

What are the factors limiting La Côte wine producers to export?

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Bachelor of Science HES in International Business Management**

by

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Declaration

This Bachelor Project is submitted as part of the final examination requirements of the Haute école de gestion de Genève, for the Bachelor of Science HES-SO in International Business Management.

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Executive Summary

The purpose of this paper is to understand the factors limiting La Côte wine producers to export in foreign markets where the standard of living is like in Switzerland or where the demand for products of high quality is increasing, especially fine wine. To do so, the Swiss wine conjuncture is presented to capture the essential elements of the domestic market characteristics. In addition to that, two foreign markets where the demand for fine wine is increasing are presented to identify the potential opportunities it could offer to La Côte wine producers.

The core of the paper presents three main internal factors of wineries limiting exporting capacity.

Firstly, a comparative analysis of the marketing-mix of exporting and non-exporting wineries is presented. This section aims at understanding what exporters tend to change in their marketing-mix strategies when exporting.

The second section identifies the winery's internal characteristics that are determinant for exporting activities. The purpose of this section is to capture the key determinants for export and determine which variables are significant to explain exporting capacity.

The third section refers to the management's characteristics. The paper analysis the perception of the external and internal barriers that winemakers have about exports and how it affects their willingness to export. This section is completed with an analysis on the importance of exporting motivation.

The final section suggests that collective actions could allow producers to internalize the costs of pioneer activities and reduce the risks of internationalization. Consequently, the possible actions to support exporting activities are presented and complemented with a case study on an existing export consortium.

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1. Introduction

Switzerland is a country well known for its exports of high quality products such as watches and chemicals. In addition to that, Switzerland is also an exporter of high-end agricultural products such as various varieties of cheese and chocolate. Despite, being a successful exporting country, Swiss wine producers are struggling to export wine. The Swiss wine market is dominated by imports, representing more than 60% of the total supply. Whereas Swiss wine exports only represent around 1% of the total production volume. Certain specialists believe that divers macroenvironmental factors such as the exchange rate, high production costs and low domestic protection are restraining Swiss wine producers to export. However, Gruyere cheese and chocolate face the same constraints but are exported in higher proportion than Swiss wine.

Swiss wine quality has increased over the past years. Only since recently, Swiss wine producers are able to compete in international wine contests against the most recognized wine producing countries. Despite having a recognized quality, Swiss wines are still struggling to export. Moreover, the neighboring markets, such as France, Italy and Spain are saturated. Therefore, Swiss wine producers and more particularly La Côte producers fear strong rivalry in close foreign markets.

For few years the domestic demand is decreasing which does not provide an incentive to produce higher quality wine. Moreover, the relative small size of the Swiss market and low regulations on imports put pressure on local wine producers. These reasons could incentivize producers to search for international demand, through exportation. However, new market penetration often requires changes in the production process and in the marketing-mix. Therefore, new costs and risks are related to market penetration.

Rarely, the sales strategies are similar in domestic and foreign markets. Consequently, the first companies to enter a new market, generally face important costs linked to these new requirements. On the other hand, they create opportunities for other companies that wish to penetrate these markets. Unfortunately, the advantages of exporting pioneer activities are rarely beneficial. Therefore, the costs and risks of exporting pioneer activities can be reduced by the creation of an export consortium.

First of all, the paper focus on a comparative analysis between the marketing strategies of exporting and non-exporting wineries. This section aims at evaluating the importance of marketing-mix adaptation between domestic and foreign markets.

Secondly the characteristics of wineries that limit export are evaluated through the use of linear regression models. Only the variables related to winery's characteristics are evaluated and taken into consideration in this section.

Thirdly, external & internal perceived barriers to export are identified and ranked according to the level of importance in limiting export. This section is completed by the impact of the motivational factors on the export performance of wineries.

Finally, an analysis of Lavaux export consortium was pursued to identify, how collective actions could enhance La Côte wine export performance.

The findings are the results of a survey in La Côte composed of 23 small wineries. The wineries have been interviewed through a questionnaire for the quantitative data and interviews were pursued to complete the analysis with qualitative data. The results show that 30.4% of the wineries interviewed are regular exporters. Furthermore, the results demonstrate that wineries that invest more in the marketing-mix are more successful in export activities. Price and product adaptation are essential elements of the marketing-mix affecting export performance. In addition to that, wineries characteristics such as the size of the winery was a large factor in determining export levels. Other internal characteristics show a strong linkage with the likelihood to export; winery name and the legal structure of the company.

The observations reveal that external barriers to the wineries are perceived as more constraining than the internal barriers. Therefore, wineries consider their environment as more important to their success in export than their own characteristics. On the other hand, wineries that are driven by the development of the winery activities or by the increase in brand recognition tend to be more successful.

Finally, the outcome of the case study demonstrates that collective actions allowed producers to increase their experience and knowledge on foreign markets. Thanks to activities sharing, the main costs and risks can be shared among the participants. Moreover, the discussion revealed that certain Asian markets could allow La Côte wine producers to increase their export performance.

1.1 Specific problematic of research

Like most of the wine producers in Switzerland, La Côte winemakers are selling most of their wine in the domestic market. In addition to that, the exports of Swiss Wine corresponds only to 2% of the total sales volume. This low level of exports may be explained by the lack of low costs advantages and ultimately by the saturation of European markets. However, La Côte wine producers may be able to compete in the premium wine market against existing and well established producing nations such as France, Italy, Spain or more recently Argentina. They may also be able to compete in the emerging markets or in China and Japan where the growth of qualitative differentiated products imported from Switzerland is increasing. In order to fulfill the purpose of this study, the paper will seek to answer the following research questions:

Question for hypothesis 1: Does the marketing-mix strategy of exporting wineries differ with the non-exporting wineries?

Question for hypothesis 2: *What are the wineries internal characteristics that limit La Côte wine producer to export?*

Question for hypothesis 3: *What are the management characteristics that limit La Côte wine producer to export?*

Question for hypothesis 4: *How could collective actions allow La Côte wine producers to increase their exports?*

2. Internationalization of wineries

As it was mentioned in the introduction, Swiss wine exports are extremely low and the competition in the domestic market is high. Today, Swiss wine producers can hardly compete against cheap wine due to the high production costs in Switzerland, therefore the portion of low quality wine purchased in Switzerland is dominated by foreign wine from countries that benefit from economies of scale and cheaper labour costs than Switzerland. On the other hand, Swiss wine producers can compete with foreign wine in the domestic market and increase their production of quality wine. However, the demand may not be sufficient domestically to incentivise more production of high quality wine. Therefore, internationalization can be a solution to increase high quality wine production.

Gaining access to a new and bigger market to achieve growth is certainly the main reason for SMEs to go through the process of internationalization. However, the opportunities can only be achieved if the company has the resources to do so. Firms may also be pushed for internationalization if internal market is saturated, thus firm must adopt a proactive strategy (Cavusgil 1982).

According to Schlegelmilch and Crook (1988), the primary source for exporting is the result of saturated domestic market and the resulting declining sales. However, SMEs with a relative small size tend to have limited experience, information and networks, therefore they are less aware of the opportunities in the domestic and export markets. Consequently, they need assistance from government, as their capabilities of human capital and financial resources are low (Crick D, 1995).

The traditional step to the internationalization is exporting to penetrate a new market. This strategy is considered as the most common internationalization strategy used by SMEs as it requires little experience and foreign market knowledge (Dalli 1995). Despite being a relatively basic internationalization process, companies who export face barriers such as finding commercial partners, transportation costs, cultural barriers and market access restrictions (laws & tariffs) (Masum M. 2008, p. 8).

The costs and risks of these activities are difficult to be fully internalized by pioneer exporting wineries. Pioneer activities refer to the first producer whose intention is to penetrate a new market. The pioneer activities generate learning costs to implement internationalization, costs such as the discovery of the market opportunities or marketing-mix and transportation.

The complexity and risks of exporting activities often restrain small companies to establish a sustainable and successful presence in foreign markets. In addition to that, individual exporting pioneer activities cannot be fully internalized by the company and create opportunities for newcomers. Consequently, certain collective actions to enter a new market can be used to spread the costs of pioneer activities through the members of an export consortium.

An export consortium is a voluntary alliance of firms that have a common objective, promoting the goods or services of its members abroad. In addition to that, joint actions of the members should facilitate new market penetration. Export consortiums often have a medium life expectancy as it should provide support to the members to access the new market until the members become autonomous in their activities. Therefore, members keep their financial, legal and management autonomy, meaning members do not lose their identity. Consequently, an export consortium allows firms to gain knowledge and achieve efficiency gains through collaborative actions and resource sharing (Russo 2005).

The marketing-mix strategies allow producers to keep their identity through a unique selling proposition, (USP). Marketing-mix is the set of controllable, tactical marketing tools than can be mixed to respond to the company target market. The tools can be grouped as the 4Ps:

- Promotion
- Place
- Product
- Price, (the only revenue generator)

The purpose of marketing-mix strategy is creating superior value for the customers. In the beginning of the internationalization process, standardized marketing mix strategy is common, because the same product, advertising and distribution channel are used in foreign and domestic markets. However, adapted marketing mix strategy is suggested, despite bearing more costs (Kotler and Armstrong 2000).

Adapting the marketing-mix is certainly not sufficient to succeed in export activities. According to Monteiro (2013), the firm's internal characteristic for exports can be ranked in three categories, being the management characteristics, the firm's characteristics and the export marketing strategies.

This paper focus on a certain number of these variables, then used to build a model to understand and determine what are the internal firm's factors limiting exports of La Côte wine producers.

Table 1 Factors limiting exporting capacity of a firm

Internal	Management characteristics	Attitudinal	Perceptions about export barriers, about export advantages Export commitment, International orientation
		Skill based	Language proficiency, Education level International experience
	Firm characteristics	Firm Size	N° of employees, Sales volume, Sales employees ratio Investment level in R&D
		Technology level	R&D
		Foreign contacts and networking	Labor and supplier market (domestic networking) Costumer market and capital market (foreign networking)
		Knowledge	
		Age	Number of years in business
		International experience	Number of years in exporting
		Location	Information centers
	Export marketing strategy	Marketing mix	Product, Promotion, Price adaptation and Channel adaptation
		Product capabilities	Uniqueness of the product, Distribution, After sales service
External	Foreign market characteristics	Culture	Cultural similarity
		Governmental regulations	Legal and Political
		Market competitiveness	Economic similarity, channel accessibility
	Domestic market characteristics	Export assistance	Institutions
		Environmental hostility	National export policy, currency

Source: Monteiro (2013)

The success in export is easy to measure in term of financial results. However certain exporters can have other motivations than pure financial profitability. Export performance determinants are classified in two main categories being internal and external factors. According to Monteiro (2013), various proxies can be used to determine export performance of companies. In this paper, the focus is on four proxies as producers do not necessary know precisely how much in quantity and value they export.

Table 2 Proxies for export performance

Proxies	Variables	Description
Export sales ratio	ValueExport	Export as percentage of sales value
Export experience	TimeExport	Number of years the winery has been exporting
Export coverage	ExportCountries	Number of countries the winery is exporting to
Export volume ratio	QuantityExport	Export as percentage of production volume

Source: adapted from Monteiro (2013)

3. Swiss wine markets and trade flows

This chapter provides the context for the thesis research. Section 3.1 defines the domestic market characteristics as the first external determinant for export. The section goes from the Swiss market down to the La Côte market. The second section 3.2, refers to the export assistance for Swiss wine producers, by providing an overview of the role of Swiss wine institutions and Swiss government in enhancing trade outside the EU. The section 3.3 shortly explains the evolution of wine consumption in two Asian countries, where the demand for wine is increasing. Before, the main analysis, this chapter aims at providing sufficient knowledge on Swiss wine market characteristics and its situation in the global market, with a focus on the importance of Asian countries as a new route for Swiss wine exports.

3.1 Domestic market characteristics

3.1.1 Swiss wine conjuncture

Today wine is still the favorite alcoholic beverage of Swiss consumers according to Swiss Wine Promotion. However, consumption is in decline in the population. Despite a slowdown in the total consumption of wine by 2-3%. There has been an increase of

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consumption of wine in a portion of the Swiss population aged above 45 years old with a good education and belonging to the upper class. Moreover, Swiss consumers tend to consume wine of higher quality. (Swiss Wine Promotion and M.I.S Trend (2017).

3.1.2 Swiss wine production & importation

In 2016, the total production surface of vineyards was of 14,780 ha, white grape corresponds to 43% of total surface and 57% for red grape. Vaud region where La Côte belongs, correspond to a quarter of the total of Swiss production surface. The total production of 2016 was of 1,080,000 hl, slightly above the ten years average (Swiss wine 2017).

However, 2017 harvest was lower than 2016 by 28% due to the weather conditions. Consequently, the volume produced was around 800,000 hl.

Switzerland has set import quota for wine. However, the quota limit is rarely met as the Swiss demand is not large enough. In 2016, 91% of import quota was used, corresponding to 1,563,656.8 hl of imported wine. In 2017, wine imports increased by 2% even if 2016 production was higher than the average. Consequently, Switzerland imports 44.8 % more wine than it produces (Administration fédérale des douanes 2017). Consequently, the bad harvest from 2017 will favor imports of wine to meet the domestic demand.

3.1.3 Domestic consumption

In 2016, the consumption of wine in Switzerland amounts 2,523,876 hl, where Swiss wine consumption inside Switzerland corresponds to 424,755 hl of white wine and 465,989 hl of red wine, representing only 35.3% of the total consumption in Switzerland. Representing 33 liters per capita in 2014 and 30.1 liters per capita in 2016. (Swiss Wine Promotion, M.I.S Trend 2017, p °14-40).

The consumption of Vaud wine within Switzerland represents 27.6% of the total Swiss wine consumption (Office Cantonal de la Viticulture et de la Promotion 2014, p ° 42). In addition to that, Swiss Wine Promotion observed that consumers favor local wine consumption and it is especially true in the French-speaking region with 52% of the French-speakers favoring local wine consumption.

These signals could be considered as positive for the La Côte producer, however this not sufficient. Today, Switzerland imports less wine than before but higher quality wine.

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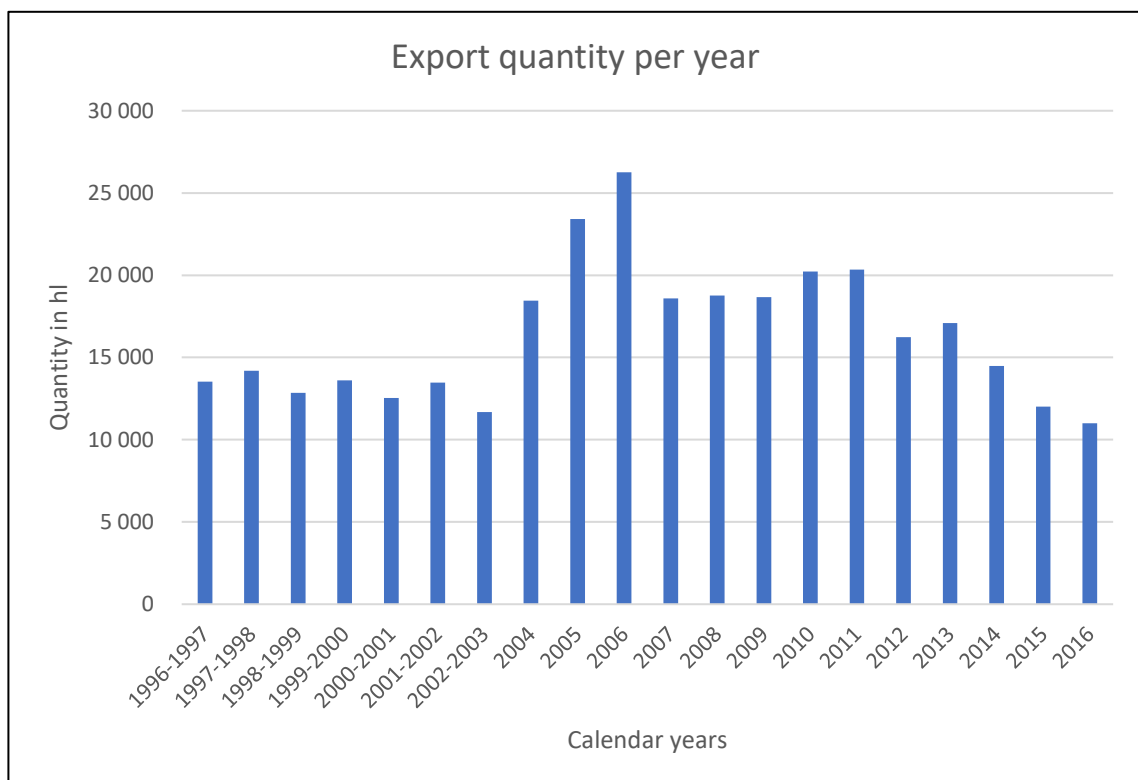
This shift in imports put local producers under pressure as they must increase the quality of their production while remaining competitive in terms of pricing. On top of that the proportion of people perceiving Swiss wine as being too expensive has increased from 36% to 44% between 2013 and 2017.

These signals can be perceived as threats to the domestic market, motivating producers to find a new source of demand abroad.

3.1.4 Swiss wine exports:

The exports of Swiss wine have dropped from 17,084 hl to 10,093 hl between 2013 and 2016. The importations followed a similar trend. It is probably due to the decreasing demand. Within the years the proportion of wine exported varied between 0.5% and 1% of the total production volume. According to the Observatory of Economic Complexity, the value of the export of Swiss wine are increasing despite a slowdown in exporting quantity. Therefore, it means that consumers of Swiss wine abroad are willing to pay more for Swiss wine and perceive Swiss wine as a higher quality product than what it used to be.

Figure 1 Swiss wine exports



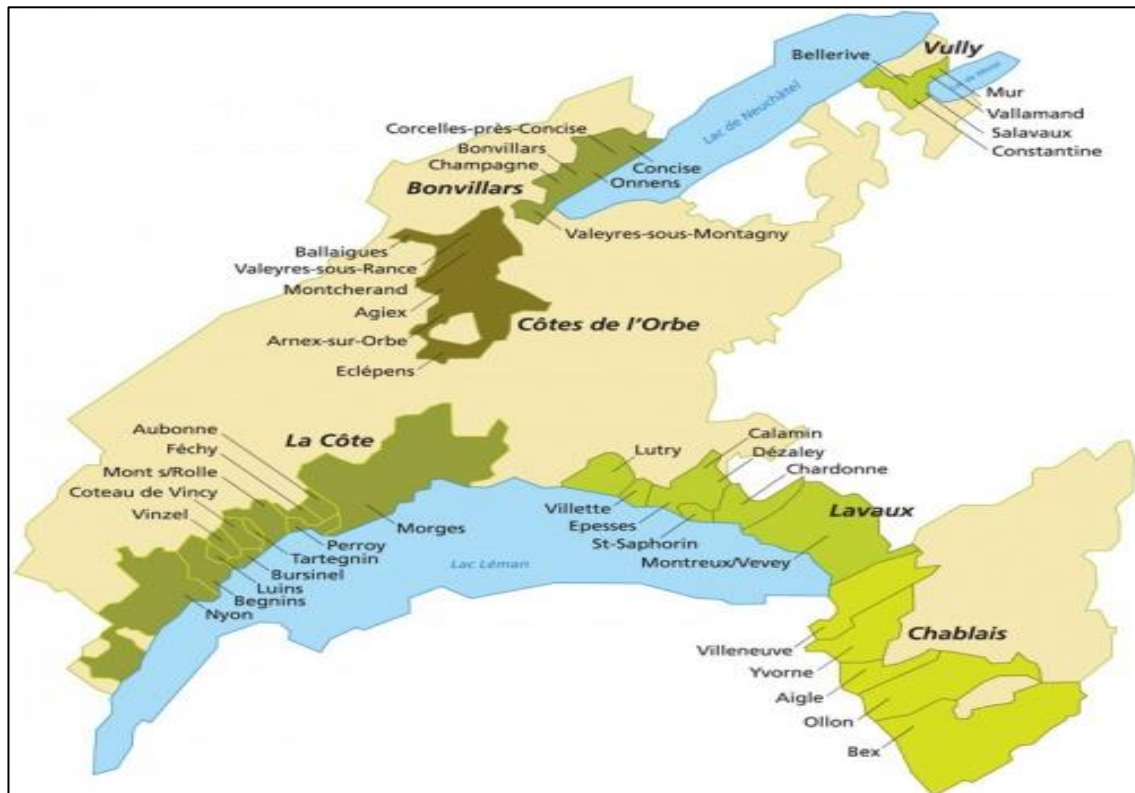
Source: Office Fédérale de l'Agriculture (2017)

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3.1.5 The Vaud region and its wine market conjuncture

Figure 2 Vaud wine regions



Source: DIVIOVINO. Diviovino.eklablog.com [online] [Viewed 29 May 2018] Available from: <http://diviovino.eklablog.com/carte-suisse-la-cote-vaud-p492913#top>

A major difference between Switzerland and Vaud is the proportion of white wine produced which is higher, 65.02% in 2017 and **Chasselas**¹ a typical white grape from Switzerland accounts for 59.68% of the total Vaud production. The proportion of Chasselas in La Côte is similar, with 61.25% of the total production. Pinot noir, Gamay and Gamaret are the most produced red grapes of La Côte, respectively 10.02%, 9.59% and 4.37% of the total production. Thus, the white wine production equals **67.59% and 31.75% of red wine**. In both regions the production rate² is larger than 99.3%, which is in the high range for Switzerland.

¹ <http://www.chasselas.ch>

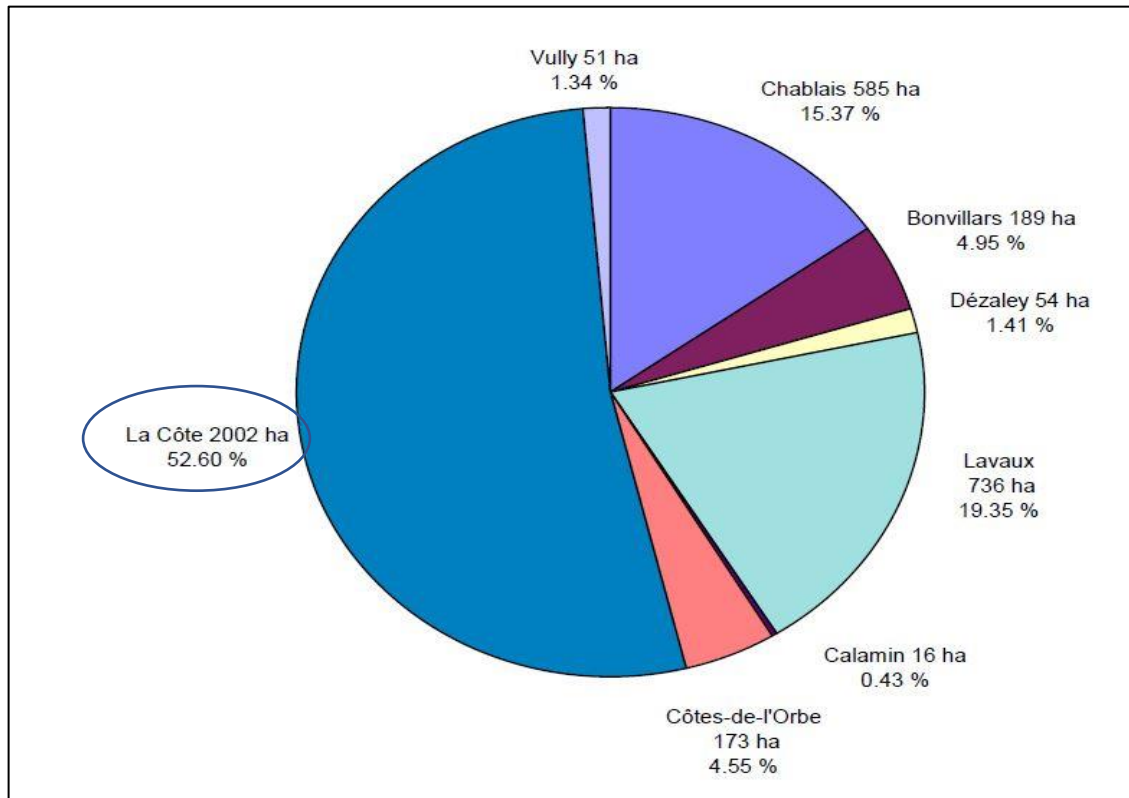
² The production rate is the allowed quantity of grapes per m² according to its production restrictions. The restrictions are set by the Législation Vaudoise on wine production.

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According to the “Règlement sur les vins Vaudois”, chapter 2, art 3, the Vaud canton is divided in height regions, including La Côte (Législation Vaudoise 2009). The Figure 3 shows the surface of production per regions.

Figure 3 Surface of production per regions



Source: Législation Vaudoise (2009)

3.1.5.1 Export of wine from Vaud

According to Mister Benjamin Gehrig³, The director of the Office des Vins Vaudois most of the exported wine from Vaud is white wine. Unfortunately, the exact the number of bottles exported is not known, as today this data is not collected at a regional level. The estimated number of bottles exported is around 40,000 bottles per year, which corresponds to around 30,000L. However, most of the exported wine are AOC⁴ and

³ Interview with the Director of Office des Vins Vaudois, May 2018

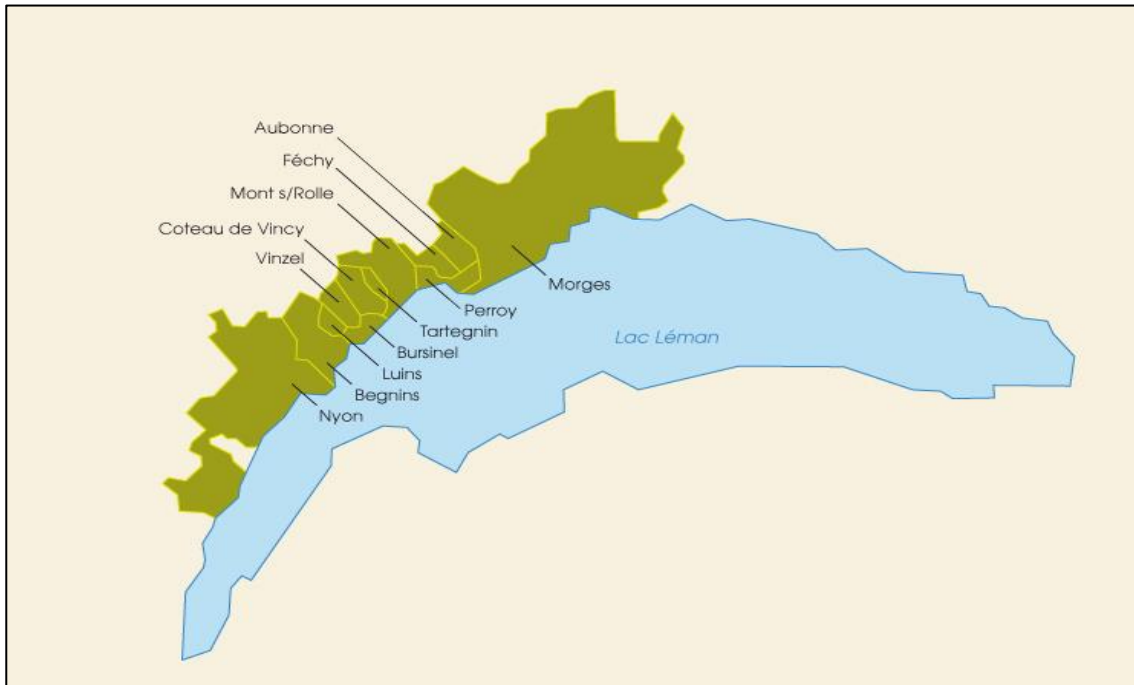
⁴ Législation Vaudoise (2009)

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Grand Cru⁵, simply because Vaud wine producers focus on niche markets and especially on the premium segment.

Figure 4 La Côte



Source: LA CÔTE AOC. Les-vins-de-La-Côte.ch. [Viewed 29 May 2018]. Available from : <http://www.vins-de-la-cote.ch/>

3.1.6 La Côte region and its specificities

La Côte is the largest wine producing region of Vaud State with 52.60% of the production surface. La Côte counts twelve different places of production, defined in the Art. 9, Chapter 2 of the “Règlement sur les vins Vaudois” (Législation Vaudoise 2009).

⁵ Législation Vaudoise (2009)

Figure 3 Places of production, La Côte

Région	Lieu de production	Surface (m²)	Pourcent
La Côte	Morges	6'038'360	30.17 %
	Nyon	2'676'541	13.37 %
	Mont-sur-Rolle	2'552'379	12.75 %
	Féchy	1'772'488	8.86 %
	Tartegnin	1'390'941	6.95 %
	Luins	1'114'202	5.57 %
	Perroy	1'113'798	5.56 %
	Begnins	937'567	4.68 %
	Aubonne	782'990	3.91 %
	Coteau de Vincy	618'402	3.09 %
	Vinzel	522'246	2.61 %
	Bursinel	495'525	2.48 %

Source: Législation Vaudoise (2009)

In addition to that, La Côte is also the region with the largest vineyards with an average of 4,880 m² whereas in Vaud the average is at 2,826 m². Therefore, wineries can benefit more from economies of scale per parcel of production (vineyards).

The La Côte region is an AOC region which ensure a certain standard of quality and geographical security according to production specifications set by the Office des Vins Vaudois. The Vaud regions enjoys mineral soils, where the glacial moraines are relatively young (less than 10,000 years), which provide the roots mineral nutrients to feed the vineyards perfectly. In addition to that, the composition of the soil allows rain to be drained smoothly to the roots of the plant (Murisier F. Brigue C. Letissier I. Pythoud K. 2004).

Fortunately, La Côte is protected from the cold northern wind but is often exposed to a wind called “la bise” this dry wind is mostly followed by sunny days. This wind is favorable to protect the vineyards from cryptogamic diseases, which are mostly due to a high degree of humidity. The yearly temperature average in La Côte is around 10.6°C, with an average at 20.3°C during summer. These stable temperatures with few extremes variation of temperatures during the floral period is particularly advantageous to enhance the fertilization of the vineyards (Office Fédéral De Météorologie Et De Climatologie 2013).

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3.2 Export assistance for Swiss wine producers

Swiss wine promotion (SWP) is the highest institution for Swiss wine. Within (SWP), the export department is in charge of supporting Swiss wine producers for exporting wine. Their role is to educate the producers and enhance the Swiss wine image abroad. Moreover, Swiss Wine Promotion has settled diverse activities to push producers to develop exportation. Their activities include taking part in international events or national events to raise awareness of the Swiss wine quality in the domestic and foreign markets. SWP has published its objectives for exports and set the expected exported volume to be around 5% of the total production in the upcoming years. In order to achieve its goal, SWP is working with its peers in Switzerland, in which there are six regional institutions in charge of the promotion of their region. In Vaud (OVV) Office des Vins Vaudois is in charge of the promotion and export development.

Swiss Wine Promotion does more global projects for producers with support for the financing of the export and creating the first link with the foreign market. Therefore, their role is limited easing the initial relation with the foreign market (Swiss Wine 2015).

On the other hand, OVV has a different approach. The main objective of OVV is to promote wine from Vaud within the domestic market which represents around 60% of its activities. However, for the development of export, OVV has decided to work with partners such as Hublot, the watch manufacturing company. This partnership provides financial support to OVV whose main role is to sponsor events abroad. This allow OVV to build a network of wine professionals beforehand and organize trips and activities without asking for financial participation from the wine producers directly. Consequently, the producers who are chosen for the export project do not need to finance and organize the trip. According to Benjamin Gehrig⁶, the director of OVV, this an important advantage as producers arrive in the foreign market and their only concern is to develop their network with the present professionals (RCV 2014).

Swiss wine producers do not only benefit from the promotional institutions of their regions but also from the government. The federal government act on export promotion and has the following objectives:

- Identify and exploit market opportunities abroad

⁶ Interview with the Director of Office des Vins Vaudois, May 2018

- Position Swiss exporters as internationally competitive abroad
- Support access of Swiss companies to foreign market

In addition to that, Switzerland has a program for investment companies as Swiss SMEs are increasing their investment abroad. Within the framework of OECD,⁷ Switzerland can enhance the legal position of investors to create a favorable climate for international trade (L'Assemblée fédérale de la Confédération suisse 2000).

Consequently, Switzerland is deeply involved in developing support functions to allow Swiss companies to develop their activities abroad.

3.3 The saturation of the European market

The choice of new market penetration is influenced by the firms' financial capacity and its knowledge of the foreign market. Therefore, the first export activities are mainly in surrounding markets. Unfortunately, Swiss wines fear strong rivalry in European markets with well-established producing nations. The latest data on the European wine market shows that EU wine consumption is mainly from Europeans producing countries, thus EU wine imports is only 10% of the consumed wine. European producing countries mostly consume their own production (60%). The import level should drop drastically as UK was importing 50% of the total EU imports, making the EU saturated for Swiss wine exports. On the other hand, the EU is the largest exporter of wine and Switzerland represents 6.8% (1,711,993 hl) in 2017 of the total EU exports. European Commission (2015), 1–3 Moreover, the price / volume ratio increased since 2014, therefore European wine export quality is increasing in term of price. On the other hand, the price / volume ratio of exported wine to China is decreasing and the value of the exported wine is more than 50% lower than the total export average value.

⁷ Organisation for Economic Cooperation and Development

However, the export value to Japan is increasing and the price ratio is above the total export average value, thus the Japanese market is a more premium market than China for European wines.

Table 3 European wine exports

CN2204 Wine Trade results EU-28 EXPORTS EXTRA EU												
EXPORT	CN2004 in HL	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
in Volume	Extra-EU28	17 917 535	17 324 366	16 139 411	20 211 349	22 671 128	22 476 198	20 459 366	21 305 884	21 967 191	22 371 996	24 906 110
HL	Canada	1 505 539	1 510 931	1 471 788	1 670 343	1 823 720	1 888 404	1 746 439	1 712 013	1 767 919	1 760 962	1 966 738
	Switzerland	1 624 787	1 574 913	1 681 887	1 729 450	1 714 859	1 720 451	1 589 416	1 676 521	1 708 427	1 678 024	1 711 933
	Japan	1 082 007	1 132 493	1 145 265	1 215 553	1 314 862	1 632 463	1 551 128	1 499 113	1 493 610	1 388 833	1 428 539
	Russian Federation	3 750 121	3 120 538	2 664 240	3 065 863	3 979 991	2 786 857	2 364 586	2 793 294	2 404 027	2 523 063	2 661 447
	China	372 615	517 386	720 194	1 600 279	2 371 161	2 575 616	1 974 361	2 205 017	2 849 096	3 249 830	4 214 053
	Hong Kong	105 726	118 107	156 675	237 293	304 744	289 696	261 807	272 762	269 136	263 595	281 466
	China + HK	478 341	635 493	876 870	1 837 572	2 675 905	2 865 312	2 236 167	2 477 779	3 118 232	3 513 425	4 495 518
	United States	4 698 349	4 507 738	4 128 431	4 606 376	5 234 450	5 430 616	5 302 204	5 281 048	5 624 245	5 918 314	6 299 647
	7 main	13 139 144	12 482 105	11 968 482	14 925 157	16 743 787	16 324 103	14 789 941	15 439 769	16 116 460	16 782 620	18 563 822
	Other Dest	4 778 391	4 842 261	4 170 929	5 286 192	5 927 340	6 152 095	5 669 425	5 864 187	5 849 958	5 588 288	6 342 289
in Value	CN2004 in MIO €	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Mio Eur	Canada	564	583	522	631	689	769	769	717	778	796	871
	Switzerland	654	741	669	720	769	873	894	868	893	897	968
	Japan	566	597	493	548	611	771	776	735	756	747	799
	Russian Federation	332	364	259	380	462	496	549	515	368	401	535
	China	111	143	201	389	694	766	660	647	819	921	1 154
	Hong Kong	117	197	306	558	785	601	577	554	671	723	763
	China + HK	228	340	506	947	1 479	1 367	1 237	1 200	1 490	1 644	1 917
	United States	2 260	2 094	1 734	1 961	2 245	2 488	2 570	2 664	3 156	3 306	3 588
	7 main	4 604	4 718	4 184	5 188	6 254	6 763	6 796	6 698	7 441	7 792	8 679
	Other Dest	1 351	1 450	1 180	1 518	1 854	2 102	2 192	2 306	2 360	2 315	2 618
	EU - 28	5 955	6 169	5 364	6 706	8 108	8 865	8 988	9 004	9 802	10 107	11 297

Source: (European Commission 2015)

3.4 Asian markets, a new route for Swiss wine

In order to overcome the obstacle of the saturated European market, Swiss wine producers can rely on Free Trade Agreements to ease trade activities outside the EU. As Switzerland's domestic market is small, its relationship with external markets is essential to maintain international trade prosperity. Consequently, new Free Trade Agreements (FTA) with partners outside the European Union were concluded. This aims at facilitating access to fast growing economies. Therefore, since 2006, Switzerland has reinforced its commercial relationship with Asian countries. Nowadays, Switzerland has three FTAs with Asian countries, the first one with South Korea, second one with Japan since 2009 and more recently China since 2013.

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The privileged access to these markets should incentivize La Côte wine producers to focus on these fast-growing markets. However, as revealed in EconomieSuisse (2016, p ° 2) *“China's systematic routine inspection of direct transport creates an unnecessary administrative burden for businesses”*. Consequently, producers may fear exports despite having privileged access to these markets. Fortunately, the review mechanism clause provides periodic reviews, which is beneficial for the business activities (Swiss Confederation, Republic of China, p 9).

In 2017, Switzerland reached a new record exports to China and Hong Kong. The exported value of the goods increased by more than 16.9%. Today, China has become the third largest market for Swiss goods.

Japan is another key partner for Switzerland in Asia with a strong relationship since the FTA that entered in force in 2009. In addition to that, Switzerland is the eighth largest investor in Japan. Swiss exports to Japan are mainly composed of high end products such as watches, jewellery and chemicals. The total export to Japan corresponds to 7 billion CHF or 3.2% of total Swiss export in 2011 (Secretariat for Economic Affairs 2016).

3.4.1 Asian wine consumption evolution

Today China is the largest wine consumer in Asia. Its wine consumption is growing in tandem with ageing millennials. However, the Chinese wine consumers are mostly not knowledgeable on wine. This is explained by the culture and consuming habits. Wine was mostly consumed by the educated, wealthy class of Chinese society. However, recently consuming habits are shifting, and wine consumption is increasing. Interestingly, China wine import value is increasing mainly because of premium wine imports. The annual compound growth rate is expected to be 6 per cent over the next ten years, making China a very attractive country for wine producers. Despite being the largest Asian producing country, China fails to compete with old wine producing countries and is threatened by the new world wines. Moreover, premium wine producers have room to export to China before the domestic producers will be able to produce comparable wine (Wang 2017. p ° 6).

On the other hand, the wine consumption boom in Japan took place in the late 1990's making Japan consumers more knowledgeable about wine. In 2012 Japan was the 15th largest wine consuming country. In Japan, the main determinant of consumption is the

price, therefore Japanese average buying price for a bottle of wine was between 500 JPY and 1000 JPY in 2014, (4.5 CHF to 9 CHF) (Dobronoteanu 2014. p ° 6-8).

3.4.2 Foreign governmental regulations limiting Swiss wine exports

Even though these two Asian markets seem attractive for Swiss wine exports, the picture is not all bright however. Swiss companies that expect to enter the Chinese market must remain aware that the Swiss-Sino FTA does not reduce all the entry barriers. Some internal regulations such as consumer taxes on luxury goods, the need to have a business license for any activity in China and other sanitary regulations can restrain Swiss SMEs with limited resources to enter the Chinese market (Brunschweiler and Troller 2014).

On the other hand, Japan like Switzerland is an open economy thus the bilateral agreement has a limited impact on trade activities. The success rate, which measures the degree to which the FTA effectively eliminates remaining tariff payment is of 62.2% for Swiss exports to Japan. Consequently, SMEs seek almost no tariffs barrier to enter the Japanese market (Ziltner 2016). There is evidence that Asian markets will become more and more attractive for Swiss wine. Nevertheless, Swiss wine producers must keep in mind that new market penetration is even more complex in Asian due to the export logistic complexity. The importance of selecting the right market and the right price segment will be vital for export performance.

4. Methodology

To study the problematic put forward by this research paper, four main hypotheses are presented based on the four questions from the introduction, section 1.1. The theoretical hypotheses were built on the model of Monteiro (2013) that suggests that the main internal factors for export are in the export marketing strategy, management characteristics and the internal firm characteristics. Consequently, for this study the paper conducts a comparative study of two groups, exporting wineries and non-exporting wineries. Furthermore, the study is supplemented with a multi variable regression model to predict the determinant internal winery characteristics for export.

4.1 Theoretical questions and hypothesis

Question 1: *“Does the marketing-mix strategy of exporting wineries differ with the non-exporting wineries?”*

The following hypotheses aims at confirming whether exporting wineries marketing-mix strategies differ from non-exporting wineries. To do so, the four elements of the marketing-mix are evaluated through a comparative analysis of quantitative data.

- *Promotion and place adaptability*
 - *Promotion and distribution differ between domestic and foreign market.*
- *Product & adaptation*
 - *Product characteristics differ between domestic and foreign market.*
- *Price adaptation*
 - *Prices differ between domestic and foreign market.*

Question 2: *“What are the characteristics of wineries that limit La Côte wine producer to export?”*

- ***The larger the firm is, the more inclined to export it is.***

Smaller firms tend to export a smaller share of their sales due to limited resources, lower ability to benefit from economies of scale, and higher perception of risks involved in international activity (Bonnaccorsi 1992). Economies of scale can lower the average production costs, which can explain the ability of larger firm to increment international activities such as exports. In addition to that, larger firms can cover sunk costs which are necessary when penetrating a new market, thanks to sufficient profits (Jongwanich, Kohpaiboon 2008). Based on these

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elements, the paper defines firm size as being its volume of production and its total surface of production in hectares.

- ***The older the firm is, the more inclined to export it is.***

According to (Roberts and Tybout), the firm age is a determining factor for the likelihood of good export performance. Therefore, it is more likely to have higher export activities from older firms rather than young firms. In addition to that, another empirical study has proven that firms are able to accumulate knowledge through the years, thus the older the firm is the more efficient and better performer it is in export activity (Jongwanich and Kohpaiboon 2008).

- ***The legal structure of a firm can explain its capacity to export.***

The firm legal structure can allow a risks reduction for the business owner, making the management more inclined to take risks. The risks could be developing the company overseas through exports. Thus, firms with a stronger legal structure such as limited company should be more willing to export.

- ***The product quality has a positive effect on exporting activities.***

Linder (1961) was the first author presenting the importance of quality in trade and its role in the direction of trade flows. According to him, richer countries spend a larger proportion of their disposable income on high quality products, therefore countries trading goods of high quality tend to trade between each other. More recently Hallak (2004) supported the concept of Linder and enhanced the relationship of trade between rich countries in that they tend to import relatively more from countries that produce high quality goods.

Consequently, La Côte producers could export wine where there is demand for such qualitative products, such as Japan or China for a certain portion of the population.

- ***The firm brand name positively influences export performance***

According to Lockshin, Rasmussen and Cleary (2000) wine brand includes many variables such as country of origin, region, appellation, denomination of the winery and labels. The study suggests that the winery denomination and label could create awareness and favor strong and favorable brand associations, which can be a determinant for regular exports over the years.

Question 3: *“What are the management characteristics that limit La Côte wine producers to export?”*

- ***The more the producers perceive the barriers as important, the less inclined to export it is.***

Export performance is often attributed to the firm and management control, therefore good export performance can be attributed to the management. Management characteristics such as commitment to export and perceived export barriers are determinants that affect the export performance of a firm. In addition to that, skills and export experience and educational level are large factors in overall export performance, (Monteiro 2013). However, in this paper management characteristics are identified according to the most important perceived barriers to export. This analysis is based on a mean comparison between internal and external barriers in two groups, exporting wineries and non-exporting wineries.

Question 4: *“How could collective actions allow La Côte wine producers to increase their exports?”*

- ***Collective actions allow producers to enhance their export performance.***

Based on the questionnaire, collective actions and more precisely, the creation of an export consortium is perceived as the best solution to enhance the export of wine from La Côte. Therefore, a case study from an existing export consortium is presented with its advantages and drawbacks.

- ***Collective actions allow barriers perception reduction.***

Through the analysis of the case study of the Lavaux export consortium, the paper evaluates whether producers perceive the barriers to export as less important than individual exporters.

4.2 Research conceptual framework

This section aims at presenting the dependent and independent variables to answer the four research questions.

4.2.1 Dependant variables

Variables such as export quantity and export value are not used because they do not differ between exporting wineries. Therefore, the dependant variable which corresponds to whether a winery is exporting or not is called the “ConsistentExport”. The dependant variable used (“ConsistentExport”) varies between no exportation, coded 0 and regular exportation, coded 1.

Two other variables are used to identify the performance of the export in term of quantity and value of the exports, thus” QuantityExport” & “ValueExport”.

Table 4 Measurment of export performance

QuantityExport	1 = 1%-5% 2 = 5%-15% 3 = 15%-30% 4 = 30%-50% 5= >50%	Percentage of the total volume of production per year
ValueExport	1 = 1%-5% 2 = 5%-15% 3 = 15%-30% 4 = 30%-50% 5= >50%	Percentage of the total sales value per year

4.2.2 Independent variables

Due to the large number of independent variables, only the code of the variables is presented in the following tables. In order to get the variable name, please refer to the Appendix 1.

Table 5 Variables, management characteristics

Management characteristics	Variables	Used to identify perception on
Attitudinal	V46/V50/V51/V52	Internal export barriers
	V47/V48/V49/V53-V61	External export barriers
	V41-V45	Motivations for export

Source: adapted from Monteiro (2013)

Table 6 Variables, marketing-mix

Export marketing variable	Variables	Used to identify
Marketing mix	V31-37	Promotion adaptability
	V29/V30/V72-77	Distribution channel
	V99-114	Product adaptation
	V79/V80	Price adaptation

Source: adapted from Monteiro (2013)

Table 7 Variables, winery characteristics

Firm characteristics	Variables	Used to identify
Firm size	YearProduction	Size according to the production volume
	Totalha	Size according to the total productive surface of the vineyards
Age	YearCreation	Age according to the year of creation

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Brand name	Denomination	Brand name according to the winery name 'specificities
Product quality	WhiteQuality / RedQuality	Quality according to the denomination produced
Legal structure	Company	Legal structure according to the commercial register

Source: adapted from Monteiro (2013)

Table 8 External factors

Domestic market characteristics	Secondary data	Used to
Market, governance regulations	Swiss wine market	Understand markets supply and demand.
	Vaud & La Côte wine market	Understand characteristics of these regions and market structure.
	Export assistance	Role of institutions and politics
	Governance and regulations	Understand legal and Political environment.

Source: adapted from Monteiro (2013)

Foreign market characteristics	Secondary data	Used to
Market, governance regulations	Surroundings market	understand surrounding market structure for wine.
	Culture	understand wine consumption habits in Asia.

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	Governance and regulations	understand legal and political environment of Asian countries towards Switzerland. (FTAs).
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Source: adapted from Monteiro (2013)

4.3 Data collecting strategy

The data gathering was pursued by the use of a survey, composed of two sections. The first section addresses general questions on the winery's characteristics in order to identify the determinant factors for export performance. The second section focuses on the exporting wineries and winery export characteristics and also the management characteristics. The questionnaire is eleven pages long, including the research objectives, the participation agreement and the confidential agreement. The questionnaire is available in Appendix 3.

The study was conducted in the La Côte region. More specifically, wine producers from twelve different places of production. To complete the first sample of producers, a random selection of three producers in each place of production took place, thus 36 samples out of 162 registered in "les vins de la Côte"⁸ would have been reached which represents 22.2% of the population.

Despite, consequent effort put in place to gather maximum samples during the period of January to March 2018, adjustments in the data collection method were made, thus 23 questionnaires out of the 95 sent were collected, representing 14.2% of the population with a response rate of 24.2%.

To supplement the quantitative analysis three interviews were conducted. Two interviews were conducted with two producers on a face to face basis. The purpose of the interviews was to gather information about the key factors allowing a single producer to export wine on its own.

The third interview was conducted with the Director of Office des Vins Vaudois (OVV) in order to identify what are the collective actions proposed in La Côte and in Vaud to allow single producers to export and what is the strategy put in place by OVV to do so.

⁸ <http://www.vins-de-la-cote.ch/producteurs>

Moreover, the interview is complemented by a small case study analysis on an export consortium created by Lavaux producers.

4.4 Sample characteristics

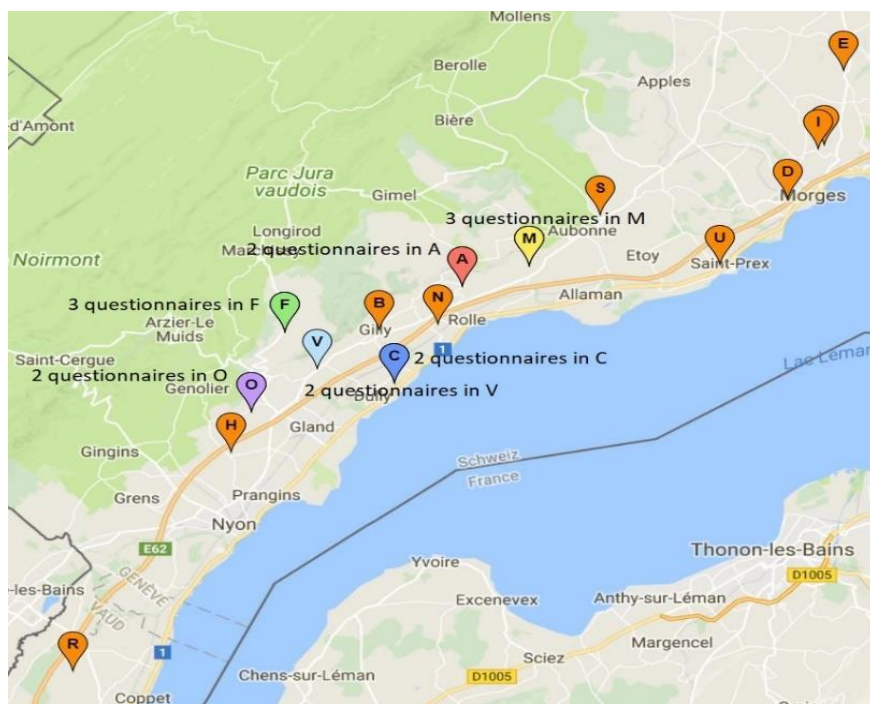
The sample is composed of producers from every production location of La Côte. Despite having an heterogeneous sample, its size is small, making statistical analysis not perfectly reliable. The sample is only composed of wineries producing their own wine, thus cooperatives are excluded from the sample.

Table 9 Disposition of contacted wineries

	Number of wineries
Contacted wineries	95
Observed wineries	23
Declined the questionnaire	43
Did not respond	29

The figure below is the map representing the distribution of the observed wineries in La Côte. The variable “Zipcode” was used to generate the distribution map. The region of Nyon representing 13.37% of the surface of production in La Côte but is only represented by two producers. The proportion of observation in the other regions is more representative of the population. Due to confidential agreements no names of wineries appear in the paper, neither the exact location. Therefore, they are identified through a number, variable “id”.

Figure 4 Geographic distribution of observed wineries



Source: adapted from <https://www.mapcustomizer.com/>

The map shows where the questionnaires have been distributed. There is some place of production more represented than others. The reason being that certain wineries were more difficult to access and often wineries in smaller locations are more difficult to interview.

4.4.1 Summary of the main variables

The variable “Totalha” represents the size of winery in Ha. 1 = <5 ha, 2 = 5 ha to 10 ha, 3 = 10 ha to 15 ha, 4 = 15 ha to 20 ha, 5 = >20 ha. The summary table shows that most of the observed wineries have a surface of production between 5ha to 10ha. The mean observed for the surface of production, “Totalha” is 2.74 which corresponds to 10.96ha. The second variable, “YearProduction” refers to the annual volume of production per winery. The values go from 1 to 5. The mean for “YearProduction” is equal to 3, which corresponds to average volume of production between 50,000L to 100,000L. Based on the report of the total production volume per year in Vaud divided per the total surface of production, the average volume of production in litter per hectars is approximately 6750 L, therefore the mean of the annual production volume is around 70,000L and up to 80,000L.

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The variable “ConsistentExport” refers to whether the winery is a regular exporter 1 = Yes and or not 0 = No. The absolute values are the frequency and the values below correspond to the relative proportion in percent. The first observation shows that 30.34% of the wineries observed are regular exporters. The observed wineries do not export more than 5% of their total volume of production nor more than 5% of their sales value. However, one producer exports more than 5% of the total volume but not more than 5% in term of sales value. The outcome of the proportion of volume exported in the sample is similar to the Swiss wine export volume. Taking the 30.34% of exporters who export 5% of their production volume, makes an export volume of 1.52% for the observed wineries.

The experience in export is represented with the variable “TimeExport”, (0= no export, 1 = 1-5 years, 2 = 5-10 years and 3 > 10 years). The summary table shows that the mean value for the experience is between 5 to 10 years, with a mode for more than 10 years of exporting experience.

Table 10 Summary of the main variables

Variables	value	Mean	Frequence	Nb observations	Min value	Max value
Totalha		2.73		23	1	5
YearProduction		3		23	1	5
ConsistentExport	0		69.6%	16		
	1		30.4%	7	0	1
ValueExport		1				
	0		69.6%	16	0	5
	1		30.4%	7	0	5
QuantityExport		1.14				
	0		69.6%	16	0	5
	1		26.1%	6	0	5
	2		4.3%	1	0	5
TimeExport		2.14				
	0		69.6%	16	0	3
	1		8.7%	2	0	3
	2		8.7%	2	0	3
	3		13.0%	3	0	3

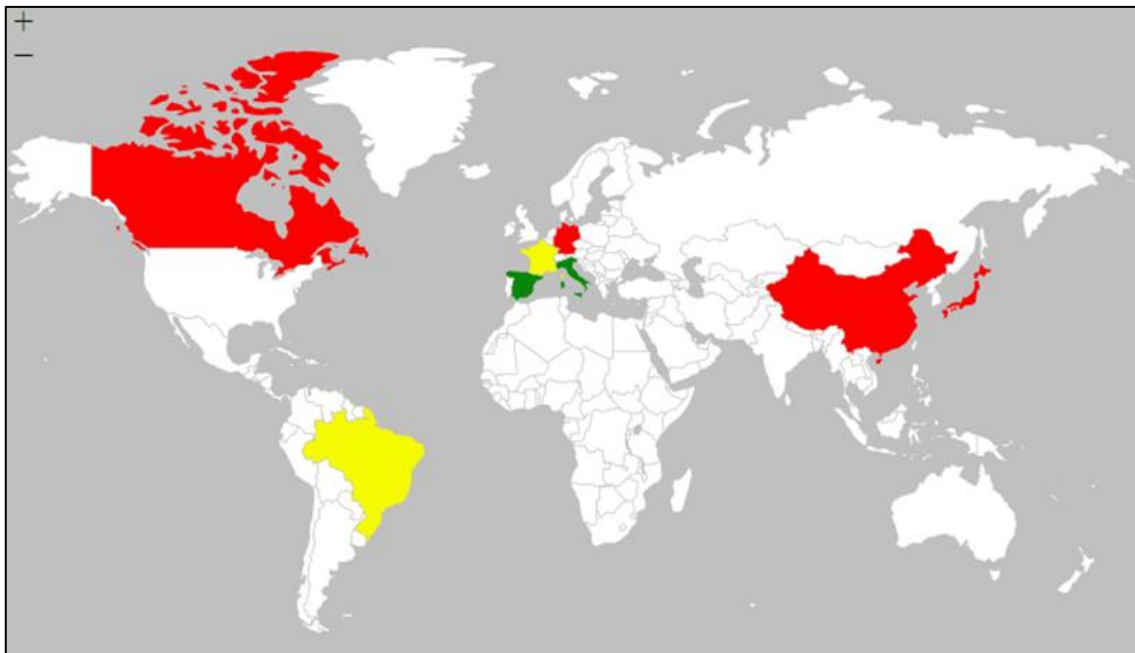
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4.4.1.1 Where do La Côte producers export?

The map below represents the countries where the observed wineries are exporting. Even with only seven exporters, there is evidence that the European market is not the leading region for export of Swiss wine. However, Germany is the largest importer in term of volume. The efforts put in place by OVV to favor export in Asian markets, mostly Japan and China, are worthwhile as four out of seven observed exporters entered these markets.

Figure 5 Countries of exported wine from observed wineries



Country colour	Nb of exports
Red	3
Yellow	2
Green	1

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5. Results

The results of the paper are based on comparative analyses. The analyses are based on the four research questions laid out in section 1. The first comparative analysis has for objective to understand the difference between exporting and non-exporting wineries in their marketing-mix strategies.

The second analysis is built on a five factors analysis to understand in what the internal wineries' characteristics are limiting export capacity.

A third analysis on export capacity is conducted to understand how producers perceive the barriers and how that limits their export capacity?

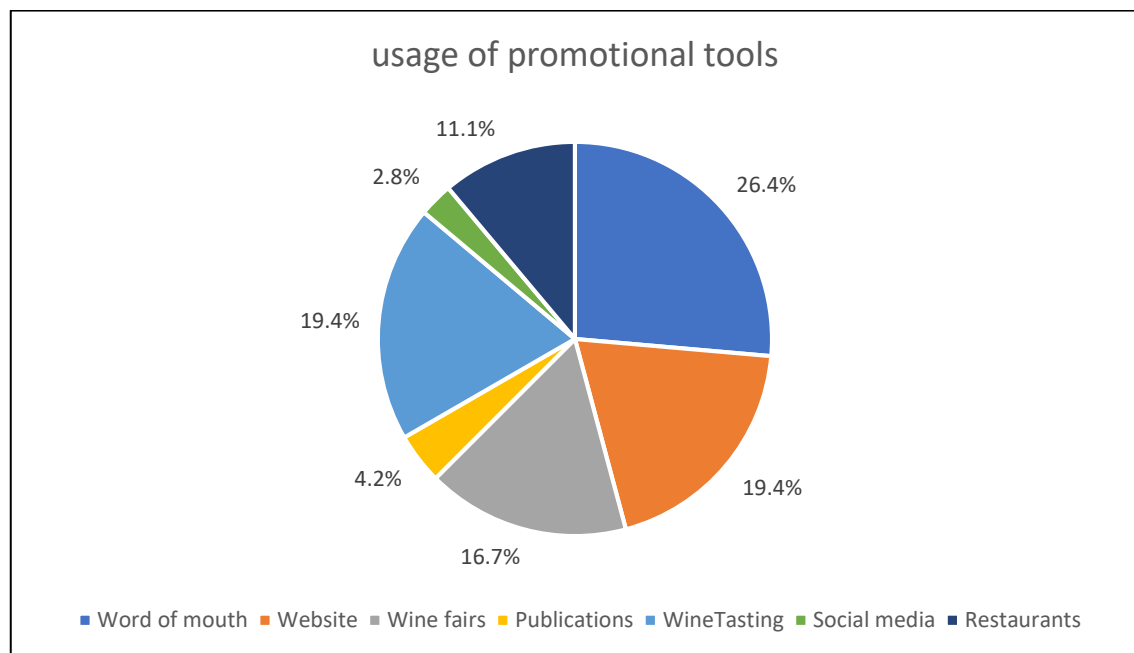
As a conclusion a case study on an export consortium was pursued to identify the major benefits brought by collective actions to penetrate a new market.

5.1 Descriptive Statistics, marketing-mix strategy

5.1.1 Promotion and place (distribution) adaptability

The marketing-mix strategies of the observed wineries tend to differ between exporting and non-exporting wineries. The results of the survey demonstrate that producers in La Côte favor low cost promotional tools, such as word of mouth, wine tasting events, their website and social media to increase their brand recognition in the domestic market. It has been documented by Huang and Brown (1999) that small companies growth potential is limited by their size and resources.

Table 11 Promotional tools



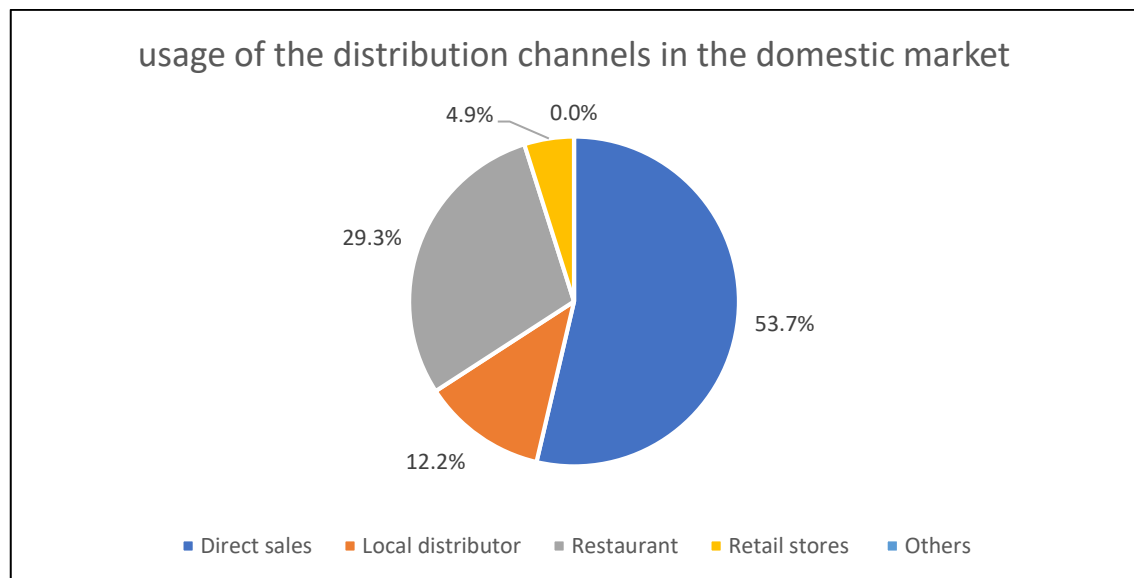
Similar results were observed for the distribution channels. More than half of the producers use direct sales channel to distribute their product. There is evidence that direct distribution channels can help small producers build financially viable activities and therefore, reduce their marketing risks. However, to do so producers must manage their marketing costs as well as production costs (Hardesty and Leff 2009). Direct distribution channels include “direct sales and restaurants”. Therefore 83% of the observed wineries’ sales are made through direct distribution channels.

According to SWP 2017 report, 40% of Swiss consumers purchased their wine in retail stores, whereas only 25% purchased wine directly from the producer. In La Côte the survey shows that direct sales represent 53.7% of total sales.

The distribution strategy is essential under a resource-based view of the business, in order to generate value for the customers. It considers that the business itself and its product specifics are not sufficient resources to allow sustainable competitive advantage (Sonsino 2000). Consequently, direct distribution channels allow producers to enhance their customer relationship and create long term and profitable experience. This is confirmed by Swiss Wine Promotion statistics that 45% of regular wine consumers always purchase wine from the same producers (Swiss Wine Promotion and M.I.S Trend 2017).

Large retail stores are rarely used by La Côte producers. They represent less than 5%. One reason comes from the production volume of wineries in La Côte. Most of the producers are small thus they are not able to guarantee a constant supply to retail stores. In addition to that, the Swiss wine market is dominated by foreign wines relatively cheaper, benefiting from lower production costs and larger production capacity. This gives then more negotiating power with retail stores. One respondent argued that the price pressure from large retail stores prohibits a decent margin.

Table 12 Distribution channels in the domestic market



On the other hand, 90 % of the observed wineries would favor indirect channel as export distribution channels. Indirect export distribution strategy allows the producer to reduce certain risks and costs when penetrating a new market. However, this strategy constrains significantly the control producers have over their products. Despite this, producers tend to favor foreign distributors for indirect distribution channels. They know the market and are generally specialized in one type of goods and have well established networks

Table 13 Export distribution channels

Export distribution channel	
Indirect	90%
Direct	10%

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Table 14 Indirect distribution channels

Contracted sale's agent	27.3%
Domestic distributor	27.3%
Foreign distributor	45.5%

According to one respondent the main reason to select indirect distribution is time. For a small producer it is extremely difficult to take time to develop an export strategy. In addition to that, their knowledge of target foreign market is often limited; moreover, exports mostly occur as a response to a demand (pull strategy) rather than push strategy. Consequently, exports often rely on the personal network of the producers. The foreign distributors knowledge and networks ease export activities for La Côte producers.

Another respondent highlighted that customs duties and transportation costs and logistics were his major hurdles in maintaining a sustainable supply to his existing importers. Consequently, it makes sense that small exporters will favor indirect distribution channels to avoid the costs of implementing a distribution strategy for a relatively low quantity. Obviously, this strategy implies that producers will not get the full benefits of the sales as intermediaries seek profit as well.

5.1.2 Product adaptation

Once the promotion and the distribution strategies are understood producers must adapt their product to meet foreign requirements. The quality, the choice of vineyard and designation are elements that need to be adapted to meet foreign consumer demand. The product adaptation concerns format, labeling and packaging. Last but not least, price adaptation is determinant for sustainable export activities.

5.1.2.1 The importance of the export format

All the exporters in the sample use bottles as the export format. Moreover, 21 out 23 of the producers in the sample believe that the best export format for La Côte wine is in bottle rather than in bulk. These results are consistent with the stated opinion of Mister Gehrig⁹ who is convinced that Vaud producers must export wine in bottles, despite it

⁹ Interview with the Director of Office des Vins Vaudois, May 2018

being more complex in terms of distribution coordination. The reason is the most appropriate format to compete in premium niche markets. Bottles allow the producers to give more added-value to the final product.

5.1.2.2 Place of production, choice of the vineyard:

This section aims at determining whether producers export wine from specific areas of La Côte or not. The relative small size of La Côte region permits producers to have vineyards from various places of productions. Certain places of productions are more recognised than others. This allows producers to sell the wine at a premium. As the domestic demand is stronger for certain places of production, producers could have an incentive to export wine from less recognised places of productions.

The survey did not determine whether one place of production was more exported than another. However, producers tend to favour export of wine issued from vineyards close to the winery location. The correlation between the exported wine's vineyard location and the zipcode of the winery is high. This is probably associated with the size of the vineyards, mostly larger when located around the winery.

Table 15 Correlation table, place of production & export origin

. correlate Zipcode OriginExportA if ConsistentExport == 1 (obs=7)		
	Zipcode Origin~A	
Zipcode	1.0000	
OriginExpo~A	0.9987	1.0000

Source: results from STATA, ROLAZ Julien Etude de Marché La Côte (2018)

The above correlation table shows that the correlation between the location of the winery (variable=Zipcode) and the place of production of the exported wine is closely related, with a coefficient of 99.87%, however the results come from only 7 observations which are regular exporters, (variable = ConsistentExport).

5.1.2.3 Denomination of the exported wine

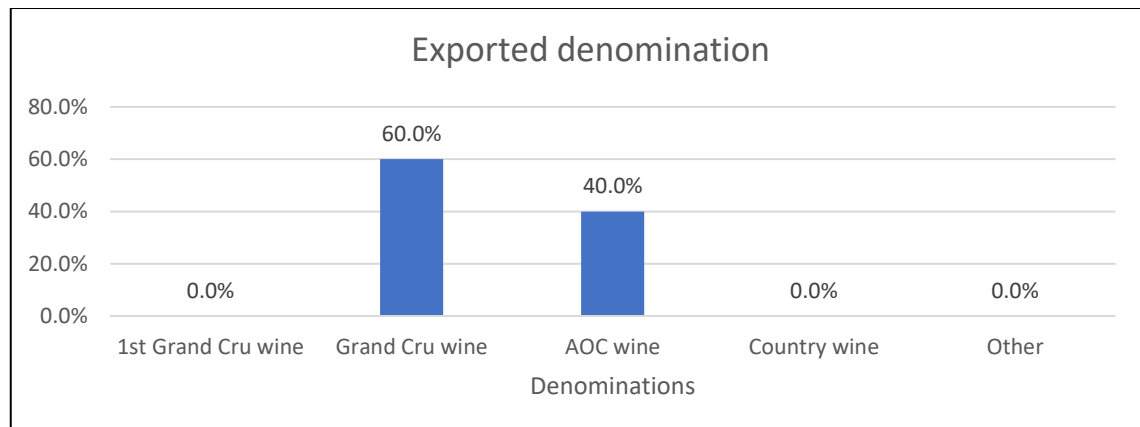
The previous section proved that wine makers do not export La Côte wine from one specific place of production. The place of production does not differ for the domestic or foreign markets.

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As the place of production does not give information on export capacity, quality could. It is essential to identify what is the quality of the exported wine. Is the quality of exported wine higher than the one in the domestic market? In this section the quality is measured based on the wine denomination.

Table 16 Exported denomination



Interestingly, the proportion of exported denomination is higher for Grand Cru than for AOC. Exporters favor higher quality wine and keep AOC wine for the domestic market. The explanation is that most of the Swiss wine consumed in the domestic market is AOC. There is evidence that Swiss wine producers position themselves as premium wine makers in export markets, which therefore justifies exporting higher quality wine such as Grand Cru rather than AOC. The analysis on quality will be further analyzed in section 5.3.4.

5.1.2.4 Designation used for exports:

Two important elements of the product are the name and the designations. Often, they first thing at which buyers look at.

Often the region corresponds to the designation of the wine and people associate the designation with the type of grape, such as Burgundy in France with Pinot Noir. Today Vaud wine is not as recognized as Burgundy. However, Switzerland is perceived as a country producing quality products. Consequently, using Switzerland is an advantage for Swiss producers. Especially, if wine producers want to transmit a qualitative image of their products. Therefore, La Côte producers should mainly export wines under the Swiss flag before using Vaud region or even La Côte.

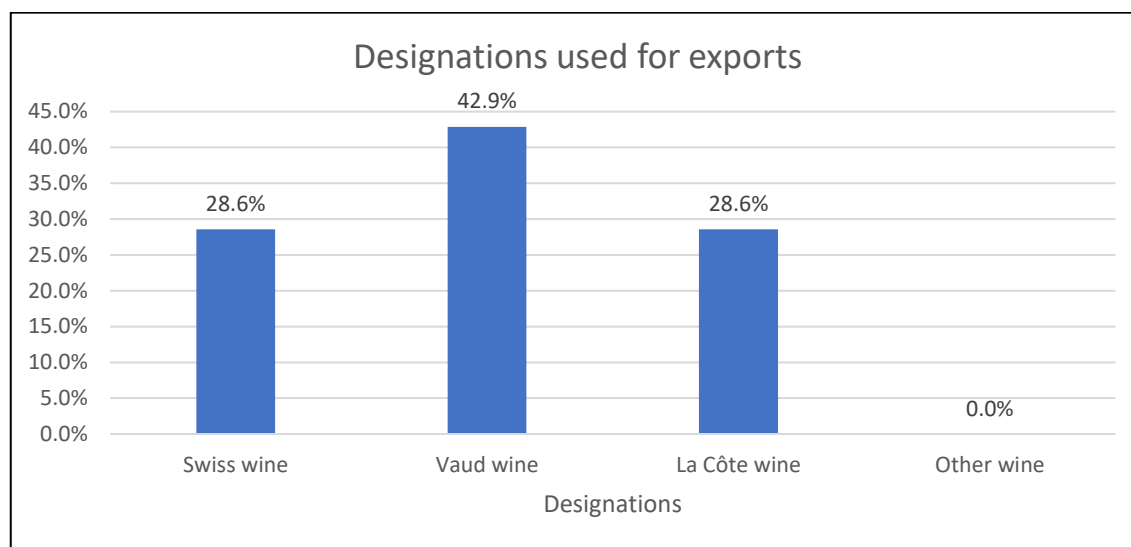
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Based on the below figure, La Côte producers favor the designation of Vaud instead of Switzerland. Do producers use the most suitable designation for their product?

This observation would go beyond the scope of the paper, but it would be interesting to evaluate; how people in exporting markets perceive Swiss wine versus Vaud wine and the associations they have with both denominations.

Table 17 Designations used for the export



5.1.3 Price adaptation

The price is the sole element of the marketing-mix that generates revenue. Therefore, it is essential to adapt the price to meet foreign demand. This section analyses the price difference between the domestic market and the Japanese one. It aims at understanding the hypothetical price positioning of La Côte wine in Japan or similar markets.

The data used is based on published information. In order to compute the price comparison between domestic and foreign market the paper observes the Japanese market. Today certain Lavaux producers are already exporting there. In addition to that, Lavaux and La Côte are in Vaud and the retail prices in the domestic market are easy to find, which ease the price comparison. Moreover, retail price in Japan is based on the published retail price from a Japanese magazine (Club Concierge 2017).

The price comparison is based on the exchange rate CHF JPY 114.9, consequently 1 CHF buys 114.9 JPY. To compare the price difference between both markets and apply it to La Côte producers, this section suggests an average price comparison between domestic market of Chasselas Grand Cru 2015 from Lavaux and La Côte. The choice of

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wine and denomination is related to the published information. Consequently, the comparison is based on the domestic retail price of the Lavaux producers exporting to Japan and the observed La Côte producers retail price.

Table 18 Price comparison of Lavaux wines retail prices in Switzerland & Japan

Producers	Grape	Year of production	Vintage exported	Domestic market price per bottle in CHF	Japanese market price per bottle in CHF	Price ratio
Luc Massy	Chasselas	2015	Grand Cru	18 CHF	78.3 CHF	4.35
Obrist	Chasselas	2015	Grand Cru	23.6 CHF	65.3 CHF	2.75
Bovard	Chasselas	2015	Grand Cru	29 CHF	73.9 CHF	2.55
Domaine du Daley	Chasselas	2015	Grand Cru	19 CHF	62.7 CHF	3.3
Average				22.4 CHF	70.05 CHF	3.15

Source: adapted from Club Concierge (2017)

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The selection of La Côte producers was based on the denomination exported and export experience. Therefore, four La Côte producers have been selected for the price comparison. Only wineries that have more than 5 years' experience in export and export Grand Cru were chosen. This selection aims at having wineries as similar as possible to the Lavaux ones. Therefore, the id 1, 2, 12 and 23 are used for the price comparison as they match the selection criteria.

Table 19 Price comparison of Chasselas Grand Cru between La Côte and Lavaux in Switzerland

Producers	Grape	Year of production	Denomination exported	Domestic market price per bottle in CHF
Id 1	Chasselas	2015	Grand Cru	10.50 CHF
Id 2	Chasselas	2015	Grand Cru	10.80 CHF
Id 12	Chasselas	2015	Grand Cru	12.50 CHF
Id 23	Chasselas	2015	Grand Cru	14 CHF
Average				11.95 CHF
Luc Massy	Chasselas	2015	Grand Cru	18 CHF
Obrist	Chasselas	2015	Grand Cru	23.6 CHF
Bovard	Chasselas	2015	Grand Cru	29 CHF
Domaie du Daley	Chasselas	2015	Grand Cru	19 CHF
Average				22.4 CHF

Source: adapted from published prices from the producers' website

Looking at the retail price in the Swiss market, the paper came up with the following results: the average retail price between La Côte and Lavaux is different. La Côte wines are 1.88 times cheaper in the domestic market. The average retail price for La Côte being 11.95 CHF and 22.4 CHF for Lavaux.

Using the average retail price ratio of the Lavaux producers between domestic and foreign market, La Côte producers could export Chasselas Grand Cru at an average

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retail price of 37.6 CHF = 11.95 * 3.15. Thus, the foreign retail price can be computed with the following formula:

$$Y^1 \text{ Foreign market price} = \text{domestic market price} * 3.15$$

During the interviews, the wine makers were asked to estimate the most suitable foreign retail price for their wine. The purpose was to observe the difference between the domestic retail price and expected sales price for export.

Table 20 Expected sales price for the foreign market

Price per bottle	Regular exporters		Total
	No	Yes	
< 10 CHF	2	0	2
20 CHF to 30 CHF	3	3	6
30 CHF to 40 CHF	10	4	14
> 40 CHF	1	0	1
Total	16	7	23

According to the statistical mode, the expected sales price should be between 20 CHF and 30 CHF. Non- exporters and regular exporters tend to agree with each other on this price range. Therefore, comparing the results with the domestic retail price it makes the expected sales price is about twice more expensive than the observed prices in the domestic market, (table 19).

Using a hypothetical estimated sales price between 20 CHF and 30 CHF, the ideal retail price in the foreign market is between 63 CHF and 94.5 CHF for La Côte Chasselas Grand Cru.

$$\text{Formula Y2: Foreign market price} = \text{expected domestic sales price} * 3.15$$

What do the producers think?

Comparing the perceived ideal retail prices in the foreign markets and the expected retail price in the foreign market, (table 20). The foreign retail price should be between 3 and 5 times higher than the domestic sales price. Thus, the observed wineries in La Côte would like their wine to be retailed at a price range between 60 CHF to 100CHF (using a retail price of 20 CHF per bottle).

Consequently, La Côte wine will be in the same price segment as Lavaux wine. Knowing that the domestic market is willing to pay twice the price for Lavaux wine than La Côte wine. It seems that La Côte producers have higher expectations than the market allows.

Figure 6 Distribution of the ideal retail price between exporting and non-exporting wineries

Ideal Price	Regular exporters		Total
	No	Yes	
< 3x sales price	3	3	6
3x - 5x sales price	10	4	14
> 5x sales price	1	0	1
Total	14	7	21

To be more conservative taking the actual retail price in Switzerland and using the expected retail price in foreign markets, the observed wineries could have a retail price between 35.85 CHF to 59.75 CHF.

*Formula Y³: Domestic retail price * foreign retail price range = expected retail price in foreign market: 11.95 * [3-5] = 35.85 - 59.75*

Consequently, the paper suggests that the foreign retail price should not exceed 59.75 CHF to remain competitive with other Swiss wines in the Japanese market. However, as Dobronauteanu (2014) suggested, the average retail price in Japan is 9 CHF for a bottle of wine. Therefore, Swiss wines and more especially La Côte wine must differentiate themselves to be successful in their export in Asian markets and especially Japan. Only the premium wine market will generate revenue for La Côte producers.

However, it is essential to take into consideration that fixed costs are to be considered. No matter the quantity exported a portion of the price per bottle will be composed of the fixed costs linked to exporting activities.

5.2 What are the characteristics of wineries that limit La Côte wine producer to export?

The second main hypothesis suggests that wineries that are regular exporters have the internal winery characteristics to do so. To capture these characteristics, this section follows the model of Monteiro (2013) on firm characteristics. Two variables are used to identify the first factor, size. The variables are “YearProduction” and “Totalha”, respectively the total production volume and the total surface of production of each winery.

The variable “YearCreation” measures the second factor, age. The number of years in the business and the accumulated knowledge have a positive effect on export performance according to Monteiro (2013).

To complete the model, other variables were evaluated to make a comparative analysis between the two categories of winery, exporting and non-exporting. The legal structure, the quality and the brand name are compared between both group of producers.

The variable “Company” refers to the legal structure of the company. The quality factor is analysed in more depth than in section 5.1.2.3. with a focus on white wine and Grand Cru denomination. Finally, the analysis of the brand name leads to further discussion on brand name perception.

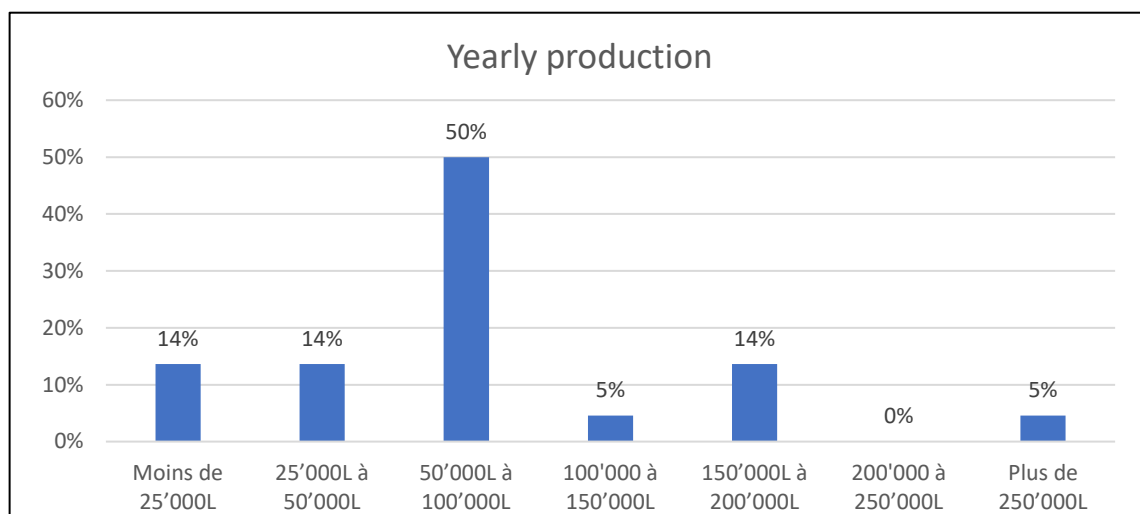
5.2.1 The size of the winery

5.2.1.1 Yearly production volume

Hypothesis 2.a. *The larger the firm is, the more inclined to export it is.*

The observations demonstrate that the statistical mode of the production volume is between 50,000L and 100,000L with a mean at 100,000L per year. The first variable chosen for the linear regression model is “YearProduction” which corresponds to the volume of production per winery in Liter/year.

Figure 7 Yearly production volume



Exporting wineries have at least a volume of production between 50,000L-100,00L. The mean value is close to 125,000L for exporting wineries. Therefore, smaller wineries are less inclined to export.

Figure 8 Linear regression, regular exports & production volume

. regress ConsistentExport YearProduction					
Source	SS	df	MS	Number of obs = 23	
Model	2.52083333	1	2.52083333	F(1, 21) =	22.54
Residual	2.34873188	21	.111844375	Prob > F =	0.0001
Total	4.86956522	22	.221343874	R-squared =	0.5177
				Adj R-squared =	0.4947
				Root MSE =	.33443
ConsistentEx~t	Coef.	Std. Err.	t	P> t	[95% Conf. Interval]
YearProduction	.2291667	.048271	4.75	0.000	.1287816 .3295517
_cons	-.3831522	.1607284	-2.38	0.027	-.7174052 -.0488992

Source: results from STATA, ROLAZ Julien Etude de Marché La Côte (2018)

According to the above linear regression model, the production volume is a determinant factor explaining whether a firm export or not as the P value is significant, $P < 0.05$. Moreover, “YearProduction” variable explains 49.5% of the dependent variable, adjusted R-squared = 0.495.

$$\text{Consistent Export} = -0.38 + 0.23 * \text{YearProduction}$$

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5.2.1.2 Surface of production

Hypothesis 2.a. *The larger the firm is, the more inclined to export it is.*

The second variable selected to measure the size of the winery is the surface of production, "Totalha". The surface of production is measure in hectare as it is the conventional unit of measurement in the agribusiness.

The mode for the production surface is in the range of 5-10 ha, with 31.8% of the wineries having a surface of production between 5-10 ha. As described above in sample's characteristics, the mean for the production surface is of 10.96 ha per winery.

Figure 9 Linear regression, regular export & surface of production

. regress ConsistentExport Totalha						
Source	SS	df	MS	Number of obs = 23		
Model	2.13806164	1	2.13806164	F(1, 21) =	16.44	
Residual	2.73150358	21	.130071599	Prob > F =	0.0006	
				R-squared =	0.4391	
				Adj R-squared =	0.4124	
Total	4.86956522	22	.221343874	Root MSE =	.36065	
Consistent~t	Coef.	Std. Err.	t	P> t	[95% Conf. Interval]	
Totalha	.2422434	.0597493	4.05	0.001	.1179879	.366499
_cons	-.3591885	.1801119	-1.99	0.059	-.7337517	.0153746

Source: results from STATA, ROLAZ Julien Etude de Marché La Côte (2018)

The P value is < 0.05, thus it is significant. In addition to that, the R-squared = 0.412, meaning that the surface of production explains 41.2% of regular exports. However, both R-squared and P values are less significant than in the "YearProduction" linear regression. Therefore, the variable "Totalha" is not kept for the model.

$$Y = -0.35 + .024 * Totalha$$

5.2.2 The age of the winery

- Hypothesis 2.b *The older the firm is, the more inclined to export it is.*

Roberts and Tybout (2014) came to conclusion that the age of a firm is determinant factor for the likelihood of good export performance. Consequently, older wineries should export more than younger wineries.

The results of the survey show that 50% of the wineries have been created between 1950 and 1999 and 30% between 1800 and 1949. Only 10% have been created early 2000's. Interestingly, the share of exporter is almost equal in each group, (YearCreation).

Table 21 Winery, year of creation

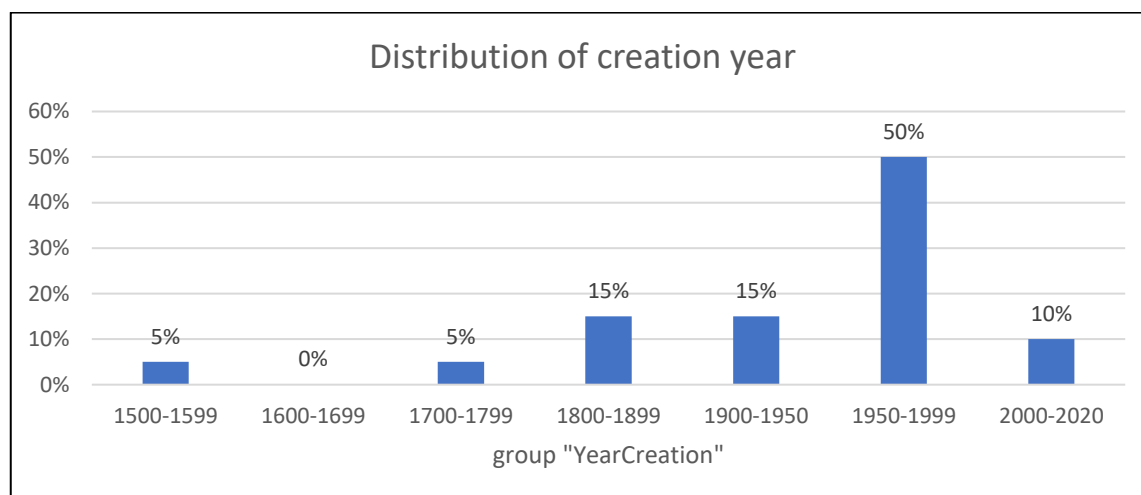


Figure 10 Linear regression, regular export & year of creation

. regress ConsistentExport Creation						
Source	SS	df	MS	Number of obs = 23		
Model	.015851749	1	.015851749	F(1, 21) =	0.07	
Residual	4.85371347	21	.231129213	Prob > F =	0.7960	
Total	4.86956522	22	.221343874	R-squared =	0.0033	
				Adj R-squared =	-0.0442	
				Root MSE =	.48076	
Consistent~t	Coef.	Std. Err.	t	P> t	[95% Conf. Interval]	
Creation	-.0000402	.0001534	-0.26	0.796	-.0003592	.0002789
_cons	.3712959	.2745911	1.35	0.191	-.1997476	.9423394

According to the observations made through a linear regression, there is no sufficient proves to say that the older the winery is the more inclined to be a regular export it is. Consequently, in this model, the age of the winery is not a determinant factor for exporting activities.

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5.2.2.1 Exporting experience

Based on the previous observation the age of the winery is not a determinant for export for La Côte wine producers. However, Monteiro (2013) suggested that the experience in export has a positive effect on export performance. In addition to that, it has been suggested by Jongwanich and Kohpaiboon (2008) that export experience has a positive effect on export performance. Therefore, the variable “TimeExport” and “QuantityExport” should have a strong linkage, same for “TimeExport” and “ValueExport”.

The below figures represent the distribution of the experience in export for the regular exporters according the exported volume and value. The outcome does not suggest that the more experience the greater the export performance is.

Figure 11 Distribution, export experience and quantity exported

Export experience	Quantity exported according to production volume		
	1% to 5%	5% to 10%	Total
1 to 5 years	2	0	2
5 to 10 years	2	0	2
> 10 years	2	1	3
Total	6	1	7

Figure 12 Distribution, export experience and value exported

Export experience	value exported according to sales value		
	1% to 5%	-	Total
1 to 5 years	2	0	2
5 to 10 years	2	0	2
> 10 years	3	0	3
Total	6	1	7

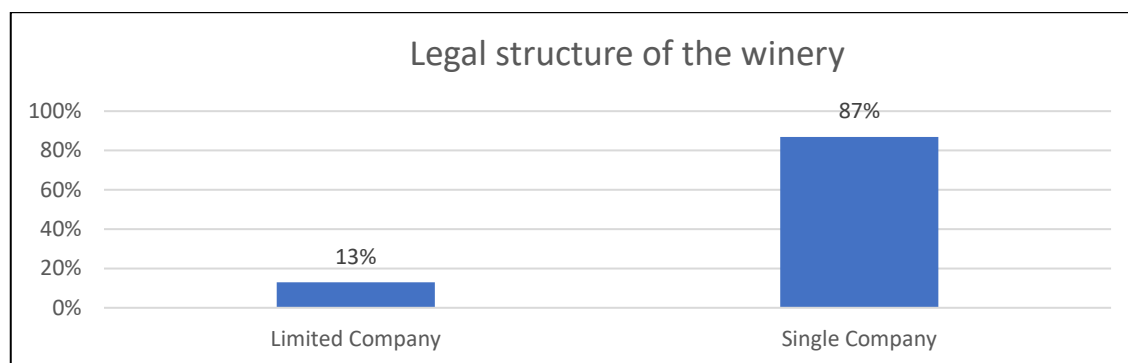
However, it would have been more relevant to measure the producer experience instead of the winery age to determine if the accumulated knowledge of producers has a direct impact on the export performance.

5.2.3 The legal structure of the winery

- Hypothesis 1.c. *The legal structure of a firm can explain its capacity to export.*

Due to demand uncertainty, internationalization is a complex process and often perceived as risky. Thus, to be a regular exporter, it is important to mitigate the risks. Thanks to the judicial forms of Swiss companies, certain type of companies permits separation of legal personality between the company and its owner. Consequently, exporting wineries should favor legal structures that cover the owner's juridical personality.

Figure 13 Legal structure of the winery



Small companies tend to have limited financial resources. Therefore, sole proprietorship companies are very convenient when starting a business as it requires no legal initial capital. Moreover, only its subscription to the commercial register is mandatory when revenue excess 100,000 CHF. In Switzerland, this type of company is the most common one, however the owner of the company endorses the full unlimited responsibility for the company. Consequently, owners may be less inclined to take risks for the company development.

On the other hand, 13% of the observed wineries are limited companies. This legal structure requires an initial capital of 100,00 CHF, which is a relative large sum of money for La Côte wineries. However, the advantages are diverse such as the protection of the private wealth and individual juridical personality. Therefore, owners may have more incentives to take risks to develop their activities as their personal wealth is protected. This has to be taken with caution as the larger the firm is the more inclined to be a limited company it is. The outcome shows that three out of three limited companies are exporting and only four out of twenty sole proprietorship companies are exporting. There is evidence that the legal structure has a positive linkage with exporting activities.

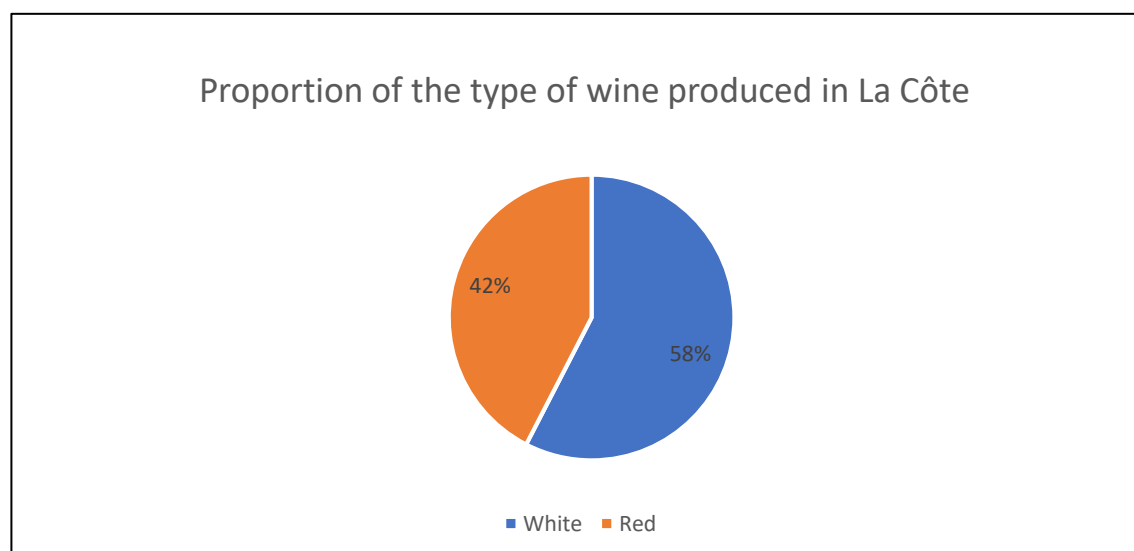
5.2.4 The product quality of the winery

Hypothesis 2.d: *the product quality has a positive effect on exporting activities.*

In descriptive statistics, the statistical mode for the exported quality is Grand Cru, which leads to the following hypothesis: a higher product quality has a positive effect on exporting activities.

The section 5.2.2.3 identified that wineries export more “Grand Cru” wine than “AOC” wine. This section aims at completing the importance of quality as a determinant factor for export performance and understanding the linkage between quality and quantity. The production of wine in La Côte is governed by the « règlement sur la limitation de la production et le contrôle officiel de la vendange ». This law aims at ensuring standards of quality according to various criteria. The production volume and quality are closely related as one can restrict the other due to the legislation put in place by the « règlement sur la limitation de la production et le contrôle officiel de la vendange » (RLPV). The productions’ rights are attributed to each producer according to the total surface of production, the production location and the denomination produced. However, it is not possible to access to the production capacity of each producer. Therefore, the paper assumes that each producer maximizes its production capacity to benefit a maximum from economies of scale. The maximum production rate per m² for white and red AOC wine allowed by the State of Vaud, are 1.12L/ m² for white wine and 0.96L/ m² for red wine. Consequently, this could explain a higher production of white wine in La Côte.

Figure 14 Proportion of the type of wine according to the survey



What are the factors limiting La Côte wine producers to export?

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The production rates are not fixed, every year the CIVV (Centre interprofessionnel des vins vaudois), a committee composed of producers and wine traders of La Côte debate about the future production rate per place of production, grape and quality. The purpose of this committee is to regulate the market supply according to the existing stocks and environmental factors that could affect the production rate. Together producers and wine traders agree on the next year production rates and submit their proposal to the State of Vaud and mostly ratified by the Minister of Winery.

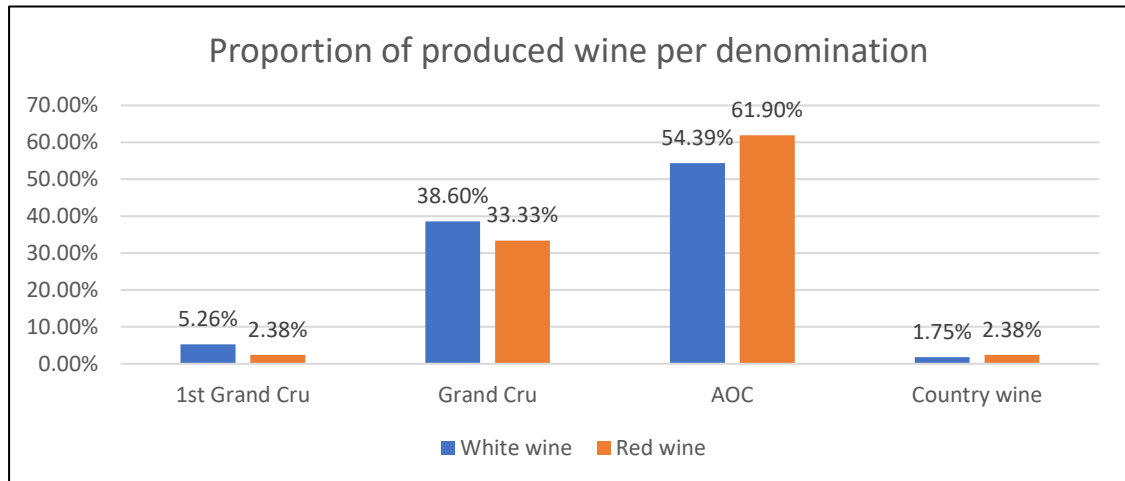
Beside the proposal from CIVV that becomes binding to the producers, Grand Cru requires producers to reduce the production rate. This aims at reducing the density of grape per m² to increase the sugar content within the grape. Moreover, producers must prove to the authorities that at least 90% of the produced wine is originated from the specified place of production, the exact vineyard (Législation Vaudoise 2009).

The 1st Grand Cru is the most complex to produce. Beside the demanding legislation an institution named “Commission des Premiers Grands Crus” regulates the denomination’s procurement (Législation Vaudoise 2009). The survey results highlighted the complexity of 1st Grand Cru production as the total production is around 5%, (figure 16).

Consequently, wine producers can produce wine from “1st Grand Cru” to “Country wine”. This ability to change their production quality allows winemakers to adapt to the market demand. Today in Switzerland most of wine consumed in Switzerland is AOC. Therefore, it is logical to see that La Côte producers favor AOC production rather than other denominations as their main market is Switzerland.

Taking a closer look on the production distribution according to the quantity; the observation of the sample shows that AOC white and red denomination are the most produced ones. This proves that quantity and quality are closely related.

Figure 15 Proportion of produced wine per denomination



On the other hand, the statistical mode for the white wine production volume is Grand Cru for 20,000L up to 50,000L per year per producer. Whereas, red wine's production volume's mode is AOC denomination for 20,000L up to 50,000L per year and per producer.

Figure 16 White wine production volume per denomination

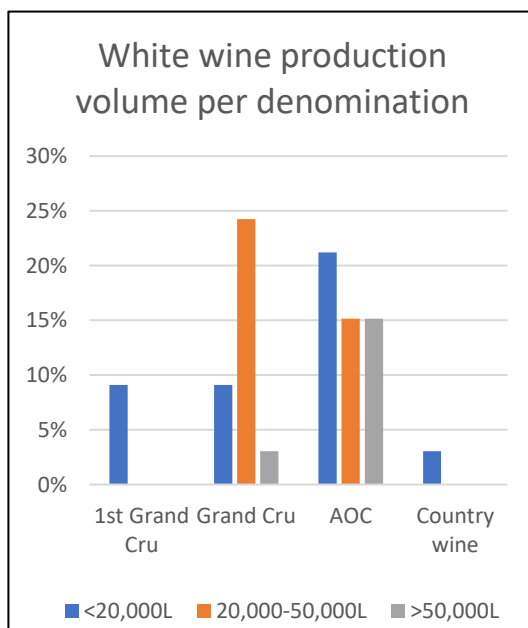
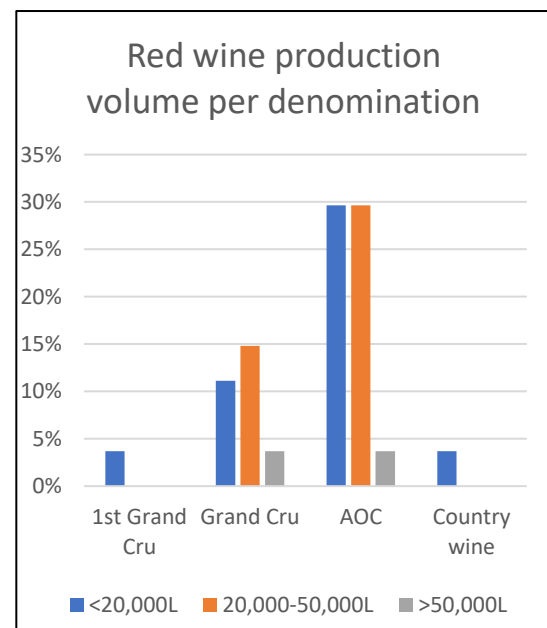


Figure 17 Red wine production volume per denomination



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Despite having various production rates per grape and per year, producers may not be able to adjust their production to maximize their production capacity. The reason is mostly explained by the fact that vineyards require two to three years to become profitable. Therefore, producers have no incentive to switch from one grape to another between years. Consequently, the production volume per year is quite stable, except under environmental catastrophe such as in 2017 when the total Swiss production decreased by 18%. Thanks to its particular climate, La Côte did not suffer from hail that destroyed some regions to almost 20% of the grapes (Le Gel a Touché la plupart des Régions Viticoles 2017).

The production proportion between white and red wine in La Côte is of 67.59% for white wine and 31.75% of red wine. Whereas, the sample proportion is of 58% for white and 42% for red wine. The Interview with Benjamin Gherig¹⁰ confirmed that most of the exported wine in Vaud is white wine.

To compute the mean value of the quantity produced for quality white and red wine, (denominations being AOC and Grand Cru), the data have been group in two new variables; "WhiteQuality" and "RedQuality". This aims at understanding whether white of superior quality is more produced than red white of superior quality.

Null hypothesis: RedQuality = WhiteQuality

Figure 18 T-test two sample means "RedQuality" = "WhiteQuality"

. ttest WhiteQuality == RedQuality, unpaired						
Two-sample t test with equal variances						
Variable	Obs	Mean	Std. Err.	Std. Dev.	[95% Conf. Interval]	
WhiteQ~y	23	2.478261	.3071581	1.473079	1.841254	3.115268
RedQua~y	23	1.869565	.1917709	.9197009	1.471857	2.267274
combined	46	2.173913	.1846902	1.25263	1.801928	2.545898
diff		.6086957	.362108		-.121085	1.338476
diff = mean(WhiteQuality) - mean(RedQuality)				t =	1.6810	
Ho: diff = 0				degrees of freedom =	44	
Ha: diff < 0		Ha: diff != 0		Ha: diff > 0		
Pr(T < t) = 0.9501		Pr(T > t) = 0.0999		Pr(T > t) = 0.0499		

Source: results from STATA, ROLAZ Julien Etude de Marché La Côte (2018)

¹⁰ Interview with the Director of Office des Vins Vaudois, May 2018

According to the results of the two samples t-test, the null hypothesis can be reject, thus white wine with a higher quality standard is more produced than red wine for similar quality. Consequently, the more white wine of superior quality is produced, the more the more the winery is inclined to exported it.

Figure 19 Linear regression, regular exports & quality white wine

. regress ConsistentExport WhiteQuality						
Source	SS	df	MS	Number of obs = 23		
Model	2.84406431	1	2.84406431	F(1, 21) = 29.49		
Residual	2.02550091	21	.096452424	Prob > F = 0.0000		
Total	4.86956522	22	.221343874	R-squared = 0.5840		
				Adj R-squared = 0.5642		
				Root MSE = .31057		
Consistent~t	Coef.	Std. Err.	t	P> t	[95% Conf. Interval]	
WhiteQuality	.2440801	.0449489	5.43	0.000	.1506037	.3375566
_cons	-.3005464	.1288506	-2.33	0.030	-.5685059	-.032587

Source: results from STATA, ROLAZ Julien Etude de Marché La Côte (2018)

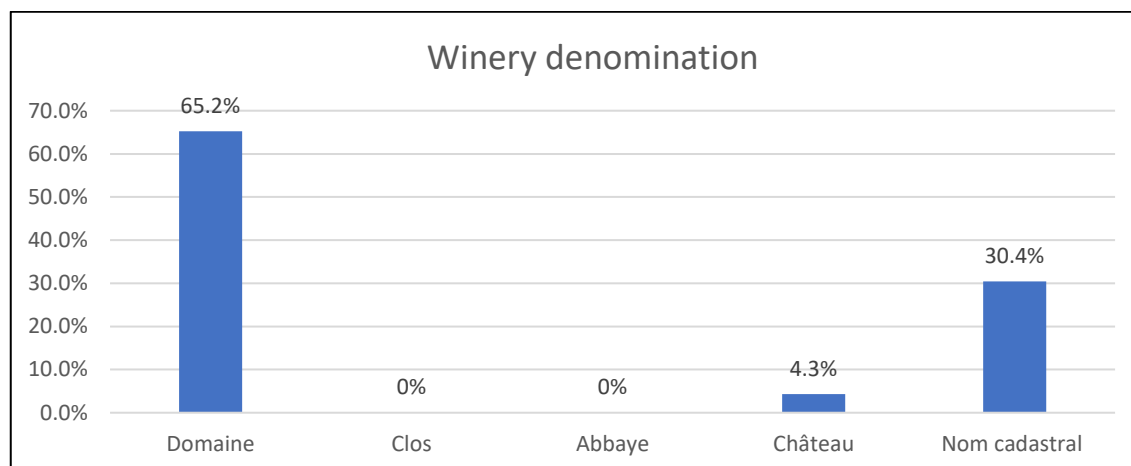
There is evidence according to the P value < 0.05 that qualitative white wine is determinant for exports and the adjusted R-squared shows that the dependent variable variation is explained by 56.4% by the variable "WhiteQuality".

5.2.5 The brand name of the winery

Hypothesis 1.e. *The firm brand name positively influences export performance.*

The last internal winery characteristics is the winery denomination, being the brand name of the winery.

Figure 20 Winery denomination



Under the law denomination of the winery does not induce production of quality wine (Législation Vaudoise 2009). However, certain wineries are subject to quality standards. The following denominations: “Clos, Domaine and Château” wineries are often registered to Association of “Clos, Domaine & Château”¹¹. Under the rules of the association, members must follow a set of rules in terms of production quantity in order to match higher quality standards. Consequently, wineries must have a production output 10% lower than authorized by the Integrated Production ¹²(IP Suisse) standards, named Vitiplus¹³ for the Vaud region. In addition to that, Art. 13, 14 and 15 of the association’s rules enhance a production of quality through a strict wine making process (Fuchs and Schenk 2009 p ° 3–4).

There is no proof to conclude that most of Domains and Châteaux respect the above criteria. Nevertheless, most of the La Côte producers respect the IP-Suisse standards as 80% of the wineries of Vaud Canton are Vitiplus members (Blanc Frédérique 2018,

¹¹ <https://c-d-c.ch/fr/>

¹² <https://www.ipsuisse.ch/fr/>

¹³ <http://www.vitiplus.ch/sites.asp?siteid=vitiplus>

p. 1–2). Interestingly, nine out of twelve wineries that already exported wine were Domaine and Château. Moreover, the proportion of regular exporter having “Domaine & Château” for their denomination is the majority. The outcomes of the observations are bias as most of the observed wineries are “Domaine”. The analysis of the perception of the brand name and its impact on export performance goes beyond the scope of this paper.

5.2.6 Multi variable regression model, winery’s internal characteristics favoring export capacity.

The question of interest is to identify the variables considered as determinant for exports to build a multi variable regression model. According to the above observations two variables are considered to be determinant factors for exporting activities, “YearProduction” and “WhiteQuality”. The other variables can be excluded from the model due to the lack of observations or bias linked to the collinearity between variables.

Figure 21 Multi variable regression model

. regress ConsistentExport YearProduction WhiteQuality						
Source	SS	df	MS	Number of obs = 23		
Model	2.9211285	2	1.46056425	F(2, 20) = 14.99		
Residual	1.94843672	20	.097421836	Prob > F = 0.0001		
Total	4.86956522	22	.221343874	R-squared = 0.5999		
				Adj R-squared = 0.5599		
				Root MSE = .31212		
ConsistentEx~t	Coef.	Std. Err.	t	P> t	[95% Conf. Interval	
YearProduction	.0776298	.0872831	0.89	0.384	-.1044396	.259699
WhiteQuality	.177409	.0875213	2.03	0.056	-.0051572	.359975
_cons	-.3682074	.1501888	-2.45	0.024	-.6814958	-.05491

Source: results from STATA, ROLAZ Julien Etude de Marché La Côte (2018)

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5.3 What is the perception of the factors limiting La Côte wine producer to export?

- *The more the producers perceive the barriers as important, the less inclined to export he or she is.*

The following table represents the mean values of the barriers' perception. The variables are divided in two groups, external and internal barriers. The grade given for each variable is based on a scale of importance from 1 = not important to 4 = very important. Therefore, the higher the grade is, the more the variable is considered as constraining for export.

5.3.1 Perception of the internal & external barriers

Table 22 Means of observed variables for barriers 'perception

Observations	N=21	N=7	N=14
Variables	Mean	Mean, ConsistentExport = 1	Mean, ConsistentExport = 0
External Factors	2.5		
Export Tax	2.6	2.6	2.6
Customs	2.6	2.7	2.6
Swiss wine image	2.6	3.1	2.3
Lack of support	2.6	2.9	2.4
Exchange rate	2.6	2.7	2.1
Competition	2.3	2.6	2.1
Transportation Costs	2.6	2.4	2.1
Uncertainty of orders	2.1	2.3	2

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Lack of trust with trade partners	2.1	2.4	1.9
Internal Factors	2.4		
Finding commercial partners	2.9	3.1	2.7
Production costs	2.8	3	2.6
Packaging	2.6	2.6	2.1
Logistic	2.5	2.9	2.4
Linguistic barrier	2.1	2	2.1
Lack of financial resources	2.1	2	2.2
Production volume	2.1	2.4	2

Source: (Appendix 4)

The attitudinal management characteristics on the perception of constraints limiting export influences the winery export capacity and willingness. According to the above observations, internal and external barriers are perceived as almost equally constraining with a mean value of 2.5 for external barriers and 2.4 for internal barriers.

Export tax and customs:

“Export duties consist of general or specific taxes on goods or services that become payable when the goods leave the economic territory or when the services are delivered to non-residents; profits of export monopolies and taxes resulting from multiple exchange rates are excluded” (OECD 2001, p° 1).

Since the ratification of the trade agreement on agricultural goods between Switzerland and the European Union, 1st June 2012. The trade of wine between both parties has increased and became significantly less complex (Accord Entre La Confédération Suisse et La Communauté Européenne Relatif Aux Échanges de Produits Agricoles 2002, p° 79).

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Therefore, in Switzerland no custom duty is payable on the goods exported nor VAT. However, Swiss wine is subject to sanitary control, which is mandatory for export of more than 100 liters of wine to the European Union. On the other hand, exports outside the European Union are based on the foreign country sanitary requirements. Despite, no custom duty payable, exporting wineries must pay the sanitary control based on Appendix 5.

Swiss wine image:

La Côte wine producers believe that the weak image of Swiss wine affects their ability to export. However, a recent study suggests that the poor image of Swiss wine is due to its low exportation volume. Therefore, Swiss Wine Promotion is working on the Swiss wine image perception abroad, while supporting the producers to increase their exporting activities. According to SWP, both, Swiss wine image and export volume must raise together to achieve growth of Swiss wine exports (Agrihebdo 2018). It seems that image perception and export quantity have a strong relation.

Lack of support from Swiss wine institutions:

The results of the questionnaire show that producers don't have enough support from Swiss wine institutions such as SWP or OVV. Interestingly, regular exporters perceive the lack of support from the institutions even more constraining than the non-exporter.

Table 23 Mean comparison on perception of support from Swiss Institution between regular exporters and non-exporters.

<code>. mean LackSupport if ConsistentExport == 1</code>				
Mean estimation		Number of obs		= 7
	Mean	Std. Err.	[95% Conf. Interval]	
LackSupport	2.857143	.340068	2.025026	3.689259
<code>. mean LackSupport if ConsistentExport == 0</code>				
Mean estimation		Number of obs		= 14
	Mean	Std. Err.	[95% Conf. Interval]	
LackSupport	2.428571	.4285714	1.502699	3.354444

Source: results from STATA, ROLAZ Julien Etude de Marché La Côte (2018)

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The mean value for regular exports equals 2.86 whereas non-exporters mean value equals 2.43.

Exchange rate:

The results show that regular exporters perceive the exchange rate as major barrier (mean = 2.7), significantly more than the non-exporters (mean = 2.1).

Since the beginning of the year, the Swiss Franc has weakened against the Euro, making exports more competitive in the European markets. However, it has not been the case since the abolition of the Swiss Franc floor rate against the Euro. This strengthening of the Swiss Franc was perceived as a major constrain for exporting activities, and certain Swiss wine producers even had orders cancelled (Bilan 2015). On the other hand, according to certain specialists, a strong CHF has forced Swiss companies to increase their product quality to remain competitive in international markets. Was it the case for Swiss wine producers?

Competition:

The fear of competition exists in Switzerland, this is especially true as most of the wines present in the domestic market are foreign wines. They are often cheaper than Swiss wine for comparable quality. Therefore, Swiss producers face internal competition from cheap wines and similar competition in foreign target markets. However, Swiss consumers have a higher purchasing power, making local wine affordable but in foreign markets people tend to have lower purchasing power making Swiss wines relatively more expensive than its competitors ones.

Finding commercial partners and lack of trust with trade partners:

Finding commercial partners requires increasing brand awareness, therefore certain method such as wine fairs and international wine contests allow to do so. However, wine fairs and international wine contests are relatively expensive for small producers. In addition to that, Benjamin Gehrig added that building a network is complex and time consuming. Consequently, La Côte wine producers are often limited in term of financial resources to develop and maintain their networks, which in the long run could cause loss of trusts in commercial relationships.

Production costs:

Production costs are recurring concerns for Swiss firms, as the labour cost in Switzerland is relatively higher than in neighbouring countries, almost twice more expensive than in

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the EU 15 (Federal Statistical Office, 2012). Switzerland has one of the highest wine price for low quality but certainly has homogenous wine quality with very good price quality ratio (Swiss Wine, 2017a, p° 1). From this statement, production costs should not be the main concerns for La Côte producers. However, production cost is perceived as the second main constrain for exporting activities, mean value = 2.8. Despite this result, the paper suggested that Swiss wines can only compete with larger wine producing countries in specific niche markets.

Packaging & Logistic:

Despite favouring indirect exporting method, wineries still perceive the transportation logistic as a major constrain for export. In order to better understand the reasons behind it, two regular exporters were interviewed. Their answers were very similar, the main issue is to secure the wine and prepare it for the shipping, (packaging), each country or importer have different requirements, standards. Therefore, producers must adapt their packing chain for each export, even for small shipments.

In addition to that, even if winemaker have an intermediary that resales the wine in the foreign market, exports are mostly done through Delivered Duty Paid (DDP), where the seller bears the risks and costs of the main carriage and must insure the goods until delivery. Therefore, if anything happens until the reception of goods, the seller is responsible for it (Incoterms® rules 2010, 2010).

Production volume:

As seen in the section winery internal characteristics, the production volume is certainly a determinant factor for exporting activities. Looking at the mean values between regular exporters and non-exporters, the regular exporters perceive production volume as more constraining than the non-exporters. One respondent mentioned that exports are dependent on a constant production volume. Therefore, a stable production volume is essential to ensure the supply in the domestic market first and then in the foreign market. In addition to, he pointed out that fidelity in the foreign market is lower, therefore securing the domestic market is more important. Consequently, producers cannot forecast their exporting activities a long time ahead, because the supply relies on the harvest.

5.3.2 Motivations to export wine

The interest in exporting wine from La Côte is certain. The survey demonstrates that 70% of the interviewed winemakers were willing to export. Moreover, more than half of the unsuccessful exporters would export again.

Figure 22 Winemakers interested to export wine

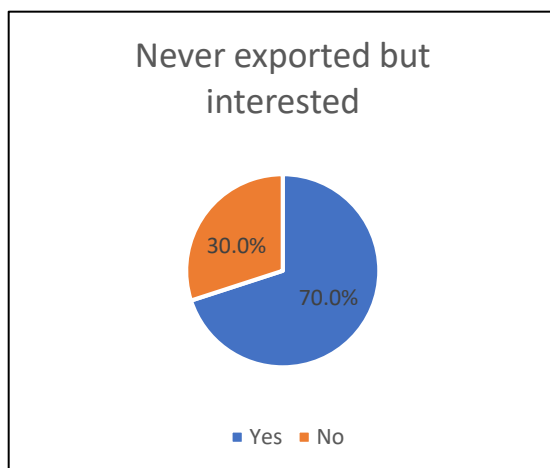
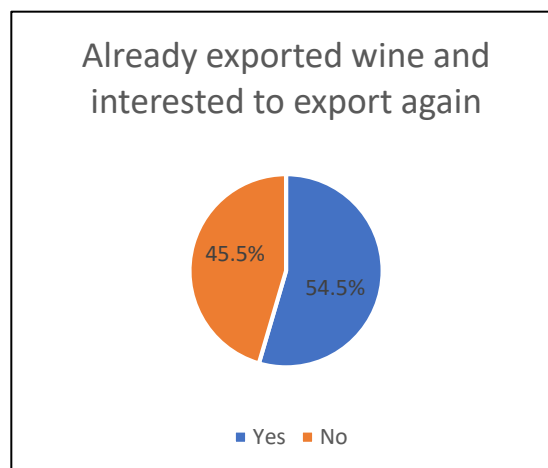
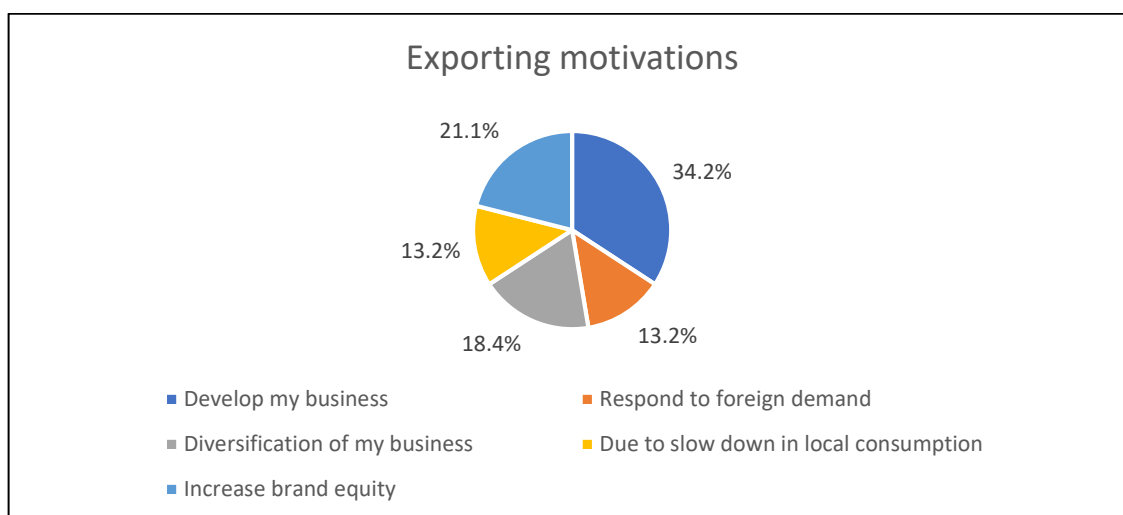


Figure 23 Unsuccessful exporters willing to export again



The main motivational factor for export is “developing its business” for 34.2% and the second one is “increase brand equity” for 21.1%. When looking at regular exporters six out seven winemakers have for main reason to export “Increase Brand Equity”.

Figure 24 Exporting motivations



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The second part of this sections aims at evaluating the interest of the observed wineries to export to Asian countries.

The survey shows that 70% of the observed wineries are interested to export to Asia. One third of the interviewed wineries does not consider Asian markets as attractive for La Côte wine. The main reason considered by these producers is the lack of support from Swiss wine institutions.

Despite, some skeptical producers, the Asian market is perceived as a valuable and attracting market for La Côte producers. In addition to that, the paper already explains why certain markets such as Japanese and Chinese could be of great interest to export Swiss wine. The section 5.4 provides a potential solution to La Côte producers who want to export but perceive the barriers as too constraining.

5.4 How could collective actions allow La Côte wine producers to increase their exports?

- *Collective actions allow producers to enhance their export performance.*

The observed wineries have been asked to rate which potential solutions could enhance the exporting activities of La Côte producers. The winemakers were asked to rank the potential solutions according to a scale of importance, from 1 = Not important to 4 = very important.

Figure 25 Mean potential solutions to enhance exports

. mean GovSupport LessBureaucracy CommercialAgreements TechSanitary CreditAccess Consortiums				
Mean estimation	Number of obs = 11			
	Mean	Std. Err.	[95% Conf. Interval]	
GovSupport	3.272727	.2727273	2.665053	3.880402
LessBureaucracy	2.727273	.3327819	1.985788	3.468757
CommercialAgreements	3	.3015113	2.328191	3.671809
TechSanitary	2.636364	.3377123	1.883894	3.388833
CreditAccess	2	.3015113	1.328191	2.671809
Consortiums	3.727273	.1408358	3.413471	4.041074

Source: results from STATA, ROLAZ Julien Etude de Marché La Côte (2018)

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From these observations, two variables have a mean > 3, which are considered as important to enhance export. The creation of an export consortiums has a mean of 3.7 and increasing government support has a mean of 3.27. Both are perceived as important to very important to increase exporting activities. Therefore, the following case study focuses on an existing export consortium that allowed Lavaux producers to increase their exports.

5.4.1 Case study of an export consortium of Lavaux wineries

The interest to export to Asian markets is certain. In addition to that, winemakers believe that an export consortium could ease exporting activities.

Therefore, this section identifies the benefits and drawback of an existing export consortium. The export consortium has been created in Lavaux, the neighboring region of La Côte, well known for its location protected by the UNESCO¹⁴.

The consortium was created following a first visit to Japan. The voyage was organized by OVV in 2012. Benjamin Gehrig explained that the OVV organized the trip and payed all the costs. Because the role of OVV is to support exporting pioneer in the discovery phase. Therefore, OVV build in advance a meeting session with Japanese wine specialists in a five-star hotel to help producers to understand the market. Consequently, the discovery phase was eased as the producers had only to present their wines to the invited wine specialists.

At the first stage of the internationalization process in the Japanese market, only fourteen producers from the Vaud region were present.

According to Benjamin Gehrig what triggered the creation of the export consortium was the commitment of certain Lavaux producers to promote their region. Luckily a well know Japanese editor fell in love with the Chasselas and Lavaux region. Therefore, it is how the interest and the need for an export consortium was born.

The consortium was developed between the producers and the editor. This collaboration allowed producers to secure a defined quantity to first penetrate the Japanese market.

Through the questionnaires, certain factors such as “finding trade partners”, “export logistic”, “customs duties” and “packaging” were perceived as important constrains.

¹⁴ <https://en.unesco.org/about-us/introducing-unesco>

However, in this case the work from OVV beforehand allowed producers to reduce certain perceived barriers and risks. The survey suggested that the wineries perceive the elements of the discovery phase as more restraining than others. For that reason, the role of OVV in supporting wineries is essential to increase exporting activities.

The export consortium allowed the producers to benefit from economies of scale by regrouping orders. This permitted transportation costs reduction per producers. In addition to that, Lavaux producers gained knowledge by sharing their experiences among members. Certain barriers such as the complexity of custom duty and language have completely disappeared as each member brought their expertise to each phase of the export.

Based on the proxies of export performance, the consortium can be considered as successful:

- Export sales ratio has increased from 2012, the exporting value increased
- The regular orders allowed producers to gain experience in exporting operations
- Export volume is constant, increased slightly between the years
- No information on the export coverage

In figures, Mister Gehrig estimated the sales volume to represent 30,000 to 40,000 bottles per year at an average price of 70 CHF per bottle. The average total sales amounts between 2.1 Mio to 2.8 Mio CHF for the export of Lavaux wine.

According to Mister Gehrig, this export consortium has generated synergies between the members and also with the foreign partners. Activities related to Japanese gastronomy and Swiss wine have been developed.

Despite being successful, an export consortium does not only bring benefits to its members, often internal competition can occur or cannibalization, which could lead to a decrease of performance. However, no information was collected on eventual disputes between members.

This section was subjected to an additional interview with the main wine exporter from Vaud. The interviewed would have brought more information on the benefits from an exporting consortium. Moreover, it would have permitted to compare the barrier perception between a member of an export consortium and individual exporters.

6. Discussion

Given the size of the sample the statistical analyses need to be taken with caution. In addition to that, the results can be biased by the type of wineries that participated to the survey. Indeed, only relatively large wineries from La Côte replied to the questionnaire, whereas smaller entities often rejected to take time for the research due to a lack of interest and time. The outcome of the questionnaire also revealed some results that go beyond the scope of the research, therefore certain elements could be taken for further studies.

6.1 The importance of marketing-mix:

In order to export, independent wineries must take care of their marketing-mix. The results showed that promotion and distribution adaptation were essential factors for exporting activities. Exporting wineries tend to invest more in the promotion, most of the observed wineries that export participate to wine fairs and believe that digitalisation can enhance brand recognition abroad, by using their website or social media.

Distribution is determinant, because it is a major source of risks and costs for exporters. Producers must determine with precision which type of distribution channel is the most favourable. The results suggested that indirect channel allows risks and costs reduction for exporters, especially for relative low export quantity. However, indirect distribution channel could lead to loss of control of the products.

Product adaptability is essential for brand recognition, which is a factor of quality perception. There is evidence that the Swiss wine and more particularly La Côte wine competes in the premium price range. Therefore, it is essential to export in bottle rather than in bulk. Some elements on the bottle are essential such as the place of production, denomination and designation. The results showed that most of the exporters tend to use Vaud designation before using Switzerland. Wouldn't it be more efficient to use the image of Switzerland for a higher quality perception? The main takeaway for product adaptation is; creation of added-value perception for the consumers.

The price observation recommended that La Côte wines foreign retail price per bottle should not exceed 3.15 times the domestic retail price. Despite this recommendation, producers favour a price range between 3 to 5 times the domestic retail price per bottle. On the other hand, regular exporters were more conservative on the foreign retail price

than non-exporters. Therefore, a conservative retail price in Japan would not exceed 60 CHF for a bottle of Chasselas Grand Cru from La Côte.

6.2 The winery's characteristics are determinant for exporting activities.

La Côte wineries are mostly small compared to wineries in major exporting countries. Nevertheless, the outcome of the analysis demonstrated that the volume of production, size of the winery is determinant for export. The literature suggested that the age is determinant for exporting activities, as it permits the accumulation of knowledge. However, there were no evidence on the observations to validate it.

The financial capacity of the wineries can be expressed by their legal structure, the results highlight that producers who were protected by the legal structure of their winery took more risks and are regular exporters. The lack of observations could bias this outcome; however, it makes sense that limited companies export more, because of the ability to raise capital with shares.

Wineries that have the capacity to produce more quantity of higher quality wine tend to export more, especially if the production focus on Grand Cru. The largest proportion of exported wine is Grand Cru white wine, whereas domestic market sales are dominated by the AOC. To which extend producers would shift their production from AOC to Grand Cru to increase their export?

In addition to that, the paper observed that the brand name affects export performance. Consequently, companies using a name such as Domaine or Castel are more likely to export, probably because consumers perceive a higher quality. However, this suggestion goes beyond the scope of this paper and could lead to further researches.

6.3 The role of management:

The identification of the role of management in export performance goes beyond the scope of this research paper. However, as the manager, the wine producer is the key determinant for export activities. Consequently, the perception of internal and external barriers can constrain exporting motivations and or reduce export performance.

The results demonstrated that external factors such as Swiss wine image and the lack of support from Swiss wine institutions were the main constraints. In addition to that, two

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internal factors were considered as important constraints, finding commercial partners and the logistic. Interestingly, regular exporters tend to perceive these factors as more constraining than non-exporters.

According to the observations, wineries were interested to export, and especially to Asia 70% of the sample. Despite this high level of interest 54.5% of the wineries already exported wine at least one time but only 30% remain as regular exporters. Therefore, certain motivations could influence export performance. Wineries that export to develop their business or increase their brand equity are more successful than other exporters.

6.4 Export consortium

The export consortium allowed costs reduction. The consortium members can share certain costs such as administrative and promotional costs. Moreover, grouping orders reduce packaging and transportation costs. Despite, cost reduction, it seems that risk reduction is more linked to the support of OVV, because the main identified risks occurs in the discovery phase. Later other risks were identified such as the availability of supply and regular orders.

6.5 The importance of OVV¹⁵ and SWP¹⁶

The role of OVV and SWP should not stop at rising awareness of Swiss wine abroad based OVV and SWP should support the producers in their internationalization process. This is especially true, when looking at the performance of their activities. OVV allowed the creation of an export consortium to Japan, because it internalized the costs of the discovery phase by finding trade partners, securing export logistic and managing custom duties.

On the other hand, SWP does not support producers in the same way. The support from SWP aims at providing governmental funds. Basically, SWP propose an export package to all Swiss wine producers. The package includes the budget and other relative information about the target market. The problem arises when the producers want to join force to take part to the project, because, the financing from SWP comes from the Swiss

¹⁵ Office des Vins Vaudois

¹⁶ Swiss Wine Promotion

state which has complex requirements. The state wants at least three producers from each Swiss wine region. According to an interviewed producer, this method is not efficient, because the main issue is not financial but rather cultural. Moreover, the coordination between producers from each region seems not possible according to Benjamin Gehrig. This complex and time-consuming export mechanism proposed by SWP does not allow producers to increase their exporting activities as it does not eliminate their main constraints. This could explain the low grade attributed to Swiss Wine Promotion by La Côte producers for their support towards Swiss wine export.

6.6 Recommendations:

Could Asian markets where the demand for wine is increasing, allow La Côte producers to increase their export performance?

Today the exporting wineries of La Côte export a small proportion of their production, less than 5% of the total production. However, the interest and need to export is increasing. Despite of this the report from SWP (2017) shows that exports are not increasing despite a small increase in value. In addition to that, the saturation of the European market and the competition reduce the opportunities for La Côte producers to increase their exporting activities within the EU countries.

According to the results of the questionnaire and the case study, La Côte wine producers should create an export consortium to export to Asian markets where the demand for wine is increasing and offer greater opportunities than in the EU. Therefore, Japan and China are relevant foreign markets for La Côte wines. In addition to that, there are evidence that individual pioneer activities are not always successful, making collective actions more relevant for these activities.

Consequently, the geographic distribution of the wineries in La Côte is favourable for collective actions as wineries share many common characteristics. First of all, regular exporter uses similar promotion and distribution strategies, easing collaboration on this point. As observed, other elements of the marketing-mix are determinant for export such as the product itself and its price. For the product format and quality, the results suggest that bottles of white wine Grand Cru should be exported, for a matter of added-value.

Furthermore, exporting wineries have a similar size, with a mean size between 15 ha and 20 ha. Moreover, their production of white wine is AOC and Grand Cru mostly.

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Therefore, their ability to produce white wine of quality is certain and the switch from AOC to Grand Cru is not very costly, despite, certain complexity linked to the production requirements.

The role of the management is determinant for export performance so are the motivational factors. Monteiro (2013) suggested that high barriers perceptions reduce export capacity. However, this paper showed that the barriers perceptions do not influence export or the effect is low when the winery is a regular exporter. However, non-exporters tend to fear more exporting activities when the barrier perception increases. The case study on Lavaux export consortium shows that producers can increase exporting quantity while reducing relative costs and risks per unit due to the economies of scale. However, certain fixed costs and sunk costs cannot be eliminated.

7. Conclusion

This research paper explored the determinants of La Côte wineries to export based on the external and internal characteristics of each winery.

The supply of wine in the domestic market is mainly driven by foreign wines, representing more than half of the Swiss consumption. Therefore, Swiss producers fear strong competition in their own market. In addition to that, despite being the favourite alcoholic beverage in Switzerland, wine consumption per capita is decreasing.

The Swiss neighbouring countries are all wine producing countries, where imports represent only 10% of their total consumption. In the EU, the consumption of national wine represents 60% of the total consumption. Based on these observations Swiss wine producers, more particularly La Côte wine producers have narrow space to penetrate the EU market.

Naturally, came the idea to focus on countries where the demand for wine is increasing. Today Asian countries have the fastest growing markets, China and the rise of its middle-class disposal income and Japan with its consumer seeking for added-value goods are markets that could fit Swiss wine characteristics. Moreover, Switzerland has FTAs with both countries that facilitate trade among each other.

Despite having FTAs certain barriers are still restraining producers to export These barriers are categorised according to the adapted model of Monteiro (2013). The findings

indicate that wineries that export differ in their internal characteristics relative to non-exporters.

1) Marketing-mix strategy

The results demonstrated that wineries that export invest more in the promotion, by developing website, social media and wine fair participation. In addition to that, exporters use mainly indirect distribution channel as it allows cost and risk reduction. There is evidence that product adaptation is essential to export. The format and the designation are key determinant for exports. The paper came up with price suggestion for La Côte exporters based on the Lavaux case study and the observed wineries price opinion. Consequently, price adaptation is essential for exporting performance.

2) Winery characteristics

In terms of internal characteristics, a consistent positive and significant linkage was identified across certain variables.

For example, the production volume and regular exports. This suggests that the production volume (size of the winery) plays a determinant role in enhancing chances of exporting. Other variables such as the type of company and the brand name were identified as having a strong linkage with export performance. However, it was suggested that the age of a firm has a strong linkage with exporting activities but in the observations this hypothesis was rejected for La Côte producers.

3) Barrier perceptions & motivation

The more the producers perceive the barriers as important, the less inclined to export they are. The paper rejects this hypothesis as regular exporters perceive the barriers as more important, more constraining to export than non-exporters. External barriers linked to the environment where the wineries evolve are perceived as more constraining than internal factors of the wineries. Factor such as Swiss wine image and the lack of support from Swiss wine institutions are considered as the main barriers to export. Nevertheless, high production and complex logistic are also to be taken into consideration. Despite, high barrier perception, some wineries can export but in relative small quantity and value. The paper suggested that the motivations to export play also an important role as a determinant for export. Therefore, exporters that are driven by the business development and increase of brand equity are more successful. The success was measured according to the proxies for export performance, (table 2).

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4) Lavaux export consortium

The export consortium is certainly one of the best solution to increase export. First of all, producers can share their experience and gain knowledge, which allow them to reduce their barrier perception. Secondly, logistic which was a considered as a main barrier by La Côte producers. Logistic issues could be reduced as a consortium allows orders grouping, less bureaucracy and better understanding of the foreign market. Moreover, it would have been of great interest to have pursued further interviews with Lavaux producers to better understand the effect of the export consortium on their export performance.

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Appendix 1 Data summary

Variable code	v1	v2	v3	v4	v5	v6	v7	v8	v9	v10	v11
	id	name	Lacote	Creation	Denomination	Zipcode	Bio	Company	YearProduction	WhiteQuality	RedQuality
	1		1	1528	1	1185	0	0	3	3	1
	2		1	1806	1	1182	0	1	4	4	3
	3		1	1900	1	1195	0	0	3	2	1
	4		1	0	1	1110	0	0	1	1	1
	5		1	1924	5	1122	0	0	1	1	1
	6		1	1940	1	1268	0	0	3	1	2
	7		1	1952	5	1268	0	0	2	2	2
	8		1	1953	4	1266	0	0	5	3	2
	9		1	1954	5	1115	0	0	1	1	1
	10		1	1959	1	1112	0	0	3	2	1
	11		1	1980	5	1195	0	0	3	2	2
	12		1	1994	1	1268	1	0	5	4	3
	13		1	2006	1	1173	0	0	1	1	1
	14		1	1785	1	1180	0	0	3	4	1
	15		1	1987	1	1267	0	0	3	2	2
	16		1	2009	5	1173	0	1	7	6	2
	17		1	1979	5	1185	0	0	3	3	2
	18		1	1872	1	1291	0	0	2	1	2
	19		1	1983	1	1175	0	0	3	2	2
	20		1	0	5	1267	0	0	2	2	2
	21		1	1830	1	1162	0	0	3	2	2
	22		1	1982	1	1184	0	0	3	2	2
	23		1	0	1	1173	1	1	5	6	5

v12	v13	v14	v15	v16	v17	v18	v19	v20	v21
WhiteVintage	RedVintage	Blanc1Grandcru	BlancGrandcru	BlancAOC	BlancSuisse	Rouge1Grandcru	RougeGrandcru	RougeAOC	RougeSuisse
3	3	0	2	1	0	0	1	0	0
2	2	0	2	2	0	0	1	2	0
2	2	0	0	2	0	0	0	1	0
2	2	0	0	1	0	0	0	1	0
2	2	0	0	1	0	0	0	1	0
2	2	0	0	1	0	0	0	2	0
2	2	0	0	2	0	0	0	2	0
2	2	0	0	3	0	0	0	2	0
2	2	0	0	1	0	0	0	1	0
2	2	0	0	2	0	0	0	1	0
3	3	0	2	0	0	0	2	0	0
3	3	1	3	0	0	0	3	0	0
2	2	0	0	1	0	0	0	1	0
2	2	0	1	3	0	0	0	1	0
3	3	0	2	0	0	0	2	0	0
2	2	1	2	3	0	0	0	2	0
3	3	0	0	3	0	0	2	0	0
2	2	0	1	0	0	0	0	2	0
3	3	0	2	0	0	0	2	0	0
3	3	0	1	1	0	0	1	1	0
3	2	0	2	0	0	0	0	2	0
2	2	0	0	2	0	0	0	2	0
2	2	1	2	3	1	1	1	3	1

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

v22	v23	v24	v25	v26	v27	v28	v29	v30	v31	v32
Divers1Grandcru	DiversGrandcru	DiversAOC	DiversSuisse	Totalha	Rougeha	Blancha	SwissDistributionA	SwissDistributionB	WordofMouth	Website
0	0	0	0	2	2	4	1	2	1	0
0	0	1	0	4	4	5	1	3	1	1
0	0	1	0	4	4	5	1	3	1	1
0	0	1	0	1	1	1	1	0	1	1
0	0	0	0	1	1	1	1	0	0	0
0	0	1	0	2	4	2	1	0	1	1
0	0	0	0	2	2	3	1	3	1	1
0	0	1	0	5	4	6	1	3	1	1
0	0	1	0	1	1	1	1	0	1	0
0	0	1	0	2	3	2	1	3	1	1
0	0	2	0	2	3	3	1	2	0	1
0	0	0	0	5	4	6	3	4	0	0
0	0	0	0	1	1	2	1	3	1	0
0	0	1	0	3	2	5	1	2	1	1
0	0	0	0	3	2	3	1	3	1	0
0	0	1	0	5	5	6	1	4	1	1
0	1	0	0	3	2	4	1	2	0	0
0	0	0	0	2	3	3	1	0	1	1
0	1	0	0	3	3	4	1	3	1	1
0	0	1	0	3	1	2	1	2	1	1
0	0	0	0	3	4	4	1	3	1	1
0	0	0	0	2	3	4	1	3	1	0
1	0	0	0	4	4	5	1	3	1	0

v33	v34	v35	v36	v37	v38	v39	v40	v41	v42
WineFairs	Publications	WineTasting	SocialMedia	Restaurants	SupportFromSwissInstitutions	Export	InterestedExport	DevBusiness	RespondDemand
1	0	0	0	1	1	1	0	1	0
1	0	0	1	1	1	1	1	1	1
1	0	1	0	0	2	0	1	1	0
0	0	1	0	0	1	0	0	0	0
0	0	0	0	0	1	0	0	0	0
0	0	1	0	0	2	0	1	0	1
0	0	0	0	1	1	0	1	1	0
1	0	1	0	1	2	1	1	1	0
0	0	0	0	0	0	0	0	0	0
1	0	0	0	0	2	1	1	1	0
1	0	1	0	0	2	1	1	0	1
1	0	1	0	0	1	1	0	0	0
1	0	1	0	0	1	1	1	1	1
0	1	0	0	0	1	0	1	0	0
1	0	1	0	0	1	0	1	1	0
1	0	1	1	1	1	1	0	1	0
1	1	1	0	0	1	1	1	1	0
0	0	1	0	0	1	1	0	1	0
1	0	0	0	0	1	0	1	1	0
0	0	1	0	0	0	0	0	0	0
0	1	1	0	1	2	1	0	0	0
0	0	0	0	1	1	0	1	1	0
0	0	1	0	1	2	1	0	0	1

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

v43	v44	v45	v46	v47	v48	v49	v50
Diversification	SlowLocalConsumption	IncreaseBandEquity	ProductionCosts	ExchangeRate	SwissWineImage	Customs	ProductionVolume
1	0	1	4	4	3	3	2
1	0	1	3	2	2	3	2
0	0	0	1	2	3	3	1
0	0	0					
0	0	0					
0	0	0	4	4	3	1	3
1	0	1	4	3	3	4	3
0	1	1	4	2	1	3	2
0	0	0	0	0	0	0	0
0	0	0	3	2	4	4	4
1	0	0	3	3	2	2	3
1	1	1	4	3	4	1	4
0	0	0	1	1	1	2	1
1	1	0	3	4	4	4	3
0	1	0	4	2	2	4	2
1	0	1	1	3	4	3	2
0	0	0	2	2	4	4	2
0	0	1	2	2	3	3	2
0	0	0	4	0	0	4	0
0	0	0	0	0	0	0	0
0	1	0	4	3	4	2	3
0	0	0	4	3	3	3	3
0	0	1	3	3	4	2	3

v51	v52	v53	v54	v55	v56	v57	v58	v59
LogisticMarketing	Packaging	LackSupport	UncertaintyOrders	LinguisticBarrier	FindingPartners	LackPartnerTrust	Competition	TransportationCosts
3	4	4	3	2	4	3	3	4
3	3	3	3	3	3	2	2	3
3	3	3	1	3	2	2	2	3
2	2	2	2	1	1	1	2	2
3	3	4	3	3	3	2	3	4
4	4	2	2	2	3	3	4	1
0	0	0	0	0	0	0	0	0
3	3	4	2	2	4	2	3	2
3	2	3	4	3	3	3	4	3
1	1	3	1	1	3	1	4	1
1	1	1	1	2	3	2	2	2
4	4	4	4	3	4	4	3	4
3	3	3	3	4	4	2	3	3
4	2	4	2	3	4	4	2	3
3	2	2	3	2	4	3	2	2
4	4	4	3	4	4	3	3	2
0	0	0	0	0	4	0	0	0
0	0	0	0	0	0	0	0	0
4	2	2	3	1	3	3	2	2
3	3	4	2	3	3	3	3	3
2	2	2	2	1	1	1	1	3

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

v60	v61	v62	v63	v64	v65	v66	v67
ExportTax	LackFinancialResource	ExportAsia	InterestedExportAsia	LackConsumerInterest	CulturalDifferences	ComplexityLogistic	MarketingChanges
4	2	1	1	0	0	0	0
2	2	1	1	0	0	0	0
4	1	1	1	0	0	0	0
		0	0	0	0	0	0
		0	0	0	0	0	0
3	4	1	1	0	0	0	0
4	3	1	1	0	0	1	0
1	1	1	1	0	0	0	0
0	0	0	0	0	0	0	0
3	3	1	0	0	0	1	0
3	4	1	0	0	0	0	0
1	2	0	1	0	0	0	0
3	2	1	1	0	0	0	0
4	3	0	0	1	1	0	0
3	3	1	1	0	0	0	0
3	3	1	1	0	0	0	0
4	2	1	1	0	0	0	0
3	3	1	1	0	0	0	0
0	0	1	1	0	0	0	0
0	0	0	0	0	0	0	0
4	3	1	1	0	0	0	0
3	2	1	1	0	0	0	0
3	2	1	1	0	0	0	0

v68	v69	v70	v71	v72	v73	v74	v75	v76
LackSupportSwissWineInstitutions	Counterfake	Legislation	OtherReasons	DirectExport	IndirectExport	OtherExportMethod	SalesAgent	LocalDistributor
0	0	0	0	1	1	0	1	1
0	0	0	0	0	1	0	0	0
0	0	0	0	0	1	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
0	0	0	0	0	1	0	1	0
0	0	0	0	0	1	0	1	0
0	0	0	0	0	1	0	0	1
0	0	0	0	0	0	0	0	0
1	0	0	1	0	1	0	0	0
1	0	1	1	0	0	1	0	0
0	0	0	0	1	1	0	0	0
0	0	0	0	0	1	0	0	0
1	0	0	0	0	1	0	0	0
0	0	0	1	0	1	0	0	1
1	0	1	0	0	1	0	1	0
0	0	0	0	0	1	0	0	1
0	0	0	0	0	1	0	1	1
0	0	0	0	0	1	0	0	0
0	0	0	0	0	0	0	0	0
0	0	1	1	0	1	0	0	1
0	0	0	0	0	1	0	1	0
0	0	0	0	0	1	0	0	0

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

v77	v78	v79	v80	v81	v82	v83	v84	v85	v86
ForeignDistributor	ExportFormat	BottlePrice	IdealPrice	ConsistentExport	TimeExport	QuantityExport	ValueExport	ExportRegionA	ExportRegionB
0	2	1	2	1	3	1	1	1	5
1	2	1	2	1	2	1	1	6	2
1	2	2	1	0	0	0	0	0	0
0	2	1	1	0	0	0	0	0	0
0	2	1	1	0	0	0	0	0	0
0	2	3	1	0	0	0	0	0	0
0	2	2	1	0	0	0	0	0	0
0	2	2	1	1	1	1	1	7	0
0	0	0	0	0	0	0	0	0	0
1	2	2	2	0	0	0	0	0	0
0	2	2	1	0	0	0	0	0	0
1	2	2	1	1	3	1	1	1	0
1	2	2	3	0	0	0	0	0	0
1	2	1	1	0	0	0	0	0	0
0	2	2	1	0	0	0	0	0	0
1	2	1	2	1	3	2	1	1	0
0	2	2	1	1	1	1	1	1	7
1	2	2	1	0	0	0	0	0	0
1	2	2	1	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	2	2	1	0	0	0	0	0	0
0	2	2	1	0	0	0	0	0	0
1	2	2	1	1	2	1	1	2	7

v87	v88	v89	v90	v91	v92	v93	v94	v95	v96	v97
ExportCountryA	ExportCountryB	ExportCountryC	ExportCountryD	Grappe	Winemaking	Bottling	Labeling	Packing	Communication	Distribution
1	8	7	12	1	1	3	3	1	3	3
0	6	0	0	1	1	2	3	2	3	3
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	1	1	1	3	2	4	4
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
2	10	11	0	1	1	1	2	1	2	2
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	4	2	3	4	2	4	4
9	2	3	0	4	1	3	3	3	2	3
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
7	6	0	0	1	1	1	3	1	2	3

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

v98	v99	v100	v101	v102	v103	v104	v105	v106	v107
ChangeMarketingExport	PackingFormat	WineName	LabelDesign	Designation	Export1GC	ExportGC	ExportAOC	ExportSwiss	ExportOther
0	0	0	0	0	0	1	0	0	0
0	0	0	0	0	0	0	1	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	1	1	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	1	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
1	0	1	1	1	0	0	1	0	0
1	1	0	1	0	0	1	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	1	1	0	0

v108	v109	v110	v111	v112	v113	v114
ExportDesignationSwiss	ExportDesignationVaud	ExportDesignationLacote	ExportDesignationOther	OriginExportA	OriginExportB	OriginExportC
1	1	0	0	1185	0	0
0	1	0	0	1182	1166	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
1	0	0	0	1260	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	1	0	1268	1184	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	1	0	0	1170	1166	1180
0	1	0	0	1185	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	0	1	0	1173	1185	0

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

v115	v116	v117	v118	v119	v120	v121	v122	v123	v124
WineFairParticipation	WhichWineFairA	WhichWineFairB	ReasonWineFair	InternationalContest	Award	Ceps	MillesimeBIO	ChardonnayduMonde	Decanter
1	1	3	1	1	1	1	0	0	1
0	0	0	0	1	1	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	1	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
1	2	0	2	1	1	0	1	1	0
0	0	0	0	1	1	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
1	0	0	0	1	1	0	0	0	0
0	0	0	0	1	1	0	0	1	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	1	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0
1	1	0	2	1	1	0	0	0	0

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

v125	v126	v127	v128	v129	v130	v131	v132	v133	v134	v135
Vinalies	MondialChasselas	VineAdvocate	AverageA	AverageB	AverageC	GovSupport	LessBureaucracy	CommercialAgreements	TechSanitary	CreditAccess
1	0	0	0	1	1	4	4	4	4	3
0	0	0	0	0	1	4	3	3	2	1
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	3	3	3	4	3
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	4	3	4	2	2
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	1	4	1	2	1	1
0	1	0	0	1	0	1	1	1	1	1
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	3	4	3	4	4
0	0	0	0	0	0	4	2	4	3	1
0	0	0	0	1	0	3	4	4	2	2
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	3	2	3	3	2
0	0	1	0	0	1	3	3	2	3	2

v136
Consortiums
4
4
0
0
0
0
0
0
4
0
3
0
4
4
0
4
3
4
0
0
0
0
4
3

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

Appendix 2: Questionnaire



Rolaz Julien, étudiant en 3^{ème} année de Bachelor à la Haute Ecole de Gestion de Genève.

Projet de recherche :

« Comment les producteurs de vins de La Côte pourraient-ils pénétrer le marché premium du vin dans les pays asiatiques où la consommation de vin augmente ? »

Objectif de la recherche :

Dans le cadre de mes études en International Business Management à la Haute Ecole de Gestion de Genève, je souhaite répondre au projet de recherche ci-dessus pour l'obtention de mon Bachelor.

A l'heure actuelle la plupart des producteurs de vin de la région de La Côte vendent leurs vins en Suisse. Par ailleurs les exportations de vin suisses correspondent seulement à 2% du volume totale des ventes. Ce niveau faible d'exportation peut être en partie expliqué par les coûts de productions élevés et également par la saturation du marché européen.

Cependant, les producteurs de La Côte pourraient être capable de rivaliser dans le marché premium des vins face à des nations comme la France, Italie, l'Espagne, le Portugal ou plus récemment l'Argentine et ce principalement dans les marchés émergents et principalement dans un marché comme la Chine qui est le principal partenaire commercial de la Suisse en Asie. La Chine, le Japon sont également des pays qui importent beaucoup de produits hauts de gammes à haute valeur ajoutée.

Malgré que le terroir et le climat soient favorable à la production de vin de qualité, la demande en Suisse ne cesse de diminuer ce qui n'incite pas à la production de vin haute gamme. De plus la relative petite taille du marché suisse ainsi qu'un faible contrôle des importations ne favorisent pas les producteurs Suisses. Ces raisons poussent à croire que l'exportation vers des marchés à forte croissance peut devenir une réelle source de demande qui peut justifier la production de vin de meilleure qualité dans la région de La Côte.

Cependant, entrer dans un nouveau marché requiert souvent des changements dans la production du produit et de son marketing. Rarement les stratégies de vente dans le marché domestique sont les mêmes pour l'exportations. Les premières compagnies à pénétrer un nouveau marché font généralement face à des coûts importants lié à ces changements de stratégies. Cependant elles créent des opportunités pour les prochaines compagnies qui souhaitent entrer dans le marché.

Les avantages de pénétrer un nouveau marché en premier ne sont que très rarement bénéfique pour le pionnier. Par conséquent diverses méthodes telles que des partenariats, des mesures collectives, des subsides à l'exportation et les consortiums permettent de réduire les externalités liées à l'exportation.

Consentement de participation à la recherche

Ce travail de recherche a pour objectif principal de déterminer quels sont les challenges et les opportunités que les producteurs de la Côte font face, principalement lors d'exportations dans les marchés asiatiques où la consommation de biens à haute valeur ajoutée ne cesse d'augmenter.

La publication des résultats sera en anglais, suite aux exigences académiques de mon programme. Les personnes intéressées voulant obtenir des informations en français peuvent me contacter par e-mail ou par téléphone.

Engagement du participant

Sur la base des informations qui précèdent, je confirme mon accord pour participer à la recherche
« Comment les producteurs de vins de La Côte pourraient-ils pénétrer le marché premium du vin dans les pays asiatiques où la consommation de vin augmente ? » et j'autorise :

- L'utilisation de mes données **anonymisées** à des fins scientifiques et la publication des résultats de la recherche dans des revues ou livre scientifique. Etant entendu que les données resteront anonymes lors de la publication des résultats aucune information sur l'identité de mon exploitation et moi-même ne seront données. Oui ☐ Non ☐

J'ai choisi volontairement de participer à cette recherche. J'ai été informé-e du fait que je peux me retirer en tout temps sans fournir de justifications et que je peux, le cas échéant, demander la destruction des données me concernant.

Chaque participant peut obtenir par e-mail la publication de la recherche. Voulez-vous obtenir la publication de la recherche ? Oui ☐ Non ☐

Si Oui ☐, veuillez écrire votre adresse e-mail

Prénom / Nom	Date	Signature

Durée du projet :

La récolte de données s'entend du 01.12.2017 au 15.03.2018. Les résultats seront publiés lors du rendu final à la date du 19.06.2018.

Personne de contact :

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E-mail : Julien.Rolaz@etu.hesge.ch

Etude de marché viticulture, la Côte

Première partie

Etude de marché des exploitations viticoles dans la région lémanique et plus précisément dans le canton de Vaud, région la Côte. L'objectif de ce questionnaire est d'évaluer différents facteurs des exploitations viticoles afin d'évaluer leurs importances lors de l'exportation. Pour ce questionnaire je vous prie de bien vouloir cocher une à plusieurs cases par réponse, selon la question, ainsi que de remplir manuscritement ou électroniquement les questions à développement. Les informations récoltées seront uniquement utilisées pour des recherches académiques.

Votre exploitation est-elle bien dans la région de La Côte oui ☐ non ☐

Dénomination de l'exploitation :

- Domaine ☐
Clos ☐
Abbaye ☐
Château ☐
Nom cadastral ☐

Année de création :

Adresse complète :

Nom de l'exploitation:

Production Bio Suisse : oui ☐ ou non ☐

Type de société :

- | | | | |
|-----------------------------------|--------------------------|------------------------------|--------------------------|
| Société anonyme | <input type="checkbox"/> | SàRL | <input type="checkbox"/> |
| Société en commandite par actions | <input type="checkbox"/> | Société simple | <input type="checkbox"/> |
| Société en nom collectif | <input type="checkbox"/> | Société en commandite simple | <input type="checkbox"/> |
| Société coopérative | <input type="checkbox"/> | | |

Quel est votre volume total de production par année ?

- Moins de 25'000L ☐
25'000L à 50'000L ☐
50'000L à 100'000L ☐
100'000 à 150'000L ☐
150'000L à 200'000L ☐
200'000 à 250'000L ☐
Plus de 250'000L ☐

Si possible, pouvez-vous détailler votre volume de production dans les tableaux suivants ?

Production annuelle en litre :

Volume	Moins de 20'000L	Entre 20'000L et 50'000L	Plus de 50'000L
Vin blanc 1 ^{er} Grand Cru	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vin blanc Grand Cru	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vin blanc AOC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vin blanc Vin Suisse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Volume	Moins de 20'000L	Entre 20'000L et 50'000L	Plus de 50'000L
Vin rouge 1 ^{er} Grand Cru	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vin rouge Grand Cru	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vin rouge AOC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vin rouge Vin Suisse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Volume	Moins de 20'000L	Entre 20'000L et 50'000L	Plus de 50'000L
Divers 1 ^{er} Grand Cru	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Divers Grand Cru	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Divers AOC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Divers Vin Suisse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Surface en ha de votre exploitation :

1 à 5 ha ☐ 5 à 10 ha ☐ 10 à 15 ha ☐ 15 à 20 ha ☐ plus de 20ha ☐

Surface en ha par catégorie de cépages :

Rouge : moins de 1 ha ☐ 1 à 3 ha ☐ 3 à 5 ha ☐ 5 à 8 ha ☐ 8 à 15 ha ☐ plus de 15 ha ☐

Blanc : moins de 1ha ☐ 1 à 3 ha ☐ 3 à 5 ha ☐ 5 à 8 ha ☐ 8 à 15 ha ☐ plus de 15 ha ☐

Quels sont vos deux principaux moyens de distribution en Suisse ?

- Vente en directe ☐ Autres ☐
 Distributeurs / revendeurs ☐
 Restaurants ☐
 Les grandes surfaces ☐

Quels sont vos trois moyens de promotions principaux en Suisse ?

- Le bouche à oreille ☐ Votre caveau de dégustation ☐
 Votre site internet ☐ Les réseaux sociaux ☐
 Les foires ou autres manifestations ☐ Les restaurants ☐
 Publications diverses ☐

Obtenez-vous du soutien de la part des instances du vin suisse pour la promotion de vos vins en Suisse ?

- Jamais / peu ☐
 Raisonnablement ☐
 Beaucoup ☐
 Enormément ☐

Avez-vous déjà exporté du vin ?

Oui ☐ Non ☐

Si non ☒, seriez-vous intéressé à exporter votre vin ?

Oui ☐ Non ☐

Pour quelles raisons exportez, exporteriez-vous votre vin ?

- Développer mon exploitation ☐
 Répondre à une demande ☐
 Diversifier mes activités ☐
 Suite à une baisse de la consommation locale ☐
 Augmenter votre image de marque ☐

Comment ces facteurs affectent-ils la possibilité d'exporter vos vins ?

Échelle de graduation : 1 = Pas important, 2 = Peu important, 3 = Important, 4 = Très important

	1	2	3	4
Coûts de production en Suisse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Les taux de change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L'image du vin suisse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Déclarations de douanes et autres formalités	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Votre volume de production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adapter la logistique et le marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Le packaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Le manque de soutien des instances du vin suisse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L'incertitude de commandes régulières	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
La barrière de la langue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trouver des partenaires commerciaux	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manque de confiance avec les partenaires commerciaux	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
La concurrence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coûts du transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taxes d'exportation et taxes d'importation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manque de ressources financières	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Pensez-vous que les marchés asiatiques comme la Chine, Singapour, le Japon ou Hong Kong sont des marchés intéressants pour exporter du vin de la Côte?

Oui ☐ Non ☐

Seriez-vous intéressé à exporter votre vin dans ces marchés ?

Oui ☐ Non ☐

Si « non » pour quelles raisons principalement ? (3 réponses max)

- Manque d'intérêt des consommateurs ☐
- La différence culturelle et de langue ☐
- La complexité de la logistique ☐
- La modification du marketing ☐
- Le manque de soutien de la part des instances du vin Suisse ☐
- Le risque de contre façon ☐
- Législation et taxe locale ☐
- Autres ☐ *Veillez les mentionner dans la zone de texte ci-dessous*

Zone de texte :

Quelles méthodes utilisez, utiliseriez-vous pour vos exportations ?

- Exportation directe (vente par internet, sur salon, appel d'offre) ☐
- Exportation indirecte (entreprise de distribution, agent, représentant) ☐
- Autres ☐ *Veillez les mentionner dans la zone de texte ci-dessous*

Zone de texte :

Quels types d'intermédiaires utilisez, utiliseriez-vous ? Ne pas répondre si « exportation directe ☒ »

- Agents et représentants ☐
Entreprise de distribution ☐
Distributeurs étrangers ☐

Sous quelle forme exportez, exporteriez-vous votre vin ?

Vrac ☐ Bouteille ☐

Quel est, serait l'échelle de prix à laquelle vous exportez, exporteriez-vous votre vin ?
(Prix sortis de cave par bouteille)

- Moins de 10 CHF ☐
10CHF à 20CHF ☐
20CHF à 30CHF ☐
30CHF à 40CHF ☐
Plus de 40CHF ☐

Quel serait le prix de vente idéal dans le pays importateur ?

- Moins de trois fois la valeur d'achat ☐
Trois à cinq fois la valeur d'achat ☐
Plus de cinq fois la valeur d'achat ☐

Etude de marché viticulture, la Côte

Deuxième partie

La deuxième partie s'adresse aux exploitations exportant du vin de façon régulière. Les informations récoltées seront uniquement utilisées pour des recherches académiques.

Depuis combien d'années exportez-vous du vin ?

- 1 à 5 ans ☐
5 à 10 ans ☐
Plus de 10 ans ☐

A combien de pourcent de votre totale de production évaluez-vous la quantité de vos exportations ?

- 1% à 5% ☐
 5% à 15% ☐
 15% à 30% ☐
 30% à 50% ☐
 Plus de 50% ☐

A combien de pourcent de votre totale de vente évaluez-vous la valeur de vos exportations ?

- 1% à 5% ☐
 5% à 15% ☐
 15% à 30% ☐
 30% à 50% ☐
 Plus de 50% ☐

Quelles sont les deux régions ou pays principaux de vos exportations ?

Veillez mentionner les pays dans la zone de texte ci-dessous.

- Union Européenne ☐
 USA / Canada ☐
 Reste de l'Amérique ☐
 Afrique ☐
 Europe (non Union Européenne),
 Russie incluse ☐
 Moyen Orient ☐
 Asie ☐
 Autres ☐

Zone de texte : Veuillez nomer les 3 pays principaux de vos exportations.

Quels sont les éléments de la chaîne de valeur que vous avez dû modifier afin d'exporter votre vin et quel est leur degré d'importance ?

Échelle de graduation : 1 = Pas important, 2 = Peu important, 3 = Important, 4 = Très important

	1	2	3	4
Variété de cépage / quantité	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modifier la vinification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
La mise en bouteille	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L'étiquetage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L'emballage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
La communication et promotion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
La distribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Adaptez-vous le marketing de vos produits pour les exportations ?

Oui ☐ Non ☐

Si oui, de quelles façons ?

Format de l'emballage ☐ Design de l'étiquette ☐

Nom du vin ☐ Appellation ☐

Zone de texte :

Autres ☐ *Veillez-les mentionner dans la zone de texte ci-dessous*

Quelles sont les mentions de crus sous lesquelles vous exportez votre vin ?

Plusieurs réponses possibles

1^{er} Grand Cru ☐

Grand Cru ☐

AOC ☐

Vin suisse ☐

Autres ☐ *Veillez-les mentionner dans la zone de texte ci-dessous.*

Zone de texte :

Quelle est, quelles sont les appellations de vos vins exportés ?

Vin Suisse ☐

Vin Vaudois ☐

Vin de La Côte ☐

Autres ☐ *Veillez-les mentionner dans la zone de texte ci-dessous.*

Zone de texte :

Quel est, quels sont les 3 principaux lieux d'origines de vos vins exportés ?

Tartegin ☐ Perroy ☐ Aubonne ☐

Féchy ☐ Mont-sur-Rolle ☐ Morges ☐

Nyon ☐ Luins ☐ Vinzel ☐

Begins ☐ Bursinel ☐ Coteau de Vincy ☐

Participez-vous à des foires internationales du vin ?

Oui ☐ Non ☐

Si « oui » laquelle ou lesquelles ? *Veillez-la ou les mentionner dans la zone de texte ci-dessous*

Zone de texte :

Si « oui » ou « non » pour quelles raisons ? *Veillez les mentionner dans la zone de texte ci-dessous*

Zone de texte :

Soumettez-vous vos vins à des concours internationaux ?

Oui ☐ Non ☐

Avez-vous déjà obtenu des prix couronnant la qualité de vos vins lors de concours internationaux ?

Oui ☐ Non ☐

Si « oui », quel(s) concours ?

Zone de texte :

Si « oui », quelles sont les notes moyennes obtenues ?

Moins de 80 points sur 100 ☐

80 à 90 points sur 100 ☐

Plus de 90 points sur 100 ☐

Selon vous, quelles sont les mesures qui pourraient favoriser la possibilité d'exportation pour des petits et moyen producteurs de vin ? Veuillez les évaluer en fonction de l'échelle de graduation suivante.

Échelle de graduation : 1 = Pas important, 2 = Peu important, 3 = Important, 4 = Très important

	1	2	3	4
Support gouvernemental, subsides.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Réduire la bureaucratie liée à l'exportation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accords commerciaux pour réduire les barrières tarifaires et non-tarifaires.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Augmenter l'aide gouvernementale pour répondre aux exigences techniques et sanitaires à l'exportation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Faciliter l'accès aux crédits.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Créer des consortiums d'exportations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Je tiens à vous remercier pour le temps que vous avez dédié à répondre à ce questionnaire. Je souhaite vous rappeler que les informations récoltées seront utilisées uniquement pour des recherches académiques qui consistent à élaboration de mon travail de Bachelor, en aucun cas vos informations seront identifiables par les lecteurs. Merci de votre confiance.

Appendix 3: Glossary of the Questionnaire & Data

Name & Id

Name means nom de l'exploitation and id corresponds to the number given to each winery.

Lacote

Lacote means Votre exploitation est-elle bien dans la région de la Côte

1 = Yes / 0 = No

Creation

Creation means année de création

Ex : 1955

Denomination

Denomination means dénomination de l'exploitation

1 = Domaine

2 = Clos

3 = Abbaye

4 = Château

5 = nom cadastral

ZIPcode

NPA du domaine

Bio

Production BIO Suisse

1 = Yes / No = 0

Company

Company means type de société

1 = société anonyme

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

2 = Société en commandite par action

3 = Société en nom collectif

4 = Société coopérative

5= Sàrl

6= Société Simple

7 = Société en commandite simple

YearProduction

YearProduction means Quel est votre volume total de production par année ?

1 = Moins de 25'000L

2 = 25'000L à 50'000L

3 = 50'000L à 100'000L

4 = 100'000 à 150'000L

5 = 150'000L à 200'000L

6 = 200'000 à 250'000L

7 = Plus de 250'000L

Blanc1GrandCru

Blanc1GrandCru means production annuelle en litre de Vin Blanc 1^{er} Grand Cru

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

BlancGrandCru

BlancGrandCru means production annuelle en litre de Vin Blanc Grand Cru

1 = Moins de 20'000L

What are the factors limiting La Côte wine producers to export?

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2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

BlancAOC

BlancAOC means production annuelle en litre Vin Blanc AOC

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

BlancSuisse

BlancSuisse means production annuelle Vin Blanc Suisse

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

Rouge1GrandCru

Rouge1GrandCru means production annuelle Vin Rouge 1^{er} Grand Cru

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

RougeGrandCru

RougeGrandCru means production annuelle Vin Rouge Grand Cru

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

RougeAOC

RougeAOC means production annuelle Vin Rouge AOC

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

3 = Plus de 50'000L

RougeSuisse

RougeSuisse means production annuelle Vin Rouge Suisse

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

Divers1GrandCru

Divers1GrandCru means production annuelle Vin Divers 1^{er} Grand Cru

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

DiversGrandCru

DiversGrandCru means production annuelle Vin Divers Grand Cru

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

DiversAOC

DiversAOC means production annuelle Vin Divers AOC

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

DiversSuisse

DiversSuisse means production annuelle Vin Divers Suisse

1 = Moins de 20'000L

2 = Entre 20'000L et 50'000L

3 = Plus de 50'000L

What are the factors limiting La Côte wine producers to export?

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Totalha

Totalha means surface en ha de votre exploitation

1 = 1 à 5 ha

2 = 5 à 10 ha

3 = 10 à 15 ha

4 = 15 à 20 ha

5 = plus de 20ha

Rougeha

Rougeha means surface en ha exploitée pour la production de vin rouge

1 = moins de 1ha

2 = 1 à 3 ha

3 = 3 à 5ha

4 = 5 à 8 ha

5 = 8 à 15 ha

6 = plus de 15 ha

Blancha

Blancha means surface en ha exploitée pour la production de vin blanc

1 = moins de 1ha

2 = 1 à 3 ha

3 = 3 à 5ha

4 = 5 à 8 ha

5 = 8 à 15 ha

6 = plus de 15 ha

SwissDistributionA

SwissDistributionA means Quel est votre principal moyen de distribution en Suisse ?

1 = Vente en directe

What are the factors limiting La Côte wine producers to export?

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2 = Distributeurs / revendeurs

3 = Restaurants

4 = Les grandes surfaces

5 = Autres

SwissDistributionB

SwissDistributionB means Quel est votre second moyens de distribution en Suisse ?

1 = Vente en directe

2 = Distributeurs / revendeurs

3 = Restaurants

4 = Les grandes surfaces

5 = Autres

Quels sont vos trois moyens de promotions principaux en Suisse ?

WordofMouth = Le bouche à oreille

WineTasting = Votre caveau de dégustation

Website = Votre site internet

SocialMedia = Les réseaux sociaux

WineFairs = Les foires ou autres manifestations

Restaurants = Les restaurants

Publications = Publications diverses

SupportFromSwissWineInstitutions

Obtenez-vous du soutien de la part des instances du vin suisse pour la promotion de vos vins en Suisse ?

1 = Jamais / peu

2 = Raisonnablement

3 = Beaucoup

What are the factors limiting La Côte wine producers to export?

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4 = Enormément

Export

Avez-vous déjà exporté du vin ?

1 = Oui / 0 = Non

InterestedExport

Si non ☐, seriez-vous intéressé à exporter votre vin ?

1 = Oui / 0 = Non

Pour quelles raisons exportez, exporteriez-vous votre vin ?

DevBusiness = Développer mon exploitation

RespondDemand = Répondre à une demande

Diversification = Diversifier mes activités

SlowLocalConsumption = Suite à une baisse de la consommation locale

IncreaseBrandEquity = Augmenter votre image de marque

Comment ces facteurs affectent-ils la possibilité d'exporter vos vins ?

ProductionCosts = Coûts de production en Suisse

ExchangeRate = Les taux de change

SwissWineImage = L'image du vin suisse

Customs = Déclarations de douanes et autres formalités

ProductionVolume = Votre volume de production

LogisticMarketing = Adapter la logistique et le marketing

Packaging = Le packaging

LackSupport = Le manque de soutien des instances du vin suisse

What are the factors limiting La Côte wine producers to export?

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UncertaintyOrders = L'incertitude de commandes régulières

LinguisticBarrier = La barrière de la langue

FindingPartners = Trouver des partenaires commerciaux

LackPartnerTrust = Manque de confiance avec les partenaires commerciaux

Competition = La concurrence

TransportationCosts = Coûts du transport

ExportTax = Taxes d'exportation et taxes d'importation

LackFinancialResource = Manque de ressources financières

1 = Pas important

2 = Peu important

3 = Important

4 = Très important

ExportAsia

ExportAsia means Pensez-vous que les marchés asiatiques comme la Chine, Singapour, le Japon ou Hong Kong sont des marchés intéressants pour exporter du vin de la Côte?

1 = oui / 0 = Non

InterestedExportAsia

InterestedExportAsia means Seriez-vous intéressé à exporter votre vin dans ces marchés ?

1 = oui / 0 = Non

Si « non » pour quelles raisons principalement ?

LackConsumerInterest = Manque d'intérêt des consommateurs

What are the factors limiting La Côte wine producers to export?

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CulturalDifferences = La différence culturelle et de langue

ComplexityLogistic = La complexité de la logistique

MarketingChanges = La modification du marketing

LackSupportSwissWineInstitutions = Le manque de soutien de la part des instances du vin Suisse

Counterfake = Le risque de contre façon

Legislation = Législation et taxe locale

OtherReasons = Autres

Quelles méthodes utilisez, utiliseriez-vous pour vos exportations ?

DirectExport = Méthode d'exportation directe

IndirectExport = Méthode d'exportation indirecte

OtherExportMethod = Autres méthodes d'exportations

Quels types d'intermédiaires utilisez, utiliseriez-vous ?

SalesAgent = Agents et représentants

LocalDistributor = Entreprise de distribution

ForeignDistributor = Distributeurs étrangers

ExportFormat

ExportFormat means Sous quelle forme exportez, exporteriez-vous votre vin ?

1 = Vrac

2 = Bouteille

ExportPrice

What are the factors limiting La Côte wine producers to export?

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ExportPrice means Quel est, serait l'échelle de prix à laquelle vous exportez, exporteriez-votre vin ?

1 = Moins de 10 CHF

2 = 10CHF à 20CHF

3 = 20CHF à 30CHF

4 = 30CHF à 40CHF

5 = Plus de 40CHF

IdealPrice

IdealPrice means Quel serait le prix de vente idéal dans le pays importateur ?

1 = Moins de trois fois la valeur d'achat

2 = Trois à cinq fois la valeur d'achat

3 = Plus de cinq fois la valeur d'achat

Part two :

TimeExport

TimeExport means Depuis combien d'années exportez-vous du vin ?

1 = 1 à 5 ans

2 = 5 à 10 ans

3 = Plus de 10 ans

QuantityExport

QuantityExport means A combien de pourcent de votre totale de production évaluez-vous la quantité de vos exportations ?

1 = 1% à 5%

What are the factors limiting La Côte wine producers to export?

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2 = 5% à 15%

3 = 15% à 30%

4 = 30% à 50%

5 = Plus de 50%

ValueExport

ValueExport means A combien de pourcent de votre totale de vente évaluez-vous la valeur de vos exportations ?

1 = 1% à 5%

2 = 5% à 15%

3 = 15% à 30%

4 = 30% à 50%

5 = Plus de 50%

Quelles sont les deux régions ou pays principaux de vos exportations ?

ExportRegionA = region 1

ExportRegionB = region 2

1 = Union Européenne

2 = USA / Canada

3 = Reste de l'Amérique

4 = Afrique

5 = Europe (non Union Européenne), Russie inclue

6 = Moyen Orient

7 = Asie

8 = Autres

ExportCountryA = pays 1

ExportCountryB = pays 2

What are the factors limiting La Côte wine producers to export?

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ExportCountryC = pays 3

1 = UK

2 = Germany

3 = France

4 = Spain

5 = Italy

6 = Canada

7 = Japan

8 = Honk-Kong

9 = China

10 = Nederlands

11 = Luxembourg

12 = Brazil

Quels sont les éléments de la chaîne de valeur que vous avez dû modifier afin d'exporter votre vin et quel est leur degré d'importance ?

Grappe = Variété de cépage / quantité

WineMaking = Modifier la vinification

Bottling = La mise en bouteille

Labeling = L'étiquetage

Packing = L'emballage

Communication = La communication et promotion

Distribution = La distribution

1 = Pas important

2 = Peu important

3 = Important

What are the factors limiting La Côte wine producers to export?

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4 = Très important

ChangeMarketingExport

ChangeMarketingExport means Adaptez-vous le marketing de vos produits pour les exportations ?

1 = oui / 0 = non

Si oui, de quelles façons ?

PackingFormat = Format de l'emballage

LabelDesign = Design de l'étiquette

WineName = Nom du vin

Designation = Appellation

Quelles sont les mentions de crus sous lesquelles vous exportez votre vin ?

Export1GC = 1^{er} Grand Cru

ExportGC = Grand Cru

ExportAOC = AOC

ExportSwiss = Vin suisse

ExportOther = Autres

Quelle est, quelles sont les appellations de vos vins exportés ?

ExportDesignationSwiss = Vin Suisse

ExportDesignationVaud = Vin Vaudois

ExportDesignationLacote = Vin de La Côte

ExportDesignationOther = Autres

Quel est, quels sont les 3 principaux lieux d'origines de vos vins exportés ?

What are the factors limiting La Côte wine producers to export?

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OriginExportA = lieu d'origine 1

OriginExportB = lieu d'origine 2

OriginExportC = lieu d'origine 3

1 = Tartegin 1180

2 = Perroy 1166

3 = Aubonnem 1170

4 = Féchy 1173

5 = Mont-sur-Rolle 1185

6 = Morges 1110

7 = Nyon 1260

8 = Luins 1184

9 = Vinzel 1184

10 = Begins 1268

11 = Bursinel 1195

12 = Coteau de Vincy 1182

WineFairParticipation

WineFairParticipation means Participez-vous à des foires internationales du vin ?

1 = oui / 0 = Non

WhichWineFairA = foire internationale 1

WhichWineFairB = foire internationale 2

WhichWineFairC = foire internationale 3

1 = Prowein

2 = BioFach

3 = London wine fair

4 =

What are the factors limiting La Côte wine producers to export?

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ReasonWineFair

Si « oui » ou « non » pour quelles raisons ?

1 = challenge

2 = networking

InternationalContest

InternationalContest means Soumettez-vous vos vins à des concours internationaux ?

1 = oui / 0 = non

Award

Award means Avez-vous déjà obtenu des prix couronnant la qualité de vos vins lors de concours internationaux ?

1 = oui / 0 = non

Si « oui », quel(s) concours ?

7Ceps = concours 7 ceps

Decanter = concours Decanter

Vinalies = concours vinalies

ChardonayduMonde = Chardonay du Monde, France

MillesimeBio = Millésime BIO

VineAdvocate = Vine Advocate

Si « oui », quelles sont les notes moyennes obtenues ?

AverageA = Moins de 80 points sur 100

Average B = 80 à 90 points sur 100

Average C = Plus de 90 points sur 100

Selon vous, quelles sont les mesures qui pourraient favoriser la possibilité d'exportation pour des petits et moyens producteurs de vin ?

What are the factors limiting La Côte wine producers to export?

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GovSupport = Support gouvernemental, subsides.

LessBureaucracy = Réduire la bureaucratie liée à l'exportation.

CommercialAgreements = Accords commerciaux pour réduire les barrières tarifaires et non-tarifaires.

TechSanitary = Augmenter l'aide gouvernementale pour répondre aux exigences techniques et sanitaires à l'exportation.

CreditAccess = Faciliter l'accès aux crédits

Consortiums = Créer des consortiums d'exportations.

1 = Pas important

2 = Peu important

3 = Important

4 = Très important

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

Appendix 4: Mean of variables for barrier perception

. mean ProductionCosts ExchangeRate SwissWineImage Customs ProductionVolume LogisticMarketing Packaging LackSupport UncertaintyOrders FindingPar > tners LinguisticBarrier LackPartnerTrust Competition TransportationCosts ExportTax LackFinancialResource				
Mean estimation	Number of obs = 21			
	Mean	Std. Err.	[95% Conf. Interval]	
ProductionCosts	2.761905	.307871	2.119697	3.404113
ExchangeRate	2.285714	.2685309	1.725569	2.84586
SwissWineImage	2.571429	.3129843	1.918555	3.224302
Customs	2.619048	.2801036	2.034762	3.203334
ProductionVolume	2.142857	.2608203	1.598796	2.686919
LogisticMarketing	2.52381	.2977619	1.902689	3.14493
Packaging	2.285714	.2857143	1.689725	2.881704
LackSupport	2.571429	.3052823	1.934621	3.208236
UncertaintyOrders	2.095238	.2664114	1.539514	2.650963
FindingPartners	2.857143	.2869023	2.258675	3.455611
LinguisticBarrier	2.047619	.2714703	1.481342	2.613896
LackPartnerTrust	2.095238	.2664114	1.539514	2.650963
Competition	2.285714	.2685309	1.725569	2.84586
TransportationCosts	2.238095	.2752035	1.664031	2.81216
ExportTax	2.619048	.3045386	1.983791	3.254304
LackFinancialResource	2.142857	.2608203	1.598796	2.686919

. mean ProductionCosts ExchangeRate SwissWineImage Customs ProductionVolume LogisticMarketing Packaging LackSupport UncertaintyOrders FindingPar > tners LinguisticBarrier LackPartnerTrust Competition TransportationCosts ExportTax LackFinancialResource if ConsistentExport ==0				
Mean estimation	Number of obs = 14			
	Mean	Std. Err.	[95% Conf. Interval]	
ProductionCosts	2.642857	.4141341	1.748175	3.53754
ExchangeRate	2.071429	.3700948	1.271887	2.87097
SwissWineImage	2.285714	.3981906	1.425476	3.145953
Customs	2.571429	.3882093	1.732753	3.410104
ProductionVolume	2	.3631365	1.215491	2.784509
LogisticMarketing	2.357143	.400647	1.491598	3.222688
Packaging	2.142857	.375882	1.330813	2.954901
LackSupport	2.428571	.4285714	1.502699	3.354444
UncertaintyOrders	2	.3779645	1.183457	2.816543
FindingPartners	2.714286	.3841441	1.884393	3.544179
LinguisticBarrier	2.071429	.3846546	1.240433	2.902424
LackPartnerTrust	1.928571	.3391049	1.19598	2.661163
Competition	2.142857	.3454117	1.39664	2.889074
TransportationCosts	2.142857	.3609685	1.363032	2.922682
ExportTax	2.642857	.400647	1.777312	3.508402
LackFinancialResource	2.214286	.3805515	1.392154	3.036417

What are the factors limiting La Côte wine producers to export?

Julien Rolaz

```
. mean ProductionCosts ExchangeRate SwissWineImage Customs ProductionVolume LogisticMarketing Packaging LackSupport UncertaintyOrders FindingPar
> tners LinguisticBarrier LackPartnerTrust Competition TransportationCosts ExportTax LackFinancialResource if ConsistentExport ==1
```


Mean estimation Number of obs = 7

	Mean	Std. Err.	[95% Conf. Interval]	
ProductionCosts	3	.4364358	1.93208	4.06792
ExchangeRate	2.714286	.2857143	2.015168	3.413403
SwissWineImage	3.142857	.4592215	2.019183	4.266532
Customs	2.714286	.3595159	1.834582	3.593989
ProductionVolume	2.428571	.2973809	1.700907	3.156236
LogisticMarketing	2.857143	.404061	1.868441	3.845845
Packaging	2.571429	.4285714	1.522752	3.620105
LackSupport	2.857143	.340068	2.025026	3.689259
UncertaintyOrders	2.285714	.2857143	1.586597	2.984832
FindingPartners	3.142857	.404061	2.154155	4.131559
LinguisticBarrier	2	.3086067	1.244867	2.755133
LackPartnerTrust	2.428571	.4285714	1.379895	3.477248
Competition	2.571429	.4285714	1.522752	3.620105
TransportationCosts	2.428571	.4285714	1.379895	3.477248
ExportTax	2.571429	.4809288	1.394638	3.748219
LackFinancialResource	2	.2182179	1.46604	2.53396

What are the factors limiting La Côte wine producers to export?

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Appendix 5: Demand for quality control attestation



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Département fédéral de l'économie,
de la formation et de la recherche DEFR

Office fédéral de l'agriculture OFAG
Secteur Produits végétaux

Exportation de vin / Demande d'attestation de contrôle de la qualité

Base légale: Ordonnance de l'OFAG du 7 décembre 1998 concernant le contrôle des moûts de raisin, jus de raisin et vins destinés à l'exportation (RS 916.145.211)

Informations sur le/la requérant/e

Société, organisation

* Nom

* Prénom

* Rue, n°

* NPA* Lieu

* Courriel

* Téléphone

Commentaire

Données concernant le vin

* Pays de provenance du (des) vin(s)

S'il s'agit de vin(s) étranger(s),
l'importation a eu lieu ☐ en fûts ☐ en bouteilles

Le(s) vin(s) est (sont) actuellement ☐ en fûts ☐ en bouteilles

* Pays de destination
Particulièrement s'il s'agit du Québec.

Le(s) vin(s) sera (seront) exporté(s) ☐ en fûts ☐ en bouteilles

Date prévue de l'exportation

Appellation du vin	Millésime	Cépage	Rapport d'analyse no.**	envoyé à Agroscope
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

* Champs obligatoires

** Veuillez compléter cette rubrique si le vin en question a déjà été exporté et pour lequel l'analyse d'Agroscope est encore valable (12 mois de validité).

1/2

What are the factors limiting La Côte wine producers to export?

Julien Rolaz



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Département fédéral de l'économie,
de la formation et de la recherche DEFR
Office fédéral de l'agriculture OFAG
Secteur Produits végétaux

Analyses souhaitées

coûts en francs

Analyse standard pour le contrôle de la qualité de moûts et jus de raisin

180.00

paramètres analysés

1. densité,
2. extrait sec total,
3. acidité totale,
4. acidité volatile,
5. acidité citrique
6. anhydride sulfureux total

Analyse standard pour le contrôle de la qualité de vins et moûts de raisin partiellement fermentés

250.00

paramètres analysés

1. titre alcoométrique volumique total,
2. titre alcoométrique volumique acquis,
3. extrait sec total,
4. acidité totale,
5. acidité volatile,
6. acidité citrique,
7. anhydride sulfureux total,

Analyses supplémentaires

- acide sorbique et natamycine (CLHP-SM)
- cendres, gravimétrie
- fer et cuivre (photométrie)
- levures et bactéries lactiques (détermination microbiologique)
- méthanol (GC)
- chlorures et sulfates (photométrie)
- autres analyses

150.00

80.00

50.00

80.00

80.00

50.00

Selon travail
effectif

En cas d'analyse, 2 bouteilles d'au moins 50 cl par vin sont à envoyer à:

Agroscope
Laboratoire des vins à l'exportation
Route de Duillier 50
CP 1012
1260 Nyon

Contacts:
OFAG

exportations.vins@blw.admin.ch
Doris Boehlen (Tél. 058 463 02 06)
Monica Caloz (Tél. 058 463 02 05)

Agroscope
exportations.vins@agroscope.admin.ch
Danielle Nardone (Tél. 058 466 79 77)
www.vin.ofag.admin.ch

Envoi direct par Courriel

What are the factors limiting La Côte wine producers to export?

Julien Rolaz