# THE SMALL WINEGROWERS OF THE LOIRE VALLEY ON THE INTERNATIONAL MARKET


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# PREFACE

As part of my study programme, European Engineer Degree International Agribusiness, at the University of Applied Sciences Aeres in Dronten, I had to carry out a research project related to my studies. This thesis was carried out during my four-month internship in France on a wine export platform.

This report is the final proof of my study programme. My interests focused on the market, in particular the wine market, and on the attitude of importers towards this product. To stimulate my future career in the wine sector, I decided to choose this subject for my thesis.

The subject of this thesis was chosen based on my passion for wine, but also in relation to the export management programme and courses. In addition, I decided to analyse the situation of winegrowers in my home region, the Loire, since my father is a winegrower in Anjou. The aim of my thesis is to help small winegrowers in the Loire to develop their export sales. My internship is a real asset because it allowed me to be in direct contact with importers.

The research did not go as initially planned; chapter 2 is modified in relation to the Research Proposal Plan.

I would like to thank all the people involved in this project for their help and advice, Ms Sintija Kuipers as my thesis supervisor and the professionals in the sector.

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# SUMMARY


With French domestic consumption declining for more than 10 years, small winegrowers need to look beyond the French market to ensure the development of small wineries. However, the Loire region is unable to export, as only 20% of production is exported. Moreover, the small winegrowers of the Loire cannot manage to export their production. Based on data collected during several interviews, research is studying solutions for developing export sales by small winegrowers in the Val de Loire. The aim of the research is to provide solutions for small Loire winegrowers so that they can succeed in exporting. Exporters from the United States, the United Kingdom, Belgium, China, Switzerland and small winegrowers in the Val de Loire have been mobilised for this research. Three main results are reported.

How can small Loire winegrowers develop their export sales? Three main subjects were studied. Firstly, the place of French wines in an importer's product portfolio. Secondly, the researcher wanted to identify the key factors for success in exporting. Finally, the research focused on solutions to the problems faced by small Loire winegrowers.

First of all, France occupies first place in importers' product portfolios. For Loire wines, they are behind Burgundy and the Rhône Valley, two important French wine-producing regions.

Secondly, the key points for export success are the quality/price ratio of the wine, the appellation of the wine and the volumes available. In addition, winegrowers must work with importers on marketing, product quality control, export procedures and market visits. Importers expect regularity in the price and quality of the wine. Finally, research shows that there is no standard profile for exporting a wine. It is the needs of the market that define the wines to be imported. But there are criteria which can stimulate sales, such as advertising around the wine, packaging and organic wines.

Thirdly, the research proposes several solutions to develop export sales for small Loire winegrowers. First, producers need to define their export strategy according to the wines they offer. Producers can also become independent on export sales. To do this, the winegrowers must implement human and financial means by immersing themselves in the international market, by training in the export process and by offering marketing support to importers through active communication. In the long term, the creation of an export platform is a way to enter the export market. It brings together several winegrowers under a single identity, thus accelerating the process of internationalisation of small businesses. Otherwise, winegrowers must invest in a competent sales department to meet the demands of importers.

# 1 INTRODUCTION

Vines are among the oldest plants on earth, present long before mankind. The "invention" of wine is undoubtedly due to chance. Its history began 8000 years ago when wild vines were brought back and domesticated by chance by the Egyptians. Solutions were found to limit the fermentation of the grape and men began to produce, store, consume and trade wine all over the world (Tattersall, 2015).

It is produced from the fruit of the vitis vinifera, whose juice ferments naturally. Drink has become a cultural phenomenon that is part of the evolution of social and dietary behaviour (Coutier, 2002). The new approach to wine involves a new public of tasters, with a wide range of profiles, from professional specialists (oenologists, expert tasters) to simple amateurs. Tasting is the result of a moment of sharing where gustatory impressions are not an objective reality but the result of a subjective analysis (Coutier, 2002).

## 1.1 International wine market

The wine market is becoming more international: 15 years ago, 25% of the wine produced was exported. Today, this share has risen to 43%, according to the International Organisation of Vine and Wine (OIV, 2019).

In 2019, world wine consumption was 241 million hectolitres and 31 billion euros in value (OIV, 2019). It can be observed that 10 countries consume 70% of the volumes produced globally. France is in second place, behind the United States, with 3.5 billion bottles consumed (CNIV, 2019). As shown in Figure 1, world wine consumption has been stable for several years and there has been a slight increase in recent years (Ugaglia, 2019).

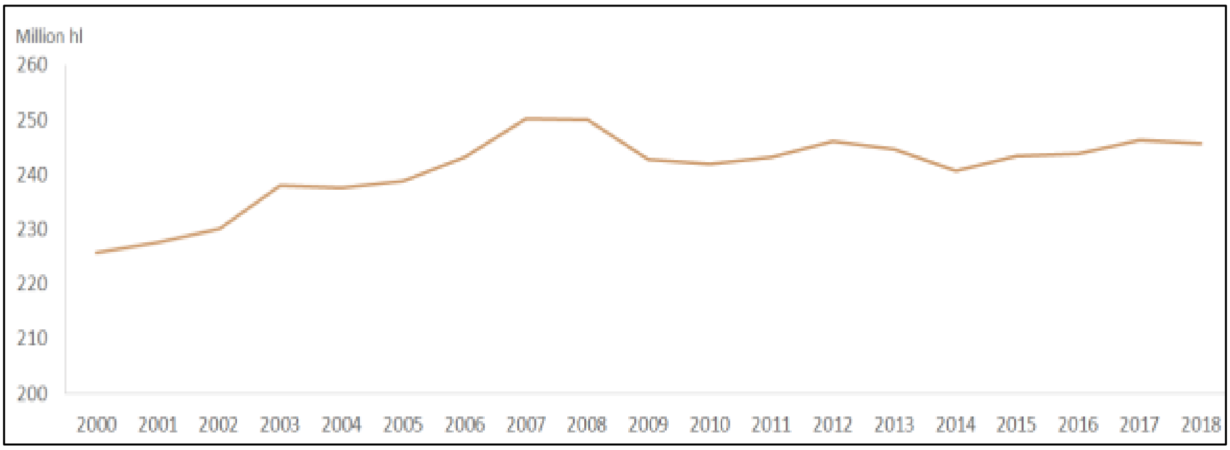


*Figure 1 : Evolution of world wine consumption (Wine, 2019)*

The wine market is driven by growing demand due to constant product improvement through innovation and more advanced distribution networks worldwide. As shown in Figure 2, thanks to steady growth in export volumes, the international wine market is growing every year. In 15 years, international trade has increased by 75% in volume and doubled in value (Pomarici, 2016).

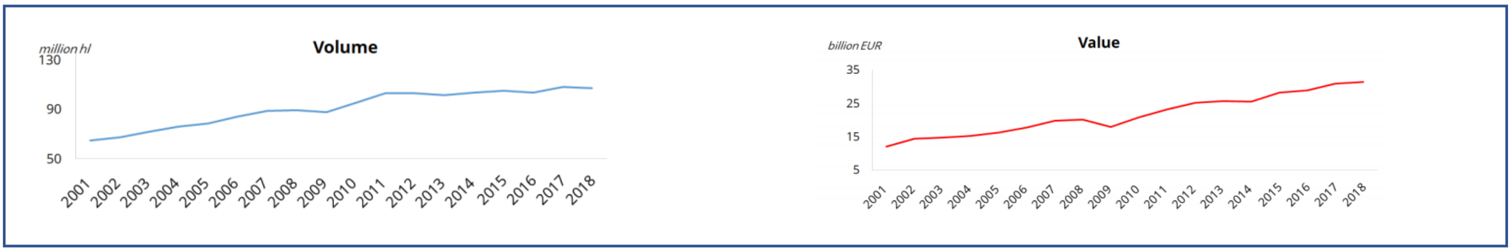


*Figure 2 : Evolution of wine trade (Wine, 2019)*

Purchasing trends have changed over the years. Demand for sparkling wines is increasing, with an annual growth rate of 7% in value and 6% in volume in 2018 (Wine, 2019). The same trend can be observed for bulk wine with a growth rate of 3% in volume and 5% in value. This has an impact on the bottle market where shares are decreasing, since the annual growth rate is 5% in value but only 1% in volume in annual rate (Jubenot, 2014).

As illustrated in Figure 3, Europe and North America, historical wine markets, are dynamic in the market. Asia-Pacific is also a larger wine market, with rapid growth in recent years. The increase in demand for top-of-the-range wines and the westernization of consumption are growth factors that make it one of the new main players in the world wine market. (Vividmaps, 2019).

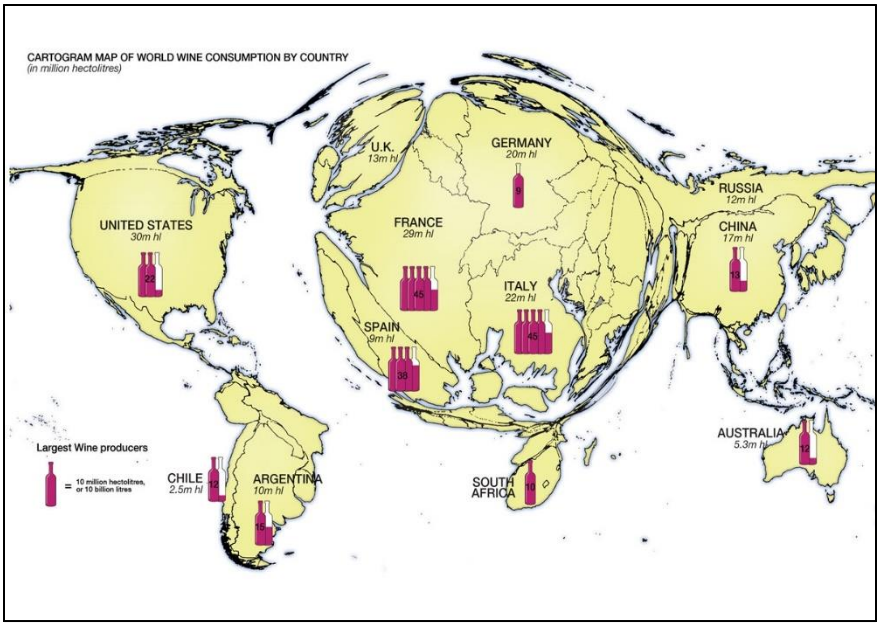


*Figure 3 : World wine consumption by Country (Vividmaps, 2019)*

As Figure 4 shows, Europe remains the world's leading wine producer, accounting for 60% of world production. With 48.6 million hectolitres produced, France remains in the top three alongside Italy with 54.8 million hectolitres, and Spain with 44.4 million hectolitres of wine produced (Hermes, 2019).

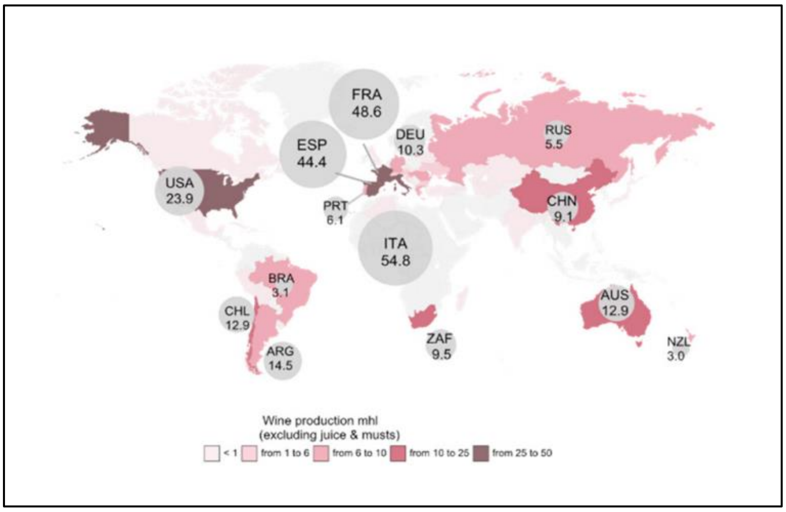


*Figure 4 : World Wine production (OIV, 2019)*

However, according to "Wine Economics and Policy", the European Union continues to reduce its market share in overall trade, while Chile and especially New Zealand show a fair increase in their performance (Correia, 2019). This can be explained by the preferential trade agreements signed in important markets. In addition, some suppliers have a better understanding of the needs of consumers and distributors (Pomarici, 2016).

Finally, world wine production is greater than world consumption, which puts negative pressure on prices. But this remains to be qualified since the situation is very different according to the wine-producing regions, with notable differences between the evolution of prices in historical wine-producing regions (Napa, Bordeaux, Rhone Valley, Burgundy, Barolo, etc.) compared to regions that lack international reputation (Lodi, Languedoc, Romania, etc.) (Marianne, 2019).

The world market is expected to grow at an annual rate of 5.8% over the period 2020-2025 (Pomarici, 2016).

## 1.2 French Wine Market

Located in Western Europe, France is one of the oldest countries in the world, and its influence extends throughout the world (Insider, 2020). As part of the European Union, France is considered the 3rd largest country in Europe with more than 551,695 km² (PopulationDAta, 2020). The country has more than ten major metropolises, making it the 6th largest economy in the world (Societegenerale, 2020).

Agriculture covers more than half of France's surface area. The wine industry is present in 66 of the 96 French departments, with 750,000 hectares of vines. France represents 11% of the world's vineyard surface area (LARVF, 2019). The French wine industry is established in a dozen specialised regions. These regions have a strong identity, and each has its own management policy (Ugaglia, 2019). For each region of production, there is an Interprofessional Wine Council in charge mainly of marketing and communication. The marketing and communication department is dedicated to the promotion of wines in France and abroad. It designs and distributes messages to help market the wine and contributes to the development of wine exports. However, depending on the region, the interprofessional councils are not equally effective, particularly in terms of the assistance they provide on the export market (Ugaglia, 2019).

In 2019, France produced 4.2 billion litres of wine, i.e. 17% of world production. It is the 2nd largest wine producer in the world behind Italy in terms of volume (OIV, 2019).

France is the 2nd wine consuming country in the world behind the United States. As Figure 5 shows, French consumption has been falling for 30 years, while production has fluctuated but has remained stable (Ugaglia, 2019). In 1975, a Frenchman consumed 100 litres of wine per year, whereas today a Frenchman consumes 40 litres. The trend is to consume less wine but of better quality (CNIV, 2019).

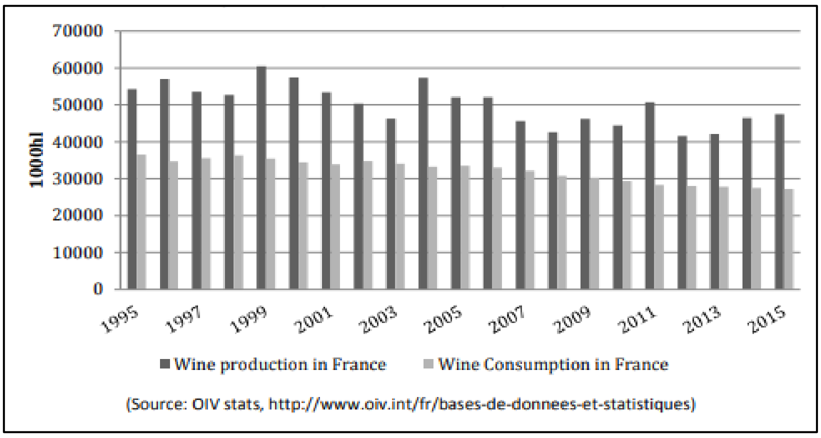


*Figure 5 : Wine production and consumption in France*

In France, for every 10 bottles consumed, 5 bottles are bought in supermarkets, 3 in restaurants, 1 will be sold at the winery and 1 by a wine merchant or online. The e-commerce circuit is expanding rapidly, with an estimated turnover of 500 million euros in 2019 (CNIV, 2019).

### 1.2.1 Small winegrower vs Big winegrower

In France, there are currently 85,000 wineries, among which three different profiles of winegrowers can be identified (CNIV, 2019). Merchants, who buy the grapes or unfermented grape juice to transform it into wine and sell it under their own brand name. There are also cooperatives, which are groups of winegrowers from the same production area who produce wines from the combined harvests of the different members (Ugaglia, 2019). These two profiles are quite close since volume comes before quality, even if good wines can be found in the cooperatives and wine merchants. Finally, there are the independent winegrowers, who work their grapes, their wine, and their marketing independently of the wine merchants or cooperatives. These winegrowers make the reputation of French wines, they are present in all the prestigious appellations of the French vineyard (Ugaglia, 2019).

In France, small and large vineyards are distinguished according to two factors, the volume produced by the winegrower and the geographical indication of the wine. These two factors are independent, there is no link between the two.

As shown in Figure 6, 55% of the volumes produced are vinified by private wineries. 37% of the production is processed by winemaking cooperatives. The remaining 8% of the total grape harvest is sold as fresh grapes, grape juice or must (Ugaglia, 2019). There is an imbalance in the volumes of wine produced on the French market. Indeed, cooperatives produce 37% of French production, whereas the number of cooperatives is only 1500, or 2% of French winegrowers. Cooperatives are very important structures and are among the big winegrowers on the French market. As illustrated in Table 1, on average a cooperative produce around 30,000 hectolitres of wine per year, compared to 1,000 hectolitres for independent winegrowers. In terms of volume produced, the big French winegrowers are mainly the cooperative cellars, which produce 30 times more than a classic winegrower. Wine cooperatives are typically French structures where their weight is important in France to the detriment of small winegrowers. (Viticole, 2015).

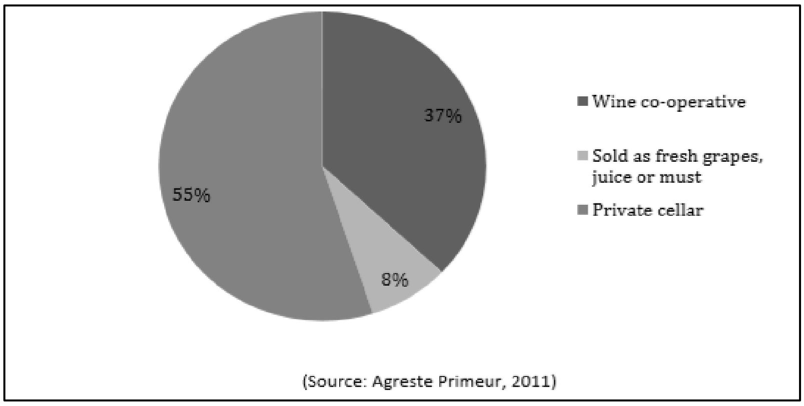


*Figure 6 : Winemaking processing in France*

*Table 1 : Comparison of the small and big French winegrower (CNIV, 2019)*

| By quantity (Wines without famous appellations) | | | |
|---|---|---|---|
| | Average number of hectares per winery | Average number of hectolitres produced per winery | Percentage of total production |
| Small Winery *Independent winegrowers* | 9 Hectares[1] | 513 Hectolitres[2] | 55% of production for 88% of producers |
| Big winery *Cooperative cellar, Wine merchant* | 375 Hectares | 30 000 Hectolitres | 37% of production for 2% of producers |

The consequences for the small independent winegrower are multiple. Small wineries are tempted to join cooperatives (Point, 2018). In 2018, 53% of wineries sent their grapes (partially or totally) to a wine cooperative. The cooperatives continue to increase their production, which is the result of even higher volumes favouring low costs and therefore attractive prices on the national and international market. Today, cooperatives market more than 60.5% of French wines and are represented in all wine-growing regions. Cooperatives continue to take market share at the expense of the know-how of independent French winegrowers. As a result, small winegrowers are first competing on the French market and then lagging on the export market (Point, 2018).

Quality is often unobservable, or if it is observable, it is not verifiable. This is particularly true in the wine sector, where only the appellation can unknowingly certify the quality of a product (Heber, 2020). To know the level of quality of a wine, a classification system has been created. There are two main categories of wine. There is the wines Without Geographical Indication. The legislation for these wines is the most liberal of all the other wine categories. And the Geographical Indications, which are divided into three sub-levels of quality:

Protected Geographical Indications (PGI): the legislation is more flexible than that for Protected Designation of Origin (PDO) wines, and in particular leaves more freedom in the choice of grape varieties. There are 74 PGI on the French vineyard (INAO, 2018).

Protected designation of origin (PDO): this is the strictest category in terms of how the wines are made, legislation relating to viticulture (grape variety, yield). It is theoretically the most qualitative category. In France, there are 375 PDO (INAO, 2018).

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*Source : (CNIV, 2019)*

[1] 750 000 ha in France / 85 000 French Producers $\simeq$ 9Ha

[2] 9Ha x 57 Hl (average yield per Hectare in France) = 513 Hectolitres

The "Crus", which designate the highest level of quality in the wine. The classification of Crus is specific to the wine region. Thus, only certain wine regions have Crus. In order to classify the Crus, they are numbered from Grand Cru for the best wines, to 1er Cru, 2nd Cru, etc. Today, there are 51 Crus in France (INAO, 2018).

French wines have an ancient and great reputation based on these appellations which are geographical indications, notably PDO and PGI. PDO wines have been very successful in France and abroad for a long time and foreigners, especially Chinese, have been taking them away (Ugaglia, 2019).

As explained in Table 2, there are three prestigious wine-growing regions in France, Bordeaux, Burgundy, and the Champagne region, to which are attached great appellations and chateaux. The great wine estates are experiencing a revival of interest (Gaudiaut, 2020). According to the latest data, the average value of a hectare of vines under the "Bourgogne Grand Cru" appellation exceeded 6 million euros last year. In second place is a subdivision of the Bordeaux vineyard, the "Pauillac" appellation, where the average value of a hectare of vines is more than 2 million euros (Gaudiaut, 2020). Overall, the vines of Burgundy, Bordeaux and Champagne are the most expensive in France. Thanks to the fame of their appellations, producers are very important players in the French wine market, regardless of the profile of the producer. Indeed, these wines are highly sought-after at the national and international level where sales are easy for all winegrowers to make. Unlike cooperatives, the production volumes are lower (OIV, 2019). Thus, as shown in table 2, the average price of a bottle of Bordeaux, Champagne or Burgundy wine is 25€, whereas the average price of a bottle of wine from other regions is 4€. The winegrowers of these regions are among the major winegrowers on the French market thanks to the fame and quality of their appellations (OIV, 2019). Finally, the reputation of certain winegrowers has been built around the Cru vineyards. In France, a large winegrower can have small volumes but a large appellation with the mention "Cru". This characteristic automatically places the winegrower among the great winegrowers in France when production volumes are low (Echos, 2019). The mention is a sales argument and very reputable in the market that demand is stronger than supply. Only the prestigious regions have this label, namely Burgundy, Champagne and Bordeaux.

*Table 2 : Comparison of the small and big French winegrowers (Gaudiaut, 2020)*

| **By the quality** | | | |
|---|---|---|---|
| | Price per hectare of the appellation | Average price of a bottle | Cru |
| Small Winery<br>*Winegrowers from other wine regions* | Less than 30 000€ per hectare | Between 1€ and 20€. | No Cru |
| Big winery :<br>*Winegrowers of Champagne Bordeaux Burgundy* | More than 30,000€ per hectare | Between 20€ and 3000€. | Several « Cru » |

During a research work at a world wine fair, the group of researchers proved that the appellation of origin of wine will be one of the most important criteria on the international market (Heber, 2020). In these wine-growing regions, all the producers export in view of the reputation of the wines. Champagne is the star product of exports since it represents half of France's export sales (Jubenot, 2014). It continues to outstrip all its competitors with 3.1 billion euros of bottles sold throughout the world (BusinessFrance, 2018). Behind champagne, there are Bordeaux and Burgundy, which devote more than half of their production for export, i.e. a total turnover of around 3 billion euros in 2018 (France, 2019). These wines are very much in demand for export and all the winegrowers, both independent and wine merchant, export an average of 50% of their production (BusinessFrance, 2018).

Small French wineries from prestigious appellations are also supported by international organisations. The European Union protects agricultural products of excellent quality, because it believes that a reputation for high quality can help European producers not only to preserve their cultural identity, but also to become more profitable and competitive in a rapidly expanding global market (Heber, 2020).

On the other hand, the Languedoc and the Loire, emblematic regions of French winegrowing, export less than a third of their production. 72% of the exports of these wines come from wine merchants. The small cellars are unable to export because of a low reputation of their appellations and a lack of means (Vin, 2018).

### *1.2.2 French wine export*

France remains the main market for French wines since 60% of the wines produced in France are consumed there (FEVS, 2018). However, in a context of globalisation, wine exports have doubled over the last fifteen years (CNIV, 2019). In 2019, French wine exports increased by 5.9%, driven by record harvests in terms of volume (Charbonnel, 2020).

Worldwide, France is the world's leading wine exporting country in terms of value, with a turnover of 13 billion euros, and the third largest in terms of volume, with 14.1 million hectolitres exported in 2019 (Statista, 2018; LARVF, 2019). Over the whole of 2019, the sector achieved a turnover of 14 billion euros, for 194.6 million cases of 12 bottles (+0.7%) shipped, this represents billions of bottles exported to more than 200 countries. As Figure 7 shows, the export trend is dynamic (France, 2019). Imports into France are very low. France imports very little foreign wine and exports ten times more than it imports in value (Ugaglia, 2019).

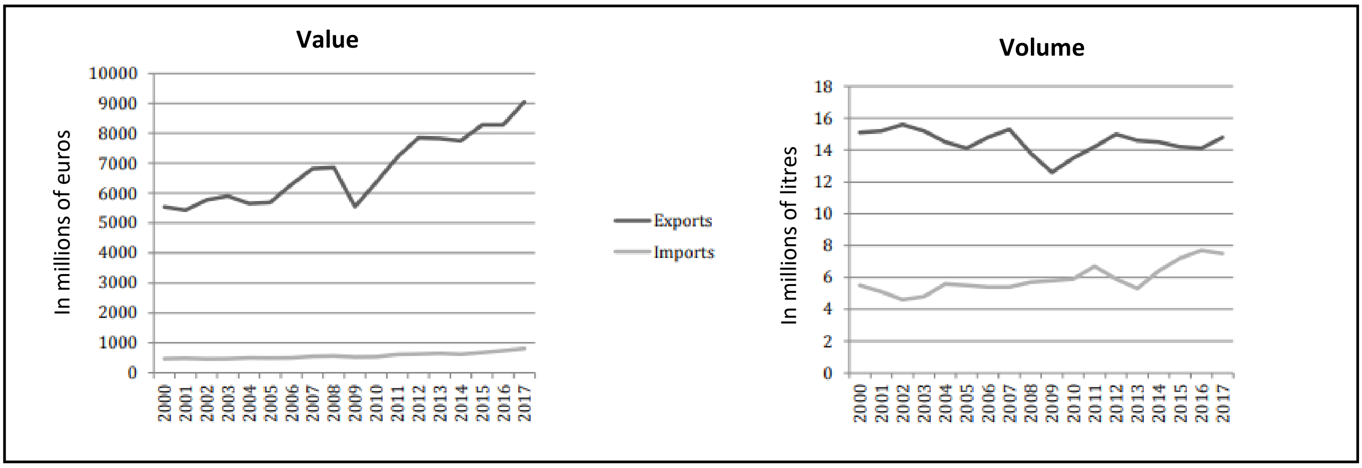


Figure 7 : French wine imports and exports (Wine, 2019)

Nevertheless, competition on the market is becoming more and more intense. Spain, for example, the largest vineyard in the world by surface area, has mainly bet on a strategy of volumes, shaking up the French market (Hermes, 2019). However French wine still delights foreign palates: in 2019, out of 100 euros spent worldwide to buy foreign wines, 30 euros went into the pockets of French exporters against only 19 euros for Italians (Parisien, 2019).

Cooperative merchants and cellars are the main players in French exports. On average, half of their production is devoted to export. Due to the volume that they produce each year, the wine merchants have at their disposal significant financial, human and material resources to be efficient on the international market (OIV, 2019).

According to an INSEE study, in France, only 32% of small and medium-sized enterprises export, compared to 85% of large companies according to the statistics organisation. Despite financial support from the French government, SMEs (Small Medium Enterprises) account for only 17% of French exports (Normand, 2018).

As shown in Figure 8, the United States is the largest market for French wine exports in the world in terms of value. The American market captured 18% of the total value of French wine sales abroad in 2018 (Gaudiaut, 2020). Behind the Americans, there are the United Kingdom and Germany with 13% and 8% of French exports in value. In terms of volume, the United States is in second place behind Germany, with 12% of the volume exported against 16%. The United States stands out from Germany and China as a traditional buyer of French top-of-the-range wines. Germany is a market for entry-level wines but with large volumes, whereas the United Kingdom is a more open market (Gaudiaut, 2020).

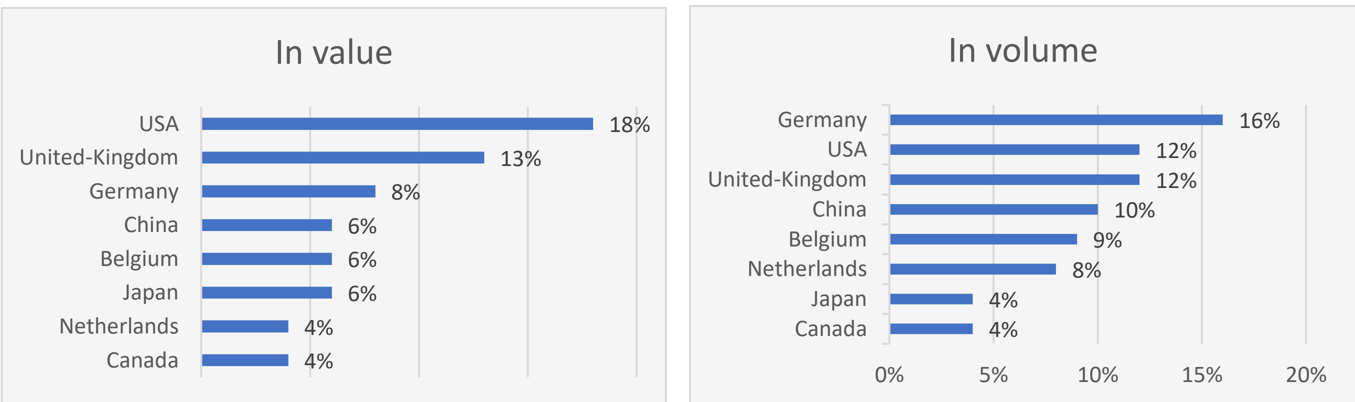


*Figure 8 : Export of French wines by country in 2018 (FranceAgrimer, 2019)*

The first method used by winegrowers is direct export, which consists of selling directly on the market you have chosen, using their resources first. Usually, once the winemaker has established a sales programme, they turn to agents and/or distributors to represent them further in that market. Agents and distributors work closely together and become the face of the company (Leeman, 2019).

Wineries can export via distributors. The last ones buy the wines and then sell them to end-users in another country at a mark-up that provides them with their profit margin. They handle all distribution, marketing and advertising furthermore they represent the company in all aspects of sales and service. Distributors may represent you on an exclusive or non-exclusive basis, which means that they may purchase and market similar products from your company  (Leeman, 2019).

Finally, indirect export via management and trading companies, the importers. This method is the most widely used in the wine sector. Importers buy the products directly and work on a commission basis. They are often specialised in the international market. They take care of market research, transport, and advertising. A very efficient method, yet the winemaker has less control over sales, brand management and building relationships with end customers (Hermes, 2019).

The French wine industry has lost its competitiveness in front of Italian and Spanish neighbours in recent years. The specialist council of the wine industry explains that "on the three main import markets of Germany, the United Kingdom and the United States, France has seen its position weaken to the benefit of its two main competitors in a context of growing trade" (Viticole, 2015).

There are several reasons for the drop in French wine exports. First, it was affected by the global health crisis linked to the Covid-19 epidemic, but also by American taxes and concerns about Brexit. A few months ago, the American administration confirmed the application of a 25% customs tax on French wines imported into the US due to the transatlantic trade dispute over Airbus and Boeing (Gaudiaut, 2020). This decision has had a strong impact on the American wine market, since wine exports to the United States have decreased by 40% in 2020 (LARVF, 2020).

On the international market, French wine exports fell by 18% between January and August 2020. The cause of this drop is directly linked to the Covid-19 crisis. Largely due to the almost simultaneous closure of restaurants in many countries around the world, where French wines hold a large share of the wine lists (AFP, 2020).

Finally, France's market share in volume terms has been steadily declining for several years (FranceAgrimer, 2015). The growth of French wines is due to high-end wines, such as the great growths of Bordeaux, Burgundy, and Champagne. Conversely, the volume of entry-level French wines is declining in the face of international competition. The other French wine-growing regions, that is responsible for this decline (Cassagnes, 2015).

### *1.2.3 Loire Valley Wine*

The Loire Valley is the heart of France, famous for its natural beauty, its magnificent castles and its wines (Valley, 2015). This French natural region is situated along the Loire, the longest river in France. The vineyards of the Loire Valley are the 3rd region of appellation wines in France, with 57,200 hectares of vines for a production of 2.1 million hectolitres per year. The production of the Loire Valley represents 11.9% of the French production (VinduValdeLoire, 2019). The Loire is compatible with 14% of Protected Designations of Origin, i.e., 52 PDOs and 11% of Protected Geographical Indications, i.e., 8 PGIs. As illustrated in Figure 9, there are four sub-regions : The Nantes region, Anjou-Saumur, Touraine, and the Centre.

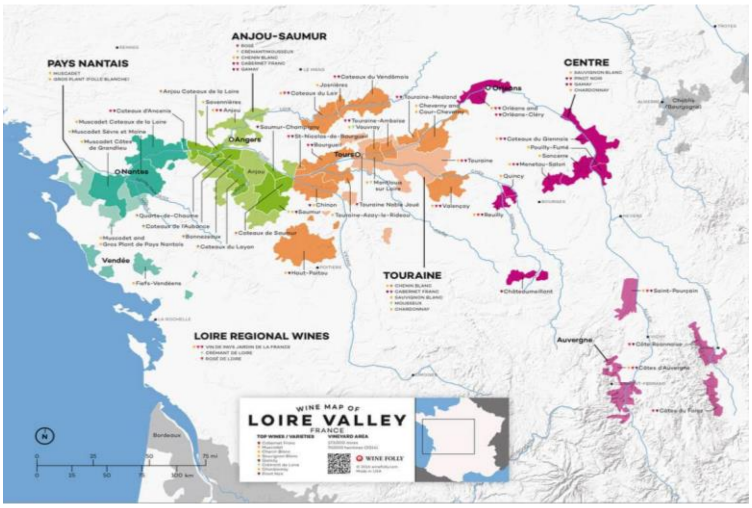

*Figure 9 : Loire Valley Map (Vins Val de Loire, 2020)*

In this region, there are three profiles of producers, 6,200 winegrowers, 250 trading houses and 16 cooperative cellars producing Loire Valley wines (Wines, 2020). The winegrowers of the Loire are facing a lack of awareness of their appellations. As Table 3 shows, the price of a hectare of vines in the Loire is among the lowest averages and the price has increased by only 1% in 10 years, i.e. €29300 per hectare. Prices in the Loire Valley show the difference in notoriety compared to its neighbours in Champagne and Burgundy, which are strong and famous export regions (Potevin, 2017).

*Table 3 : Vine price per hectare in France (Potevin, 2017)*

| | **Vine prices in 2016 (per hectare)** | **Vine prices in 2006 (per hectare)** | **Average annual price evolution (over 10 years)** |
|---|---|---|---|
| **Champagne** | 1 113 500 | 629 800 | 6% |
| **Burgundy** | 650 000 | 107 700 | 5% |
| **Loire Valley** | 29 300 | 25 400 | 1% |
| **Rhône Valley** | 43 400 | 34 100 | 2% |
| **Languedoc Rousillon** | 12 000 | 10 900 | 1% |
| **Bordeaux** | 103 100 | 64 500 | 5% |

However, the arrival of new winegrowers, participation in promotional events and adapted marketing strategies enable the Loire Valley winegrowers to face up to the competition.

In 2019, the Loire Valley exported a value of €305 million, i.e., only 23% of its total turnover of €1.3 billion (VinduValdeLoire, 2019). On the export market, the results are encouraging, since in five years sales of Loire wines have risen by more than 36% in terms of export value (Landre, 2019). But according to the president of the region's federation, "there is still a lot to be done.“. Indeed, the Loire is a long way from its neighbours in Bordeaux and Burgundy, where their exports generate a turnover of more than 3 billion euros (Echos, 2019).

The US market is the leading export market in terms of value for Loire Valley wines (Echos, 2019). And if in the past, the first export markets for Loire wines were located first in Great Britain, Benelux, and Germany, today the United States is the world's leading importer of Loire Valley wines. Thanks to the white wines, which have an extraordinary reputation (République, 2019).

The United Kingdom is also a dynamic market for Loire Valley wines. Over the last few years, exports have particularly accelerated with an increase of 36% in value and 41% in volume (Loire V. d., 2019).

On average, Loire winegrowers export only 20% of their production. Currently, 80% of the production is sold in France. The weaknesses of the Loire winegrowers are clearly identified according to the president of InterLoire. The small winegrowers of the Loire do not have the volumes to meet demand. After the two small harvests in 2016 and 2017, the volumes stoked are too low to position themselves on the international market. The president specifies that it is necessary to be able to regulate stocks to offer regular volumes on the market. And the president denounces the lack of financial, material, and human resources of the small Loire winegrowers to approach the new international markets with confidence.

What are the challenges of exporting for small Loire winegrowers?

Expanding a small winery involves exporting, both to take advantage of the growing demand from emerging markets and to keep in touch with the competition (CommissionEuropéenne, 2014). Exports are the engine of growth when the domestic market is shrinking as in France. According to a study carried out by researchers, exports improve monthly profits by 16 to 26% (Atkin, 2017).

Today, the small Loire winegrowers are facing several obstacles that prevent them from going into the export market. Firstly, the increasingly protectionist attitude of many third countries towards wine imports. But also, the difficulties related to the transport of goods within the EU Member States of the European Union. The administrative complexity of the customs documents to be provided for intra-community exports, with an authorisation procedure that can take up to three hours (Paul, 2017). This effectively prevents small producers from exporting their wines, as they simply cannot afford the time it takes to export, unlike large vineyards (EuropeanParliament, 2008).

According to current research, export is possible for small Loire winegrowers, but they face a lack of means. Exports will enable them to develop the reputation of their appellation and to respond to the crisis in the French market by developing their export sales.

This introduction reveals the problem of the small winegrowers of the Loire. That leads to the main research question: how can small Loire winegrowers increase their export sales?

The main question will provide an answer to improve the export situation of small Loire winegrowers.

To answer to the main research question, five sub-questions are defined:

- What is the position of French wine in the importer's product portfolio?
- What are the important points for importers when buying a wine?
- What can the small winegrowers do to ensure that the importer buys their wines?
- What are the export criteria according to the winegrower?
- According to the winegrowers, what are the solutions to increase export sales?

The main objective of this empirical study is to provide solutions for small Loire winegrowers to export their wines internationally. It is therefore aimed at importers and independent winegrowers in France and the Loire region.

# 2 MATERIALS AND METHOD

To help small winegrowers in the Loire, the researcher wanted to meet both sides of the market, i.e. importers and winegrowers in the Loire. On the one hand, the aim was to collect data to find out the criteria for export success. On the other hand, the researcher questioned the small winegrowers of the Loire to find out their position, their point of view and how they operate in relation to the export of their wines. The aim is to compare the responses from both sides with a view to finding solutions to help small Loire winegrowers export.

To answer the main question, the research focused on five sub-questions. A specific methodology was applied for each sub-question. The researcher relied on primary research, which was carried out using a qualitative method. It consisted of interviewing importers in the wine sector and small winegrowers in the Loire region. These interviews made it possible to bring together the opinions of both parties on the functioning and expectations of the international wine market and thus to find avenues of reflection for developing exports for the benefit of small Loire winegrowers who are unable to export.

Given the time allocated to the research, the researcher decided to interview nine importers and five winegrowers in the Loire region.

The wines of the Loire Valley are increasingly finding their place on foreign markets. To establish the scope of this research, the researcher chose to focus on the main export markets where Loire wines are beginning to establish themselves. The United States, the United Kingdom, China, Belgium, and Switzerland are the countries selected to carry out the research. They are the most attractive markets for Loire Valley wines[3].

In addition, this selection of markets was based on the fact that they are representative of the different continents. However, as the European continent is the main customer for Loire wines, three European markets were studied. The United States is the leading purchasing market for Loire wines in terms of value, which is why they were chosen. Finally, China was chosen as the last market to be studied for its purchasing potential and its third place for exports of Loire wines.

For the research, the researcher used the qualitative method. Qualitative methods are a set of methods in which the quantitative aspect is deliberately set aside to deepen the

[3] The selection was based on the volume and value of Loire wine imports.

analysis of the object of study. To this end, different techniques, based on the administration of open-ended questions and the exploration of language, are used (Saunders, 2019).

The researcher conducted several interviews in order to answer the main question. The interviews were conducted in two stages, i.e. sub-questions 1, 2 and 3 by interviewing the importers. Then sub-questions 4 and 5 by interviewing small winegrowers in the Loire region. The preparation of the interviews and questions can be found in appendixes 1 and 2.

The same questions were put to all importers and winegrowers. The interviews were conducted by the researcher and numbered so that they could be identified. According to the interviews, the researcher asked additional questions that are not mentioned in Appendixes 1 and 2. All the answers made it possible to answer the main question, which is intended to offer a solution for small Loire winegrowers to develop their export sales.

This primary research took place from 15 December 2020 to 8 January 2021. 14 interviews will provide food for thought for the small winegrowers of the Loire.

For importers, the interviews were conducted in three parts, namely sub-questions 1, then sub-questions 2, and finally sub-questions 3. The body of the interview and the questions can be found in Annex 1.

The interviews for the importers took place remotely. The data collected was easily processed since the interviews were either recorded by an application with the importers' consent or transcribed into English. The interviews with the importers can be found in Annex 3.

The interview was then divided into three parts represented by sub-questions 1, 2 and 3. To find the importers, the researcher used a network of professionals (Winemakers, business companies) as illustrated in the following table.

*Table 4 : The importers who were interviewed*

| Contact | Importer | Country | Method of interview |
|---|---|---|---|
| La Mano Wine Consult (Export platform) | M. Judy Xu | China | Script |
| Vini Be Good (Export platform) | ABS Wine | United-Kingdom | Voice recording |
| Benoit Amirault (Domaine Yannick Amirault) | Jon David Headrick | USA | Script |
| Internet research | Wine Access | USA | Script |
| Victor Lebreton (Domaine de Montgilet) | Thorman Hutt | United-Kingdom | Script |
| Vini Be Good (Export platform) | Avalon Wine | United-Kingdom | Voice recording |
| Vini Be Good | Ask me Wine | Belgium | Voice recording |

| | | | |
|---|---|---|---|
| (Export platform) | | | |
| Anthony Rassin<br>(Domaine les Pierres Ecrites) | Arthur Bisson (Suisse) | Switzerland | Voice recording |

## 2.1 Sub-question 1 : What is the position of French wine in the importer's product portfolio?

The aim of this sub-question was to determine whether French wines, and more particularly Loire wines, are well taken into account on the international market. The questions helped the researcher to position Loire wines in an importer's product portfolio and to find out what markets are available for the style of Loire wines. It also helped to find out which Loire Valley wines are imported today.

## 2.2 Sub-question 2 : What are the important points for importers when buying wine?

For this part of the interview, the questions focused on explaining the purchasing process of an importer. The researcher wanted to understand the method of wine selection and the essential criteria for an importer. The questions made it possible to prioritise the most important criteria according to the importer in order to be able to export wines internationally. The researcher also wanted to identify the expectations of importers, particularly when working with a winemaker. Finally, the questions also made it possible to find out which wine profiles are sought after on the global market. These details are the key points for proposing the most relevant answer to the main question.

## 2.3 Sub question 3 : What can the small winegrower do to get the importer to buy the wines?

The last part of the interview was freer for the importer with open questions. The importer was able to express his vision on exports and give his answers to the problems faced by small Loire winegrowers. The questions concerned the commercial operation of an importer with a small winegrower. The researcher wanted to know whether the importer worked with a small winery and how the collaboration with the winery was going. In other words, what are the export requirements for a small winegrower, but also the advantages and disadvantages of working with a small winery.

Finally, the last question was open-ended, as it concerned the solutions that an importer could propose to the problem of exports for small Loire winegrowers. These solutions will be very relevant because they will come from the importers, major players in the success of exports. Depending on the markets, the solutions will surely differ from one country to another, but also from one company to another, which guarantees an adapted solution.  This sub-question will provide a food for thought for the main question.

As shown in Table 5, questions 1 to 6 will be for sub-questions 1 and sub-questions 2 will be covered by questions 7 to 15 of the interview. Finally, questions 16 to 18 will be for sub-question 3.

*Table 5 : Interview questions by sub-questions*

| Sub Question | Interview questions |
|---|---|
| Sub question 1 | 1, 2, 3, 4, 5 |
| Sub question 2 | 6,7, 8, 9, 10, |
| Sub question 3 | 11, 12, 13 |

For the winegrowers, the interviews took place in physics. The data was processed easily since the interviews were recorded via an application with the agreement of the professionals.

The interviews began with a discovery phase between the researcher and the winegrower. The researcher wanted to find out how the winery and the export business worked as described in appendix 2. The researcher's objective was to set the framework for the interview, with the aim of inserting relevant additional questions. The interview would then take place in two parts, with sub-question 4 and sub-question 5. The body of the interview and the questions can be found in Appendix 2.

To find the winegrowers, the researcher relied on the network of Victor Lebreton, a Val de Loire winegrower. The winegrowers selected were identified as small winegrowers, i.e. wines from little-known appellations and a production that does not exceed the average for the Val de Loire, i.e. 1,500 hectolitres per year[4] . In order to obtain relevant results, the selection of winegrowers took into account the whole of the Loire Valley. The table below summarises the winegrowers who were selected by the researcher.

---

[4] For winegrower in the Loire Valley (according to Mr Lebreton; 2020, personal communication) :
Average surface area : 30Ha
Average annual production : 50 Hl / Ha
Average annual production by winegrower : 1 500 Hl

*Table 6 : The winegrowers who will be interviewed*

| Contact | Winegrower | Appellation, Country | Method of interview |
|---|---|---|---|
| Victor Lebreton (Domaine de Montgilet) | Domaine de la Fessardière | Muscadet, FRANCE | Voice recording |
| Victor Lebreton (Domaine de Montgilet) | Domaine Yannick Amirault | Bourgueil, FRANCE | Voice recording |
| Victor Lebreton (Domaine de Montgilet) | Domaine Ménard Gabaurit | Muscadet, FRANCE | Voice recording |
| Victor Lebreton (Domaine de Montgilet) | Domaine Champault | Menetou-salon, FRANCE | Voice recording |
| Victor Lebreton (Domaine de Montgilet) | Domaine Fabrice Gasnier | Chinon, FRANCE | Voice recording |

## 2.4 Sub question 4 : What are the criteria for exporting according to the winegrowers?

The main idea of this sub-question was to find out what the most important criteria for exporting are according to the winegrowers. The researcher wanted to find out the opinion of the winegrowers. The questions asked to the winegrowers were the same as those asked to the importer in order to be able to compare the answers. The questions made it possible to prioritise the most important criteria for exporting according to the winegrowers. The researcher wanted to know the winegrower's opinion on the purchasing process of an importer. All the answers made it possible to identify the key points for answering this sub-question.

## 2.5 Sub question 5 : According to the winegrowers, what are the solutions to increase export sales?

The second part of the interview was freer for the winegrower with open questions. First of all, the researcher wanted to know how the small winegrowers of the Loire region export today. The questions concerned the methods used to export, the markets in which the winegrowers are positioned, or the functioning of their export department today. The researcher then asked the winegrower to present his ideas for improving his export sales. The winegrower was free to present all his ideas. Finally, the researcher presented the solutions proposed by the importers. The objective of the researcher was to show the winegrower the real expectations of the market and the importers. For this part, the researcher asked whether the winegrower was able to meet the expectations of the importers and the solutions.

As shown in Table 7, questions 1 to 9 were for sub-questions 4. Sub-questions 5 were covered by questions 10 to 12 of the interview.

*Table 7 : Interview questions by sub-questions*

| Sub-questions | Interview questions |
| --- | --- |
| Sub-question 4 | 1, 2, 3, 4, 5 |
| Sub-question 5 | 6, 7, 8 |

Once all the data was collected during the interviews, it was analysed according to the method of thematic content analysis described below. The responses of the importers were first analysed and then compared with those of the winegrowers.

- Read the transcripts

The researcher began by establishing a general impression of the data and identifying common themes. The aim was to find common patterns in the data set that helped the researcher in the final addition of data.

- Labelling of revealing elements :

The researcher used the process of labelling relevant words, phrases or sections using codes. These codes helped to identify important types and patterns of qualitative data. Labels were applied to actions, activities, concepts, differences, opinions, processes or anything else that the researcher deemed relevant. The purpose of the codes was to organize the data for dissemination.

- Decide which codes are the most important and create categories by grouping several codes together.

The researcher used an Excel spreadsheet to easily compile the data. The researcher completed the Excel sheet with a Google Form document to structure the analysis.

- Label the categories and decide which ones are most relevant and how they relate to each other.

The analysis of the interviews will involve categorizing similar responses into different categories to get specific ideas for sub-questions. And points of difference are also compared.

- Write the result

These comparisons made it possible to draw up a result that gave an answer to the sub-questions.

This method of analysis is applied to all interviews, i.e. interviews with importers and winegrowers. The analyses will be compared and will allow to find points of difference and points of parity between the two parties. The points of difference will be the different responses between importers and winegrowers, which will explain the reasons for the failure of exports by small winegrowers in the Loire.  The points of parity will be the common responses between importers and winegrowers, which will form the basis of the solution provided to winegrowers.

The researcher will write a final remark comparing the analyses of the interviews with importers and winegrowers. The researcher hopes to provide a solution for the small winegrowers of the Loire by using parity points and correcting the points of difference.

# 3 RESULTS

Chapter 3 presents the results obtained by the researcher during the research. The qualitative method was used to answer all sub-questions. The researcher conducted 14 interviews with the aim of answering the sub-questions and the main question. The researcher interviewed 9 importers (3 United Kingdom, 2 USA, 1 Switzerland, 1 China, 1 Belgium) and 5 winegrowers from across the Loire Valley. In order to obtain the most precise answers, and to give a pragmatic response, the author of this report visited all the winegrowers interviewed and conducted a telephone interview with all the importers interviewed. The chapter will provide answers to the sub-questions obtained from the interviews that are ordered by the sub-questions. In addition, the interviews are summarised in a table to simplify reading.

This research focused on five key markets for Loire wines: The United States, the United Kingdom, Switzerland, France, and China. All the interviews can be found in Appendix 3. Each interviewee was asked the same questions.

## 3.1 The position of French and Loire wines in an importer's product portfolio

This question *was* constructed from three sub-parts which include the analysis of the product portfolio at the international and then national levels. Finally, the last part focuses on the place of Loire wines in the portfolio of importers. The aim is to determine the context in which Loire winegrowers are placed.

The result of the classification of wines at international level is presented in the following table.

*Table 8 : The classification of importers' product portfolios at the international level.*

| | Importers | Which countries are the most represented in your product portfolio? | | |
|---|---|---|---|---|
| N°1 | Arthur Bisson (Suisse) | France | | |
| N°2 | Jon David Headrick (USA) | France | | |
| N°8 | Wine Affairs (UK) | France | | |
| N°9 | M. Judy Xu (Chine) | France | | |
| N°5 | Ask Me Wine (Belgium) | 1. France | 2. Italy | 3.Spain |
| N°6 | Avalon wine (UK) | 1.France | 2.Italy | 3.Spain |

| | | | | | |
|---|---|---|---|---|---|
| N°3 | Wine Access (USA) | 1. USA | 2. France | 3. Italy | 4. Spain |
| N°4 | ABS Wine (UK) | 1. France | 2.South Africa | 3. Chile | 4. Germany |
| N°7 | Torman Hunt (UK) | 1.France | 2. Italy | 3.USA | 4.Spain |

Among the nine importers questioned, eight position French wines as the country best represented in their product portfolio. In addition, four of the importers work exclusively with French wines. Italy and Spain are also well represented among importers. Finally, it can be seen the presence of New World wines at ABS Wine, a major importer in the United Kingdom.

This section shows the place of Loire wines in importers' product portfolios. The purpose of the following table is to present the ranking of French wine-producing regions in an importer's product portfolio.

*Table 9 : The classification by wine-growing region of the importers' product portfolios at the level of French wines.*

| | Importers | Which French wine region are the most represented in your product portfolio? | | | | |
|---|---|---|---|---|---|---|
| N°9 | M. Judy Xu (Chine) | 1. Rhône | 2. Burgundy | | | |
| N°2 | Jon David Headrick (USA) | 1. Loire | 2. Champagne | 3. Cote du Rhône | | |
| N°4 | ABS Wine (UK) | 1. Burgundy | 2. Bordeaux | 3. Champagne | | |
| N°5 | Ask Me Wine (Belgium) | 1. Rhône | 2. Languedoc | 3. Loire | | |
| N°8 | Wine Affairs (UK) | 1.Rhône | 2. Burgundy | 3. Loire | | |
| N°6 | Avalon wine (UK) | 1. Burgundy | 2. Loire | 3. Champagne | | |
| N°1 | Arthur Bisson (Suisse) | 1. Loire | 2. Beaujolais | 3. Bourgogne | 4. Rhone | |
| N°3 | Wine Access (USA) | 1. Bordeaux | 2. Rhone | 3. Burgundy | 4. Champagne | |
| N°7 | Torman Hunt (UK) | 1. Rhône | 2. Burgundy | 3. Bordeaux | 4. Loire | 5. Champagne |

The importers' responses show that the but most represented regions are Burgundy and the Rhône Valley. However, importers 1 and 2 are professionals specialising in Loire wines, which justifies the number one position in the ranking for Loire wines. For the rest of the importers, the top two places are either taken by Burgundy or the Rhône.

*Table 10 : The place of Loire wines in an importer's product portfolio*

| | Importers | Do you have any wine from the Loire Valley? | If yes, which wine from the Loire Valley ? | | |
|---|---|---|---|---|---|
| N°1 | Arthur Bisson (Suisse) | Yes | Very important range | | |
| N°2 | Jon David Headrick (USA) | Yes | Very important range | | |
| N°6 | Avalon wine (UK) | Yes | Very important range | | |
| N°3 | Wine Access (USA) | Yes | Crémant de Loire | Sancerre | Pouilly Fume |
| N°4 | ABS Wine (UK) | Yes | Sancerre | Muscadet | Touraine |
| N°5 | Ask Me Wine (Belgium) | Yes | Pouilly Fumé | Sancerre | Touraine |
| N°7 | Torman Hunt (UK) | Yes | Sancerre | Muscadet | Saumur Champigny |
| N°8 | Wine Affairs (UK) | Yes | Sancerre | Vouvray | Reuilly |
| N°9 | M. Judy Xu (Chine) | No | X | | |

Thanks to the additional questions asked during the interviews, the researcher estimates that Loire wines represent less than 10% of an importer's product portfolio[5]. And of this 10%, the "Sancerre" appellation represents around 60% of the range of Loire Valley wines for an importer on average. In other words, the "Sancerre" appellation accounts for a large share of Loire wine exports. The table above summarises importers' responses to their selections of Loire wines.

[5] See appendix 3

Finally, to complete the last part of this sub-question, the demand for wines from the Loire Valley were studied. Table 11 summarises the importers' responses.

*Table 11 : Demand for Loire wines according to importers*

| | Importers | How important is your demand of Loire Valley wines ? |
|---|---|---|
| N°1 | Arthur Bisson (Suisse) | Very Strong |
| N°2 | Jon David Headrick (USA) | Strong |
| N°3 | Wine Access (USA) | Medium |
| N°4 | ABS Wine (UK) | Medium |
| N°5 | Ask Me Wine (Belgium) | Medium, Strong |
| N°6 | Avalon wine (UK) | Strong |
| N°7 | Torman Hunt (UK) | Medium |
| N°8 | Wine Affairs (UK) | Medium |
| N°9 | M. Judy Xu (Chine) | Not important |

The mention "medium" is the most frequent, since 5 of the 9 importers consider their demand to be medium. According to the importers questioned, demand for Loire wines is not very high due to a lack of recognition of their appellations. However, there is one exception, the importer 1, which specialises in Loire wines. Arthur Bisson has created a network of customers who love Loire Valley wines. As a result, the importer considers that demand to be very strong. This is also confirmed by the importer 2, since Jon David Headrick believes there is a strong demand on his market. Both importers specify that they are convinced by the potential of this region with very interesting wines.

## 3.2 Important factors for successful wine export

Sub-question 2 was composed of three different and complementary questions: the important criteria and the most important criterion for importing wine according to importers, and the role of the winegrower in the commercial export relationship. Applying the method of written analysis in Chapter 2, table 12 summarises the key words and labelling of the important criteria that were identified following the interviews with importers by the researcher.

*Table 12 : The main criteria for choosing a wine to import according to the importers*

| | Importers | What are the main criteria for choosing a wine to import ? | | | |
|---|---|---|---|---|---|
| N°1 | Arthur Bisson (Suisse) | - Quality | - Price | | - Collaboration |
| N°4 | ABS Wine (UK) | - Quality | - Price | | - Collaboration |
| N°5 | Ask Me Wine (Belgium) | - Quality | - Price | | - Appellation |
| N°6 | Avalon wine (UK) | - Quality | - Price | | - Appellation |
| N°7 | Torman Hunt (UK) | - Quality | - Price | | - Appellation |
| N°8 | Wine Affairs (UK) | - Quality | - Price | | - Organic viticulture |
| N°9 | M. Judy Xu (Chine) | - Quality | - Price | - Packaging | - No appellation |
| N°3 | Wine Access (USA) | - Quality / Price | - Publicity | - Story | - Appellation |
| N°2 | Jon David Headrick (USA) | - Quality | - Price | - Appellation | - Organic viticulture |

The quality and price of the wine are the only criteria that appear in all the interviews. The tasting allows the importer to assess the quality of the wine, ABS wine explains that the wine cannot be imported without being tasted. In addition, importers take the price into consideration during the tasting. In conclusion, value for money is one of the most important criteria for exporting. But there are also several other criteria that must be considered.

Importers 2 and 8 underline the trend for organic wines, which is becoming more and more important on the market and is becoming a selection factor. Importer Wine affairs explains that the method of wine production has become part of the consumer's purchasing criteria.

In addition, five importers explain that the appellation is a very important criterion. But it should be qualified, as the importer 9 explains that Chinese consumers does not know the names. The professional adds that it is possible to export without having a known appellation by offering a good quality/price ratio and a well-thought-out packaging.

Importers say that the feeling with the winemaker is paramount. The Swiss importer, Arthur Bisson, says that it is not just a business relationship but a real collaboration between the two parties. Importers number 1 and 4 state that this is an important criterion for export.

The publicity is also an important criterion for exporting wine. Importers appreciate wines that are recognised by journalists and critics. This can help to prove the quality of the wine and the image of the winemaker.

The following table summarises the importers' response for the most important selection criterion for importing wine.

*Table 13 : The most important criteria according to the importers.*

| | Importers | Which of its criteria is the most important ? |
|---|---|---|
| N°1 | Arthur Bisson (Suisse) | Quality |
| N°2 | Jon David Headrick (USA) | Quality |
| N°3 | Wine Access (USA) | Price |
| N°4 | ABS Wine (UK) | Quality / Price |
| N°5 | Ask Me Wine (Belgium) | Quality |
| N°6 | Avalon wine (UK) | Quality |
| N°7 | Torman Hunt (UK) | Quality |
| N°8 | Wine Affairs (UK) | Quality / price |
| N°9 | M. Judy Xu (Chine) | Price |

The importers questioned all give the same answer: the quality of the wine is the most important criterion. It is at the time of tasting that importers make the decision to select the wine. Moreover, some importers, such as ABS Wine and Wine affaire, also add price as the most important criterion.

The table below summarises the criteria expected for wine when an importer is looking for wine.

*Table 14 : Good wine to import according to the importers*

| | Importers | When choosing to import wine, what is good wine to import for you ? |
|---|---|---|
| N°1 | Arthur Bisson (Suisse) | - Needs of the market - History of wine |
| N°2 | Jon David Headrick (USA) | - Needs of the market - History of wine |
| N°3 | Wine Access (USA) | - Needs of the market - Appellation |

| | | |
|---|---|---|
| N°4 | ABS Wine (UK) | - Exclusive - Appellation |
| N°5 | Ask Me Wine (Belgium) | - Needs of the market - Organic Viticulture |
| N°6 | Avalon wine (UK) | - Needs of the market - Organic Viticulture |
| N°7 | Torman Hunt (UK) | - Appellation - Organic Viticulture |
| N°8 | Wine Affairs (UK) | - Needs of the market - Appellation |
| N°9 | M. Judy Xu (Chine) | - Quality - Appellation - Packaging |

For a large proportion of importers, it is the market that decides what is needed. There is no standard wine profile for export, consumer demand varies from country to country depending on consumption habits, lifestyle and various other factors. The answers prove that all wines can be exported as long as they meet demand. To illustrate the point, the Swiss importer has a wealthy clientele, which enables it to sell top-of-the-range wines from the Loire Valley[6]. In contrast to the Chinese importer who explains the need for an attractive price and appellation to sell his bottles to a clientele that is not familiar with the world of wine[7].

However, there are characteristics that make it easier to export wines. For example, ABS Wine works with the winemaker if it is exclusive to the English market. In other words, the winemaker cannot work with another importer.

The appellation determines the attractiveness of the wine on the international market. It is very important as 5 of the 9 importers highlight this element. The attractiveness of the product will be higher if the appellation is recognised, and if the producer is emblematic. The Chinese importer testifies that it is easier to sell a Côte du Rhône than a Loire wine.

Good wine exported is also wine with a history according to the importers. Importers 1 and 2 affirm that the consumer buys, on the one hand the content but also all the intangibility of the bottle. For example, according to Jon David Headrick, consumers are paying more and more attention to the winegrowers' production methods and the little stories surrounding the bottle. Importer Ask Me Wine adds that the trend for organic wines is on the rise. Table 14 illustrates this trend as three importers explain that today, organic wines are good wines to export.

Finally, packaging can make a wine successful on the international market. The Chinese importer explains that its consumers are very sensitive to the design of the bottle, especially

[6] See Appendix 3 : interview
[7] See Appendix 3 : interview

the label and the style of the bottle. The importer explains that the packaging represents the wine, which can convince the consumer to buy the bottle.

Finally, the researcher asked importers about the role of the winegrower in a commercial relationship. The following table summarises the importers' responses from the interviews.

*Table 15 : The role of the winegrower in a commercial relationship with an importer*

| | Importers | What do importer expects from the winemaker? |
|---|---|---|
| N°7 | Torman Hunt (UK) | - Consistency |
| N°2 | Jon David Headrick (USA) | - Control - Reactivity |
| N°8 | Wine Affairs (UK) | - Control - Marketing |
| N°9 | M. Judy Xu (Chine) | - Collaboration - Consistency |
| N°1 | Arthur Bisson (Suisse) | - Reactivity - Collaboration - Consistency |
| N°3 | Wine Access (USA) | - Marketing - Collaboration - Control |
| N°5 | Ask Me Wine (Belgium) | - Control - Collaboration - Consistency |
| N°6 | Avalon wine (UK) | - Price stability - Collaboration - Consistency |
| N°4 | ABS Wine (UK) | - Reactivity - Collaboration - Consistency |

First of all, the importers ask the winegrower to provide wines that correspond to what they tasted during the selection process. The English importer, Torman Hunt, requires consistency in the winemakers' production to guarantee consumer satisfaction. The importers also demand stable prices from the winemakers in order to be able to install the product in the market over time. This is a very important role for the winemaker as 6 of the 9 importers demand consistency in wine quality and price.

Then, among the importers questioned, 4 importers ask the winegrowers to control everything that will be presented to the final customers. The role of the winegrower is to regularly control the quality of the wine, but also of the labels and the boxes.

Importers 1, 4 and 8 noted the importance of reactivity on the export market. The importers ask the winegrowers to respond quickly to questions and orders in order to satisfy the customer. The winegrower must be reactive in order to establish the commercial relationship over time, in addition to the fact that the export world is a very complex market.

Importers also expect a real marketing support during the commercial partnership. Importers appreciate when winegrowers transfer communication supports (photo, video) to help create marketing support. In addition, social networks are also important in today's trade. All these supports are appreciated and requested by importers so that they can reuse them for their communication.

Finally, 6 importers ask for a real collaboration with the winemaker, given the complexity of the international market. The importers want a profitable commercial relationship for both parties. The Swiss importer points out that problems must be solved together, that it is a team effort.

## 3.3 The solutions to export for the small winegrowers according to the importers

Sub-question 3 was based on the second part of the researcher's interviews. The tables are summaries of the key word labelling that reveal important ideas for answering the sub question. The aim of this analysis is to deduce ideas to help small Loire winegrowers develop export sales.

The following table sets out the main requirements that small Loire winegrowers must meet in order to succeed in exporting.

*Table 16 : The final customer according to the importers*

| | Importers | What are the most important requirements that small wineries have to meet in order to import? | |
|---|---|---|---|
| N°9 | M. Judy Xu (Chine) | - Volume | |
| N°5 | Ask Me Wine (Belgium) | - Volume | |
| N°1 | Arthur Bisson (Suisse) | - Export procedure | |
| N°7 | Torman Hunt (UK) | - Export procedure | |
| N°3 | Wine Access (USA) | - Volume | - Export procedure |
| N°2 | Jon David Headrick (USA) | - Reactivity | - Export procedure |
| N°4 | ABS Wine (UK) | - Reactivity | - Export procedure |

| | | | |
|---|---|---|---|
| N°8 | Wine Affairs (UK) | - Constant quality | - Export procedure |
| N°6 | Avalon wine (UK) | - Constant quality | - Reactivity |

During the interviews, 3 importers stated that it is essential for winegrowers to be able to offer sales volumes proportionate to the market. Indeed, the importers explain that the orders are important in view of the size of their market, i.e. one country. The Belgian importer recognises that small winegrowers lack the export volume to be able to set up in the large markets.  This forces winegrowers to work only with one importer, as Judy Xu explains.

The export procedures are also very complex, and the winegrowers do not master them. During the interviews, 6 importers noted that small wineries do not know the procedures of import business, which means that importers must help the winemakers to fill in the documents, which represents a lot of time and energy for them. ABS wine adds that winemakers need to immerse themselves in the market and be very reactive to respond as quickly as possible to customer requests. Reactivity and flexibility are also lacking in small wineries. Importers 2, 4 and 6 criticise a lack of availability and flexibility on the part of small winegrowers.

Finally, importers stress the importance of consistent wine quality. This is a very important requirement in the export market to ensure long-term sales success. Every year the quality must be the same as the previous year. Importer Avalon wine specifies that the winegrower must never lower production quality at the risk of losing the commercial contract.

For the last part of the interview, the researcher left the floor open with open questions for the importers. The aim of the researcher was to use the importers' knowledge to provide an answer that is as close as possible to the reality of the market.

*Table 17 : Solutions to develop the export sales by the importers*

| | Importers | What can small winemaker from Loire valley make to develop theirs exports ? |
|---|---|---|
| N°1 | Arthur Bisson (Suisse) | - Export Platform |
| N°5 | Ask Me Wine (Belgium) | - Export Platform |
| N°4 | ABS Wine (UK) | - Visit the market |
| N°3 | Wine Access (USA) | - Niche product |
| N°8 | Wine Affairs (UK) | - Export strategy |

| | | | |
|---|---|---|---|
| N°6 | Avalon wine (UK) | - Marketing | - Export strategy |
| N°2 | Jon David Headrick (USA) | - Visit the market | - Export strategy |
| N°9 | Judy Xu (Chine) | - Visit the market | - Export strategy |
| N°7 | Torman Hunt (UK) | - Niche product | - Export strategy |

The table above summarises the ideas proposed by the 9 importers interviewed. Several ideas emerged from the importers during the interviews.

First, the Swiss and Belgian importers are currently working with small winegrowers through export platforms. The advantage is that several small wineries can be brought together in a single offer, which allows the importers to work with the wines of the small winegrowers without difficulty. Furthermore, they point out that the advantage of the platforms is that the orders can be mixed and matched, which shortens the export procedure as everything is gathered in one place. Thanks to this platform, importers work with many small winegrowers without meeting the requirements presented in Table 17. The importers also explain that the platform's sales staff members are very responsive and available, since they deal with export on a full-time basis. They have the skills for international business procedures and speak English, which facilitates the business relationship. Importers are satisfied with the way the platform works since it meets all the requirements imposed by the international market.

During the interviews, several importers explained the importance of moving around the markets. On the one hand, for the commercial relationship but also for prospecting. To do this, the importers propose several methods. The first is to come to international trade fairs in order to meet importers and present their wines. The other method is to prepare appointments by looking for importers on the internet and to approach them physically by organising the prospecting tour. On the other hand, visiting the markets also allows to be confronted with consumers to anticipate trends and develop their export sales. Importers 2, 4 and 9 appreciate when the winegrower is on the move. According to them, very few small cellars come to meet them. Finally, the British importer, AVS Wine, would like the winegrowers to visit the British market with its sales team, to create a point of difference with the competition to build customer loyalty and develop potential customers.

The importers also proposed solutions that directly concern the product. Importer Thorman Hunt and Wine Access testify that there is potential for Loire wines for export but that they need to offer niche wines. Indeed, the Loire cannot rely on their appellations as they should be renown. However, both importers believe in the potential of the wines in view of the climate and the terroir. According to them, the Loire can become the benchmark for modern wines on the international market, i.e. fresh and fruity wines, which are sought after by new consumers. Importers 7 concludes that the wines that follow this trend will become great wines with a unique history.

Finally, according to five importers, the export strategy of the small cellars of the Loire is not adapted to their product. Avalon Wine explains that Loire winegrowers need to optimise their strategy in order to choose the market segment that suits them. If the strategy is fixed, then the winegrowers will be able to optimise their production to be competitive on the market. It is the commercial strategy that defines the production strategy and not the other way round. It is up to the winegrower to adapt to market trends. According to importer Avalon Wine, if the winegrower chooses market segment correctly, export sales will be higher, which in turn will enable to meet all the requirements of the international market. The importer believes that if the winemaker works on communication with promotion and social networks, it can help to develop export sales.

Finally, importer 2 specifies that if the winegrower does not have the time to deal with exports, Jon David Headrick can then choose a commercial agent to represent him, while the importer explains that his strategy must be adapted according to his means and skills.

## 3.4 The export criteria according to the winegrower

Sub-questions four and five are characterised by physical interviews with five small wineries that have been selected by the researcher.

For sub-question 4, the researcher's method was to ask the same questions from the importers to the winegrowers in order to compare the answers. The following tables represent the labelling of the key words identified from the interviews.

Table 18 summarises the winegrowers' answers on the criteria for choosing a wine for an importer.

*Table 18 : The main criteria for choosing a wine for importer according to the winegrowers*

| | Winegrowers | What are the main criteria for choosing a wine for importer? |
|---|---|---|
| N°2 | Domaine de la Fessardière | - Quality - Price - Appellation |
| N°3 | Domaine Yannick Amirault | - Quality - Price - Appellation - Volume |
| N°5 | Domaine Champault | - Quality - Price - Appellation - Collaboration |

| | | |
|---|---|---|
| N°1 | Domaine Ménard Gabaurit | - Quality - Price - Appellation - History |
| N°4 | Domaine Fabrice Gasnier | - Quality - Price - Volume - History |

Quality and price are the two criteria that have been cited by every winegrower as the most important. For the Champault estate, tasting allows the importer to assess the interest of the wine for its market. However, in most cases the price remains the determining factor in obtaining the market.

According to the winegrower, the appellation is considered on the export market, especially if it is known internationally: 4 out of 5 winegrowers put it forward.

The winegrowers also named two other criteria. The first is volume. According to Yannick Amirault, when selecting wines, one of the major criteria is the volume of wines available. Given the size of the markets, the winegrower must have large stocks in order to be able to position himself on the importers' offers.

Finally, two winegrowers explain that it is essential to know how to tell a story about the estate, the winegrower and the bottle. Fabrice Gasnier explains that this becomes an argument for the importer because it allows him to stand out from the competition because each story is unique.

Table 19 represents the winemakers' answers on the most important selection criterion for importers when selecting wine.

*Tableau 19 : The most important element for the importer according to the winegrower*

| | Winegrowers | What do you think is the most important element for the importer? |
|---|---|---|
| N°1 | Domaine Ménard Gabaurit | - Quality |
| N°2 | Domaine de la Fessardière | - Price |
| N°3 | Domaine Yannick Amirault | - Appellation |
| N°4 | Domaine Fabrice Gasnier | - Quality |
| N°5 | Domaine Champault | - Appellation |

The researcher notes that the answers are not identical when compared to the winegrowers.

For winemakers 1 and 4, the quality of the wines is the most important. For La Fessardière it is the price. This winegrower thinks that price is the most important aspect and that the appellation and fame are not enough to win certain markets. It is necessary to have the best quality-price ratio. The winegrower adds that it is also important to have a regularity in prices so as not to lose the markets conquered. In the event of an increase, a pertinent argument is then needed with importers.

Finally, for Yannick Amirault, the appellation is the most important criterion, especially for those who buy a bottle for the fame of the appellation, without necessarily knowing the wine: this is the concept of label drinker. Domaine Gasnier adds that importers like wines that sell themselves thanks to the fame of their appellation.

The table below deals with the question of the role of the producer in a commercial relationship according to the winegrowers.

*Table 20 : The role of the producer with the importer*

| | Winegrowers | What do you think is the role of the producer ? |
|---|---|---|
| N°1 | Domaine Ménard Gabaurit | - Collaboration - Consistency |
| N°2 | Domaine de la Fessardière | - Consistency - Collaboration |
| N°3 | Domaine Yannick Amirault | - Collaboration - Consistency - Reactivity |
| N°4 | Domaine Fabrice Gasnier | - Collaboration - Consistency - Reactivity |
| N°5 | Domaine Champault | - Consistency |

All the winegrowers gave the answer of consistency. It is also very important to have a constant, regular production, if possible, always in line with quality expectations. One should not disappoint one's importer about the quality of the wine.

For four of the five winegrowers interviewed, collaboration is also the role of the producer with the importer. This presupposes a partnership and a relationship of trust between the two parties. The producers explain that the winegrower must nourish the relationship, give information on the latest news from the estate (wine making, the progress of the harvest...) and be very responsive to the importers' requests (samples, shipments, administrative procedures). Responsiveness is part of the producer's role according to the Domaine Yannick Amirault and Fabrice Gasnier. It is necessary to be professional so as not to put the importer in difficulty. Finding an importer is not an easy step, so you have to do everything possible to build loyalty and create a more personal relationship with the importer.

Table 21 summarises the responses of the winegrowers concerning the criteria for good wine to export.

*Table 21 : Good wine to export according to the winegrower*

| | Winegrowers | What is good wine to import for you ? |
|---|---|---|
| N°1 | Domaine Ménard Gabaurit | - No answer |
| N°2 | Domaine de la Fessardière | - Organic wine<br>- Needs of the market |
| N°3 | Domaine Yannick Amirault | - Needs of the market |
| N°4 | Domaine Fabrice Gasnier | - Needs of the market |
| N°5 | Domaine Champault | - Needs of the market |

While others all specified that the wines produced must above all be able to meet a market need, the Ménard Gabaurit estate was unable to answer the question. The answer shows that some winegrowers are not immersed in the market. Mr Ménard explains that it is not easy to manage the trade and the production part at the same time.

For the other four winegrowers, they agree, explaining that the right wine to import is the wine that is demanded by consumers.

The domaine de la Fessardière adds that the market for organic wines was expanding and that it was easier to position oneself in this niche. Importers are increasingly looking for this wine profile. The winemaker explains that wine needs to be adapted to demands of the clientele.

## 3.5 The solutions to increase export sales according to the winegrower

Table 22 represents the codes used by the researcher to analyse the winegrowers' responses for solutions that can be put in place to develop export sales.

*Table 22 : Solutions that can be put in place to develop export sales, according to the winegrowers*

| | Winegrowers | What solutions can be put in place to develop your export sales? |
|---|---|---|
| N°1 | Domaine Ménard Gabaurit | - Marketing |
| N°2 | Domaine de la Fessardière | - Export strategy - Visit the market |
| N°3 | Domaine Yannick Amirault | - Product - Marketing |
| N°4 | Domaine Fabrice Gasnier | - Export strategy - Product - Visit the market |
| N°5 | Domaine Champault | - Visit the market - Product - Export strategy |

For the Ménard Gabaurit estate, it has become necessary to develop digital communication: website, social networks, also involving the importer. “It is necessary to succeed in increasing the visibility of the winegrower in the media in order to reach a maximum of consumers”, explains the winegrower. Domaine Amirault believes that the specialised press and wine critics are vectors of renown that help sales. Few of winegrowers have received good reviews at the international level but think that it would be very beneficial. Critics are not very interested in Loire Valley wines. Yannick Amirault specifies that it is very difficult to attract the attention of wine critics and get a rating because their appellations are not sufficiently known internationally (example: Parker guide).

Three other producers explain that winegrowers can change their export strategy. Domaine de la Fessardière has succeeded in developing its export sales thanks to a change in commercial policy. Domaine de la Fessardière specifies that the Loire winegrowers must choose their market according to their product. The winegrowers must position themselves in countries where demand corresponds to their range of wines. Choosing the right export strategy also applies to importers. Fabrice Gasnier believes that prospecting must be adapted to his strategy. It is necessary to look for importers who correspond to the philosophy of the winegrower and the wines.

Winegrowers are also aware that moving around the markets would facilitate export sales. The Domaine de la Fessardière explains that to sell, you have to go and visit and organise yourself at the commercial level in order to be efficient. Several winegrowers explained that they feel ready to travel to establish contacts on the spot with importers. The Champault estate said that it had registered for the wine fair dedicated to export, Wine Paris.

However, some of the small Loire winegrowers do not have the language skills to communicate in English. Of the 5 winegrowers interviewed, only Domaine de la Fessardière could speak English. Domaine Amirault explained during the interview, the frustration that was present because of not being able to share the passion and knowledge with importers because of the language barrier. In addition, small winegrowers usually have very busy days, and it is difficult to free up time for a new activity. This point is notable for a large proportion of Loire winegrowers, explains Fabrice Gasnier.

Finally, three winegrowers are thinking of developing export sales by producing even higher quality wines. Domaine Amirault wants to do better in terms of wine quality and is thinking of diversifying its offer to provide a more complete range of products and services. As for Champault, it specifies that the appellation of a wine must follow a precise model. Mr Champault (Domaine Champault) explains that for Sancerre wines, the importer knows what is being bought. Sancerre being the strong export appellation for Loire Valley wines. The solution for developing export sales would be to enhance the image of the Loire appellations in collaboration with all the winegrowers of each appellation.

# 4 DISCUSSION OF RESULTS

The aim of this research is to provide solutions for small Loire winegrowers to develop export sales divided into 3 sub-sections. The first step was to find out the place of Loire wines in an importer's product portfolio. The second step was to understand the criteria for export success and finally to provide solutions to be implemented to develop export sales for a small producers in the Loire Valley.

On the one hand, thanks to this research, the author has discovered the criteria for successful export of wine with less recognised appellations. On the other hand, pragmatic solutions to Loire winegrowers to increase exports can be formulated.

In this chapter, the answers of both parties will be compared and will give rise to critical reflection. The researcher will discuss the difficulties encountered and the changes made during the research.

## 4.1 The position of French and Loire wines in an importer's product portfolio

France is an international leader in wine sector exports (Potevin, 2018). This explains the responses of importers who show that French wines are very present in product portfolios. The responses from importers also prove that there is a trend for Loire wines as they are represented in the importers' offer. However, they are not among the attractive products, as Rhône and Burgundy wines are much more represented.

It can be deduced that the reputation of Loire wines is medium at an international level, which could explain the place of Loire winegrowers on international markets.

Next, importers explain that exports of Loire wines are dominated by the "Sancerre" appellation. According to the importers, "Sancerre" wines account for 60% of Loire Valley wine exports. At present, only one appellation is valued at international level among the 52 AOCs. Figures from the regional committee of wine interprofessions confirm this trend. Exports from Sancerre represent almost 100 million euros. In second place is the Muscadet appellation, where exports will amount to 20 million euros in 2019. Sancerre generates almost half of the exports of Loire Valley wines (Interloire2019).

The lack of renown of the appellations results in an average demand in general as shown by the importers' answers. However, the Loire Valley has export potential according to two importers specialising in the Loire Valley. This trend is confirmed in the USA, where Americans have increased their white wine consumption by 36% since 2005 (Cougard, 2019). In addition, there is a clear preference for two grape varieties, Sauvignon and Chenin, which are the two grape varieties that are the flagship of the Loire Valley. Exports of white Loire wines have tripled in ten years, from 26 million euros to 67 million, according to figures from the inter Loire, the demand for white Loire wines is growing.

## 4.2 Important factors for successful wine export

Importers identified several important points for export success.

First of all, the selection criteria are very precise. The importers explain that the selection is based above all on the price/quality ratio, in particular with tasting to judge the quality of the wine.

Then, the appellation of the wine is also an important point for importers. This is the weakness of Loire wines, explain the importers, as the appellations lack fame. This is reflected in the average price of a bottle, which is €8 for a wine from the Loire Valley compared to €50 for a wine from Burgundy, where the appellations are very well known (Gene, 2015; Levinligerien, 2017). This is a criterion that reassures the customer, especially when the wine comes from a recognised appellation.

Advertising around wine is also an important criterion to succeed in exporting a wine. Importers add that the consumer feels reassured when a critic attributes a gratifying tasting note to the wine. For example, by awarding the mythical score of 100/100 to wines considered exceptional, the American critic Robert Parker has turned the fate of many estates' upside down, propelling them among the best in the world (Baudouin, N.d).

Collaboration with the winegrower is also one of the key criteria for export success. Importers ask to work in partnership with the winemaker so that both parties form a single team. Importers explain that collaboration must be open to all newcomers.

Finally, organic wines are increasingly in demand by consumers. Importers want to meet their customers' expectations and are increasingly looking for organic wines. Like the US market where today, 13% of the products sold in the United States come from organic agriculture and 80% of Americans consume them (Harel, 2018). This is a real opportunity for the winegrowers of the Loire. More generally, world consumption of organic wine has doubled in five years (Cougard, 2019).

The selection criteria according to the winegrowers are generally identical to those of the importers. They agree on quality, price, appellations and collaboration. However, no winegrower has marked organic wines as a selection criterion or for advertising purposes. On the other hand, the winegrowers added that the history of the estate and of the wine was a point of support. This is in line with the advertising criterion mentioned by the importers. The winegrowers explained that it is important to sell a story to customers. Behind a bottle, the consumer also buys the story of the winegrower and the wine. Finally, the winegrowers also spoke of volume as a selection criterion. Several winegrowers explained that export offers are often large markets where a large quantity of available wine is demanded.

The following table compares the responses between winegrowers and importers.

*Table 23 : Comparison of responses from winegrowers and importers for export selection criteria*

| | Importers | Winegrowers |
|---|---|---|
| The main selection criteria for exporting. | → Quality<br>→ Price<br>→ Appellation<br>→ Collaboration<br>→ Publicity<br>→ Organic wine | → Quality<br>→ Price<br>→ Appellation<br>→ Collaboration<br>→ Volume<br>→ History |

The winegrowers are quite aware of the selection criteria requested by the importers. However, they can develop their advertising and organic wines since none of the winegrowers have thought about these two selection criteria. These two points can help the winegrowers to develop their export sales since they are criteria requested by the importers. According to one study, advertising would increase sales by 9% on average for the beverage category (Latribune, 2011).

For importers, the most important criterion is the price/quality ratio. This is the point of balance where the decision is made when importers taste the wine and evaluate it according to its price.

For the winemakers, some have given the same answer as the importers. As illustrated in table 24, however, one winemaker felt that the appellation was the most important criterion. The small winegrowers of the Loire think they are having a disadvantage.

*Table 24 : Comparison of responses from winegrowers and importers for the most important export selection criterion*

| | Importers | Winegrowers |
|---|---|---|
| The most important selection criterion. | → Quality<br>→ Price | → Quality<br>→ Price<br>→ Appellation |

Winegrowers must be positive as the appellation of their wine is not a handicap.

*Table 25 : Comparison of responses from winegrowers and importers for good wines for export*

| | Importers | Winegrowers |
|---|---|---|
| Good wines for export | → Needs of the market<br>→ Organic Wine<br>→ History of wine<br>→ Exclusive<br>→ Appellation<br>→ Packaging | → Needs of the market<br>→ Organic wine<br>→ Pass |

Importers explain that a good wine to be imported is determined according to the needs of the market. Each market has its own specificity and importers are looking for wines that meet consumer demand.

However, importers explain that there are points that are always in demand. For example, a wine with a history is good wine for export. Importers also add the importance of packaging. Indeed, according to trade experts, 52% of purchasing decisions take shape on the shelf. From now on, modern packaging must have the most attractive external appearance possible in order to attract the consumer's attention (Créer-entreprendre, 2020).

Wines that are sold by name are good wines. This refers to listed appellations. Importers explain that the name of the wine can considerably boost sales. And importers work a lot with these wines. As a study carried out at a professional wine fair shows, the region of origin of the wines was the most important criterion to guide the importers' route (CNIV, 2019).

Good wine to be imported is also a wine exclusive to the importer. This makes it possible to stand out from the competition and have control over the product.

As illustrated in Table 25, the responses of winemakers are similar to those of importers but less complete. The producers explain that the needs of the market determine the importers' demand. They also express that organic wines are increasingly sought after by importers. However, one winegrower did not know how to answer the question. This shows the lack of immersion in the international market on the part of the winegrowers, which is essential to succeed in exporting. The less complete answers of the winegrowers compared to those of the importers reveal a lack of knowledge of the market.

*Table 26 : Comparison of responses from winegrowers and importers for the role of the winegrower.*

| | Importers | Winegrowers |
|---|---|---|
| The role of the winegrower in an international commercial relationship. | → Reactivity<br>→ Collaboration<br>→ Consistency<br>→ Marketing<br>→ Control<br>→ Price stability | → Reactivity<br>→ Collaboration<br>→ Consistency |

The answers from the interviews allow to identify the role of the winegrower in order to succeed in export.

Winegrowers and importers agree on three criteria: responsiveness, collaboration, and regularity.  Importers add three other items.

Concerning the three points common to winegrowers and importers. The collaboration is a success factor in maintaining a lasting and personalised relationship over time and is expressed at all levels. This criterion is more in the emotional sphere, a register in which small winegrowers are at ease. Responsiveness is essential so as not to worry the customer. It also relates to control and contributes to reliability. The winegrower must look at all the aspects that are going to be presented to consumers, which is very important for importers. Consistency is also cited by both parties. It brings stability and confidence and allows for long-term stability.

Importers add marketing with communication on social networks, the fame of the specialised press, the website. Winegrowers must also create communication supports for importers. Winegrowers must control and check the quality of the product (wine, bottles, packaging, labels) and administrative procedures. Finally, the winemaker must ensure a stable price over the long term so as not to destabilise the existing market.

Winegrowers must consider all the criteria in order to establish themselves on the export market in the long term. Marketing is becoming more and more important and winegrowers must devote financial and human resources to enhance their image and product internationally. Export work cannot be improvised because it requires a great deal of rigour and knowledge of export procedures. Importers point out that some winegrowers lack know-how in the administrative field.

## 4.3 The solutions for the small winegrower from Loire valley to develop export sales

Table 27 presents the winegrowers' and importers' solutions to develop the winegrowers' export sales.

*Table 27 : Comparison of responses from winegrowers and importers for Solutions to be put in place to develop exports*

| | Importers | Winegrowers |
|---|---|---|
| The solutions to be put in place to develop the export sales of small Loire winegrowers. | → Export Platform<br>→ Visit the market<br>→ Niche product<br>→ Export strategy<br>→ Marketing | → Marketing<br>→ Export strategy<br>→ Visit the market<br>→ Product |

Importers and winegrowers agree on four proposals to improve exports:

By developing marketing, particularly digital marketing, the winegrower will indirectly benefit the importer and thus increase winegrower reputation. Moreover, both parties have notified on the willingness to work together, which would be very beneficial for the marketing part. In order to to increased profits for each participant in the distribution channel.

Defining export strategy by targeting markets adapted to products. This will make the prospecting work more efficient. It is also necessary to target importers to facilitate the prospecting process. Defining the export strategy will help the winegrower to position himself on the right markets. In the long term, winegrowers can adapt their production to the market (for example, by creating specific wine).

Trade fairs are an opportunity to meet and create contact with new importers (PRO WEIN, WINE PARIS,). The success of trade fairs is undeniable. For a small winegrower, the stand is a passport to export, but not only because it allows to prospect, present new products, forge partnerships, learn about market and boost the company's reputation (ASKENAZI, 2011). Visiting the market can enable a better understanding of customers and allow the company to adapt its approach to importers.

The winegrowers also propose to increase the quality of the product to boost sales. Importers point out that niche products are also solutions for starting exports. In this case, it is no longer the appellation that counts but the product itself, which could be favourable for Loire wines. This is a real opportunity since competition is weak in this market segment, the appellations are not considered. Finally, a study shows that niche products can double the rate of customer satisfaction (agiretentreprendre,2020).

Importers offer another solution: the creation of export platforms. The advantage is to offer a very diverse range of Loire wines from a single company. This is really advantageous for importers, as it saves time for all the export procedures, but also money for logistics. In addition, importers work more easily with small farms since the volumes demanded by importers can be adapted to the available stocks of small winegrowers. Research shows that the collaboration of professionals has helped to develop the internationalisation process of these companies. During the research, the sample consisted of 130 exporters of French wines, located in different wine-growing regions. The results indicate that access to collaboration resources has had a positive impact on the internationalisation process and the export performance of importers (Zen, Fensterseifer & Prévot, 2014). On the same principle, the export platform can help small winemakers in the Loire region to internationalise by pooling resources that are not accessible on their own. Today, there are a few export platforms that work very well for Loire wines but which are not managed by the winegrowers.

## 4.4 Research process

Thanks to an organisation, the researcher was able to carry out all the interviews. The researcher managed to find importers and winegrowers quite easily with the help of professionals. The importers and winegrowers were very interested in the research topic. The results obtained are very positive as they respond perfectly to the identified problem. The research as a whole allows the winegrowers to confront themselves with the reality of the market.

Interviews were conducted according to the availability of professionals. However, the December period is always very intense in the world of wine, which affected the researcher. Indeed, few importers were able to free up 30 minutes of their working time for an interview. After several failures, the researcher changed the strategy and decided to send an email with all the questions of the interview and to wait for the importer's return. This method reduced the time of the interview since the professionals had answered all the researcher's questions in writing. An interview was then made to develop answers and ask additional questions. Germany is the third most attractive market for Loire wines. However, the researcher was unable to find a German importer, so instead Switzerland was chosen..

For the winegrowers, the researcher would have liked to conduct ten interviews. But December is also a very busy period for winegrowers who have little time to devote to extra activities. Given this constraint, the number of winegrowers interviewed was only six. The limit of the research was the number of winegrowers interviewed. A minimum of 9 winegrowers should have been interviewed to obtain a more qualitative research.

The qualitative study was adapted to the problems of small winegrowers in France, since by meeting them, the researcher was able to obtain the best solutions from each of the professionals interviewed. For the importers, it would have been possible to meet them in person at a trade fair, for example. Physical interviews are of better quality. The interview conditions were better (no technical problems: network, computer, etc.) and the interviews were more complete compared to those conducted remotely.

However, the professionals stressed the interest of research in finding solutions to this problem. All the producers and importers interviewed were satisfied with the way the interview was conducted. It should be noted that the interview questions were modified, particularly for importers. During the first interview, the researcher noticed that the professional was in a hurry at the end because the interview was too long. The researcher therefore decided to delete certain questions that were sometimes redundant.

The results of the research confirm the information gathered during the literature review. The researcher has collected enough reliable data to provide an answer to the problem of small winegrowers in the Loire.

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# 5 CONCLUSIONS AND RECOMMANDATIONS

In the wine sector, export is essential if small winegrowers want to develop and ensure the sustainability of their business. However, the international market is a complex environment where it is difficult to make a place for oneself. Small winegrowers are unable to export because of a lack of knowledge and means. However, the domestic consumption in the French market is decreasing more and more, so it is necessary to turn to export The aim of this research was to provide small winegrowers in the Loire region with solutions for developing export sales. In order to understand the objective of the research, the researcher had to deal with various subjects such as wine exports around the world and identify the important points for exporting. The researcher had to understand and listen to both sides (importers and winegrowers) in order to provide the best solutions to the problem.

The first sub-question enabled the French wines to be placed in an importer's product portfolio. First of all, France is the leader in wine exports. This can be validated in view of the importers' answers. For the Loire, there are wines from the region in the importers' offer, however they are placed behind Burgundy and the Rhône. The demand for Loire wines is medium, but there are specialist importers who have managed to create a demand for these wines. A comparison of the responses highlights the differences between the winegrowers and the importers. It is these points that the winegrowers must work on in order to succeed in exporting.

Sub-questions 2 and 4 identified all the important points for export success. First of all, importers explained the selection criteria for a wine, in particular the importance of the quality/price ratio. Then, the role of the winegrower in a commercial relationship is very important to ensure collaboration. Finally, the research confirmed that the market defines the needs of importers but that there are always essential elements that a wine must meet to succeed in export (packaging, history, advertising). The comparison of the responses with the winegrowers shows a lack of immersion in the market on the part of certain producers. The Loire wine appellation is not an obstacle to exports if winegrowers and importers are prepared to work together to develop exports of Loire wines.

Finally, sub-questions 3 and 5 allow to propose solutions to increase export sales. Winegrowers feel ready to invest financial and human resources in this activity. Thanks to research, there are several solutions that can be combined to help winegrowers export. The export strategy will determine the other solutions put in place by the winegrower.

The main question of this research is the following: how can the small winegrowers of the Loire increase their export sales? An answer can be given. Winegrowers must have a real reflection on their export sales strategy and dare to be more offensive in their communication in order to enhance their brand image. Furthermore, by targeting the right markets to visit according to the export strategy and by implementing the solutions proposed as an export platform or investment in human and financial resources, small Loire winegrowers will be able to increase their export sales. In order to establish themselves over time, the winegrowers will have to meet the requirements of importers, notably by developing marketing, visiting the market and being consistent in terms of the quality and price of their wine. Finally, by personalising their wine both in terms of packaging and their ability to tell a beautiful story about the creation of the product, the winegrowers' sales will be able to increase.

The recommendation that applies to all small winegrowers in the Loire is to choose their export strategy. They must determine in which segment they can position themselves in order to penetrate the right markets. To do this, they must inform themselves about the different markets that exist and be able to identify which markets their products meet demand. The Pleinchamp website offers more than 30 market analyses on wine.

- If the winegrower wishes to develop exports through an intermediary.

- In the short term, it would be preferable to work with a senior export sales representative to start the activity, in order to benefit from his experience so as not to make mistakes. Another alternative is to join an existing export platform such as Vini be Good or La Mano Wine Consult. But sales may be lower due to competition from other winegrowers who are already members.

- In the longer run, the winegrower can create an export platform by working in collaboration with other Loire winegrowers. The creation of the export platform must be very well organised. First of all, all the terms must be defined by applying mixed marketing: Price, Product, Promotion and Communication of the place. Each aspect must be studied and planned. All the winegrowers joining the platform must have the same motivations and objectives for it to work. Winegrowers will have to invest in communication to ensure the visibility of their platform. Moreover, winegrowers can become independent by hiring a sales representative who will work exclusively for the platform. Winegrowers will be able to move into larger markets if the platform expands.

- If the winegrower wishes to develop sales independently

- In the short term, the winegrower must educate by himself for the export market. First of all, the winegrower must acquire knowledge of export procedures, and then skills in English, especially the commercial language. Then the winegrower can start visiting markets. For example, the international fairs that are organised every year (Prowein, Wine Paris, the Loire wine fair) are a good opportunity to start prospecting. For these fairs to be a success, a targeted prospecting campaign must be carried out among importers. Beforehand, the winegrower can search the internet to find the contact details of new importers in order to invite them to come and visit the stand. Importers can be found on the professional network "LinkedIn" or on sites that sell lists of importers such as bestwineimporters. When canvassing, wine growers can also contact importers specialising in Val de Loire wines. Finally, the winegrower must offer the best value for money to importers in order to export successfully.
- In the long term, the winegrowers will have to build loyalty among their importers. To do this, the winegrower must implement financial and human resources. First of all, if export develops, the winegrower will be able to hire an export sales representative. This sales representative must necessarily speak English and have knowledge of the export market. Then, the winegrower will put in place financial means. On the one hand, the sales representative will have to visit the markets, travel, and meet the importers. On the other hand, the producer will have to invest in communication to provide an optimal marketing service to the importers. This is done through social networks; the website and visual communication supports. Finally, winegrowers can also engage in organic farming to boost sales. This trend is increasingly important in the key markets of the Loire.

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# APPENDIX 1 : Questions from the interview with the importer

→ What' is the position of French wine in the importer product portfolio?

1. Which country is most representative in your product portfolio ? Ranking ?
2. Which French wine region is most representative in your product portfolio ? Ranking ?
3. Do you have any wine from the Loire Valley?
4. How important is your demand of Loire Valley wines ?
5. What market do you think has room for small Loire winegrowers?

→ What are the important points for importers when buying a wine ?

6. What are the main criteria for choosing a wine to import ?
7. What is the most important criteria for choosing a wine to import ?
8. What do you think is the role of the producer ?
9. When choosing to import wine, what is good wine to import for you ?
10. Today, which wine profiles are sought ?

→ What can the small winegrower do to get the importer to buy the wines?

11. Do you work with small vignettes?

- Yes : Advantage, inconvenient, why do you do it ?
- No :What can they make to develop theirs exports ?

12. What are the most important requirements that small wineries have to meet in order to import?
13. In view of the characteristics of Loire wines, what are the solutions to improve the export sales for a winegrower from Loire valley ?

# APPENDIX 2 : Questions from the interview with the winegrower

→ Sub question 4 : What are the criteria for exporting according to the winegrowers?

1. What are the main criteria for choosing a wine for importer ?
2. What do you think is the most important element for the importer?
3. What do you think is the role of the producer ?
4. What is good wine to import for you ?
5. Today, which wine profiles are sought by importers?

→ Sub question 5 : According to the winegrowers, what are the solutions to increase export sales?

6. How do you export today?
7. What solutions can be put in place to develop your export sales?

Exposed the solutions of the importers :

8. Would you be ready to meet the expectations of importers?

- If yes, where and how do you want to begin ?
- If not, why not ?

# APPENDIX 3 : Interviews

Here is the link to the interviews. You have to download the files to be able to listen to the soundtracks. Due to technical problems, some interviews with importers are transcribed.

Importers :

https://drive.google.com/drive/folders/1tB0a2vSJNlI_4ymCWrTOsnAZAZn0xCrN?usp=sharing

Winegrowers :

https://drive.google.com/drive/folders/1axZyijThoqZwB5zvNQoGwfcSZuk6JQxC?usp=sharing