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# **Wine Argentinean Export Chain: A Case Study in the UK Market**

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## Wine Argentinean Export Chain: A Case Study in the UK Market

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### Abstract

International wine market is becoming one of the more dynamic in beverages sector. This paper is a summary of the research developed during 2004-2006 at the UPM with Argentinean exporters. The selection of UK market was due to the high degree of competition between international wines: European, American, Australian and others.

Secondary information was collected from EU and Argentina publication and data bases. Primary information was obtained through face to face interviews with the main stakeholders and wine exporter entrepreneurs. UK wine market is one of the more competitive in the world and the main destinations of Argentinean exports. The presentation describes the strengths and weaknesses of the more significant wine exporters with a SWOT matrix analysis.

Argentina has comparative advantages in wine production but the main problem is the wine network exporting performance. The challenge is how to design adequate strategies, involving public and private national resources and get adequate quota market in the coming future.

Some specific recommendations are related to: Firms and country commercial brands, relationship exporters-UK retailers, trade brands shared by producers and commercial agents, promotion and publicity of Argentinean wines in UK.

Other scenarios of future development are the improvement of firm strategic alliances, rising added value in the wine chain for exporters and communication programs with UK society.

### 1. Introduction

The Argentinean wine industry tends to increase competitiveness and quality of products through the orientation to the world market.

The election of the United Kingdom was made considering that until year 2004, it was the greatest quality Argentine wine buyer. Simultaneously it is a market where the main world-wide producers come together, due to the high level of consumption and their prestige.

However, Argentina participates only with 1.02% of the volume of exported wine to the market of the United Kingdom, while other emergent countries in the international market like New Zealand, Chile and Australia do it with 1.1%, 4.6% and 18.5% respectively in last years.

The productive and competitive potential of Argentina, given by the favourable natural resources, the viticulture, the high quality of wines and the low costs of investment and production, does that the proportion of present participation in that market is considered very below the potential of the country.

However, one of the main barriers is the inertia in the firm managerial process to integrate the value chain. The capacity to innovate in all the links from producer to retailer faces special difficulties in international trade. Domestic link: farmers, wineries and exporters are endogenous activities with the possibility to get more information through direct contact. However foreign link (importers, retailers and consumers) are in many cases difficult to know and understand.

The objective of the present work is to analyze the strengths and the weaknesses that have the wine companies that export quality wines to the United Kingdom, in order to formulate strategies that influence in the exporting performance of quality Argentine wine to the market of this country.

## 2. Theoretical Framework

The strategic planning (David, 1995) is a logical, systemic and objective process from which a person, organization or country can reach its objectives based on the formulation, implementation and evaluation of strategies from an integrating and totalizer view.

This process can be detached in three stages, first is the *formulation of strategies*, it follows the *implementation* of them, and finally a stage of *evaluation* of the results obtained through the implemented strategies.

During the stage of **formulation of strategies** the mission of the company is defined, opportunities and threats are detected in the external environment and the strengths and own weaknesses of the company are identified soon to establish long term objectives, and from them to delineate alternative strategies and to prioritize within the same ones the most adapted.

The later stage, **implementation of the formulated strategies** is most difficult and complex, since it is necessary to create an efficient organizational structure within the company that allows the execution of the same ones. For it must be delineated short term objectives, be devised policies and assign resources.

Finally, the stage of evaluation of the strategies is necessary to determine if the implemented strategy is reaching the objectives for which was formulated. With the passage of time, the strategies can be modified because the internal conditions of the company, strengths and weaknesses undergo changes; as well as the external factors, the opportunities and threats, that were considered in the stage of the formulation. Since the strategic planning is a dynamic and continuous process, it is important to emphasize that the adaptation to the change is a necessary characteristic in all company.

### Looking the Methodology

Wineries, public institutions, R&D centers, grape growers and consulting companies were visited and with them took place semi structured interviews and structured surveys, for which seven trips to different viticulture regions from Argentina were made. The criteria for the election of the wineries and consultants interviewed were based on the security to accede to reliable information. The companies interviewed include a production rank that goes from 120,000 to 35 million liters per year. For that reason the interviews were segmented dividing the companies in big and small wineries. In the first group 4 wineries have been met, that altogether make the export of 50.2% of the total Argentine quality wines sold in the United Kingdom, which indicates the representativeness of the selected wineries.

### SWOT Analysis

Through two workshops made in Mendoza and Buenos Aires, a SWOT analysis has been made with the aid of specialists and key actors of the sector.

Soon, through the elaboration of the **Charts of Consistency**, it was analyzed the importance of each Strength, Weakness, Threat and Opportunity identified.

For the analysis of strengths the following dimensions are evaluated:

- Importance of the Strength evaluating based on its contribution to the competitive advantage.
- Difficulty of replication for the competitors

For that, a strong competitive advantage can be generated over the competitors; the strengths shall not be easily to be replicates. But, if the strength grants a common advantage to all the competitors, the same one will not generate advantages competitive.

For the analysis of the weaknesses the dimensions are:

- Facility of strengthening.
- Disadvantage in relation to the competitors.

These dimensions evaluate the possibility of reverting easily the created difficulty at the same time that the disadvantage in relation to other competitors is considered.

The opportunities are analyzed based on the probability of success on the part of the analysis unit and the attractive potential

These dimensions evaluate the possibility of use of the opportunity, obtaining successful results and the relative importance of the raised opportunity.

The threats are analyzed based on: The occurrence probability and the importance of the threat. In the chart of strengths, those that have a high importance and a high difficulty of replication are prioritized, that is, those strengths that are in the left upper quadrant. Those weaknesses that allow a high facility of strengthening and represent a high difficulty for the competitors are prioritized; these are those that are located in the left upper picture.

Also the opportunities are selected that are in the left superior quadrant, for being those of greater potential importance and of greater potential of success.

In the case of the threats, also those will be selected that are in that quadrant to represent a greater gravity and a high probability of occurrence, reason why will be necessary to avoid them.

For the formulation of strategies the SWOT matrix was used like tool, in which it is come to the determination of the set of interactions between the internal attributes given by the Strengths and Weaknesses, with the external environment (Opportunities and Threats). From SWOT matrix the strategies adapted for the improvement of the competitiveness of the sector are defined.

The crossover of the four quadrants, allows formulating the following types of strategies:

1. Strategies of Strengths and Opportunities (SO)
2. Strategies of Weaknesses and Opportunities (WO)
3. Strategies of Strengths and Threats (ST)
4. Strategy of Weaknesses and Threats (WT)

<b>Figure 1: SWOT Matrix</b>	<b>STRENGTHS</b> Listing of Strengths	<b>WEAKNESSES</b> Listing of Weaknesses	
	<b>OPPORTUNITIES</b> Listing of Opportunities	<b>Strategies SO</b> To use the strengths to take advantage of the opportunities	<b>Strategies WO</b> To surpass the weaknesses taking advantage of the opportunities
	<b>THREATS</b> Listing of Threats	<b>Strategies ST</b> To use the strengths to avoid the threats	<b>Strategies WT</b> To reduce the weaknesses and to avoid the threats

Figure 1. SWOT Matrix

In Figure 1 a schematic presentation of SWOT Matrix and its practical application are made

The crossing of the external factors (Opportunities and Threats) and the internal factors (Strengths and Weaknesses) allow to identify the existing relations between such, with the purpose of to identify which of the interactions are the most important based on the possibilities of being considered for the formulation of strategies.

### 3. Results and Discussion

According to the methodology of Strategic Planning, the way to reach the objectives indicated by a company is the formulation of strategies. For it a SWOT analysis has been made, through it appear the Strengths, Weaknesses, Opportunities and Threats that soon will be prioritized from the analysis of consistency with the purpose of making a SWOT matrix that incorporates only the most important issues and allows to recognize the crossover of those that are related to each other, task that soon allows to formulate and to prioritize in ordered form the strategies that conducive to reach the raised objectives.

#### **SWOT Analysis**

##### *Strengths*

1. Excellent agroecological characteristics.
2. Low costs of investment in land and vineyards.
3. Excellent relation price/quality.
4. Old wine tradition.
5. Human resources with good technical capacity.
6. Recently investments in technology.
7. Lots of varieties of recognized quality.
8. Production with little use of chemical inputs.
9. Extensive internal market with a tendency towards quality wines.

##### *Weaknesses*

1. Low prices in the market of the United Kingdom.
2. Low negotiation capacity with distributors.
3. Low negotiation capacity with supermarkets.
4. Difficulty to obtain good distributors.
5. Lack of measurement of competitiveness and benchmarking in Argentine wineries.
6. Lack of cooperation mechanisms and relations between actors of the chain in the long term.
7. Insufficient/Inadequate promotion of Argentine wines.
8. Lack of fiscal incentives for the export.
9. Lack of recognition of the Argentine wine marks.
10. High structure of fixed costs in the wineries.
11. Difficult access to the credit.
12. Insufficient legal security.

*Opportunities*

1. Increase of the wine consumption in the British market.
2. Appreciation of the quality on the part of consumer.
3. Increase of the prestige of the United Kingdom suppliers.
4. Diminution of the importance of traditional countries.
5. The buyers fulfill the commitments strictly.
6. Professionalism and knowledge of the buyers.
7. Innovating market and consumers.
8. Good attitude towards New World wines.
9. Tendency to the quality wine consumption.
10. Growth of the tourist activity in Argentina.

*Threats*

1. Creation of fiscal or tariff barriers.
2. Recovery of the “Old World” wine producers.
3. Incorporation of other countries (East Europe and extra European)
4. Change in the tendency of the wine consumption in the United Kingdom.
5. Diminution of the level of prices in the United Kingdom.
6. Excess of quality wines production in Argentina.

In order to make the Analysis of Consistency four charts were elaborated, in which the internal (Strengths and Weaknesses) and external (Opportunities and Threats) factors are located depending on their relative importance according to their possible evolution in the time, probability of occurrence, like by the possibility of being reverted that factor as a result of the operative implementation of strategic decisions.

It is as well as in the case of the Strengths, not only the importance of the same one has been considered (high or low), but that also have been located according to the facility of replication of same on the part of the competitors, since a Strength that soon is shared with the other competing countries, lets be it, because it does not confer any competitive advantage.

In the case of the Weaknesses it proceeded in the same way, that is to say, the importance of each one of them settled down and also the facility to fortify itself.

With respect to the Opportunities, a classification that considers the importance of the same ones settled down and in the other axis were located according to the probability of success of this Opportunity, that is to say, as the same one can influence to obtain the objectives raised previously.

Finally in the case of the threats the potential gravity of them was analyzed, that is to say, how it can affect the fixed objectives if the same ones take shape. Secondly the probability of occurrence of each threat settled down, in other words, it evaluated the possibilities that it has to take shape.

Next the four elaborated charts are presented. The numbers that appear in the following chart refer to the numeration of the factors identified in SWOT already mentioned.

STRENGTHS		STRENGTH IMPORTANCE	
		HIGH	LOW
DIFFICULTY OF REPLICATION FOR THE COMPETITORS	HIGH	2 3	9 4
	LOW	1 7	5 6 8

OPPORTUNITIES		SUCCESS PROBABILITY	
		HIGH	LOW
POTENTIAL IMPORTANCE	HIGH	31 32_30 38	36 35 37
	LOW	39	34 33

WEAKNESSES		FACILITY TO FORTIFY ITSELF	
		HIGH	LOW
DISADVANTAGE IN RELATION TO THE COMPETITORS	HIGH	14 16 18 13 15	10 11 12 19
	LOW		20 17 21

THREATS		OCCURRENCE PROBABILITY	
		HIGH	LOW
POTENTIAL SEVERITY	HIGH	42 46 45	44 40
	LOW		41 43

Figure 2.

From these charts the factors that are in the upper left chart were prioritized and with them have been made the prioritized SWOT Matrix that appears hereafter.



**SWOT: GENERAL MATRIX AND CROSSING BETWEEN PRIORITIZED STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS**

	STRENGTHS				WEAKNESSES				
	EXCELLENT AGROECOLOGICALS CHARACTERISTICS	LOW COST OF INVESTMENT IN LAND AND VINEYARDS	EXCELLENT RELATION QUALITY/PRICE	BROAD INTERNAL MARKET AND TENDENCY TO QUALITY WINE	LOW POWER OF NEGOTIATION WITH DISTRIBUTORS AND SUPERMARKETS	LACK OF MEASUREMENT OF COMPETITIVENESS AND MARKETING IN ARGENTINEAN WINERIES	LACK OF LONG TERM COOPERATION AND RELATION MECHANISMS BETWEEN ACTORS OF THE CHAIN	LOW ARGENTINE WINE PROMOTION IN THE OUTSIDE	LACK OF RECOGNITION OF THE ARGENTINE WINE MARKS
<b>OPPORTUNITIES</b>									
INCREASE OF THE WINE CONSUMPTION IN THE BRITISH MARKET									
VALUATION OF THE QUALITY ON THE PART OF THE CONSUMER									
INCREASE OF THE PRESTIGE OF THE SUPPLIERS IN THE UNITED KINGDOM									
TENDENCY TO THE QUALITY WINES									
<b>THREATS</b>									
WINE RECOVERY OF THE OLD WORLD									
INCORPORATION OF OTHERS COUNTRIES (EAST EUROPE AND EXTRAUROPEAN)									
DIMINUTION OF THE PRICE LEVEL IN THE UNITED KINGDOM									
EXCESS OF PRODUCTION OF ARGENTINEAN QUALITY WINES									

**Figure 3.** SWOT Matrix Prioritized

**4. Strategies in the firm export management development**

In this section we give some orientation in relation to the strategies that may increase the competitiveness in the last steps of the wine export chain, retailers and consumers.

a) Relations with retailers

The distributors or agents, are key actors in the development of the businesses with the United Kingdom, since practically in all the channels, their participation is required.

Parallely the Argentine businessmen, have informed about the difficulty to obtain good agents, their reduced number, the great amount of wineries that compose the portfolio of each one of them and also the difficult thing that it is to obtain his “fidelity” throughout the time.

It is for that reason that all the efforts that can make the wineries in gaining good agents or distributors and those who make later to consolidate the relations with such, will have a fort impact in the sales that are obtained in that market.

The consolidation of the relations with the agents has different possible modalities, between most advisable can be indicated the invitation to make visits to the wineries, the joint design of wines, the establishment of promotion plans, the joint work with the final clients, and even the development of marks in society with the distributors.

All these activities allow a more fluid relation between the wineries with their respective agents, since many of the competing wineries, are limited only to a trade relation, like it has been seen in some of the companies interviewed.

### b) Brands Strategy

The development of brands is central due to it is the image that allows to obtain the fidelity of clients and consumers. Also it must stand out that the Argentine wineries, with some exception, have not developed important trade brands in the United Kingdom. The subject of the brands has different aspects.

### c) Development of Country Brand

The totality of the survey group have declared that not sufficient efforts have been made yet to develop to the country brand, with which facilitate the enter of wines of all wineries in the external markets. This initiative, made as much by public organisms as by associations of businessmen must be fortified and be supported economically with more force by both sectors, to the effects to allow a suitable competition of the Argentine wineries with those of other countries, mainly, of the New World, that make these efforts for the promotion of the country brand. Obtaining a strong country brand, creating a quality control mechanism to be able to protect itself under the same one and establishing strong alliances with the agents, this important weakness can be attenuated.

### d) Trade Marks

As it has been said, it does not exist Argentine wine trade marks of importance in the United Kingdom, with the exception of a pair of wineries that have made an important economic effort to position their trade marks, which is not within reach of most of the local wineries.

#### Trade Brands shared with the Agents

The solution achieved by some wineries to create trade brands shared with the agents, seems very appropriate, since it allows making contractual alliances that if they are beneficial for both parts, could have a broad temporary horizon, and as well generate a competitive barrier with other wineries.

#### Brands of the Supermarkets

The solution of white brands, property of the supermarkets, is dangerous, since it allows the commercial chain to change of supplier faced with the proposal of better commercial conditions. However it could be a solution for the wineries due to they increase the volumes of exports, reducing therefore fixed costs.

Intermediate options exist like the development of a brand of the wineries, exclusive for a commercial channel that is better than the previous option, but not always is accepted by the chains. In order to respond to this reality of asymmetry in the trade relations between wineries and supermarkets, the set of the market must be consider, balancing the sales between different commercial channels, even when some of them requires greater effort since the volumes are smaller, but can have greater perpetuation in the time, which is difficult to obtain with the property brands of the supermarkets.

### d) Promotion and Publicity

It has been previously indicated that given to the low scale of the Argentine wineries and the high costs of the publicity in the United Kingdom, the achievement of advertising campaigns is very difficult to most of the wineries, therefore they must be limited to strategies of promotion

of their products by their agents or the supermarkets.

Also the construction of the image country requires publicity that in this case would have to be made in collective form, using the promotion funds that the sector has. However also it is indispensable to coordinate these actions of promotion of the different wineries, with the commercial channels and the organisms in charge of the promotion.

The simultaneous fulfilment of collective advertising campaigns of the image country, added to individual strategies of promotion of the wineries with their respective agents through tastings and other activities in different topics and with one coordinated promotion of price agreed with the supermarkets, pubs, restaurants, etc., would help to construct the country brand, simultaneously that would individually reinforce the brand of each one of the wineries, allowing to manage an increase maintained from the exports to that market.

#### e) Strategic alliances

As it has been indicated previously all the efforts in matter of marketing, cannot be developed individually by most of the Argentine wineries, but through strategic alliances with other actors of the chain, between which the most important are the distributors and agents, the supermarkets and institutions. Only constituting a hard cluster in matter of commercialization, significant increases of the exports of Argentine wines in this market will be able to be obtained.

#### f) Raising of the Added Value Strategies

Since that exists an asymmetrical relation between the Argentine wineries with the agents, distributors and supermarkets, it is difficult to take control of the increase of value that is managed in wines, as a result of his quality.

At the same time the particular characteristics of the United Kingdom market, which is extremely demanding in quality but it is not prepare to increase the purchase price, do not help to generate differentials of prices by added value, except for a little exceptions and consequently, do not allow an appropriate distribution of the benefit between wineries and distribution channels.

Either the Argentine wineries, except some exceptions, have made an exact use of the mechanisms of quality differentiation or establishment through certifications, like for example ISO, HACCP, IWP, which would allow establishing a barrier against the competitors.

The organic wine certification has been indicated by some of the interviewed people, like a valid mechanism of differentiation that has allowed to introduce itself in some commercial channels and also to improve the added value and the raising of itself.

The development of own brands of the wineries and also of those developed jointly with the distributors, as well as strategic alliances with commercial channels of smaller dimension, such as wine clubs, restaurants, chains of pubs, wine cellar and wine bars; they can be mechanisms that allow to take control from the added value.

#### g) Diffusion and Communication Strategies

It has indicated that Argentina presents a deficient diffusion and communication strategy of its wines that is limited to the participation in international fairs and a very modest advertising action, based on the low budget destined to this aim.

Due to has also pronounced that the activity of the different public and private institutions that participate is not organized, it is considered appropriate to establish strategies that put emphasis

to concentrate the efforts in the matter, developing a unique agency in which all the efforts towards the promotion of wines in the United Kingdom market and the budgets that the different institutions and companies apply to make it, come together.

This strategy already has been used by diverse countries within which they are possible to be mentioned to Australia and Chile, in both cases with very good results according to the information available and its degree of participation in that market. The election of the communication agency is a very important point, since on the same one depend the success to reach. Unfortunately the experience of promotion made in the internal market is not good, since the conducted publicity to increase the consumption in the young people did not give the foresee result.

The communication in matter of wines must be associate to the communication about the characteristics of the country, the natural conditions of production and can strengthened with other sectors like tourism and other important products of Argentina like meats.

## 5. Conclusions

During the development of this work we describe how Argentina has competitive conditions to achieve a better position in the market of quality wines market in the United Kingdom. However, even recognizing the difficulties that this market has, as much the wine industry as a whole as the companies not yet have explored all the possibilities that they have and its performance is still below the potential.

Depending on the form in which the Argentine wine industry develops competitive advantages, through a detailed analysis of the present situation and the future expectations, it will have better possibilities of achieving one higher position in the markets, for which will have to be put emphasis in improving the companies strategies like did it in the past with the objective to perfect the quality of the vineyards, grapes and wines.

Special attention should be given to the innovation in marketing strategies focused at the retailer and consumer in British market, as a hall mark of international wine chain performance.

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