



AGENDA ITEM NO. 8(b)

International Marketing

Honore Comfort – Vice President, International Marketing



INTERNATIONAL MARKETING UPDATE

HONORE COMFORT

VICE PRESIDENT, INTERNATIONAL MARKETING

PRESENTING TO:

WINE INSTITUTE

ANNUAL MEMBERSHIP MEETING

DATE:

JUNE 21, 2022

Total US Wine Exports Grow 10.7% in 2021

Strongest growth since 2014

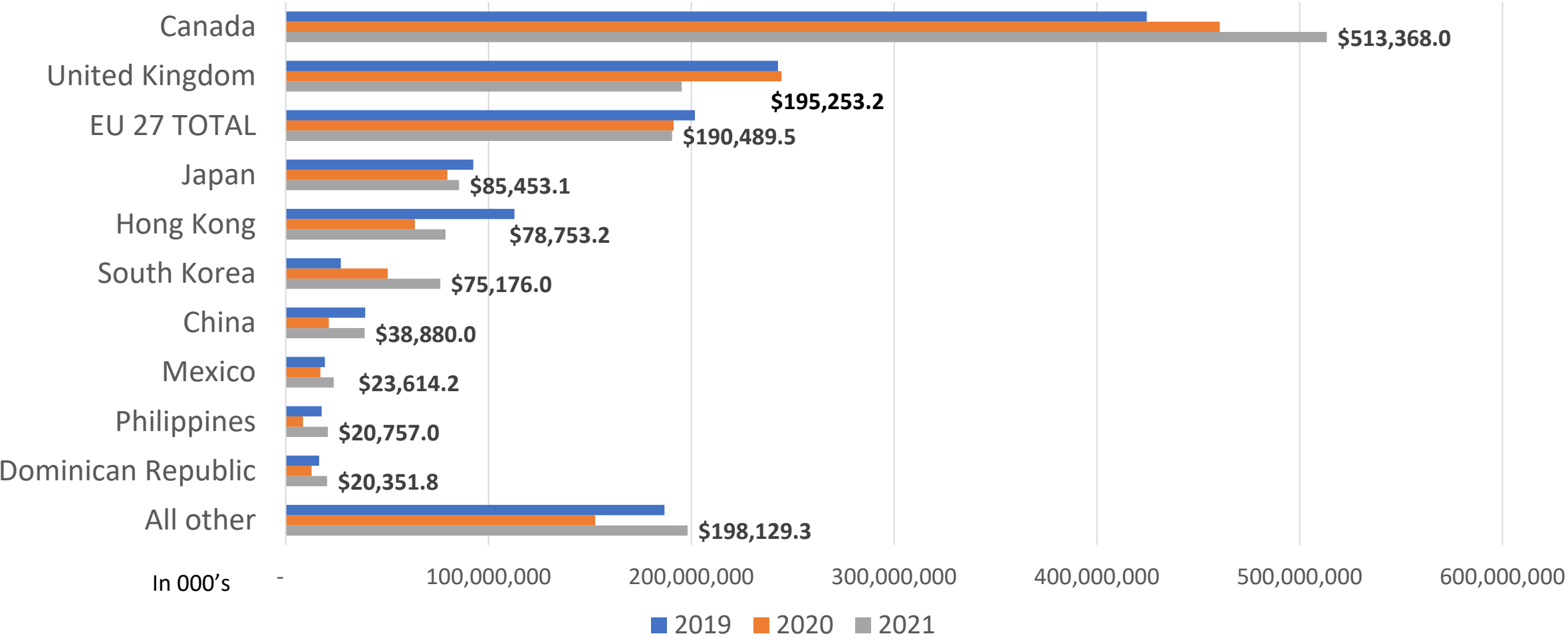
(In '000s)

2020 to 2021

US WINE EXPORTS	2019	2020	2021	Change	Change
Global	1,380,736	1,301,980	1,456,999	139,225	10.7%

- E-commerce growth
- Consumer shopping habits changed
- Benefits from other trade policies
- **Challenge:** Global Shipping Crisis

2021 US WINE EXPORT DATA – Value (USD)



US Ranks 6th in Global Exports

Steal share; Increase revenue

- California – 4th largest producer
 - Less than 4% global share of exports
 - 97% of wine sold domestically
- France - world's largest producer
 - Largest share of global exports
 - US market represents 18% of exports
- Italy - 2nd largest producer
 - 25% of total wine exports go to US

Region	Annual Exports (2021)	Global Share
1. France	\$13.3 bn	30.5%
2. Italy	\$8.9 bn	20.5%
3. Spain	\$3.6 bn	8.3%
4. Chile	\$2.0 bn	5.7%
5. Australia	\$1.6 bn	5.0%
6. US (+95% CA)	\$1.4 bn	3.7%
7. New Zealand	\$1.3 bn	3.5%

SOURCE: TRADE DATA MONITOR; US DEPT OF COMMERCE

Building Brand California



EUREKA! LONDON

June 7-9, 2022

- Inaugural launch
- Targeting Trade, Media & Consumer
- Shift perception of California category
- Lead with innovation
 - Sustainability
 - Diversity
 - Quality



Virtual Vineyard – Exploring Climate + Site

Tasting Seminar with 4D Videos

- **100 Million Years in the Making** Our state's geologic formation and the winegrowing climate it creates
- **Coastline** Coastal vineyards on the edge of a continent
- **Gaps** The Pacific Ocean's inland influence
- **Rivers & Deltas** Waterways, microclimates and soils throughout the state
- **Mountains** California's range of mountain ranges

- Paired with 8 contrasting wines from different regions

Leadership in Sustainability

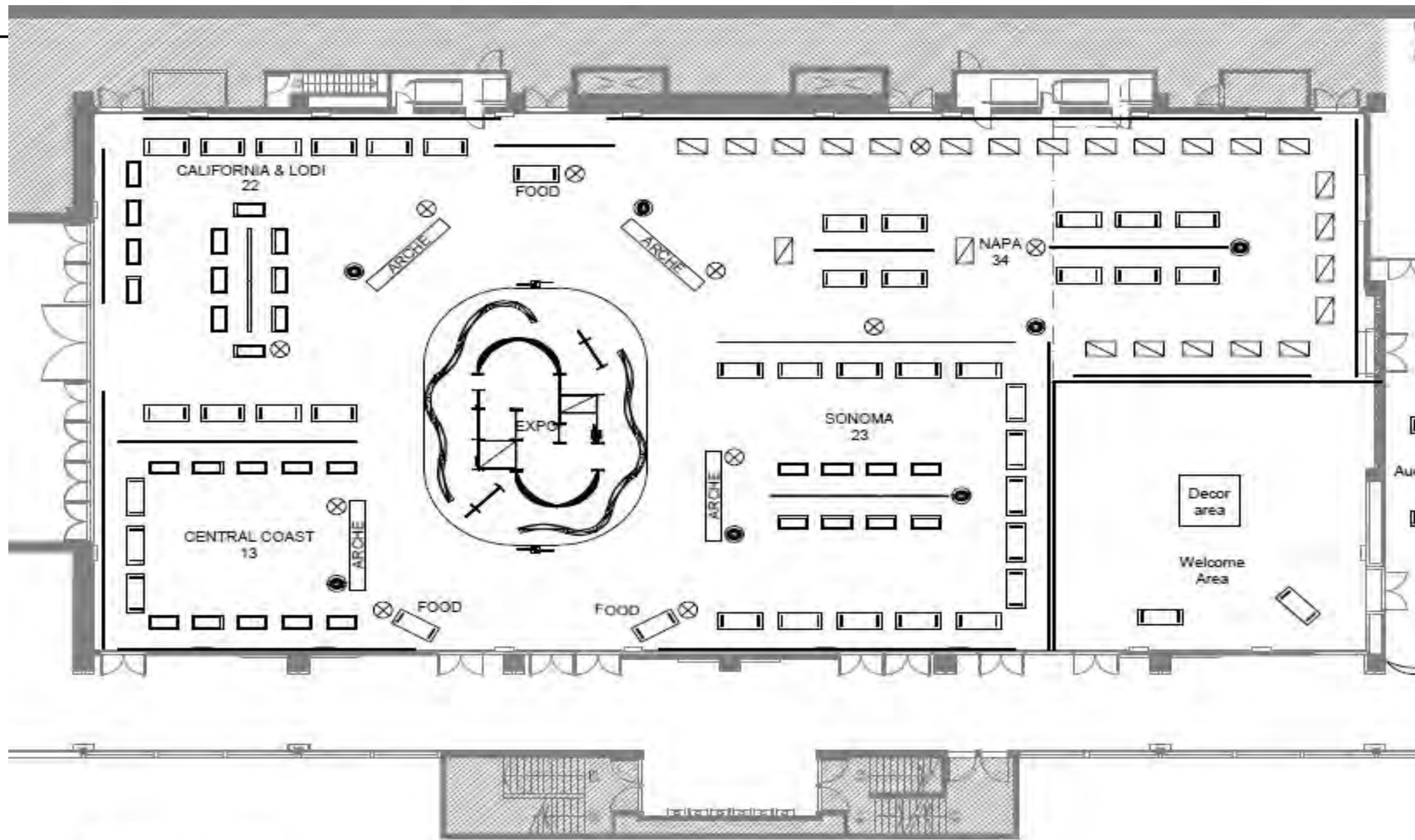


Wines on a Mission

California Wine Experience, Vancouver

March 2022





HOW DO WINERIES REDUCE AND REUSE WATER?

- Usage tracking.
- Employee training and education.
- Water ponds for biofiltration.
- Treated water reused for irrigation.
- UV light technology to sterilize equipment (aerobic).



DID YOU KNOW? Water saving and recycling practices in the winery can take the winemaking from using 38 liters of water per wine bottle to just over 11 liters.



DID YOU KNOW? Some wineries include hay bale walls in their conception, an abundant material that has natural insulating capabilities. Many also rely on renewable energy sources like wind and solar power.

- Sheep and alpacas naturally control weeds.
- Animal manure provides natural fertilizer.
- Birds of prey hunt down vine-eating rodents.
- Bats and bluebirds eat sharpshooter insects.
- Spiders, wasps and ladybugs help control harmful insects.
- Falcons chase away grape-eating birds.



SCAN ME
FOR MORE





TOM GORE
VINEYARDS

TOM GORE
VINEYARDS
& WINES

WINE TASTING


CALIFORNIA
WINES


CALIFORNIA
WINES


CALIFORNIA
WINES

Explore Sustainable California

ProWein, Germany

May 2022









Wines on a Mission

Eureka! London

June 2022



Wines on a Mission

Focus on the benefits of sustainable winegrowing

- Water
- Soil
- Climate
- Community



CALIFORNIA WINEGRAPE GROWERS AND VINTNERS ARE ON A MISSION:

To leave planet Earth better than we found it and to use viticulture to lead the way. We are the fourth largest wine producing region in the world with over half of our vineyard acreage certified sustainable. Our methods are working and working at a scale that can make a difference.



Discover Sustainable Winegrowing.

WATER

Essential. Valuable. Scarce.

SOIL

Soil is alive. We keep it that way.

CLIMATE

Adapt and advance.

COMMUNITY

Terror is people, too.



WINES ON A MISSION

SOIL

SOIL IS ALIVE. WE KEEP IT THAT WAY.

Soil is alive with living organisms, like fungi, insects and organic matter. That's how it's able to support life; that's what makes it a perfect medium for planting. Soil is its own wild ecosystem.

To keep our soils healthy, California growers are turning back to natural biological systems that reduce the need for chemicals, fertilizers and tilling. We plant cover crops to replenish the soil with nutrients and improve its capacity to store water. Healthy soils don't just produce better wine; they capture and store carbon. Treat Nature right and she will reciprocate.



Sheep help reduce the need for chemicals, added fertilizers, and even help build

The Numbers

1 MET TON

Of carbon can be a single year on a half to

3.5

Sheep help reduce the need for chemicals, added fertilizers, and even help build

WA
CALIFORNIA
WINE

ESSENTIAL

Water is needed at nearly every stage of growing grapes to bottling wine. California wineries have engineered ways to reduce water usage but also to recover natural

Drip irrigation
vine or
to even
use







Creating Opportunity



Global Buyers Marketplace

Oct 30 – Nov 2, 2022

- Hosted in Napa Valley
- 75 buyers, 20+ countries
- Focus on sales
- www.buycalifornia.wine



[About](#)

[Wine Tours](#)

[Speakers](#)

[Agenda](#)

[Wine Institute](#)

[Contact](#)

[MEMBER REGISTRATION](#)



**GLOBAL
BUYERS
MARKETPLACE
NAPA VALLEY**

Welcome to the 1st annual gathering of the best and brightest in the California wine business.

**October 31 – November 1, 2022
Napa Valley, CA**



2 Day Conference & Market

- **Two walk-around Grand Tastings per day**
- **Daily California Wine Masterclasses**
- **Winery & importer database**
- **Online networking platform to schedule meetings & follow-up**
- **Winery hosted dinners**
- **Flights & accommodation included**



**GLOBAL
BUYERS
MARKETPLACE**
NAPA VALLEY

Speakers



Elaine Chukan Brown

Elaine Chukan Brown serves as the U.S. Executive Editor for JancisRobinson.com, and as Contributing Writer to Wine & Spirits Magazine. In 2019, the Wine Industry Network named Brown one of the 9 Most Inspiring People in Wine, and she was named by the International Wine & Spirits Competition and VinItaly as one of five of the top Wine Communicators of the Year in the world.



Kelli White

Kelli A. White is the Director of Education for the Pacific Union Company in Napa Valley. Most recently, she was the Senior Staff Writer for the educational nonprofit GuildSomm, where her work earned her two of the coveted Louis Roederer International Wine Writing Awards.

Wine Region Tours

Following the conference in Napa Valley, guests are invited to discover California's signature wine regions by joining optional three-day tours. Each tour will feature winery and vineyard visits, regional tastings of legendary wines, and meetings with winery principals.



Sonoma County

Sonoma has many distinctions, but here's one to note: it grows more Pinot Noir than any other county in the state. Gourmet farm and vineyard dinners are common here, an expression of the area's great wine, homegrown culinary culture, and love of the great outdoors.



Anderson Valley

Foggy, cool and moody, the Anderson Valley is nestled among the redwood forests of Mendocino County. The region is known for its stellar, low production Pinot Noir and for the sparkling wine houses that make it a bubbly paradise.



Santa Cruz Mountains & Central Coast

One of California's first AVAs, the Santa Cruz Mountains' growing area is rich with wooded peaks and small vineyards tucked into quiet hillsides. South of San Francisco, the region is known primarily for Pinot Noir, Chardonnay and Cabernet Sauvignon, and it falls within the larger Central Coast region, which stretches south for 500 kilometers (300 miles).

CALIFORNIA WINES EXPORT WEBSITE

Launch Date: July 2022

NEW APPROACH

- Global resource for wineries and buyers to do business with California Wines
- Make resources accessible and user-friendly
- A key tool for CA Wines membership
 - Winery & Importer database
 - Enhanced Member Communications
 - Event Calendar
 - Event Recaps/ Success Stories
 - Winery Forum

