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## Abbreviations

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>French: Abbreviation</th>
<th>English: Description</th>
</tr>
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<tbody>
<tr>
<td>AOC</td>
<td>Appellation d’Origine Contrôlée</td>
<td>Controlled Denomination of Origin</td>
</tr>
<tr>
<td>FDI</td>
<td>Foreign Direct Investment</td>
<td></td>
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<tr>
<td>NW</td>
<td>New World</td>
<td></td>
</tr>
<tr>
<td>OIV</td>
<td>Organisation Internationale de la vigne et du vin</td>
<td>International Organization of Vine and Wine</td>
</tr>
<tr>
<td>OW</td>
<td>Old World</td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>United Kingdom</td>
<td></td>
</tr>
<tr>
<td>USA</td>
<td>United States of America</td>
<td></td>
</tr>
<tr>
<td>VDQRD</td>
<td>Vins de Qualité Provenant de Régions Déterminées</td>
<td>Quality Wines From Specified Regions.</td>
</tr>
<tr>
<td>VDQS</td>
<td>Vin Délimité de Qualité Supérieure</td>
<td>Delimited Wine of Superior Quality</td>
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Global Wine Industry Competition: The New World Against the Old

Introduction

Current international competition existing in the global wine industry largely divides the world market between New World (NW) and Old World (OW) producers. This characteristic of the industry leads to not only fascinating literature review, but also provides ground for an interesting comparative study. Having the basic approach of comparing competitive moves, responses and results of NW and OW producers, this research project will concentrate on case studies from NW and OW countries and additionally provide critical evaluation of literature.

The case studies for the OW will also be the two largest European producers, France and Spain. These countries are often referenced as admirable OW producers based on their long and uninterrupted history of winemaking. Conversely, countries outside the boundaries of Europe that represent the NW will also be two largest producers, the United States of America and Australia; both of which are moreover well-established.

Reviewing available literature about the current position of each case study with respect to the international wine industry, together with the underlying reasons that led to the formation of present conditions, will enable background for proper comparison of the case studies that are inclusive of competitive steps and strategies, which will help to identify key factors for success or failure in the global wine industry. The article also will demonstrate the gaps and limitations of existing studies, which can be filled by the research.
Following comparison of the case studies, recommendations and direction for future research will be provided. Given the dynamics of the wine industry in the era of globalization, prospects for growth will also be covered.

**Old World Wine Producing Countries**

This section will review France and Spain, traditional and historical OW wine producing countries, which have significant international market presence. Quality control measures in each case study as well as issues associated with the wine sector specific to each country will be covered as well.

**France**

“For many, when they think of wine they think of France”1.

Ancient history and experience of wine-making created the famed and exceptional perception of French wine as the etalon of quality. This is the advantage that NW wine producers cannot boast. However, the world’s most powerful wine brands still come from USA and Chile (Anderson, 2017), creating solid questions about how properly the country is using its competitive advantages. The fact is that famed reputation alone is not preventing the French wine industry from weakening its position in international markets2. This indicates the crucial importance of quick and effective responses and adaptation to environmental changes.

In *The French Wine Industry and International Markets* (Auriol, et al. 2004) emphasis is placed on the crucial importance of quality-related trends and discusses the French quality control system in detail. According to the authors, French quality regulations, dating back to 1855, is strongly related to concept of “terror” (Ibid). This is the

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combination of natural factors such as the quality of soil, climate, and location of vineyards (Ibid). Basics of the French regulation system represents quality categories such as the famous *Appellation d’Origine Contrôlée*³ (AOC), which is the highest and most admired standard produced. This category is followed by *Vin Délimité de Qualité Supérieure*⁴ (VDQS), which guarantees superior quality of wine that is produced in a traditional manner in one of the famed wine regions of France⁵. A very important fact outlined in the study is the merger of these categories as an attempt to make the French regulatory system more flexible. As a result, the third quality category *Vins de Qualité Provenant de Régions Déterminées*⁶ (VDQRD) was created to be inclusive of quality wines under less strict regulation systems than those for AOC and represented intermediate quality wines⁷.

According to the work, this was referred to as the “competitive step”, as a result of increased pressure from NW producers, who were trying to switch focus of international markets from traditional “terror” to the quality provided by modern technology of production (Auriol, et al. 2004). However, there are a number of potential drawbacks from this action on French quality regulations that must also be mentioned. Firstly, this could contradict the quality trend of the global industry, keeping in mind that market for intermediate quality wines are becoming smaller. Secondly, the fact that receiving VDQRD is less complicated than AOC tempts companies producing the high-quality wines to apply for former regulation rather than the latter, in order to get access to international markets quicker. This obviously threatens the valuable perception of French premium wines.

³ English translation: Controlled Denomination of Origin.
⁴ English translation: Delimited Wine of Superior Quality.
⁵ These would be inclusive of Alsace, Bordeaux, Burgundy, Beaujolais, Champagne, Côtes du Rhone, Jura, Languedoc, Loire Valley, Médoc, Provence, and South-west.
⁶ English translation: Quality Wines From Specified Regions.
Spain

Possessing the largest vineyard area in the world at 1.1 million hectares (France and Italy each at 0.9), Spain represents another important OW producer in the contemporary global wine market. The third largest producer accounts for around 4.2 billion liters of wine annually and as domestic wine consumption reaches only less than half of its production, Spain is a major exporter of wine. Unlike other OW producer countries, Spanish exports are steadily increasing. Pierre Mora (2015) emphasizes the distinguishable openness of the country towards foreign trade, attracting substantial amounts of foreign investment, as the one of the reasons for the aforementioned stability of industry growth.

It is assumed, that the first systematic cultivation of grapes for wine took place between and the south of the Black and the Caspian seas, marking the modern state of Georgia, around 8000 years ago\(^8\), production knowledge spread gradually spread to the rest of the world. Major points in ancient wine geography included the southern portion of the Iberian Peninsula or modern day Spain by 2500 BC\(^9\). By underlying the ancient history of Spanish wine, I intend to present importance of a cultural bond to winemaking and potential of its usage as a sustainable competitive advantage on the international market.

According to “Wine Routes in Spain: A Case Study” (López-Guzmán, Sánchez, and García 2009), assertions are made noting that winemaking in Spain is much more than just a productive activity, based on the high level of integration in the overall culture of the country. But a question remains – How is the country using its historical experience and traditional techniques of wine making to maximize its potential of attracting cotemporary experiment-oriented consumers? There is an obvious lack of concentration

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in the marketing of Spanish wines concerning its historical experience and consequently there are few consumers knowledgeable of Spain actually being an older wine-producing area than France.

Mike Veseth (2017) in “Sketches of Spain: Spanish Wine Industry Challenges and Opportunities” outlines a number of interesting features of country’s industry. It is asserted that Spanish wine, as suffering from perception that much of their wine is middle quality or is not suitable for the international palate. Moreover, scandals involving fraudulent labelling are covered, which is certainly an extremely difficult reputation to mend.

By attentively analyzing such trends, it can be concluded on a number of competitive strategic steps that an obvious focus on improving quality and control measures to ensure consistency can improve the perception of Spanish wines. Also, encouragement of combining tradition and innovation-based methods can assist in marketing as well as securing potential pathways for future development. Another would be accessing greater sales in the USA, being one of the largest markets in the world. Identifying gaps in the market, such as white versus red wine sales, and attempted to fill the vacancies with their own product(s), Spain possesses enormous potential.

**New World Wine Producing Countries**

NW wine producers are referred as the countries outside the Europe, which lack the long history and traditions of winemaking. In spite of this fact however, the NW wine producers have succeeded in taking opportunities presented by global wine industry and now represent the main challenging forces against countries that have historically enjoyed status as worldwide industry leaders. With this taken into consideration, the two NW heavyweights of the USA and Australia will be reviewed as case studies.
**United States of America**

Being the fourth largest producer of wine in the world, the USA is considered as success story in branding, developing, and internationalizing its wine industry. It represents the fastest growing market and reportedly has a population that spends more on a bottle of wine than any other market. Indeed, the beverage industry in the USA has been viewed highly fragmented, with divisions representing regionalized palettes. But, the potential of an already successful wine industry that can grow even further has been noted and studied, being expressed as the following: “Converting more Americans to wine from other spirits has great potential. If 10% of beer purchases were substituted with the same volume of wine the US wine market would double,” (Cholette, Castaldi, and Fredrick 2004).

Yet, how was a NW wine producer like the USA able to achieve international acclaim? American wine expert, Larry Walker, has described the year of 1976 as the turning point for the USA wine industry (Walker 2006). This was the point in which American wines upstaged the French wines at the blind testing in Paris, receiving the high scores from international wine critiques (Ibid). Positive feedback from famous critiques were used effectively in marketing different wines internationally. Hence, global competition was initiated on a platform that was marketable via newness in upstaging previously revered OW wine producers as well as providing for a curious and experimental international audience.

According to “Competition in the Global Wine Industry: USA Perspective” (Silverman, et al. 2002), an interesting paradox of gaps between domestic and international achievements of a country’s wine industry is emphasized. The authors explain the phenomena by low strategic focus on international markets, arguing that in the past the common strategy for the US wineries was to export wines that exceeded capacity due to overproduction (Ibid). But, obvious opportunities offered to a developing international wine industry and threats, in case of ignoring global trends, encouraged the industry to
create a specific initiative called “Wine Vision”. The organized approach to structural changes was expressed by creation of the vision and should be duly noted as an overall unifying factor. Characterization of “Wine Vision” can be described as an initiative having the approach of assisting non-exporting wineries in becoming exporters along with improving export capacity of currently exporting wineries (Ibid). Despite the fact that “Wine Vision” has cooperation with large number of wineries around the world and winery associations, it must be noted that there is lackluster energy on behalf of wineries for more active participations. The lack of urgency in “Wine Vision” participation potentially opens wineries to being more vulnerable and susceptible to the negative economic impacts of globalization and other competitive forces.

But, while this is a potential issue for wineries to address and while some have already felt such negative impacts, the USA sector has been seemingly less susceptible to such effects. In fact, international wineries are increasingly looking towards the USA for expansion given its accelerated sector growth potential.

Nonetheless, USA wines are in demand and have been regarded as among some of the best in the world, dethroning OW wine producers from top positions. Increased international exports and ensuing market competition is expected, but this is also taken in stride with other wineries seeking to enter the USA market as well.

Australia

Australia has often been referred to as a leader in NW wine producers, successfully challenging solid market norms and positions of OW wine producers. Production in the country dates back to 1788 and until the late 1980s was a small international player, accounting for less than 1% of the world’s wine production (Global Wine Market 2015). On the other hand, the last decade has seen a huge transitional period for the Australian wine industry and as a result, the country has achieved status of being the sixth largest exporter of wine in the world (Ibid).
Such outstanding success has attracted many researchers from different fields, with the purpose of theoretical rationalization for successful domestic and international performance in order to provide the useful practical implications for other products.

A study demonstrating the clarity in analyzing critical changes in the transformation of the Australian wine industry was conducted to explain the success rate as well as identify points of sustainability (Marsh and Shaw 2000). The study outlined that at first, producers adopted a globally-oriented business mindset by projecting their prospects in an international context (Ibid). Naturally, this would be a beneficial approach given that the Australian market is much smaller than one in a global setting. The next criteria was critical and concentrated on marketing, with the goal of becoming market-led and not producer-led. A third criteria fulfilled would be a significant focus on advancing the domestic innovation and practices within the wine industry. A commitment to innovation resulting in the creation of important competitive advantages in technical developments was adopted as an ethos for every winery within the country, which eventually would prove to be a key factor in safeguarding quality and securing an admirable international reputation. Industry investments in research and adoption of findings in production enabled Australia to challenge the global wine market through its own business performance and led to a positive pattern of success.

“Strategy 2025’ released in 1996, is called as the model of collaborative industry development, which was essential to mobilize producers. It translated aspirations from the clouds into the practical realm of self-interest – individual producers could calculate what it could mean for them. For these latter stakeholders, the industry vision reinforced confidence about its professionalism and capabilities, and its credibility. This was the result for deliberately orchestrated move (pp.158).”

A clustered and collective approach to overall wine industry development by Australian producers is clear and apparent. Having established highly interlinked
industry associations including, the Winemakers’ Federation of Australia\textsuperscript{10}, Australia Wine and Brandy Corporation\textsuperscript{11}, and Grape and Wine Research and Development Corporation\textsuperscript{12}, the country has demonstrated a high level of consolidation within the industry. Marsh and Shaw (2000) outline that these associations divide up the tasks of strategy, marketing, and research and provide the platform for further proposals for common actions.

Marsh and Shaw summarize the benefits of consolidation by stating that it can leverage their capabilities and reduce the costs of gathering information about the target markets, working out the priority markets, followed by marketing and research and development costs (Ibid).

With such success, would there be any negative impacts occurring simultaneously? Jordan, Zidda, and Lockshin (2007) addressed such a concern in their study, “Behind the Australian wine industry’s success: Does environment matter?”. The study investigated the external environment of Australia and its main OW rival, France. It created the precedent of an important comparison in order to find out to what extent the country contributed to industry success in competing with its rival (Ibid). Interviewing and comparing four wineries, two Australian and two French, the study distinguished differences regarding market, strategic, innovative and entrepreneurial orientations and in inter-organizational collaboration (Ibid). Australian wineries proved to have a higher level of market orientation, more inter-organizational collaboration, more export activeness and better entrepreneurial and innovative environments (Ibid). The study distinguished two specific external factors that led to Australia’s higher success rate. The first was the national wine legislation and the second was an inter-organizational collaboration. The research discovered that Australian wineries consider

\textsuperscript{11} “Australia Wine and Brandy Corporation” was renamed to “Wine Australia”.
\textsuperscript{12} “Wine Australia” merged with “Grape and Wine Research and Development Corporation” to become the “Australian Grape and Wine Authority” in 2014.
their wine legislation system less strict than their rivals, which gives them an advantage.

An important assumption of the research was that the Australian wine industry is more market oriented than the French one, which emphasized the significant determinant of business performance (Ibid). The study states that, “because Australian wine history is much more recent than French wine history, Australian wineries are expected to be less traditional and more market/marketing oriented than their French competitors, who focus more on the product than on the market” (Ibid).

With regards to global competition, it can be regarded that Australia employed effective academic theoretical frameworks to boost success on the international scene. More specifically, application of generic strategies formed by Michael E. Porter (1980) and hypercompetition based on the work by Richard A. D’Aveni (1994) can be seen in the case between France and Australia wine competition. For example, France exported premium wines to the United Kingdom (UK) and USA markets, which created a sharp rise in the price for premium wines, hence successful application for Porter’s differentiation strategy to take hold (see Porter 1980); meaning that Australia could penetrate such markets by establishing themselves as different. In order to be present in the markets, it would also require that product be available in great quantity. Therefore, Australia during this period increased volume and a rise of wine exports to the UK and USA. But, this was done without an average price increase, which provided evidence of cost leadership strategy (Ibid), enabling a price factor to be emphasized for consumers. Confirming an increase in pressure through both differentiation and cost leadership strategies, D’Aveni’s hypercompetition framework ultimately led to value and profitability weighing in favor of Australia (D’Aveni 1994).

At present, Australia remains a NW wine producing competitor that can actively participate on a global scale.
Success Factors and Flaws

There are success factors shared between NW and OW producers that can firmly be seen and others that are more case-specific. There are also flaws present in frameworks and practices that should be taken note of as no model is perfect.

In the case of France, there are challenges that the country must address despite its previous successes. While possessing a historically admired reputation, the country must recognize that there is growing international competition. France has an appellation system that can sometimes be viewed as bureaucratic given its basis in geography rather than species variety. Although this can be arguably viewed as a positive notion of its appellation system, variety does hold weight too. Indeed, reputation has been earned over time, but it should not be overemphasized, particularly with the growing number of competitors. A lack of domestic market growth potential can also be viewed as a flaw, but is only resultant from its previous successes. It is in fact due to its successes that the possibility for attracting foreign investment is unlikely and could work against the country if budgeting becomes an issue or if sales do not match with demand.

In the case of Spain, foreign investments has been a success factor in the continuity and growth of its domestic wine industry. However, a major flaw would be with an ineffective marketing strategy and lack of global presence on par with other countries. Spain also struggles to live up to the same revered reputation as neighboring France for having a lengthy viticulture, despite it being older. This is particularly tragic, especially considering that it could be capitalized on with relative ease.

In the case of the USA, the domestic wine industry provides a number of important success factors that should be taken note of. One such factor would be an organized approach to structural changes by developing overall “Wine Vision” involving basic aspects of the industry. Another factor would be useful labelling practices that indicate
percentage of variety and play very important role in the consumer purchasing
decision, especially when referring to popular or unique varieties. Close cooperation
with universities concerning research and development is another factor of success that
the USA has used to its advantage along with cooperation with world famous critiques
and effective usage of their positive feedback in profitable marketing strategies.
Leadership, dedication and commitment, as well as readiness to learn through
experimentation summarize factors of the USA wine industry, which would benefit
other countries as well.

Success factors for Australia include a clustered approach to industry development,
meeting the trend of overall consolidation, innovation and establishment of own
business performance patterns, application of such patterns to global competition, and
constant reforms within the industry that create positive derivatives such as oenology
foundations and associations. Australia is a challenging force in the global wine market
and will remain as such with its effective frameworks in place. Unlike other OW
producers, Australia is more market-oriented and strategically inclined.

New challengers sometimes win. NW producers challenged OW producers and
dethroned the latter from their highly revered positions through faster response times,
quantity-oriented sales tactics, and adaptation to global wine trends. As a result of the
competitive steps taken and responses produced, the following success factors can be
outlined:

- Effective network within the industry, particularly between private and
  public sector;
- Strategic approach to the international wine industry;
- Research and Development as the basis for new technologies and variety of
  combinations;
- Stringent regulatory and appellation control system;
- Sufficient marketing of available viticulture;
Attracting the foreign investments; and
Economies of scale and scope.

Directions for Future Research

While some industry heavyweights have been covered, others have not and there are many supplementary fascinating case studies that can be researched as well.

One direction of research that provides fascinating research potential would be with the OW producer country of Italy. In the Italian wine industry, the importance of external economic developments that influence the sector can be seen, such as currency devaluation as an incentive for increased exports. This was accompanied by an overall traditional image of the country regarding oenology and an effective appellation system. However, obstacles for further growth and market penetration are weak coordination and communication among small, medium and large companies, and public administration bearing the stake of cost reductions. Failure in using the rich number of available grape varieties is also an obvious obstacle, together with strategic underestimation of other competitors, including nearby Eastern Europe.

Another potential case study would be that of Germany, which possesses the Rhine and Rhone regions within its boundaries. It is also an OW producer, but likewise maintains a strikingly lower international market competitor than its potential. Factors for this status are inclusive of noneffective production and marketing techniques together with a lack of governmental investment in this industry. In this respect, foreign investment and demand has also been lacking. A factor preventing growth would be complex labelling practices and another being poor communication to contemporary experiment-oriented consumers. Improper usage of historical experience must be noted as well, given the long history of winemaking present in Germany. Such issues can be resolved, particularly with the German reputation for high quality goods, but strides must be made in order to express its potential effectively.
Another potential case study from the NW would be that of Chile, which has significant market potential, but suffers from low quality perception. Miscommunication within industry sectors and lack of strategic approach represent failures that must be corrected in order to succeed. However, governmental focus on attracting Foreign Direct Investment (FDI) should be noted as success factor given that when lacking funds, seeking other means of capital generation is a correct way to proceed towards sectoral development and eventual success. The current strategy of Chile offering high quality wines at low prices does not prove itself to be successful though and requires a change in strategy. This can be explained once again by not maintaining a quality image and previous perception of the country for providing low quality wines has not been amended. A better way of proceeding would be with fixing its international perception of low quality wines to higher quality wines and to sell those at attractive prices.

Further direction of future research can include that of South Africa, a NW producer that possesses enormous market potential and the wine industry of the country is gaining international market share traction. This is led by success factors such as a stringent regulatory system, availability of internationally competitive local suppliers and efficient supporting industries. Yet, there are flaws present that prevent the country from reaching its potential. Such factors include the lack of trust wineries have in their support from external sources and competence of personnel in the public sector that would ideally facilitate greater trade. Focus of the industry on developing wine tourism, together with quality and ethical certification policy though should be mentioned as useful factors for the international performance of South African wine.

Conclusion

This article has examined global wine competition between four international heavyweights and provided points from which success can be achieved. Further case studies from both the Old World and New World were mentioned but further in-depth
studies can be undertaken and would be beneficial for even further understanding of sectoral competition on the global scale. Other directions of research can be New-Old World wine producing countries, meaning countries that are present in the Old World, but have yet to reach significant international market exposure. One example would be Georgia, which is a country that can boast over 8 millennia of wine, but has not yet achieved the same level of fame as other Old World or New World producers. While the clash between the New World against the Old World may be new in the span of time and globalization, the competition is not over and international business gives way for future bouts to occur.
## Figures

Figure 1:

World’s most powerful wine brands:

<table>
<thead>
<tr>
<th>Brand</th>
<th>Wine category</th>
<th>Rank in top 100 spirits &amp; wine brands</th>
<th>Firm owner</th>
<th>Country of production</th>
<th>Firm's country of origin</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Gallo</td>
<td>Still wine</td>
<td>17</td>
<td>Gallo</td>
<td>USA</td>
<td>USA</td>
</tr>
<tr>
<td>2. Concha y Toro</td>
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<td>18</td>
<td>Concha y Toro</td>
<td>Chile</td>
<td>Chile</td>
</tr>
<tr>
<td>3. Moët et Chandon</td>
<td>Sparkling</td>
<td>19</td>
<td>LVMH</td>
<td>France</td>
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<td>4. Robert Mondavi</td>
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<td>30</td>
<td>Constellation</td>
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<tr>
<td>5. Veuve Cliquot</td>
<td>Sparkling</td>
<td>32</td>
<td>LVMH</td>
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<td>6. Yellowtail</td>
<td>Still wine</td>
<td>43</td>
<td>Casella Wines</td>
<td>Australia</td>
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<td>7. Sutter Home</td>
<td>Still wine</td>
<td>44</td>
<td>Sutter Home</td>
<td>USA</td>
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</tr>
<tr>
<td>8. Hardys</td>
<td>Still wine</td>
<td>37</td>
<td>Accolade Wines</td>
<td>Australia</td>
<td>Australia</td>
</tr>
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<td>9. Lindemans</td>
<td>Still wine</td>
<td>55</td>
<td>Treasury Wine Estates</td>
<td>Australia</td>
<td>Australia</td>
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<td>10. Beringer</td>
<td>Still wine</td>
<td>60</td>
<td>Treasury Wine Estates</td>
<td>USA</td>
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<td>11. Freixenet</td>
<td>Sparkling</td>
<td>61</td>
<td>Freixenet</td>
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<td>12. Jacob’s Creek</td>
<td>Still wine</td>
<td>68</td>
<td>Pernod Ricard</td>
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<td>France</td>
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<td>13. Dom Pérignon</td>
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<td>69</td>
<td>LVMH</td>
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<td>14. Blossom Hill</td>
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<td>79</td>
<td>Diageo</td>
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<td>15. Mumm</td>
<td>Sparkling</td>
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<td>Pernod Ricard</td>
<td>France</td>
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<tr>
<td>16. Kendall Jackson</td>
<td>Still wine</td>
<td>87</td>
<td>Jackson Family Wines</td>
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<td>17. Martini Sparkling</td>
<td>Sparkling</td>
<td>89</td>
<td>Bacardi Martini</td>
<td>Italy</td>
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<td>18. Black Box Wines</td>
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<td>93</td>
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<td>19. Wolf Blass</td>
<td>Still wine</td>
<td>86</td>
<td>Treasury Wine Estates</td>
<td>Australia</td>
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<td>20. Nicolas Feuillatte</td>
<td>Sparkling</td>
<td>97</td>
<td>CV-CNF</td>
<td>France</td>
<td>France</td>
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<tr>
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<td>Sparkling</td>
<td>100</td>
<td>21. Taittinger</td>
<td>France</td>
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</table>

Sources: Global Wine Markets, Kym Anderson.
Figure 2:

Volume of national wine consumption 1980 – 2016:

Sources: Global Wine Markets.
Figure 3:

Exports as % of wine production volume 2014 – 2016:

Sources: Global Wine Markets.
Bibliography


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