, for now, not in their business pipeline.

Conclusion

The analysis and its results demonstrated that it is totally achievable for Uvavins to improve its export strategy. The fact that the company is not willing to use a very costly approach should not be an issue; the results are pretty conclusive about growing abroad by changing the methods. For example, the first action to take isn't necessarily to hire an additional employee, but rather to reconsider the range of products and look for new partners. The complementarity in the list of opportunities allows the company to improve its strategy step by step without requiring a high up-front investment.

Uvavins lacked of a clear vision when it first moved to Germany and the revenues from the past three years were not high enough to convince the company. As a result, Germany was not considered as a crucial asset and was kind of left out. It was not abandoned at all, but the company didn't try to analyze the situation and let it be entirely managed by a single person. Uvavins should have been setting the vision and the strategy to follow during the last three years.

Exportation is about selling an image and the strategy should be focused on good quality products. With the actual production capabilities and costs, Swiss companies should target a niche market. Uvavins produces some very high quality wines that deserve to be recognized internationally. The German market is a chance to promote them. Of course, good wines are not that difficult to sell in Switzerland, but the Swiss wine industry won't get any international recognition if only low end wines are exported. If a company chooses to go and sell abroad, some strategic choices have to be done accordingly.

I became conscious of the importance for a company to "be present on the market" when Pierre Thomas gave me the example of Marie-Thérèse Chappaz. Considered as the most famous wine maker in Switzerland, Mrs Chappaz got the attention of a New-York journalist. However, after visiting a dozen specialized wine shops in the Big Apple, the journalist abandoned its research. The important point here is that Swiss wines need to be present if they want to gain awareness. This is totally in line with the opportunities that have been discussed: the partnerships, the Specialists, the niche market with premium wines and the brand identification.

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Appendix 1.2.1 Wine Consumption in Switzerland

This table shows the consumption of wine in Switzerland between 2010 and 2013. First it shows the white wines, domestic ones followed by the imported. Then it shows the red wines, again domestic ones followed by foreign ones.

The last part shows the total consumption and the total consumption excluding exports.

All the numbers are in hectolitres (hl), 1 hl corresponds to 100 litres.

in / en hl	2010	2011	2012	2013	
INLÄNDISCHER WEISSWEIN					**VIN BLANC INDIGENE**
Lager am Anfang	797'062	793'870	854'560	889'531	Stocks au début
Ernte abz. Traubensaftproduktion	496'988	536'217	498'596	397'725	Récolte sans jus de raisin
Verfügbare Menge	1'294'050	1'330'087	1'353'156	1'287'256	Disponibilités
Lager am Ende	793'870	854'560	889'531	754'528	Stocks à la fin
Konsum	500'180	475'527	463'625	532'728	Consommation
AUSLÄNDISCHER WEISSWEIN					**VIN BLANC ETRANGER**
Lager am Anfang	121'461	113'877	106'051	110'759	Stocks au début
Einfuhr: - Fasswein	206'927	207'904	201'283	178'466	Importations: - en vrac
- Flaschenwein	159'823	167'054	173'817	181'765	- bouteilles
Verfügbare Menge	488'211	488'835	481'151	470'990	Disponibilités
Lager am Ende	113'877	106'051	110'759	107'614	Stocks à la fin
Konsum	374'334	382'784	370'392	363'376	Consommation
Gesamtkonsum Weisswein	874'514	858'311	834'017	896'104	*Consommation tot. de vin blanc*
INLÄNDISCHER ROTWEIN					**VIN ROUGE INDIGENE**
Lager am Anfang	907'067	877'631	931'209	929'767	Stocks au début
Ernte abz. Traubensaftproduktion	533'347	582'942	505'008	440'904	Récolte sans jus de raisin
Verfügbare Menge	1'440'414	1'460'573	1'436'217	1'370'671	Disponibilités
Lager am Ende	877'631	931'209	929'767	834'839	Stocks à la fin
Konsum	562'783	529'364	506'450	535'832	Consommation
AUSLÄNDISCHER ROTWEIN					**VIN ROUGE ETRANGER**
Lager am Anfang	468'104	483'723	466'985	458'825	Stocks au début
Einfuhr: - Fasswein	627'832	561'372	533'739	502'688	Importations: - en vrac
- Flaschenwein	753'830	764'824	788'140	779'557	- bouteilles
Verfügbare Menge	1'849'766	1'809'919	1'788'864	1'741'070	Disponibilités
Lager am Ende	483'723	466'985	458'825	447'846	Stocks à la fin
Konsum	1'366'043	1'342'934	1'330'039	1'293'224	Consommation
Gesamtkonsum Rotwein	1'928'826	1'872'298	1'836'489	1'829'056	*Consommation tot. de vin rouge*
GESAMTKONSUM	**2'803'340**	**2'730'609**	**2'670'506**	**2'725'160**	**CONSOMMATION TOTALE**
davon inländischer Wein	1'062'963	1'004'891	970'075	1'068'560	*dont vin indigène*
davon ausländischer Wein	1'740'377	1'725'718	1'700'431	1'656'600	*dont vin étranger*
Ausfuhr weiss [1]	5'998	5'598	5'668	6'357	Exportation blanc [1]
Ausfuhr rot [1]	14'231	14'735	10'567	10'727	Exportation rouge [1]
GESAMTKONSUM IN DER SCHWEI	**2'783'111**	**2'710'276**	**2'654'271**	**2'708'077**	**CONSOMMATION TOT. EN SUISSE**

Source: Année Viticole 2013

Appendix 1.2.2 Swiss Wines Export and Import

Export/import de vins suisses (kg en millions)

Evolution 2003-2013			Export par pays	
Année	Export*	Import	Allemagne	0,49
2003	1,56	184,17	France	0,27
2004	2,14	180,57	Pays-Bas	0,20
2005	2,56	181,41	Royaume-Uni	0,15
2006	2,73	176,66	Hong Kong	0,12
2007	1,98	187,49	Belgique	0,10
2008	2,03	184,53	Japon	0,07
2009	1,94	190,82	Chine	0,07
2010	2,13	193,97	Italie	0,06
2011	2,16	189,61	USA	0,04
2012	1,72	189,95	Espagne	0,03
2013	1,79	184,31	Autriche	0,03

* Depuis 2003, l'Allemagne est le premier marché exportateur, suivi de la France et du Royaume-Uni (alternant sa place avec la Belgique jusqu'à 2010, puis le Pays-Bas dès 2010). Source: Administration fédérale des douanes.

Source: Anguelova 2014

Appendix 1.3.1 Wine Production 1990-2013 (selected countries)

This table shows the wine production of different countries between 1990 and 2012. The data are in millions of hl. At the bottom, the world and European production are shown.

The two columns on the rights contain the evolution of the production between 1990 and 2013 and between 2000 and 2013 for each country. For example the French production decreased by 27% between 2000 and 2013; it went from 57.5 million hectolitres to 41.1 million hectolitres.

Länder / Countries	in Mio hl / millions of hl						Veränderung / Change in %	
	1990	2000	2010	2011	2012	2013*	1990 / 2013*	2000 / 2013*
Italien (IT)	54,8	51,6	48,5	42,8	43,8	44,9	-18,1	-13,0
Spanien (ES)	38,6	41,7	35,4	33,4	31,1	42,7	10,6	2,4
Frankreich (FR)	65,5	57,5	44,3	50,8	41,1	42,0	-35,9	-27,0
USA (US)	15,8	23,3	20,9	19,2	20,5	22,0	39,2	-5,6
Argentinien (AR)	14,0	12,5	16,3	15,5	11,8	15,0	7,1	20,0
Chile (CL)	4,0	6,4	8,8	10,5	12,6	12,8	220,0	100,0
Australien (AU)	4,4	8,1	11,4	11,2	12,3	12,5	184,1	54,3
China (CN)	**	10,5	13,0	13,2	13,8	11,7	**	11,4
Südafrika (ZA)	9,0	6,9	9,3	9,7	10,6	11,0	22,2	59,4
Deutschland (DE)	8,5	9,8	6,9	9,1	9,0	8,3	-2,4	-15,3
Portugal (PT)	11,3	6,7	7,1	5,6	6,3	6,7	-40,7	0,0
Rumänien (RO)	5,9	5,4	3,3	4,1	3,3	4,3	-27,1	-20,4
Griechenland (EL)	3,5	3,5	3,0	2,8	3,2	3,7	5,7	5,7
Brasilien (BR)	2,9	0,7	2,5	3,4	2,9	2,7	-6,9	285,7
Ungarn (HU)	5,5	3,0	2,0	2,4	1,8	2,7	-50,9	-10,0
Österreich (AT)	3,1	2,3	1,7	2,8	2,1	2,4	-22,6	4,3
Welt / World	283	280	264	267	256	277	-2,1	-1,1
EU / European Union	224,9	201,5	156,4	156,9	146,0	162,2	-27,9	-19,5

Source: Wein Statistik 2015

Appendix 1.3.2 Wine Consumption in the World

Pays	Consommation	Consommation par couleur	Profil de la cible	Réseau de distribution	Droits d'entrée	Production	Importations	Importations de vin français
Afrique du Sud	3.730 mhl 7,0 l/hab 1,5%*	44,0% 54,0% 2,0%	★★☆	95,0% - 5,0%	0 287 ZAR/hl	10.972 mhl 3,5%* 294,2%**	63 mhl 1,7%**	44 mhl 69,1%***
Allemagne	20.300 mhl 21,1 l/hab 8,2%*	54,0% 36,0% 7,0%	★★★	30,0% 18,0% 52,0%	0 0 €/hl	8.300 mhl 3,5%* 40,9%**	15.211 mhl 74,9%**	2.583 mhl 17,0%***
Argentine	10.330 mhl 29,0 l/hab 4,0%*	69,0% 30,0% 1,0%	★★☆	20,0% 30,0% 50,0%	20% de CIF 0,5% sur CIF	12.630 mhl 5,0%* 100,0%**	9 mhl 0,8%**	1 mhl 9,0%***
Australie	4.660 mhl 24,2 l/hab 2,0%*	38,0% 46,0% 16,0%	★★☆	66,0% 20,0% 14,0%	5% de FOB + 79,22 AUD / litre d'alcool pur WET : 29%	12.446 mhl 4,4%* 267,1%**	1.461 mhl 31,4%**	293 mhl 20,0%***
Autriche	2.556 mhl 30,5 l/hab 1,0%*	49,0% 50,0% 1,0%	★★★	33,0% 38,0% 29,0%	0 0 €/hl	2.250 mhl 1,0%* 88,0%**	822 mhl 32,2%**	49 mhl 6,0%***
Belgique	2.960 mhl 26,0 l/hab 1,0%*	57,0% 30,5% 12,5%	★★★	62,0% 23,0% 15,0%	0 56,97 €/hl	3 mhl - 0,1%**	4.281 mhl 144,6%**	2.528 mhl 59,1%***
Brésil	3.838 mhl 1,9 l/hab 1,5%*	79,0% 7,0% 14,0%	★☆☆	50,0% 30,0% 20,0%	55% de CIF 40% sur CIF	2.730 mhl 1,0%* 71,1%**	812 mhl 18,8%**	48 mhl 5,9%***
Canada	5.066 mhl 17,4 l/hab 1,7%*	61,7% 34,7% 3,6%	★★☆	- - Mp	1,87 CAD/hl 62 CAD/hl	560 mhl 0,2%* 11,1%**	3.849 mhl 120,2%**	566 mhl 14,7%***

Source: Comtrade 2014

Appendix 1.3.3 German Imports of Wine by Country of Origin (volume)

Table 35 Imports of Wine by Country of Origin: Total Volume 2007-2012

million litres	2007	2008	2009	2010	2011	2012
Wine – Italy	636.5	612.1	644.4	665.7	715.1	606.3
Wine – Spain	242.1	248.6	217.6	222.8	300.5	313.5
Wine – France	253.1	240.6	237.9	247.6	261.4	264.4
Wine – South Africa	55.6	66.7	69.8	70.7	78.5	75.7
Wine – US	41.5	39.9	39.5	42.8	46.7	44.6
Wine – Australia	40.0	26.5	33.5	38.3	45.5	42.2
Wine – Macedonia	38.0	35.1	38.4	29.8	30.5	38.6
Wine – Chile	53.5	48.3	45.1	49.2	42.5	37.0
Wine – Austria	37.1	37.1	43.6	41.0	25.4	31.1
Wine – Denmark	15.3	19.3	28.5	19.4	16.8	19.3
Wine – Portugal	14.8	18.9	18.9	20.1	18.3	17.8
Wine – Greece	14.5	14.1	13.6	14.4	18.4	14.7
Wine – Hungary	13.8	11.5	16.5	17.1	16.1	14.0
Wine – United Kingdom	2.9	3.3	5.2	5.3	5.6	6.4
Wine – Argentina	5.9	6.6	5.1	4.2	4.7	4.8
Wine – Netherlands	9.8	7.2	6.3	2.4	4.3	4.2
Wine – New Zealand	0.7	0.8	0.9	1.5	2.6	2.9
Wine – Romania	7.0	5.4	4.8	3.1	2.9	2.3
Wine – Sweden	0.1	3.4	2.4	0.7	1.5	1.9
Wine – Luxembourg	1.9	1.8	0.2	0.6	1.7	1.5
Wine – Kosovo	1.9	1.7	1.2	1.2	1.0	1.1
Wine – Croatia	0.8	0.7	0.7	0.6	0.7	1.1
Wine – Belgium	0.8	0.9	1.0	1.6	1.2	0.7
Wine – Ukraine	1.0	0.7	0.7	0.7	0.7	0.6
Wine – Switzerland	0.7	0.8	0.7	0.7	0.8	0.5
Wine – Others	9.7	9.2	5.6	4.1	3.8	3.9
Wine – Total	1,499.0	1,461.1	1,482.2	1,505.6	1,647.1	1,551.1

Source: GTIS, Euromonitor International
Note: '-' indicates data not available

Source: Euromonitor 2014

Appendix 1.3.4 German Imports of Wine by Country of Origin (value)

Table 36 Imports of Wine by Country of Origin: Total Value 2007-2012

EUR million	2007	2008	2009	2010	2011	2012
Wine – Italy	721.9	785.3	781.4	794.2	860.7	878.9
Wine – France	629.2	664.5	606.7	607.2	689.4	679.5
Wine – Spain	293.1	299.2	262.1	254.1	342.5	358.6
Wine – South Africa	63.3	67.1	69.2	75.8	83.5	82.6
Wine – US	50.1	46.9	45.2	65.6	70.3	73.0
Wine – Austria	47.8	54.5	60.4	62.2	56.1	65.8
Wine – Australia	47.4	39.3	41.9	44.5	51.5	53.5
Wine – Chile	51.2	47.5	48.7	54.4	54.0	53.1
Wine – Denmark	28.4	31.8	40.9	33.5	31.6	38.2
Wine – Portugal	27.1	38.2	38.1	36.9	34.2	34.4
Wine – Greece	22.6	23.2	23.2	24.2	31.3	24.4
Wine – United Kingdom	7.9	7.7	9.9	11.7	14.1	17.5
Wine – Macedonia	14.8	15.6	17.5	12.7	11.5	16.1
Wine – Hungary	13.8	11.7	12.5	12.5	13.0	11.7
Wine – Netherlands	24.7	17.9	19.7	5.8	12.8	11.2
Wine – Argentina	8.3	9.9	9.5	7.9	9.3	10.4
Wine – New Zealand	3.5	3.6	3.4	5.3	7.8	9.0
Wine – Sweden	0.1	3.5	4.2	1.9	3.2	4.6
Wine – Switzerland	4.7	4.9	4.2	5.6	5.9	4.4
Wine – Luxembourg	2.4	2.7	1.0	1.9	3.3	2.9
Wine – Belgium	2.8	2.6	3.2	5.1	3.8	2.7
Wine – Croatia	2.2	2.0	2.1	1.6	1.9	2.1
Wine – Romania	4.7	3.8	3.3	2.3	2.4	1.9
Wine – Ukraine	2.8	2.2	2.2	2.1	2.0	1.8
Wine – Cyprus	0.2	0.3	0.4	4.2	2.9	0.1
Wine – Others	11.8	12.0	7.9	7.1	7.4	7.4
Wine – Total	2,086.7	2,197.8	2,118.9	-	2,406.2	2,445.9

Source: GTIS, Euromonitor International
Note: '-' indicates data not available

Source: Euromonitor 2014

Appendix 1.3.5 Sales of Wine Off- and On-Trade (Volume and Value)

Table 5 Sales of Wine by Off-trade vs On-trade: Volume 2008-2013

million litres	2008	2009	2010	2011	2012	2013
Off-trade	1,734.9	1,737.0	1,729.2	1,698.7	1,666.5	1,655.1
On-trade	390.6	389.2	387.6	376.1	372.2	368.5
Total	2,125.5	2,126.2	2,116.8	2,074.8	2,038.8	2,023.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Wine by Off-trade vs On-trade: Value 2008-2013

EUR million	2008	2009	2010	2011	2012	2013
Off-trade	5,369.1	5,454.0	5,478.8	5,611.3	5,658.8	5,702.6
On-trade	6,722.8	6,773.5	6,859.0	7,027.7	7,072.4	7,145.2
Total	12,091.8	12,227.5	12,337.8	12,639.0	12,731.1	12,847.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Source: Euromonitor 2014

Appendix 1.3.6 Sales of Wine by Price Segment

Red wine:

Table 9 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2008-2013

% off-trade	2008	2009	2010	2011	2012	2013
Under EUR0.99	14.7	14.5	14.6	14.5	14.3	13.5
EUR1 to EUR1.49	9.2	9.6	9.7	9.9	9.8	9.6
EUR1.5 to EUR1.99	22.6	22.3	22.1	21.9	21.8	22.5
EUR2 to EUR2.99	24.6	24.3	24.2	24.1	24.4	24.7
EUR3 to EUR4.99	23.0	23.3	23.6	23.8	24.0	24.0
EUR5 and above	5.9	6.0	5.8	5.8	5.7	5.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

White wine:

Table 10 Sales of Still White Wine by Price Segment: % Off-trade Volume 2008-2013

% off-trade	2008	2009	2010	2011	2012	2013
Under EUR0.99	21.5	20.2	19.5	19.0	18.6	17.9
EUR1 to EUR1.49	31.5	32.4	33.1	32.0	31.4	29.5
EUR1.5 to EUR1.99	14.7	14.8	14.8	15.6	16.3	17.3
EUR2 to EUR2.99	16.7	16.6	16.6	17.4	17.5	18.2
EUR3 to EUR4.99	10.2	10.5	10.9	11.2	11.3	11.6
EUR5 and above	5.4	5.5	5.1	4.8	4.9	5.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Source: Euromonitor 2014

Appendix 1.4.1 Interview Sylvie Camandona (Uvavins' chief of sales)

1. Depuis quand avez-vous un employé en Allemagne?
Depuis 2012

2. La dénomination Cave de la côte est-elle récente est est-elle utilisée pour le marché allemand ?
Le nom Cave de la Côte a toujours été utilisé et depuis 2012 le nom est aussi utilisé en Allemagne.

3. Comment avez-vous recruté votre employé présent en Allemagne?
Cela date d'il y a longtemps. Un organisme faisait beaucoup d'activités pour l'Allemagne et ils avaient organisé un concours en Allemagne pour motiver des vendeurs là-bas à vendre des vins suisses et cette personne ayant bien réussi. C'est comme ca qu'il avait connu le directeur d'Uvavins. Je n'étais pas personnellement dans la boîte.

4. Avez-vous des employés dans d'autres pays ?
Non, après ce sont des agents, Des importateurs qui achètent du vin et le revendent.

5. Est-ce que votre employé choisi les vins qui seront vendus en Allemagne où a-t-il des directives de votre part ?
Notre employé a fait une liste en regardant quel produit pourrait être intéressant en faisant un assortiment assez large au début quitte a resserré par la suite en regardant ce qui marche et qui ne marche pas.

6. Votre employé a donc carte blanche ?
Son assortiment a été fixé avec les vins choisis. Il ne va pas forcément prendre tous les vins de chez nous car il y a des contrats et des étiquettes spéciales qui demande un travail ici alors il est mieux qu'il aille son assortiment avec lequel il travaille.

7. Comment cela fonctionne-t-il, est-ce qu'il commande au fur et à mesure où est-ce qu'il bénéficie d'un stock sur place ?
Il a un stockage et il travaille ensuite avec sur place.

8. Est-ce que d'un pays à l'autre l'assortiment change ?
Oui car les goûts changent et quand je pars dans les salons internationaux comme par exemple Shanghai l'année passée et Düsseldorf cette année nous sommes en contact direct avec les clients potentiels et cela permet de voir les goûts de tout le monde. Il y en a qui aiment les vins moins tanniques, plus doux, l'Allemagne est un marché assez proche du nôtre car les vins allemands sont avec plus d'acidité.

9. Est-ce que vous cherchez à vendre quelque chose de similaire ou un vin différent en Allemagne ?
Les deux, il y a des Allemands qui aime le vin chilien et des Allemands qui aime le vin allemand alors nous essayons d'avoir des vins dans tous les segments de prix et dans des goûts assez différents avec des cépages traditionnels est plus internationaux.

10. Au niveau des canaux de distribution est-ce que votre employé fait ses propres choix ou lui imposer vous une certaine stratégie ?
Notre employée choisi et n'a aucune directive. Il doit essayer de développer le marché. Le but était qu'il soit rentable dans les trois ans, ce qui correspond plus ou moins à cette année.

Entre le salaire qu'il touche et les autres frais nous voyons que c'est plus compliqué que prévu alors nous laissons plus de temps car il n'est pas évident de s'implanter sur un nouveau marché.

11. Quelles sont les différentes tâches pour lesquelles votre employé est responsable en Allemagne, entre la promotion, la vente directe, la partie financière ?
Là par exemple notre employée part pour un salon dans trois jours. Alors il voyage, il essaye de présenter les vins et vu qu'il est tout seul là-bas il fait beaucoup. Il fait la facturation, certaines fois les livraisons, la prospection. C'est un peu différent d'ici où nous avons par exemple les gens de l'administration, notre graphiste qui fait les visuels, nos vendeurs. Là-bas c'est un peu l'homme à tout faire et c'est aussi pour ça que cela prend plus de temps car cela prend sur son temps de travail de faire de la prospection etc.

12. Quel est son budget par exemple pour faire la promotion, est-ce qu'il a un budget fixe?
Son budget est compris dans son salaire. Par contre il travaille aussi parfois en collaboration avec notre graphiste alors il fait certains visuels. Son salaire couvre ses factures.

13. Les promotions comme par exemple le mailing sont couvertes par ce montant fixe ?
Je ne suis pas sûr il faudrait lui demander directement.

14. Par rapport aux objectifs, votre seul but est donc de rentrer dans vos frais dans les trois ans. Mais vous n'avez pas d'objectifs de vente par rapport au marché allemand ?
Nous essayons de vendre le plus possible car le but est de motiver nos vendeurs et dans le cas où certains éléments comme le franc fort arrive nous ne pouvons pas reprocher à notre vendeur de ne pas avoir atteint les objectifs.

15. Comment motivez-vous vos employés sur place, par exemple votre employé en Allemagne ou vos agents à la étranger de manière générale ?
Par exemple au Japon je suis allé plusieurs fois, je tourne avec les vendeurs. Cela est motivant pour eux quand ils voient que l'on se déplace et que nous sommes derrière, que nous envoyons des échantillons, que nous essayons de mettre leur vins sur les concours. Par exemple nous avons un vin qui a gagné un prix au Japon et après c'est un plus pour la vente. Avec Klaus (employé en Allemagne) aussi, par exemple nous étions au salon à Düsseldorf, et de nous voir cela aide. Il est parfois difficile d'être là-bas tout seul et d'avoir affaire à plusieurs clients qui peuvent par exemple critiquer le vin suisse et que cela baisse sa motivation.

16. Comment utilisez-vous les agences de promotion Suisse comme par exemple la SWEA afin d'augmenter vos ventes à l'étranger ?
Nous faisons des projets export, par exemple comme les foires, et si cela est validé par l'OFAG la moitié est pris en charge par l'OFAG et l'autre moitié par les vignerons. C'est-à-dire que lorsque nous sommes à Düsseldorf nous payons la moitié et l'OFAG paie l'autre moitié. Tout est organisé par la SWEA.

17. Quelles sont les conditions pour être sponsorisé par le l'OFAG?
Il doit y avoir au moins trois régions vinicoles représentées. Par exemple si nous voulions aller à Prowein à Düsseldorf et qu'il y a Genève avec 10 caves et les vaudois avec 5 caves, il n'y aura pas d'aide. Mais s'il y a trois caves avec une valaisanne, une vaudoise une genevoise cela pourrait être financé. Il n'y a pas d'autres aides pour l'exportation alors nous utilisons ce service pour développer de nouveaux marchés.

18. Pourquoi avoir un employé en Allemagne et pas dans d'autres pays ?
Car l'Allemagne a un lien de proximité qui facilite des éventuels rendez-vous avec l'employé. Traditionnellement l'Allemagne était un des plus grands importateurs de vin suisse alors c'est aussi pour ça que nous avons procédé de la sorte. De plus nous n'avions pas à la base pu trouver de bonnes importateur sur place et c'est pour cela que nous avions choisi d'y avoir un employé.

19. Envisagez-vous d'établir un employé dans un autre pays ?
Non car cela demande beaucoup d'énergie à développer donc pour l'instant nous essayons d'être rentable avec l'Allemagne pour voir la suite. D'autres part si nous avons de bons importateurs et que cela marche bien, nous avons moins besoin de le faire. Par exemple au Japon nous avons un bon importateur qui est comme une sorte de petite antenne d'Uvavins.

20. Quelles sont vos principaux concurrents en Suisse ?
En Suisse principalement des vins étrangers qui se vendent à bas prix. La Suisse est un marché très concentré avec de gros acteurs qui sont Coop et Denner, alors il suffit qu'il y ait des promotions sur les vins étrangers pour influencer les ventes. Des autres coopératives sont aussi des concurrents, par exemple Provins avec les vins valaisans ou des caves comme Schenk. Mais pour les vins suisses, les principaux concurrents sont les vins étrangers qui arrivent avec des prix plus bas. Nous avons donc plus d'efforts de promotion à faire pour que les suisses continue à acheter du vin suisse et non étranger.

21. Comment vous situez-vous par rapport à une cave comme Schenk? Quelle est la grosse différence entre vous ?
La cave Schenk a une approche différente, ils ne mettent pas le nom Schenk sur les bouteilles. C'est plus une approche avec des domaines, ils ont des domaines dans toute la Suisse donc ils produisent des vins valaisans, et d'autres vins suisses. Schenk est une entreprise internationale, il y a Schenk Italie, Allemagne je pense donc ils ont aussi des vins qu'ils vendent en vrac à des prix similaires.

22. Est-ce que vous vendez, en Suisse par le biais d'un Internet ?
Oui il faut savoir qu'en Suisse il y a eu Uvavins Cave la Côte qui est la société mère et ensuite il y a Cave Cidis qui distribue seulement aux particuliers, cafés et restaurants et ensuite Cave la Côte qui vend aux revendeurs, grossistes et grandes surfaces. Alors Cave Cidis, nous avons un site Internet avec de la vente en ligne.

23. Avez-vous une plateforme de vente en ligne pour l'Allemagne ? Avez-vous prévu de le développer ?
Pour l'instant il est difficile de développer encore un site Internet car cela représente beaucoup de travail.

24. Au niveau du choix des vins dédié à l'export comment avez-vous établi votre stratégie pour les goûts et pour les prix ? Avez-vous fait un assortiment avec un peu de tout pour un peu tout le monde ?
Il y a toutes les gammes. Souvent c'est le moins cher qui part à l'export mais parfois ils aiment avoir des vins un peu plus chers et cela montre l'étendue de la diversité de la production.

25. Il y a en Allemagne une tendance à la premiumisation, avec les gens qui boivent moins mais du meilleur vin. Les gens investissent plus dans le vent et boivent peut-être plus à la maison qu'au restaurant. Avez-vous pensé à séparer les vins basiques des vins haut de gamme.

Sachant qu'un vin basique sera déjà relativement cher sur le marché allemand ? N'y aurait-il pas une différence à faire entre un vin Suisse est un très bon vin Suisse afin de se positionner sur un marché plus haut de gamme ?
Notre employé fait la différence car lorsqu'il vend il a ses différentes gammes elle selon la clientèle il va proposer des vins entrée de gamme ou plutôt vin premium. Mais le but est quand même de vendre beaucoup de bouteilles alors nous préférerons vendre plus devant moi cher que seulement quelques bouteilles de vin Premium.

26. Comment expliquez-vous des grosses baisses dans les chiffres de l'export en 2013 par rapport à 2014, avez-vous fait de nouveau partenariat ?
Les chiffres sont faibles alors il suffit qu'un client ne recommande pas 10,000 bouteilles, et il y aura directement un fort impact. En 2014 nous avons à nouveau marché, la chine.

27. Comment expliquez-vous la différence entre le chiffre d'affaire 2013 et 2014 de l'entreprise ?
Il y a eu la grêle en 2013 ce qui veut dire qu'il y a eu moins de récoltes et nous pouvons donc vendre moins de vins. Le chiffre d'affaire est donc plus bas mais les coûts sont aussi plus bas. Les stocks varient beaucoup, par exemple il y a des années où nous avons presque un stock de marge et cette année nous sommes trop court et nous cherchons des vins à vendre. Nous dépendons de la nature alors il n'y a pas de règle.

Appendix 1.4.2 Uvavins: Revenues by Category 2011-2014

		Turnover 2011	Turnover 2012	Turnover 2013	Turnover 2014
HMFGCD	FZAKCD	CA2011	CA2012	CA2013	CA2014
101	0SO	16827.21	14356.16	18573.3	21661.23
101	1GR	19098748.94	17820971.65	19707504.85	19788164.45
101	3RV	889067.35	542380.69	663756.75	627738.75
101	5PA	145682.56	144526.43	143270.2	133168.16
101	9EX	99610.75	229942.25	211892.95	245411.05
101	9IS	2538012.4	2323412.5	2388825.25	2137049.8
200	0FE	345757	314108.71	296545.65	223879.55
200	0SO	2180403.41	2172011.67	2220596.13	1858184.73
200	1GR	139198.7	96734.7	88889.45	82568.15
200	3RV	842060.79	756153	740347.24	789470.16
200	4CA	3802989.48	3585456.03	3546262.35	3432937.21
200	5PA	2753549	2584982.17	2490963.17	2585348.95
200	9IS	60526.15	201348.2	62775.75	44409.7
	Total:	32912433.74	30786384.16	32580203.04	31969991.89
Legend of the table					
101	Uvavins-Cave de la Côte (Wholesaler, Retailer, Export)				
200	Cidis (Individuals, Restaurants)				
0SO	Shareholders				
1GR	Wholesalers				
3RV	Retailers				
4CA	Cafés				
5PA	Individuals				
9EX	Export				
9IS	Inter-society				
0FE	Fenaco				

Source: Camandona 2015

Appendix 1.4.3 Uvavins: Revenues from Export 2011-2014

Client name	Country	Turnover 2011	Turnover 2012	Turnover 2013	Turnover 2014
CAADDR	CALOCA	CA2011	CA2012	CA2013	CA2014
ALCOOLS QUEBEC	CANADA		10'492	5'962	14'115
BOND & CO LTD	JAPON	7'560	5'079		2'213
ALCOTRADE TRUST JAPAN INC.	JAPON	48'318	62'545	70'113	88'961
CAVAILLE SA	France	3'387			
AMB.SUISSE PRAGUE	TCHEQUIE	0	64	558	
SWISS CELLARS /CROLLA L.	USA	13'929	10'728	14'758	11'424
CHILE WEIN IMPORT / DE ZULPICH	Allemagne	6'595			
PAUL THEVENIN SARL	FRANCE		51'420	21'796	
LIQUOR CONTROL BOARD ONTARIO	CANADA	15'840	13'932		
SWISS WINE PROMOTION EXP	Genève		0		
AMB.SUISSE BANGKOK	THAILANDE	1'092			
SCHWEIZERISCHER OBSTVERBAND		750	750		
WINE WORLD HOLLAND BV	HOLLANDE	1'944		1'058	2'819
AMB.SUISSE TORONTO	CANADA	124			
CASA VINICOLA BOTTER CARLO &		0			
AMB.SUISSE KOPENHAGEN	DANEMARK	72			
AMKA AS	NORVEGE		26'803		
JUERGENSEN KRISTIAN			150		
THE MOSIMANN COLLECTION	ANGLETTERRE JO		8'900		
MISSION SUISSE BRUXELLES	Belgique		2'376		
CDLC-UVAVINS DEUTSCHLAND	Allemagne		24'672	53'246	69'806
THE SWISS WINE STORE LTD	Hong-Kong		2'040		
NICK DOBSON WINES	ANGLETTERRE		5'692	2'616	7'254
LA VINOTHEQUE HONG KONG LTD	Hong-Kong		4'086	4'780	2'379
AMB.SUISSE BANGALORE-INDIA	INDE			72	
AMB.SUISSE ASTANA-KAZAKHSTAN	KAZAKHSTAN			110	
DIONYVIN SPRL	BELGIQUE			7'334	4'069
SUISSE TRADITIONS LIMITED	COREE			29'596	7'609
XUANTAI INTERNATIONAL IM/EX CO	CHINE				22'056
SUGIYAMA SHOJI CO.,LTD	JAPON				6'149
AMB.SUISSE BAKU	Bern				1'754
UESST SRL					4'803
	Total:	99'611	229'729	212'000	245'411

Source: Camandona 2015

Appendix 1.4.4 Uvavins Germany Report 2015

CAVE DE LA CÔTE

2015 kommt

2014 geht

CAVE DE LA CÔTE
Depuis 1929
Grands Vins de La Côte Vaudoise

Rückblick auf 2014

- 2014 war das zweite vollständige Jahr der Ende 2012 neu gegründeten „Cave de La Côte Uvavins-Deutschland- GmbH" Jetzt können die ersten beiden vollen Jahre verglichen werden.
- Im ersten Jahr wurde durch Kontakte und Anschreiben auf die Cave de La Côte Uvavins Deutschland GmbH aufmerksam gemacht. Ein Startumsatz von 52.000€ aus dem Stand hat zum Jahresende gezeigt, das es möglich ist, Weine der Cave de La Côte in Deutschland zu platzieren. So kann diese Zahl durchaus positiv gesehen werden, als Basis für mehr Akzeptanz und Distribution.

  2014 konnte genutzt werden um, aufbauend auf den in 2013 gemachten Erfahrungen, den zahlreichen Gesprächen mit dem Handel und den Kontakten bei Ausschanketerminen mit den Endkunden, die Ausrichtung der Deutschland GMBH für die kommenden Jahre an die Erwartungen der jeweiligen Zielgruppen anzupassen. Leider hat die Politik zum Frühjahr bis zum Winter des Jahres für eine gewisse Anti-Schweiz Stimmung gesorgt.
- So kommt die strategischen Neuausrichtung passend - der neue, frische Auftritt der Cave de La Côte Morges, gefällt, was auch bei den aktuellen Motiven unserer Roll Ups sichtbar wird.

- RÜCKBLICK 2014 DIE WETTBEWERBE
- Die Erfolge bei Wettbewerben und Prämierungen wie mehrfach MUNDUS VINI GOLD und Gold bei der BERLINER WEINTROPHY verdanken wir den Winzern und Önologen der Cave de La Côte Morges, dafür an dieser Stelle ein herzliches Dankeschön aus Deutschland, diese Qualitäten hinterlassen Eindruck im Handel und beim Verbraucher.
- Natürlich auch einen ganz besonderen Glückwunsch für die tolle Prämierung im November 2014 für die Siegerurkunde „AUGUSTE CHEVALLEY BRUT"

Berliner Wein Trophy 2014

BEACHTENSWERTES 2014:
PRO WEIN
Unser MESSESTAND hat gefallen.

Zahlreiche Kontakte wurden geknüpft und das Gewinnspiel führte zu dem gewünschte Plus an Aufmerksamkeit.

2015 jedoch steht voll im Zeichen des neuen Auftritts unserer:

CAVE DE LACÔTE

Auf Sonderaktionen wie z.B. Gewinnspiele verzichten wir daher.
CAVE DE LA CÔTE STEHT IM MITTELPUNKT aller Aktivitäten !

Beachtenswertes 2014: **WEINWERK**
Die zur Dr. Oetker Gruppe gehörende Handelsfirma Weinwerk, hat nach der kritischen Verkostung zwei Weine der La Côte fest im Sortiment.
Diese beiden Weine und unser Doral, wurden bereits in drei Frischeparadies-Märkten in Köln, Essen & München von Herrn Immes vor Ort promotet.
München löste daraufhin eine direkte Order von 120 Fl. Doral aus.
Wir denken das auch dieser Wein ab 2015 Bestandsteil der festen Listung wird.
Die Märkte:

Unser Katalogeindruck:

BEACHTENSWERTES 2014:
EINMALIGE **HIT SONDERAKTION** ZUR 2015er REITER WELTMEISTERSCHAFT IN AACHEN - **GASTLAND SCHWEIZ** – Aufbau in 2 Märkten – 12 Weine von uns

FAKTEN 2014
Aufteilung der Kundengruppen:

- Ca. 40% private Kunden im direkten Geschäft geworben auf Messen und durch Anzeigen in der Schweizer Revue.
- Ca. 15% LEH Einzelhandel. (einschl. CITTI)
- Ca. 25% Fachhandel
- Ca. 5% Gastronomie direkt Kunden.
- Ca. 15% Grossisten/ Versender z.T. m. Fachhandel. (Einschließlich Chefs Culinar)

UMSATZVERGLEICH in Zahlen 2013 zu 2014

Jmsätze Monatsvergleich

.AGERGESCHÄFT SCHWEIZ CAVE DE LA CÔTE

	2013	2014
Januar	5.066,26 €	3.884,10 €
Februar	1.725,69 €	6.155,16 €
März	4.602,26 €	13.932,32 €
April	5.407,49 €	7.789,00 €
Mai	553,36 €	3.624,12 €
Juni	4.227,61 €	6.874,72 €
Juli	2.470,42 €	6.800,28 €
August	1.513,52 €	1.353,25 €
September	5.083,07 €	8.954,97 €
Oktober	4.364,32 €	7.217,35 €
November	12.999,55 €	8.980,31 €
Dezember	4.055,95 €	7.200,42 €

UMSATZVERGLEICH ALS DIAGRAMM

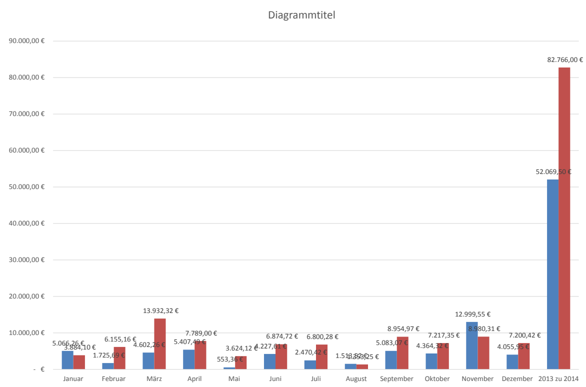
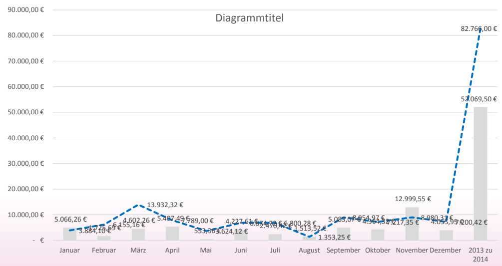


Diagramm Säule 2013 Pfad 2014



NOCH ETWAS BEACHTENSWERTES AUS 2014:

Das Finanzamt Düren hat 2014 die Cave de La Côte Uvavins Deutschland GmbH geprüft und keine Beanstandungen gehabt!

AUFGABEN 2015: Kundenbindung durch ....

Auch wenn es eigentlich klar ist, einer der wichtigsten Faktoren beim Weinkauf ist der Endkunde. Hier muss erreicht werden, dass der Endkunde sich für Weine CAVE DE LA CÔTE interessiert.
So ergibt sich daraus für uns die Schussfolgerung, den Händler zu motivieren, unsere Weine optimal zu platzieren, unsere Weine zu lieben und sich für die Weine der CAVE DE LA CÔTE stark zu machen.

Aus diesem Grund wird 2015 für die wichtigsten Kunden mehr Zeit eingeplant, um in regelmäßigen Abständen über das aktuelle Sortiment und Aktionen zu sprechen. Dazu gehört auch, dass wo immer es machbar ist, *Kleinaufbauten von einigen Kartons ist zu erreichen, das ist Zusatzumsatz, Ideen und die Plätze finden, steht neben der neuen Ausstattung bei den Händlerbesuchen im Mittelpunkt.*

AUFGABEN 2015:
Wie binden wir 2015 bestehende & neue Kunden an uns.

Bedingt durch die gemachten Erfahrungen zeigen sich folgende Ansätze auf:

Verstärkte Aktivitäten auf dem direkten Weg mit Anschreiben unter Berücksichtigung des neuen Auftritts der CAVE DE LA CÔTE.

Teilnahme an kleineren und günstigeren „Feinkostmessen" um so mehr Endkunden zu gewinnen; 2015 erstmalig in Hamburg und Düsseldorf.
Wenn möglich unter Beteiligung von Fachhändlern vor Ort an der Messe.

Damit verbunden ist der Verzicht auf die Forum Vini Messe in München, mit dem hier eingesparten Budget können die beiden vorgenannten Messen gestemmt werden.
Die bisher kaufenden Kunden der Forum Vini werden direkt angeschrieben.
Verstärkte Unterstützung vor Ort für interessierte Fachhändler, mit fertigen Werbeunterlagen und Plakaten. Bisher wurden z.B. die Broschüren von der GmbH selber am Drucker erstellt. Das war sehr flexibel aber sehr zeitaufwendig. Das aktuelle Preisangebot der Druckerei List ermöglicht einen professionellen Druck der Unterlagen, mit einem freien Feld für individuelle Kundeneindrucke - Angebot siehe Folgeseite.

AUFGABEN 2015: ANGEBOT - KOSTENMANAGEMENT

Angebot: Sehr geehrter Herr Herr Immes,
anbei das Angebot nach Ihrer Anfrage Dez. 2014.
Die Preise sind in rot zu Ihren Angaben beigefügt und verstehen sich netto ohne MWST.

Karten wie z.B. beim Gewinnspiel 2014
29,7 x 10,5 cm längs genutet plus 3mm Anschnitt je Seite
14,8 x 21,0 cm horizontal genutet plus 3mm Anschnitt je Seite
Kosten je Stk. bei einer Auflage: 50 = 19.-€ / 100 = 32.-€ / 500 = 110.-€

Imagemappe immer gleicher Deckel; variabler Einsatz durch individuelle Einleger für alle Zielgruppen:
Deckblatt / Umschlag:
Umschlag wie eine Mappe, seidenmatt bedruckt, in A4 zur Aufnahme von 8 – max. 12 A4 Innenseiten mit je 120gr.
Mappe 250 g/m² genutet und mit einer selbstklebenden Ecke versehen zum Einlegen der Seiten.
ab 50 Stk. 0,85€ /Stk.

Expertisen oder sonstige A$ bedruckte Seiten farbig:
je 100 A4 seidenmatt = 16,-€ je Sorte bei 200 = 28.-€

Neu Sortimentsliste Format wie gehabt:
Doppelt A4 0,28€ wie gehabt bei Abnahme von 500 - 750 Stk.

Sonstige Seiten z.B. Erklärungen, jeweils auf A4 Vorder- und Rückseite bedruckt
Beispiele Themen: Seeuferweine, Emblem, Basic, Tradition, Auflage je ca. 100
100 Format A4 18,00 € / je Vorlage

KOSTENMANAGEMENT:
Bei diesen Preisen kostet eine Mailingaktion an 300 Adressen:
Druck ca. 90.-€ plus Porto 135.-€ (Karte) bzw 186.-€ Porto (als Brief).

KOSTENMANAGEMENT TEIL 2:

Bedingt durch die Einsparung von zwei Anzeigen bei der Schweizer Revue zu jeweils 355.-€ netto, können so bei gleichen Budgetkosten:

2 Mailingaktionen im Kartenformat
& 2 Mailingaktionen im Briefformat
in 2015 durchgeführt werden.

Es hat sich gezeigt, dass mit regelmäßigen Anschreiben die Kundenbindung auf Dauer gestärkt wird. Dieser Effekt tritt aber erst nach einigen professionellen Anschreiben auf.

Thema Händler

1. Anschreiben: Einladung Pro Wein die „neue CAVE DE LA CÔTE“ stellt sich vor
2. Anschreiben: Die neuen Jahrgänge der CAVE DE LA CÔTE
3. Anschreiben: CAVE DE LA CÔTE Weinlese Aktionen für den Spätsommer- Herbs
4. Anschreiben: Feiertagsweine der CAVE DE LA CÔTE

Für die weiteren Zielgruppen werden die Themen entsprechend gesetzt.

Ziele 2015:

Das neue Logo, der frischere Auftritt und die Positionierung der Kernaussage CAVE DE LA CÔTE fand auch bei den ersten Vorstellungen in Deutschland Zustimmung.
Mit diesem neuen Logo der Schweizer -Muttergesellschaft in Morges tritt die GmbH in Deutschland ab sofort frisch und modern auf.
So ausgestattet wollen wir in 2015 erreichen:

Ausweitung im Handel bei mittelgroßen Grossisten, wie Globus oder Norma.
Umsatzsteigerung erneut um die gleichen Prozente wie 2014
Verstärkte Kundenwerbung beim FHDL mit Gastronomiebelieferung
Konzentrierte Aktionen an Endkunden per Mailing
Sortimentsersweiterung bei Weinwerk
Teilnahme an Chefs Culinar Messen(CITTI)
Teilnahme an Feinkostmessen mit überschaubaren Budget
Schweizer-“Partnerfirmen“ für gemeinsame Aktionen gewinnen

Ich bedanke mich für Ihr Vertrauen und freue mich auf das nächste Jahr,
ein Jahr mit vielen Herausforderungen, oder anders gesagt: Ein echtes Weinjahr!
Geduld und feste Ziele, das führt wie im Weinkeller langfristig zum Erfolg.
Klaus Immes
Auf der nächsten Seite habe ich für Sie einige 2014er Impressionen vorbereitet.

WIR KÖNNEN NICHT NUR „SCHWEIZ

WIR KÖNNEN CAVE DE LA CÔTE

Auf ein erfolgreiches 2015

DAS WÜNSCHT IHNEN UND ALLEN IM TEAM DER

CAVE DE LA CÔTE

DANKE FÜR IHR VERTRAUEN
Klaus Immes
Ihr Handels- und Vertriebskoordinator in Deutschland

Source: Immes 2015

Appendix 1.4.5 Price List Uvavins Germany

Preisliste 1/2015

Cave de La Côte Uvavins Deutschland GmbH - Ihr direkter Kontakt zu den eleganten Weinen der Genussregion La Côte - Waadtland - Schweiz

Nettopreisliste - Handel - ab 36 Fl. frei Haus - ab 120 Fl. greift die Mengenstaffel - Liste minus 5%

Letzte Aktualisierung: März 2015

Wein - Nummer	Jahrgang	Bezeichnung	Art	RZ*	S*	Alk.%*	Inh. Fl.	Netto je Fl.	Best. Kart.
		BASIC & SWISSNESS							
8349	13/14	Chasselas Romand vdp "Papillon"	weiss	3,4	3,37	12,2	750ml	4,45 €	
8313	13/14	Chasselas Suisse "Swissness"	weiss	1,5	3,45	12,2	750ml	4,75 €	
8374	13/14	Rosé Gamay Suisse "Swissness"	rosé	6	4,69	12,7	750ml	5,35 €	
8393	12	Gamay Suisse "Swissness"	rot	0	4,76	12,8	750ml	5,35 €	
8900	13/14	Pinot Noir Suisse "Swissness"	rot	0	4,59	13,5	750ml	5,35 €	
		TRADITION							
2105	12	Coteau d'Aubonne, Tradition - Chasselas	weiss	0	3,54	12,5	750ml	*7,45 €*	
3295	13/14	Chasselas Vieilles Vignes, Morges La Côte aoc	weiss	0	3,58	12,4	750ml	*8,45 €*	
5265	12	Du Baril Cuvée Spéciale, La Côte aoc	rot	0	4,75	13,5	750ml	*8,45 €*	
7581	13	Morges Rosé du Salvagnin aoc, Bois Gentil	rosé	4,6	4,09	12,2	750ml	*6,45 €*	
		PREMIER GRAND CRU							
1533	13	Château Malessert, Premier Grand Cru, Féchy	weiss	3,8	3,74	12	750ml	*12,85 €*	
		COLLECTION EXPRESSION							
4662	13	Doral Expression, La Côte aoc	weiss	4,5	5,66	13	750ml	*9,95 €*	
4670	12	Sauvignon Blanc, La Côte aoc	weiss	4,8	6,22	13	750ml	*10,45 €*	
5095	13	Gamay Vieilles Vignes, La Côte aoc	rot	0	4,76	12,6	750ml	*9,45 €*	
7430	12	Garanoir, La Côte aoc	rot	0	4,49	14,1	750ml	*8,95 €*	
7420	13	Gamaret, La Côte aoc	rot	0	4,95	13,95	750ml	*10,95 €*	
		COLLECTION BERNARD RAVET «PREMIUM»							
4640	12	Pinot Blanc, La Côte aoc	weiss	1,8	5,8	13,2	750ml	*11,45 €*	
7425	12	Gamaret, La Côte aoc	rot	0	5,03	13,7	750ml	*14,45 €*	
7444	11	Bernardin, Merlot La Côte aoc	rot	0	5,36	14,1	750ml	*18,95 €*	
7445	10	Gama-Belle, Gamaret La Côte aoc, vin muté	rot	91,5	4,6	15,4	750ml	*18,95 €*	
		*M O U S S E U X - V I N ***							
4871	entf.	Bleu Nuit, Mousseux de Romandie vdp	perlend	62,3	5,9	7,3	750ml	*9,95 €*	
4881	entf.	Auguste Chevalley, La Côte aoc / Chardonnay	perlend	9,7	5,5	11,9	750ml	*9,95 €*	
		SEEUFERREGIONEN WAADT & VALAIS							
3246	12/13	Morges, Chasselas La Côte aoc	weiss	1,1	3,4	12	750ml	*5,45 €*	
4664	12	Morges, Doral La Côte aoc	weiss	2,5	5,3	13	750ml	*5,95 €*	
6203	12/13	Morges, Pinot Noir La Côte aoc	rot	0	4,6	13	750ml	*5,95 €*	
7469	12	Morges, Gamaret La côte aoc	rot	0	4	13,5	750ml	*6,45 €*	
6605	13/14	Fendant, du Valais aoc	weiss	0	3,2	12	750ml	*5,85 €*	
8612	13	Dôle, du Valais aoc	rot	0	4,5	13	750ml	*5,95 €*	
		DESIGN COLLECTION EMPREINTE							
4530	12	Chardonnay Empreinte, La Côte aoc	weiss	3,4	5,13	13,1	750ml	*9,75 €*	
7496	12	Merlot Empreinte, La Côte	rot	0	4,99	13,9	750ml	*9,75 €*	
		COLLECTION EMBLEM							
4663	13	emblem Doral, Vaud aoc	weiss	2,5	5,2	13	750ml	*6,45 €*	
4675	12	emblem Sauvignon Blanc, Vaud aoc	weiss	3,2	7,5	13	750ml	*6,95 €*	
4721	12	emblem Pinot Gris, Vaud aoc	weiss	5	5,1	13	750ml	*6,95 €*	
7448	12	emblem Garanoir, Vaud aoc	rot	0	4,9	13,5	750ml	*6,45 €*	
7447	13	emblem Merlot-Gamaret, Vaud aoc	rot	0	5,1	13,5	750ml	*6,95 €*	
		* Diese Angaben basieren auf Durchschnittswerten der letzten Jahre und können, je nach Jahrgang und Füllung, leicht abweichen. ** Die Sektsteuer ist enthalten							

Alle Weine enthalten Sulfite, die Abgabe für Verkaufsverpackungen ist über *Interseroh* reguliert. Die Weine werden ab Lager Deutschland frei Haus ab 36 Fl. - Festland - zugestellt. Inselzuschläge bitte erfragen. Das Angebot ist freibleibend der Verfügbarkeit. AGB und LMIV Angaben als Download unter: www.uvavins.de

Gerichtsstand ist Düren NRW, Sitz der GmbH. Kauf auf Rechnung. Zahlungziel 14 Tage 2% Skonto, oder 30 Tage ohne Abzug. Staffel- bzw. Palettenpreise bitte erfragen.

Preise netto zuzüglich gesetzl.. MwSt. Lieferungen bis 48 Fl. erfolgen per DPD in Versandkartonage, ab 49 Fl. per Spedition. Lieferzeit ca. 4 Werktage nach Auftragseingang.

Sie erreichen uns unter den angegebenen Daten, gerne auch per Direktruf an: Klaus Immes Handels- und Vertriebskoordinator.

Cave de La Côte Uvavins Deutschland GmbH, Waldstrasse 34, 52391 Vettweiß, Geschäftsführer - Thierry Walz
Handels- & Vertriebskoordinator - Klaus Immes
Tel.: 02424 901181 www.uvavins.de Direktruf 0178 5348271 info@uvavins.de Fax: 02424 901180

Source: Immes 2015

Appendix 1.4.6 Interview Klaus Immes (20.03.15)

1. Für die "Aufteilung der Kundengruppen", in die Kategorie Grossisten/Versender das ist geschrieben: Einschliesslich Chefs Culinar. Was ist die Unterschied zwischen Chefs Culinar und Gastronomie Kunden?
Chefs Culinar ist ein Großhändler, welcher als Lieferant zu 90% HOGA = HOtel & GAstronomie beliefert

2. Wissen Sie Umsätze waren kleiner im Januar und November 2015 im Vergleich mit 2014?
Bewerten Sie immer ein Quartal, es gibt z.B. Erstaufträge von neuen Kunden oder Aktionen bei Kunden, die das Bild im Monatsvergleich oft stark verschieben.

3. Wann sind die Messen während das Jahr?
Bisher immer im Februar Weinmesse Berlin; ob wir da nächstes Jahr teilnehmen muss noch geklärt werden. Immer im März die PRO WEIN in Düsseldorf. Neu 2015 eine Gourmet-Endverbrauchermesse Savoir-Vivre Ende März in Hamburg, und im Spätherbst, eine Gourmet- Endverbrauchermesse auf der Gourmetmeile Königsallee in Düsseldorf. Bisher im November die Weinmesse München, werde ich aber dieses Jahr nicht belegen Kosten-Nutzen nicht gegeben, war wichtig um Erfahrung zu sammeln, aber die Kosten sind im Vergleich zum Ergebnis zu hoch, es konnten zwar Endkunden als Stammkunden gewonnen werden, wie auch in Berlin, aber nicht im von mir gewünschten Umfang, jedoch verblieben davon fast 50% als treue Kunden.

An die Stelle der Messe München, sind die beiden neuen Gourmetmessen als Ausgleich in 2015er getreten. Wenn in Hamburg und Düsseldorf eine bessere Reichweite erzielt wird, dehne ich diese Art der Messen 2016 weiter aus. nach Möglichkeit zusammen mit Kunden von uns, die Feinkost anbietet und wir den Wein.
Zudem werden diese Jahr Hausmessen bei Fachhandelskunden von mir personell unterstütz, Termin in Aachen; Hamburg, Berlin, Braunschweig und weitere stehen schon fest. Zudem versuche ich bei CHEFS CULINAR eine Hausmesse mit zu belegen, aber da stehen die Lieferanten Schlange.

4. Und wie viel Zeit pro Jahr haben Sie eine Werbung in die Schweizer Revue?
Dieses Jahr ist nur 1 Anzeige vorgesehen, es waren die beiden letzten Anzeigen 2014 sehr schlecht platziert und wir bekamen keinen Einfluss auf die Platzierung, daher auch kein Erfolg, im Gegensatz zu den ersten Anzeigen.

5. In die "Aufgaben 2015", Sie haben geschrieben, dass Sie die Händler zu motivieren wollen. Wie wollen Sie das machen?
ANTWORT KOMMT SPÄTER DA GIBT ES VIELE ANSÄTZE.

6. Noch einmal in "Aufgaben 2015", es gibt dieses Plakat (Bild) an die rechte Seite und meine Frage ist: Was ist die Nachricht dass Sie geben wollen? Mit andern Worten, was ist die Positionierung?
BITTE BILD SENDEN DAMIT ICH GENAU DARAUF ANTWORTEN KANN

7. Wissen Sie ob die Mailingaktion wirklich effizient ist? Haben Sie etwas mit Internet geplant?
MAILINGAKTIONEN MIT MEHR ALS 5% Rücklauf sind bereits als gut zu bewerten, das haben wir. Internet ist ein Thema für unsere Kunden, aktuell werden soeben bei einem Großkunden mit meiner Unterstützung 2 unserer Artikel aktiv eingestellt und dann beworben, sobald die Seite fertig ist erhalten Sie den Link.
Wir präsentieren uns auf www.uvavins.de Dort wird Zug um Zug modernisiert. So haben bereits alle Expertisen das neue Logo der Cave de La Côte (bis auf die Weine, welche aus dem Sortiment gehen). Händler können sich die Angaben LMIV und sonstige Hinweise und Texte zu den Weinen ausdrucken, Endkunden können sich informieren.

Evtl. folgt später eine Verlinkung zu guten Händlern, was aber nicht immer gut ist, denn so kommt es zu Preisvergleichen durch die Endkunden und da gibt es große Unterschiede bei den Händlern.
GRUNDSATZ IST: Wir machen aber unseren Händlern im Net keine Konkurrenz.

8. Ich habe nicht verstanden was Sie meinen mit: " Verstärkte Kundenwerbung beim FHDL mit Gastronomiebelieferung". Könnten Sie das erklären: FHDL mit Gastronomiebelieferung?
Das sind Fachhändler, welche überwiegend HOGA beliefert z.B. Chefs Culinar. So eine Termin mit einem anderen FHDL mit Gastronomiebelieferung in Mitteldeutschland, wurde auf der diesjährigen PRO WEIN vereinbart, im Herbst 2015. Dazu gehören gezielte Einladungen in seinem Einzugsgebiet Präsenz vor Ort zu seiner Hausmesse.

9. "Ausweitung im Handel bei mittelgrossen Grossisten, wie Globus oder Norma". Wie wollen Sie das machen?
Über die Kontaktanbahnung über dem Zielkunden bekannte Persönlichkeiten der Weinszene und dezente Empfehlungen über Firmen die dort gelistete sind. So wurde auf der Messe in Berlin ein Kontakt zu einem national gut gelisteten Feinkosthändler aufgenommen um zur Weihnachtssaison eine Verbundaktion vorzustellen. Zudem verstärkte Informationen über uns mit Musterversand und Informationen mit zur jeweiligen Jahreszeit passende Aussagen über uns.

Appendix 2.2.1 Interview of Pierre Thomas (06.05.15)

Que pensez-vous des opportunités développées dans les points 2.1.1 à 2.1.7? Quels sont les pours et les contres? Selon vous, quelles sont les opportunités qui ont le plus de potentiel et lesquelles n'en ont pas ?

2.1.1
Les Suisses n'ont pas eu l'habitude de faire du marketing pour vendre leur vin, ils regardent ce qu'il se fait ailleurs et tentent de faire la même chose. Pour prendre l'exemple du Japon, nous sommes allé il y quelques années pour y présenter des vins et Pierre Keller était très fâché de ce que Uvavins vendait au Japon. L'image des vins suisses (de la Côte) au japon était des vins bons marchés. Donc l'entreprise prenait une bouteilles qui se vent à 5 francs ici et la revendait 15-20 francs là-bas. Cela restait dans une gamme Suisse très bon marché. Pierre Keller voulait donner une image haut de gamme et es Japonais connaissait que de la « piquette ». Les japonais sont prêts à payer la rareté comme pour une montre, une montre suisse est cher, un vin suisse aussi. Le chocolat c'est pareil là-bas, avec par exemple une chocolaterie Blondel en plein Tokyo. C'est vrai qu'en regardant la liste des produits proposés par Uvavins, ils y vendent n'importe quoi. Ce qu'il faut savoir c'est que Uvavins est tout à fait outillé pour vendre des vins haut de gamme, avec par exemple toute la gamme Bernard Ravet.

On attaque le marché allemand, comme les allemands attaquent le marché Suisse. Nous avons des relations économiques avec l'Allemagne, avec par exemple une société à Martini qui est liée avec Weinwelt en Allemagne. L'idée de viser des vins haut de gamme est tout à fait en accord avec ce que veut faire Swisswine Promotion, qui veut en principe exporter seulement des vins haut de gamme car il est plus facile de convaincre des amateurs de vins avec des produits originaux que des buveurs de vins lambda qui n'y connaissent rien du tout, surtout avec la concurrences des vins du nouveau Monde etc.

C'est un changement radical pour une coopérative comme Uvavins, et c'est vrai qu'ils essaient de vendre des vins qui se vendent mal en Suisses là-bas. Les Allemands sont très sensibles aux prix mais la Suisse ne peut dans tous les cas pas répondre à une demande de masse alors la Suisse a meilleur temps de se focaliser sur une niche.

2.1.2
En dehors du critère prix en Allemagne, le premium ne va que chez les spécialistes (non chez un grossiste traditionnel). Il y a par exemple les Jack Depot, qui sont d'ailleurs affilié é un grand groupe de Hambourg et qui détient des circuits d'œnothèques et un commerce de vin à Zürich (Global Wine). On pourrait imaginer que les Jack Depot s'intéressent aux vins Suisses, il y en tout un réseau en Allemagne, 50 ou 60. Ils vendent des vins, principalement plutôt bons marchés mais leur grand truc est de faire déguster le vin, avec une grande organisation. Si le client est content il part avec son carton, alors il y toute une stratégie commerciale. Je pense que c'est la seule manière de vendre le vin suisses, de faire goûter le vin et que les gens partent avec s'ils le trouvent bons. Avant de tout expliquer sur le vin, le but de est de goûter et s'il plaît, on peut expliquer.

Je ne crois pas du tout au réseaux de hard discounters pour les vins suisses, car l'image n'est pas la même. Vous aurez un problème d'image, si vous voulez vendre des vins premium et que la seule image que les gens ont est celle des supermarchés avec une image bas de gamme, vous cassez l'image. A la limite il faudrait vendre les vins suisses comme des vraies raretés. Un surplus de fendant a été vendant au sud de l'Allemagne il y a quelques années dans un supermarché et cela a fait un énorme scandale. Ce n'est pas ce jeu la qu'il faut jouer sur les marchés étrangers, la tentation est énorme mais l'histoire prouve que c'est mauvais pour l'image des vins suisses.

2.1.3
Je ne suis pas convaincu que cela marche vraiment. J'ai l'impression que cela peut marcher par exemple pour les grands vins connus comme les bordeaux, vous comparez et vous achetez sur des sites internet spécialisés, ca c'est simple. Mais pourquoi acheter un vin suisse totalement inconnu ? Le système par exemple de Qoqa.ch arrive à vendre des vins inconnus et cela fonctionne, donc un site similaire pourrait fonctionner en Allemagne mais un site, dédié exclusivement aux vins suisses en Allemagne, je pense que vous n'aurez aucun client. Cela peut seulement marcher si cel est inséré dans une démarche commerciale originale, mais avec un catalogue de vin simple, aucune chance ! Pour contourner l'obstacle de la méconnaissance é l'étranger, il faut que le vin soit bon, et pour cela il faut goûter le vin. La dégustation est la seule solution, quand le client ne connaît rien. Internet est intéressant seulement quand vous connaissez déjà le vin.

2.1.4
L'Autriche a su démontrer les bénéfices de ses vins grâce au « coup marketing » provoqué par le scandale des vins autrichiens, dans les années 70 avec les gens traités à « l'antigel ». Cela a permis à l'Autriche de prouver que les vins ont été améliorés etc, Personne ne sait que la Suisse fait du vin. Alors qui va être incité à acheter du vin, car il y a un petit drapeau dessus ? Swisswine a fait toute une campagne graphique avec un graphiste connu, et ils ont développé une collerette avec une croix suisse stylisée. Il est existe donc une collerette, officielle. Le drapeau autrichien est une mesure officielle qui a été lancée alors en Suisse cela serait très dangereux que l'ont multiplie les symboles. Si tout le monde fait son symbole suisse, cela serait très mauvais. Il faut se rallier à Swisswine, qui représente tous les vins suisses.

La SWEA et Swisswine vont fusionner alors il es temps de tous travailler ensemble. Par exemple à ProWein, il y a déjà un stand Swiswine, et ils mettent la collerette à disposition. Thierry Walz est au coeur de tout ca, il est au courant car il est impliqué dans ces diverses associations. Mais Uvavins continue de jouer les francs tireurs, je trouve très important qu'Uvavins colle ce symbole sur les bouteilles, il y une terrible inertie.

2.1.5
C'est tout à fait envisageable, mais je vous rappelé que les allemands ont décidés de s'attaquer au marché Suisse avec précisément les cépages présents en suisses comme le Pinot noir. Le but est de démontrer que leur pinot noir est très bon, ils ont par exemple gagné des médailles d'or au mondiale du Pinot à Sierre grâce é leur bonne conditions climatiques ces dernières années. Ils se tablent sur des vins que les suisses ont l'habitude de boire. On peut aussi vendredi d'autres cépages que les allemands n'ont pas. On peut d'abord faire déguster un pinot, que l'allemand connaît et ensuite lui faire essayer un autre vin. S'il faut expliquer tout l'histoire du Gamaret Garanoir etc c'est compliquée, autant faire déguster le vin et s'ils aiment, on leur explique l'histoire. Vendre du pinot noir aux allemands est un hameçon intéressant car ils connaissent le cépage. Il faut convaincre les allemands à partir de cépages qu'ils connaissent déjà et pourquoi pas ensuite leur proposer quelque chose de plus original.

2.1.6

Il y l'axe traditionnel et l'axe moderniste. Je pense qu'attaquer l'Allemagne avec des fromages suisses me semble cohérent, et associer le fromage et le vin. C'est un peu traditionnel et « gnan gnan » mais les fromages suisses sont reconnus en Allemagne. L'association est intéressante, pas forcément que du chasselas, il faut offrir une panoplie de vins. IL faut promouvoir la diversité des vins et fromages. Cet axe traditionnel est seulement moi pas totalement faux.

L'autre axe est la cuisine plus inventive, il y a déjà par exemple une ambassadrice des vins suisses en Allemagne avec Swisswine, une cuisinière à Cologne. C'est une femme qui a écrit de nombreux livres et elle s'est beaucoup investie dans les vins suisses, avec une orientation haut de gamme. Plusieurs réflexions ont tournés la autour.

2.1.7

Il y aurait surement besoin d'aide, comme l'idée à l'époque de faire des bars à vins suisses. Par exemple à Berlin, qui n'est pas une zone vinicole, et je trouve intéressant de s'installer en dehors et en faire une ambassade pour tous les vins suisses et pour les touristes qui y passent. Et si c'est les vins vaudois, c'est encore mieux. Il faudrait faire des partenariats, j'avais convaincu des sommeliers é Bruxelles d'ouvrir un bar à vins suisses et cela est tombé à l'eau. Je trouve qu'il faudrait avoir des partenaires locaux dans les principales villes, comme francfort, Düsseldorf, Berlin et pourquoi pas Munich. Je pense qu'il faudrait aussi faire un effort financier. Il faut faire un effort financier sur les vins suisses, ce n'est pas parce qu'un vin est vendu 25.- ici qu'il faudra absolument le vendre 25.- là bas. Il a toujours cette manière de fonctionner, et cela empêche les vins suisses de s'exporter. Je connais un producteur qui ne veut pas vendre son Yvorne au Japon car il ne peut pas le vendre exactement le même prix qu'ici. Il n'y a aucune stratégie et il en faut une.

Les producteurs suisses pensent encore que les allemands vont vouloir vendre les vins bas de gamme que personne ne veut boire ici. On n'y arrivera jamais, ou alors au détriment de l'image du vin Suisse. Par exemple Marie Thérèse Chappaz ne fait aucun effort pour vendre ses vins é l'étranger alors quand un journaliste new yorkais écrit un article sur elle et qu'il fait 12 oenothèques pour ne pas trouver son vin, ce n'est pas bien non plus. Il faut une présence des vins suisses à l'étranger. Dans certaines villes comme Milan, Berlin, Paris. La Suisse se doit d'être présente.

Pourquoi ne pas faire un partenariat avec un vendeur allemand, pour qu'Uvavins vendent son vin ici et lui le vins suisse là bas. Nous pourrions faire découvrir du bon Riesling ici, puisque de toute façon, Uvavins vend déjà des vins étrangers sur son catalogue en Suisse. Les allemands sont intéressés par le marché Suisse, puisqu'ils viennent à Zürich depuis 3 ans.