



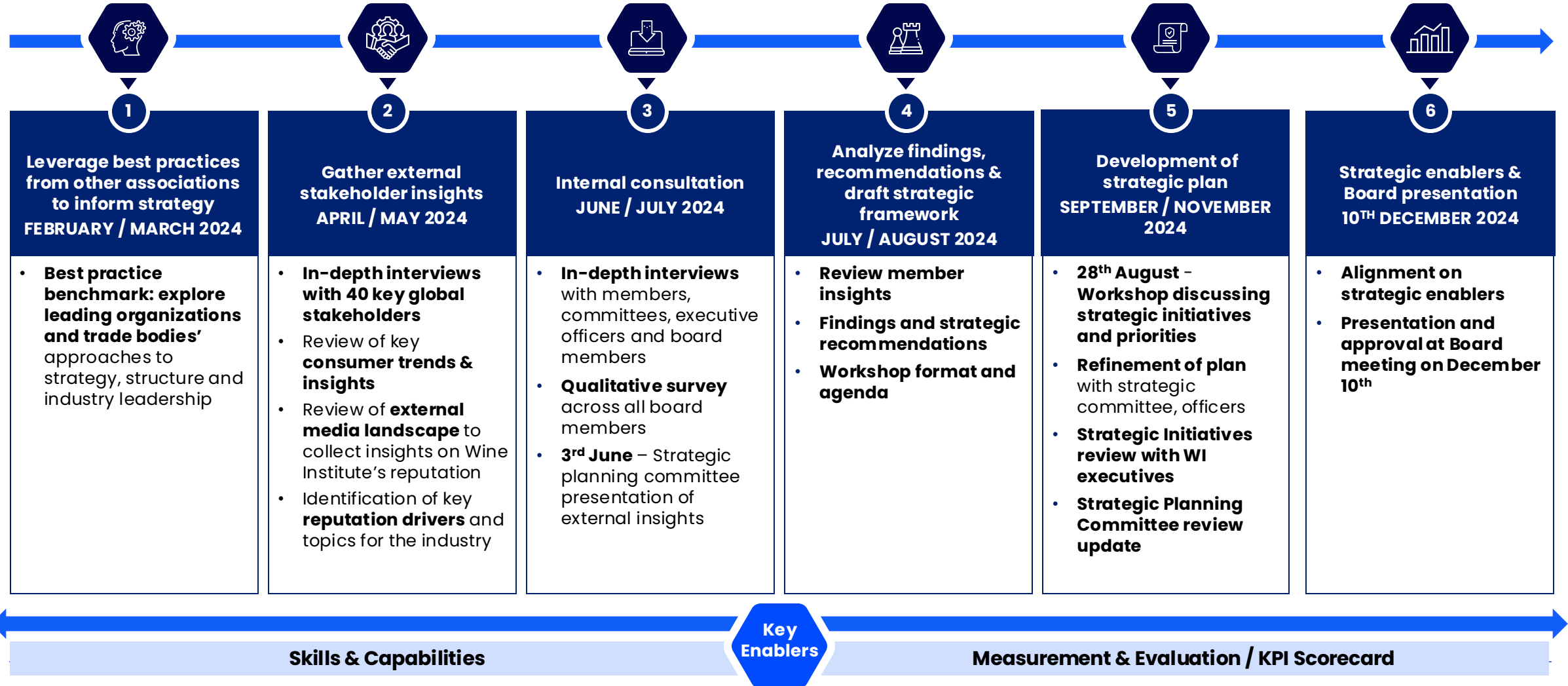
Wine Institute

5-Year Strategic Plan

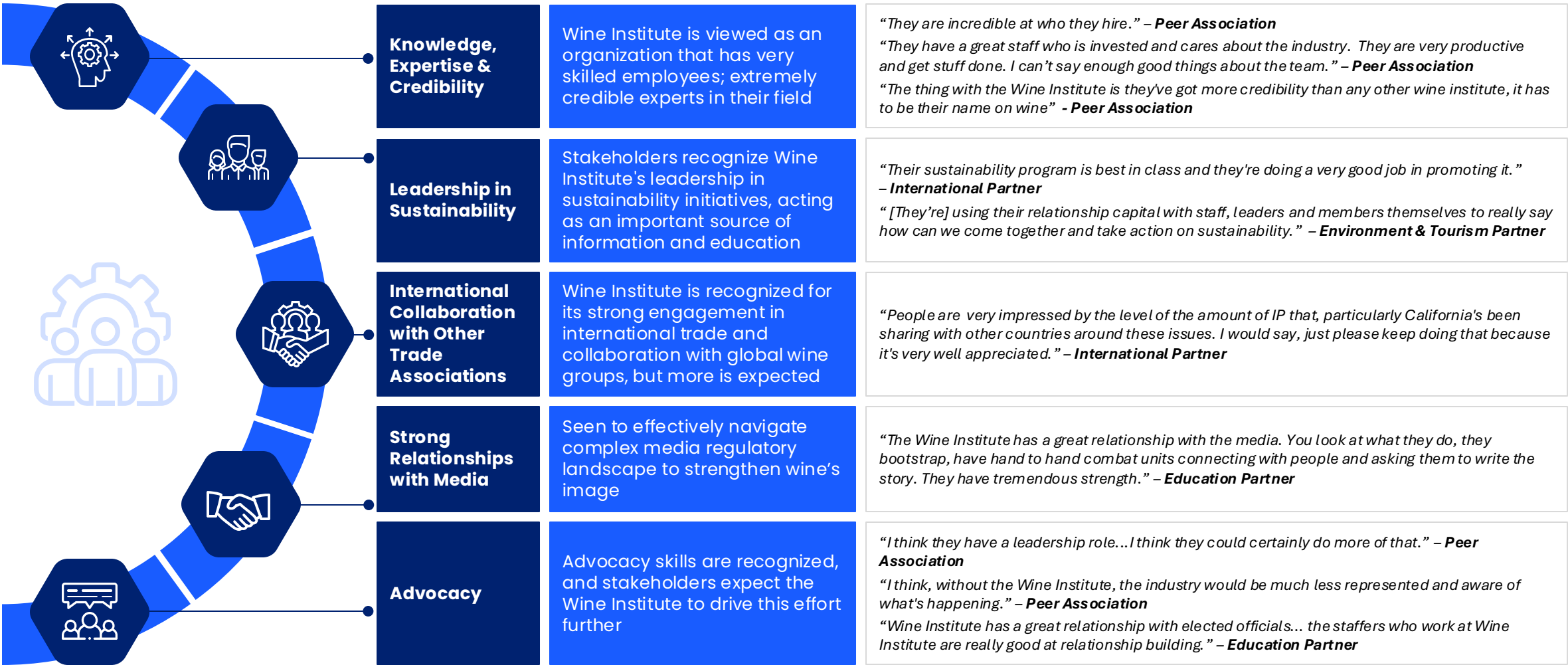
2025-2029

5-Year Strategic Plan

Rooted in thorough *intelligence and collaboration with WI members*



The Wine Institute is very highly regarded by its stakeholders, and they expect the organization to leverage its strengths even more



Vision

Wine Institute will be the premier voice effectively representing wine worldwide

Mission

To initiate and advocate public policy that enhances the ability to responsibly produce, promote and enjoy wine

5-Year Strategic Plan on a Page



Protect the Sector

Regulatory & Tax

- **Protect and promote sector from unreasonable regulatory measures** at federal, state, and international levels
- **Advocate for fair taxation and trade practices**
- **Lobby** for reasonable labelling, packaging and EPR requirements

Public Policy & Advocacy

- **Address industry-wide challenges** representing interests of all members aiming to promote industry growth
- **Oppose legislation** that could harm the industry, and policies and practices that would give undue advantages to others at the expense of wine producers
- **Encourage and facilitate collaboration across different wine-producing regions** to unify and amplify the industry's voice
- **Continue to strengthen alliances** with wine industries in other countries to address common challenges and enhance global market presence

Regulatory & Wine Dialogue

- **Be a leading, credible voice in current and upcoming regulatory and wine dialogue conversations**
- **Use communications initiatives such as *We Grow Wine*** to highlight the unique and positive aspects of wine while differentiating it from other alcohol beverages
- Protect industry by **assessing and managing risk** in approaches to advocacy and wine dialogue
- **Provide an educational platform** offering resources for members to talk about wine as part of a balanced lifestyle through a unified narrative
- **Build coalitions / work collaboratively with spirits, beer and other industry partners** to strengthen lobbying efforts and create a unified voice, addressing global, no-safe level narrative, when interests align
- **Address claims about wine issues** with **key policymakers (not consumers)**



Promote & Grow the Sector

Positive Sector Impact

Be a leading, visible, and proactive voice in California, the US, and abroad by demonstrating the sector's positive impact among trade, government, and consumers. Focus on:

- Broad economic impact
- Commitment and continued leadership in sustainable agriculture
- Commitment to sustainable business practices
- Social and community impact

Market Expansion & Access

- Continue to improve **market access internationally**
- Expand **market access in key markets** as identified in the 3-Year Export Strategy Plan

Grow Sector Appeal & Market Share in the US & Abroad

- **Establish a clear and consistent global positioning and communication platform** for California wines, easily accessible for members to use
- **Encourage consistent use of the positioning platform by members**, leveraged through communication opportunities and tools



Unite & Inspire the Sector

Organizational Structure

- Enhance collaboration and communication with and amongst members
- Ensure the structure moving forward is fully aligned to strategy, objectives and needs
- Align succession planning to structure for all roles
- Review goals and objectives for leadership teams to align with strategy, structure and budget
- Agree ways of working to enhance pace, agility and visibility

Membership Commitment & Engagement

- Recruit new and retain existing members
- Create onboarding principles for members
- Demonstrate **Value & Impact** of membership
- Increase attendance and engagement
- Encourage younger generations to participate in Wine Institute
- Review committees to drive Wine Institute goals
- Ensure all members, regardless of size, have their voices heard

Critical Enablers

Measurement & Evaluation (M&E)

Structure / Skills & Capability

Governance

Funding

Detailed Plan

Priorities & Initiatives

Protect the Sector

Regulatory & Tax

- **Protect and promote sector from unreasonable regulatory measures** at federal, state, and international levels
 - **Advocate for fair taxation and trade practices**
 - **Lobby** for reasonable labelling, packaging and EPR requirements
-

Public Policy & Advocacy

- **Address industry-wide challenges** representing interests of all members aiming to promote industry growth
 - **Oppose legislation** that could harm the industry, and policies and practices that would give undue advantages to others at the expense of wine producers
 - **Encourage and facilitate collaboration across different wine-producing regions** to unify and amplify the industry's voice
 - **Continue to strengthen alliances** with wine industries in other countries to address common challenges and enhance global market presence
-

Regulatory & Wine Dialogue

- **Be a leading, credible voice in current and upcoming regulatory and wine dialogue conversations**
- **Use communications initiatives such as *We Grow Wine*** to highlight the unique and positive aspects of wine while differentiating it from other alcohol beverages
- Protect industry by **assessing and managing risk** in approaches to advocacy and wine dialogue
- **Provide an educational platform** offering resources for members to talk about wine as part of a balanced lifestyle through a unified narrative
- **Build coalitions / work collaboratively with spirits, beer and other industry partners** to strengthen lobbying efforts and create a unified voice, addressing global, no-safe level narrative, when interests align
- **Address claims about wine issues with key policymakers (not consumers)**

Strategic Initiatives



Regulatory & Tax

Regulatory: Protect Sector at Federal, State, and International Levels

- Engage with upcoming **TTB rulemakings** on nutritional, ingredient and allergen labelling
- Provide **real-time updates and analysis** on meaningful and material legislation and regulatory changes
- Inform members on **labelling standards**, including aligning with upcoming EU requirements
- Offer **resources and guidance** to help members navigate international trade laws and regulations (e.g., EU labelling)
- Inform and engage members on **EPR, recycling legislation and regulations**
- Protect industry from attacks on **tied house** laws, expanded monopoly protection laws, and other inter-tier challenges to protect against increased costs and restrictions to market access
- Engage in **environmental and labor law legislation** to improve when possible and minimize harm at a minimum (e.g., legislation to **reduce wildfire risk, water regulation**)
- Be **the voice for California wine and US wine sectors** in key regulatory and policy forums

Tax: Lobby for Fair Taxation

- Prevent the expansion of Public Health influence in calling for any **earmarked excise tax** increases
- Prevent efforts to reclassify **gallonage taxes** as “by the drink” taxes
- Ensure broader **tax legislation** does not make changes to CBMA or negatively impact state wine taxes



Public Policy & Advocacy

Public Policy

- Actively participate and engage in legislative processes to influence **policy developments** that affect the wine industry
- Actively review and provide **comprehensive analyses** of proposed legislation or regulations substantially impacting the industry
- Secure **federal funding** (for example, but not limited to, USDA smoke exposure research, wildfire and disaster recovery programs)

Advocacy

- Continue **building relationships** with government and **industry-relevant stakeholders globally** to enhance influence and address industry challenges
- Assess the **involvement of WI in key domestic and international organizations**
- Address efforts by distilled spirits producers to promote **“alcohol equivalency”**
- Leverage **DTC opportunities**
- Fund, publish and communicate **impact reports annually**



Regulatory & Wine Dialogue

Regulatory & Wine Dialogue

- Communicate with government, **addressing misinformation on no-safe levels**
- Build **new communications tools based on We Grow Wine** highlighting that wine is an agricultural product that is grown
- **Develop wine dialogue messaging, narrative**, and communications and engagement plan for use by all members and WI
- Advocate for **harmonized and modern standards in labelling**
- Ensure the next edition of **DGA** includes alcohol recommendations based on a clear preponderance of available scientific evidence
- **Continue to offer platforms and opportunities to engage with other industry groups**, when interests align

Promote & Grow the Sector

Positive Sector Impact

Be a leading, visible, and proactive voice in California, the US, and abroad by demonstrating the sector's positive impact among trade, government, and consumers. Focus on:

- Broad economic impact
 - Commitment and continued leadership in sustainable agriculture
 - Commitment to sustainable business practices
 - Social and community impact
-

Market Expansion & Access

- Continue to improve **market access internationally**
 - Expand **market access in key markets** as identified in the 3-Year Export Strategy Plan
-

Grow Sector Appeal & Market Share in the US & Abroad

- **Establish a clear and consistent global positioning and communication platform** for California wines, easily accessible for members to use
- **Encourage consistent use of the positioning platform by members**, leveraged through communication opportunities and tools

Strategic Initiatives



Positive Sector Impact

- Develop a **California Wine Impact report and communicate it proactively, such as using PR opportunities**, to key stakeholders, customers and consumers

Sustainability Leadership

- **Reassess all sustainability programs & projects to prioritize** and determine which programs to prioritize, which ones are not part of WI and/or CSWA scope, and where WI members can play a bigger role such as:
 - CSWA grant and contractual projects
 - Green Medal sustainable winegrowing leadership awards
 - US Sustainable Winegrowing Summit
- **Advocate for recognition of California certification programs** to meet marketplace expectations
- Leverage **equity in sustainability to enhance reputation**

Sustainable Business Practices / Social Impact

- Articulate how **existing initiatives help ensure long-term industry viability**
- Assess if (and which) **social impact initiatives** should be undertaken to build leadership of sector in tackling social impact issues

Economic Impact

- Enhance **communication of sector economic impact** among key stakeholders leveraging existing data and reports



Market Expansion & Access

- **Ensure California Wines Export Program* conveys** strategic priorities that align with Export Program members' objectives including:
 - **Complete Three-year strategic plan** including long-term vision and goals for the California Wines Export Program (by December 2024) **
 - **Available funding sources and plans** to secure additional funding
 - **Identify priority markets, programs, and resources** to develop export opportunities
 - Recruitment and retention strategies to continue to grow **Export Program membership**
 - **Update and review three-year plan biannually**
- **Advocacy team specifically:** advocate for the removal of tariff and non-tariff barriers in targeted export markets
- Continue **existing partnerships** and strengthen **relationships** with domestic and global wine organizations and relevant government stakeholders

* The California Wines Export program is open to all wineries that sell California wines, regardless of Wine Institute membership and is governed by a 12-person Executive Committee that is comprised of Export Program members who actively participate in programs around the world. The committee includes a diverse representation of small, medium and large wineries from various regions as well as brokers. Each committee member is nominated and approved by current Export Program members.

**Three-Year Export Strategy Plan will be shared in February 2025 to program's members for feedback and completion



Grow Sector Appeal & Market Share

- **Use the learnings from research, test markets (completed) and blitz pilot** (KPIs to be agreed) to develop a toolkit – assets/data to act as united narrative for members
- Create a consistent **narrative aligned to the Cultivating Togetherness & We Grow Wine initiatives** for California wines rooted in its uniqueness, culture, heritage, social & economic impact and sustainability leadership, that can be easily adopted by members
- **Create new communication platforms for members to utilise** and build awareness, elevate image, and increase value of California wines with consumers, policy makers, trade and media globally
- **Facilitate and assist members to leverage platforms** (including resources, insights, knowledge, messaging, communication tools)
- Leverage **new communications channels and partnerships such as social media / influencers / celebrities / food and lifestyle brands** alongside traditional media efforts
- **Facilitate non-competitive information sharing** among members on sector-wide topics such as market / consumer trends

Unite & Inspire the Sector

Organizational Structure

- Enhance collaboration and communication with and amongst members
- Ensure the structure moving forward is fully aligned to strategy, objectives and needs
- Align succession planning to structure for all roles
- Review goals and objectives for leadership teams to align with strategy, structure and budget
- Agree ways of working to enhance pace, agility and visibility

Membership Commitment & Engagement

- Recruit new and retain existing members
- Create onboarding principles for members
- Demonstrate **Value & Impact** of membership
- Increase attendance and engagement
- Encourage younger generations to participate in Wine Institute
- Review committees to drive Wine Institute goals
- Ensure all members, regardless of size, have their voices heard

Strategic Initiatives



Organizational Structure

Structure & Organization

- **Regularly review WI staff structure** and align structure with core priorities
- Ensure **succession planning** in place for all key roles
- **Review goals and objectives for leadership teams to align with strategy, structure and budget**
- Ensure all staff, **primarily based in California and in the office**, clearly communicate outcomes and impact of their work

Communication

- **Improve the accessibility, succinctness, and engagement** of information shared internally, including quantifying savings to the industry on the regulatory front
- Information shared to be targeted to members' **business challenges**
- Create a **member portal** offering real-time industry data and insights
- **Leadership, including the CEO, to increase face-to-face interactions in California** and direct communications with members to better understand their needs and address internal alignment



Membership Commitment & Engagement

Membership Commitment

- **Members commit to attend** at least 2 board meetings / yr (send alternate if unavailable)
- **Define responsibility** of the "alternate"
- Create a **set of expectations / rules of engagement** for members of Wine Institute
- Develop a culture that fosters **participation of younger members in leadership roles** to ensure the future direction of WI aligns with the needs and perspectives of the next generation

Membership Engagement

- WI to hold meetings in venues that all members can easily access and afford, to **drive attendance and ensure all members of all sizes can participate in discussions**
- **Onboard** new members (new staff within member organizations)
- Ensure the **organization's actions and impact** are **well understood** by all members

Governance

- Review **existing committees** and assess whether they should be adjusted
- **Review committee structures** to determine ways to ensure **faster decision making**
- Redefine **ex-officio lifetime membership** principle