Deliverable 1.4

In-depth analysis at market and demand level of the three priority country-markets for the Greek wine sector and the Greek market

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Παραδοτέο 1.4

Ανάλυση σε βάθος των τριών χωρών-αγορών προτεραιότητας & της Ελληνικής αγοράς σε επίπεδο συνθηκών αγοράς και ζήτησης

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Introduction

The aim of the present deliverable is to provide an in-depth analysis of the three reference country-markets for Greek wine, namely USA, UK and Germany (revealed through the Attractiveness vs Competitiveness study that was conducted within the scope of the present project), as well as the domestic market.

The study comprises of individual country-market reports imparting a condensed overview of the correposponding markets in terms of both demand and supply. Each country-market report is segmented as following:

- Market profile: analyses key figures in terms of size, growth, price points, as well as top-selling brands
- Market structure: discusses the distribution system and important regulatory issues, on- and off- trade profiles and trends, as well as major players in the value chain
- Catalysts, trends, consumer perceptions and behavior: identifies catalysts and prevalent trends in the wine domain, main consumer perceptions regarding wine, as well as behavioral patterns influencing purchases

In the beginning of the document critical observations are presented, including overall comparative analysis of all issues discussed as well as competitive environment assessment for the 3 reference markets and Greece using Porter's «Five Forces» model.

The Appendices section, provides further documentation and detailed information per country-market regarding the following:

- Appendix A profiles top selling wine producer brands per country of origin and their corresponding flagship labels
- Appendix B determines and portrays urban «creative centers» in the 3 reference country-markets, USA, Germany and the UK. Responding to Greek wine industry's interest in the emerging markets of Canada, China and Russia, the strategic consultant -on his own initiative- undertook further research in order to identify and profile creative centers in the 3 additional aforementioned markets.
- Appendix C identifies and profiles wine and gastronomy catalysts in the 3 reference country-markets, Greece, and the emerging wine market of Canada.

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Methodology

Primary performance analysis for each market includes volume size and growth evolution for domestic and imported total and still light wine as well as benchmarking against other alcoholic beverage categories, such as hard alcohol, beer and flavoured spirits. Especially with regards to SLW, imported wine competitor volumes and growth have been analysed together with price segment breakdowns for total and imported wine.

Primary performance analysis has been conducted for all countries based on data from the International Wine and Spirits Record, to ensure consistency across the study and allow for comparative analysis.

Secondary performance analysis includes performance in terms of value size and growth and more in-depth breakdowns, such as performance by type of wine and brand performance by price segment.

With secondary analysis a variety of sources have been used such as research and studies by independent private or trade organisations, industry associations and insitutions, media reports etc. Although the use of secondary sources allows for a more detailed insight in each particular market, a degree of caution should be exercised when juxtaposing figures at this level from different sources across countries.

In regards to the markets' structure and operation, to ensure the accurate and pragmatic depiction of each reference country's inner workings, a number of quantitative and qualitative sources have been taken into account:

- Data and commentary from an array of market research reports
- Data, commentary and secondary analysis found in presentations and articles published by experts or national/regional organisations involved in the running of each market's wine industry
- Articles and news reports from major media sources for each country-market
- Knowledge from the project's pool of experts and the Greek wine industry's export managers. To make certain that all knowledge available has been utilised, a number of smaller and larger workshop meetings have been conducted along with research through questionnaires to encapsulate the Greek wine industry's insight in this study

With reference to consumer trends, perceptions and behavior, a number of sources have been utilised:

- Market reports by independent bodies as well as presentations and articles by experts or national/regional organisations involved in the running of each market's wine industry

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- Previous deliverables and accompanying reports that have been undertaken by the consultant for the purpose of this project and specifically the "Greek wine mystery wine shopping – London market" report, the "Online shopping review – Top UK wine retailers" report, Deliverable 1.1: "Global sustaining and emerging trends for the Greek wine sector" as well as all the weekly "Global wine trends" reports produced since commencement of this project.

N.B. Methodology concerning the identification of wine and gastronomy catalysts in country-markets is described in the corresponding appendix.

Evaluation of data

With regards to the absolute accuracy of data used, extreme caution has been exercised to ensure that all data used in this report give the truest impression of the market's actual condition. Where possible, data has been cross-checked with multiple sources and where discrepancies have been found, notes of caution have been made. To ensure the reader's correct interpretation of all data, figures and conclusions presented in this study the following notes must be taken into account at all times:

- All market reports used in this study are based on data from local and national wine industry organisations as well as trade comments. Certain figures are impossible to take into account (e.g. illegal/unregistered imports and exports of wine) and others are only given as rough estimates (e.g. bulk wine and retsina wine share in the Greek market) due to lack or inefficiency of the respective monitoring or regulatory procedures in the corresponding market.

- All demographic analyses are based on population samples. Efforts have been made to use sources with larger base samples, however caution must be exercised and the fact that figures based on sample data may have a certain degree of variance from the total population must also be taken into account.

- With regards to prices, all prices used in this report are off-trade retail prices. IWSR price data are based on leading supermarket retail audits; similarly, Datamonitor and Mintel use Retail Selling Prices (RSP) which include all applicable taxes.

- With regards to the Greek market, a great level of discrepancies existed between data and figures from every source. This is due to the absence of regular and systematic data collection and statistical analysis by an official governing organisation of the Greek wine industry. The lack of data was evident at all stages of the wine value chain: production, domestic sales and international trade, retail audits, etc. As with every other country-market report in this study, best efforts have been made to ensure the accuracy of data used, as these are evident through cross-checking of sources and subsequent sense-checking with Greek wine industry experts.

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Critical observations and competitive assessment

Market basics

The three reference country-markets are responsible for over a quarter of global wine consumption. The UK, having negligible own wine-production, relies exclusively on imported wines while for Germany and the US, imported wine consumption (in volume) accounts for almost 50% and around 27% respectively.

In direct contrast to the UK, wine consumption in Greece is almost entirely based on domestic products (more than 95%); half of the volume is generated from unbottled wine sales, while retsina is estimated to represent a large share, varying from 15% to even 35% according to source (lack of official data creates discrepancies on estimations - those issues are further discussed in the Greek market analysis section.)

Wine seems to be gaining ground over beer and other alcoholic beverages, especiallly in Germany and the UK, while even in the US, where alcoholic beverages' categories consumption is on the rise, wine outpaces beer. In Greece, even though wine consumption growth is marginal, wine (and beer) seem to gain preference over heavier alcohol. This is due to a number of reasons later analysed within the present report, such as increasing awareness of wine-associated health benefits, stricter drink-and-drive legislation, cutting down on alcohol consumption levels, pricing etc.

Imported wine markets of Germany and the UK are reaching maturity, a safe indication being the slowing down on growth[1], as depicted in the graph in the next page; conversely, the US has been on the rise, and is considered a promising market under development.

In Greece, inspite of imported wine consumption still bearing a minimal share, the current economic crisis along with the advent of mega retailers' private labels of mostly budget New World wines, are expected to raise a serious threat to Greek wines in the future.

[1] Growth here is measured as the Compound Average Growth Rate (CAGR): CAGR is the geometric mean growth rate on an annualized basis and it represents the smoothed annualized gain/loss achieved over the entire period in question. CAGR dampens the effect of volatility of periodic gains/losses that can render arithmetic means irrelevant, and is calculated by the formula:

$$\mathrm{CAGR}(t_0, t_n) = \left(\frac{V(t_n)}{V(t_0)}\right)^{\frac{1}{t_n - t_0}} - 1$$

where $V(t_0)$: start value, $V(tn)$: finish value, $tn - t_0$: number of years.

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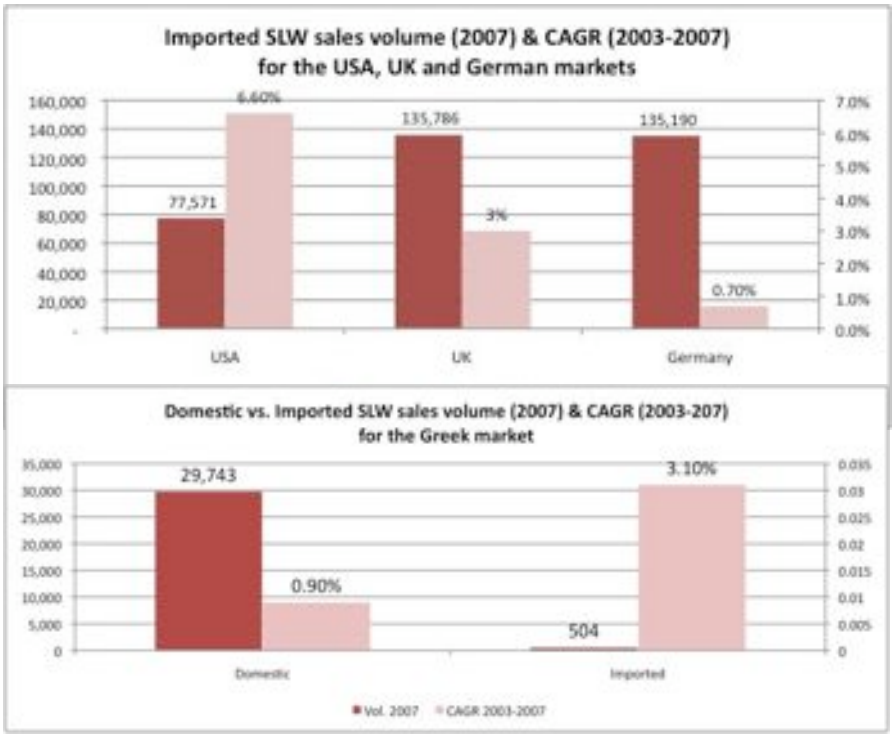

Source: Both graphs based on data from *IWSR Index* reports for the *USA (June 2008),* the *UK (June 2008), Germany (June 2008)* and *Greece (April 2008)*

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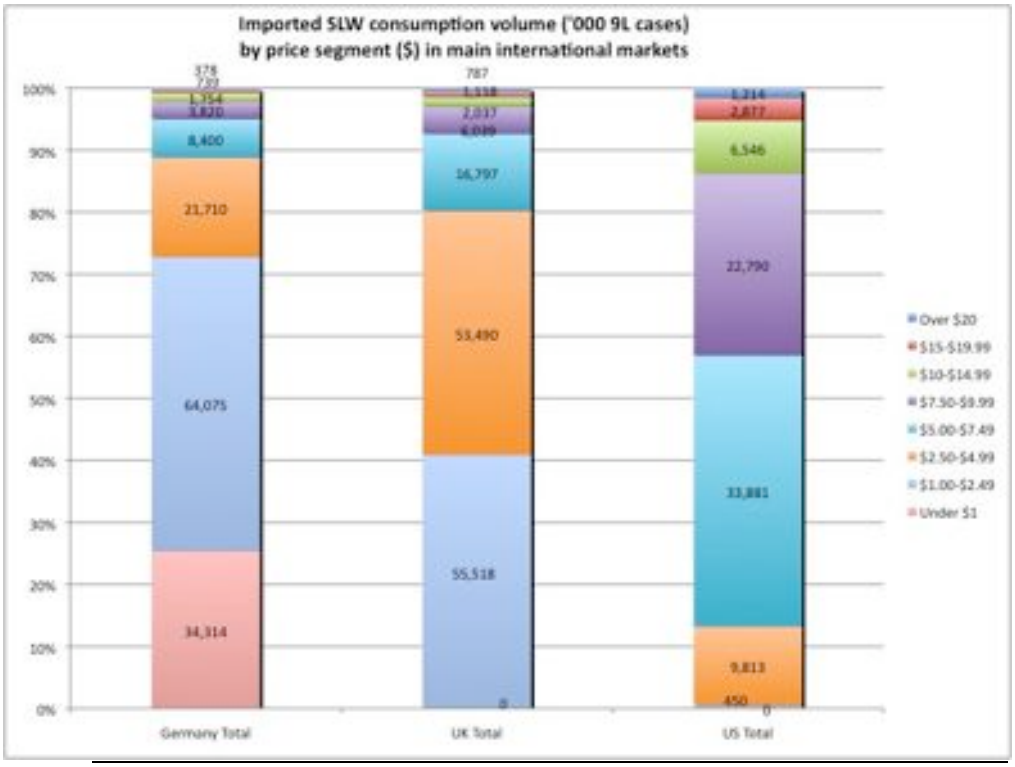
Regarding imported wine consumption per price segment[2], mature markets, namely Germany and the UK, demonstrate majority of sales volume in the lower price segments. The German market, famous for its high price sensitivity, demonstrates an impressive 25% of imported wine consumption in the Under $1 category, while a mere 10% is sold in the Above 5€ segments. On the same tone in the UK, only 20% of imported wine is sold at above $2.5.



Source: based on data from *IWSR Index* reports for the *USA (June 2008), the UK (June 2008), Germany (June 2008)*

Nontheless, in all three markets, consumption value growth outpaces volume, indicating an escalating consumer preference for quality over quantity, a trend allowing for premium products and higher profit margins (an issue discussed also later on).

Yet, the consequences of the current economic downturn on total imported wine sales cannot be foreseen; however, experience suggests that in such circumstances mid-priced brands tend to be the ones that suffer most, as consumers opt for either the low-end, budget- or the super-premium brands. According to industry sources, UK consumers are now trading down but buying more, whereas in the US consumers are now getting more expensive wines for less as fine wine prices are driven down in an effort to trim inventories.

[2] Prices in this section are featured in US$ in order to facilitate comparative analysis. However, price analysis in each individual country-market report are quoted in local currencies

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In Greece, a significant difference is observed between imported and domestic wines' price segments. Domestic wines trade at an overwhelming 60+% under the $2.49 segment, with only approximately 5% of their volume sold at above $10 price segments. The reverse holds true for imported wines with less than 5% of their – practically insignificant – volume trading under $2.49 and 30% selling for prices at $7.50 and higher.

Source: Based on data from *IWSR Greece Index, April 2008*

In terms of color of imported wine, Germans mostly prefer reds 52% (an indication of appreciation for their recently acclaimed domestic whites) while in the US and the UK red to white consumption ratio is in balance. Rosés' consumption is on the rise, validating the recent consumer trend. Yet, for the moment this is far more important in the US, where rosés account for 17% of total slw consumption, whereas the corresponding figures for Germany and the UK are less than half. In Greece, rosé wine is estimated to hold approximately 4-7% of total volume (both domestic and imported sales), with the red-white balance shifting towards white wine (60%).

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Main national and corporate players

Italy is the market leader in the US and Germany, accounting for 32% and 42% respectively on imported slw sales volume. Australia has dethroned France and now leads the category in the UK. France has follower roles with decreasing shares, while Australia, Spain, and several niche players such as Chile and New Zealand demonstrate impressive growth (issue discussed extensively in Deliverable 1.2).

The German and the US markets are currently quite consolidated, as the 3 top national players, Italy, France and Spain in Germany and Italy, Australia and France in the US, represent 75% and 71% respectively on total sales volume, while the remainder is broken up among a large number of nichers. For Germans, this could be partly justified by the fact that consumers make conscious decisions upon coutnry of origin, as it will be later on discussed within the study (see corresponding section on Germany). However, the balance in the US is expected to change as the market develops further as most nichers now demonstrate impressive annual growth rates (see corresponding section US). The UK is currently the most fragmented among reference markets, with the 3 main players representing 50% of total sales volume, and the rest shared among a large number of wine producing countries.

In Greece, French, Spanish and Italian wnes dominate imported wine sales with a total share of 66%. The New World is now making its first appearance with the US (8%) and Australia (6%) being the two main niche players and a small number of even smaller players following them.

The premium price segments (>10€/bottle) are dominated by French wines in Germany (31%) and the UK (45%), while Italian brands are the indisputable leader in the US. In Greece, French wines hold an overhwelming (74%) on the premium imported SLW segment.

The importance of brands is evident mostly in the three reference markets; mega-brands are marketed by a small number of (global) corporate players (producers and/or importers/ distributors) with high shares, such as E&J Gallo, Constellation, Peter Mertes, The Wine Group etc.

Market structure

Distribution systems in the UK and Germany are rather straightforward: importers are in most cases distributors; mega-retailers and specialists often import directly from producers; and there is an increasing trend of wine brokers.

Nonetheless, the largely criticised three-tier system, operating in the US, is much more complex: importers, distributors and wholesalers have clearly distinguised roles, fixed mark-ups apply, and several restrictions are in force varying according to State. The three-tier system has been under severe criticism that has gradually led to the loosening of restrictions, and the distribution paradigm could be challenged in the future.

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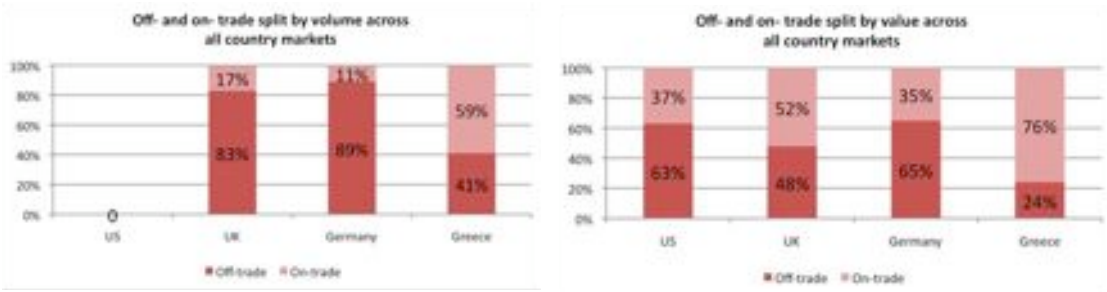
The market structure in Greece is rather chaotic and hard to define. A lack of regulatory framework translates to a number of various players (producers, importers, wholesalers, distributors, supermarkets and specialist retailers) playing overlapping and, in some cases, conflicting roles.

Distribution systems and regulatory frameworks are extensively discussed and major players are profiled later on in this study.

Retail channels

As expected, wine sales volumes are driven by the off-trade (89% in Germany and 83% in the UK), illustrating the home-drinking and entertaining trend. Yet, regarding the value split, off-trade sales in Germany and the US amount for approximately 65%, while the quota is reverse in the UK, where the on-trade represents 52% of wine sales value. This may be a safe indicator of ultra premium prices per bottle consumed probably in high-end wine bars and restaurants. In Greece the balance is estimated to tip over to the on-trade, both by volume (59%) and by value to an even greater extend (76%).

Given the current economic downturn, on-trade sales are expected to drop as consumers reside more to in-home entertainment, cut down on eating-out expenses, or even bringing their own bottles at restaurants.



Source: based on multiple sources (see relevant graphs on individual country reports for details)

Off-trade wine sales are dominated by mass market retailers in all 3 reference markets:

- In Germany, supermarkets, hypermarkets and discounters hold a collective 72% of sales volume and 54% of sales value
- In the UK, multiples and grocers constitute 77% of total sales value

The situation is a bit different in the US as food retailers, such as grocery stores, are not licensed to trade alcohol in several states (New York included). As a result, supercentres, warehouse clubs and supermarkets only amount to 43% of total wine

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sales value. Nontheless, this could be changing in the near future, as actions in this direction are taken by large scale players.

Mass market retailers have been gaining ground at the expense of specialists who currently hold 18%, 20% and 51% of sales value in Germany, UK and the US respectively. This is due to a number of reasons, such as: upscaled wine sections, offering greater variety in lower prices and consumer guidance; convenient locations and extended opening hours; cross deparemental marketing activities with gastronomy section; the consumers' desire to consolidate shopping trips.

Greece seems to be a step behind as specialists still hold a dominant 47% of the market's value. This is primarily attributed to the relatively small expansion of «convenience» supermarkets and the limited opening hours for all types of supermarkets compared to the «open 'till late» patterns of specialists. Still, the balance is starting to tip steadily towards supermarkets.

Specialists in the UK and Germany include several retail chains, namely Majestic, Oddbins or Jacques Weindepot, as well as a large number of independent stores. However, in the US, most liquor stores exist as single-location operations with a few exceptions, such as Sherry Lehmann in New York.

Direct sales from domestic wine producers are quite important for the German market as they represent 22% of sales value.

The internet is now emerging as an important tool, as it provides easier selection, direct access to reviews, and hassle-free transport; in acknowledgment of its future significance, the majority of food retailers in the UK today operate online stores.

In the US, the gradual loosening of restrictions on direct-to-consumer shipments is considered to be facilitating internet sales in the future, even though sales cannot be operated on a national basis. However, Amazon's partnership with Wine.com which will be launched soon is expected to have a significant impact in the market.

Major off-trade players and their profiles are presented in each country-market analysis within corresponding sections, while as top trend-setting restaurants and bars are identified and profiled in Appendix C.

Wine catalysts

Opinion-leading entities influencing the wine industry consist of an array of traditonal, online and social media (lifestyle, variety, well-being, gastronomy, wine); professionals such as chefs, editors, wine experts and gastronomy celebrities; venues such as trend-setting bars and restaurants; and high profile industry events, such as awards, fairs and exhibitions.

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The significance of the creative class[3] becomes apparent n view of the profile and locus of the identified catalysts, as most of them are concentrated in the so-called urban «creative centres» identified and profiles in Appendix B, such as Berlin, New York, London, Hamburg, Los Angeles, Athens etc.

Trends and consumer perceptions

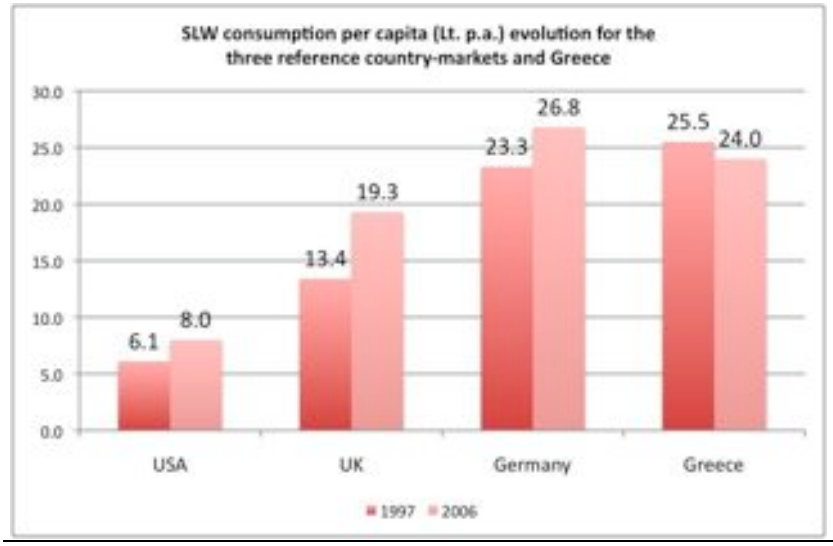
Global sustaining and emerging trends in the wine domain were identified and exhaustively analysed in Deliverable 1.1. Yet, those among them that mostly affect the examined markets were analysed briefly in the corresponding country-markets sections of the present study.

Several issues are mostly relevant to specific markets, such as: responsible drinking (to prevent underage and binge drinking) in the UK; wine consumed as an aperitif in Germany; or the consumers' eagerness to experiment with lesser known countries of origin in the US.

Dominant recurrent themes, largely visible in all 3 three reference markets (which are further analysed in the individual sections), include the following:

Increase in wine consumption

The following graph summarizes per capita consumption evolution across all country-markets:



Source: Based on data from the *IWSR wine handbook, 2007*

[3] A group of people that according to Dr Richard Florida are considered to be a key driving force for economic development of post industrial cities. It consists of scientists, engineers, managers, innovators and people in R&D, as well as artists, writers and musicians, thinkers, decision-makers, who influence culrual phenomena nad impact business. Their impact not only on the evolution of the consequent creative centres but also on the further concentration of individuals that excel in their domains is evident.

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As it is evident throughout this report, it is clear that wine consumption is on the increase. This holds especially true for the case of the UK, which shows the largest increase in the 1997 to 2006 period with 44%, despite being a mature market. Greece presents a much smaller degree of fluctuation (-6%) and a decline in per capita consumption. Reasons for this are analysed further in the report.

Wine as an everyday drink

A number of reasons, such as the advent of straightforward New World wines, the products availability through a variety of channels, the plethora of information available, the growing interest in food and gastronomy etc, have contributed in enhancing consumers' interest and understanding of wine. Once perceived mostly as unfamiliar, difficult to decode and even pretentious, wine today is seen as accessible, «affordable luxury», suitable for every day and every occasion.

Still light wine penetration in the mature markets of Germany and the UK is 70%, while for the US –still considered a developing wine market- is 35% (17% for imported slw) and growing. This has been encouraged by the fact that wine is now perceived as the ideal meal companion and has overtaken beer even in the traditional UK and German markets.

Premiumisation and indulgence

This trend has to do more with the perceived value and quality of the wine and less with the price per se. It has been further stimulated by the wider gastronomy trends promoting quality, indulgence and authenticity, such as the slow food movement.

Wine growth is expected to come from sales value rather than volume, especially in mature markets, as indicated by recent trends discussed earlier. Consumers, are prepared to pay more for good quality wine, even in discount-obsessed markets such as Germany and the UK, where the average amount likely to be spend per bottle is steadily increasing. Price is indeed perceived as an indicator of quality, yet consumers think that a good wine doesn't necessarily have to be expensive.

Home drinking

In-house consumption, complemented by home entertainment, is a prevalent trend boosted by the recent smoking ban, the alcohol level limit for drivers, and the current economic crisis. A glass of wine is considered the ideal treat after a hard day's work, either relaxing in front of the television for Germans or unwinding in... the bath tab for British ladies. In the US, home consumption seems to support the premiumisation trend as well, as wine lovers invest in their indulgement by purchasing wine storage accessories and expensive bottles, even installing mini cellars in their basements.

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Ethical and environmental issues

The rise of ethical consumerism and the growing interest in healthy products has influenced the wine domain, increasing demand for organic, biodynamic and eco-friendly wines, as well as fair trade-certified products.

As the number of consumers interested in alternative products is escalating (36% of US consumers claim they always or regularly buy green products, and 15% of german consumers buy organic products) and there is a positive correlation among conscious consumers and wine drinking (in the UK wine lovers have a higher-than-average level of ethical concerns), the wine industry is customising its offer to cater for such demand. To this end, eco-friendly packagings with reduced carbon footprint were developed, alternative winegrowing practices were introduced, and organic/ethical food sections in retailers expanded (organic wine section in liquor stores in the US is considered to be growing by 20% p.a.).

However, on the cynical (and maybe realistic?) side, industry experts are concerned that eco-chic might as well be the latest fad, as consumers are not really willing to give up on habits and convenience (and switch to eco-friendly tetra-pack packaging for instance) to protect the environment.

Healthy drinking

Wine's inherent health benefits are greatly acknowledged, especially among older demographics, such as Baby boomers, who mostly associate them with red wines. Moreover, they have been the main driver for those who shift from other alcoholic beverages to wine, to moderate their alcohol intake for dietary and health reasons. Adapting to the trend, an array of low-alcohol, even functional wines (with added antioxidants) have been developed and showing signs of growth, while smaller, 2-glass bottles have been introduced.

This perception is especially relevant to the Greek market, as wine in Greece has been linked to good health throughout the centuries, mostly as part of the mediterranean culinary traditions, the Greek cuisine as well as its various regional versions (e.g. Cretan cuisine).

Trends and consumer perceptions in the Greek market

Issues directly related to the greek wine market that are crucial for the future competitiveness of greek wine are the following:

- **Loyalty to domestic wines:** wine is considered as one of Greece's integral cultural elements and as such it benefits from very strong loyalty by the entire customer base, across all demographics. Germany as a market also carries a degree of pride for its domestic wines but this holds

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mostly true with regards to more senior demographics and does not protect domestic wines from their imported rivals to any length.

- **Lack of wine education:** Perhaps surprisingly out-of-line with Greece's wine culture and historic roots in wine-making, the Greek consumer in general appears to be uneducated at all levels: matching wine with food, choosing wine on the basis of character/aroma/palette or even recognising good quality wine from poor quality -even oxidized- wine when he comes across it. In contrast, the international consumer for wine as presented through the three markets-references in this study appears to be more educated and informed and as such, he further seeks information about the product.

Consumer groups

Overall, in all three reference countries wine consumption is found to increase with age and socio-economic status, women are a key consumer group, while imported wine consumption is nurtured in the creative urban centres. These findings hold true for the Greek wine market as well.

Consumers aged between 35 and 64 drive wine sales in all countries.

- In Germany those aged 35-50 are the most frequent wine drinkers; they show increased preference for imported wines compared to both younger and older age groups.

- In the US, baby boomers (aged 45-64) demonstrate the highest penetration of wine drinking; the fact that their number is expected to increase nearly 40% during the period 2003-2013, casts them as an even more promising segment. However, they tend to rely mostly on traditional winemaking countries.

Specifically in the US, two younger niches also show great potential.

- Millennials (14-31): spend one quarter or their alcohol budget on wine; follow a relaxed, «every day» and fun approach to wine; are open to all aspects of innovation and they experiment with lesser-known options; their number is expected to grow by 12 million by 2012. However, they are the most price-sensitive amongst age groups.

- 25-34s: older millenials and younger Generation X: more likely to spend more on wine than any other age group, especially the men; believe that expensive wine could offer premium quality; indicate high degree of involvement in the wine purchase. They are not as prone to experimenting as younger millenials, however, they are much more eager to shop at gourmet food retailers, specialists and wineries.

Upper-middle and upper socio-economic groups regardless of age are frequent wine drinkers. Such consumers are more likely to shop from upmarket retailers and specialists and online.

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- In the UK, more than 80% of ABs and over 70% of C1s are regular wine drinkers, while an impressive 45% and 31% belong to the heavy-user category.

- In Germany, three quarters of those earning over 3.000€ and above per month consume wine at least several times a week.

- In the US, imported wine consumption increases significantly among those with annual income above 75.000$.

Women are a key demographic in all 3 reference countries and Greece: they demonstrate higher wine consumption penetration than men; drink more regularly and prefer wine in an array of diverse occasions; are the main volume buyers both on- and off-trade. Women in Germany and the US have a stronger preference for white and rosé wines with fruity taste patterns. On the other hand, UK female consumers opt for reds.

However, women in the US and Europe claim that, despite their increasing influence on wine sales, they are still not acknowledged as wine connoiseurs and wine lists at restaurants are still handed to their mail companions[4].

Purchase behavior

In regards to their purchase behavior patterns, different rules apply to different countries:

- Type and varietal, brand and price, in that order, are the most important selection criteria for US consumers. They state that the average amount they spend for everyday wine is $13.5 per bottle, while for special occasions this rises to $24.3. Men tend to spend more per bottle.

- Price, brands and varietals are the most important factors in choosing wine for Germans, while place or origin seems to be important as well. Regarding the up-market consumer, two thirds of those shopping in high-end retailers and specialists, despite the high price sensitivity and the proliferation of discounting (average price per bottle €2.02), declare that they would pay 5-10€ for everyday wine and over €20 for special occasions.

- Varietal, price (discounts / promotions) and recommendations are considered important for UK consumers, who also prefer to rely on known brands, in an attempt to minimize perceived risk. Most consumers prefer to pay less than £5 per bottle, for everyday wine, while £5-9 is considered appropriate for special occasions.

- Awareness and familiarity (in terms of producer, brand, varietal) is the single selection criterion of foremost importance for Greek consumers. From this it becomes obvious that trust plays a key role, with price coming second. It must also be pointed out that taste character and palette do not

[4] http://www.winebrandsblog.com/2009/01/us-women-as-wine-consumers-in.html

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play a role in the majority of Greek consumer's wine purchase behaviour, an indication of low levels of wine culture and education in the market.

Competitive environment assessment

The following section presents an assessment of the wine market competitive environment for the 3 reference markets overall and Greece, using M.Porter's model of the five competitive forces.

According to this scientific model, the forces defining the competitive environment in each market in general are:

- Wine buyer power: Importers' and/or distributors' negotiating power
- Supplier power: Grapegrowers' and other suppliers' negotiating power
- Likelihood of new entrants: Possibility of new wine producers/exporters entering the market
- Threat of substitutes: Risk of wine being replaced by other beverages
- Degree of rivalry: Intensity of competition among wine producers/exporters in the market

For the purposes of the present study, wine markets are examined from the national wine offering's perspective, which includes branded and packaged wines from Greece.

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Five competitive forces in the wine market

Wine buyer power

Buyers in the wine market consist of importers and/or distributors, and in some cases include mega-retailers as well. Drivers that determine the level of wine buyer power in the market include:

Wine buyer power drivers Level of driver importance: Weak=1 Strong=5	**Reference country-markets**	**Greek market**
Buyer size	5	3
Buyer consolidation	5	3
Low-cost switching (among different wine producers or wine producing countries)	4	3
Undifferentiated product (higher scores suggest lack of differentiation)	3	4
Tendency to switch (among different wine producers and countries of origin)	5	3
Price sensitivity	4	4
Financial muscle	4	3
Backwards integration (buyers expanding their business portfolio to include wine products/ private labels)	3	3
Buyer independence	5	4
Product dispensability (higher scores suggest the product is non-critical to the buyer)	2	2
Buyer power assessment	**High**	**Moderate**

The ongoing consolidation trend in the importers /distributors side in all three reference countries, and backward integration of mega retailers, has increased buyers' negotiating power considerably, especially regarding the off-trade. Large scale players and multinationals have pushed prices down, and along with the consumers' discounting «addiction» especially in the UK and Germany, have further enhanced buyers' price sensitivity. The above affect the Greek market as well, though to a lesser extent.

The necessity to include wine in their portfolio, along with the product's differentiation according to origin, varietal, type etc, are weakening overall buyers' power. This is especially true for the domestic market, as buyers need to present a

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diverse and extensive greek wine offering due to its popularity among consumers. However, the increasing amount of players in the market as more and more countries are entering the wine map, is rather restricting this effect.

Supplier power

Suppliers in the wine market consist of providers of grapes and bottles. In the case of greek wine, those procedures involve domestic suppliers and are completed within the country.

Drivers that determine the level of supplier power in the market include:

Supplier power drivers Level of importance: Weak=1 Strong=5	**Reference country-markets**	**Greek market**
Supplier size	2	1
Supplier consolidation	2	1
Switching costs (degree of difficulty for the supplier to change customer)	2	2
Winemaker independence	1	2
Winemaker dispensability	4	2
No substitute inputs (grapes, bottles etc.)	5	5
Importance of quality/ cost	4	4
Differentiated input (higher scores suggest the existence of differentiated supplier offerings)	3	3
Forward integration (suppliers expanding their business portfolio to include wine products/ private labels)	2	1
Supplier power assessment	**Moderate**	**Moderate**

Traditionally, winemakers operate vertically-integrated businesses, from vine growing, to winemaking, to bottling. In several cases, own grapes are used for premium products, while third-party inputs are used for lower-priced wines. However, this in not the case for Greek wine producers who usually buy their grapes from a large number of small independent (local) growers. The quality of the grape is of major importance, while differentiation in terms of terroir, varietal, growing method (i.e. organic, biodynamic, fair trade) is increasing in parallel with emerging consumer trends for authentic experiences, environmental and health concerns.

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Likelihood of New Entrants

New Entrants in the wine market consist of new national wine offerings and their corresponding wine producers. Drivers that determine the likelihood of new entrants in the wine market include:

Likelihood of New Entrants drivers Level of importance: Weak=1 Strong=5	**Reference country-markets**	**Greek market**
Low-cost switching among wine producers (degree of difficulty for buyers and consumers to switch between wine offerings)	4	5
Undifferentiated wine product (higher scores suggest lack of differentiation)	2	2
Scale unimportant (higher score suggest winemakers size is non critical)	3	4
Low fixed costs	3	4
Little regulation	3	3
Distribution accessible (higher scores suggest that distribution is easily accessible)	2	4
Suppliers accessible	3	3
Little investment involved	4	3
Weak wine brands (higher scores suggest the absence of strong wine brands in the market)	2	1
Market growth	4	2
Likelihood of new entrants assessment	**Moderate**	**Moderate**

In all 3 reference countries and Greece, alcoholic beverages imports must adhere to legislation requirements. These are even stricter in the EU countries, Germany, the UK and Greece, where imports from third countries must be accompanied by several documents such as the Common Agricultural Policy import license and the VI1 doc, are subject to several duties, such as import, excise and VAT. Specifically in the US the three-tier system and its complexities (analysed in the corresponding section) are posing further barriers to entry.

The consolidation trend among buyers and retailers has increased their overall negotiating power and reduced wine producers' access to effective distribution channels. This, in conjuction with the multinationals' undefiable competence in cost-leadership, have amplified the need for scale economies in order for wine exporters to compete effectively, thus considerably lowering their profit margins. This shift had a substantial impact to small and medium players, who enter the market on a small scale trading high quality wines, as such products can still be sold at premium prices.

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Threat of Substitutes

Substitutes include not only other alcoholic beverages, but also private label wines. Drivers that determine the threat of wine substitutes in the market include:

Threat of Substitutes drivers Level of importance: Weak=1 Strong=5	**Reference country-markets**	**Greek market**
Low-cost switching for buyers and consumers between wine and directly competitive beverages	5	5
Existence of cheaper alternatives to wine	4	3
Existence of beneficial alternatives to wine	3	1
Threat of Substitutes assessment	**High**	**Moderate**

Even though the growing trend for health and wellness has positively influenced demand for wine, it has also fuelled the introduction of a vast array of new beverages, directly competitive to wine. As a result, substitutes today, apart from other alcoholic beverages or even sparkling water (as in the case of Germany), consist as well of a whole new range of low-calorie, alcohol-free, breezer-like, even functional products based on wine.

Additionally, mega-retailers consolidation and backward integration in conjuction with the consumers' demand for low-budget products, has resulted in numerous wine private labels. Specifically, according to Business Insights 2008 report «Future Trends in Beer and Wine», private labels as a whole have the largest share of wine sales both in the Americas (9%) and Europe (25%).

In the context of the Greek market, cheap and beneficial alternatives to wine have not yet built momentum; yet, their importance is expected to grow in the near future, given the escalating health and environmental concerns. Private labels sales are on the rise, representing almost 13% by volume and 6.7% by value in supermarket sales.

As far as buyers are concerned, switching costs are not high, however, certain retail channels such as specialists or the on-trade would find it difficult to operate without wine in their portfolio. Regarding end consumers, although wine is perceived as a differentiated product, however, health concerns and personal taste strongly influence purchase behavior. Greek consumers demonstrate a sense of national pride, and even though are currently starting to experiment with foreign wine offerings, they hold great appreciation and preference for domestic products.

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Degree of Rivalry

Drivers that determine the degree of rivalry among wine players (wine makers/ wine exporters) in the market include:

Degree of Rivalry drivers Level of importance: Weak=1 Strong=5	**Reference country-markets**	**Greek market**
Competitor size (wine makers/ wine exporters size)	5	4
Number of players	5	5
Low-cost switching for buyers and consumers between wine and directly competitive beverages	5	5
Undifferentiated product (higher scores suggest lack of differentiation)	2	2
Low fixed costs	3	3
Easy to expand	3	2
Hard to exit	2	2
Lack of diversity	4	2
Similarity of players	4	3
Storage costs	4	2
Zero-sum game (player's gain or loss is exactly balanced to competitors' gains or losses)	4	5
Degree of Rivalry assessment	**High**	**Moderate**

Consolidation among wine producers and the advent of multinational players have magnified competitors' size, hence boosting rivalry. At the same time, the number of players continues to increase, as New World countries enter the wine map, partly aided by climate change. On the other hand, product differentiation based on origin, varietal and other grounds, as well as strong brands in certain cases seem to restrain competition growth.

Recent developments illustrate the internet as a new opportunity for expansion (even for the strictly regulated US market), significant for smaller players.

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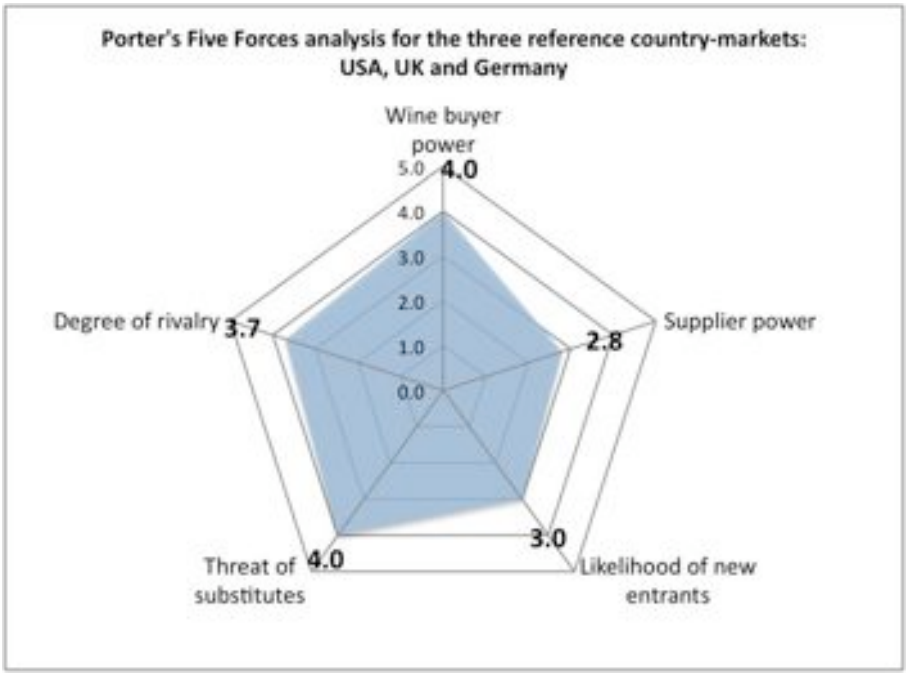
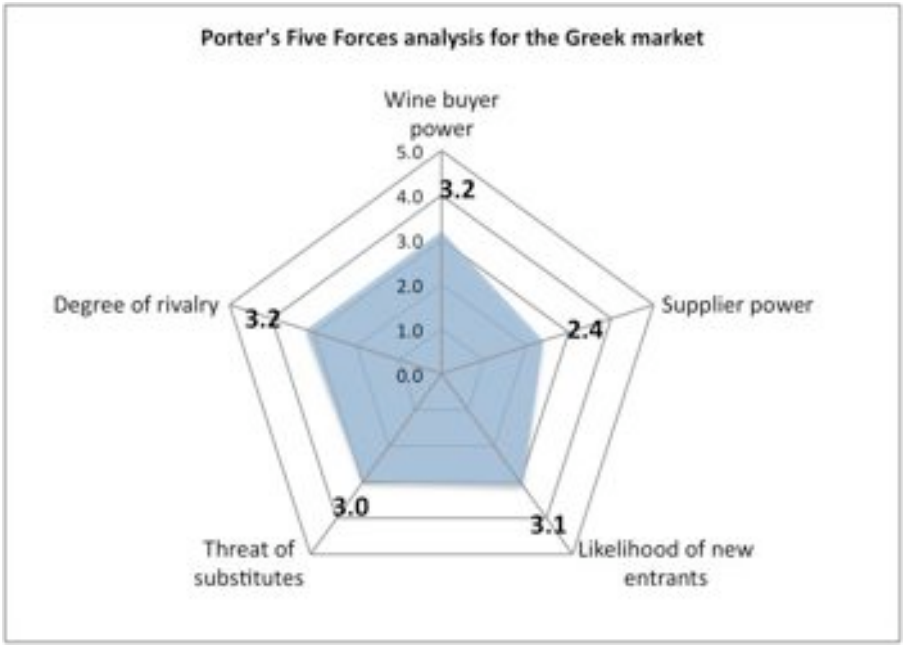
The overall assessment of the competitive environment is **High (3.5)** for the three reference markets and **Moderate (3.0)** for the domestic market and expected to increase further in the future.





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USA

Demonstrating a robust domestic wine sector, USA has been exhibiting an unprecedented growth as a wine market, a recent development documented by impressive sales. In terms of wine consumption volume, today the US wine market is:

- the world's third largest market by volume in the Still Light Wines category, with wine consumption reaching 274.1 million 9L cases in 2007[5], 11.2% on the world's total, forecasted to rise to 280.3 million 9L cases in 2008, ranking behind the two traditional wine markets, France and Italy
- the world's third largest market by volume for imported wine, with consumption reaching 77.6 million 9L cases in 2007 (more than 12% on the world's total), ranking behind Germany and United Kingdom
- The world's leader in terms of annual growth of imported still light wine consumption, with an increase of 11.6% between 2005 and 2007 which corresponds to an actual 7,200 9-lt cases

USA's significance as a market for imported wine is further endorsed by its value-creating potential, as it trades more volume in the above $5 price segment than any other market among the top10 attractive wine markets identified by the Attractiveness vs Competitiveness study, realised within the scope of the project.

In addition to the above, the US wine market during the last decade has built the strongest trend-setting and influence capacity in the world, as the home for 29 out of the top 50 global public rhetoric and knowledge sources for wine (identified in Wine Sector - Global Public Rhetoric & Knowledge Sources study). Succeeding in the US will gradually be an even more determining factor, which could "make or break" any wine brand's potential to compete on a global level.

All aspects of the US market, critical to understanding the diversity of its consumers and the complexity of its structure, have been analysed and are presented in the sections that follow.

[5] IWSR, US index, June 2008

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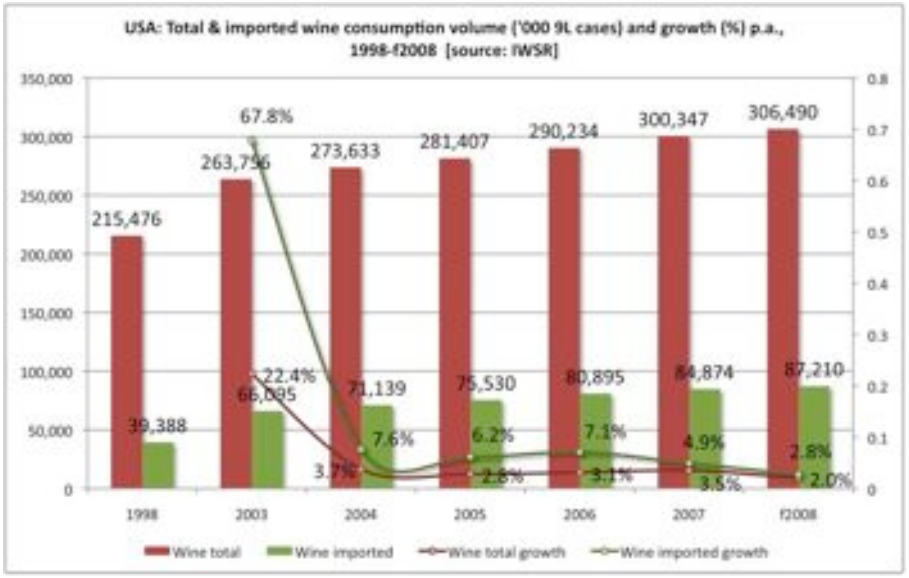
Market profile

Market size

In terms of volume, the US Total Wine market[6] reached a size of 300,347 '0009L cases in 2007, going up by 3.5% on the previous year. The market is expected to grow even further in 2008, reaching 306,490 '0009L cases, an annual increase of 2%, as illustrated in the following graph:



Source: Based on data provided by *IWSR, US Index, June 2008*

In the period 1998-2003 the market increased its size at an accelerated rate of 22.4% overall; this has been kept relatively stable from 2004 to 2007, especially when considering the market's size. The forecasted slow-down in growth for 2008, however, reflects the effect of the current global economic crisis in the market.

US market growth has been attributed to an array of changes in the wine landscape. First of all, the domestic industry's efforts managed to position wine as an every-day drink in the American consumer's mind. Moreover, as with the case of the UK, the advent of low-price, good quality, easy to understand New World wines has popularised the product, making it accessible to most. In addition to the above, the wider knowledge regarding the associated health benefits of wine, in conjuction with its availability across a variety of channels have been further promoting the upward trend. Going forwards, industry sources expect the market to grow even more by 32% in current prices for the period 2008-2013.

[6] The wine market includes consumption across the (i) Still Light Wines, (ii) Sparkling Wine (iii) Fortified wine, (iv) Light Aperitifs and (v) Other wine categories

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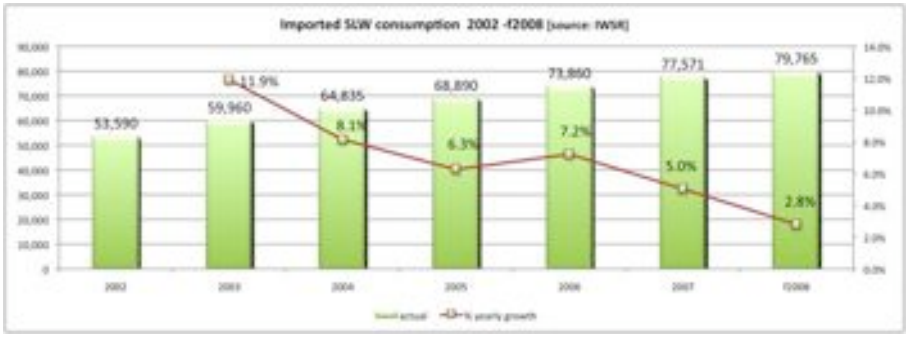
Imported wine

In 2007, imported wine[7] consumption reached 84,874 '0009L cases, an annual increase of 4.9%. The growth is forecasted to drop to 2.8%, closing the gap between total and imported wine volume growth from 4% in 2006 to 0.8% in 2008, leading to an expected imported volume of 87,210 '0009L cases.

Within the broad market enviroment that favored wine consumption, imported wines have clearly outpaced domestic sales, for the total of the past decade. Between 1998-2003 imported wine consumption in terms of volume demonstrated an impressive growth of 67.8%. Following the upward trend, the corresponding growth for the period 2003-08 was sustained at 33%, compared to a mere 12% growth for the domestic wine consumption over the same period.

Still Light Wine

Still Light Wines represent 91.3% of all wine and imported wine consumption in the US (2007). With regards to the SLW category, imported consumption volume and growth are following the same evolution pattern with the total imported consumption, as shown in the following graph:



Source: Based on data provided by *IWSR, US Index, June 2008*

In terms of value, the market reached €24bn ($31bn) in 2007[8], an annual 5.8% increase in actual terms. The forecast for 2008 is a further increase of 5% to €25.3bn ($32.6bn). Growth rates for 2007-08 have been below the average annual rate of 6.9% for the past five years; still, value has grown at a consistently faster pace than volume, indicating a demand for more expensive products and higher-margin business for competitors.

As with the case of the UK, despite the economic crisis, higher value wines have been performing well and premium and super-premium wines (>$9/bottle, ex. sales tax) together account for approximately 1/3 of the total retail table wine sales for

[7] Imported wine consumption across all wine categories, as defined in the Market Size section earlier
[8] Mintel, Wine US, October 2008

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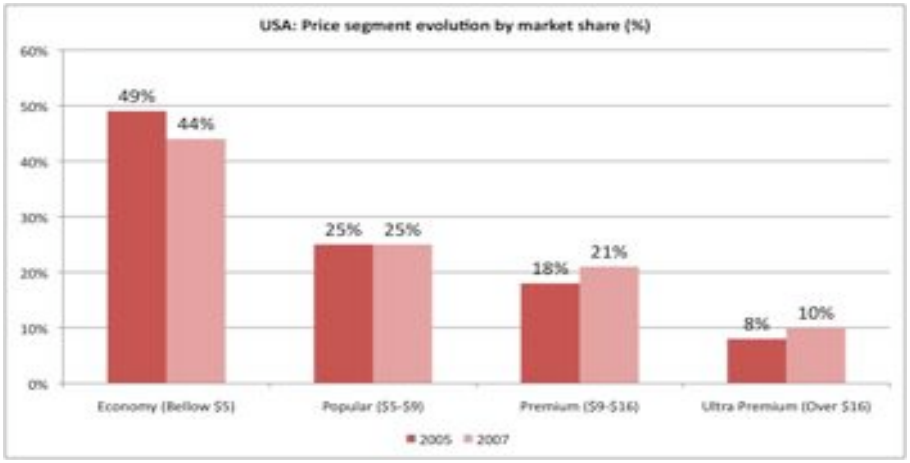
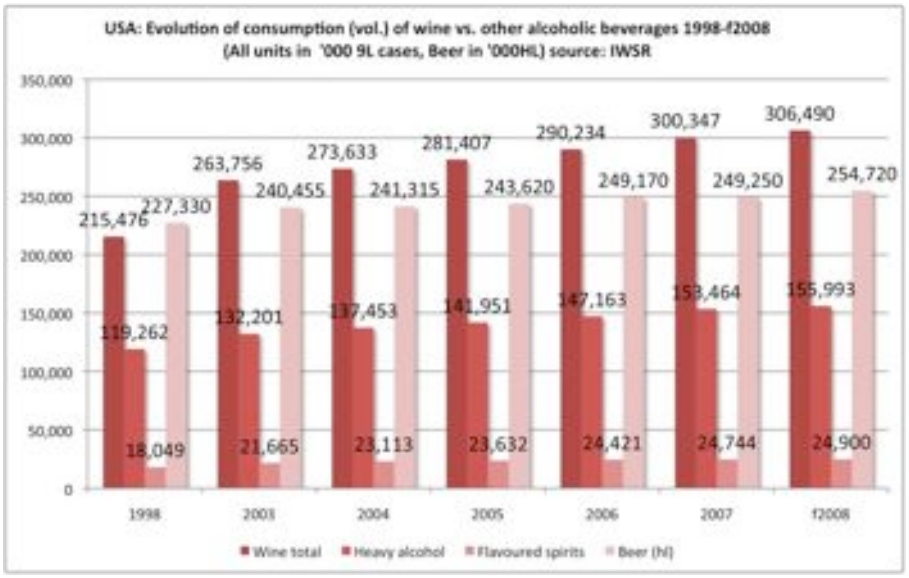
2007[5] . The following graph illustrates the growing importance of the higher price segments for the US market:



Source: Based on data provided by *IWSR, US Index, June 2008*

Wine consumption evolution vs. Consumption of other alcoholic beverages

The following chart shows evolution of consumption volume for key alchoholic beverages in the US[10]:



Source: Based on data provided by *IWSR, US Index, June 2008*

[9] Wine includes all wine (domestic and imported); Heavy alcohol includes whisky, white spirits, rum and brandy; Flavoured spirits include liqeurs, bitters, spirit aperitifs, aniseed and fruit aux de vie.

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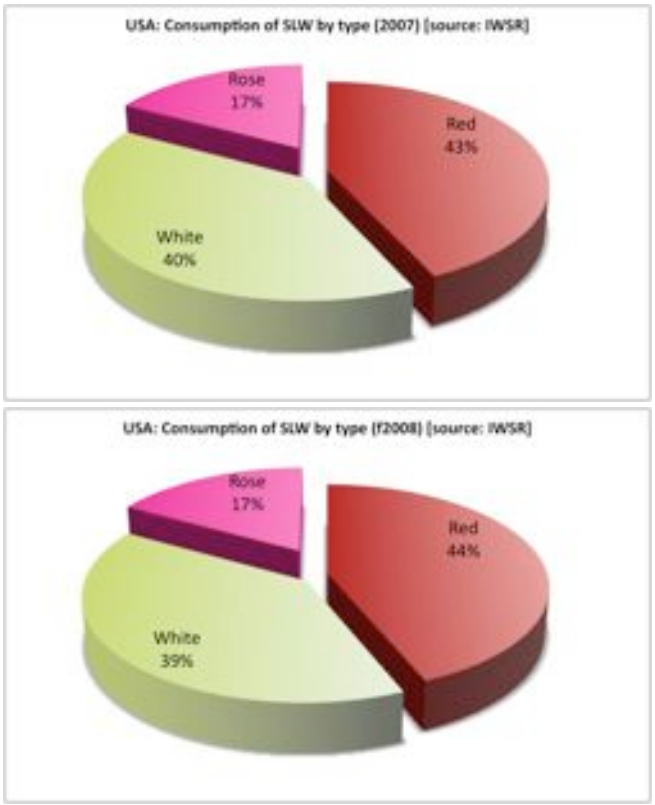
The increase in wine consumption does not appear to be the result of a switch of consumer preferences from other alcoholic drinks, as all four main categories appear to be growing.

Heavy alcohol grew by 4.2% in 2007 and 2008 volumes are expected to be over 30% higher than a decade ago. Flavored spirits have been growing albeit with a much smaller rate of 1.3% for 2007. The category's forecasted volumes for 2008 will be 38% higher than in 1998; This rate is higher than the corresponding rate for the heavy alcohol category, which has however a much larger base size.

Beer, the most popular alcoholic drink in the US, is being outpaced in growth by wine. With a stable performance in 2007 and a forecasted growth of 2.2% for 2008 beer is facing strong competition from wine, which is being increasingly accepted as an every-day drink and hence a possible substitute product.

Red vs. White consumption

Red and and white wines have an approximately equal share on consumption by quantity, with the scale slightly tipped in favor of red:



Source: Based on data provided by *IWSR, US Index, June 2008*

It is important to notice the share of Rosé wine at 17%, which is far greater than the share of rosé in the other key markets (UK – 7%, Germany 10%)

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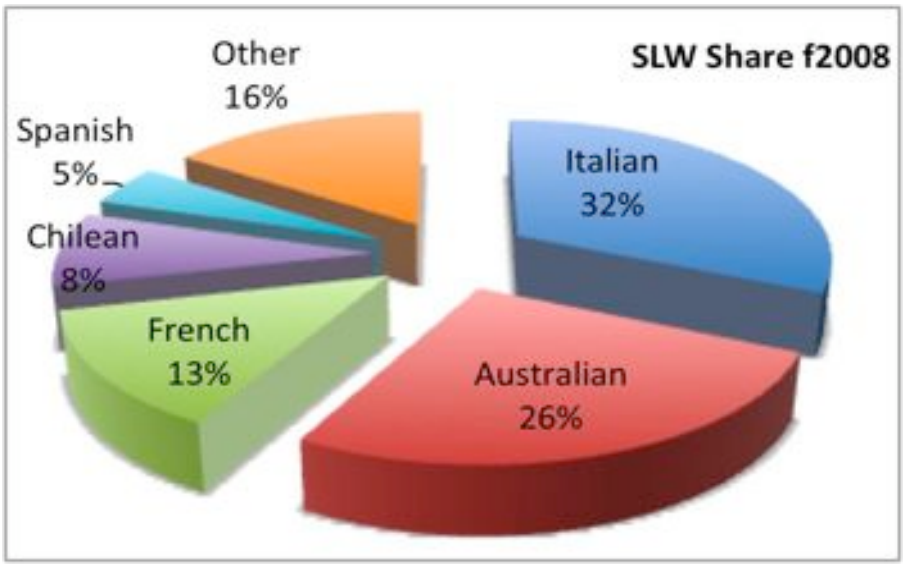
Consumption per country of origin

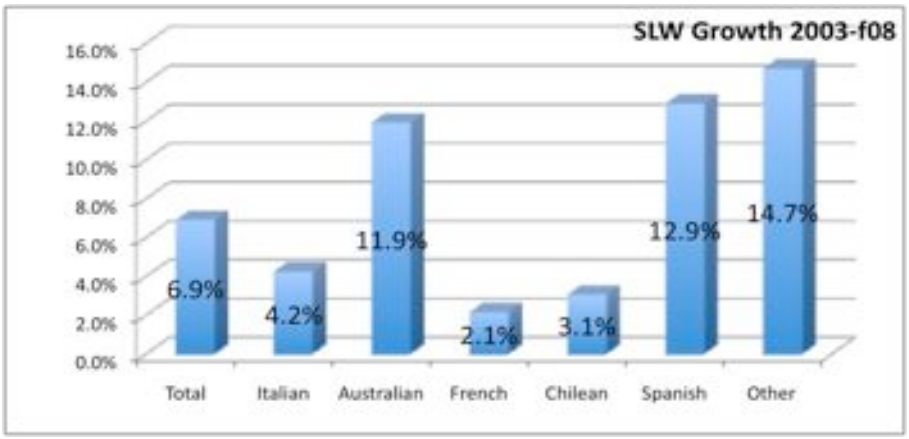
Market role analysis[11]

Italian wines are currently the category leader for SLW in the US market representing a 32% share on total consumption, followed by wines from Australia, France, Chile and Spain:



Source: Based on data provided by *IWSR, US Index, June 2008*

Australia is a strong challenger with 26% share and a growth rate about 3 times bigger than Italy's, as seen in the following graph:



Source: Based on data provided by *IWSR, US Index, June 2008*

[11]- 2002-2006 data taken from IWSR Global Wine Handbook 2008.
- 2007 - f2008 data taken from IWSR USA INDEX report 2008

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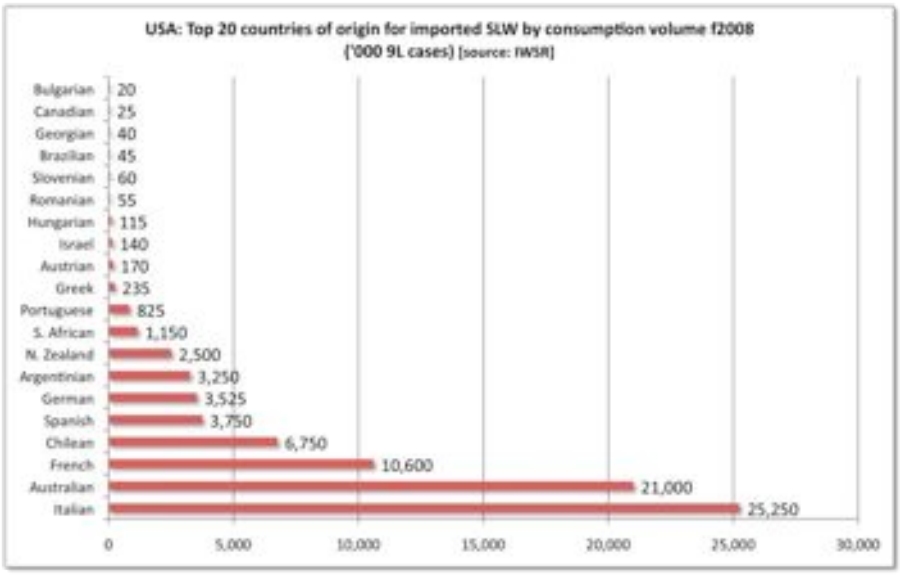
Italy's SLW is growing at a rate lower than the average and hence losing share to players such as Australia and Spain. With regards to the latter, the strategic focus of Spain in the US market seems to be reaping rewards and allows for Spanish wine to slowly move out of their niche position into a more mainstream role. Chilean wines have an important share as well.

What must be observed is that a large piece of the pie (16%) is other, smaller niche players, which however appear to be growing at a very quick pace. This clearly indicates the significance and attractiveness of the US market for the international wine industry.

The rest of the competition

The following graph takes a closer look at the 16% of «Other» players competing in the US market:



Source: Based on data provided by *IWSR, US Index, June 2008*

Aside from the main players, Germany, Argentina, New Zealand and also South Africa and Portugal as well form a tier of countries that are building a solid sales volume base, which may be the launching pad for future performance. Spain in fifth place is only 500 '000 9L cases bigger than Argentina down in 7th place and, considering the market's room for growth, this clearly illustrates the intensity of competition.

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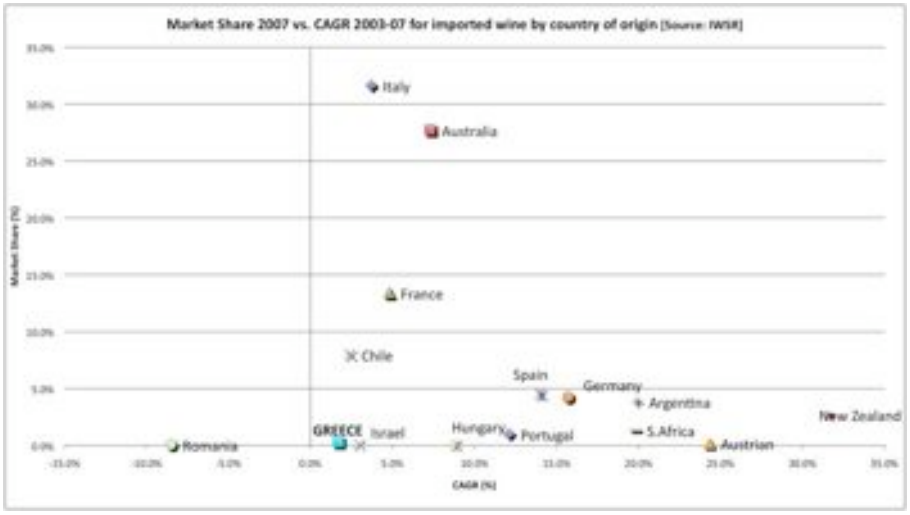
The following chart ploting market share vs. growth[12] for key players offers more insight on the international competition in the US wine market:



Source: Based on data provided by *IWSR, US Index, June 2008*

New Zealand has a small share but by far the steeper growth rate in the market, promising further growth over the next years. The same holds true for Austria, South Africa and Argentina, all countries that primarily focus their efforts towards the US market. With only Romania displaying decline, it is clear that this is a fast-growing market and a big opportunity.

[12] Growth here is measured as the Compound Average Growth Rate (CAGR): CAGR is the geometric mean growth rate on an annualized basis and it represents the smoothed annualized gain/loss achieved over the entire period in question. CAGR dampens the effect of volatility of periodic gains/losses that can render arithmetic means irrelevant, and is calculated by the formula:

$$\mathrm{CAGR}(t_0, t_n) = \left(\frac{V(t_n)}{V(t_0)}\right)^{\frac{1}{t_n - t_0}} - 1$$

where $V(t_0)$: start value, $V(tn)$: finish value, $tn - t_0$: number of years.

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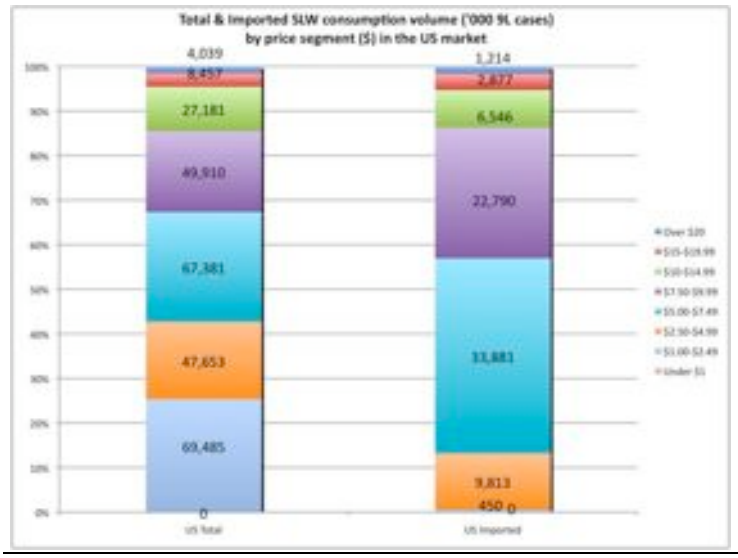
Consumption per price segment

The following graphs shows consumption volume per price segment[13] in the US market, both for total and imported wine:



Source: Based on data provided by *IWSR, US Index, June 2008*

Imported wine is virtually non-existent in the below $2.49 tier, indicating that the 25% of total wine that falls in this tier is all domestic. Foreign wine has a strong presence in the $7.00 - $9.99 segment and leads sales in the premium wine price tier. Overall, the US has a balanced price structure and offers room for growth for wines pursuing both a value/economy approach as well as wines directed to more affluent/gourmet audiences.

Major brands in each price segment

The following table lists the biggest brands by volume for each price bracket, both domestic (US) and international:

Country of Origin	Brand	Importer	Quantity 2007 ('000 9Lt Cases)	Indicative Price (€, Jun2008)
US	Jackson Family Farms/ Estates	Kendall Jackson	175.00	Over $20
US	Stags Leap	Beinger Wines	150.00	
US	Kendall Jackson	Kendall Jackson	135.00	
US	Sterling	Diageo	130.00	
US	Gallo Sonoma Estates	E&J Gallo	95.00	

[13] Prices are retail shelf prices based on retail audits conducted in leading supermarkets

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Italian	Santa Magherita	Terlato	95.00	
Italian	Ruffino Gold Ris: Duc:	Constellation	90.00	
Italian	Villa Banfi	Banfi	85.00	
Italian	Antinori	Chat. Ste Michell	45.00	
Australian	Penfolds	Beringer Wines	43.00	
US	Kendall Jackson	Kendall Jackson	625.00	$15.00 - $19.99
US	BV Beaulieu	Diageo	290.00	
US	Sonoma Cutrer	Brown-Forman	240.00	
US	Simi	***Franciscan estates***	210.00	
US	Clos du Bois	Constellation	209.00	
Italian	Santa Magherita	Terlato	480.00	
Italian	Ruffino	Constellation	190.00	
Italian	Villa Banfi	Banfi	175.00	
French	Louis Jadot	Kobrand	125.00	
italian	Villa Antinori	Chat. Ste Michell	95.00	
US	Kendall Jackson	Kendall Jackson	2,070.00	$10.00 - $14.99
US	Clos du Bois	Constellation	1,670.00	
US	Chateau Ste Michelle	Ste. Michelle Wine Estates	1,140.00	
US	Beringer	Beringer Wines	1,100.00	
US	Sterling	Diageo	800.00	
Australian	Greg Norman	Beringer Wines	430.00	
Italian	Villa Banfi	Banfi	180.00	
Australian	YellowTail Reserve	WJ Deutch	175.00	
Australian	Wolf Blass	Beringer Wines	165.00	
Chilean	Veramontes	Franciscan estates	160.00	
US	Beringer	Beringer Wines	2,995.00	$7.50-$9.99
US	Smoking Loon	Don Sebastiani	1,880.00	
US	Turning Leaf	E&J Gallo	1,500.00	
US	Redwood Creek	E&J Gallo	1,400.00	
Chilean	Concha Y Torro	Banfi	1,800.00	
Italian	Bella Serra	E&J Gallo	1,400.00	

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Australian	Little Penguin	Beringer Wines	1,135.00	
Italian	Luna di Luna	AV Imports	705.00	
Italian	Ecoo Domani	E&J Gallo	695.00	
Australian	Jacobs Creek	Pernod Ricard	680.00	
US	Robert Mondavi Woodbridge	Constellation	5,810.00	
US	Barefoot	E&J Gallo	2,820.00	
US	Beringer	Beringer Wines	2,795.00	
US	Sutter Home	Trinchero Estate	2,110.00	
US	Vendange	Constellation	1,800.00	
US	Turning Leaf	E&J Gallo	1,700.00	$5.00-$7.49
Australian	YellowTail	WJ Deutch	7,975.00	
Italian	Riunite	Banfi	2,075.00	
Australian	Lindeman's	Beringer Wines	1,820.00	
Italian	Cavit	Palm Bay	1,585.00	
Australian	Black Swan	E&J Gallo	1,120.00	
US	Sutter Home	Trinchero Estate	6,010.00	
US	Twin Valley	E&J Gallo	5,075.00	
US	Arbor Mist	Constellation	4,050.00	
US	Foxhorn	The Wine Group	2,950.00	
	Corbett Canyon	The Wine Group	2,750.00	
Italian	Citra	Palm Bay	930.00	$3.00-$4.99
Italian	Casarca	The Wine Group	925.00	
Argentinian	Marcus James	Constellation	330.00	
Italian	Reunite Lambrusco	Banfi	285.00	
Italian	Straccali	Palm Bay	265.00	
Australian	Banrock Station	Constellation	195.00	
US	Franzia	The Wine Group	22,500.00	
US	Carlo Rossi	E&J Gallo	9,830.00	
US	Almaden	Constellation	7,575.00	Below $2.99
US	Livingston	E&J Gallo	6,605.00	
US	Peter Vella	E&J Gallo	5,850.00	

Source: Based on data provided by *IWSR, US Index, June 2008*

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From the above table, the following observations can be made:

- US wines appear to have a higher degree of concentration to a small number of key brands when compared to international wines which, in the majority of cases, sell a number of brands with similar volumes for each price bracket
- Mega-brands exist both at brand, and supplier / importer level. Examples of brands include Beringer, Clos du Bois, Kendall Jackson, Ruffino, Santa Magherita, Sterling, Sutter Home, Villa Bafi, Turning leaf and YellowTail which feature products in more than one price segments
- In relation to the previous point, the top brands in the US market are marketed by a small number of players (producers and/or importers) with high shares, namely E&J Gallo (29%), The Wine Group (22%), Constellation (16%) and a cluster of smaller places with shares 1%-8%, namely Beringer wines, Banfi, Kendall Jackson, Palm Bay and Diageo.
- With regards to the ultra-premium and premium price segments for imported wines, Italian wines hold almost all the top 5 selling brands

Appendix A provides top-line brand analysis profiles for the top selling producer brands (in the US, UK and German markets) segmented by country of origin. Each brand analysis form features brand name, signature, tagline and basic imagery for each of the wineries as well as their corresponding flagship product brands.

Market structure

The three-tier sales system

The US wine market follows a very specific «three-tier» distribution and sales system to cater for the needs of both Federal and State laws. The three-tier system requires that suppliers must sell to wholesalers who in turn must sell to retailers at predetermined mark-ups.

Federal US laws regarding wine regulate the production, importation, packaging and marketing of wine only. Each State has its own laws governing the sales of wine, to the degree that these do not compromise any Federal laws.

With regards to control of distribution, at present there are 18 «alcoholic beverage control states» that hold state monopoly over the wholesaling and/or retailing of some or all categories of alcoholic beverages. These states are Alabama, Aidaho, Iowa, Maine, Michigan, Mississippi, Montana, New Hampshire, North Carolina, Ohio, Oregon, Pennsylvania, Utah, Vermont, Virginia, Washington, West Virginia and Wyoming.

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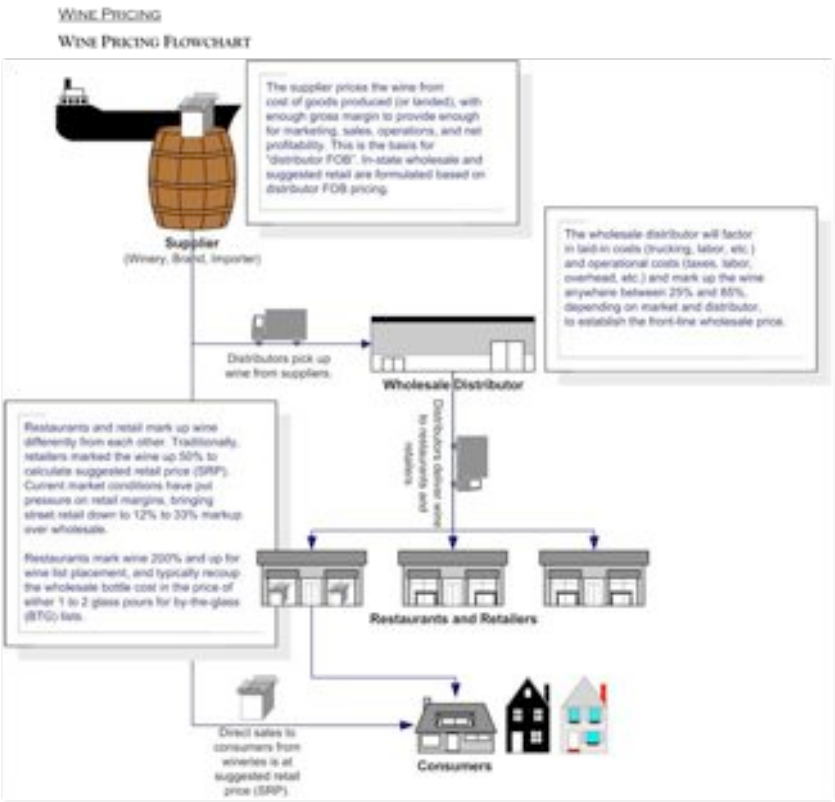
The following illustration shows how the three-tier system works and how it shapes wine prices in the US:



Source: *US Wine Market and Three-Tier Sales Channel Overview*, Tincknell & Tincknell

National sales

This is concerning the sale of wine from any type of supplier (winery, other producer or importer) to a wholesale distributor, which may be either in-state or out-of-state. At this point, distributor FOB prices are set by the supplier to cover for cost of goods, marketing, sales, operations and the supplier's net profitability. The wholesale distributor in turn will mark up the wine between 25%-85%, taking into account laid-in and operational costs, to establish the front-line wholesale price. Suppliers can affect the wholesale price through their own FOB pricing and possible discounts but cannot dictate it to the wholesaler.

This tier may also engage a regional broker (often payed by commission), to facilitate sales and provide marketing support to a group of distributors. It must also be noted that a supplier must be compliant in each state they sell according to individual state regulations, which may vary greatly between states.

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Main importers and brokers

The US has over 3,000 importers and brokers, which are handling both domestic and imported brands; some of the most important of which are presented in the table that follows:

Large sized companies	
	Frederick Wildman (**www.frederickwildman.com**) Self-proclaimed as "the oval of quality", Frederick Wildman is the third largest importer in the US. The company focuses on fine-quality wine.
	Empire merchants (**www.empiremerchants.com**) Empire claims to be the "largest and most successful beverage distributor in Metro New York". The company sells premium and up-market wines, spirits, champagnes, cordials, and serves all of Metro New York's licensed stores and on-premise locations.
	Southern Wines & Spirits (**www.southernwine.com**) Operating across 30 states, Southern is the country's largest wines and spirits distributor. The company boasts its exceptional level of customer service, its local and global knowledge of the industry and its ability to build brands and especially to "nurture sales of new premium wine and spirits products".
	Kobrand Corp (**www.kobrandwineandspirits.com**) Kobrand focuses on fine wines and spirits which are "critically and comparatively chosen as the finest examples of their types". The company's three cornerstones are quality of product, quality of people and quality of relationships.
	Winebow The company's portfolio includes in excess of 3,000 wines from all over the world and distributes in New York, New Jersey and also in Pennsylvania and Washington DC. Under the Leonard Locascio, label, Winebow claims to be "America's leading importer of premium Italian wines".
	Terlato Wines International (ex. Paterno, **www.twg.com**)

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	The company represents more than 50 brands, covering the world's finest wine regions, varietals and styles. Terlato claims to be the "leading marketer of luxury wines in the United States, marketing more than one out of eight bottles of wine over $14 sold in America"
PALM BAY INTERNATIONAL	Palm Bay International (**www.palmbay.com**) Ranking amongst the country's top importers, the company holds a portfolio of 80 internationally recognised wine producers from 11 countries
BANFI VINTNERS	Banfi Vintners (**www.banfivintners.com**) The company focuses on the production and import of its own wine from Italy, as well as the import of wines of other producers, predominanently from Italy but also from Chile and Australia. According to Banfi, the company has been ranked as the nation's leading wine importer for more than three decades.
CRILLON	Crillon Importers (**www.crillonimporters.com**) The company imports and markets premium spirits from around the globe
Medium and small-sized companies	
Dreyfus, Ashby & Co.	Dreyfus, Ashby and Co (**www.dreyfusashby.com**) Headquartered in New York City, Dreyfus, Ashby is a national importer and marketer of a carefully chosen portfolio of fine wines and spirits. The company markets its products in all fifty states through a network of wholesale customers.
W.J. Deutsch & Sons, Ltd. fine wine merchants	W.J. Deutsch (**www.wjdeutsch.com**) The company markets quality wines produced by prestigious families from major wine regions of the world
MAISONS MARQUES & DOMAINES	Maisons Marques & Domaines (**www.mmdusa.net**) A niche importer and marketer of family-owned, prestigious wine producers

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	Shaw Ross (www.shaw-ross.com) The company holds a diversified wine portfolio with wines from the US, Chile, Argentina, Spain, France, Italy, Germany and South Africa, focusing on growing more its premium end.
	Wilson Daniels / Infinium Spirits (**www.wilsondaniels.com**) The latter is the evolution of the Wilson Daniels spirits business. This is a niche importer and marketer with a selective portfolio of the world's "most prestigious wine proprerties"
	Michael Skurnik Wines (**www.skurnikwines.com**) A niche importer and distributor of "the finest estate-bottled wines from around the world". The company represents and imports 450 estates from the US, France, Italy, Germany, Austria, Australia and other countries and distributes to NY, NJ and Connecticut.
	Martin –Scott (**www.martinscottwines.com**) Focusing on the markets of NY, NJ and Connecticut, the company focuses on importing and distributing fine wines from the world's most prestigius regions.
	Polaner (**www.polanerselections.com**) Polaner works with wines that offer excellent quality at all price points and offers "new tasting experiences" by introducing wines from lesser known varietals and regions of the world.
	Vias Imports (**www.viaswine.com**) Specialised importer of Italian wines with own distribution across NY and NJ and a network of 61 distributors supplying all other states.
	Monsieur Touton (129 W 27th St, New York, NY) Focuses mostly on Italian wine.
	Vos Selections (**www.vosselections.com**) An importer and distributor of fine wines, spirits and sakes to top-end on- and off-traders in the NY metropolitan area.

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	TGIC (**www.tgicimporters.com**) Focusing on wines from Chile but also selling wines from around the world, the company imports and wholesales premium quality wines.
	Pasternak (**www.pasternakwine.com**) Importer of spirits and fine wines which are both "exceptional in quality and value" from France, Spain, Portugal, Australia, New Zealand, Argentina, Chile and California.
	Jorge Ordonez -
	Wimbledon Wine (**www.wimbledonwine.com**) Niche company representing estate winery brands from California and New Zealand. Wimbledon has its own wine club and wine shop.
	Vintus (**www.vintuswines.com**) The company features a focused portfolio of exceptional, family-owned, estate-based producers of hand-crafted wines. The company sells through a network of distributors across 44 states and the Carribean.
	Kermit Lynch (**www.kermitlynch.com**) Family-owned, niche importer and distributor of French wines
	Louis/Dressner (**www.louisdressner.com**) Importing company self-proclaimed as "a portfolio of vignerons from France, Italy and Portugal". The company does not focus on brands but on honest, authentic, hand-crafted wines.
	Artisan wines (**www.artisanwines.ca/**) The company imports high-quality, hand-crafted wines from small production estates and distributes to boutique wine shops and restaurants.

Wholesale sales

Wholesalers are responsible to sell wines to both on-trade and off-trade accounts. It is possible for a supplier to also hold a wholesale license and sell directly to the

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trade, or sell with the help of a broker. Likewise, a wholesaler may posess an importing license and import wines directly, provided that the state law allows it.

Wholesalers may be multi-state companies but the company's division for each state is independently managed and run. Additionaly, it is not mandatory for a multi-state distributor to carry a supplier's products in every state they operate. Distributors and brokers are regulated by the state in which they operate.

Typically, distributors are legally prohibited from or opt not to sell directly to consumers.

Direct sales

These are sales direct by a supplier to the end-consumer, without the intervention of the wholesaler and retailer tiers. Direct sales are regulated by each state and they include tasting rooms, retail operations, consumer events, supplier-managed wine clubs or subscription sales, direct mail, telephone and internet sales.

Prices through this channel are set based on traditional, industry-standard mark-ups, to create a national «Suggested Retail Price»; the SRP however cannot be enforced through the three-tier channel. In most cases, the SRP will be higher than most street prices for any wine.

Direct sales in-state and out-of-state are regulated by the state where the consumer makes the purchase. Direct sales vary in legality between states and in some cases even between counties within states.

There has been a gradual loosening of restrictions on direct-to-consumer shipments of wine, resulting in increased on-line and on-site winery sales. As of June 2008, there are still 15 states that prohibit residents from buying and shipping wine from out-of-state wineries, namely Alabama, Arkansas, Delaware, Kentucky, Maine, Maryland, Massachusetts, Mississippi, Montana, New Jersey, Oklahoma, Pennsylvania, South Dakota, Tennessee and Utah.

Industry organisations such as The Wine Institute and Free the Grapes are working towards the elimination of such restrictions, aiming to enable consumers in all states to purchase and ship wine directly from wineries and retailers.

As the growing consolidation trend is making it increasingly difficult for smaller, independent producers to gain distribution and compete effectively, online direct-to-consumer sales, are presenting a promising window of opportunity for small- to medium-sized suppliers.

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www.wineinstitute.org

Legalities & Responsibilities

Out-of-state wholesalers and manufacturers must hold out-of-state shipper's licence and they are responsible for registering the brands in the desired destination states. As previously discussed, they are also responsible for setting the wholesaler price based on the supplier's FOB price. Additionaly, it may be required to appoint a wholesaler in the destination state if they do not operate themselves. The wholesaler must also file the «primary source» certification and is responsible for complying with the destination state's laws.

In-state suppliers/importers must hold the federal basic permit and state license for the product. It must also obtain COLA[14] and must be listed on the wine's label. The in-state wholesaler responsible for the distribution (which can also be the supplier/ importer) must hold the federal basic permit and state license and has the sales force that delivers the product to the retailers.

Finally, retailers must hold the state (not federal) license for selling wine.

[14] Certificate Of Label Approval

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The complexity behind the three-tier system

Although with a first look the three tier system appears to be straight-forward in its execution, complexity arises in practise:

- Importers may in some cases acquire/ merge with distributors, in order to possess a distribution license.
- Importers work in many occasions with more than one distributors. This may be essential for selling out-of-state, as not all distributors have licenses for all states, but it is also the case that importers work with more than one distributors serving the same state.
- Imports directly to distributors: due to the geography and the taxation and logistics expenses associated with wine being transported across-states, producers/suppliers may choose to invoice the importer but ship their products directly to its partner distributors in every state.
- Interstate shipments from wineries (and retailers) using a common carrier is still prohibited across 15 states, namely Alabama, Arkansas, Delaware, Kentucky, Maine, Maryland, Masachusetts, Mississippi, Montana, New Jersey, Oklahoma, Pennsylvania, South Dacota, Tennessee and Utah.
- Counties within States are only allowed to issue a set number of licenses for on-premise consumption of alcohol. Hence, in certain states, it is possible for un-licensed restaurants to invite their customers to bring their own wine that they can buy from an off-license.
- To maintain bargaining power and faced with the threat of ever more powerful importers and suppliers (e.g. Gallo), distributors merge to create stronger networks and benefit from better cash flow.

Three-tier system criticism and changing legislation

The distribution system in the US has been increasingly under scrutiny, partly fuelled by the escalating wine popularity that poses an immense profit opportunity for all tier players. Suppliers and retailers accross the US have been attacking the system and trying to change the law, criticising it as «obsolete» and «harming» both to the consumers and the industry. From CostCo to the Specialty Wine Retailers Association, wine industry players are fighting for permission to trade between Out-of-State Wineries to In-State Retailers as well as Out-of-State Retailers to In-State Consumers.

Put in place in the 1930's, the system fails to take into account the recent explosion in wine producers and imported wines, or the distribution efficiencies of the internet and direct shipping. Moreover, within the last 20 years, the particularities of the three-tier system in conjuction with the retailers consolidation, have led into a massive consolidation of wholesalers, that resulted in an oligopoly environment, ,

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(the overall wholesalers number dropped from 5,000 nationwide in 1950 to less than 200 today).

Favorable regulations such as *franchise laws*, *credit bans*, *minimum mark-up laws*, *bans on volume discounts* and *central warehousing bans* (applied in various states) are considered to be reducing fair competition among second tier players, at the expense of retailers', smaller suppliers' interests, while at the same time significantly limiting the end-consumer's range of choices.

A few yeas ago Robert Parker predicted the «total collapse of the convoluted three-tier system». Whether or not this will be the case, many industry sources are discussing the eventual separation of the sales and logistical role of shipping wine. Due to loosening direct shipping laws as well as the current practice of suppliers (wineries and importers) taking up marketing activities, the marketing and sales role of distributors is gradually diminishing. Nontheless, distributors will continue to provide solid economic value in terms of logistical support and resources.

Trying to get around the complexities of the system some importers partner up with distribution companies. Some suppliers/importers work with more than one distributor in each State / city for various reasons, i.e. split their portfolio to distributors based on their market focus, to minimize risk, and in some cases due to state franchise law restrictions.

Exporting wineries may have one importer for the entire US, others have more, splitting the US in zones: West, East and Central.

Trade contacts in the state of New York

The three-tier system requires wine to go through a supplier/importer to a wholesaler, sometimes with the intervention of an agent, and then to retail. The size and complexity of the market is large and for any supplier/producer wishing to sell wines in the US market and the state of New York, there are a number of trade directories available that provide relevant information:

- International Beverage Network (**http://www.internationalbeveragenetwork.com**)
- Wine& Spirits Wholesalers of America (**http://www.wswa.org**)
- Best Wine Importers (**http://www.bestwineimporters.com/**)
- Vineyard and Winery Management Magazine (**http://www.vwm-online.com**)
- Wines & Vines Directory (**http://www.vwm-online.com**)
- Global Wines & Spirits (**http://www.globalwinespirits.com**)

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Large domestic and foreign suppliers/producers (multi-sourcers) tend to have vertically integrated supply chains and have their own distribution networks. Such players are E&J Gallo, Constellation Brands, Pernod Ricard and Diageo.

Smaller scale suppliers/producers (regionals) such as Torres, Concha Y Torro and Antinori, in most cases have an exclusive relationship with their importer and distributor, as they can offer them a big enough range to represent the entire country in their portfolio.

Estate wine producers are imported and distributed through second-tier, specialist companies that usually focus on a cluster of such producers that they represent.

Retail channels

Amidst the economic downturn, wine lovers may not be buying as many expensive bottles as before, yet according to industry sources they are still seeking out quality wine. Retailers, in an effort to boost sales of their pricey products and trim their inventory are responding with offers, especially in the $10-20 range. Wine media report that wine lovers today are able to get quality wines at much lower prices than 3 years ago.

The following pie charts show evolution of wine expenditure in the on- and off-trade:

Based on data by: *IWSR, US Index, June 2008 & Mintel, Wine US, October 2008*

The economic crisis has had minimum effect so far and on-premise sales have kept their share of the market despite the rise of the eating-in trend.

The off-trade

The off-trade represents 63% of the wine market's value. Within the channel, wine specialists (liquor stores) are losing share to supermarkets and supercentres/ warehouses mainly due to: i. expanded wine selections and point-of-sale guidance now offered by the latters, and ii. the consumers' effort to consolidate shopping trips in order to cut down on gas expenses.

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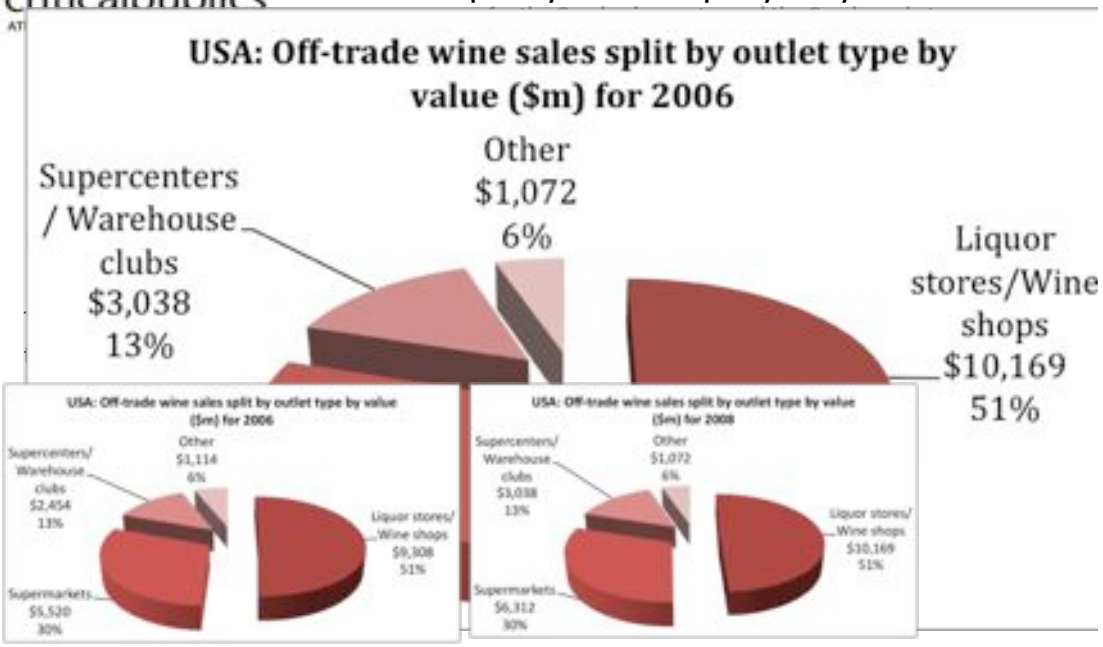

Based on data by: *IWSR, US Index, June 2008 & Mintel, Wine US, October 2008*

Split between outlet types has remained relatively stable with market share variations of less than 1%. Supercenters/warehouse clubs appear to be performing marginally stronger in 2008 when compared to 2006 than other outlet types. Developments in all main outlet types are discussed below.

Supermarkets

As the US wine market increases its value, supermarket chains step-up their efforts to get their share of the pie. With a 34% increase in wine sales in the 2003-2008 period, estimated to reach €4.9bn ($6.3bn) value, supermarkets are becoming an increasingly important channel for selling wine, for a number of reasons:

- Wine and gastronomy is a rising trend and supermarkets can capitalise on that by selling food and wine and promoting through various marketing activities (eg. Leaflet entry) the pairing of food on offer with wines on offer from their shelves
- Supermarkets have upscaled their wine departments to resemble more the look and feel of wine shops, with wooden floors and dimmed lights as well as a wide selection ranging from super-value to super-premium wines
- Supermarkets can offer discounts and promotions. Additionally they can engage in cross-departmental marketing activities, promoting wine to shoppers that are interested in other products, such as fresh meat, fish and produce (to be enjoyed with dinner) or greeting cards (offer as a gift)

US supermarkets are allowed to sell wine in 35 states. In certain states, such as New Jersey and New York, supermarkets are not licensed to sell wine, which is only sold through liquor stores.

Similarly, in such states beer is only licensed to be sold at supermarkets.

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However, as the whole system is currently in flux, there has been a recent proposition included in Gov. David Paterson's budget that would allow wine to be sold in grocery, drug and convenience stores, in the state of NY. Liquor and wine store owners across the state have united against it, as they fear that thousands of jobs would be lost and businesses would close due to the fact that liquor stores would become unable to compete with big chain grocery stores. (Similar cases are pending in two more states)

Supercenters and Warehouse clubs

USA's fastest growing channel for wine managed to over-double its wine sales value in the 2003-08 period, reaching an estimated value for 2008 of €2.3bn ($3bn).

However, it should be noted that wine products in supercenters are not nearly as discounted as their other products, due to state laws preventing them from buying direct from suppliers.

Industry giant Wal-Mart has put the focus on building its wine category and achieved to drive the channel forward by:

- Expanding its sale points for alcohol to include not only to its supercenters but also its general merchandise stores
- Up-keeping its value proposition, Walmart offers most wine under $10 a bottle. To this end the company launched its own-brand "Oak leaf" which sells for less than $3 a bottle.

Costco's wine sales reached $805m in 2006, of which $390m was within the «fine wines» segment.

Liquor stores and Wine shops

This is USA's biggest off-trade channel for wine with estimated sales of €7.92bn ($10.2bn) for 2008. Although sales have grown by 28% in the 2003-08 period, the specialist channel is being outpaced by Supermarkets and Supercenters as it is losing its competitive advantage. Specialist stores offer what is usually a better wine selection and more knowledgeable staff, but the larger retailers have been improving their wine offerings and now provide wine guides for customers who need a little help choosing the right bottle. This, combined with consumers' desire to reduce and consolidate their shopping trips due to the high fuel prices, is putting specialists under increasing pressure.

It is important to note that, unlike in the other key markets of Germany and the UK, specialist off-traders in the US do not form –in the vast majority of cases- retail chains, but exist as single-location operations. In addition, specialist wine shops and liquor stores in particular play important role in establishing wines in the minds of consumers. This is key for wine suppliers (at country or even producer level) that do not have the volume to trade in the supermarket channel. Such cases in the New

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York area are Morrell, Zachys, Sherry-Lehmann and Astor Grab. In New Jersey, the Wine Library retails wine, beer and spirits both through its store and on-line, shipping to 34 states.

Specialist super store concept

A new super store concept named Global Wine & Spirits, currently under development, is to be launched soon by American Liquor Alliance's and is expected to revolutionize the wine and spirits industry super store concept. These new 35,000 sq.ft. stores will feature high end retail design, combining interactive customer oriented displays with high end, cutting edge technology. The stores will offer – among other services- an upper end wine section, appropriately named RSVP (Rare Select Vintage Products), as well as a Guest Services Center that will enable customers to pair their meal, special event, or emotion with over 120,000 products within the store.

Major wine retailers in New York	
	Morrell (**www.morrellwine.com**) Focusing on bringing wines that show value-for-money at any price point and highly-rated wines. The company invests in discovering new wines and on customer education.
	Zachys (**www.zachys.com**) The company aims at offering one of the most complete selections of fine wines & spirits in America and excellent customer service. Zachys ships across-state where permitted.
	Sherry Lehmann (**www.sherry-lehmann.com**) The company has a strong focus on providing excellent service, the best possible selection and in bringing "delicious, inexpensive gems to grace your table every day". Sherry Lehmann

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	has over 70 staff, ships intra-state and its catalogues (6 p.a.) reaches hundreds of thousands of clients in the US.
Astor 	Astor (**www.astorwines.com**) Astor claims to choose "the road less travelled" and to look for wines that are best, not necessarily most popular. The company offers a complete wine experience with classes, events etc. This April 6th, Astor runs a "Taste of Greece: hands-on cooking and wine pairing" with Carl Raymond.
Major national retailers (not selling in New York at present)	
WAL★MART 	Wal-Mart (**http://walmartstores.com**) The world's largest retailer has made it its mission to "save people money so they can live better". The company has over 7,800 Wal-Mart stores and Sam's Club locations, in 16 markets across the globe. In the US, the company operates 891 Discount stores (av. 107k sq.ft), 2,612 Supercenters (av. 187k sq.ft.), 150 Neighborhood markets (av. 42k sq.ft.) and small, fresh-produce Marketside stores.
 	Target (**www.target.com**) Target focuses on good design and aims at delivering "outstanding value, continuous innovation and an exceptional guest experience" for customers that want trendy merchandise at affordable prices. The company operates 1,685 stores in 47 states, including 218 SuperTarget locations.
COSTCO.COM	Costco (**www.costco.com**) Operates an international chain of membership warehouses (406 in the US), that carry quality, brand name

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	merchandise at substantially lower prices than are typically found at conventional wholesale or retail sources. The warehouses are designed to help small-to-medium-sized businesses reduce costs in purchasing for resale and for everyday business use. Individuals may also purchase for their personal needs.
BJ's.com	BJ's (**www.bjs.com**) BJ's is dedicated to providing Members with top-quality brand-name merchandise at prices significantly lower than supermarkets, supercenters, department stores, drug stores and specialty stores.
Sam's Club	Sam's Club (**www.samsclub.com**) Another major wholesaler, focusing on driving prices down, with stores around 120k sq.ft. Sam's club is owned by Wal-Mart.
Albertsons	Albertsons (**https://shop.albertsons.com**) Part of the Supervalue group (third-largest food retailing company in the US with over 2,500 locations), Albertson's is a premier grocery chain in the Intermountain, Northwest, Southern California, Las Vegas regions.

The internet

Wine in the US is expected to take big leaps online in the near future. The internet is considered the ideal solution for winemakers who suffer due to the restrictions of the three-tier system and for consumers who are keen to experiment with the vast array of wine products available outside residence state.

Internet is still a largely undeveloped market, due to the regulatory system complexities (laws differ from state to state). According to Internet research firm comScore Media Metrix, less than one half of 1 percent of national wine retail sales takes place online.

The gradual loosening of restrictions on direct-to-consumer shipments of wine, has facilitated on-line sales, which are already claiming a larger share of the pie. However, suppliers still cannot sell wine on a national basis. According to industry

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sources, this has led many suppliers to ship wine illegally on-line to out-of-state clients (i.e. not conforming to arrival state regulations).

In an effort to tap this immense opportunity, the internet's retail giant Amazon.com is about to launch its partnership with San Francisco Internet retailer Wine.com. Amazon will simply direct traffic to Wine.com's Web site and the joint venture is expected to have a significant impact in the market, given Amazon's 18 million active user accounts, particularly in the premium segments.

Wine.com's uniqueness is based on its sophisticated distribution system, crafted to comply its product offerings to the legal requirements of the state to which they will be shipped. (The company has acquired licenses in all the states that don't permit wine shipments and is maintaining retail licensed distribution points within those states. In addition to that, the company is buying its products from licensed wholesalers within states such as Washington).

Last year, Wine.com shipped wine to more than 100,000 customers, posting $32 million in sales - up more than 40 percent from the previous year. More than 2 million people visited Wine.com in 2004.

Major wine e-retailers in the US	
wine.com	Wines.com Founded in 1998, Wines.com is the #1 online wine store by revenue since 1998; the company wants to offer large selection at low prices, wine information and convenient deliveries.
DrinkUpNY DrinkUpForLess	DrinkupNY.com, Drinkupforless.com Based on a physical store located in Brooklyn NY, the retailer offers fine wine to match both everyday and exceptional occasions, at excellent prices. DrinkUpNY offers free ground-shipping options for US customers and can also ship worldwide. DrinkUpForLess is a sister site, focusing specifically on wines retailing at under $20 and bringing in "new, unexpected, exciting wines from around the world".
amazon.com	Amazon.com The e-commerce giant is expected to enter the wine business in the immediate future and become the storefront for a great number of producers and wine companies. At the moment, Amazon provides houseware products related to wine and soon is going to provide links to Wine.com for actual wine purchases.

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Price brackets for price-based wine categories in the off-trade

The following table presents the main classifications for bottled wine based on the product's retail price and the corresponding price brackets per bottle [15]:

Category	Price bracket
Super value wines (the most inexpensive ones)	<4.99 US$
Basic or sup-premium wines (the next level up)	5-8.99 US$
Premium wines (the next level up)	9-14.99 US$
Super premium wines (the next level up)	15-24.99 US$
Ultra premium or deluxe wines (the next level up)	25-49.99 US$
Icon or Luxury wines (most expensive, yet nor rare collectable wines)	>50 US$

The on-trade

The on-trade represents 37% of the total wine market in the US. Wine sales have seen an overal growth in the 2003-08 period of 42.9%. The effect of the economic depression and the recent trend of home entertainment as a direct result, have managed to restrain wine sales at on-premise channels and 2008 is forecasted to show growth of 4.5%. Still, considering the circumnstances, this can be regarded as a positive result. The value of the on-trade is expected to reach €9.25bn ($11.9bn).

Restaurants in specific, perhaps more than any other channel, have the capacity to cause a ripple effect and bring a producer (winery or country) into the spotlight of attention. With prestige, top-end restaurants, a place in the wine list will generate positive publicity. With second-tier restaurants, an offer by-the-glass will facilitate the public's familirisation with a specific wine and can drive sales both at on- and off-premise selling points.

A list of the top trend-setting restaurants and bars in the urban «creative class» centres of the US is provided in Appendix C: Wine & Gastronomy Catalysts. A brief introduction is provided in the following section on Wine & Gastronomy Catalysts.

[15] Price brackets may fluctuate according to industry source

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Catalysts, trends, consumer perceptions and behavior analysis

The following section identifies catalysts and emerging trends in the wine domain, consumer perceptions regarding wine, as well as behavioral patterns influencing purchases in the US wine market.

N.B.: Due to the fact that global sustaining and emerging trends in the wine domain are exhaustively presented and analysed within Deliverable 1.1, the present analysis briefly highlights those trends among them that are predominant for US consumers.

Wine & gastronomy catalysts

Within the scope of the present study, the opinion-leading entities in the wider wine, gastronomy and entertainment domains, which shape consumers' perceptions and behavior, were identified and profiled.

The selected catalysts are either related to the wine industry or draw wine enthusiasts or appeal to an audience that enjoys wine in general, and were selected according to their degree of influence in the US market. Thus, they include:

- Influential lifestyle, variety, well-being, gastronomy and wine media as well as those regarded as catalysts irrespective of subject – however they feature wine sections or ad hoc articles; these include print, online, social and audiovisual media
- Influential professionals such as chefs, wine experts, editors and other gastronomy celebrities have been included
- Venues such as trend-setting restaurants and bars have also been researched
- High profile industry events targeted at trade players or end-consumers, such as awards, fairs and exhibitions.

Although there cannot be a definitive rule regarding who is considered to be a catalyst, certain patterns and common features emerge from research. The significance of the «creative class» becomes apparent in view of the profile and locus of the identified catalysts. The creative class, a term introduced by social scientist Dr. Richard Florida, describes a group of people, that are considered to be a key driving force for economic development of post-industrial cities; it consists of scientists, engineers, managers, innovators and people in research and development, as well as artists, writers and musicians, thinkers, decision-makers, who influence cultural phenomena and impact business. Their impact, not only on the evolution of the consequent «creative centres» but also on the further concentration of individuals that excel in their domains, is evident.

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In the context of the present analysis it is apparent that wine and gastronomy catalysts identified can be traced to a large extent in the so-called «creative centres». Appendix B provides the necessary background analysis for the identification and profiling of urban creative centres in the 3 reference country-markets.

Wine and gastronomy catalysts are presented and profiled in Appendix C in an extensive –yet not exhaustive- list. The methodology for the initial selection and finalisation of catalysts list is also presented in the Appendix. It should be noted that factors such as recognition, i.e. awards or Michelin stars, popularity, circulation and readership were primary.

Trends and consumer perceptions on wine

Even though global sustaining and emerging trends in the wine domain are exhaustively presented and analysed within Deliverable 1.1, the section hereafter aims to briefly highlight those trends among them that will mostly affect the US wine market in the near future.

Going green, going organic

The Green trend is growing large in the US with 36% of consumers claiming they almost always or regularly buy green products. The wine industry is adapting to this (global) trend by:

- Using environmentally-friendly packaging, such as tetra pak, PET bottles, 3lt boxes, in order to reduce the carbon footprint related to transportation
- Responding to the growing interest for organic, biodynamic and sustainable wines. Indications exist that the organic wine section in liquor stores is growing by 20% p.a.
- Educating domestic winemakers in green and sustainable wine-growing practices. The Wine Institute located in California offers related educational programs that can improve winemaker's business and also attract eco-conscious consumers

On the other side, wine industry experts comment that consumers do more talking than acting, when it comes down to being green. Eco-chic may be seen as the way to be today, but the majority of consumers are neither informed/ educated with regards to the green issues, nor willing to change habits and compromise their convenience zone to protect the environment. This poses a big challenge, especially

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with regards to wine packaging, as alternative, eco-friendly solutions may ultimately drive away consumers[16].

Premiumisation and indulgence

This trend is based on the premise that premium must be indulgent, but premium must not necessarily be expensive. Focusing on the role of wine as a provider of indulgence, premium wine is perceived as such not on the basis of its price but on the basis that it awakes emotions and provides indulgence experiences. Thus, premium has become mass and everyone can enjoy the feeling regardless of price.

Home-consumption supports premiumisation trend

While home-consumption for wine is certainly on the rise, people always look for luxury they can afford. To this end, as more homeowners are investing and choosing wine for their special occasions, the wine storage industry is growing as well[17].

Climate controlled wine lockers, wine refrigerators (which are becoming part of standard appliance packages) and wine cellars in basements are growing in acceptance and popularity, which reflects on the market's turn towards wine and its acceptance as an indulgence product that's a part of the consumer's lives.

An everyday drink

Growth in the US wine market has largely been a result of the industry's conscious effort to reposition wine from an unfamiliar, difficult to understand and possibly pretentious drink that was reserved for celebrations and special occasions to a friendly, easy-going, uncomplicated to understand, fun and enjoyable everyday drink.

Wine has been made accessible with an influx of good quality, low price wines to the market, which also helped to position wine as an «affordable luxury». This is especially relevant to America today in the face of major economic depression. The widening of distribution and shaping up of retailing and marketing used has made the market a global leader.

According to Mintel's Wine US, October 2008 report, just more than two thirds (35%) of consumers drink still light wine, while only half of them (17%) drink imported still light wines, most likely due to the domestic wines' lower price point.

[16] http://www.bevindustry.com/CDA/Articles/Feature_Articles/BNP_GUID_9-5- 2006_A_10000000000000405919
[17] http://www.nytimes.com/2008/10/05/realestate/05post.html?_r=1&ref=dining&oref=slogin

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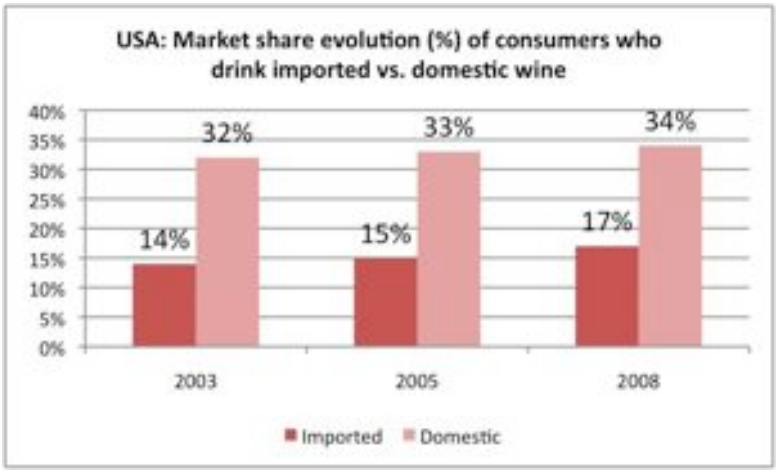
The same report finds that the total number of wine drinkers grew by 6 million during 2003-8; it argues that this increase in wine drinkers group has largely come «from growth in population rather than increase in the incidence of drinking wine», hence leaving a window of opportunity for future market growth.



Source: Based on data from *Mintel, Wine Us, October 2008*

It should be noted that the same report shows that nine out of 10 wine drinkers surveyed agreed that «good wine doesn't have to expensive», further supporting the accessibility element lately associated with wine.

Harris Poll recent survey[18] reported that almost six in ten Americans (58%) are wine buyers while 39% say they never buy a bottle of wine. Moreover, those who are «wine drinkers» (defined as U.S. adults aged 21 and over who buy or drink wine) are buying wine slightly more frequently than they were five years ago. In 2004, almost three quarters of wine drinkers (73%) bought a bottle of wine once a month or less often, while 3% bought one twice a week or more often. There has been a small shift as two-thirds of wine drinkers (67%) are buying a bottle once a month or less often while 8% are buying one twice a week or more often.

How often buy wine among wine drinkers	Dec2004 %	Dec2008 %
Once a month or less often	73	67
Two or three times a month	16	16
Once a week	8	9
Twice a week or more often	3	8

Source: *The Harris Poll*

[18] conducted in December 2008

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As far as drinking wine is concerned, just over half of wine drinkers (54%) say they drink wine once a month or less often while 18% drink two or three times a month, 7% drink once a week and one in five (20%) drink twice a week or more often.

Wine drinkers' eagerness to experiment

Harris poll that more American wine drinkers are consuming wines from Australia, Chile, Argentina and South Africa and less people are drinking French and Italian wines.

Which countries' wines bought or consumed	Dec2008 %
U.S.	90
Italy	37
Australia	37
France	34
Germany	22
Spain	22
Chile	20
Argentina	18
New Zealand	12
South Africa	10
Portugal	8
Greece	4
Israel	4
Brazil	3
Bolivia	2
Turkey	1
Poland	1
Canada	1

Source: *The Harris Poll, 2008*

What is even more interesting is that many people who aren't buying wines from other countries right now are willing to consider wines from these countries. For example, while just 37% of American wine drinkers are buying Italian wines, 61% would consider buying them. This is even better news for lesser known wine producing countries, as more people would consider trying their wines. Specifically in regards to Greece, even though only 4% of the people in the survey are currently buying or drinking Greek wines, 28% would consider trying them.

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Countries whose wines would consider buying	Dec2008 %
U.S.	83
Italy	61
France	61
Australia	49
Spain	47
Germany	42
Argentina	35
Chile	34
New Zealand	33
Portugal	32
Greece	28
Brazil	27
South Africa	24
Israel	24
Bolivia	20
Poland	19
Turkey	18
Canada	1
Any country	5

Source: *The Harris Poll, 2008*

Occasions for enjoying wine

Three quarters of the population believe that wine is ideal for when socialising with friends. Together with holidays and special occasions (72%) and dinner time (70%), these are the three most important occasions for enjoying wine in the US. Drinking wine at bars is only seen as a fitting occasion by 23% of the population. Enjoying wine at a restaurant is a suitable occasion for 65% of people.

These observations seem to be rather consistent across age groups, with the exception of the 21-24 age group that prefers to drink wine when socialising and not so much at dinners, restaurants and other occasions.

Wine and food

The fact that wine can be better enjoyed with food is becoming increasingly accepted in the US market. The view that wine is best enjoyed with food represents 45% of males (who are predominantly beer drinkers) and just 35% of females, who enjoy

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wine on its own as well, more than men do. Furthermore, the view that the right style of wine must be matched with the right food to be enjoyed properly also reflects to about 40% of the population, with a heavier weighting on the male segment (46%).

The notion that wine and food should be enjoyed together is being further promoted by supermarkets and grocery retailers who make cross-department promotions and use marketing techniques to increase impulse/un-planned purchases in-store.

Source: *Ruffino & Barilla: Joint POS display*

Demographics that have not yet developed a strong wine culture, such as Blacks and Hispanics are more likely to hold such views about wine and restrict consumption to specific occasions, such as a dinner of celebration.

Efforts are being made to capitalise on the link between food and wine while at the same time avoid the danger of being restricted by these kind of «taboos» and encourage wine consumption beyond traditional rules and old-fashioned customs.

Food trends: Slow Food Movement and healthy eating

Despite its strong fast-food culture, the US is now taking a closer look at the Slow Food movement. The Slow Food Nation, the largest celebration of sustainable, local and artisanal food ever attempted in the US is to take place in San Francisco, right outside the City Hall. The events intend is to drive the shift in how Americans

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perceive and prioritise food and contribute to the change of the industrialised food system.

In line with the Slow Food movement underlying principles the following trends are now re-shaping food consumption in the US:

- Creating a healthy household and putting a lot more effort in shopping for food and eating healthier
- Buying into the natural benefits of "superfoods"
- Managing weight and weight loss through smaller portions, specific food restrictions and light/low-fat and super-satiating foods
- Eating condition-specific foods and foods that cater for sensitivities and allergies
- Living proactive, preventative lifestyles
- Preferring simpler, greener and cleaner foods, with few ingredients and preferably fresh
- Choosing smart treats and healthy snacks
- Choosing foods that stimulate and energise body and mind
- Choosing convenience, as "good" foods find new, convenient channels for reaching consumers with a hectic lifestyle

The health benefits of wine

This is a common perception in the US market and a main driver for consumers who shift from other kinds of alcohol to wine. There is very high awareness of the benefits of drinking wine and nearly 90% of consumers know that moderate wine consumption is good for overall health.

As the general public faces increased rates of obesity, diabetes and heart disease, the steady stream of studies concerning the positive effects of wine on health has managed to reach a large audience. Health associations are stronger for red (83%) than they are for white (41%) and play a more important role with Baby boomers, with which the issue is more prominent.

Wine has been linked with playing a positive role with health issues such as maintaining heart health, inhibiting certain types of cancer, preventing and treating neurological diseases such as Alzheimer's disease and finally acting as an anti-ageing agent.

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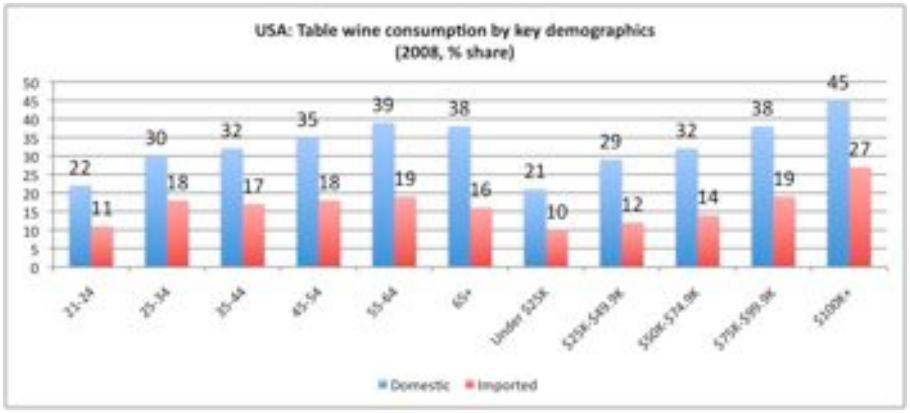
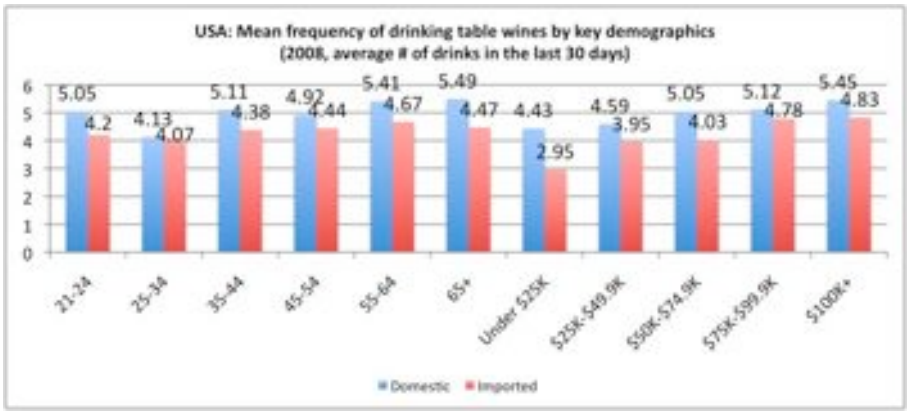
Consumer groups and purchase behavior

Demographics vs wine consumption

Wine consumption vs age and income

Wine consumption, as well as imported wine consumption, increases significantly with age and income, both in terms of usage and frequency.





Source: Based on data by *Mintel, Wine US, October 2008.*

Imported wine penetration is stable at around 18% for those aged older than 25, while it is significantly augmented among the high-end, affluent population (annual income above $100k).

In terms of frequency, imported wine consumption increases for those aged above 35 years old (probably driven by positive wine and health associations) and those with annual income above $75k.

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In addition to Mintel's findings that wine penetration reaches just over a third of the population, the Wine Market Council [19] identifies only 15.7% of consumers as core wine drinkers. Furthermore, according to Pointer Media Network[20] claims that only 6.8% of total wine drinkers, equal to 7.5 million, drive 80% of the category's volume in the US. The number is even smaller for imported premium and imported wine, where only 4.7% or 5.2 million consumers drive 80% of the volume.

Women drive wine consumption

Increased consumption by women has been a key driver for wine market growth in the US. Women consumers tend to drink more than men (38% compared to 32%); In addition to this, women are the primary grocery shopper of the US household and supermarkets account for 45% of wine sales by volume.

Women shoppers are generally looking for value wines, as wine is perceived as something to be enjoyed, in contrast to men who shop for more expensive wines, as they perceive wine as a status item.

The female demographic in the US opts mostly for white and rosé fruitier styles and is being targeted directly – and in some cases aggressively, with wine brands such as «Little Black Dress» and «Mad Housewife». The latter takes a bold approach, reading on the back label: «It is your time. Time to enjoy a moment for yourself... The dishes can wait.»

Key generations

Baby boomers

This is the post-war generation born between 1946-1964, aged today between 44-62. Baby boomers have more disposable income, more leisure time and a greater interest in wine's health benefits, while their number is expected to increase nearly 40% during the period 2003-2013. Especially the leading edge baby boomers between 55-62 hold the highest wine consumption rate at 41% among all age groups.

Generation Y

Born between 1977 – 1994 and aged today between 15-32, this demographic perhaps poses the greatest opportunity in the US market. Without their senior's preconceptions about wine, the «millennials» are open to discovering new types of wine, new packaging, new names and are more open to a relaxed, non-pretentious wine culture. Millenials can be approached not only by traditional media such as TV and the press but also by the internet and web 2.0.

[19] http://www.winemarketcouncil.com/research_slideview.asp?position=4)
[20] http://www.winespiritsdaily.com/2009/04/75-million-constitute-core-wine.html

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Generations Y, or else Millenials, consume increasingly more wine to enhance food and connect with friends and family. With regards to sparkling wines and champagne, focus groups reveal that millenials would only go for these products on special occasions and celebrations. In contrast, still wines are broadly perceived as an every day and dinner drink[21].

Today millenials spend 26% of their alcohol budget on wine, a 6% increase in a decade. This is expected to rise further and most probably at a faster pace as wine culture becomes more mainstream; and this along with the fact that their number is expected to grow by 12 million by 2012, casts them an even more promising segment.

25-34 year olds

This group, consisting of the oldest segment from Generation Y and the youngest from Generation X is also considered to present a promising, value-creating opportunity. They are significantly more likely than other age groups to believe that «more expensive wine often tastes better» (44% vs. 31% on total population); A perception supported by their buying behavior, as they tend to spend more on wine than any other age group regardless of purpose of consumption (see also following section on purchase behavior). Moreover, they tend to buy wine from specialist outlets (such as liquor stores, gourmet food shops and wineries) more often than any other age group, indicating interest and higher involvement in the wine selection process.

Purchase behaviour

This section elaborates on the main factors with regards to the US market that affect consumer buying behaviour, their mean spending by purpose of occasion, as well as their choice of retail channels.

Key decision-driving factors

The three top considerations for US consumers when selecting wine are, in order of precedence, type/variety, brand and price. In more detail:

- Sticking to the type of wine they are familiar with is more common among the more senior age groups with 68% of the 45-54 band agreeing. Younger consumers still show a hesitation of trying different types of wine but to a lesser extend, with 60% of the 21-24 band agreeing

- Younger segments are far more likely to be loyal to brands, with 55% and 48% of 21-24 and 25-34 bands respectively preferring to stick to the brand they know. The corresponding percentage for the 45-54 band is 38%

[21] http://www.winebusiness.com/news/DailyNewsArticle.cfm?dataid=60137

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- 36% of consumers decide mainly on price, with the 21-24 consumers being the most price sensitive at 48%
- Rather surprisingly, the look and description of the label plays a very small role in deciding what to buy for the younger age group 21-24. About a quarter of the other age groups use labels both in terms of appearance and in terms of content as a way of deciding what to buy
- Loyalty to regions/ countries of origin is highest at the 25-34 age group at about 25%. The total population averages lower at 20%
- Recommendations and ratings are also more important to the 25-34 age group at 28%. This factor carries very low weighting for the younger 21-24 and older 55+ segments
- The same holds true for selecting wine with the help of retailer staff, which is important to approximately 25% of the 25-44 age groups but less than 20% for older ages

The following table identifies the importance/popularity of decision driving factors for the American consumer:

Which of the following do you do when buying wine?	(%)
Stick to the type of wine I know or like (eg. Cabernet, Merlot, Chardonnay, Zinfandel)	68
Stick to brands I know	42
Decide mainly by price	36
Decide after in-store sampling	26
Decide after browsing and weighting the look of the label and the description on the label	24
Stick to wine from a particular country or region (eg. Napa valley, France, Chianti)	21
Decide after reading a written recommendation/ wine rating	20
Decide after consulting with retailer or staff	19
Other	6
None of the above	3

Source: *Mintel, Wine US, October 2008*

An earlier study conducted by Vinitrac[22] in the US among regular wine drinkers in 2007 revealed the relative weightings of choice queues in the consumer's selection process:

[22] Vinitrac® USA December 2007; Base = US regular wine drinkers, n = 2,015; Vinitrac®

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% "important or very important"	USA
Grape variety	73%
Recommendation by friend or family	71%
A brand I am aware of	69%
Recommendations by shop staff	52
Promotional offer	51
Country of origin	47
Region of origin	47
Alcohol content	33
Appeal of the bottle or label design	33
Medal or award	21

Source: *Vinitrac*

Grape variety, the importance of friends and family recommendations, as well as the increased role of the brand stand out.

Spending by occasion

Prices that consumers are willing to pay for wine vary vastly according to the occasion:

- Everyday wine appears to hold an average value of $13.50 a bottle, with 51% of the consumers choosing a bottle below the $11 price point. The premium price tier ($12-$19) was the choice for 21% of consumers
- When purchasing wine to serve guests or to offer as a gift, the weight shifts heavily to the premium and ultra-premium price tiers, with 45% and 50% share respectively
- Buying wine for a special occasion has the highest mean price ($24.30) and ultra-premium price tiers enjoy a 49% share
- The share of consumers which choose not to buy wine is largest at restaurants (bottle purchase). People who choose not to buy wine have also a 47% share on bar and 67% on club occasions, where wine is sold mainly by the glass
- In general males and the 25-34 age group spends more than all other demographics on wine: Men spend $3 to $4.6 more than women on wine, depending on the consumption occasion; similarly the 25-34 age group spends from $5.7 to $15.3 more than the average on wine, depending on consumption occasion

The following table summarizes average spending for consumption by occasion in the US:

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Occasion	Average spending ($)
For a special occasion (bottle)	24.3
Serving to guests (bottle)	15.0
At a restaurant (bottle)	14.8
As a gift (bottle)	14.3
General consumption at home (bottle)	13.5

Source: *Mintel, Wine US, October 2008*

Choosing retail channels

The following table presents preference of retail channels for the average American consumer:

Where do you purchase wine	%
Grocery store/Supermarket	59
Small, local liquor store	54
Specialty liquor store chain	36
Winery	28
Club store (eg. Costco, BJ's wholesale, Sam's club)	23
Wal-Mart	17
Gourmet food shop	13
Mass merchandise store (eg. Target, K-mart)	8
Online or direct to consumer	6
Convenience store/ gas station	5
Other	5

Source: *Mintel, Wine US, October 2008*

Supermarket is the retail channel of preference for the majority of consumers, especially for the more senior age groups (+55). Speciality liquor stores, wineries and gourmet food shops are points of purchase especially appealing to the 25-34 age group.

Choosing features, attributes and benefits

Based on extensive research conducted in the US, it is possible to determine the key characteristics of wine that are important to consumers when choosing what to buy:

- Country of origin is an important consideration. As discussed in previous sections, wine from Italy dominates the more premium price tiers, wine from Australia however has taken the lead in lower price segments, with brands such as Yellow Tail. With Baby-boomers and Generation X, traditional wine producing countries, namely Italy and France are seeing

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increased popularity. With Generation Y however, Spanish wines and wines of the New World play a more important role, as younger people tend to be more adventurous with their wine choices.

- In terms of varietals, Zinfandel and Merlot are most popular, and this holds especially true among generation Y consumers. Chardonnay and Cabernet Sauvignon are also popular across all age groups. Other varietals like Pinot Noir and Sauvignon blanc are much smaller, especially with baby-boomers, and are more accepted with the younger age groups that are willing to try new things.

- In choosing point of purchase, supermarkets and grocery stores are commonly accepted across demographics as the place to shop for wine today, catering for 60% of wine drinkers. Buying wine at a specialty liquor store, winery or at a gourmet food shop are popular choices mainly in the 25-34 age group, which may be drinking less quantity but is willing to spend and experiment more.

- In deciding whether to go for more expensive or for economy wines, consumers are in general satisfied with highly-rated, value-priced wines at a cost of under $9 per bottle. Still, although 90% of wine drinkers agree that "good wine doesn't have to be expensive", it must be noted that –as already pointed out in the demographics section- approximately 40% of younger consumers (aged 21-34) believe that "more expensive wine often tastes better".

- Fun, easy-going names are constantly gaining in popularity, especially among younger consumers who can often be intimidated by "Old School" names they cannot understand, such as "Bordeaux" and "Beaujolais". Names such as "Red Bicyclette" which make the wine a less-pretentious product to the eyes of consumers are expected to be seen more on shelves in the future.

- Critter names are a special category within the "fun, easy-going label" approach. The best example here is perhaps Yellow Tail, a critter brand that has grown to fame: with substantial marketing efforts and widespread distribution, sales volume for Yellow Tail increased by 74% in the 2003-2005 period, boosting other critter labels such as Little Penguin, Monkey Bay and Funky Llama. Australian wines are investing in critter brands and Chile's most popular brand "Concha Y Torro" also belongs to this category.

- With regards to packaging, although glass bottling is the prevailing method, smaller niche alternatives have been gaining in popularity. More specifically, wineboxes, which are more economical and Tetra Paks, which are environment-friendly are gaining their -niche- share of their market, especially among young consumers.

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United Kingdom

The UK is one of the world's most important markets for wine. Representing approximately 11% of the total European wine market by value[23], coming 4th in rank behind Italy (22% share), France (19%) and Germany (13%). The UK market is critical not only due to its size but also for a number of equally important reasons:

- The UK is a major wine consumer, the second largest consumer of imported wine and the fifth largest SLW consumer in the world[24], yet still has near-zero wine production of its own. This unique combination constitutes UK as a highly competitive market for imported wine, where the relative values of each country's wine offering can be compared and contrasted with minimum bias

- The UK is the second most significant country-market in the world in terms of trend-setting and influencing with regards to wine, featuring 14 out of the top 50 global public rhetoric and knowledge sources for wine (identified in Wine Sector - Global Public Rhetoric & Knowledge Sources study).[25]

The UK wine market is definitely a mature market; yet, lately wine drinking has expanded even more in popularity due to a number of reasons, analysed later on in the study. As a result, more consumers are attracted to wine while there has been an increase in per capita wine consumption as well.

However, the limited growth potential in terms of volume dictates that opportunity for further expansion would rely on the value of the market. Given the existing discounting phenomenon (mostly due to consumers' relative ignorance on what constitutes quality wine) and the current economic downturn, this would be a challenging domain for wine marketers. However, the growing consumers' interest in quality and ethical / «green» products could provide grounds for differentiation and business profitability.

All aspects of the UK market have been analysed and are presented in the sections that follow.

[23] Datamonitor, Wine in the United Kingdom industry profile, November 2007
[24] IWSR Global wine Handbook 2007
[25] Part of Deliverable 1.1, submitted within the framework of the project

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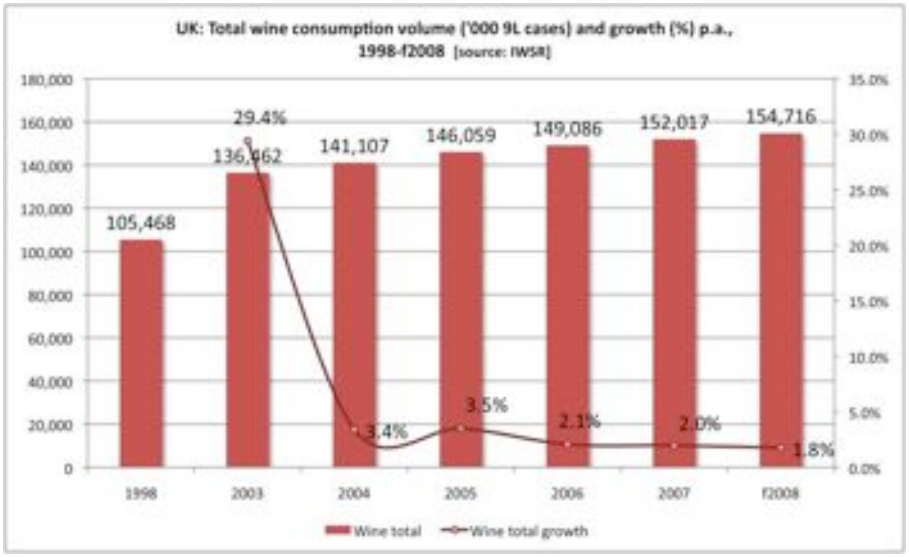
Market profile

Market size

The UK total wine market[26] reached a total size in terms of volume of 152,017 '0009L cases in 2007. This is predicted to rise a further 1.8% in 2008, up to 154,716 '0009L cases[27], as shown in the following graph:



Source: Based on data provided by *IWSR, UK Index, June 2008*

There has been a steady growth in the past decade in consumption volume. In terms of growth, 1998-2003 was a steep incline at 29.4%. From 2003 onwards, annual growth rates have been slowing down, thus marking a large volume-driven market that is reaching maturity.

In terms of market value, the UK reached €12.1bn (£10.6bn) in 2006[28], going up 3.1% on the previous year and steady on its compound annual growth rate of 3.1% from 2002-06. This indicates that, as the market reaches its maturity and wine consumption value rises faster than volume, the UK market becomes increasingly suitable for more up-market, expensive wines.

In face of today's severe economic crisis, it is hard to forecast how markets will fluctuate. As up to mid-2008, the UK wine market was proving strong in keeping its performance stable; this held especially true with regards to premium, more expensive wines and vintages with prices going up by up to 20%[29], confirming

[26] The wine market includes consumption across the (i) Still Light Wines, (ii) Sparkling Wine (iii) Fortified wine, (iv) Light Aperitifs and (v) Other wine categories
[27] IWSR, Wine retailing UK, June 2007
[28] Datamonitor, Wine in the United Kingdom industry profile, November 2007
[29] **http://www.decanter.com/news/268426.html**

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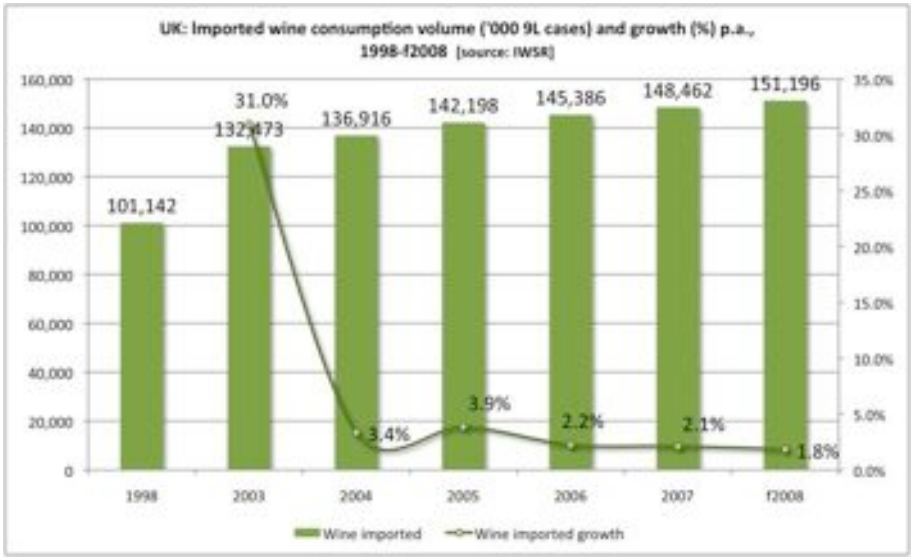
previous conclusions. Future forecasts issued at that time or earlier indicated a CAGR of 2.9% for the period 2006-2011, with the UK reaching a market value of €13.9bn (£12.2bn)[30]. More recent research suggests that the effects of the crisis are now felt stronger: over Christmas, fine wine appeared to experience a drop in prices, notably with Bordeaux wines seeing a 40% drop[31]; In addition, a third of consumers is believed to be buying cheaper or buying less wines as a result of the decrease in discretionary income and concerns have been raised that the crisis may be forcing lower-end wine consumers entirely out of wine buying[32].

Imported wine

For the UK market, imported wine consumption[33] volume is largely synonymous with the total wine consumption volume, since it represents a share of 97.2%:



Source: Based on data provided by *IWSR, UK Index, June 2008*

Imported consumption volume growth trends follow an identical path to that of total wine consumption.

[30] Datamonitor, Wine in the United Kingdom industry profile, November 2007
[31] http://www.just-drinks.com/article.aspx?id=95791&d=1
[32] http://www.talkingretail.com/news/industry-news/12324-recession-is-forcing-more-consumers-out-of-the-wine-market.html
[33] Imported wine consumption across all wine categories, as defined in the Market Size section earlier

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Still Light Wine

Still Light Wines represent 89.5% of all wine consumption and 91.5% of imported wine consumption in the UK (2007). Consumption volume and growth follow similar trends to the total wine category, although annual growth shows greater fluctuations ranging from 5.9% to 0.6% as shown in the following graph:

Source: Based on data provided by *IWSR, UK Index, June 2008*

In terms of value, the SLW category has seen contrinuous increases from 2002 to 2005 and is forecasted further growth for 2006 and 2007:

Year	Total still wine sales (£m)
2002	8,027
2003	8,386
2004	8,631
2005	8,894
2006	9,348
2007	9,633

Source: *Mintel, Wine Retailing, UK, June 2007*

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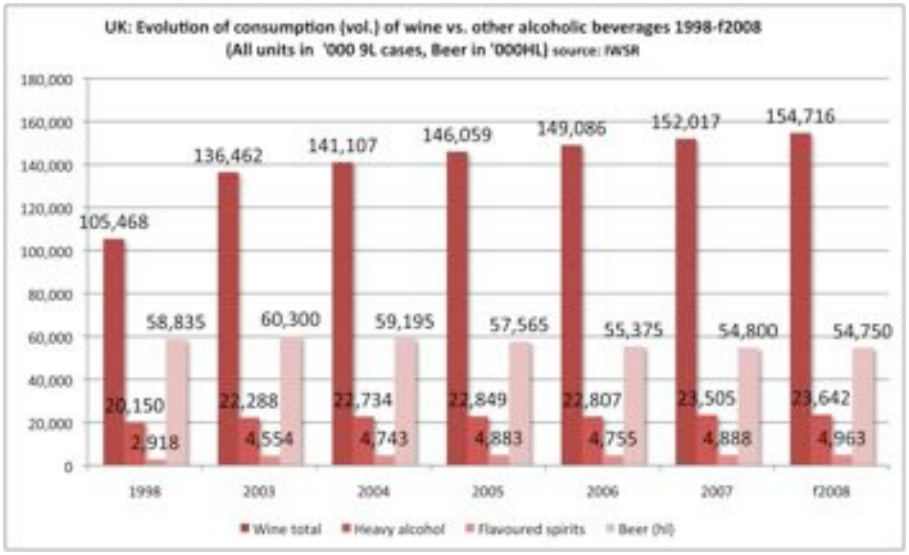
Wine consumption evolution vs. Consumption of other alcoholic beverages

The following chart shows evolution of consumption volume for key alchoholic beverages in the UK[34]:



Source: Based on data provided by *IWSR, UK Index, June 2008*

Beer is the only alcoholic category in decline, predicted a 7% drop in 2008 from 1998 levels. This can be explained by the effect of the smoking ban in the on-trade and the advent of the modern wine culture that sees wine as a drink to be enjoyed at most occasions (and generally more associated with attractive user/experience imagery and less related to binge drinking). To this effect, wine is forecasted to achieve near 50% higher volumes in 2008 than a decade before. Heavy alcohol and flavoured spirits are also on an upwards trend, although trading significantly smaller volumes.

[34] Wine includes all wine (domestic and imported); Heavy alcohol includes whisky, white spirits, rum and brandy; Flavoured spirits include liqeurs, bitters, spirit aperitifs, aniseed and fruit aux de vie.

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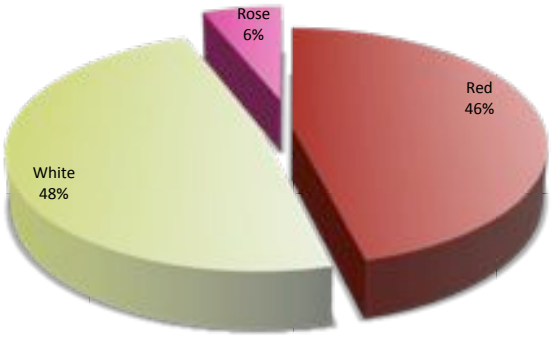
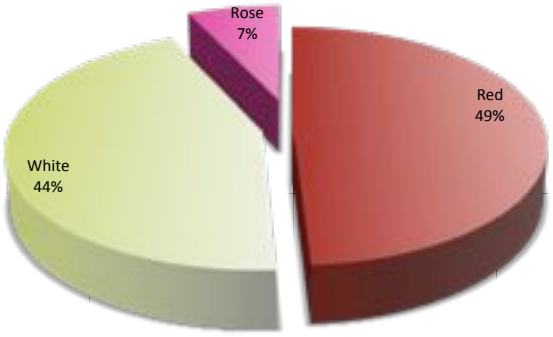
Red vs. White consumption

Red and rosé wine consumption has slightly increased in relation to white:

UK: Consumption of imported SLW by type (2002) [source: IWSR]



UK: Consumption of imported SLW by type (2006) [source: IWSR]



Source: Based on data provided by *IWSR, Global Wine Handbook 2007*

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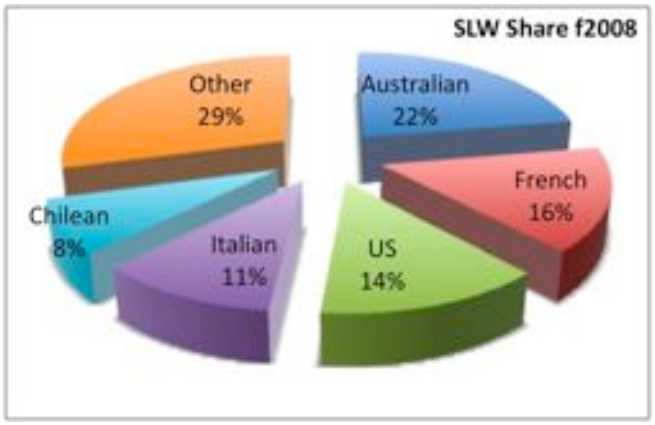
Consumption per country of origin

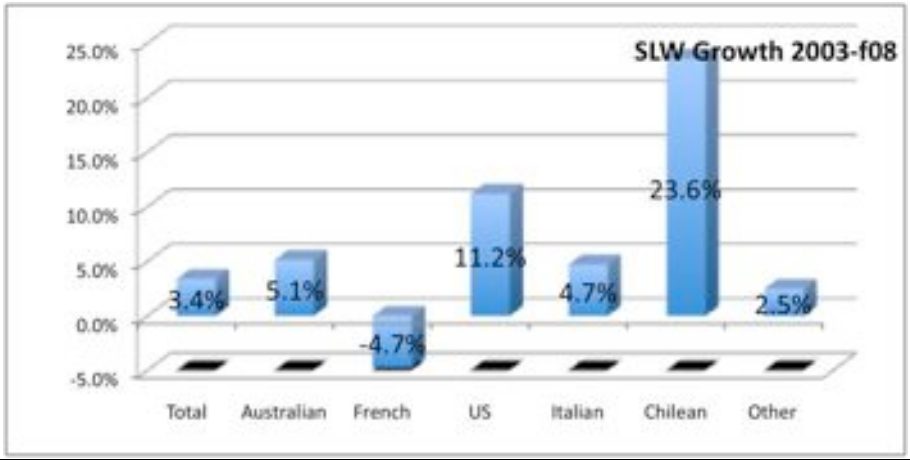
Market role analysis[35]

Australian wine is today's undisputable market leader, with French and US wine left lagging at a Follower role.



Source: Based on data provided by *IWSR, UK Index, June 2008*

World leader Italy and New World's Chile are niche players, it must be noted however that Chile and the US are showing very high growth rates and may take more significant roles in the future:



Source: Based on data provided by *IWSR, UK Index, June 2008*

It must also be noted that the UK is Australia's and Chile's biggest export market.

[35] - 2002-2006 data taken from IWSR Global Wine Handbook 2008.
- 2007 - f2008 data and all Chile data taken from IWSR United Kingdom INDEX report 2008
- South Africa was in position 5 until 2006, when it was exceeded by Chile and Spain
- Chile data for 2002 were not available. 1998 data were used.

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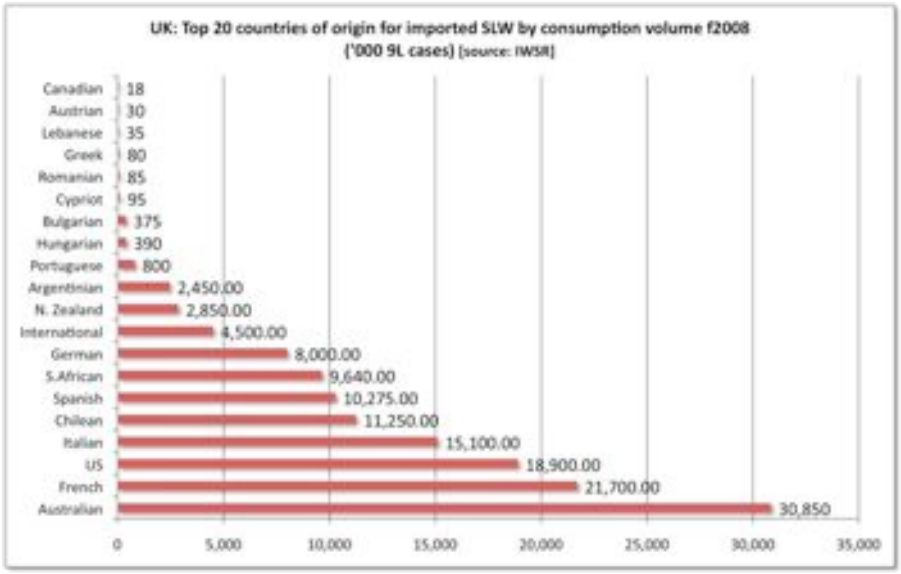
The rest of the competition

As previously mentioned, the UK is one of the world's most important «arenas» for competing wine producing counties and most of the global wine industry's players have a presence:



Source: Based on data provided by *IWSR, UK Index, June 2008*

Spanish wines come 6th in sales volume, ranking a position lower than Chilean wines and similarly South African wines rank in 8th place. This may appear unusual but Chile has been very successful in establishing its wines in the UK market and surpassed Spain and South Africa in 2004 and 2006 respectively.

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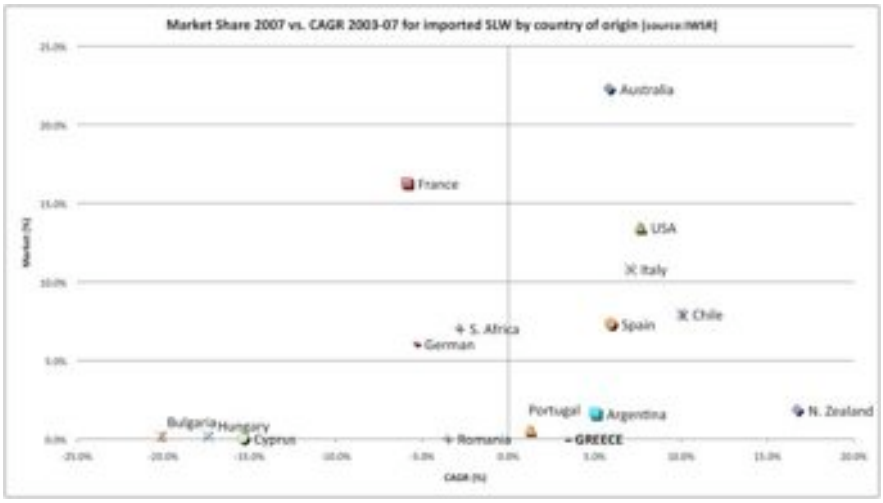
The following plot diagram paints a clear picture of the international competition in the UK market[36]:



Source: Based on data provided by *IWSR, UK Index, June 2008*

The plot reveals a key niche player in New Zealand that has a very small share on total consumption volume (1.9%) but has an average annual growth rate of 16.7%, which is 67% higher than that of the second fastest growing competitor, Chile.

Additionaly, France's decline in recent years is shown clearly with a negative CAGR which is forecasted to continue in 2008.

[36] Growth here is measured as the Compound Average Growth Rate (CAGR): CAGR is the geometric mean growth rate on an annualized basis and it represents the smoothed annualized gain/loss achieved over the entire period in question. CAGR dampens the effect of volatility of periodic gains/losses that can render arithmetic means irrelevant, and is calculated by the formula:

$$\mathrm{CAGR}(t_0, t_n) = \left(\frac{V(t_n)}{V(t_0)}\right)^{\frac{1}{t_n - t_0}} - 1$$

where $V(t_0)$: start value, $V(tn)$: finish value, $tn - t_0$: number of years.

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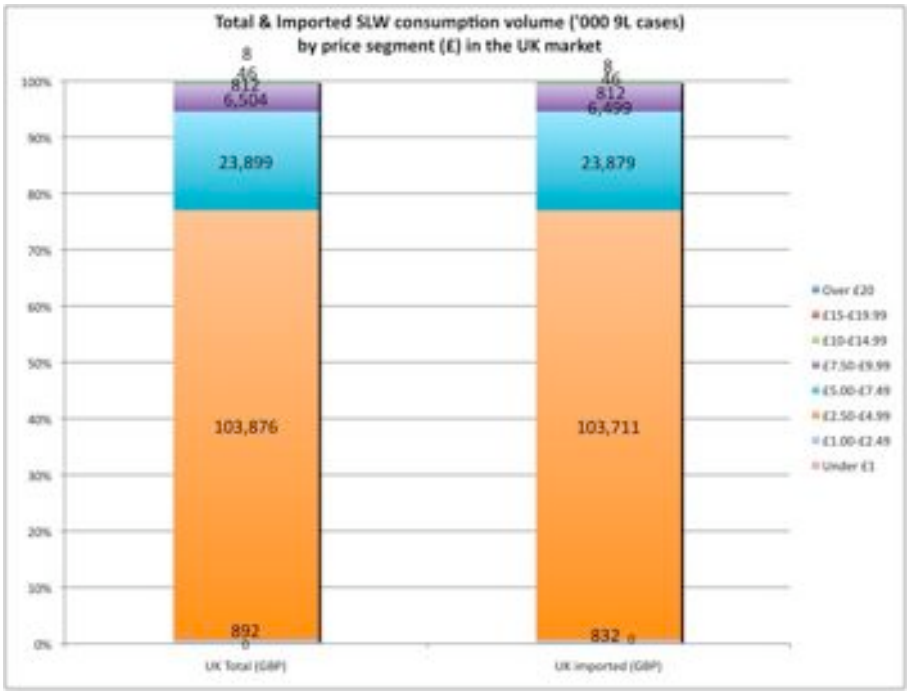
Consumption per price segment

The following graphs shows consumption volume per price segment[37] in the UK market, both for total and imported wine:



Source: Based on data provided by *IWSR, UK Index, June 2008*

Understandably, the two price structures are virtually identical. The £2.50 - £4.99 price segment dominates the market as £3.99 is perceived as the right price for every-day wine of good quality. The two higher price categories from £5.00 to £9.99 also have a presence in the market but due to the relatively good quality at the basic price level, the intense competition both between producers and retailers that drives prices down, and the lack of wine knowledge on the consumers' part, it is becoming an increasingly greater challenge to persuade wine drinkers there is a reason to buy at premium price points.

[37] Prices are retail shelf prices based on retail audits conducted in leading supermarkets

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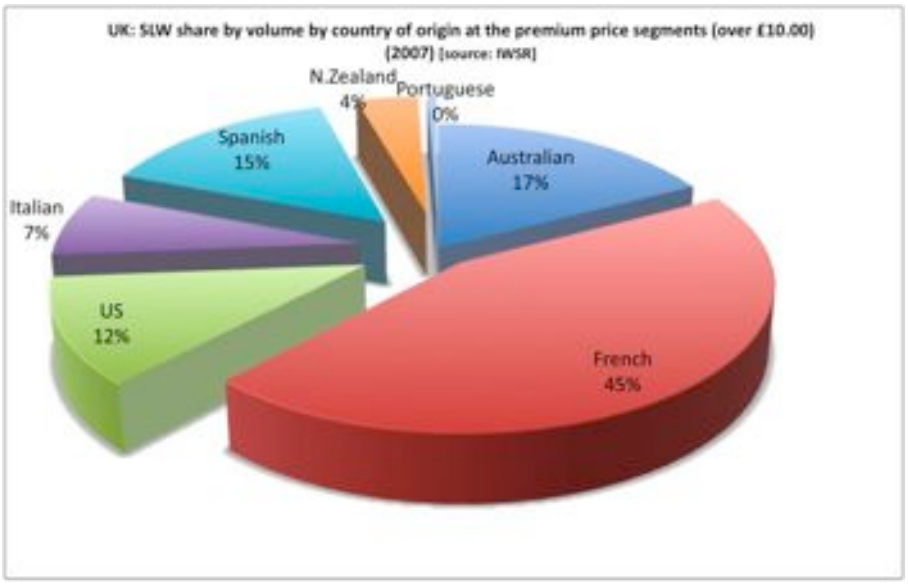
Major brands in each price segment

Country level

At the premium price segments (£10.00 and higher), France is the indisputable leader, as the following chart reveals:



Source: Based on data provided by *IWSR, UK Index, June 2008*

At the remaining price levels, countries assume market roles as analysed in previous sections of this report.

Brand level

With regards to the popular price segments (£2.50-£7.49) which represent approximately 95% of sales volume, the biggest brands are shown in the table that follows:

Country of Origin	Brand	Distributor	Quantity 2007 ('000 9Lt Cases)
Australian	Hardy's Still Wine	Constellation UK	7,123.00
US	Gallo Still Wine	Gallo	6,113.00
US	Blossom Hill Wine	Diageo	5,262.00
International	Stowells Wine Box	Constellation UK	4,000.00
Australian	Jacobs Creek Still Wine	PR UK	3,500.00

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South African	Kumala South African Still Wine	Constellation UK	1,997.00
Australian	Lindemans Still Wine	Fosters	1,851.00
Australian	Wolf Blass Wine	Fosters	1,734.00
US	Echo Falls US Wine	Matthew Clark	1,725.00
Chilean	Concha y Toro Range	Concha y Toro UK	1,701.00
Australian	Banrock Station Wine	Constellation UK	1,680.00
French	Chenet	G.C.F.	1,507.50
South African	First Cape South African Wine	Brand Phoenix	1,412.00
Chilean	Cono Sur	Wavarley TBS	1,335.00
South African	Namaqua South African Wine	Raisin Social	1,100.00
Chilean	Isla Negra	Constellation UK	1,000.00
US	Coldwater Creek US Wine	Brown Foreman	795.00
Australian	Rosemount Still Wine	Fosters	710.00
French	Piat D'Or	Percy Fox	692.50
New Zealand	Montana	PR UK	660.00
Chilean	San Pedro Chilean Still Wine	G.C.F.	598.50
Australian	Calloway Crossing Australian Still Wine	McGuigan Simeon	575.00
New Zealand	Oyster Bay	Delegat's	550.00
Chilean	Luis Felipe Edwards	D&D Wines	542.50
Italian	Canti	D&D Wines	540.00

Source: Based on data provided by *IWSR, UK Index, June 2008*

The top 5 and top 25 brands stand for 19.1% and 35.9% of the total imported brand sales for 2007 respectively.

Appendix A provides top-line brand analysis profiles for the top selling producer brands (in the US, UK and German markets) segmented by country of origin. Each brand analysis form features brand name, signature, tagline and basic imagery for each of the wineries as well as their corresponding flagship product brands.

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Market structure

Distribution system and major players

In contrast to the US's complex 3-tier distribution system (which is analysed in the corresponding section), the UK has a simpler system where importers are also licensed as distributors. The market's largest distributors[38] are:

Large multinationals	
Matthew Clark	Matthew Clark (**www.matthewclark.co.uk**) A Constellation Brands company, M.C. offers a wide portfolio of wines, spirits and liqueurs, beers, ciders, PPS and soft drinks. Brands: Hardy's, Stowells, Kumala, Echo Falls, Banrock Station, Isla Negra
Pernod Ricard	Pernod Ricard UK (www.pernod-ricard.com) Pernod Ricard is "the world's co-leader in wines and spirits". The companyis focusing on its key brands, builds its premium product portfolio, invests in emerging markets and expands through acquisitions. Brands: Siglo, Campo Viejo, Jacob's Creek, Mumm.
Percy Fox & Co	Percy Fox (Diageo) (**www.percyfox.co.uk**) Focuses on creating value through "its brands and its people". Its wine portfolio covers Old/ New world wine, Champagne and Sparkling. The company is part of Diageo. Brands: Blossom Hill, Piat D'Or, Pommery, babich, Charles Lafitte
FOSTER'S GROUP	Fosters (**www.fosters.com.au**) Based on Australia and featuring a very strong beer brand, the group brings to the UK wines of the New World and brands from California, New Zealand and Australia. Foster's claims the strongest premium import portfolio in the UK and Europe. Brands: Lindemans, Wolf Blass, Rosemount, Penfolds

[38] With an emphasis on supplying London and the South East

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	Waverley TBS (**www.waverleytbs.co.uk**) The UK's leading independent drinks wholesaler, claiming 1 in every bottles of wine sold in the country. The company has its own "flying winemakers" working with wineries around the world to provide exclusive ranges, such as Moondarra, Olver&Craig's and Cape Promise.The company's portfolio consists of both mainstream andniche brands. Brands: Cono Sur
	G.C.F. (**www.gcfplanet.com**) The French leader in wines and spirits exports, GCF has a persence in almost all wine regions of France, and a global commercial reach. The company works in close partnership with vineyards and producers to achieve best results. Brands:Chenet
	Moët Hennessy (**http://www.lvmh.com**) Part of the Moët Hennessy- Louis Vuiton Group. The Group owns a strong portfolio of leading premium/ luxury brands around the globe. Brands: Moët& Chandon, Dom Pérignon, Veuve Clicquot, Krug, Mercier, Hennessy, Chandon, Cloudy Bay
Origin specialists	
	Enotria Wines (**www.enotria.co.uk**) One of the UK's leading importers and distributors for wine, the company has a portfolio with French, Italian and New World wines. The company represents over 200 producers and 1,500 wines. Brands: Peter Lehmann, Henriot
	Liberty Wines (**www.libertywine.co.uk**) Awarded Agent of the Year at the 2008 International Wine Challenge and Italian Specialist Merchant of the Year for the 8th time in 10 years. The company focuses on Italian wines but has a diversified portfolio representing both old world and new world.

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Fields, Morris & Verdin	Fields Morris & Verdin (Berry Bros & Rudd) (**www.fmvwines.com**) The company focuses on high quality wines and Champagnes, supplying both the on- and off-trade channels. Works with fine domaines and wine estates that can support its premium portfolio
thierry's	Thierry's (**www.thierrys.co.uk**) The company accounts for 1 in 16 bottles entering the UK, with a total 6% of the wine market. Thierry's is the largest importer of French wines to the UK with 4m cases p.a. and 25% of the French imported wine market. The company is diversifying its portfolio with wines from a variety of countries and the New World. Brands: Cape Grace, Caves Saint Pierre, Gerard Bertrand, Laboure Roi, Mont Tauch, Micolas Feuillate, Tariquet, Terra Vecchia
	Thorman Hunt Brands: Dom du Vieux Telegraphe, Andre Dezat, and several top small growers in Loire, Rhone and Beaujolais
Generalists	
BIBENDUM	Bibendum (**www.bibendum-wine.co.uk**) Claiming to be the "most accessible, relevant and captivating wine company in the business, Bibendum, supplying the off-trade, the on-trade as well as retail customers with both mainstream and fine wines. Brands: Alamos Ridge, Libertad, Catena Zapata, Graham Beck
Fells Fine wines since 1858	John Fells & Sons (**www.fells.co.uk**) One of the leading fine wine importers in the UK, supplying all channels. Brands: Torres, Jackson Family, Baron Philippe de Rothschild, Hugel et Fils, Guigal, Symington Ports, Hugel, Bouchard Pere, William Fevre
Mentzendorff	Mentzendorff & Co (**www.mentzendorff.co.uk**) Represents family-owned producers of the

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	Old and New World, focusing on fine quality wine. Brands: Bollinger, Taylor Fonseca Port, Chapoutier, Hidalgo
HATCH MANSFIELD	Hatch Mansfield (**www.hatchmansfield.com**) Niche company focusing on serving a small number of agents/ producers Brands: Taittinger, Errazuriz, Villa Maria, St Francis, Louis Jadot, McKinley Vintners
BERKMANN WINE CELLARS	Berkmann (**www.berkmann.co.uk**) Independent wholesaler distributing both to on- and off- trade with basic, household brands as well as premium, niche wines. Brands: Georges Duboeuf, Julian Chivite, Bodega Norton, Delas, Antinori, Casa Lapostole.
Les Caves de Pyrène	Caves de Pyrène (**www.lescaves.co.uk**) Small company founded by a group of friends who love wine. With the company's initial focus on French wine, CdP today also offers wine from Portugal, Italy, Greece (Hatzidakis), Morocco, Lebanon, Germany, New Zealand, Australia, Chile Argentina, US and South Africa.
COE VINTNERS	Coe Vintners (**www.coevintners.com**) Independent importer and wholesaler offering both affordable and fine wines from well established as well as developing regions around the world. Brands: Kendall Jackson, St. Francis, Caliterra and exclusive brands such as Lagarde and Santa Puerta.
Boutinot	Boutinot (**www.boutinot.com**) Producer, importer and distributor with a diversified portfolio of wines that express their region and varietal and offer "genuine quality at every price point" Brands: Meridian Wines, Capricorn, Paul Boutinot

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	Novum wines (**www.novumwines.com**) The company's mission is to source "exciting new producers never seen before in the UK". Steve Daniel is Novum's wine buyer. Brands: Linda Domas, Perez Cruz, Tramin, Gaia Estate, Biblia Chora, Alpha Estate
	Vickbar (**www.vickbarwines.co.uk**) Representing distinctive and acclaimed wines from Greece, Croatia and New Zealand Brands: Ortonero, Gibbston Valley, NGA WAKA, Alpha estate, Argyros, Emery, Gerovassiliou, Karydas, Katsaros, Mercouri, Kir Yianni, Prparoussis, Nico Lazaridi, Pavlidis, Sigalas, Tselepos, Voyatzis.

Taxation and excise duties

Excise duties make up for 40% of the total price paid for wine in the UK, one of the highest levels of taxation in Europe. Although over the past decade, increases in excise duty have increased slightly below the annual inflation rate, further increases on taxation are being considered as a counter-measure against binge drinking. To this end there was a total duty increase of 17% in 2008. It is estimated that excise duties will increase by 2% above inflation for the next 4 years.

In March 2009, British Prime Minister Gordon Brown has rejected proposals to introduce a minimum price system for alcohol. According to the Wine and Spirit Trade Association, such a system would leave the ordinary consumer at a serious disadvantage, as it would have resulted in the average bottle of wine costing a minimum of £5.05 – a huge increase in the current average price of £4.01.

Retail channels

Even though in-home drinking has been on the rise during the last decade and driving off-trade sales, the increasing popularity of wine as an ideal food accompnaniment and the rise of gastro-pubs have favored on-trade wine sales as well. Most of the value in wine sales in 2006 was being in the on-trade (£5,202m or 56%), yet less than 20% of volume (197m lt. or 16.9%)[39] was sold this way.

However, the economic downturn has pushed consumers towards off-trade purchases. According to industry sources, UK consumers are now trading down but buying more, thus making up for their savings per bottle.

[39] Mintel, Wine Retailing UK, June 2007

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Wine Intelligence reports that fine wine sales have been doing well in the premium segment in the off-trade, «even if the supermarkets are focusing efforts on deals such as three-for-£10».

The following pie charts show evolution of wine expenditure in the on- and off- trade both in terms of volume and value:

Source: *Mintel, Wine Retailing, UK June 2007*

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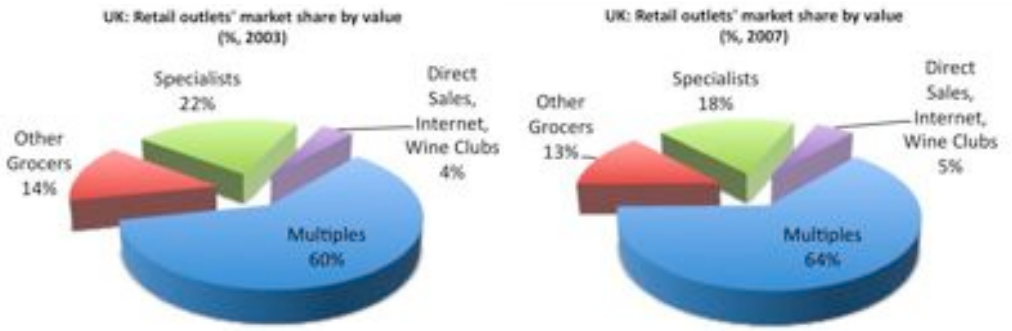
The off-trade

The off-trade represents about 80% of the UK wine market by volume[40]. Competition in the off-trade is intense, not only at product (and country of origin) level but also at channel and retailer level,mostly due to the wide variety of retail outlets licenced to sell alcohol. Those include specialist off-licenses, wine merchants, supermarkets, convenience stores, petrol station forecourt shops and video shops.

The following graphs show evolution in retail outlets' market shares by value:



Source: *Mintel, Wine Retailing, UK June 2007*

Non-specialist retailers

Supermarkers dominate the total wine market with a 46% share. Tesco with 22.7% and Sainsbury's with 14.1% are the main players, with Morrisons, Somerfield, Waitrose and M&S at follower and niche roles[41]. Specialist retailers represent 20% of the market, a share that is now on the drop for a number of reasons:

- With the advent of the "convenience" store format (smaller-sized supermarkets offering the essentials for top-up purchases, located at residential locations or city centers and operating extended opening hours), supermarket chains can compete directly with off-licences and cover impulse and emergency shopping needs
- Supermarkets concentrate buying power, can push producers and suppliers to lower their prices and ultimately deliver lower prices for consumers
- Lower prices aside, supermarket chains today often provide a greater selection of wines

Additionally, in an effort to increase sales value, supermarkets have been introducing "fine wines" sections, featuring premium products and providing guidance to the consumer through specially trained sales staff . In an effort to enhance consumers' understanding of the product –and thus claim higher prices per bottle- Tesco is

[40] Confirmed by IWSR, Datamonitor and Mintel data
[41] Mintel, Wine Retailing UK, June 2007

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taking a step forward, introducing a virtual wine technology system to help customers selection. The Virtual Wine Advisor, currently being tested in six of Tesco's largest stores, enables customers to select wines by country, colour, style and price. Moreover, customers can also scan their selected wine for more detailed background information on the product, including food matches and recent press quotes.

Specialist retailers

With regards to specialist retailers, Thresher's is the market leader with 2,000 outlets and a 9.5% share, which has decreased by 2% since 2003. Majestic with 133 stores and a 3.6% share is the only specialist chain that has shown some improvement in recent years, going up by 0.6% since 2003. Oddbins has 268 stores and a 1.9% share.

The internet

Internet sales and postal order, currently used by 6% of the general population (and 1% of the ABs social classification) for purchasing wine, are growing according to research[42]. Appealing mainly to the more affluent consumer, the internet is proving ideal for wine sales as it allows for easier selection and comparison and provides buyers the option to make an informed choice through reading relevant reviews, minus the hassle of the bulky transport from an actual retail outlet.

Furthermore, discounts are available in the online trade and the choice is often wider too. Internet wine clubs and stores are proving to be an ideal channel for the wines of smaller producers who do not have the quantity (or the price) to supply supermarkets.

Direct Wines is the UKs largest direct order wine supplier, operating a variety of wine clubs such as that for the Sunday Times and British Airways along its Laithwaites mail order. Internet sales have also increased in popularity through the online channels of major retailers, such as Tesco.

It must be noted that the vast majority of UK retailers today operate online stores: Tesco, Sainsbury's, Asda, Waitrose, M&S, Oddbins and Majectic, all engage in e-commerce.

[42] Mintel, Wine Retailing June 2007

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Major retailers in the off-trade

The following table provides a bried description for each of the main retailers in the off-trade, by type:

Non-specialist retailers	
Waitrose WaitroseWineDirect	Waitrose (**www.waitrose.com**) Waitrose is the supermarket division of British retailer John Lewis Partnership, with 193 branches. Waitrose targets the up-market consumer by selling high quality food and emphasizing on customer service. Waitrose's main competitors in this market are Marks & Spencer and Sainsbury's. It currently has a 4% share of the food market. Waitrose lists French wines under separate regional categories (Alsace, Bordeaux, Burgundy, Loire, Rhone, South, Champagne). France leads the portfolio (357 labels), Australia comes second (130) and Italy third (83). Spain, South Africa, Chile, New Zealand, US and England (!) all fall in the 35-65 labels category. Argentina follows (24) and Germany (27) and Austria (10) have a stronger presence than with most other retailers. Waitrose is running an "Australian Special" theme currently, with special offer on Australian wine. Waitrose also operates its own internet wine store.
Sainsbury's	Sainsbury's (**www.sainsburys.co.uk**) Sainsbury's is the third largest chain of supermarkets in the United Kingdom. It grew to become the largest grocery retailer in 1922 and pioneered self- service retailing in the UK. The chain enjoyed its zenith during the 1980s. Sainsbury's puts heavy emphasis on French (98 labels) and Australian (83). Italian comes third (63) and "North American" (essentially US) comes fourth (55). Wines from Chile and Argentina are presented together under the "South America" category, with more wines from Chile present. Similarly, Spanish and Portuguese wines fall under separate categories in the red wine section but under the same in the white wines section. Other European wines have a very small presence and that is mainly in the white wines section

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	with German wines mostly. Sainsbury's has a top list of recommendations which currently features 2 Italian, 2 Chilean and 4 US wines.
TESCO TESCO WINE CLUB	Tesco (**www.tesco.com**) Tesco is a British-based international grocery and general merchandising retail chain. It is the largest British retailer by both global sales and domestic market share. In 2008, Tesco became the world's fourth largest retailer, the first movement among the top five since 2003. Tesco's range includes French (179 labels), Australian (134), Italian (72), together representing 62.6% of its total range. Tesco portfolio's also includes Chilean, New Zealand, South African, Spanish and US wines. Tesco also operates its own internet wine store.
ASDA part of the WAL-MART family	ASDA (**www.asda.co.uk**) Asda is a United Kingdom supermarket chain which retails food, clothing, toys and general merchandise. It became a subsidiary of the American retail giant Wal-Mart, the world's largest retailer, in 1999, and is the second largest chain in the UK after Tesco, having overtaken Sainsbury's in 2003. Asda's marketing promotions have usually been based solely on price, with Asda promoting itself under the slogan "Britain's Lowest Priced Supermarket, 11 Years Running."
MARKS & SPENCER	Marks & Spenser (**www.marksandspencer.com**) Marks & Spencer is a British retailer, with 843 stores in more than 30 countries around the world, 600 domestic and 240 international. It is the largest clothing retailer in the United Kingdom, as well as being a food retailer, and as of 2008, the 43rd largest retailer in the world. M&S, in line with the other major retailers puts its emphasis on French wine (199 labels) and secondarily on Australian (71). Italian, Chilean and Spanish fall in second tier with significantly smaller number of labels (35-55) and are followed by South Africa and New Zealand (around 25). The US, Portugal, Argentina, Germany, Hungary

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	and England come last with only a niche presence in the portfolio. Current "weekly recommended" wines by M&S are 2 New Zealand and 1 French; it must be noted however that in the "Recommended by the press" section of the site, French wines dominate (6 recommendations) with 3 Italian and 1 Spanish to complete the list.
Specialist retailers	
	Nicolas (**http://www.nicolas.com**) Nicolas is a worldwide wine retailer with 522 branches in France, 80 in England, 8 in Belgium, 1 in Poland, 2 in Russia and 1 in Morocco. It forms part of the CASTEL Group. Nicolas is perceived as the top wine retailer in terms of range and quality of French wines attracting upmarket affluent consumers.
	Majestic Wine (**www.majestic.co.uk**) Majestic was formed in 1981, initially with just a single store in London's Wood Green. Today Majestic Wine Warehouses is the UK's largest wine warehouse chain, with nearly 150 stores in England, Scotland and Wales, as well as three stores under the Wine & Beer World banner in the channel ports of France. Majestic Wine operates as a mixed case retailer, selling a mixture of wine, champagne and spirits with a minimum purchase of twelve bottles. Having such a policy has allowed the retailer to offer customers free tasting, free delivery and free glass hire. Majestic follows Waitrose in separating France into regions. French wine leads (365 labels), Australian, Chilean, Italian, Spanish and South African follow in the 35-65 range, New Zealand, Argentinean and US fall third (20-25 labels) and German and Portuguese wines are at around 5 labels each. Majectic Wine also operates its own internet wine store.
	Oddbins (**www.oddbins.com**) Oddbins started as wine retailers in 1970s owned by Dennis Ing and Nick Baile who introduced Britain to the wines of Portugal and the South of France. In 2000 and 2001 the retailer won Wine Merchant of the Year.

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	Oddbins owns 164 stores in the UK, including 20 in London, stores in Ireland and a store in Calais, France. Oddbins is the only main retailer with which French wines don't have first place in its portfolio. Australia (112 labels) marginally outranks France (106) and Chile, South Africa, Italy, Spain and New Zealand follow (35-65 range). Argentina and US come under the 10-20 labels category and Germany, Austria, Hungary and Greece (with Xerolithia and Mirambelo from Creta Olympias) have a presence too. Oddbins also operates its own internet wine store.
	Wine rack (**www.winerack.co.uk**) Wine Rack has 134 stores throughout the UK and is owned by First Quench Retailing, the 13th largest private retailer in the UK, serving over 150 million customers a year across its different brands. Wine Rack stores currently stock in excess of 350 different wines, offering award-winning vintages to exclusive ranges such as Origin and Radcliffes. Additionally, it stocks a wide selection of world beers, spirits and mixers. Wine Rack has a broad customer base attracting consumers from different segments.
High-end Department Stores	
	Selfridges & Co (**www.selfridges.com**) Selfridges is a chain of department stores in the United Kingdom. Founded by American entrepreneur Harry Gordon Selfridges, the flagship store in London's Oxford Street is the second largest shop in the UK (after Harrods) and was opened on 15 March 1909. Three other stores have opened since: Trafford, Greater Manchester (1998), Manchester (2002) and Birmingham (2003).
	Fortnum & Mason (**www.fortnumandmason.com**) Fortnum & Mason is a worldwide famous store which has held many Royal Warrants for over 150 years and is the shop most closely associated with the British Royal Family. It is an upmarket department store located in Piccadilly, London, established in

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	1707 by William Fortnum and Hugh Mason.
	Harrods (**www.harrods.com**) Harrods is a department store located in Knightsbridge, London. Since the store first opened its doors in 1849, Harrods has always prided itself on a reputation for excellence and finding the finest-quality merchandise. The Harrods brand also applies to other enterprises undertaken by the Harrods group of companies including Harrods Bank, Harrods Estates, Harrods Aviation and Air Harrods. The store occupies 18,000 m2 and has over 1 million square feet of selling space in over 330 departments. Noël Coward, Sigmund Freud, Oscar Wilde, Queen Mary, AA Milne and Pierce Brosnan have each added their own mark as customers.
	John Lewis (**www.johnlewis.com**) John Lewis is a chain of upmarket department stores operating throughout Great Britain and popular amongst the British middle class for its high quality goods. There are currently 27 stores throughout England and Scotland and a further 8 stores are confirmed to open in the next 5 years. On January 2008, John Lewis Oxford Street was awarded a Royal Warrant from Her Majesty the Queen as suppliers of haberdashery and household goods. The John Lewis shop in Reading, Berkshire also has a Royal Warrant from the Queen as suppliers of household and fancy goods, received on January 2007. John Lewis is positioned in the retail market above Marks and Spencer and Debenhams and at a lower level to Selfridges.
	Harvey Nichols (**www.harveynichols.com**) Harvey Nichols founded in 1813, is an upmarket department store chain. Its original store is in London, but it expanded to Leeds, and later to more cities in the United Kingdom and elsewhere. The store offers many of the world's most prestigious brands in womenswear, menswear, accessories, beauty, food, and home. Harvey Nichols attracts younger shoppers than its rival Harrods but tends to be more expensive.

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Internet Retailers	
Laithwaites	Laithwaites (**www.laithwaites.co.uk**) The company started 1969 and today they serve over 700,000 regular customers from a list of 4000 wines. In order to make their selection the company's experts taste over 40,000 wines.
Virgin wines	Virgin wines (**www.virginwines.com**) Virgin Wines was originally set up in the United Kingdom by Richard Branson as a web-based wine selling company and it was sold to Direct Wines in 2005. The website is presented as a wine boutique selling high quality hand crafted wines.
Berry Bros & Rudd	Berry Bros. & Rudd (**www.bbr.com**) Berry Bros. & Rudd is Britain's oldest wine and spirit merchant, having traded from the same shop for over 300 years. The business was officially established in 1698 by the Widow Bourne at 3 St James's Street in London, opposite St James's Palace. In 1994 Berry Bros. & Rudd launched one of the first online wine shops, which is now regarded as Britain's leading wine website.
lebonvin.co.uk	Le Bon Vin (**www.lebonvin.co.uk**) Le Bon Vin has been supplying wine since 1986, importing the majority of wines and spirits direct from their country of origin. The company sells wines on the internet since 2003 and their website is becoming one of the UK's top wine online stores due to the range of the offered products and the company's commitment to low prices and quality wines.
ChateauOnline	Chateau Online (**www.chateauonline.com**) ChateauOnline is one the biggest online wine stores on the web and has different sites for France, UK, Germany, Italy, Belgium, Holland, Denmark, Luxemburg and Russia. The UK online store offers a wide selection of wines from all over the world. ChateauOnline unique selling point is sommelier Jean-Michel

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	Deluc, formerly of the Paris Ritz hotel, who chooses and recommends their wines.
CADMAN FINE WINES Quality is merely a starting point...	Cadman Fine Wines (**www.cadmanfinewines.co.uk**) Cadman Fine Wines sells carefully sourced wines and the store. Wine is sourced by Cadman's team of experts based in Italy, France, Spain and the UK. To achieve a Cadman Fine Wines listing, each wine must score at least 88 points in their quality rating system. Cadman Fine Wines is a wholly-owned subsidiary of the Venulum Group.

Source: Critical Publics, Greek Wine Mystery Shopping, London October 2008 and Wine Online Shopping Review-Top UK Online Wine Retailers, October 2008

Price brackets for price-based wine categories in the off-trade

The following table presents the 5 main classifications for bottled wine based on the product's retail price and the corresponding price brackets per bottle[43]:

Category	Price bracket (£)
Super value wines (the most inexpensive ones)	<4.99
Basic or sup-premium wines (the next level up)	5-7
Premium wines (the next level up)	7-9.99
Super premium wines (the next level up)	10-20
Ultra premium or deluxe wines (the next level up)	20-29.99
Icon wines (most expensive, yet nor rare collectable wines)	30-50

The on-trade

The UK on-trade sector represents appriximately 20% of the total wine market by volume[44] and comprises of over 58,000 pubs and 29,000 clubs, in addition to hotels, restaurants and other licensed businesses[45]. Despite the minority share on wine volume, the on-trade accounts for 56% of the markets value, with £5,394m sales estimated for 2007 against £4,239 for the off-trade.

Although the smoking ban has driven people to drink more at home, on-trade wine sales have seen a 16.6% increase in the period 2001-2006 due mainly to:

[43] Price brackets may fluctuate according to source
[44] Datamonitor, Wine in the United Kingdom Industry Profile, November 2007
[45] Mintel, Wine retailing UK, June 2007

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- The shift towards food-related sales. An increasing number of pubs offer meals and wine is seen as an ideal companion
- Over the past years the quality of wine lists on offer has seen drastic improvement, in line with the growing wine culture, urging consumers to try not only established wines but also go for the less obvious choices

A list of the top trend-setting restaurants and bars in the urban «creative class» centres of the US is provided in Appendix C: Wine & Gastronomy Catalysts (see also following section on Wine & Gastronomy Catalysts).

Catalysts, trends, consumer perceptions and behavior analysis

The following section identifies catalysts and trends in the wine domain, consumer perceptions regarding wine, as well as behavioral patterns influencing purchases in the UK wine market.

N.B.: Due to the fact that global sustaining and emerging trends in the wine domain are exhaustively presented and analysed within Deliverable 1.1, the present analysis only highlights those trends among them that are predominant for UK consumers.

Wine & gastronomy catalysts

Within the scope of the present study, the opinion-leading entities in the wider wine, gastronomy and entertainment domains, which shape consumers' perceptions and behavior, were identified and profiled.

The selected catalysts are either related to the wine industry or draw wine enthusiasts or appeal to an audience that enjoys wine in general, and were selected according to their degree of influence in the UK market. Thus, they include:

- Influential lifestyle, variety, well-being, gastronomy and wine media as well as those regarded as catalysts irrespective of subject – however they feature wine sections or ad hoc articles; these include print, online, social and audiovisual media
- Influential professionals such as chefs, wine experts, editors and other gastronomy celebrities have been included
- Venues such as trend-setting restaurants and bars have also been researched
- High profile industry events targeted at trade players or end-consumers, such as awards, fairs and exhibitions.

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Although there cannot be a definitive rule regarding who is considered to be a catalyst, certain patterns and common features emerge from research. The significance of the creative class becomes apparent in view of the profile and locus of the identified catalysts. The creative class, a term introduced by social scientist Dr. Richard Florida, describes a group of people, that are considered to be a key driving force for economic development of post-industrial cities; it consists of scientists, engineers, managers, innovators and people in research and development, as well as artists, writers and musicians, thinkers, decision-makers, who influence cultural phenomena and impact business . Their impact not only on the evolution of the consequent creative centres but also on the further concentration of individuals that excel in their domains is evident.

In the context of the present analysis it is apparent that wine and gastronomy catalysts identified can be traced to a large extent in the so-called creative centres. Appendix B provides the necessary background analysis for the identication and profiling of urban «creative centres» in the 3 reference country-markets.

Wine and gastronomy catalysts are presented and profiled in Appendix C in an extensive –yet not exhaustive- list. The methodology for the initial selection and finalisation of catalysts list is also presented in the Appendix. It should be noted that factors such as recognition, i.e. awards or Michelin stars, popularity, circulation and readership were primary.

Trends and consumer perceptions on wine

Even though global sustaining and emerging trends in the wine domain are exhaustively presented and analysed within Deliverable 1.1, the section hereafter aims to briefly highlight those trends among them that will mostly affect the UK wine market in the near future.

In-house consumpion

In-house wine consumption, as mentioned in several points so far in this report, is a key characteristic of the UK market, showing considerable growth over the past years. In 2006, 47.4% of respondents asked agreed with the statement «most of my drinking is done at home», a 9.2% increase over a decade. The trend is pushed by a growing dislike for pubs and the associated binge drinking culture, the effect of the smoking ban and a rise on social entertaining at home.

Drinking at home, also perceived as the ideal reward after a hard day, as an end of the week treat or even more as an an inseparable aspect of socialising is now integrated in the British lifestyle. Supermarkets played a major role in establishing the trend by moving from small, daunting, hard to understand wine shelves to extended offerings complete with wines of the New World, which offered a user-

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friendly and fun approach and succeeded in breaking down social barriers associated with wine. This was combined with the promotion of brands that make wine a less risky option than it once was, giving rise to the trend which is constantly fueled by the big promotions and discount strategies of retailers.

In-house consumption and home entertaining in particular is expected to influence heavily wine consumption and give rise to more shoping occasions and wine styles (eg. Premium wine as a gift on a visit).

Responsible drinking

Binge drinking (excessive, uncontrolled alcohol consumption and associated behaviours) is an issue that the UK has tried to deal with in many ways. This is not a new item on the UK's agenda, as it carries significant cost to public services and healthcare aside from the obvious implications with law and order.

With the on-trade instituting and enforcing legislation with regards to underage consumption and opening hours (longer opening hours leads to people drinking slower and avoiding high levels of intoxication) to prevent binge drinking, the off-trade and its discount practises is today largely blamed for the phenomenon.

With regards to under-age drinking, despite all efforts, 29% of on-trade and 21% of off-trade premises were found to be selling to minors. The Challenge 21 scheme (requesting younger-looking consumers to provide ID when purchasing alcohol) has not delivered significant results.

To that extend, new labels that highlight the effects of excessive drinking will be introduced shortly and further legislation is expected in the future to put a hault on the phenomenon. To reduce the under-age drinking problem, the Violent Crime Reduction Bill will deliver harsher penalties to outlets that break the law and sell to minors. The effect these actions will have on wine consumption cannot be predicted yet.

Retailers are concerned about being perceived as socialy responsible, yet at the same time are wary of any forthcoming legislations that may affect their tactics. In 2004, the UK government published its Alcohol Harm Reduction Strategy, which focuses on:

- Education and communication
- Improving health and treatment services
- Combating alcohol related crime and disorder
- Working with the industry

Participation in the scheme is currently voluntary, although the threat of legislation is real if insufficient change is not seen.

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Furthermore, the EU Wine Plan for Responsible Consumption Communication was launched in the UK in April 2007. Aiming to ensure that wine is promoted in a way that encourages moderation and responsibility in alcohol consumption, the initiative is based around a 'common message', an 'Art de Vivre' education campaign, and the European Wine Communication Standards. The initiative will be communicated through the new Wine Information Council.

Admittedly, the binge drinking culture is less related to wine than other spirits. Still, this is an industry-wide issue affecting all. The main issue for the wine industry in the UK market is to build demand in younger demographics, yet still not to encourage, or even appear to encourage, binge drinking; in other terms, to persuade people to switch to wine, not increase their alcohol consumption.

Fighting the «mega-serving» trend

In relation to the previous point, a recent development has been introduced which involves the regulation of alcohol serving sizes. Lately, an increasing number of pubs have been using «small» and «large» glass sizes of 175ml and 250ml to serve wine to their patrons, far exceeding the standard size for wine glass which used to be 125ml – or approximately one unit of alcohol. It has also been observed that 1 in 10 pubs use the 250ml glass as standard (1/3 of a wine bottle), which contains approximately 3.5 units of alcohol. It is believed that this can push drinkers over the safe drinking limit for driving, in many cases without them even taking notice. To deal with this threat, new mandatory serving glass sizes have been issued at a volume of 125ml. Going forwards, all pubs will be obliged to offer customers the option of the 125ml alongside larger glass sizes[46].

Healthy drinking

Binge drinking aside, as consumers become increasingly health conscious and aware of the impact of their diets to their well-being, this affects their alcohol and wine choices. In the UK there is constant media coverage on related issues such as diet, healthy eating, obesity and excessive drinking; as a result, about 25% of people claim to be moderating their alcohol intake because they are conscious of its impact on their health.

Reducing alcohol consumption in these terms is proving a challenge, as alcohol calories remain invisible compared to food calories. In addition, alcohol has a strong element of social pressure to it, making it harder to moderate.

With wine, efforts to promote low alcohol products has met resistance, due to perceptions regarding quality. Still, what has been a small niche demand for low-alcohol wines is now showing signs of growth and should not be ignored; M&S has already said it would be looking to introduce more low-alcohol wines in its range and

[46] **http://www.dailymail.co.uk/health/article-1164815/Pubs-offer-smaller-glasses-wine-cut-drinking-says-Government.html**

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others are expected to follow. Ideally the focus should fall not on the negative effects of excessive drinking but on the positive effects of moderate, regular wine drinking.

The demand for healthier drinking drives innovation not only towards low-alcohol wines but to other directions as well. One of these is the 25cl bottle, directed not only towards the single consumer but to those who want to indulge in a wine treat without being forced to drink a whole bottle.

Finally, despite wine being the healthiest alcoholic option available, UK consumers are failing to see the maximum benefit of this. Government research indicates that wine drinkers exceed moderate drinking recommendations more than consumers of other alcoholic drinks do. Reports show that middle class wine drinkers are at most risk, with 7m exceeding medical recommendations and another 3m classed as problem drinkers. This issue can cripple the National Health Service if not dealt with appropriately[47].

Functional wines

A consequence of the growing perception of wine as a healthy alcoholic beverage is the potential advent of functional wines[48]. The term refers to wines with added antioxidants that could be available in the UK market by the next summer, subject to approval of the vinification process by the European Commission. The wines are already being sold on trial in Australia and contain 100mg/lt of the antioxidant substance resveratrol, which is more than the corresponding 3-6mg/lt in regular red w and 1mg/lt in regular white wines.

Ethical and environmental issues

The consumers who drink most wine, especially in the off-trade, are statistically more likely to have a higher-than-average level of ethical concerns. Albeit small in their influence with regards to wine purchasing, ethical and environmental issues are in today's agenda.

Wine drinkers have shown a growing interest both in Fairtrade and organic products, for some of which it is important to be seen as green. These consumers generally have a good understanding of the green concepts; the issue is to translate those concepts to wine.

With regards to Fairtrade, although it has seen growth and still has plenty of room to grow further, it appears to have finite limits in wine, as the product is made a set number of countries, most of which are not disadvantaged. Currently, the concept applies predominanently to wines from South America and South Africa.

47 **http://www.dailymail.co.uk/news/article-1081420/A-quarter-adults-drink-wine-drinkers-worst-watchdog-warns.html**
48 http://www.talkingdrinks.com/news/latest-news/functional-wines-set-sights-on-uk-market.html

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With regards to the organic movement interest is growing. Organic is perceived as beneficial both for the environment and the consumer. Sales are re-enforced by the halo effect of green consumers who choose everything organic, regardless of potential individual benefits. Furthermore, organic is becoming more mainstream as known wineries start getting involved. This is a niche but growing trend that cannot be ignored and is expected to become more important in the future.

Along with the organic trend, interest in bio-dynamic wines is also growing, although this is still a very niche area. The issue that still remains for organic and bio-dynamic wines is whether they taste as good as conventional wines. With other foods, organic brings flavor benefits but this is not necessary always the case with organic wine.

With regards to environmental issues, the carbon footprint of wine producing and transporting is a very hot topic already and consumers are becoming increasingly conscious of this. This gives birth to alternative packaging (screw caps, cans, tetrapak and glass of reduced thickness and weight). Enhancing «green» credentials is on the agenda not only for wine producers but for retailers as well, which further re-enforces the trend.

Demand for English wine

What once seemed an impossibility, today is a reality. Despite the practically negligible volume of production, English wine is finding it hard to keep up with demand which, according to Waitrose, is growing by 120% per annum[49]. Climate change has benefited the industry which is now seen at its birth stage and is expected to grow at a steady pace: England makes about 3m bottles a year and winegrowers expect this figure to quadruple over the next few years.

The shift in environmental conditions and the massive potential for growth is proving attractive to foreign investors. French companies in particular are expected to expand their operations on British soil, a prospect that they have been contemplating on for a number of years.

Consumer groups and purchase behavior

Wine consumption has a penetration of almost 70%, while more than 50% of consumers drink more than 1-2 bottles a month[50].

Lighter users consume more in-house, medium users about the same both overall and in-house and heavy users consume less in-house than they do overall

[49] **Reuters:** Sparkling future ahead for English wine – 29.01.08
[50] Mintel

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Trends in bottled wine and in-home bottled wine consumption	2002 (%)	2006 (%)	point of change 2002-2006 (%)
Drinking of bottled wine (total)			
Drunk in last 12 months	66.8	66.5	-0.3
Heavy users	26.9	28.3	+1.4
Medium users	24.9	24.2	-0.7
Light users	13.5	12.9	-0.6
In home drinking of bottled wine			
Heavy users	22.3	23.5	+1.2
Medium users	22.9	22.4	-0.5
Light users	16.9	16.1	-

Source: *Mintel, Wine Retailing UK, June 2007*

Demographics vs. wine consumption

More than 50% of consumers have drank at least one bottle wine within the last month. Certain demographics on the basis of gender and age but also social classification (ACORN) and lifestage heavily influence wine consumption in the UK. Not surprisingly, wine consumption both in-home and outside increases with age and socio-economic status, while women seem to be a key demographic also in the older age groups.

Consumers at Family and Third Age lifestages tend to consume more wine than Pre/No-family and Retired lifestages. The Pre/No-family lifestage and the ABC1 classification within it in particular buys more in the 2-4bottles/month category.

Key demographics

Women across lifestages

Wine drinking is more popular among women than men, as 7 out of 10 women consume wine regularly, opposed to only 6 out of 10 men. Women drive also in-house wine consumption (65% vs. less than 58% for men), and dominate both medium- and light-user categories[51]. In the heavy-user category, men and women segments are at equilibrium.

Furthermore, women in the UK are much more influential as wine buyers since they are responsible for 8 out of every 10 bottles bought for home-consumption[52], according to a research titled Women and Wine, commissioned as part of a regular

[51] Heavy users: 3 or more bottles in the past month, Medium users: 1-2 bottles in the last month, Light users: less than 1 bottle in the last month
[52] http://www.guardian.co.uk/lifeandstyle/2009/apr/02/wine-sales-women

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annual survey by Vinexpo, conducted in 2009 in France, Germany, the UK, Japan and the US.

The same survey reveals that 60% of women in Britain prefer red wine to white or rosé; Moreover, a third of women who enjoy wine as a treat at the end of the day admit that they prefer to drink it alone - in the bath.

Higher socio-economic status segments

Regardless of the increase in value through heavy discounting and lower prices, wine remains more popular amongst the more affluent consumers. Overall, the higher the ACORN classification, the higher the wine preference.

More than 80% of ABs and 71% of C1s are regular wine drinkers, while 45% and 31% belong to the heavy-user category respectively. Additionally, over a quarter of ABs buy more than ten bottles a month, while C1s are also frequent wine buyers demonstrating an increasing interest.

A strong link also exists between affluent consumers, upmarket and online retailers and heavy wine consumption.

Baby boomers

Regarding consumption volumes, the dominant age groups are 35-64, and within this broad range the 45-54 age group, across both overall and in-house wine consumption. Age groups from 25-34 and older carry more weighting in the heavy user group than in the medium and light user groups. In relation to the previous point, this trend is even more evident among the affluent population.

Penetration of bottled wine drinking and in-home drinking by age, 2006	15-19 (%)	20-24 (%)	25-34 (%)	35-44 (%)	45-54 (%)	55-64 (%)	65+ (%)
Drinking of bottled wine (total)	38.5	50.6	65.4	71.2	73.2	72.1	65.1
Heavy users	11.7	16.1	29.2	33.7	36.1	32	21.7
Medium users	19.8	19.3	23.3	24.6	23.5	26	26.3
Light users	6.3	14	12.1	12.2	12.7	13.2	15.2
In home drinking of bottled wine	32.7	46	61.8	68	69.3	67.4	58.7
Heavy users	6.3	11.8	22.6	28.2	30.8	27.7	18.6
Medium users	15.6	16.9	24.3	24.2	22.7	23.1	22.2
Light users	10.9	17.4	14.9	15.6	15.8	16.6	17.8

Source: *Mintel, Wine Retailing UK, June 2007*

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Purchase behaviour

This section elaborates on the main factors with regards to the UK market that affect consumer buying behaviour.

Main factors influencing the consumer buying process

The results of a study conducted by Vinitrac[53] in the UK among regular wine drinkers in 2007 clearly pinpoint the relative weightings of choice queues in the consumer's selection process:

% "important or very important"	UK
Grape variety	79%
Promotional offer	65%
Recommendation by friend or family	63%
Country of origin	60%
Region of origin	57%
A brand I am aware of	54%
Alcohol content	33%
Recommendations by shop staff	29%
Appeal of the bottle or label design	26%
Medal or award	21%

Source: *Vinitrak*

Lack of wine knowledge, as highlighted in previous section, leads consumers to seek ways of minimizing perceived risk associated with the wine purchase. Consequently, factors that can help deal with uncertaintly, such as the grape varietal, recommendations by friends and family, country and region of origin and brand awareness play an important role in the buying process.

Price, in the context of discounting and offers, is a major consideration and will be discussed in detail later on.

The role of the brand

The advent of strong wine brands in the UK has greatly simplified the process of wine selection for the majority of consumers, especially the less affluent and those in lower social classifications. The British consumer relies heavily on brands (30% prefers to buy known brands) which remove a lot of the risk associated with wine purchases, thus contributing to making wine an everyday drink.

[53] Vinitrac® USA December 2007; Base = US regular wine drinkers, n = 2,015; Vinitrac® UK January 2008; Base = UK regular wine drinkers; n = 1,009

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Wine brands emerged with the New World and in particular with Australian wine, going against the Old World paradigm of complicated regions, denominations and vintages which had made wine an elitist drink. Today, the UK market uses brands more than any other factor.

Moving forwards however, as consumers develop a wine culture and build their knowledge, the need for new, diverse, unusual wines grows. For the mainstream that is happy with the (very good) quality that current mid-price brands offer, this will make little difference; Still, the need for more premium brands that will cater for those who want to spend more and experience different, yet they continue to require safety, is becoming apparent.

Most popular brands will find it difficult to upgrade their price levels with existing or even new wines, as a label that can be found on any wine does not carry premium weight in the minds of consumers.

By allowing consumers to make safe wine choices, brands now stand in the way of moving towards more complex and interesting products. With the use of brands, a large segment has been able to enjoy wine yet avoid to learn about regions, varieties, vintages and terroirs which is essential knowledge for making more premium choices, thus preventing them from trading up and exploring more.

Lack of wine knowledge and the role of price and discounting

In the very competitive UK market, the general rule is that consumers are happy with the quality of wine at lower price segments. The role of brands as seen in the previous pragraph, lack of consumer education and an inherently complex product contribute to this. Interestingly enough, despite the fact that wine has become more popular within the last decade, UK consumers do not seem to have advanced their knowledge and understanding of the product any further. According to a recent survey by Wine Intelligence, only 4% of the 19million wine drinkers who drink two to three times a month at home can be categorised under the «expert» category. Consequently, as the larger segment of the public cannot appreciate the differences and the benefits associated with higher quality and expensive wines, it finds it difficult to accept paying a premium for them.

On the other hand, retail discounting has further reinforced this and consumers have been keeping the average price artificially low by always choosing discounted wine at the price point of their preference. In other words, instead of using discounts to upgrade to more expensive wines, they stay to their normal price tiers and only 10% of consumers that enjoyed a more expensive wine will upgrade when the promotion is over.

The £3.99 (€4.57) price point is considered the norm for everyday wine, with most consumers preffering to pay less than £5.00 (€5.70) for a bottle of wine. Brands may have established themselves through pricing and discounting, it is the same practises however that have erroded brand loyalty, as consumers now buy on a deal. Overall,

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price is seen as an indicator of quality and people will choose to pay a little more if it is a special occasion or social event.

Low prices and heavy discounts has beyond doubt driven sales volume up, but has also left the industry with very tight margins. This puts more strain on wine producers and is an obstacle in producing and marketing more premium, smaller volume wines. On a more positive note, according to TGI survey in 2006, almost 37% of adults are «prepared to pay more for good quality wine», while another 24% would not disagree with such a statement.

Awards & Recommendations

As consumers are largely uneducated and price is their first benchmark when choosing wine, awards are used to reinforce their decision making, constituting awarded wines as safe choices. The same stands true for journalist's reviews. Awards and press recommendations add credibility to brands' claims and help consumer make sense of a market that is very diverse and (to many) still confusing.

Choosing retail channels

According to research, the more upmarket the retailer the more likely their customers are to buy larger quantities of wine. High-end food retailers, such as M&S and Waitrose, and the internet are prefered by affluent (ABs) as well as older (55-64 year old) consumers.

Moreover, Broadband and internet users are heavy purchasers of wine. Inversely, direct channels are ideal for volume buyers with dominating shares among those who buy more than 5 bottles of wine per month.

The majority of consumers use more than 1 source/shop for buying wine, with using 2 sources/shops the prevailing trend (57%). This indicates that secondary sources are important to wine buyers, especially for unplanned purchases, while there is also a relatively high degree of loyalty for some stores.

Spending by occasion

Despite the discount culture, research indicates that consumers are steadily increasing the amount they are willing to pay for a bottle of wine. Currently, for normal drinking occasions, the £4.00- £4.99 bracket attracts the greatest share of consumers (21.6%).

For more special occasions, there is a noticeable shift in price ranges preferred by consumers. Today, 12.6% of consumers choose wines in the range of £5.00-£6.99 and 11.6% choose wine in the £7.00-£8.99 range. It must also be noted that 11.9% of consumers buy wines that cost £9 and above for special occasions.

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Germany

Germany is a key market for the global wine industry, boasting some very impressive figures:

- Germany represents 13.3% of Europe's total wine market by value, ranking third behind France (19.4%) and Italy (22%)[54]
- Germany is the world's largest market for imported SLW by volume, with a share of 22.4% in 2006, the equivalent of 137,300 '0009L cases[55]
- Germany is also one of the world's largest SLW consumers with a share of 10.4% in 2006, the equivalent of 245,460 '0009L cases, ranking 4th behind the US (11.2%), Italy and France (12.7% respectively). This is 90% more volume when compared to the UK market[56]
- With regards to white SLW, Germany is the world's largest consumer by volume

Germany is a very challenging market for any international (or even domestic) player to establish itself, gain its place and even compete profitably. Even though Germany has traditionally been an extremely price-sensitive, low budget-oriented wine market, there has been a recent shift towards quality. According to recent data (discussed further hereafter), still light wine consumption by value has been increasing and is expected to rise further up to 9% or even 11% (depending on source) to 2012. This shift, which in fact is aligned with the global premiumisation trend, provides further added value to Germany's imported wine market.

All relevant aspects of the German market have been analysed and are presented in the sections that follow.

[54] Datamonitor, Wine in the United Kingdom industry profile, November 2007
[55] IWSR Wine Handbook, 2007
[56] IWSR Wine Handbook, 2007

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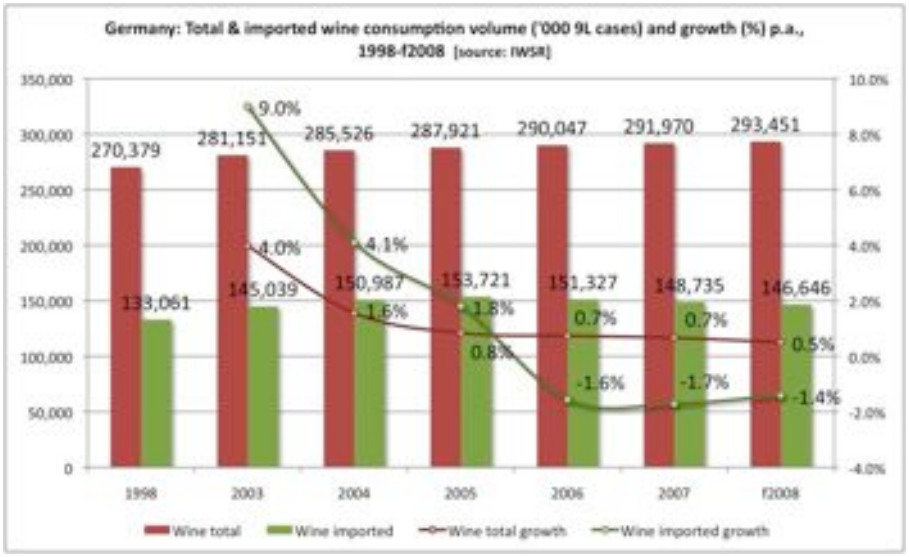
Market profile

Market size

The German total wine market[57] reached a total size of 291,970 '0009L cases in 2007 and is forecasted to further increase this by 0.5% to 293,451 '0009L cases in 2008, as shown in the graph below:



Source: Based on data provided by *IWSR, Germany Index, June 2008*

The German market is large in size and has reached a maturity stage, which explains the deceleration in total wine volume growth since 2004.

Imported wine

Total imported wine consumption[58] by volume follows similar maturity trends as the overal wine consumption, albeit faced with stronger decreases in the past years. In 2007 volume droped by -1.7% compared to the previous year to 148,735 '0009L cases, and is forecasted to drop further in 2008 by another -1.4% to 146,646 '0009L cases. The steep decline in growth from 9% in 2003 to 1.8% in 2005 was succeeded by negative growth over the period 2006-f2008. The decrease appears to be decelerating but the effect of the global economic crisis remains to be seen.

[57] The wine market includes consumption across the (i) Still Light Wines, (ii) Sparkling Wine (iii) Fortified wine, (iv) Light Aperitifs and (v) Other wine categories
[58] Imported wine consumption across all wine categories, as defined in the Market Size section earlier

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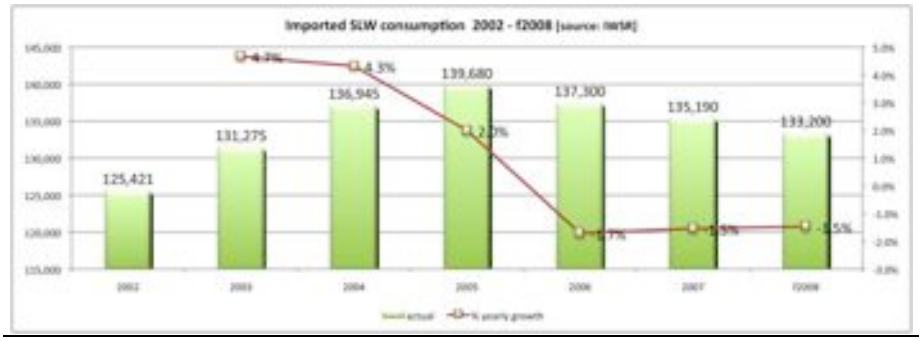
Still Light Wine

SLW represent 84.8% of all wine and 90.9% of imported wine consumption in Germany. For imported SLW, the graph below shows volume and growth evolution:

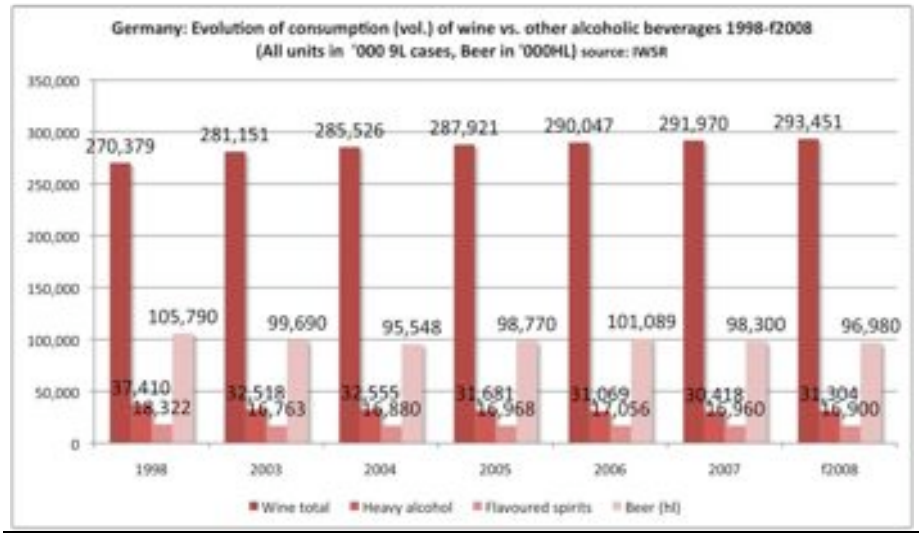


Source: Based on data provided by *IWSR, Germany Index, June 2008*

Evolution here follows the pattern of imported wines, with a move from 4.7% growth in 2003 to steady annual –yet marginal- decline in 2006 and onwards at a level around -1.5%. Imported SLW volume peaked in 2005, an 11.4% gain on 2002 performance, this however is predicted to drop down to 6.2% in 2008.

Wine consumption evolution vs. Consumption of other alcoholic beverages

The following chart shows evolution of consumption volume for key alchoholic beverages in Germany[59]:



Source: Based on data provided by *IWSR, Germany Index, June 2008*

[59] Wine includes all wine (domestic and imported); Heavy alcohol includes whisky, white spirits, rum and brandy; Flavoured spirits include liqeurs, bitters, spirit aperitifs, aniseed and fruit aux de vie.

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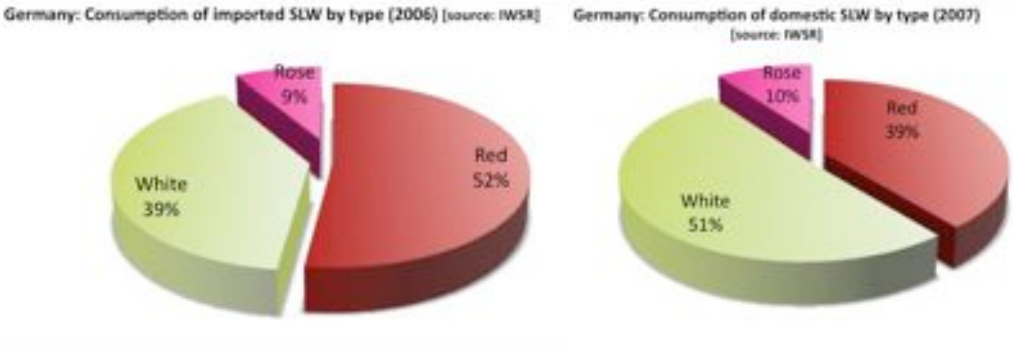
Heavy alcohol consumption by volume has seen a decline from 1998 levels of 37,410 '0009L cases to 31,681 '0009L cases in 2005, the equivalent of a -15.3% drop. This seems to have rationalised the heavy alcohol market and has remained relatively stable since. Flavoured spirits are forecasted a 7.8% decline in 2008 compared to 1998, which occured in the 1998-2003 interval; Perfromance here has been relatively stable since.

The key observation is the significant 9.7% decline in beer consumption in 2004 from 1998. The beer market attempted to recover losses and spiked in 2006, minimising lost volume to 4.4% compared to 1998 levels, but the decline continued in the following year and is forecasted to do so in 2008 as well. Wine consumption on the other hand has been increasing, as previously analysed. The trend of switching from beer to wine will be further examined in this report.

Red vs. White consumption

Given the fact that Germany mainly produces white quality wines which enjoy great popularity among domestic consumers, when it comes to imported wines, german wine lovers mostly opt for reds. Imported white wines account for less than 40%, while rosés almost for 10%.



Source: Based on data provided by *IWSR, Germany Index, June 2008*

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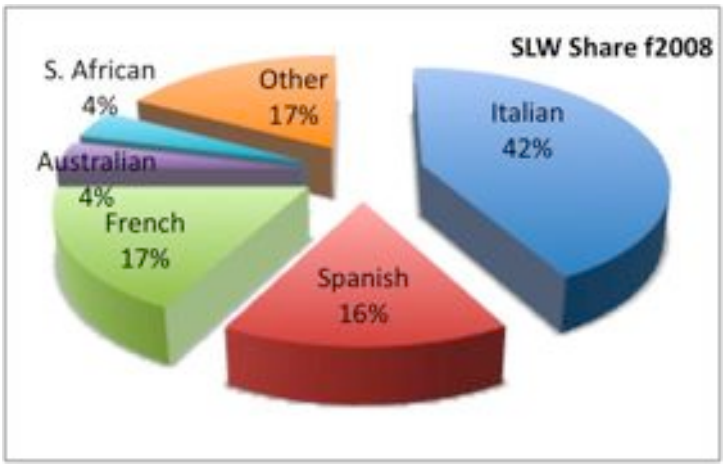
Consumption per country of origin

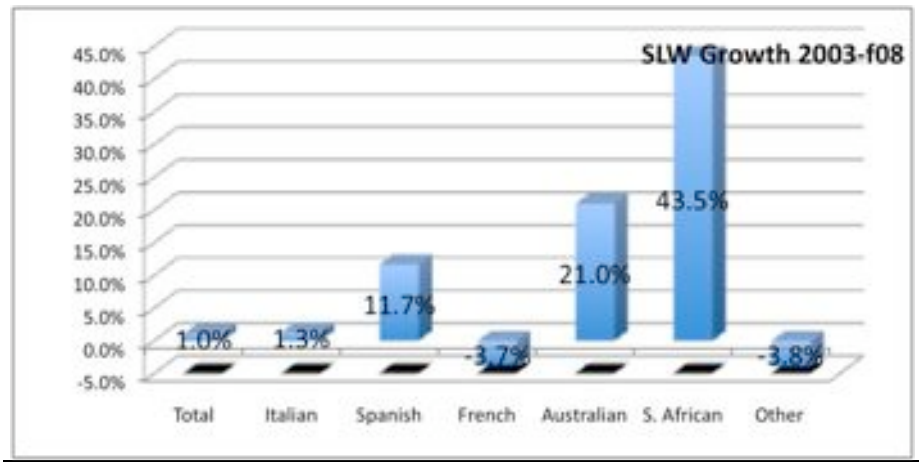
Market role analysis[60]

Italian wines are the leaders in the imported SLW category with a 42% share, a bigger share than the total of its four main competitors:



Source: Based on data provided by *IWSR, Germany Index, June 2008*

Spanish and French wines are followers and close rivals for second place. Australian and South African wines have niche positions in the market.



Source: Based on data provided by *IWSR, Germany Index, June 2008*

[60] - 2002-2006 data taken from IWSR Global Wine Handbook 2008.
- 2007 - f2008 data and all South Africa data taken from IWSR Germany INDEX report 2008
- South Africa data for 2002 were not available. 1998 data are used.

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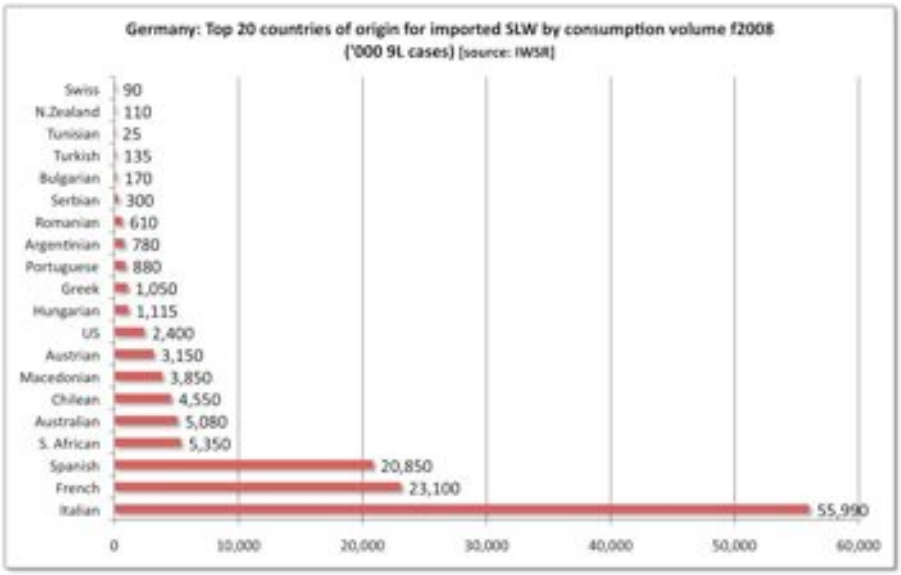
Observing the growth rates of the main competitors in the following graphs, Spanish wines appear to be gaining share over French and other wines. Italian wines are well established in their leadership position and Australia and South Africa, despite their small shares are seeing strong growth that may allow them to outgrow their niche.

The rest of the competition

With regards to imports, the German wine market is much more consolidated than other major world markets, such as the UK, focusing primarily on a small set of countries of origin, as seen in the graph below:



Source: Based on data provided by *IWSR, Germany Index, June 2008*

Italy, France and Spain make for 75% of the market's volume. Following them is a set of niche players ranging in size from 2,400 '0009L cases (US) to 5,350 '0009L cases (S. Africa) and subsequently, a second set of small players with minimal impact in the market. Chile was in 5th position in this ranking until 2007 but 2008 forecasts indicate a slip in performance in comparison to Australia and South Africa.

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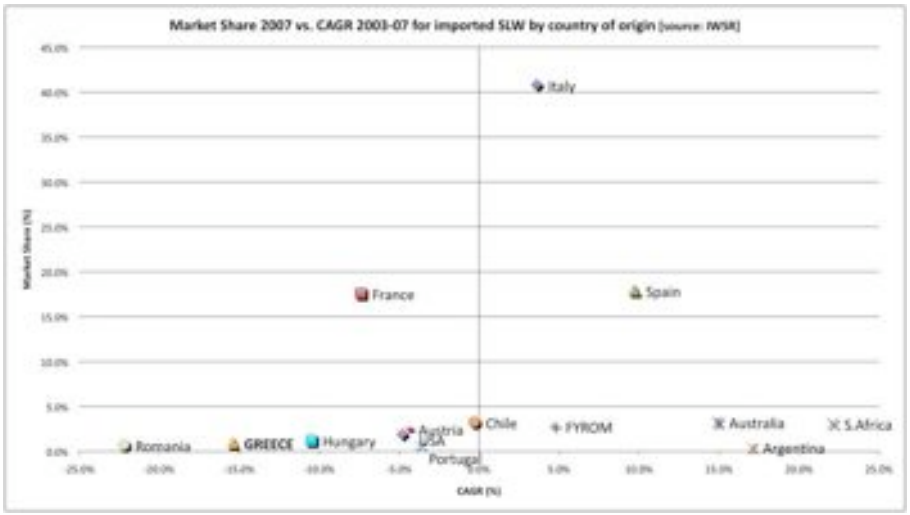
The following plot diagram paints a clear picture of the international competition in the German market in terms of size and growth[61]:



Source: Based on data provided by *IWSR, Germany Index, June 2008*

Noticeably, France is the only major player in the market which is in decline. This illustrates France's general lack of strategic direction and inability to deal with the rise of the New World. The S.Africa – Argentina – Australia cluster of New World nice players is growing at bold rates. Finally, New Zealand is not included in this chart due to its small volume (110 '0009L cases forecasted for 2008, approximately 14% smaller than Argentina's volume in the German market), it has been growing however with a CAGR of 37.7% over the 2003-2007 period and is expected to increase its performance in the following years.

[61] Growth here is measured as the Compound Average Growth Rate (CAGR): CAGR is the geometric mean growth rate on an annualized basis and it represents the smoothed annualized gain/loss achieved over the entire period in question. CAGR dampens the effect of volatility of periodic gains/losses that can render arithmetic means irrelevant, and is calculated by the formula:

$$\mathrm{CAGR}(t_0, t_n) = \left(\frac{V(t_n)}{V(t_0)}\right)^{\frac{1}{t_n - t_0}} - 1$$

where V(t0) : start value, V(tn) : finish value, tn – t0 : number of years.

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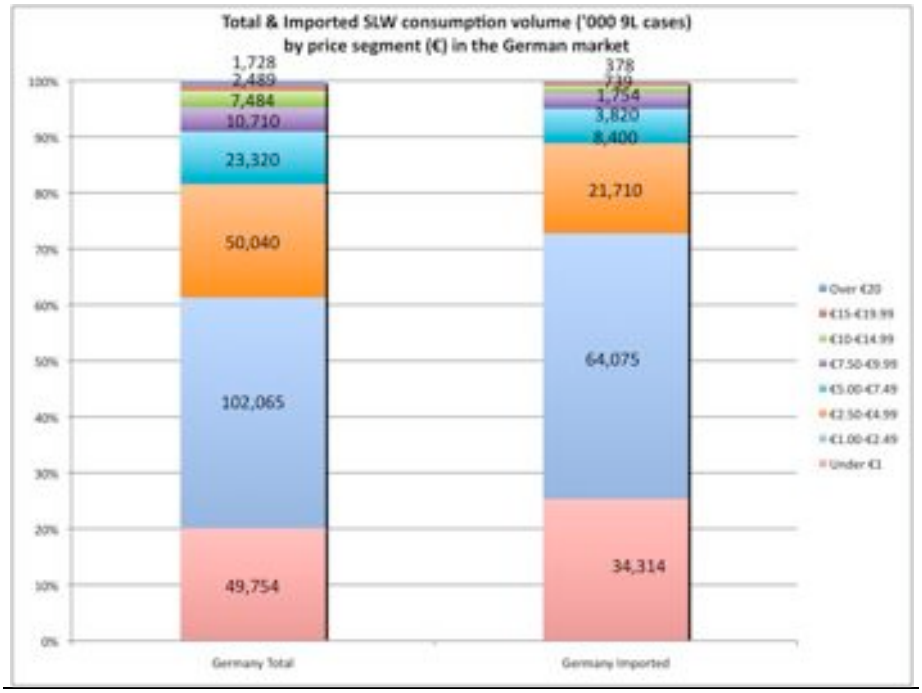
Consumption per price segment

The following graph shows consumption volume per retail price segment[62] in the German market, both for total and imported wines:



Source: Based on data provided by *IWSR, Germany Index, June 2008*

A key observation here is the large share of the Under €1 segment, which reaches 20% of total wine consumption volume and 25% of the imported volume. This is a unique phenomenon amongst the 3 countries of reference selected for this study, as the US and UK have 0 volumes in this price segment.

The cummulative share of the Over €5 segments for total wine reaches 20% and is approximately 8%-10% larger than the equivalent for imported wine. This is a clear indication that Germany is not only a «cheap» market for wine but that this holds especially true for imported wines, which are sold in lower prices compared to domestic wines.

The higher price segments do however trade some volume, reflecting the trend of the more affluent consumers to engage in gourmet shopping, as it will be discussed further in this report.

[62] Prices are retail shelf prices based on retail audits conducted in leading supermarkets

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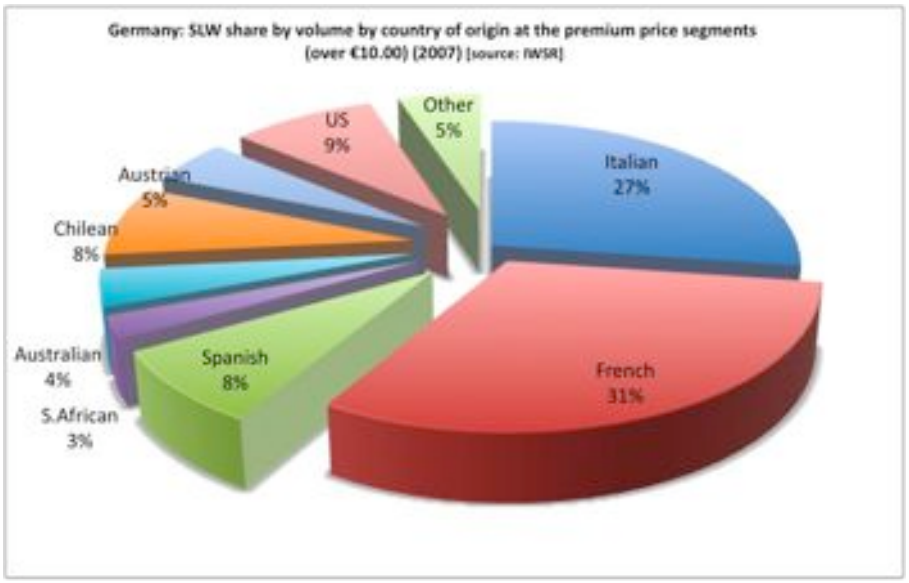
Major brands in each price segment

Country level

Despite its «follower» role in the market and the negative growth for the past years, at the premium price segments (€10.00 and higher), France is the indisputable leader, as the following chart reveals:



Source: Based on data provided by *IWSR, Germany Index, June 2008*

Italy comes second, challenging France's position. Chilean wines have managed to have a strong presence in these price segments with an 8% share, which is an impressive figure considering it wasn't but a few years ago that Chile had a major issue with raising the prices of its seriously undervalued wines.

Brand level

With regards to the popular price segments (€1.00-€9.499) which represent approximately 75% of sales volume, the biggest brands are shown in the table that follows:

Country of Origin	Brand	Distributor	Quantity 2007 ('000 9Lt Cases)	Indicative Price (€, Jun2008)
German	Domkellerstolz	Peter Mertes	3,100.00	
German	Moselland Still Wine	Moselland	1,950.00	3.99-5.69
US	Gallo Still Wine	E&J Gallo Deutschland	1,500.00	4.99-6.29
German	Langguth Erben Still	Langguth Wein &	1,165.00	

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	Wine	Spirituosen		
German	Deutsches Weintor German Still Wine	Deutsches Weintor	1,050.00	2.99-3.99
French	Blanchet Still Wine	Racke	1,000.00	2.99
French	Medinet	Langguth Wein & Spirituosen	710.00	2.89 (1L)
Spanish	Amselkeller Still Wine	Grands Chais de France	570.00	1.99
French	Chenet	Grands Chais de France	565.00	2.99
French	Le Filou	Binderer St. Ursula	525.00	2.49
Chilean	Aldi Chilean Wine	Aldi	480.00	
Greek	Tsantali Greek Wine	Borco & Others	475.00	2.99
Spanish	Mederano	Freixenet	375.00	3.99
Italian	Viala Still Wine	Racke	358.00	2.99
German	Rottkapchen German Still Wine	Rottkapchen-Mumm	335.00	
German	Kendermann Still Wine	Kendermann	335.00	
German	Himmlisches Tropfchen Wine	Langguth Wein & Spirituosen	330.00	1.99
Chilean	El Emperador	Grands Chais de France	315.00	1.99
South African	KWV Still Wine	Eggers & Franke	305.00	4.99-6.79
Hungarian	Graf Karolyi	Binderer St. Ursula	300.00	2.99
Greek	Boutari Still Wine	Mack & Schuhle	250.00	3.99-4.79
French	Baron Philippe Wine	Eggers & Franke	240.00	
Chilean	Concha y Toro Range	Bernard Massard	230.00	4.99-6.99
Italian	Lamberti	Racke	225.00	3.99
French	Bongeronde	Racke	213.00	2.99
Chilean	Baron de Pilar	Peter Mertes	200.00	

Source: Based on data provided by *IWSR, Germany Index, June 2008*

An important observation is the significance of the €1.99 and €2.99 price points which apply to a large number of the top brands in the market. These prices are considered low, especially when compared to the prices of the UK market. It is also important to note that the majority of domestic wines is not branded, while imports tend to be branded and often strongly advertised.

Appendix A provides top-line brand analysis profiles for the top selling producer brands (in the US, UK and German markets) segmented by country of origin. Each

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brand analysis form features brand name, signature, tagline and basic imagery for each of the wineries as well as their corresponding flagship product brands.

Market structure

Distribution system and major players

Germany's distribution system is complex. The country is divided to 16 autonomous administrative regions called Länders. The market for imported wine is heavily fragmented with over 600 buyers and a number of different distribution patterns:

- National distributors serve supermarkets, hypermarkets and hard discounters. They also serve traditional retail stores and chains
- Regional wholesalers serve traditional retail stores and chains as well as specialist retailers
- Regional wholesalers which operate across a number of Länders serve Supermarkets for regional products and the traditional retailers
- Cellars serve directly specialist stores and restaurants

Wine brokers' share in the wine trade has been also on the rise lately, with players such as GES Sorrentino, Smart Wines and Stoppervini. Those are wine dealers operating on exclusive agreements and fixed fees (no commission on sales) and at reduced financial risk, as they bear no logistics function, while providing economic value to their clients since their wine portfolio is sold at ex cellar prices.

Germany's main distributors and respective key brands are:

WIV	WIV Wein International (www.wiv-ag.com) Considered as the world's leading direct sales wine company, with direct sales contributing about 64% of the company's revenues, WIV also sells wine in wholesale and even retail, through its dedicated Vino24 chain (**http://www.vino24.de/**). WIV focuses on exclusive wines from top wine producers around the world.

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	Hawesko Holding (**www.hawesko.com**) Hawesko operates in wholesale with "CWD Champagner und Wein Distributionsgesellschaft", in mail order and e-commerce with "Hanseatisches Wein- und Sekt-Kontor" and in specialist shops with "Jacque's Wein-Depot". Hawesko is considered Germany's largest integrated merchant of premium wines and champagnes.
	Mack& Schule (www.weinwelt.de) Weinwelt imports wine from Old and New World countries and distributes to wine specialists wholesalers and retailers serving the German market.
	Schenk GMBH (www.schenk-weine.de) One of the leading wine distributors in Europe. The company's German branch Schenk GmbH, Baden-Baden, focuses on the marketing of foreign wines in the off-trade and to gastronomy specialists in the on-trade.
	Tophi Warenhandelsges (www.infowein.de) Focused in conducting all its businesses in the form of partnerships, Tophi distributes wine from suppliers and wineries that the company's buying team has visited and knows well. Tophi aims at providing consistent quality for price and reliability to its clients.
	Global Wines GMBH (**www.globalwines.de**) Operating in Germany and Central Europe, Global Wines supplies off-trade clients and some of Europe's leading retail chains with wines from around the world and a small selection of other alcoholic drinks as well.
	Schlumberger Gmbh (www.schlumberger-onwine.de) Schlumberg focuses on high-quality wines and spirits and distributes to on-trade customers and department stores. The company's broad portfolio includes wines and spirits from around the world.
	Rolf Herzberger Gmbh (www.herzberger.de)

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Bernard Massard	Bernard Massard Sektkekkerei (**www.bernard-massard.de/**) The company imports and distributes famous wines from the Old and New World. Some of its most famous brands are Concha Y Toro (Chile), Wente (California) and Barramundi (Australia). Bernard Massard also produces a range of sparkling wines.
EGGERS & FRANKE	Eggers & Franke GMBH (**www.egfra.de**) Traditional importer, distributor on a national scale and a marketing partner to its clients, with a portfolio of high-quality, international wines and spirits.
RACKE	Racke Racke is an importer and distributor of premium wines, serving every distribution channel. In addition, Racke has formed joint ventures with premium wine producers from New World countries, such as Chile and South Africa. The company focuses on importing and marketing unique and authentic wines, such as the Golden Kaan and Espiritu de Chile. Racke also makes its own wine in its Donum Estate winery in California.
GCF	Grands Chais de France (**www.gcfplanet.com**) French wine exporter with operations across Europe. GCF represents almost all French wine regions and exports 29% of its volume to Western Europe, 31% to Central Europe and 10% overseas, with its remaining volume distributed in France.

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Retail channels

The German wine market trades most of the overwhelming majority of its volume through the off-trade channels. As the following graphs reveal however, the on-trade makes a much more significant contribution to the market's sales value than the off-trade:

Source: Based on data from *Macrom, Wines of Greece: Market & Competitive Analysis Germany 2008*

The above figures indicate that although in-home consumption plays a major role in driving volume, it is not a value-generating consumption occasion. From the three focus countries-markets for wine, Germany offers the lowest off-trade retail prices, as identified in the Comparative analysis section of this study.

The off-trade

The off-trade market, representing 89% of wine consumption volume in Germany, is largely dominated by the Supermarkets, hypermarkets and hard-discounters, which collectively hold over 70% of the off-trade sales in terms of volume and more than 50% in terms of value[63].

The following graphs show the structure of the off-trade channel by retail outlet type:

Source: Based on data from (i) *Macrom, Wines of Greece: Market & Competitive Analysis Germany 2008,* (ii) *IWSR, Germany Index, June 2008*, (iii) *Geisenheim Research Institute (D. Hoffmann), The German Wine Market – Structure and Trends* and (iv) *UbiFrance, Le marche des vins en Allemagne, May 2008*. Data may fluctuate according to source.

[63] Source: Deutsches Wein Institut, 2007

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Hard discounters in particular (Aldi excluded), are seeing significant growth of 10.5% in total volume in 2007. Additionally, their >€3 price tier is seeing an even higher increase of 17.7% by volume.

More specifically with regards to price, hard discounters trade mostly in the €0.99 - €3.49 range (predominatly wine in larger pack sizes), supermarkets in the €2.39 - €5.99 range (predominantly bottled wine) and specialists in the €3.49 - €12.00 range, also offering wines from independent wine makers:

Source: Based on data from *UbiFrance, Le marche des vins en Allemagne, May 2008*

Wine specialist shops[64] have taken a severe hit in 2008, as german consumers purchased 14% less wine in dedicated shops in the first six months of 2008 than in the same period of the previous year. As the corresponding drop in value was only 7.3% less on those wines, the average bottle price rose slightly. In general, specialist shops seem to be resisting sales slow-down due to consumer preference during festive seasons (esp. Christmas).

On the contrary, supermarkets and hypermarkets suffer from the stuck-in-the-middle position.

Direct sales

Direct sales, i.e. on-site sales directly from suppliers and wine producers play an increased role in the market with an estimated 17% share on volume and 23% share on value. It is expected that a significant portion of direct sales comes from tourism. This has been especially important in Germany's approach of the Dutch market[65].

[64] according to recent statistics released by the consumer tracking services of the GfK in Nürnberg
[65] http://www.germanwineusa.com/news/news/20060301_german_exports.php

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The presence of strong direct sales attests to a highly advanced, customer-focused German wine industry.

Internet sales & mail order

Internet sales and mail order currently accounts for just 1% of the off-trade volume. With the obvious advantages of (i) availability of information / reviews / articles etc., (ii) shopping at the convenience of your home and (iii) avoiding the transport of bulky purchases, direct sales have great potential for further growth and development. This retail channel is preodminanently directed to wine drinkers who take a heavier than average interest in the quality of wine they consume and are not too hesitant to pay more for their wine. This is reflected by the 4% share on total market sales. It must be noted that the value to volume ratio for internet and mail order is by far the highest across all off-trade retail outlet types.

Non specialist retailers

The non-specialist/grocery outlet types in the German wine market collectively account for over 70% of the market's volume. This channel is heavily geared to low pricing and as a result, it only brings about 54% of the market's value.

The following table summarizes Germany's most important non-specialised retailers:

Main non-specialist retailers	
METRO Group The Spirit of Commerce GALERIA real- METRO	Metro Gruppe (**www.metrogroup.de**) Aside to home electrics and electronics businesses (Saturna and MediaMarkt), Metro operates Real (439 supermarkets of 5,000 – 15,000 sq.m. selling space), Metro/Makro (655 self-servive wholesale stores around the world) and Kaufhol (141 department stores located in city centers across Germany and Belgium)
REWE GROUP FEGRO SELGROS PENNY MARKT	Rewe Gruppe (www.rewe-group.com) Under the Rewe Gruppe operates amongst others Penny (economy supermarket with over 2,000 branches nationwide), Rewe (3,000 supermarkets with emphasis on high-quality products), Selgros/Fergo (44 wholesale stores in Germany and 28 in other markets).
ALDI MARKT ALDI	Aldi Nord and Aldi Süd (**www.aldi.com**) Operating in Germany under Aldi Nord and Aldi Süd, the discounter aims at offering essential products at high quality and as low prices as possible. The two companies are separate entities

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	but «operate in friendship».
	Kaiser Tengelmann (**www.kaisers.de**) Food retailer focusing on offering top quality products with price being considered as a secondary factor, with 700 branches in the four regions of North Rhine, Berlin and the surrounding area.
	Lidl (**www.lidl.de**) International discounter chain with over 3,000 stores in Germany. Focuses on an essentials selection and low prices.
	Edeka (**www.edeka.de**) Supermarket group operating 4,100 stores under its brand, ranging from small corner-stores to hypermarkets and also owning other key supermarket chains, namely SPAR (717 stores, mostly small stores), Netto Marken Discount (about 1,000 stores) and Plus discount stores (2,840 stores, 30% owned by the Tengelmann group).
	Lekkerland (**www.lekkerland.com**) Supplier of confectionery, snacks, convenience ranges, ice cream, frozen foods and bakery products, fresh products, beverages, tobacco, telecommunications and prepaid products and non-food for about 67,000 service stations, shops, kiosks, tobacco shops, beverage stores, department stores, food markets, bakeries, canteens and convenience stores
	Netto (**www.netto-supermarkt.de**) Discount supermarket chain owned by the Dansk Supermarket group. Netto has about 263 stores in Germany today.
	Globus (**www.globus.de**) Hypermarket chain in Germany, offering a unique selection of local and international products, unbeatable prices and useful services (eg. For wine, pre-order and try wine before you buy)

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	Norma (**http://norma-online.de/_de_/**) International discount chain with over 1,300 outlets in Germany, France, Austria and the Czech Republic.
	Kaufland (**www.kaufland.de**) International discount hypermarket chain with over 800 stores in Germany, Chech Republic, Slovakia, Poland, Romania, Bulgaria, Croatia and Montenegro.
	Dursty (**www.dursty.de**) Chain of 200 beverage stores in the North Rhine West phalia
	Karstadt (**www.karstadt.de**) Owned by Arcandor AG, Karstadt is a chain of 91 up-market department stores and 28 sports good stores.

Specialist retailers

Specialist stores only trade 10% of the wine markets volume. Looking at the value however will give a different picture, with Specialists trading 20% and Direct Sales 27%, gaining share from Supermarkets and Discounters who focus on the lower price tiers.

In the Specialist channel, the most successful retailers are:

Major specialist retailers	
	Jacques Weindepot (**www.jacques.de**) Jacques is HAWESKO's retail company with 255 outlets and a €20m in 75cl bottle sales in 2005. Jacques offers affordable quality wines and allows customers to try-before-they-buy. Jacques also provides a return satisfaction guarantee and a loyalty card for its customers.

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	Vom Fass (**www.vomfass.com**) Has over 180 partner wine shops in Germany, Austria, Switzerland, UK, Belgium, France, Italy, Hungary, Latvia, Japan, New Zealand, and the US. The company sells products of the highest quality straight from the producers to consumers.
	Mövenpick Weinkeller (**www.moevenpick-wein.de**) Mövenpick offers a «sophisticated wine culture». The company imports directly from producers from around the world and aims at providing not only exceptional products but also exceptional, knowedgeable service. Mövenpick has 28 specialised wine shops, 15 of which are located in Germany. In addition, it also runs a direct mail operation and an internet shop.
	Korkenzieher Weinhandel (**www.korkenzieher.com**) Krkenzieher imports wines from small, unknown wineries from France, Italy, Spain but also overseas. The company sells through retail, wholesale and catering.
	Bacchus Wein der Welt (**www.bacchus.de**) The company offers an extensive international wine selection and free personal «consultation» to its customers to help them select the right wine.
	Rindchen's Weinkontor (**www.rindchen.de**) Rindchens's focuses on offering the best value for money to its customers. Its strategy is to avoid selling big and/or cult brands who invest a lot in their marketing and due to their large overheads may be

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	overpriced despite their good quality and to offer unknown wines of people who do not focus on marketing and selling their wine but on actually making them. The company runs 9 stores where customers can select wines on their own or with the help of their staff and «be surprised» by the quality and value of their unknown wines.
	Der Gallier (**www.gallier.de**) Focuses on importing wines from top vintners in Spain, Italy and France. Der Gallier operates 33 stores with an estimated annual sales of €1.1m.

Moreover, there is a current trend of local specialist retailers with particular country of origin focus, such as Wein & Vinos established in Berlin in 1990 trading solely spanish wines, while there are even narrower approaches focusing on specific winemaking regions, such as Rioja Weinspezialist. It must als be noted that there are over 4,000 independent specialist stores operating in the German market, many of which run direct imports to enrich their wine offer.

Price brackets for price-based wine categories in the off-trade

The following table presents the main classifications for bottled wine based on the product's retail price and the corresponding price brackets per bottle [66]:

Category	Price bracket
Super value wines (the most inexpensive ones)	<4.99
Basic or sup-premium wines (the next level up)	5-9.99
Premium wines (the next level up)	10-14.99
Super premium wines (the next level up)	15-29.99
Ultra premium or deluxe wines (the next level up)	30-59.99
Icon wines (most expensive, yet nor rare collectable wines)	>60

[66] Price brackets may fluctuate according to industry source

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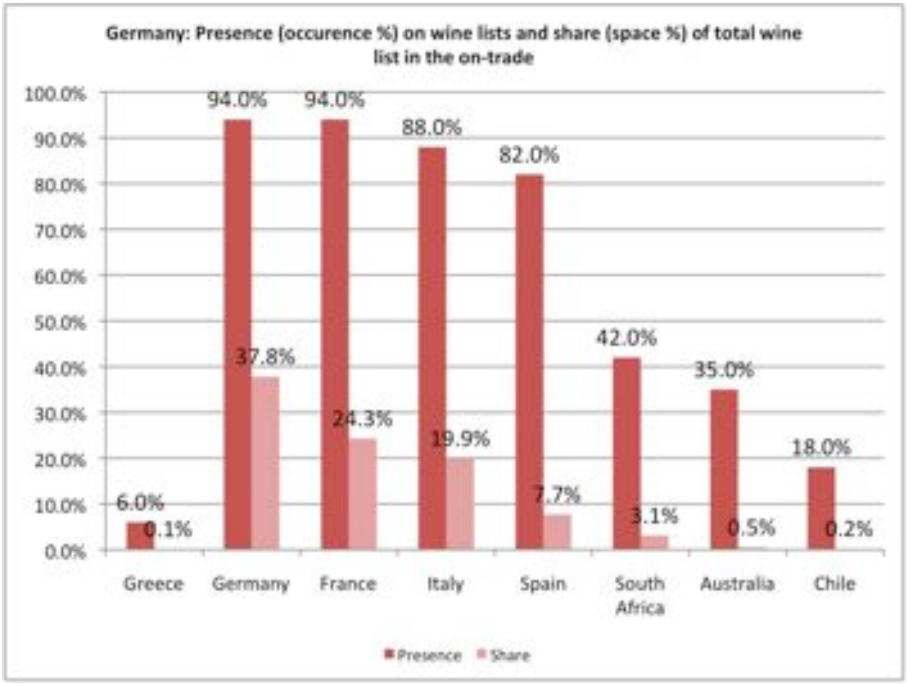
The on-trade

The on-trade accounts for the remaining 11% of wine consumption by volume in Germany.

Accoding to Macrom's recent study[67] on the performance of Greek wines in the German market, the on-trade is dominated by German, French, Italian and Spanish wines:



Source: *Macrom, Wines of Greece: Market & Competitive Analysis Germany 2008*

It must be noted that wine bars are a rarity until present, the on-trade however is believed to have good potential for future growth as German consumers discover the pleasures of drinking wine with food.

A list of the top trend-setting restaurants and bars in the urban «creative class» centres of the US is provided in Appendix C: Wine & Gastronomy Catalysts (see also corresponding paragraph in Catalysts, trends, consumer perception and behavior analysis section.)

[67] Study commissioned by HEPO

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Catalysts, trends, consumer perceptions and behavior analysis

The following section identifies catalysts and trends in the wine domain, consumer perceptions regarding wine, as well as behavioral patterns influencing purchases in the German wine market.

N.B.: Due to the fact that global sustaining and emerging trends in the wine domain are exhaustively presented and analysed within Deliverable 1.1, the present analysis briefly highlights those trends among them that are predominant for German consumers.

Wine & gastronomy catalysts

Within the scope of the present study, the opinion-leading entities in the wider wine, gastronomy and entertainment domains, which shape consumers' perceptions and behavior, were identified and profiled.

The selected catalysts are either related to the wine industry or draw wine enthusiasts or appeal to an audience that enjoys wine in general, and were selected according to their degree of influence in the German market. Thus, they include:

- Influential lifestyle, variety, well-being, gastronomy and wine media as well as those regarded as catalysts irrespective of subject – however they feature wine sections or ad hoc articles; these include print, online, social and audiovisual media
- Influential professionals such as chefs, wine experts, editors and other gastronomy celebrities have been included
- Venues such as trend-setting restaurants and bars have also been researched
- High profile industry events targeted at trade players or end-consumers, such as awards, fairs and exhibitions.

Although there cannot be a definitive rule regarding who is considered to be a catalyst, certain patterns and common features emerge from research. The significance of the creative class becomes apparent in view of the profile and locus of the identified catalysts. The creative class, a term introduced by social scientist Dr. Richard Florida, describes a group of people, that are considered to be a key driving force for economic development of post-industrial cities; it consists of scientists, engineers, managers, innovators and people in research and development, as well as artists, writers and musicians, thinkers, decision-makers, who influence cultural phenomena and impact business . Their impact not only on the evolution of the consequent creative centres but also on the further concentration of individuals that excel in their domains is evident.

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In the context of the present analysis it is apparent that wine and gastronomy catalysts identified can be traced to a large extent in the so-called creative centres, namely Berlin, Frankfurt, Munich and Hamburg for Germany. Appendix B provides the necessary background analysis for the identification and profiling of urban «creative centres» in the 3 reference country-markets.

Wine and gastronomy catalysts are presented and profiled in Appendix C in an extensive –yet not exhaustive- list. The methodology for the initial selection and finalisation of catalysts list is also presented in the Appendix. It should be noted that factors such as recognition, i.e. awards or Michelin stars, popularity, circulation and readership were primary.

Trends and consumer perceptions on wine

Even though global sustaining and emerging trends in the wine domain are exhaustively presented and analysed within Deliverable 1.1, the section hereafter aims to briefly highlight those trends among them that will mostly affect the German wine market in the near future.

Wine overtakes beer

As German wine moves away from the «Blue Nun sweet whites» era and is starting to enjoy a growing reputation for its Rieslings and white wines in key international markets, Germany's domestic market is undergoing a shift in consumer preference from beer to wine.

According to a 2008 consumer study[68] conducted by Typologie der Wünsche, more than 70% of consumers are wine drinkers, while 45% of total population drink wine at least once a month. Moreover, more than 65% are wine buyers, of which 30% buy wine at least once a month.

How often do you drink wine	%
Daily	1.8%
Many times a week	9.6%
Once a week	6.7%
Many times a month	19.5%
Once a month	7.5%
Rarely	21.3%
Never	29%

Source: *Typologie der Wünsche*

[68] Published in the german Food & Beverage in 2009; base: over than 20.000 consumers

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As more publicity is generated for wine in general and German wine in particular, the German wine market is leaping forward. Business Monitor International predicts a sales value growth of 11.3% by 2012, about half of which will originate from German wine.

Home drinking

Drinking wine at home is a prevalent trend in Germany, supported by the fact that 85% of wine sales are through the off-trade. Wine is consumed after a meal while relaxing in front of the television; this is basically why, according to industry sources, german consumers are considered to be seeking easy-going, supple, aromatic, non-complicated wines.

Wine: aperitif vs. food companion

In relation to the above point, only 20.7% of consumers seem to prefer dry wines, as opposed to more than 50% going for aperitif-like wines, such as demi-sec or even sweeter wines[69].

However, as the German consumer appreciates more the link between gastronomy and wine, wine consumption increases further. According to recent consumer research, for 66% of german consumers a glass of wine is the ideal way to accompany a meal[70]. This is further supported by the fact that almost 40 our of the 50 restaurants surveyed by Macrom, feature impressive wine lists of more than 100 labels each.

Premiumisation on the rise

Germany is recently showing elements of moving towards premiumisation (aligning with most western countries), as well as exhibiting a growing demand for foreign and luxury products. Despite having one of the least developed channels for premium products in western Europe, Germany's small gourmet market, largely untouched by multiples, is thriving. Growth in this connoiseur market is fueled by excellent gourmet and travel magazines and the travel culture of the German consumer. Today the high end food retail trade in Germany holds 2.9% of wine sales in volume[71].

This emerging trend is further supported by the increase in imported wine FOB price per lt, but also by the increase in actual wine consumption by value, according to a recent study commissioned by Vinexpo and carried out by IWSR. According to this study, wine consumption in Germany will rise by more than 6% in value to 2012, while consumption for still light wine category might rise even more up to 9%.

[69] Source: Typologie der Wünsche 2009, published in Food & Beverage
[70] Geschmack 2008, conducted by Appolinaris
[71] Macrom, 2008

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Since the overwhelming majority of all wines sold in the country today are priced for less that €3.99 per bottle (including value added taxes), and offers at less than €1 a bottle are still commonplace, the market has still a long way to go towards premiumisation (see also Purchase behavior section). However, those who are not investing on the emerging trend will be missing out on an important business opportunity.

The quest for authenticity

Growing in parallel, and nurtured through the gourmet and deli market as well, there is an increasing appreciation of local culinary products (mostly domestic but foreign as well) that convey pureness and authenticity. According to a recent research conducted by Axel Springer AG among 30.000 participants in 2008, German consumers seem to prefer being presented with a complete culinary portfolio of a certain region (hence supporting origin-specialist stores) than having to chose from only a narrow selection of products of different origins.

Interest in the country of origin is further demonstrated by the fact that 32% of german consumers consciously chose not to buy any product from certain countries, according to a commissioned study of the gastronomy sector conducted by Appolinaris in 2008.

This is also the reason why products and alcoholic drinks which are unheard of in other markets such as Grappa, Raki, Cachaca, Muscat, have found their place in Germany[72].

In regards to wine, this trend is translated in an increasing interest in the country and region of origin. This is supproted by the fact that 80% of the consumers have not consumed any of the mainstream brands during the last three months[73].

Going organic

The German consumer is well informed with regards to health issues and the organic trend in food is considerably developed. Today 15% of german consumers buy organic procuts, especially those above 60 years old. The german wine market has acknnowledged this trend and is increasingly offering more organic and bio-dynamic options to consumers. It should be noted that although only 2% of Germany's own wine production is organic, this percentage is expected to grow in the future.

[72] Source: IWSR, Germany Index, June 2008
[73] according to research conducted by Axel Springer AG and Bauer Verlagsgruppe, 2008; Basis around 30.000 consumers

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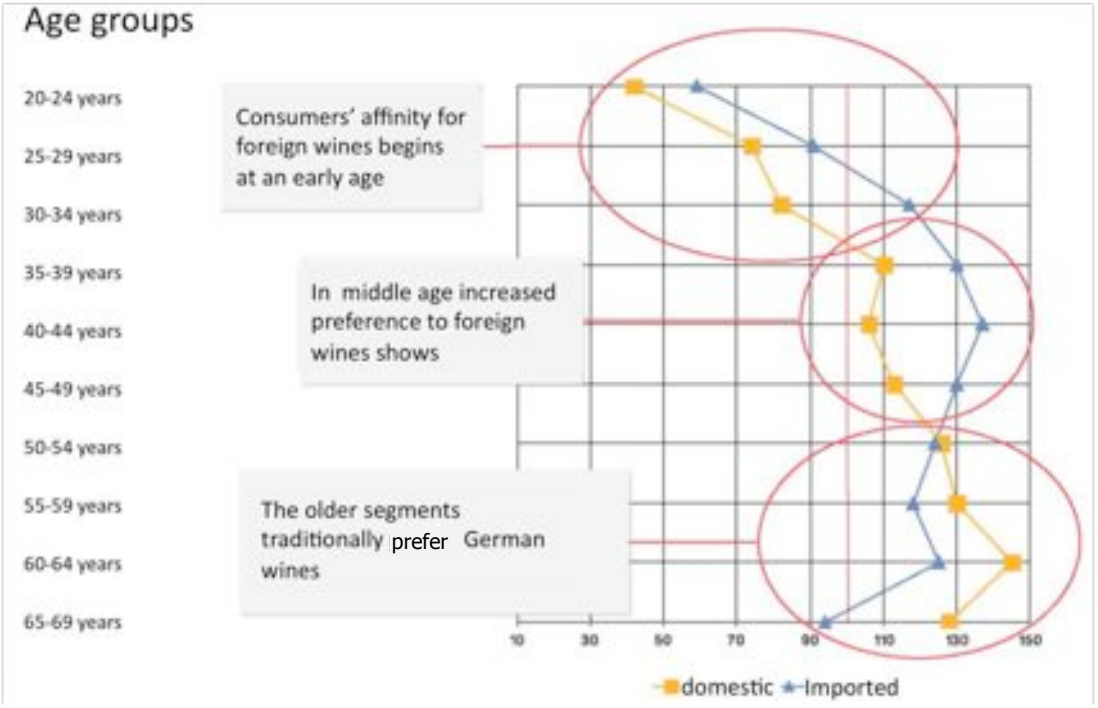
Consumer groups and purchase behavior

Demographics and wine consumption

As in the other reference country-markets, wine consumption in general increases with age and socio-economic background, indicated by education level, occupation and place of residence.

Wine consumption vs age, education and residence

Consumption of imported wine is favored vs domestic wine among younger segments between 25 and 35 years old, while it grows even more for those aged 35-50; On the other hand, Germans aged above 55 seem to experiment less and opt mostly for domestic wines.[74]



Source: *Rheinhessische Agrartage, Neue Wege im Gemeinschaftsmarketing des Deutschen Weininstituts (DWI), January 2008*

Imported wine consumption is more popular among people that work vs. pensioners and unemployed, while it is strongly preferred against domestic wine among consumers with higher education and those living in the creative centres of Hamburg, Berlin and Munich.

[74] Source: Typologie der Wünsche, 2008

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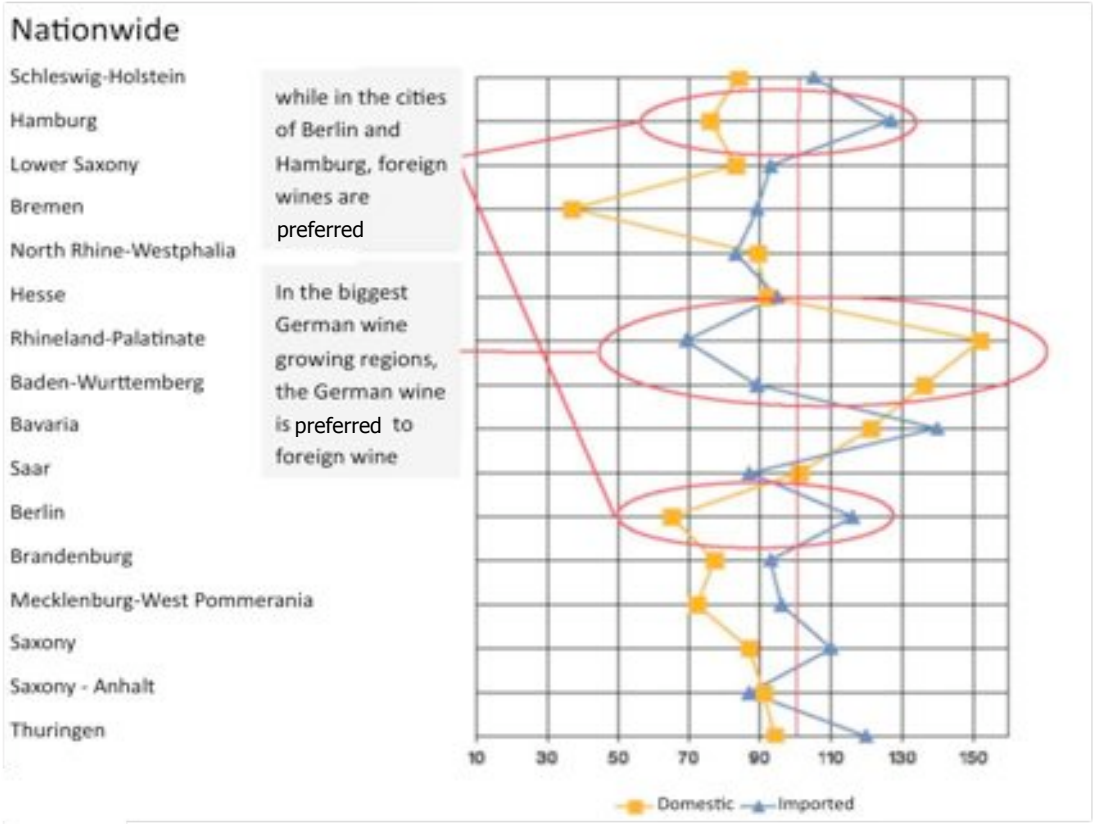

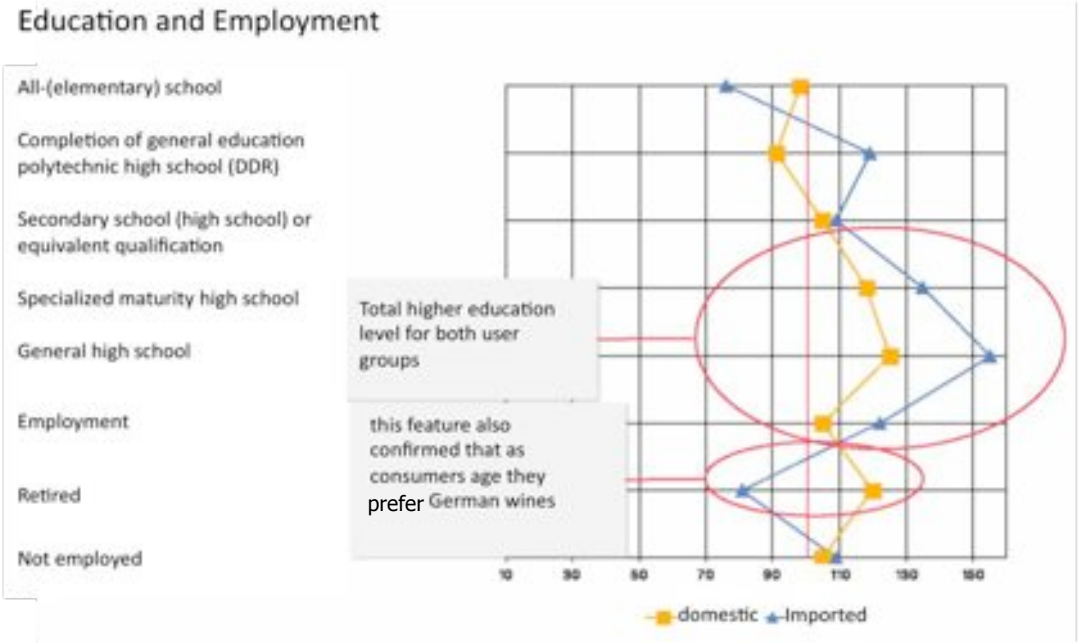

Source: *Rheinhessische Agrartage, Neue Wege im Gemeinschaftsmarketing des Deutschen Weininstituts (DWI), January 2008*

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The up-market consumer

Macrom's POS survey presents interesting findings for the higher socio-economic wine drinker demographics in Germany. Macrom's survey was focused on the specialised retail trade and the top-level food retail trade.

With regards to frequency of wine consumption, 65% of wine drinkers / buyers drink wine several times a week, even daily (22.2%). Men that belong to this cluster consume wine more frequently than women (25.2% to 16.1% respectively on a daily basis, 44.6% to 39.6% on a several times a week basis).

Consumers falling in this cluster consume wine more frequently as age increases (80% of over 60 years old consume wine at least several times a week, compared to 65% -70% for the 31-60 age group, to 25% for the under 30 age group respectively).

As expected, a positive correlation exists between income levels and frequency of wine consumption. 74% of those earning €3,000/month and above consume wine at least several times a week. This percentage drops to 59% for those earning €1,500-€3,000 a month.

Women drive wine consumption

With regards to the general population, women is a key demographic driving consumption[75]:

- Women consume wine more frequently than men: 8.2% of women consume wine several times a week compared to 7.6% for men and 12.5% to 8.2% respectiively consume wine at least once a week.
- The percentage of women that never consume wine is 23.5%, significantly smaller than the corresponding figure for men at 34.7%
- With regards to wine drinking occasions, although women and men seem to choose wine as a daily drink at the same rate (34%), women are about 8%-10% more likely to consume wine at social events, festive events, or offer wine as a present than men
- Women tend to prefer white and rose wines with fruity taste patterns. Men on the other hand have a stronger preference for red wine than women (51.6% over 45.8%) and choose wines that are medium-dry to dry.

[75] Vinissima – Frauen & Wein e.V., The German wine market & Women as wine buyers & consumers in Germany, June 2008. Study based on a weighted sample size of 1,982 respondents.

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Purchase behavior

This section elaborates on the main factors with regards to the German market that affect consumer buying behaviour.

Price, discounts and quality of wine

The German wine market is a very low-value market for wine, for a number of reasons:

- The German consumer is extremely price sensitive, focusing on price primarily and then on the quality of the product. The €1.99 and €2.99 price points are the best established ones and the mass of consumers is very hesitant to go for more expensive wines
- Quality is second consideration and is taken as a given. The state, government and the regulatory mechanism are the upholders for quality standards and hence consumers focus on choosing based on price / personal preference without worrying much about quality
- Discounts and special offers are particularly important in Germany as discount chains such as Aldi and Lidl heavily push own-brand and larger pack size wines at a low cost. Consumers support this and discount operators are facing steep growth curves, as previously discussed

With an estimated average price per bottle of €2.02, the German market poses a great challenge on operating profitably. Trading wine with big retailers and discounters can only be profitable for mainstream wines at large volumes.

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Spending by occasion for the up-market consumer

Focusing on the up-market consumer and based on Macrom's survey on specialised retailers and top-level food retailers, the following pie charts show consumers' preffered price ranges when asked in reference to both every-day wines and wines for special occasions:

Source: *Macrom, Wines of Greece: Market & Competitive Analysis Germany 2008*

From the above graph, the following conclusions can be drawn for up-market consumers:

- The below €2.50 price segment is virtually non-existent. This segment plays a significant role when considering the total wine market in Germany, especially when considering that discounters, who account for approximately 45% of wine volume traded, sell wine at the €0.99 to €3.99 price range.

- 67% of consumers buy their every-day wine at the €5.0 - €10.0 price range, and over 28% of consumers are willing to spend over €20 on a bottle of wine for a special occasion. This clearly shows that the up-market consumer generates value for wine.

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The importance of brands and varietals and denominations of origin and quality

Price is without a doubt the most significant factor when selecting wine for German consumers. With regards to other factors affecting consumer's choice, research suggests that brands and varietals play a more important role in the German wine markets than denominations of origin and quality[76]. This qualitative finding is reinforced by Typologie der Wünsche quantitative finding that 26% of consumers pay special attention to the brand when buying wine.

[76] Geisenheim Research Institute (D. Hoffmann), The German Wine Market – Structure and Trends

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Greece

Greece's domestic market is of critical importance to the Greek wine industry for a number of reasons :

- Wines sales in the domestic market represent approximately 90% of total Greek wines sales by volume (less than 10% of Greek wine is exported)
- There is established brand loyalty and appreciation for domestic wine products in the Greek market: consumers perceive Greek wine as of premium quality and as a result more than 95% of total wine consumed is of greek origin
- Greece is one of Europe's main tourism destinations, attracting over 16 million visitors annually. More specifically in 2007, Greece welcomed 2.3m visitors from Germany, 2.7m from the UK and 381k from the US, which are the Greek wine industry's priority markets going forwards. Trading successfully (on all accounts and not just in financial terms) in the Greek market will have a direct impart on wine export performance.
- A developed, well-functioning domestic market and a sophisticated, educated consumer are essentially definite prerequisites for any country that desires to compete successfully in the international wine market and play a protagonistic role in the global industry.

For all the above reasons, the Greek wine industry needs to focus on improving conditions in its domestic market and work on providing a highly evolved wine experience to Greek and foreign consumers alike, as the latter will be Greek wine's ambassadors in the international scene going forwards.

At this point a special note must be made regarding the accuracy of data on which the Greek report is based. The Greek market and the domestic wine industry suffer from a lack of official, confirmed data and statistical information at all levels: production, domestic and international sales, sales through distribution channels, brand sales etc. Due to this fact, different sources often present significant deviations in their figures between them. Another contributing factor to this is the largely immesurable «night» sales (night clubs, bouzoukia, restaurants), which could potentially represent up to 30%-45% of a brand's sales[77]. Although every effort has been made to cross-check and sense-check all data and information presented in this report, caution must be exercised and small deviations between reported and actual market performance should be anticipated.

All aspects of the Greek market have been analysed and are presented in the sections that follow.

[77] IWSR, Greece Index, April 2008

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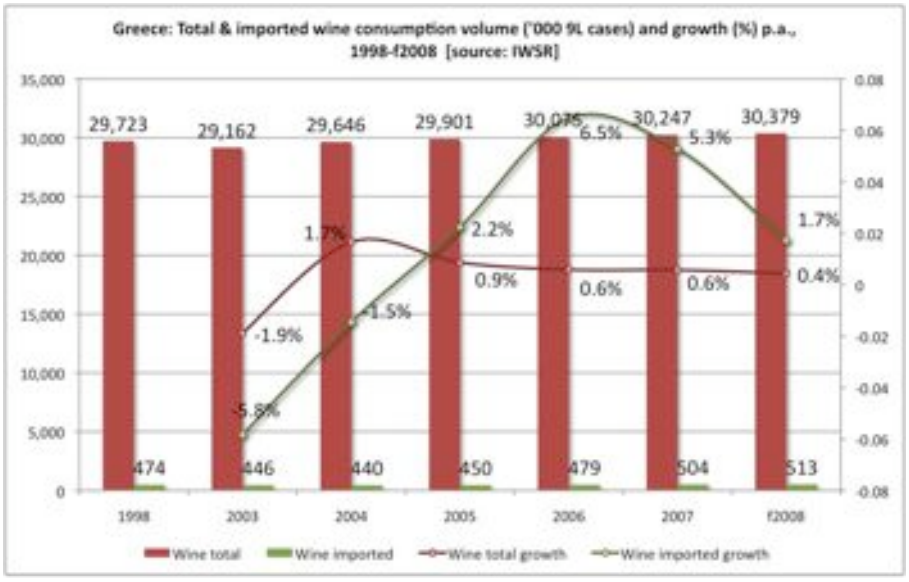
Market profile

Market size

The Greek total wine market[78] is forecasted to reach a total volume of 30,379 '0009L cases in 2008, which shows stable performance (+0.4% increase) on the previous year, As shown in the graph below:



Source: Based on data provided by *IWSR, Greece Index, April 2008*

Two further conclusions may be drawn from this graph:

- Total market size by volume has remained practically stable throughout the previous 10-year period, with most significant fluctuation that from 1998 to 2003 that showed an overall decline of -1.9%. Ever since the market has been on a negligible, yet steady incline of less than 1% p.a.

- In direct contrast with the UK market, where total wine consumption essentially equals imported wine consumption, the Greek market's total volume is practically entirely based on domestic wine sales. Imported wine consumption showed signs of increase in 2006 (6.5%) and in 2007 (5.3%) but this rate is forecasted to decelerate in 2008 and drop to 1.7%. However, given the current economic downturn and the extremely competitive quality/price ratio of the low-priced New World wine labels, growth rate might start to increase disproportionately compared to historic performance.

[78] The wine market includes consumption across the (i) Still Light Wines, (ii) Sparkling Wine (iii) Fortified wine, (iv) Light Aperitifs and (v) Other wine categories

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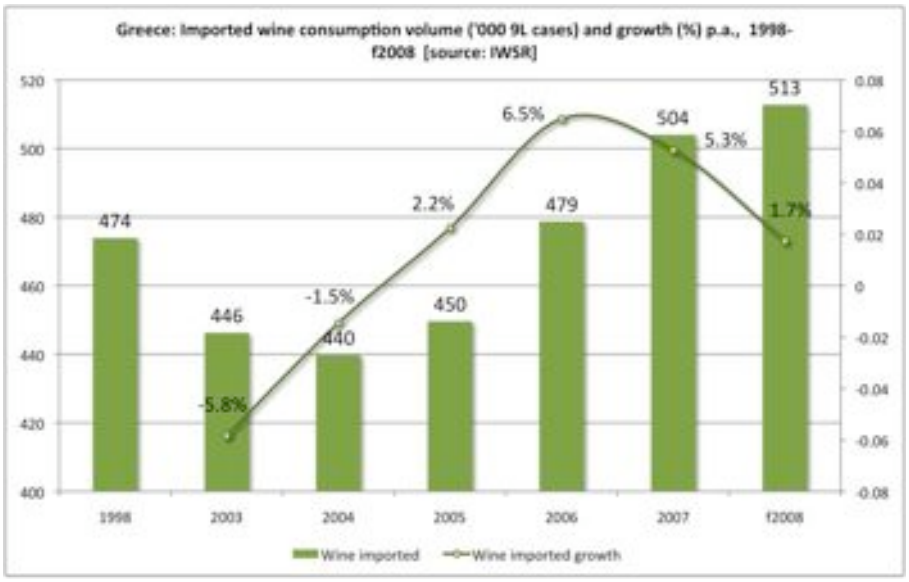
In terms of market value, the SLW market reached €4,827m in 2007, going up by 2.4% from the previous year's figure (€4,714m). The CAGR rate for the 2002-2007 period is even higher at 3.3%, indicatiing a total increase of 17.5% in 2007 from 2002.

Imported wine

Imported wine consumption[79] represents a mere 1.7% of total consumption, clearly pointing out that the Greek market's needs for wine (in general terms, viewing all categories as a whole) are -at present- covered by the domestic production. This percentage corresonds to 513 '0009L cases forecasted for 2008.

Imported still light wine is approximately 52% of the total imported wine consumption, indicating that imports of other types of wine play an important role in shaping total imported wine performance. More specifically for 2007, 25% of imported wine volume was sparkling, 21% was light aperitifs and 2% was fortified wine.



Source: Based on data provided by *IWSR, Greece Index, April 2008*

Since 2005, imported wine consumption has seen higher growth rates than total wine consumption. This has been promoted by the expanding presence of hard discounters in the market such as Lidl, which sell cheap foreign wine at large quantities as well as the advent of the new world with cheap, quality wines and ofcourse the old world's reply with propositions to match their competition.

With regards to value, imported wine sales reached 31.6m in 2006, which is a 13.3% increase on the previous year and a 40.4% increase from 2001 figures. Although

[79] Imported wine consumption across all wine categories, as defined in the Market Size section earlier

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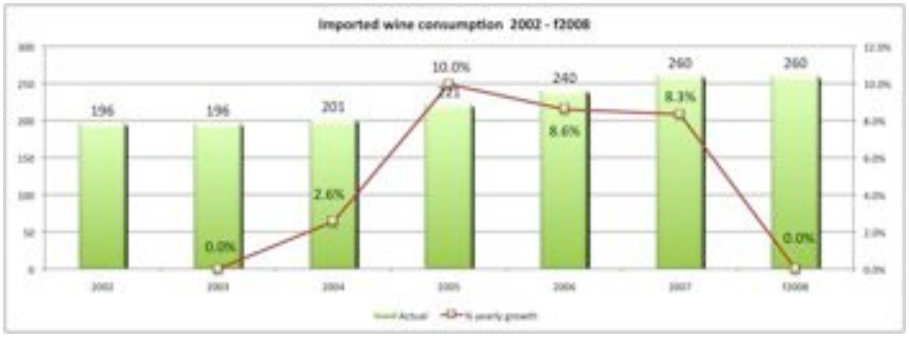
imported wine consumption still remains at low levels today, it is without a doubt one of the most serious threats for Greek wine in its home market. This will be even more visible amidst the current economic environment, aggravated by the Greek wine industry's structural inability to compete on cost-leadership grounds.

At this point, it should be noted that considerable quantities of still light wines are imported in bulk in order to be blended with domestic wines, or to be used in ouzo or brandy after distillation and illegaly be sold as greek wines. IWSR index for Greece reports that Italy exports around 3.5-4.5 million cases per year in bulk for blending into greek wines. The exact amount of such imports is impossible to estimate and industry sources report that such wines are often used illegally for blending.

Still Light Wine

Still Light Wines [80]represent 98.5% of all wine consumption and 50.7% of imported wine consumption in Greece. SLW consumption for imported wine is forecasted at 260 '0009L cases in 2008, remaining stable from 2007:



Source: Based on data provided by *IWSR, Greece Index, April 2008*

Growth appears to be erratic but still at higher levels than the growth of total imported wine consumption, indicating that the growth in wine imports is driven firstly by the SLW category. As Greek wines sell 99.4% of their volume in the SLW category in the Greek market, this further reinforces that the threat posed by international wines needs to be acknowledged and addressed.

[80] Still Light Wines is a subcategory of total wines. Total wines also include sparkling wines, aperitif wines, fortified wines and other types of wine.

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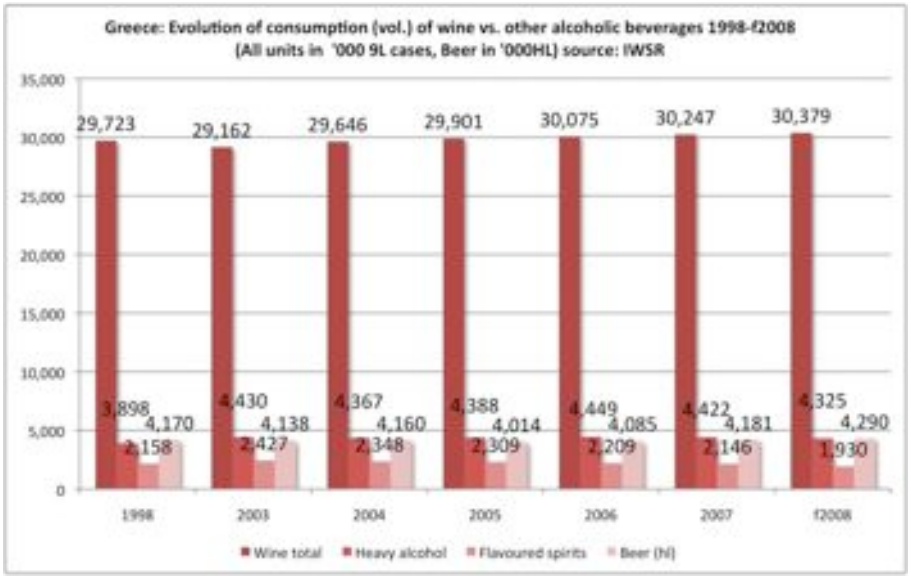
Wine consumption evolution vs. Consumption of other alcoholic beverages

The following chart shows evolution of consumption volume for key alchoholic beverages in Greece[81]:



Source: Based on data provided by *IWSR, Greece Index, April 2008*

The Greek market's perfrormance appears to be relatively stable across most alcoholic categories. The heavy alcohol category is forecasted a small drop of 2.1% in 2008 from the previous year, but remains within the 4,300 to 4,450 '000 9L cases bracket since 2003. Flavoured spirits are expected to show a more significant 10.1% drop in volume in 2008 from 2007, upkeeping with the decrease trend since 2003. 2007 consumption in flavored spirits has already shrinked by 11.6% when compared to year 2003 performance. Beer consumption has been rising in small increments by 2005 and is expected to show a further 2.6% increase in 2008, still though remaining in the 4,100 – 4,300 '000HL bracket.

As a conclusion, it can be said that the increase in wine consumpion is not driven by a consumer preference change from beer. It appears that consumption has shifted from heavier types of alcohol and spirits to wine. This may be especially the case with on-premise consumption and in particular consumption in bars and clubs, as consumers opt increasingly more for wine and beer, which can be a cheaper alternative to heavy alcohol beverages. This trend will be discussed more further in this report.

[81] Wine includes all wine (domestic and imported); Heavy alcohol includes whisky, white spirits, rum and brandy; Flavoured spirits include liqeurs, bitters, spirit aperitifs, aniseed and fruit aux de vie.

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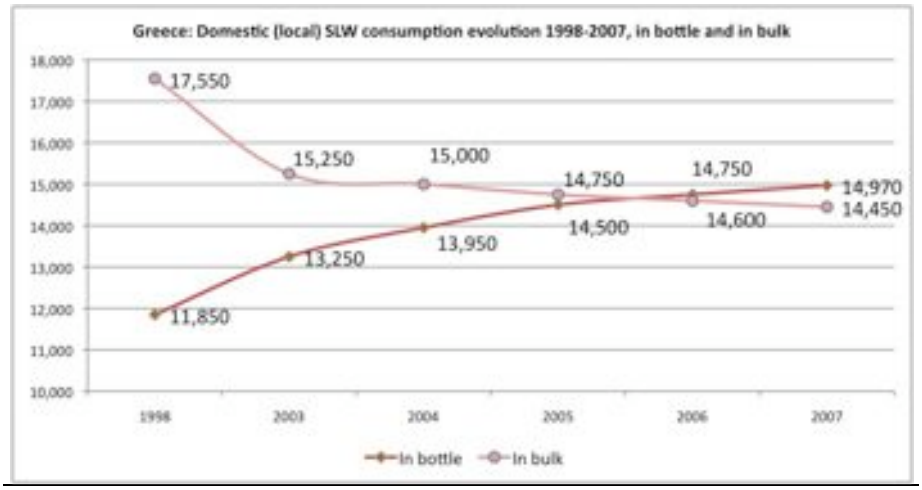
Seasonality and substitutes

Traditionally, wine consumption has been subject to seasonality, demonstrating its peak between October and May, while during summer consumers are switching to subsitures, especially beer and traditional distilled spirits, such as ouzo. However, this is not depicted accordingly in absolute sales numbers, as the incoming tourism makes up for the decreased local demand[82].

Wine consumption by type and category

[N.B.: Given the aforementioned deficiency of official and reliable data, the following should be used to provide mostly qualitative information.]

Approximately half of the SLW consumption in Greece is represented by bulk (unbottled) wine, a share that is gradually and at a slow pace decreasing, as the following graph reveals:



Source: Based on data provided by *IWSR, Greece Index, April 2008*

Unbranded, unbottled wine

Unbranded, unbottled wine is usually artisanal/local produce. Due to the long winemaking tradition in Greece, wine production in quantities up to 1tn is legal, and not to be declared or controlled, provided it is intented solely for home consumption. However, since such production is neither officially recorded, nor regulated, large quantities of artisanal wine are often traded illegally and un-VATed. Such wine is sold either through the on-trade (majority of cases), most frequently under the label of «house wine» or «local wine», or through off-trade channels, such as traditional wine cellars and open-air food markets. Such wines, that do not undergo any kind of

[82] ICAP, Κλαδική μελέτη Οινοποιία, Δεκέμβριος 2006

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quality control, are also often sold directly from the amateur winemaker, claiming to be «pure», «chemical-free», even «organic» (!) produce.

Although there is no way of measuring with a great degree of accuracy the extend of bulk wine trade in Greece, it is estimated that it represents almost a quarter of total wine production (industry sources are feared that this might be even more) and 50% of total wine consumption. This is perhaps one of Greek wine's greatest weaknesses and a major factor shaping the domestic market. As it is predominantly sold through the on-trade, bulk wine is the type of Greek wine that foreign travelers and visitors drink most when in the country, Its less-than-adequate/poor quality plays a major role in shaping negative perceptions of Greek wine in the international audience.

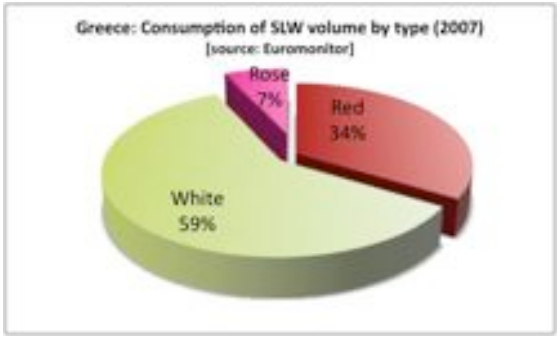
Retsina

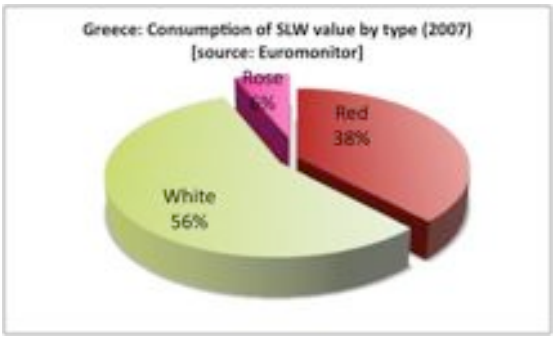
Retsina, a type of white, resinated wine that is often of lower/uncertain quality, plays an important role in the Greek market. According to industry sources Retsina's total share on consumption is around 15%; however, IWSR estimates that 30-36% of total wine sales by volume and around 20-26% bottled wine sales corresponds to Retsina[83].

Nontheless, as retsina is mainly sold in bulk at restaurants and tavernas[84] (around 80% of total retsina sales are estimated to be on-trade), percentages are even harder to be drawn.

Consumption by color and type

According to Euromonitor, in terms of total wine consumption (both domestic and international, on- and off- trade) white wines dominate wine sales by volume in the Greek market with a 59% share; this includes retsina as well. Red wines follow with 34% and Rose wines hold a niche of 7%. In terms of value, however, red wines hold a greater share of the market with 38%, as the following graphs reveal:





Source: Based on data from *Euromonitor, Wine-Greece country sector briefing, March 2008*

[83] IWSR, Greece Index, April 2008
[84] As above

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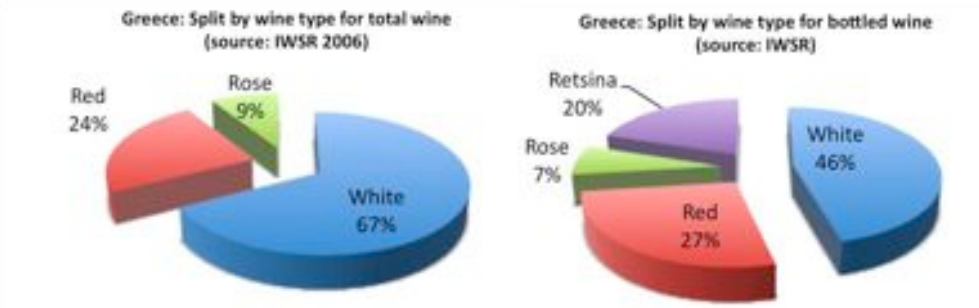
This highlights Greek consumers' perception that red wines are of higher quality than whites and hence are willing to pay more.

Furthermore, IWSR provides a rough estimation for the corresponding breakdown on total wine sales (bottled and bulk - retsina is included in white wines sales) and for bottled wine sales:



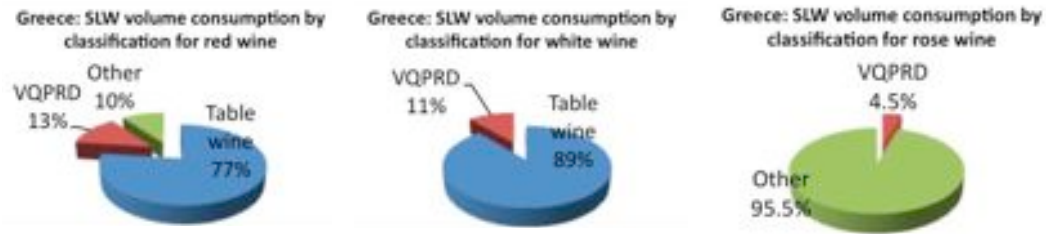
Source: based on data from *IWSR Greece Index Report, April 2008 and IWSR Wine Handbook 2007*

It should be noted that according to Greek wine industry sources, rosé wines share on domestic wine sales (on- and off-trade) is no more than 4% by volume.

Consumption by quality classification

It is estimated that approximately 10% of Greece's SLW production is wine of controlled origin[85], classified as ΟΠΑΠ or ΟΠΕ (the equivalent of the V.Q.P.R.D. classification practically applicable to dry and sweet wines respectively).

In terms of consumption, the following graphs indicate VQPRD wines' share (domestic and imported) across the white, red and rose categories for 2006:



VQPRD share in 2002: red – 11%, white – 8.7%, rose – 3.5%

Source: Based on data from *Euromonitor, Wine-Greece country sector briefing, March 2008*

Figures show an increasing interest and a growing trend for VQPRD wines in Greece. Taking also into consideration the much more significant presence of VQPRD wines in key markets abroad and especially in the old world, this is an area that Greek wine producers should take into consideration going forwards.

[85] Estimate based on IOBE data

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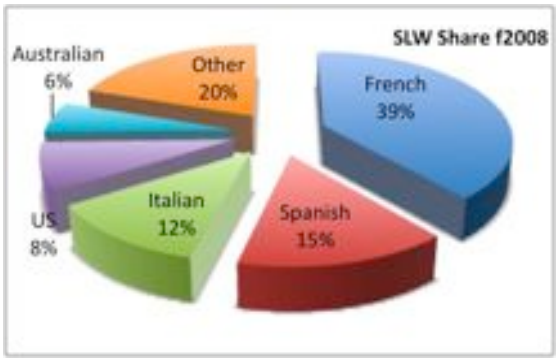
Consumption per country of origin

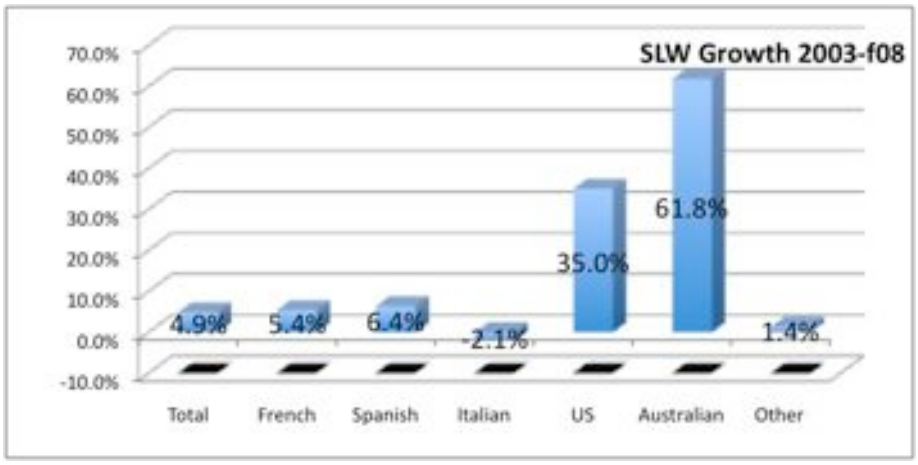
Market role analysis[86]

French wines dominate sales in the slw category in Greece with a 39% share, followed by Spain, Italy, the US, Italy and Australia:



Source: Based on data provided by *IWSR, Greece Index, April 2008*

France is the undisputed leader, Spanish and Italian wines are distant followers with 15% and 12% share respectively, and New World's US and Australian wines hold niche segments of less than 10%. It must be noted however that these niche players are growing at a very fast pace, as the following graph illustrates:



Source: Based on data provided by *IWSR, Greece Index, April 2008*

Australian wine is growing with an average annual rate in excess of 60% and the US follows with 35%. The whole imported SLW category has seen a 4.9% average annual growth rate since 2003, gaining share over domestic wines.

86 - 2002-2006 data taken from IWSR Global Wine Handbook 2008.
- 2007 - f2008 data taken from IWSR Greece INDEX report 2008

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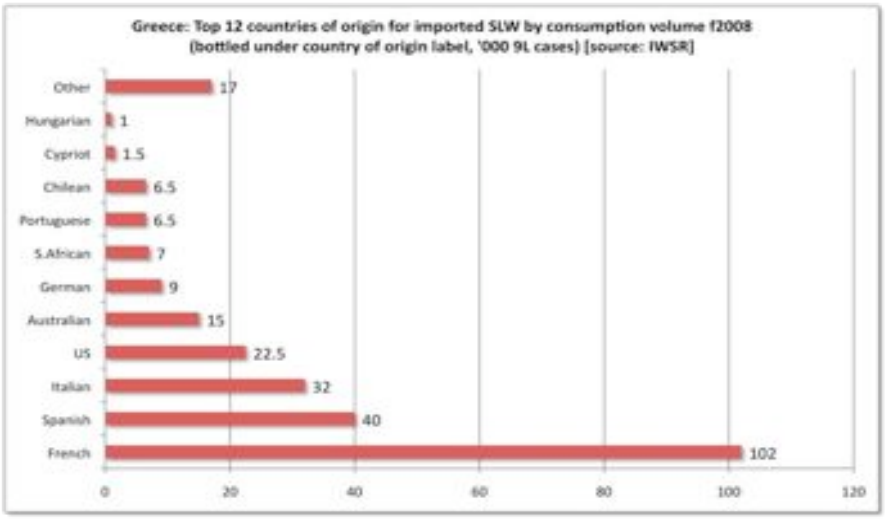
A note should be made on Italian wines' sales evolution during the last decade, which seem to have lost two thirds of their total sales volume since 1998: from 90.000s 9lt cases in 1998 to 32.000s in 2007[87]. A safe assumption for this would be that the greek wines' quality improvements led on-trade players (italian restaurants etc) to switch from italian to greek products.

The rest of the competition

A significant 20% share of the imported SLW pie goes to other countries of origin, some of which could potentially rise up as niche competitors in the future as the Greek market evolves:



Source: Based on data provided by *IWSR, Greece Index, April 2008*

[87] IWSR Greece INDEX report 2008

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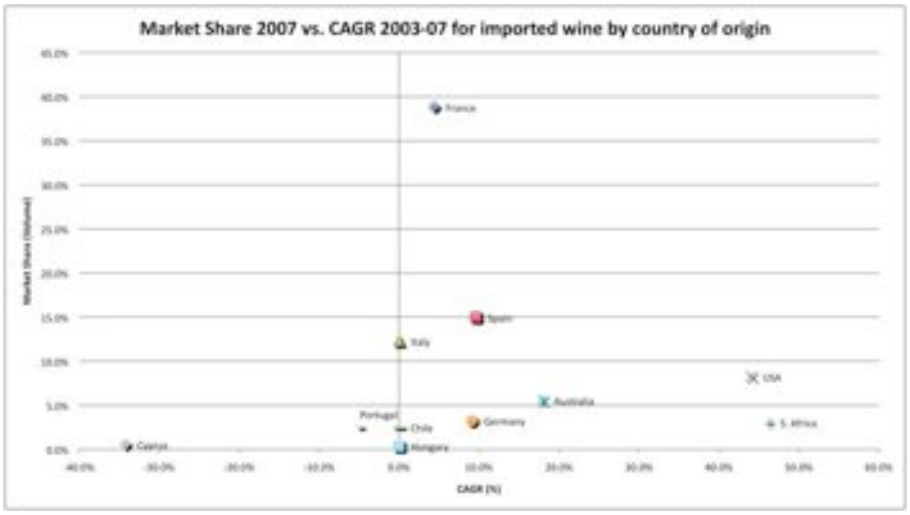
Wines from Germany, South Africa, Portugal and Chile lag not so far behind Australia in terms of volume sold. As the following diagram reveals, South Africa and Germany have been growing[88] at a quick pace over the past few years:



Source: Based on data provided by *IWSR, Greece Index, April 2008*

[88] Growth here is measured as the Compound Average Growth Rate (CAGR): CAGR is the geometric mean growth rate on an annualized basis and it represents the smoothed annualized gain/loss achieved over the entire period in question. CAGR dampens the effect of volatility of periodic gains/losses that can render arithmetic means irrelevant, and is calculated by the formula:

$$\mathrm{CAGR}(t_0, t_n) = \left(\frac{V(t_n)}{V(t_0)}\right)^{\frac{1}{t_n - t_0}} - 1$$

where $V(t_0)$: start value, $V(tn)$: finish value, $tn - t_0$: number of years.

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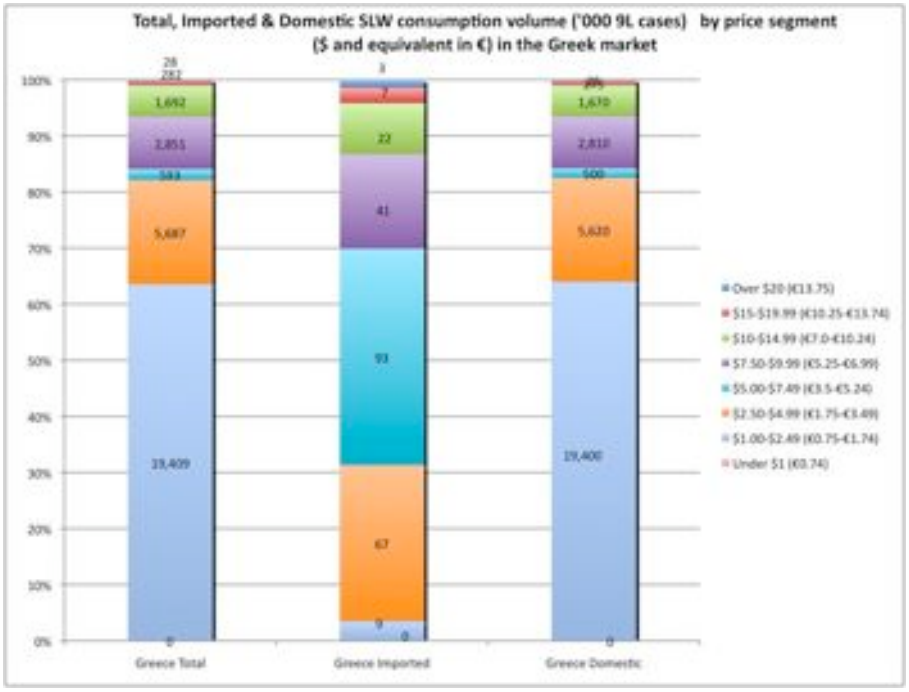
Consumption per price segment

The following graphs shows consumption volume per price segment[89] in the Greek market, both for total and imported wine:



Source: Based on data provided by *IWSR, Greece Index, April 2008 (revised table with prices for 2008)*

The price structures for total and domestic wine are virtually identical, due to the dominance by volume of Greek wines in the market. Imported wine price structure is quite different, with imported wine selling at higher price brackets than Greek wine. Indeed, only approximately 15% of Greek wines sell at prices equal to or higher than $7.5 (€5.25) on the shelf.

Those numbers are strongly defined by the large volumes of retsina and low-value unbottled wine sold, on-trade, as house, caraffe wine, or even through the off-trade, in food markets or cellars, usually in inappropriate PET packaging (an issue discussed earlier in the present report).

In contrast, approximately 30% of imported SLW sells at prices equal to or higher than $7.5, as seen in the graph above. Furthermore, the Under $2.5 bracket for imported wine is only 5% of the volume, a very small percentage when compared to the over 60% corresponding figure of the Greek wine consumption.

[89] Prices are retail shelf prices based on retail audits conducted in leading supermarkets

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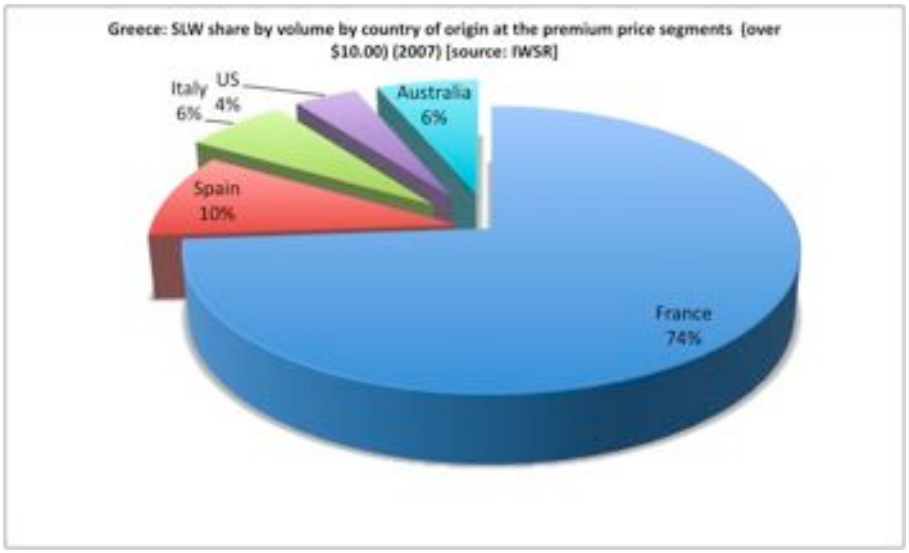
Major brands

Country level

With regards to imported SLW at the premium price levels (>$10), France is the only country of origin for imported wine essentially registering volume of sales at the Over $15 segments. As the following graph reveals, France is the dominant player in premium imported wines with a 74% share on market volume:



Source: Based on data provided by *IWSR, Greece Index, April 2008 (revised table with data for 2008)*

Company level

As of 2007, there were 449 companies that were active and registered in the Greek wine industry (current estimations record more than 570). From those, only 17 companies hold a market share higher than 1%, by 2005 figures.

Despite the relatively large number of companies, the domestic wine industry has a high degree of concentration, with the top-5 and top-10 largest companies holding 49% and 68% of the total market sales volume (on- and off-trade) according to estimations:

Company	Still light wine sales - Share by volume 2005
Boutaris	12.6%
Malamatinas	11.0%
Tsantalis	10.1%
Kourtakis D.	9.4%

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Hatzimichalis	5.7%
Peza Union	4.9%
Achaia Clauss	3.9%
Kostas Lazaridis	3.8%
Cambas	3.2%
Ino	2.6
Others	32.7

Source: *Euromonitor International 2008 based on official statistics, trade associations, trade press, company research, store checks, trade interviews, and Euromonitor International's estimates*

Regarding supermarket sales, excluding Malamatinas company sales, the following table portrays brand share split estimations by volume and value in 2007 and 2008:

Company	Share by volume (supermarket sales)		Share by value (supermarket sales)	
	2007	2008	2007	2008
Kourtakis	9.5	9.6	7.2	7.0
Tsantalis	5.8	5.5	8.1	7.7
Boutaris	5.6	5.0	10.2	9.3
Ino	5.3	4.4	2.7	2.4
Cambas	4.8	3.9	2.8	2.3
Hatzimichalis	1.9	1.8	5.5	5.4
Kostas Lazaridis	1.3	1.6	4.7	5.5
Katogi-Strofilia	1.5	1.3	3.6	3.0
Achaia Clauss	1.5	1.2	1.7	1.4
Spyropoulos	0.6	0.7	1.3	1.3
Samos	0.6	0.7	1.3	1.3
Limnou	0.7	0.6	1.1	1.1
Skouras	0.5	0.5	0.9	1.0
Kir Yianni	0.4	0.5	1.2	1.4
Tselepos	0.5	0.5	1.2	1.2
Gaia	0.4	0.4	1.1	1.2
Antonopoulos	0.4	0.4	1.3	1.1
Creta Olympias	0.3	0.3	0.6	0.7
Vivlia Xora	0.1	0.1	0.5	0.6

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Sigalas	0.1	0.1	0.1	0.3
Mateus	0.1	0.1	0.1	0.1
Gerovassileiou	0.1	0.1	0.3	0.3
Private labels	9.9	12.8	5.6	6.7

Source: Based on industry sources and Karoulias company research

Special mention should be given to the increasing importance of private labels, that represent a cummulative share of almost 13% in total sales volume in supermarkets, indicating the growing for budget, value-for-money products.

Market structure

Distribution model and major players

The wine distribution model in Greece has long been a subject of controversy: the lack of a regulatory framework has led to blurred boundaries amongst different players' roles, promoting confusion, trade disorder and unfair competition.

Under the current regime, wineries sell to distributors, wholesalers, directly to on-trade points-of-sale, and the end consumer. Additionally, several large wine producers assume responsibility for distributing their own products also across the main off-trade points, namely supermarket chains and mega-retailers.

Distributors on the other hand sell to wholesalers as well as directly to retailers (on- and off-trade). Last but not least, some importers / wholesalers apart from catering to retailers, they also sell directly to the consumer through their own (franchise or company-owned) retail outlets.

As a consequence, different players in the wine value chain end up fighting over the same group of customers, a situation that nurtures unfair practices and deals.

However, the consolidation trend is currently reshaping the envrionment, as wineries in an attempt to rationalize their business, outsource distribution and even sign exclusive deals with players.

The following table presents a summary of the main importers, distributors and wholesalers of wine in the Greek market:

Company	Activity
ΚΑΒΑ ΑΝΘΙΔΗΣ	Έκθεση Οίνων & Ποτών – Ανθίδης (**www.anthidis.gr**) Διανομέας και Χ/Ε.Άντιπρόσωπος Ελληνικών και ξένων οινοποιείων. Κρασιά, ποτά, νερά, εισαγόμενες μπύρες. Κάβες λιανικής

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	ΟΠΖΑ (**www.opza.gr**) Αντιπρόσωπος αναψυκτικών,Χ/Ε. Κρασιά αναψυκτικά, μπύρες, νερά, ποτά
	Ζουρνατζίδης Κωνσταντίνος Χ/Ε κρασιών, νερού, μπύρας
	Χάλαρη ΑΦΟΙ (**www.cavahalari.gr**) Αντιπρόσωπος και διανομέας αναψυκτικών, Χ/Ε. Κρασιά, αναψυκτικά, μπύρες, νερά, ποτά. Κάβες λιανικής
	ΙΝΤΕΡΒΙΝΟ ΕΠΕ Αντιπρόσωπος και Χ/Ε αποκλειστικά κρασιών
	Κόνδωρ ΑΕΕΕ (**www.kondor.gr**) Αντιπρόσωπος και Χ/Ε ποτών, κρασιών, αναψυκτικών, μπύρας
	Ντόρτογλου Χ- Ντόρτογλου Δ ΟΕ Χονδρική και λιανική οίνων και ποτών
	Μητζικίδης ΕΠΕ Χονδρική και λιανική οίνων, ποτών, αναψυκτικών, μπύρας, νερού
	Γεωργιλάκης Εμμ. & Ελευθ. Χονδρική και λιανική οίνων και ποτών
	Ποτοεμπορική ΑΕ (**www.potoemporiki.gr**) Χονδρική και λιανική οίνων και ποτών
	Σιγανός ΑΕ Χονδρική και λιανική οίνων, ποτών, αναψυκτικών, μπύρας
	Σαντα Μαουρα ΑΕ (**www.santamaura.com**) Αντιπρόσωπος και Χ/Ε αποκλειστικά κρασιών
	Ποντικάκη ΑΦΟΙ & ΣΙΑ Χονδρική και λιανική οίνων και ποτών

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	Ε&Δ ΑΕ (**www.ekd.gr**) Αντιπρόσωπος αναψυκτικών,Χ/Ε .Κρασιά, αναψυκτικά, μπύρες, νερά, ποτά
	Λίτινας Δ. ΑΕΒΕ Χονδρική οίνων και ποτών
	Καλογεράς Δημ. Χονδρική οίνων και ποτών
	Παπαγιάννης ΑΕ Αντιπρόσωπος και διανομέας αναψυκτικών,Χ/Ε. Κρασιά, αναψυκτικά, μπύρες, νερά, ποτά. Κάβες λιανικής
	Ίτσιος Ι & Γ ΟΕ Χονδρική οίνων και ποτών
Oivo ΤΡΑΠΕΖΑ ΠΑΥΛΙΔΗΣ Α.Ε. PREMIUM Stories	Οινοτράπεζα Παυλίδης ΑΕ (**www.oinotrapeza.gr**) Αντιπρόσωπος και Χ/Ε αποκλειστικά κρασιών
MARINOS	Μαρίνος ΑΕ (**www.marinoszante.com**) Αντιπρόσωπος και Χ/Ε ποτών, κρασιών, αναψυκτικών, μπύρας
GENKA	ΓΕΝΚΑ ΕΜΠΟΡΙΚΗ ΑΕ (**www.genkacomm.gr/**) Αντιπρόσωπος και Χ/Ε αποκλειστικά κρασιών. Καταστήματα λιανικής
	Θηραίος Η. Νικολοπούλου Π. Χονδρική και λιανική οίνων και ποτών
	Θύμης Κώστας ΕΠΕ (**www.nrgtraxx.com/cavathimis/contact.html**) Χονδρική και λιανική οίνων και ποτών

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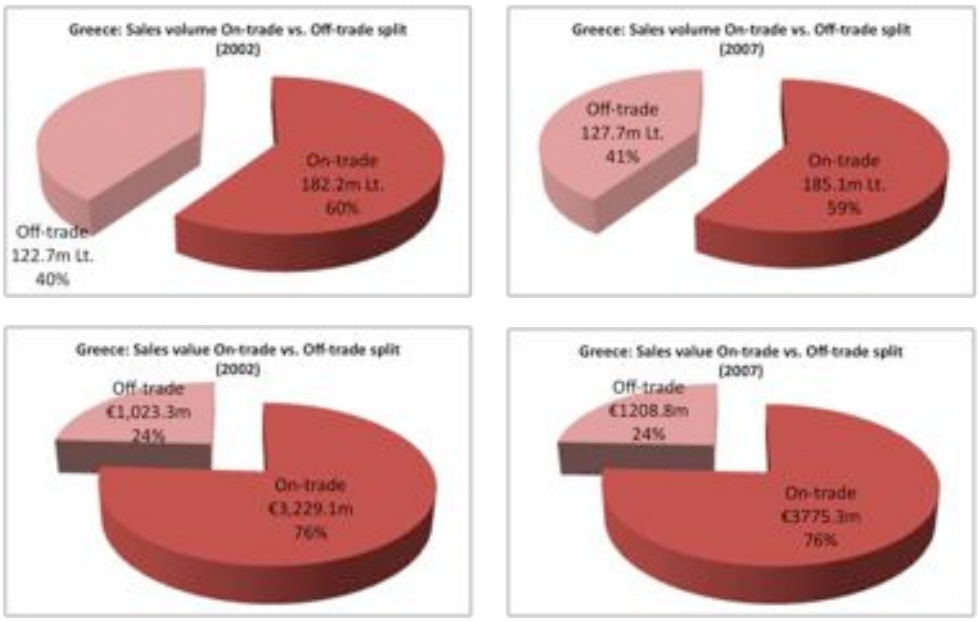
	Αίολος ΕΠΕ (**hwww.aioloswines.gr/main.html**) Αντιπρόσωπος και Χ/Ε αποκλειστικά κρασιών.
	Β.Σ. Καρούλιας (**www.karoulias.gr**) Μία από τις μεγαλύτερες εταιρίες εισαγωγής και εμπορίας οίνων και οινοπνευματοδών ποτών στην Ελλάδα. Η εταιρία περιλαμβάνει στο προϊοντικό της χαρτοφυλάκιο κορυφαία ελληνικά και διεθνή σήματα σε όλες τις κατηγορίες ποτών και μια σειρά επιλεγμένων οίνων υψηλής ποιότητας. Η Καρούλιας προχώρησε σε εμπορική σύμπραξη με την Ι. Μπουτάρης & Υιός τον Απρίλιο 2009 με σκοπό τη δημιουργία της IMA Beverages, η οποία θα προσφέρει στους καταναλωτές σε όλη την Ελλάδα μια ολοκληρωμένη γκάμα ποιοτικών προϊόντων.

Retail channels

The following graphs show sales split by channel, both in terms of volume and value, and evolution in these figures from 2002 to 2007:



Source: Based on data from *Euromonitor, Wine-Greece country sector briefing, March 2008*

Figures show that (i) the on- and off- trade splits have remained constant from 2002 both in terms of volume and value and (ii) perhaps not surprisingly, the on-trade generates larger value compared to its volume.

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According to industry sources, the current economic crisis is going to affect mostly the on-trade as consumers are going to rely more on in-home entertainment. At the same time and in conjuction with the sustaining «premiumisation» trend, mid-priced labels are going be affected more, as wine lovers will move towards low-priced basic wines and super-premium wines.

The off-trade

The off-trade represents 40.8% of the total market for wine by volume in 2007 (0.8% higher than the previous year), and only 24.3% of the market by value (1.9% increase). The higher growth in value is partially fuelled by urban consumers' diminishing access to artisanal (bulk) products and their developing preference towards branded wine due to increasing levels of awareness and knowledge.

The following graph shows sales value split by retail outlet for the off-trade sector:

Source: *Alcoholic drinks in Greece, Euromonitor 2004*

Specialist retailers (cavas) were still - as of 2003 (latest available figures)- the predominant sales outlets for wine in the off-trade. Featuring extended opening hours (7 days a week, open until late) and a large variety of local and foreign wines, specialists have managed to keep the largest piece of the off-trade pie by volume with a 47.5% share.

It must be noted however that specialists have been losing ground to supermarkets, estimated to hold a 43% share of the off-trade market by 2003 figures. Compared to 1998, supermarket's share has grown by 5.5% whilst specialist share has lost 2%. Supermakets have invested more in their wine departments, dedicated more shelf space and are now competing very successfully with lower prices, promotions and even with a large selection of wines to choose from.

The growth of discount supermarkets, such as Lidl, has further strengthened the trend. Lidl in particular has increased its stores in the Greek market from 8 to over 50 within 2004. Discounters offer mostly imported wine of acceptable quality and

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very low prices, which are winning consumers' preference and further increasing supermarkets share of the off-trade.

The role of the discounters in the Greek market today is not accurately represented in the graph above, as retailers of this type have seen tremendous growth over the past few years. The table that follows illustrates this point:

Growth indicator	Dia	Lidl
Turnover growth 2001- 2005	92.5%	157.3%
Number of stores 2005	356	157
Growth in number of stores 2001-2005	162%	171%

Source: IWSR, *Greece Index, April 2008*

With regards to other types of off-trade outlets, such as e-shops, presence is minimal.

The internet

As mentioned earlier in this section, this channel is not developed in the Greek market. The only online greek retailer by the time of publishing of this report is Wineshop (**www.wineshop.gr**), offering both international and domestic wines and a variety of wine accessories and other products.

Major retailers in the off-trade

The following table provides a bried description for each of the main retailers in the off-trade:

Main supermarkets/hypermarkets	
Carrefour	Carrefour (**www.carrefour.gr**) Carrefour merged with local food retail chain Marinopoulos and today operates 20 hypermarkets in the largest cities in Greece and a network of supermarkets and smaller convenience stores.
Βασιλόπουλος	AB Vasilopoulos (**www.ab.gr**) Part of the Delhaize group, Vasilopoulos is an up-market food retailer running wholly owned supermarkets, convenience stores, franchise stores and cash & carry wholesale stores.

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	Sklavenitis
	Veropoulos (**www.veropoulos.gr**) Veropoulos runs a network of over 200 stores, 99 of which are located in Athens, 87 are located in other cities and urban centers across the country, 31 operate under the Chalkiadakis brand in Crete and a final 8 stores operate in FYROM. Veropoulos brings the SPAR brand and its products to the Greek market through its own retail network.
	Atlantic (**www.atlantic.gr**) Perhaps the youngest supermarket chain in Greece, Atlantic was founded in 1980 and today operates a network of 153 wholly owned stores, 28 wholesale stores as well as 545 franchise stores network under the "Arista" brand. The company focuses on Western Greece, the Peloponnese and the islands of the Agean but runs stores across the country.
	Massoutis (**www.masoutis.gr**) Massoutis' supermarket network covers Thessaloniki and Northern Greece with 144 stores from Larissa to Orestiada. The company also operates 15 cash & carry wholesale stores.
	Metro (**www.metro.com.gr**) Greek food-retail company, owner of the "Metro Cash & Carry" wholesale chain and "My Market" retail chain. Currently there are 30 Cash & Carry stores operating across the country and 45 My Market stores operating in Attica.
Discounters	
	Dia% (**www.lidl.gr**) With a portfolio of 400 stores, Dia claims to have the largest supermarket network in Greece. Dia focuses on stores at convenient locations, a robust product portfolio, consisting 50% of own label products and an excellent value-for-money offering for every product.

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	Lidl (**www.lidl.gr**) International discount chain running a simple operation and offering everyday products of "maximum quality" at low prices. Lidl belongs to the SCWARZ group and has stores across Europe.
	Aldi (**www.aldi-greece.gr**) Aiming to offer high quality at low prices, Aldi is part of the ALDI SÜD group. One of the world's leading discounters, Aldi entered the Greek market on November 2008.
Specialists	
	Wineshop (**www.wineshop.gr**) One of the few –if not the only- online Greek retailer for wine, the wineshop offers a selection of Greek and foreign wines, spirits, beers, as well as a selection of other gourmet products.
	Anthidis (**www.anthidis.gr**) Anthidis operates three specialist stores in Kolonaki, Marousi and Glifada. The retailer focuses on a diverse range of quailty wines and spirits, both domestic and imported. Anthidis is a premium retailer with stores located in up-market locations, offering quality products and exceptional service. The Marousi store also organises wine tastings and events and features a wine library available to the members of its club.
	Cava Thimis (**www.nrgtraxx.com/cavathimis/contact.html**) Located at Corfu island, this is a specialist retailer focusing on Greek wines and more specifically on local wines from the Theotoky Domaine in Corfu.
	Cava Vinifera - Σταυρινίδης Ν. & Ζουμπούλη Α. (**www.vinifera.ondsl.gr**) The retailer operates two stores in Kifissia and Psichiko.

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	WINE GARAGE ΕΠΕ (**www.winegarage.gr**) Wine Garage operates 3 stores in Kolonaki, Ekali and N. Psichiko. Wine Garage brings a diverse portfolio of New World and Old World wines to complement its Greek wine offering.
	Cellier (**www.cellier.gr**) Part of ΓΕΝΚΑ, Cellier operates 6 wine specialist stores, 5 located in Athens and one in Mykonos island, offering quality Greek and imported wines. Cellier also operates its own wine club offering its members discounts, free deliveries of orders, the option to attend special events as well as the option to pre-buy (en-primeur) wines.
	Cava Halari (**www.cavahalari.gr**) Cava Halari focuses on premier wines and spirits from Greece and abroad. The retailers also puts emphasis on its gift wine and spirits basket options.

The on-trade

The on-trade is the leading channel of the wine market, with 59.2% share by volume and a dominating 75.7% by value. A major driver for on-trade sales is the low-price non-bottled wine as well as the large quantities of retsina. Over the 2002-2007 period however, the on-trade's CAGR has been lower than the off-trade's both by volume (0.3% compared to 0.8%) and by value (3.2% compared to 3.4%). This indicates an increase in home consumption, partly driven by the harsh economic conditions over the past few years and supported by a continuously improving offering in retail outlets and supermarkets, inviting consumers to spend more time at home.

Slowing down of on-trade consumption growth however has been paired with increase in bottled, branded wine consumption. Notably, the share of glass packaging increased from 27% to 36% between 1998 and 2003 (Euromonitor 2004), a rather safe indicator that consumers are gradually becoming more knowledgeable and are prepared to pay more for quality products, yet enjoying them in smaller quantities.

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On the other hand, on-trade wine consumption has been - and expected to continue being - favored by a number of reasons even amidst the economic downturn:

- The introduction of stricter drink driving legislations in June 2007 has led the growth of the on-trade wine consumption. Wine, as a lighter alcoholic beverage, has gained the preference of consumers who choose to drive from and to night entertainment venues
- A growing number of young female consumers that opt for wine
- The image shift for wine as a fashionable and up-market option
- Wine providing an alcoholic beverage option that is more economical than heavy alcohol alternatives
- An increasing number of restaurants and other on-traders are gradually switching from unbottled to branded, bottled wine, a factor expected to boost the channel's performance, especially in terms of value.

In relation to the latter, it should be noted that lack of wine knowledge (and sometimes business sense) has led to irrational mark ups for bottled wine sold on-trade. According to industry sources, wine lists' prices in the majority of bars and restaurants are disproportionately calculated, not taking into account actual shelf prices and relative quality levels of wine labels. A situation depicted in consumers' perception of greek wine being inexplicably expensive in restaurants. (Greek consumers' perceptions are presented and analysed in Deliverable 1.3: Brand Knowledge and Brand Image of greek wine).

Moreover, the on-trade wine experience in Greece is hardly considered up-to-standards, mostly due to professionals' lack of education. As a consequence, and besides the questionnable product quality (analysed earlier in the Unbottled, unbranded wine section), HORECA players rarely pay adequate attention to preservation conditions, or glassware and accessories used, even for flagship products in their wine lists.

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Catalysts, trends, consumer perception and behavior analysis

The following section identifies catalysts and trends in the wine domain, consumer perceptions regarding wine, as well as behavioral patterns influencing purchases in the Greek wine market.

N.B.: Due to the fact that global sustaining and emerging trends in the wine domain are exhaustively presented and analysed within Deliverable 1.1, the present analysis only highlights those trends among them that mostly affect Greek consumers.

Wine & gastronomy catalysts

Within the scope of the present study, the opinion-leading entities in the wider wine, gastronomy and entertainment domains, which shape consumers' perceptions and behavior, were identified and profiled.

The selected catalysts are either related to the wine industry or draw wine enthusiasts or appeal to an audience that enjoys wine in general, and were selected according to their degree of influence in the Greek market. Thus, they include:

- Influential lifestyle, variety, well-being, gastronomy and wine media as well as those regarded as catalysts irrespective of subject – however they feature wine sections or ad hoc articles; these include print, online, social and audiovisual media
- Influential professionals such as chefs, wine experts, editors and other gastronomy celebrities have been included
- Venues such as trend-setting restaurants and bars have also been researched
- High profile industry events targeted at trade players or end-consumers, such as awards, fairs and exhibitions.

Although there cannot be a definitive rule regarding who is considered to be a catalyst, certain patterns and common features emerge from research. The significance of the creative class becomes apparent in view of the profile and locus of the identified catalysts. The creative class, a term introduced by social scientist Dr. Richard Florida, describes a group of people, that are considered to be a key driving force for economic development of post-industrial cities; it consists of scientists, engineers, managers, innovators and people in research and development, as well as artists, writers and musicians, thinkers, decision-makers, who influence cultural phenomena and impact business . Their impact not only on the evolution of the consequent creative centres but also on the further concentration of individuals that excel in their domains is evident.

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Wine and gastronomy catalysts are presented and profiled in Appendix C in an extensive –yet not exhaustive- list. The methodology for the initial selection and finalisation of catalysts list is also presented in the Appendix. It should be noted that factors such as recognition, i.e. awards or Michelin stars, popularity, circulation and readership were primary.

Trends and consumer perceptions on wine

Even though global sustaining and emerging trends in the wine domain are exhaustively presented and analysed within Deliverable 1.1, the section hereafter aims to briefly highlight those trends among them that will mostly affect the Greek wine market in the near future.

Loyalty to domestic wines

Wine is considered as one of Greece's integral cultural elements, closely intertwined with the nation's history over the centuries. Greek consumers attach to wine, whether it is every-day, cheap wine such as most Retsina in the market or an expensive, chateau vintage wine, great emotional value and has traditionally been considered an essential component of the basic meals of the day (lunch and dinner).

The Greek consumer has strongly supported the national wine offering, the minimal imported wine volumes are a testament to this fact. However, significantly more economical wines of the New World as well as higher price - higher quality alternative options from big wine producing countries such as Spain and France have been gaining share and increasing their presence in the market, posing a threat to domestic wines that cannot be ignored.

Lack of wine education

Despite the fact that winemaking boasts a millennia-old tradition, greek consumers have been seriously lacking wine culture. As a consequence, consumers demonstrate distorted criteria in terms of the wine quality, often appreciating even oxidised products. Additionally, unbottle, unbranded wine, sold in bulk, is seen by many consumers as the most «natural», «pure», «trustworthy» option available, while bottled wines are thought to be chemically-treated and full of preservatives. As discussed earlier on, in most cases, this assumption is false, as bulk wine has not necessarily been tested and can potentially even be harmful to the individual.

On a more positive note, greek consumers have lately joined the international wine trend, a fact further supported by the amount of relevant publications and newspaper supplements that promote gastronomy and wine indulgement. Moreover, wine lovers have been embarking upon educational activities, such as wine seminars

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and visiting wineries, that enhance their understanding and restore their appreciation criteria.

Healthy drinking

Wine in Greece has been linked to good health and longevity throughout the centuries. Today wine is perceived as an integral component of the broader Mediterranean diet, the Greek cuisine and even the more local dietary expressions across the country, such as the Cretan cuisine.

The link between wine and health is becoming increasingly more important to consumers, under the overall «health & wellness» global trend, which is also having a growing impact in the greek market today.

Organic wine - a potentially promising trend

Organic wine, or more accurately put «wine from organically grown grapes», since the EU has not introduced the relevant legislatory framework as of time of publishing of this report, is sold in negligible quantities in the Greek market. Currently, any organic and eco-conscious attributes that a wine may possess carry little weight with regards to shaping Greek consumers' buying behaviour. Such wines are just now making their first steps both in the domestic wine industry and the Greek market and they appeal to a very small niche segment.

Nonetheless, the «organic» area is considered highly promising and is expected to see significant growth in the Greek industry going forwards. The new generation of winemakers and small «boutique» producers that have played the protagonist role in the rennaisance of the Greek wine industry are showing a great interest in organic wine and bio-dynamic cultivations. As a first result of this in the period 1993-2001, the size of bioligically cultivated vineyards increased at an average rate of 61% p.a.

Organic wines can play a key role in shaping a competitive wine offering for Greek winemakers, although this would be initially limited to foreign markets. As of 2004, 20% of Greek wine produced by organically grown grapes was exported and sold in foreign markets. This share is double the share of the total Greek SLW that is sold outside the Greek market.

It is possible in the future and as the Greek wine consumer becomes more educated and increasingly more concerned with regards to green issue that organic wines consumption will emerge as a trend in the Greek market as it has to more developed wine markets abroad.

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Consumer groups and purchase behaviour

Demographics vs. Wine consumption

As in the cases of international markets, wine consumption increases in parallel with income, while expenditure regarding wine purchases is greater in the urban creative centre of Athens. Women, as expected, are proved to be a powerful driver in the wine market.

Wine consumption vs income and residence[90]

The average Greek household (according to the latest National Statitistical Service of Greece research in 2004/5) has a monthly expenditure of €12.39 on alcoholic beverages, which is the equivalent of 0.7% of the average monthly household income (€1792.28). Wine holds a 34.2% share, coming second to Spirits, with a share of 37.2% but ahead of Beer, with a 28.6% share.

Wine share increases further over spirits and beer in households with a monthly income in the bands of €1,101 – €1,800 and over €3,501. Beer only has a larger share than wine (43.6% to 26.4%) in households with monthly income of less than €750.

Households located in urban areas have an average monthly expenditure on wine of €4.34, noticeably higher than the expenditure of households in rural areas, amounting to €3.92. Wine expenditure in rural areas however represents a higher proportion of total alcohol expenditure when compared to the corresponding figure for urban areas, which is 40.0% to 32.5%.

With regards to the Athens prefecture, expenditure on wine climbs ever higher at €4.98 per month, still this represents a relatively smaller share of total spend on alcohol, at 32.7%.

Women drive wine consumption

As in the foreign markets examined within the present study, women are a key demographic when it comes to wine consumption. According to a survey conducted in 2006 by Greek Women of Wine[91], among an urban, relatively young, upper-medium socio-economic women's group, wine demonstrated almost 100% penetration both in terms of consumption and purchase.

Interestingly enough, bottled wine was high in preference, as 87% of respondents said they only buy bottled wine (partly explained by the fact that 42% of women in

[90] Source: Data on this section is based on the following reports: Κλαδική Μελέτη: Οινοποιία, ICAP, 2006; Παραγωγή Κρασιού – Ανάλυση αγοράς, Hellastat 2008; Κλαδική Μελέτη: Ο Κλάδος της Οινοποιίας, IOBE 2007

[91] among 500 women, of which: more than 70% lived in Athens; 60% belonged to the 28-40 age group; and 60% had higher education.

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the survey stated they purchase wine for dinner with friends, while another 11% as gift), while 35% said they only drank bottled wine.

In terms of freqency, 75% of the respondents said they drink wine 1-2 times a week, a percentage growing in parallel with age.

Another interesting element was the fact that, although only a fifth of respondents admitted to have participated in wine seminars and only 30% know VQPRD wines, yet, women seem to be knowledgeable regarding their selection. In off-trade purchases, grape variety, the producer's brand and the region of origin are the main factors influencing women's choice.

Despite the fact that the survey's respondents' basis was not fully representative of the greek market, according to strict scientific criteria, yet, its findings confirm corresponding ones from international markets, and are considered valid, at least at trend indication level.

Purchase behaviour

This section elaborates on the main factors with regards to the Greek market that affect consumer buying behaviour.

Main factors influencing the consumer buying process

The Greek consumers' buying process is simple and straight-forward[92]:

- Awareness and familiarity are the foremost important factors affecting the consumer buying process with regards to wine in Greece. The consumer chooses wines that has tried in the past and there is usually a great degree of loyalty to producers (e.g. Kourtakis for retsina), brands (e.g. Moschofilero – the name of the varietal was in a great extent made popular through Boutaris' brand of the same name) varietals (e.g. Agiorgitiko, particularly of the Nemea region) and even labels (Makedonikos Tsantali, with its distinctive label and bottle shape).

- Price is the second most important factor, as the majority of consumers tend to stick loyal to wines they trust, even if the prices climb up to an extend. Nonetheless, the role of price is expected to play a more important role as (i) consumers become more educated on wine and start being able to appreciate quality and value for money when they select wines and (ii) the effects of the economic crisis become more severe. Price will be discussed in more depth further down in this report.

[92] Based on the following reports: Κλαδική Μελέτη: Οινοποιία, ICAP, 2006; Παραγωγή Κρασιού – Ανάλυση αγοράς, Hellastat 2008; Κλαδική Μελέτη: Ο Κλάδος της Οινοποιίας, IOBE 2007

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- The role of friends' recommendations and positive word-of-mouth also play a role in the consumer buying process.

- Unfortunately, taste character is not one of the important factors influencing consumer choice. The majority of consumers lack "wine culture" and have received little education with regards to appreciating wine, its flavors and aromas. This is reflected on the wine labels, the majority of which fail to offer any taste or food pairing information regarding the content of the bottle.

The role of price and discounting

The Greek food retail industry has seen the advent of discount chains over the past five years and their evolution as a key driving force to the market. Makro is an important player in the market, DIA operated 254 stores as of 2002 and LIDL increased its discounters from 8 to 50 within 2004. These retailers, pursuing the «stack them high, sell them low» approach offer a limited selection of –mostly imported- cheap wines, that are however of acceptable quality and are gaining customer preference.

Larger supermarket chains, such as Carrefour, Sklavenitis and AB Vasilopoulos are not shunning this approach; Having invested heavily in improving the «look and feel» of their wine departments (which range from an isle in smaller stores to dedicated areas that feel like a store-in-store in larger supermarkets) they are offering special promotions, wines in heavily reduced prices and even own-label wines.

In light of the economic crisis, price competition has been intensified and the wine isle in supermarkets has been no exception to this.

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Appendices

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

1. Country of origin: Argentina

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Trapiche Argentina

Tag line

Trapiche's complete protofolio offers the best option for every occasion

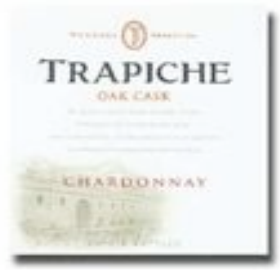
TRAPICHE
ARGENTINA

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

TRAPICHE
ARGENTINA



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Top 3 still light wine labels	No Tag line

Trapiche Malbec

Visual identity & Product imagery

TRAPICHE MALBEC
Single Vineyards

Trapiche Iscay — Two excellent wine-making cultures

Visual identity & Product imagery

Trapiche Varietales — No Tag line

Visual identity & Product imagery

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Bodega Capena Zapata

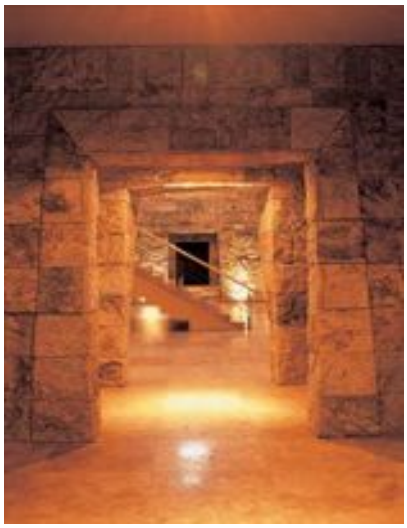
Tag line

We are dedicated to unlocking the secrets of our land and proud to bring the Mendoza's wines to the rest of the world

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels	
Nicolas Catena Zapata	intense aromatics and excellent complexity.
Visual identity & Product imagery	
Malbec Catena Zapata	the highest quality fruit becomes part of this exceptional Malbec.
Visual identity & Product imagery	
Alamos	Our goal is to be true to our "house" style of rich and concentrated wines that have distinct varietal character.
Visual identity & Product imagery	

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Marcus James

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Cabernet Sauvignon	No Tag Line
Visual identity & Product imagery	
Merlot	No Tag Line
Visual identity & Product imagery	
	No Tag Line
Visual identity & Product imagery	

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Trivento Bodegas

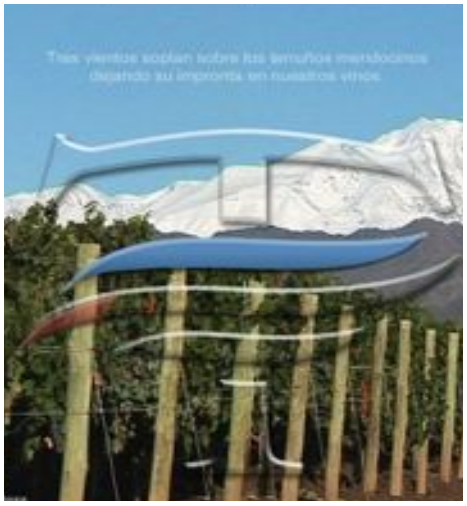
Tag line

Argentina Naturally

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels	
Trivento Tribu, Sauvignon Blanc	a variety to discover, explosion of aromas and
Visual identity & Product imagery	
Golden Reserve, Malbec	Our Malbec is the original Malbec
Visual identity & Product imagery	
Pinot, Chardonnay, blanco	elegant and delicate
Visual identity & Product imagery	

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

2. Country of origin: Australia

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Alice White

Tag line

Have a glass with Alice

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

©2009 PRC Group - Critical Publics London - Altervision

Top 3 still light wine labels		
Chardonnay	No Tag Line	
Visual identity & Product imagery		
Merlot	No Tag Line	
Visual identity & Product imagery		
Riesling	No Tag Line	
Visual identity & Product imagery		

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Banrock Station

Tag line

Good earth, fine wine, Help us help the arth, Supporting global conservation

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

©2009 PRC Group - Critical Publics London - Altervision

Top 3 still light wine labels	
Sparkling Shiraz	No Tag line
Visual identity & Product imagery	
Shiraz mataro	No Tag line
Visual identity & Product imagery	
Colombard Chardonnay	No Tag line
Visual identity & Product imagery	

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Black Swan

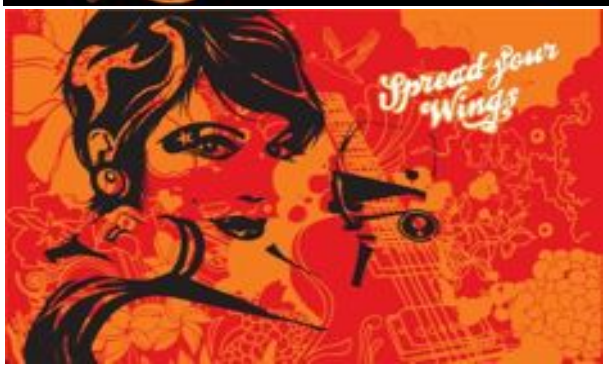
Tag line

Spread your wings

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels	
Cabernet	Delightful aromas of mint and smoke twirl in unison in the nose
Visual identity & Product imagery	
Shiraz	blended in harmony to create an elegant, remarkably smooth wine
Visual identity & Product imagery	
Shiraz - Merlot	unique combination of Aussie favorites
Visual identity & Product imagery	

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Hardy's

Tag line

create quality wines that will be prized in the markets of the world

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

©2009 PRC Group - Critical Publics London - Altervision

Top 3 still light wine labels	
Hardys Shuttles Chardonnay	No tag line
Visual identity & Product imagery	
EILEEN HARDY SHIRAZ	No tag line
Visual identity & Product imagery	
Nottage Hill Shiraz	No tag line
Visual identity & Product imagery	

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Jacob's Creek

Tag line

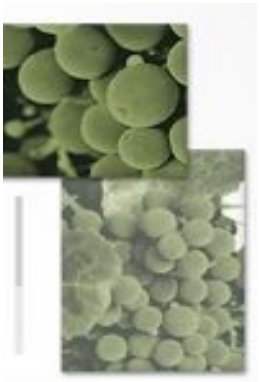
create a wine that goes with any occasion that can be drunk now or, depending on the wine style

JACOB'S CREEK

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



JACOB'S CREEK
Welcome to our place.

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Top 3 still light wine labels	
Cabernet 2004	No Tag Line
Visual identity & Product imagery	
Vintage Shiraz	No Tag Line
Visual identity & Product imagery	
Chardonnay Pinot Noir Sparkling	No Tag Line
Visual identity & Product imagery	

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Lindemans

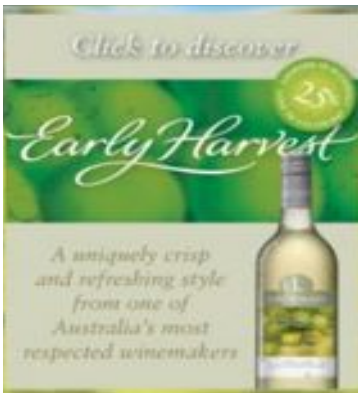
Tag line

the purpose of wine is to bring happiness

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels	For a chance to win, share your live life lightly goal

Early Harvest	[Tag line]
Visual identity & Product imagery	
Cawara Shiraz Cabernet	No Tag Line
Visual identity & Product imagery	
Trapiche Varietales	No Tag Line
Visual identity & Product imagery	

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Little Penguin

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

©2009 PRC Group - Critical Publics London - Altervision

Top 3 still light wine labels

Shiraz	No Tag Line	
Visual identity & Product imagery		
Chardonnay	Lovely Balance, incoporable elegance	
Visual identity & Product imagery		
Merlot	No Tag Line	
Visual identity & Product imagery		

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Penfolds

Tag line

To the visionaries, to the creative to those who do things with love, not money

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*

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Top 3 still light wine labels

Koonuga Hill	A wine to be succesful would need to overdeliever in
Visual identity & Product imagery	
Grange	Grange is a wine of extraordinary dimension and power
Visual identity & Product imagery	
Bin	Classicly Penfolds
Visual identity & Product imagery	

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Rosemount

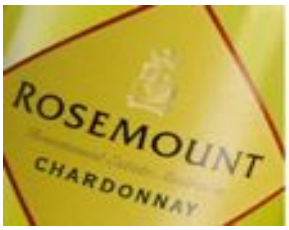
Tag line

dedication to wine quality, innovation and style

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



Wine Profile

©2009 PRC Group - Critical Publics London - Altervision

Top 3 still light wine labels		
Rosemount	No Tag Line	
Visual identity & Product imagery		
Shiraz	No Tag Line	
Visual identity & Product imagery		
Hunter Valley Chardonnay	No Tag Line	
Visual identity & Product imagery		

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Wolf Blass

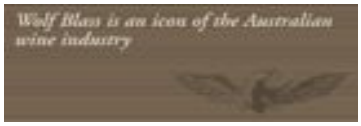
Tag line

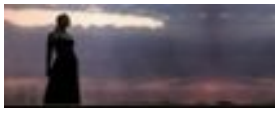
Australian wine at its peak

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)





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Top 3 still light wine labels	
Platinum label	vintage
Visual identity & Product imagery	
Black label	The best parcels of grapes from each vintage are kept to create the ultimate the Wolf Blass Black Label
Visual identity & Product imagery	
Grey label	Premium wine that consumers and trade alike have grown to respect
Visual identity & Product imagery	

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Yellow Tail

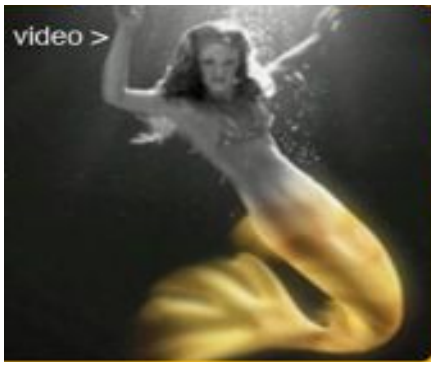
Visual Identity

Tag line

Tails, you win

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels

Chardonnay	No Tag Line	
Visual identity & Product imagery		
Shiraz	No Tag Line	
Visual identity & Product imagery		
Shiraz Cabernet	No Tag Line	
Visual identity & Product imagery		

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

3. Country of origin: Chile

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Casa Lapostolle

Tag line

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*

Top 3 still light wine labels

Casa Cabernet Sauvignon [Tag line]

Casa Chardonnay [Tag line]

Casa Sauvignon Blanc [Tag line]

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Concha Y Toro

Tag line

Discover our wines

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Terrunyo — [Tag line]

Frontera — Chile in a glass

Casilero del diablo — wine legend

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Cono Sur

Tag line

no family trees, no dusty bottles, just quality wine

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

OCIO Pinot noir [Tag line]

Ocio is life itself, condensed in a moment, a moment worthy of this enological epiphany: Ocio, Cono Sur's icon wine and Chile's first ultra premium Pinot Noir.

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Vision Riesling	Clean cut, sharp and distinct notes of citrus – lemon, lime and grapefruit – mingle in with quince and white flower touches.	

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El Emperador

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

N/A

Top 3 still light wine labels

Sauvignon [Tag line]

Cabernet [Tag line]

Merlot [Tag line]

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Errazuriz

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Don Maximiano [Tag line]

Estate Cabernet Sauvignon [Tag line]

Chardonnay Max Reserva [Tag line]

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Isla Negra

Tag line

wines from a mythical land

ISLA NEGRA

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Isla Negra High Tide [Tag line]

Isla Negra Reserva [Tag line]

Isla Negra Range [Tag line]

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Luis Felipe Edwards

Tag line

Elevating Quality

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

BEBIBILIDAD	The Spanish term Bebibilidad directly translates to the English 'Drinkability'.

DOÑA BERNARDA	Our icon wine is a premium blend from our best sites, with Cabernet Sauvignon always forming the base.

ROSA BLANCA ORGANIC WINE	Organically grown grapes in our vineyards produce an elegant Cabernet Sauvignon, these vineyards bordered by the Iceberg white rose have minimal interference during the year.

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Montes

Tag line

Premium Wines

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*

Top 3 still light wine labels

Chardonnay [Tag line]

MONTES A Pinot Noir [Tag line]

Sauvignon Blanc [Tag line]

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Walnut Crest

Tag line

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*

Top 3 still light wine labels

MERLOT [Tag line]

CABERNET SAUVIGNON [Tag line]

CHARDONNAY [Tag line]

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

4. Country of origin: France

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Baron Philippe de Rothschild

Tag line

Art and Wine Blend in the world of Baron Philippe de Rothschild

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

DOMAINE DE BARON'ARQUES

BARON PHILIPPE DE ROTHSCHILD S.A.

A few acres for producing wine+ and a whole world to sell it in.

©2009 PRC Group - Critical Publics London - Altervision

Baron Philippe de Rothschild

Top 3 still light wine labels

Aile d'Argent [Tag line]

Visual identity & Product imagery

Almaviva [Tag line]

Visual identity & Product imagery

Chateau d'Armailhac [Tag line]

Visual identity & Product imagery

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Barton & Guestier

Tag line

Purveyors of Joie de Vivre since 1725

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Bordeaux Rouge	[Tag line]
Chablis	[Tag line]
Sancerre	[Tag line]

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Blanchet

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	

Pouilly Fume Cuvee Silice	[Tag line]
Visual identity & Product imagery	

label	[Tag line]
Visual identity & Product imagery	

label	[Tag line]
Visual identity & Product imagery	

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J.P Chenet

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Chardonnay	[Tag line]
Visual identity & Product imagery	
Cabernet-Syrah	[Tag line]
Visual identity & Product imagery	
Merlot	[Tag line]
Visual identity & Product imagery	

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Fat Bastard Wines

Tag line

Living Large

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Cabernet Sauvignon	[Tag line]
Chardonnay	[Tag line]
Merlot	[Tag line]

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French Connection

Tag line

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*

Top 3 still light wine labels

Cuvee White [Tag line]

Visual identity & Product imagery

Classics- Costieres de Nîmes [Tag line]

Visual identity & Product imagery

Special Reserve Shiraz [Tag line]

Visual identity & Product imagery

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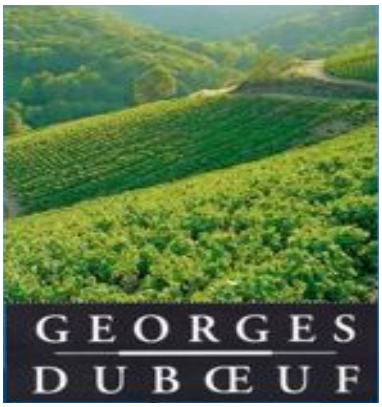
Georges Duboeuf

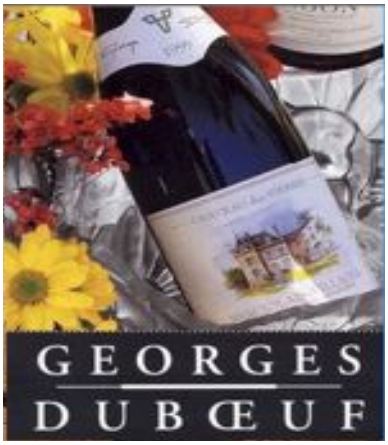
Tag line

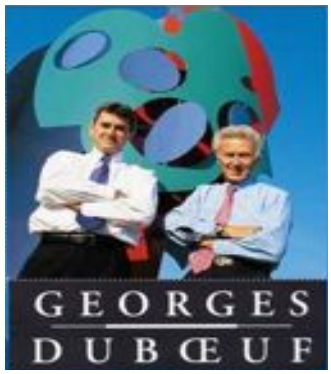
Visual Identity

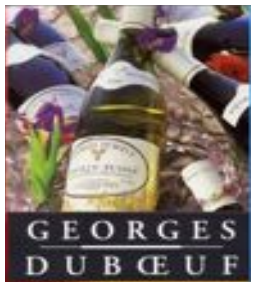
Winery's personality photography

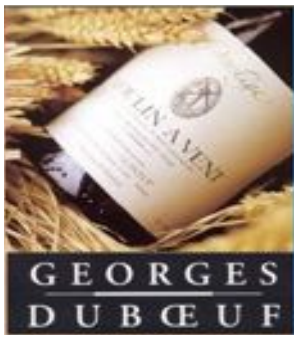
(key images tat describe the company's (winery) personality)











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Top 3 still light wine labels	
Fleur - Beaujolais	[Tag line]
Visual identity & Product imagery	
Nouvelle Generation - Beuajolais	[Tag line]
Visual identity & Product imagery	
Prestige- Beaujolais Villages	[Tag line]
Visual identity & Product imagery	

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La chasse du Pape

Tag line

The Art of Living in the Rhone Valley

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

La Chasse du Pape
Tradition [Tag line]

Visual identity & Product imagery

La Chasse du Pape
Prestige -Rouge [Tag line]

Visual identity & Product imagery

La chasse du Pape
Chardonnay-Viognier [Tag line]

Visual identity & Product imagery

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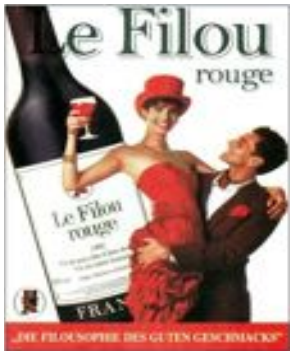
Le Filou

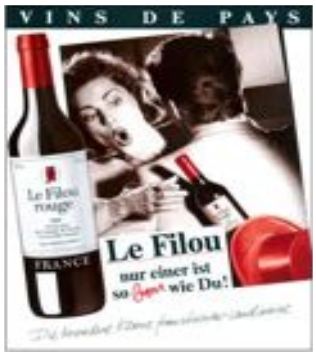
Tag line

Irresistibly French

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*





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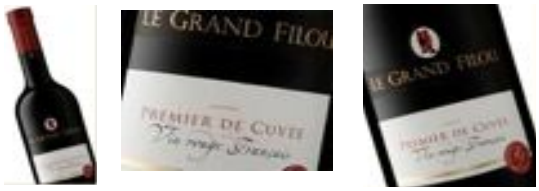
Top 3 still light wine labels

Le Filou Rouge [Tag line]

Le Filou Grand [Tag line]



Le Filou Blanc [Tag line]

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Louis Jadot

Tag line	Tag line
To produce wine which says the truth, is to respect the earth, is to respect the grapes- Produire du vin qui dit la verite c'est respecter la terre, c'est respecter les raisins	

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Louis Jadot Bourgogne Pinot Noir	[Tag line]
Visual identity & Product imagery	
Louis Jadot Puligny-Montrachet Clos de la Garenne	[Tag line]
Visual identity & Product imagery	
label	[Tag line]
Pouilly Fuissé Visual identity & Product imagery	

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Medinet

Tag line

The Star of the South

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Medinet Rouge [Tag line]

Visual identity & Product imagery

label [Tag line]

Visual identity & Product imagery

label [Tag line]

Visual identity & Product imagery

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Mouton Cadet

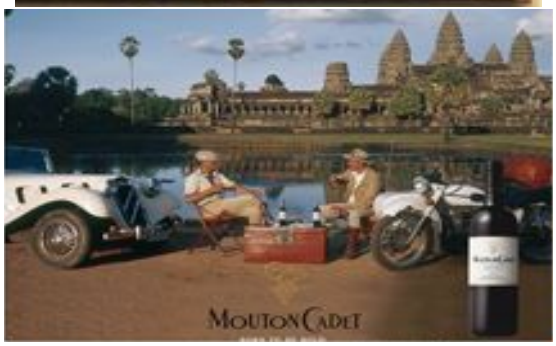
Tag line

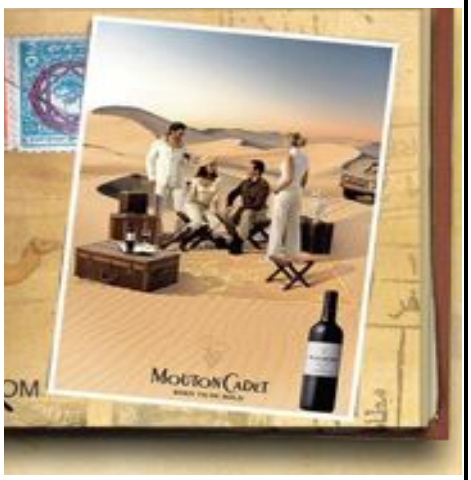
Born to be Bold

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)





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Top 3 still light wine labels	
Reserve Mouton Cadet Medoc	[Tag line]
Visual identity & Product imagery	
Reserve Mouton Cadet Sauternes	[Tag line]
Visual identity & Product imagery	
Mouton Cadet Bordeaux	[Tag line]
Visual identity & Product imagery	

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Vin de pays d'Oc

Tag line

South of France

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Cabernet Sauvignon [Tag line]	
Visual identity & Product imagery	
Merlot [Tag line]	
Visual identity & Product imagery	
label [Tag line]	
Visual identity & Product imagery	

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Piat d'Or

Tag line

Wine without the waffle

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels		
Merlot Shiraz	[Tag line]	
Visual identity & Product imagery		
Cabernet Chauvignon Shiraz	[Tag line]	
Visual identity & Product imagery		
French Dry White	[Tag line]	
Visual identity & Product imagery		

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Red Bicyclette

Tag line

The French wine that speaks your language

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	

Merlot	[Tag line]
Visual identity & Product imagery	

Syrah	[Tag line]
Visual identity & Product imagery	

Chardonnay	[Tag line]
Visual identity & Product imagery	

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

5. Country of origin: Germany

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Reh Kendermann (Black Tower)

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Reh Kendermann (Black Tower)

Top 3 still light wine labels		
lieblich	[Tag line]	
Visual identity & Product imagery		
Black Tower Pinot Grigio trocken	[Tag line]	
Visual identity & Product imagery		
Black Tower Rosé lieblich	[Tag line]	
Visual identity & Product imagery		

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Blue Nun

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

QUALITÄTSWEIN [Tag line]

Visual identity & Product imagery

BLUE NUN MERLOT [Tag line]

Visual identity & Product imagery

BLUE NUN SLINKY [Tag line]

Visual identity & Product imagery

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Dr Loosen

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Note: The corporate website does not present the wines. Instead it redirects to online shops.

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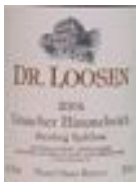
Top 3 still light wine labels	
Erdener Pralat	[Tag line]
Visual identity & Product imagery	
Riesling Auslese	[Tag line]
Visual identity & Product imagery	
Graacher Himmelreich	[Tag line]
Visual identity & Product imagery	

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Peter Mertes Winery

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

©2009 PRC Group - Critical Publics London - Altervision

Top 3 still light wine labels		
Rosé - trocken	[Tag line]	
Visual identity & Product imagery		
Villa Sittmann Riesling - lieblich	[Tag line]	
Visual identity & Product imagery		VILLA Sittmann
Rotwild Dornfelder Qualitätswein	[Tag line]	
Visual identity & Product imagery		ROTWILD WINE CELLARS

©2009 PRC Group - Critical Publics London - Altervision

Leonard Kreusch Wines

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Note: The corporate website does not present the wines.

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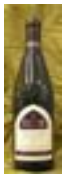
Top 3 still light wine labels		
Piesporter	[Tag line]	
Visual identity & Product imagery		
Twisted River Riesling	[Tag line]	
Visual identity & Product imagery		
Leonard Kreusch Rheinhessen Kabinett	[Tag line]	
Visual identity & Product imagery		

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

6. Country of origin: Italy

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Antinori

Tag line

26 Generations

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Solaia	[Tag line]	
Visual identity & Product imagery		
Tignanello	[Tag line]	
Visual identity & Product imagery		
Badia a Passignaro Riserva	[Tag line]	
Visual identity & Product imagery		

©2009 PRC Group - Critical Publics London - Altervision

Marcarini

Tag line

A modern yet traditional winery

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels						
label	[Tag line]					
Visual identity & Product imagery						
label	[Tag line]					
Visual identity & Product imagery						
label	[Tag line]					
Visual identity & Product imagery						

©2009 PRC Group - Critical Publics London - Altervision

Bella Serra

Tag line

It's going to be a beautiful evening

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Pinoy Grigio [Tag line]

Visual identity & Product imagery

Rosato [Tag line]

Visual identity & Product imagery

Merlot [Tag line]

Visual identity & Product imagery

©2009 PRC Group - Critical Publics London - Altervision

Casa Girelli

Tag line

Wine and Tradition

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels		
Virtuoso - Chardonnay Trentino DOC	[Tag line]	
Visual identity & Product imagery		
Canaletto Primitivo di Puglia IGT	Authentic Italian	
Visual identity & Product imagery		
Virtuoso Syrah di Sicilia	[Tag line]	
Visual identity & Product imagery		

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Canti

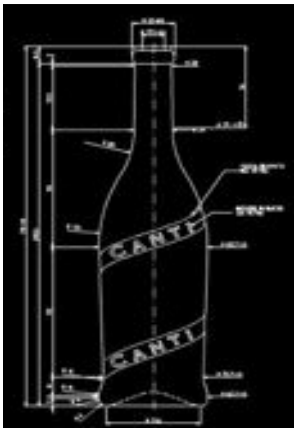
Tag line

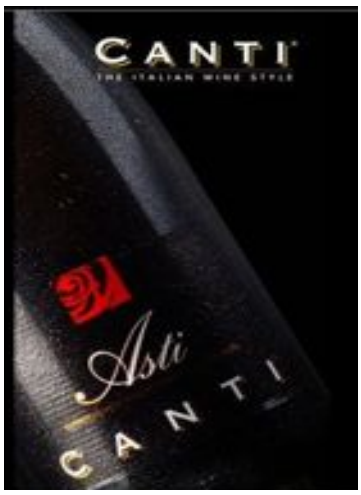
The Italian Wine Style

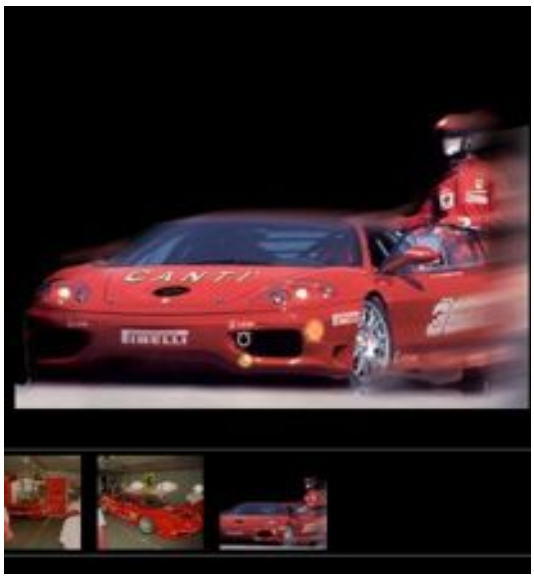
Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)







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Top 3 still light wine labels		
Classic Merlot-Sangiovese	[Tag line]	
Visual identity & Product imagery		
Premium Pinot-Grigio	[Tag line]	
Visual identity & Product imagery		
Premium Merlot	[Tag line]	
Visual identity & Product imagery		

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Casarsa

Tag line

wine group

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Casarsa Merlot [Tag line]

Visual identity & Product imagery

Casarsa Chardonnay [Tag line]

Visual identity & Product imagery

Casarsa Pinot Grigio [Tag line]

Visual identity & Product imagery

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Cavit

Tag line

Enthusiasm for the territory- Il gusto per Il territorio

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Bottega Vinai Pinot Grigio [Tag line]	
Visual identity & Product imagery	
Novello Terrazze della Luna - I Novelli [Tag line]	
Visual identity & Product imagery	
Bottega Vinai-Teroldego Rotaliano [Tag line]	
Visual identity & Product imagery	

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Citra

Tag line

Wines of character

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Ortense Montepulciano D'Abruzzo	[Tag line]
Visual identity & Product imagery	
Laus Vitae Montepulciano D'Abruzzo DOC	[Tag line]
Visual identity & Product imagery	
Ortense White Table	[Tag line]
Visual identity & Product imagery	

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Ecco Domani

Tag line

Liquid Style

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Pinot Griggio	[Tag line]	
Visual identity & Product imagery		
Merlot	[Tag line]	
Visual identity & Product imagery		
Chiandi	[Tag line]	
Visual identity & Product imagery		

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Fiordaliso

Tag line

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*

Top 3 still light wine labels

Pinot Grigio [Tag line]

Visual identity & Product imagery

Moscato D'Asti [Tag line]

Visual identity & Product imagery

label [Tag line]

Visual identity & Product imagery

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Folonari

Tag line

Father and Son ???

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	

Nozzole Chiandi Classico [Tag line]

Visual identity & Product imagery

Cabreo il Borgo [Tag line]

Visual identity & Product imagery

Campo al Mare Bolgheri [Tag line]

Visual identity & Product imagery

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La Gioiosa

Tag line

La Gioiosa et amorosa

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
La Gioiosa Prosecco Spumante	[Tag line]
Visual identity & Product imagery	
La Gioiosa Merlot	[Tag line]
Visual identity & Product imagery	
La Gioiosa Pinot Grigio	[Tag line]
Visual identity & Product imagery	

©2009 PRC Group - Critical Publics London - Altervision

Cantina Lamberti

Tag line

Ride the wave Lamberti

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Pinot Grigio	[Tag line]
Visual identity & Product imagery	
Valpolicella Ripasso	[Tag line]
Visual identity & Product imagery	
Amarone	[Tag line]
Visual identity & Product imagery	

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Luna Di Luna

Tag line

The Perfest Blends

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Shiraz Merlot	[Tag line]
Visual identity & Product imagery	
Merlot Cabernet	[Tag line]
Visual identity & Product imagery	
Sangiovese Merlot	[Tag line]
Visual identity & Product imagery	

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Ruffino

Tag line

Since 1877

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Riserva Ducale Oro [Tag line]

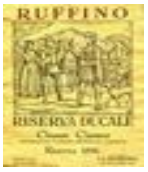
Visual identity & Product imagery

Libaio Chardonnay [Tag line]

Visual identity & Product imagery

Ruffino Chianti [Tag line]

Visual identity & Product imagery



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Santa Margherita

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Pinot Grigio	[Tag line]
Visual identity & Product imagery	
Chardonnay Trentino	[Tag line]
Visual identity & Product imagery	
Malbech Veneto Orientale	[Tag line]
Visual identity & Product imagery	

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Viala

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

label [Tag line]

Visual identity & Product imagery

label [Tag line]

Visual identity & Product imagery

label [Tag line]

Visual identity & Product imagery

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Castello Banfi

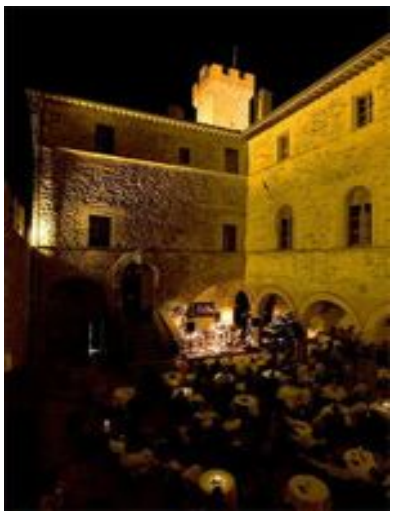
Tag line

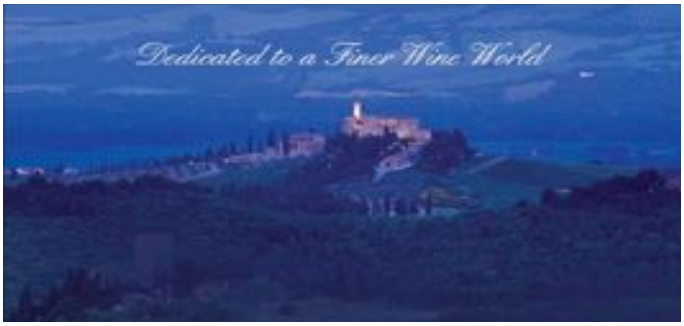
Dedicated to a finer wine world

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)





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Top 3 still light wine labels

Brunello di Montalcino [Tag line]

Visual identity & Product imagery

ExcelsuS Sant' Antimo [Tag line]

Visual identity & Product imagery

SummuS Sant' Antimo [Tag line]

Visual identity & Product imagery

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

7. Country of origin: New Zealand

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Montana

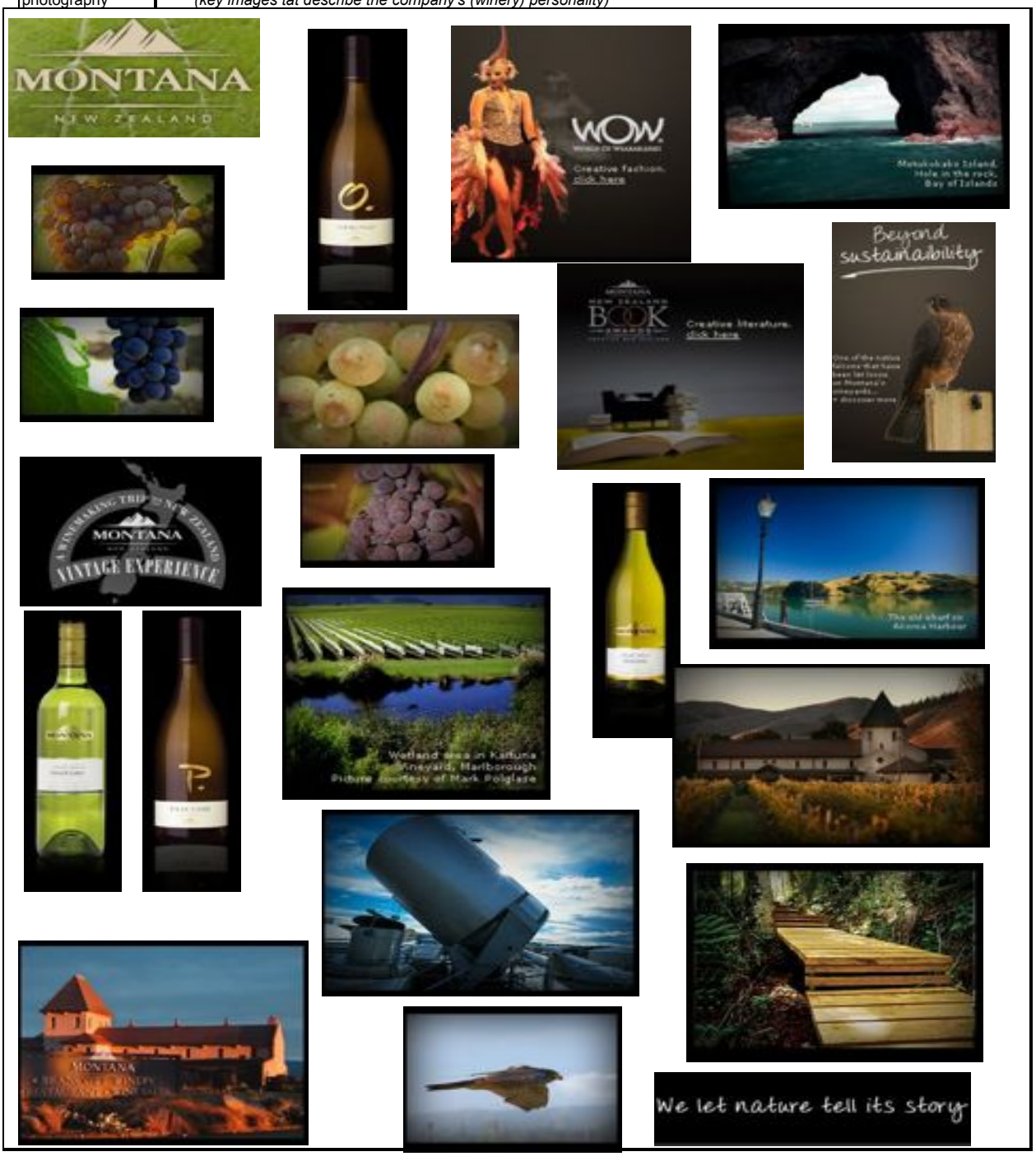
Tag line

We let nature tell its story

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels

Hawke's Bay Merlot Cabernet Sauvignon	Classic wines that let the grape varieties express themselves
Visual identity & Product imagery	
Montana Ormond 'O' Gisborne Chardonnay	Wines that embody the fine art of the winemaker
Visual identity & Product imagery	
Montana Terraces 'T' Marlborough Pinot Noir	Wines that embody the fine art of the winemaker
Visual identity & Product imagery	

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Oyster bay

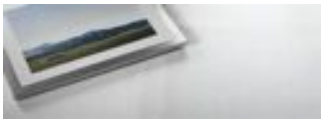
Tag line

Sometimes the world really is your oyster

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels

Merlot	No Tag Line
Visual identity & Product imagery	
Sauvignon Blanc	No Tag Line
Visual identity & Product imagery	
Chardonnay	No Tag Line
Visual identity & Product imagery	

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Villa Maria

Tag line

Passionate About Quality

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Villa Maria Estate's Cellar Selection Syrah 2005	No Tag Line
Visual identity & Product imagery	
Villa Maria Cellar Selection Sauvignon Blanc	No Tag Line
Visual identity & Product imagery	
Marlborough Chardonnay	No Tag Line
Visual identity & Product imagery	

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Kim Crawford

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels		
Marlborough Sauvignon Blanc	No Tag Line	
Visual identity & Product imagery		
Marlborough Unoaked Chardonnay	No Tag Line	
Visual identity & Product imagery		
Pinot Noir Marlborough	No Tag Line	
Visual identity & Product imagery		

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Nobilo

Tag line

Pure New Zealand Pure Nobilo

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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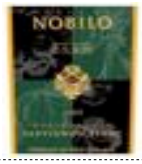
Top 3 still light wine labels		
Sauvignon Blanc	No Tag Line	
Visual identity & Product imagery		ICON
Marborough Sauvignon Blanc	No Tag Line	
Visual identity & Product imagery		NOBILO / NOBILO REGIONAL COLLECTION
East Coast Chardonnay	No Tag Line	
Visual identity & Product imagery		NOBILO REGIONAL COLLECTION / NOBILO

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Cloudy Bay

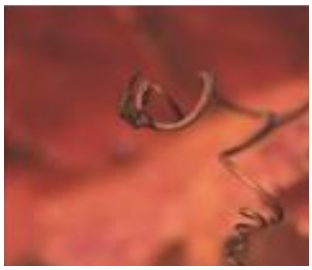
Tag line

Capturing The Essence

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels		
Sauvignon Blanc	Cloudy bay is sunonymous with Sauvignon Blanc	
Visual identity & Product imagery		
Chardonnay	No Tag Line	
Visual identity & Product imagery		
Pinot Noir	No Tag Line	
Visual identity & Product imagery		

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

8. Country of origin: Portugal

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J. M. da Fonseca (Lancers)

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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J. M. da Fonseca (Lancers)

Top 3 still light wine labels

Lancer Rose	Anytime, Anywhere
Visual identity & Product imagery	
Lancer White	Anytime, Anywhere
Visual identity & Product imagery	
Lancer Sparkling	[Tag line]
Visual identity & Product imagery	

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Sogrape Vinhos - Mateus

Tag line

Wines of passion

SOGRAPE VINHOS
"Só de um grande amor nascem grandes vinhos"
"Wines of passion"

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Mateus Rose	Taste Matters
Visual identity & Product imagery	

Mateus Rose Sparkling	[Tag line]
Visual identity & Product imagery	

Mateus White	[Tag line]
Visual identity & Product imagery	

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Sogrape Vinhos - Except Mateus

Tag line

Wines of passion

SOGRAPE VINHOS
"Si de um grande amor nascem grandes vinhos"
"Wines of passion"

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Grao Vasco Dao Red	[Tag line]
Visual identity & Product imagery	
Barca Velha Red	[Tag line]
Visual identity & Product imagery	
Offley Boa Vista	[Tag line]
Visual identity & Product imagery	

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

9. Country of origin: South Africa

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Kumala

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels		
Couloumbard Chardonnay	[Tag line]	
Visual identity & Product imagery		
Cabernet Sauvignon Shiraz	[Tag line]	
Visual identity & Product imagery		
Shiraz	[Tag line]	
Visual identity & Product imagery		

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First Cape

Tag line

First Choice, First Family, First Place, First Hand, First Time

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Shiraz	No Tag Line
Visual identity & Product imagery	
Chardonnay	No Tag Line
Visual identity & Product imagery	
Café Collection	No Tag Line
Visual identity & Product imagery	

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Namaqua

Tag line

We invite you to experience nature's secret ingredient – the spirit of the region abounds in every drop.

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels		
Rain Dance - Blanc de Blanc	No Tag Line	
Visual identity & Product imagery		
Shiraz Marlot	No Tag Line	
Visual identity & Product imagery		
Chardonnay Colombard	No Tag Line	
Visual identity & Product imagery		

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KWV

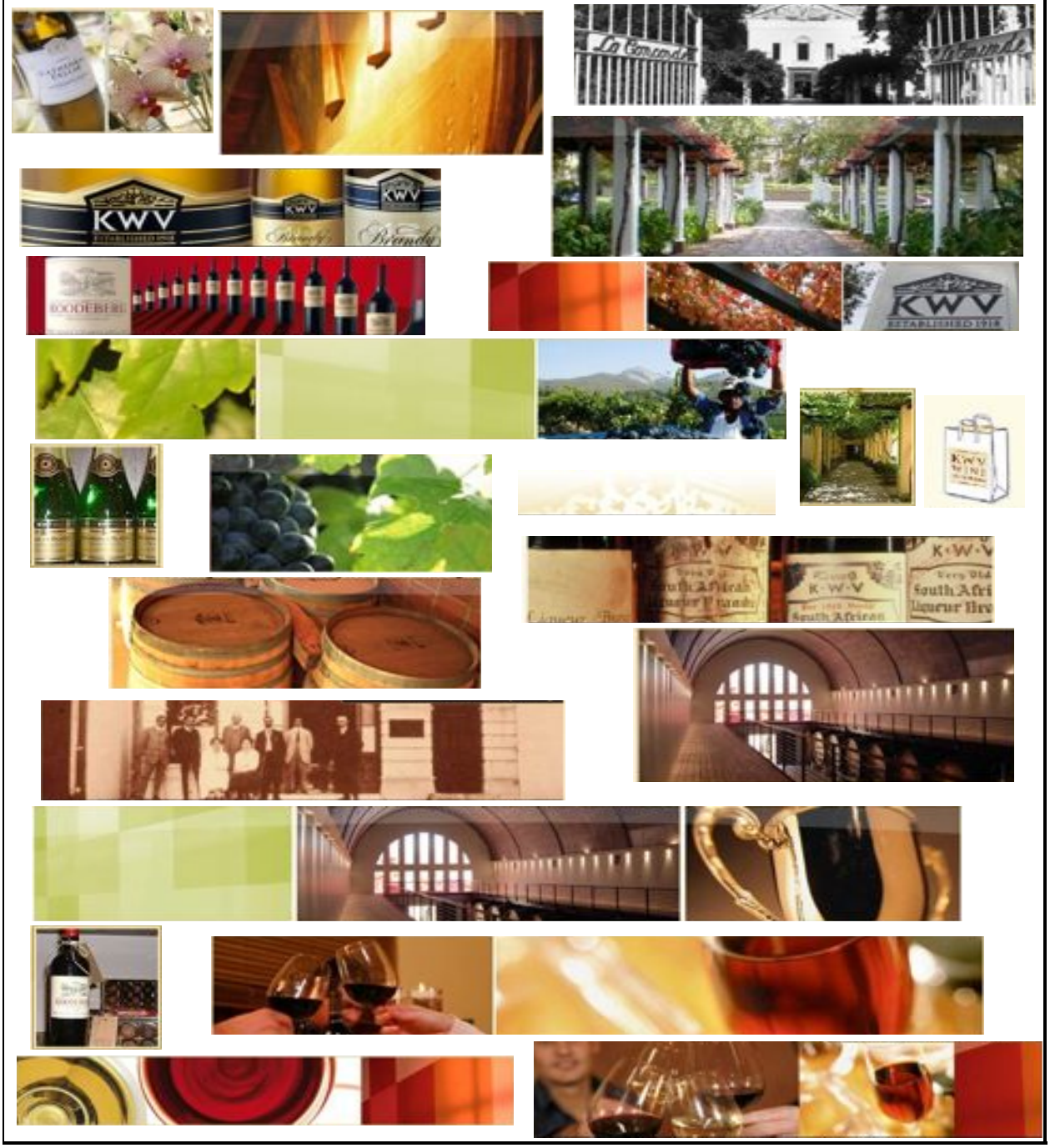
Tag line

90 Years of Heritage

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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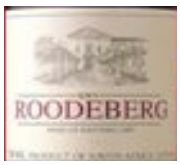
Top 3 still light wine labels		
Cathedral Cellar	the true synthesis of an Old World and a New World style of winemaking	
Visual identity & Product imagery		
Roodberg	Comfortable in any company	
Visual identity & Product imagery		
Perold	Understated excellence	
Visual identity & Product imagery		

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Two Oceans

Tag line

Cruising Two Oceans

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Sauvignon Blanc	No Tag Line
Visual identity & Product imagery	
Cabernet Sauvignon Merlot	No Tag Line
Visual identity & Product imagery	
Shiraz	No Tag Line
Visual identity & Product imagery	

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

10. Country of origin: Spain

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Bodegas Faustino

Tag line

The 4th Generation

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Bodegas Faustino

Top 3 still light wine labels

Faustino I Grand Reserva	[Tag line]	
Visual identity & Product imagery		
Faustino V Barrel Fermented White	[Tag line]	
Visual identity & Product imagery		
Cava Brut Reserva	[Tag line]	
Visual identity & Product imagery		

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Campo Viejo

Tag line

Like no other

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Crianza	[Tag line]
Visual identity & Product imagery	
Viura	[Tag line]
Visual identity & Product imagery	
Grand Reserva	[Tag line]
Visual identity & Product imagery	

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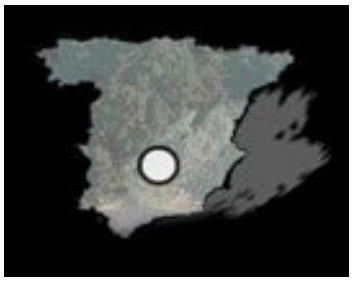
Bodegas Real

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels		
Vega Ibor	[Tag line]	
Visual identity & Product imagery		
Finca Marisánchez	[Tag line]	
Visual identity & Product imagery		
Palacio de Ibor	[Tag line]	
Visual identity & Product imagery		

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La Rioja Alta

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Grand Reserva 890 [Tag line]

Visual identity & Product imagery

Grand Reserva 904 [Tag line]

Visual identity & Product imagery

Vina Ardanza [Tag line]

Visual identity & Product imagery

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Marques de Caceres

Tag line

A Higher Form of Excellence

Marqués de Cáceres

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

MC	[Tag line]	
Visual identity & Product imagery		
Grand Reserva	[Tag line]	
Visual identity & Product imagery		
Blanco Joven	[Tag line]	
Visual identity & Product imagery		

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Freixenet - Mederano

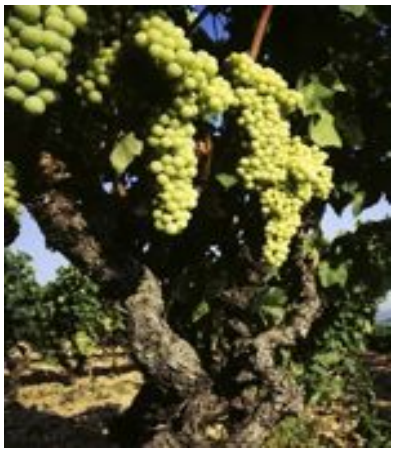
Tag line

Vinos de Espana

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels		
Mederano Tinto	[Tag line]	
Visual identity & Product imagery		
Premium Linie Rioja	[Tag line]	
Visual identity & Product imagery		
Mederano Blanco	[Tag line]	
Visual identity & Product imagery		

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Torres

Tag line

Fine wine born and raised at home

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Mas La Plana	[Tag line]	
Visual identity & Product imagery		
Mas Borrás	[Tag line]	
Visual identity & Product imagery		
Grans Muralles	[Tag line]	
Visual identity & Product imagery		

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Vinos de Telmo Rodriguez

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Dehesa Gago 2007	No Tag Line
Visual identity & Product imagery	
Basa 2007	No Tag Line
Visual identity & Product imagery	
Almuverde 2007	No Tag Line
Visual identity & Product imagery	

©2009 PRC Group - Critical Publics London - Altervision

Vega Sicilia

Tag line

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*

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Top 3 still light wine labels		
Reserva Especial	[Tag line]	
Visual identity & Product imagery		
Vega Sicilia Unico Gran Reserva	[Tag line]	
Visual identity & Product imagery		
Valbuena 5°	[Tag line]	
Visual identity & Product imagery		

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Appendix A:
Brand analysis profiles for top-selling producer brands in reference country-markets

111. Country of origin: USA

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Barefoot Wines

Tag line

Wine & Bubbly

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Brut Cuve	Barefoot Bubbly Brut Cuve
Visual identity & Product imagery	
Pinot Grigio	Barefoot Pinot Grigio
Visual identity & Product imagery	
White Zinfandel	Barefoot Wine Zinfandel
Visual identity & Product imagery	

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Beaulieu Vineyard Since 1900

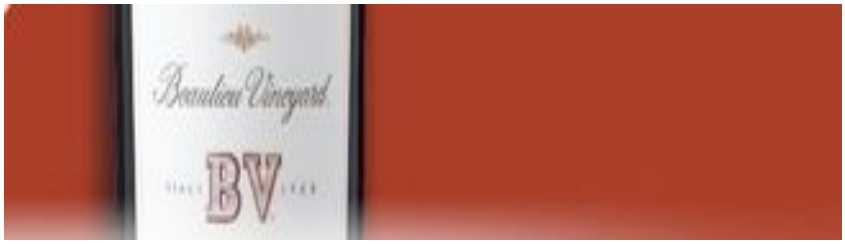
Tag line

For more than 100 years, Beaulieu Vineyard has set the standard for crafting California wines that stand among the world's finest.

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



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Top 3 still light wine labels

label	George De Latour Private Reserve
Visual identity & Product imagery	
Tapestry	BV Reserve Tapestry Napa Valey
Visual identity & Product imagery	
Dulcet	BV Dulcet Reserve Napa Valey
Visual identity & Product imagery	

©2009 PRC Group - Critical Publics London - Altervision

Beringer Since 1876

Tag line

Time Honored Tradition

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Sauvignon Blanc — Sauvignon Blanc Napa Valley

Visual identity & Product imagery

Cabernet Sauvignon — 2002 Private Reserve Cabernet Sauvignon

Visual identity & Product imagery

Riesling — 2006 Founders' Estate Riesling, California

Visual identity & Product imagery

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Blossom Hill

Tag line

release the taste

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels	
Pinot Grigio	Pinot Grigio Chardonay - crisp and dry with pear aromas and a hint of citrus
Visual identity & Product imagery	
Shiraz Rose	Shiraz Rose - dry and crisp with fresh ripe cranberry aromas
Visual identity & Product imagery	
Chardonnay	Chardonnay mellons and apples with a hint of smooth vanilla
Visual identity & Product imagery	

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Clos du Bois

Tag line

Good friends good cheer nice nose

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Cabernet Sauvignon	Cabernet Sauvignon
Visual identity & Product imagery	
Chardonnay	Classic Sonoma County Chardonnay
Visual identity & Product imagery	
Pinot Grigio	Pinot Grigio
Visual identity & Product imagery	

©2009 PRC Group - Critical Publics London - Altervision

Echo Falls

Tag line

A wine to relax with

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

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Top 3 still light wine labels

Pinot Grigio	Pinot Grigio Blush - Relax you have choosen the perfect wine
Visual identity & Product imagery	
Chardonnay	Chardonnay - Relax you have choosen the perfect wine
Visual identity & Product imagery	
California White	California White - Relax you have choosen the perfect wine
Visual identity & Product imagery	

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Franzia - Since 1900 - Worlds most popular wine

Tag line

Over 100 years of winemaking - Worls most popular wine

Visual Identity

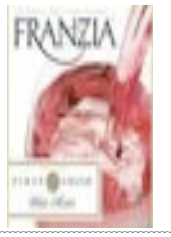
Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

White Merlot — White Merlot - First Crush

Visual identity & Product imagery



Chardonnay — Chardonnay Vintner Select

Visual identity & Product imagery

Crisp White — Crisp White - House wine favourites

Visual identity & Product imagery

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EJ Gallo

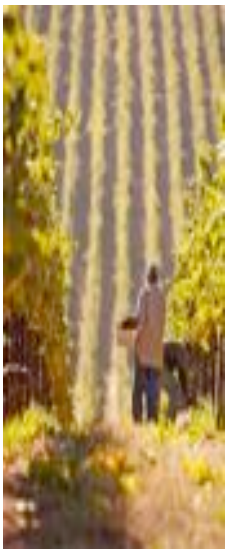
Tag line

celebrating 75 years of family winemaking

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)



Top 3 still light wine labels

Louis Martini — [Tag line]

Visual identity & Product imagery

Marcelina — [Tag line]

Visual identity & Product imagery

William Hill Estate — [Tag line]

Visual identity & Product imagery

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Gallo Sanoma

Tag line

Discover 75 years of our family winemaking

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Chardonnay [Tag line]

Cabernet Sauvignon [Tag line]

Visual identity & Product imagery

Moscato [Tag line]

Visual identity & Product imagery

©2009 PRC Group - Critical Publics London - Altervision

Josheph Phelps

Tag line

excellence from the ground up

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*

Top 3 still light wine labels

label Cabenet Sauvignon

Visual identity & Product imagery

label Fog dog Pinot noir

Visual identity & Product imagery

label Merlot

©2009 PRC Group - Critical Publics London - Altervision

Kendall Jackson

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Vintner's Reserve Meritage Red	From the cool coastal vineyards of California Vinter's Reserve represents our commitment to "jackson Estates Grown" winemaking

Visual identity & Product imagery

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Chardonnay	Grown" winemaking
Visual identity & Product imagery	
Grand Reserve Sauvignon Blanc	Grand Reserve wines are crafted from 100% estate grown vineyards along the cool california coastal winegrowing region
Visual identity & Product imagery	

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Opus One

Tag line

Visual Identity

Winery's personality photography *(key images tat describe the company's (winery) personality)*

Top 3 still light wine labels

1980 Opus One
Proprietary Red Wine
Proprietary Blend [Tag line]

Visual identity & Product imagery

2005 Opus One
Proprietary Napa Valley [Tag line]

Visual identity & Product imagery

1992 Opus One Napa
Proprietary Red [Tag line]

Visual identity & Product imagery

©2009 PRC Group - Critical Publics London - Altervision

RIDGE 2006 California Lytton Springs

Tag line

Tradition Quality Innovation

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

©2009 PRC Group - Critical Publics London - Altervision

Top 3 still light wine labels	
Monte Bello	
Visual identity & Product imagery	
Santa Cruz Mountains	[Tag line]
Visual identity & Product imagery	
Chardonnay Santa Cruz Mtns Estate	[Tag line]
Visual identity & Product imagery	

©2009 PRC Group - Critical Publics London - Altervision

Robert Mondavi Winery

Tag line

a symbol of Napa valley since 1966

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Napa Valley [Tag line]

Visual identity & Product imagery

Cabernet Sauvignon [Tag line]

Visual identity & Product imagery

Chardonee Reserve [Tag line]

Visual identity & Product imagery

©2009 PRC Group - Critical Publics London - Altervision

Smoking Loon

Tag line

Be your own loon

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Pinot Grigio [Tag line]

Cabernet Sauvignon [Tag line]

Chardonnay [Tag line]

©2009 PRC Group - Critical Publics London - Altervision

Sterling Vineyards

Tag line

For wine lovers with impeccable taste

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Organic Chardonnay [Tag line]

Visual identity & Product imagery

Napa Valley Chardonnay [Tag line]

Visual identity & Product imagery

Reserve Merlot [Tag line]

©2009 PRC Group - Critical Publics London - Altervision

Sutter Home

Tag line

Family Vineyards Since 1890

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

Pinot Grigio [Tag line]

Chardonnay [Tag line]

Moscato [Tag line]

©2009 PRC Group - Critical Publics London - Altervision

Turning Leaf

Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)

Top 3 still light wine labels

pinot grigio — [Tag line]

riesling — [Tag line]

sauvignon blanc — [Tag line]

©2009 PRC Group - Critical Publics London - Altervision

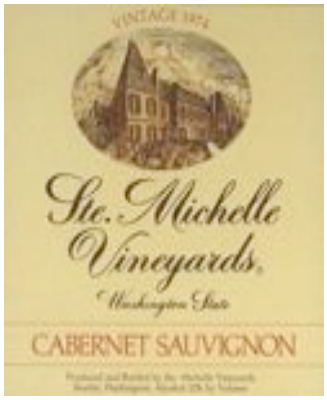
Chateau ste Michelle

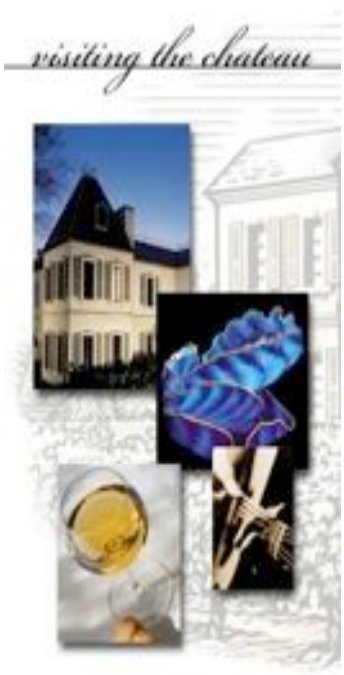
Tag line

Visual Identity

Winery's personality photography

(key images tat describe the company's (winery) personality)





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Chateau Ste Michelle

Top 3 still light wine labels

label	Chateau ste Michelle Cold Creek Riesling
Visual identity & Product imagery	

label	Ethos Chardonnay
Visual identity & Product imagery	

label	Eroica Riesling
Visual identity & Product imagery	

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Appendix B

Top urban centres – creative cities

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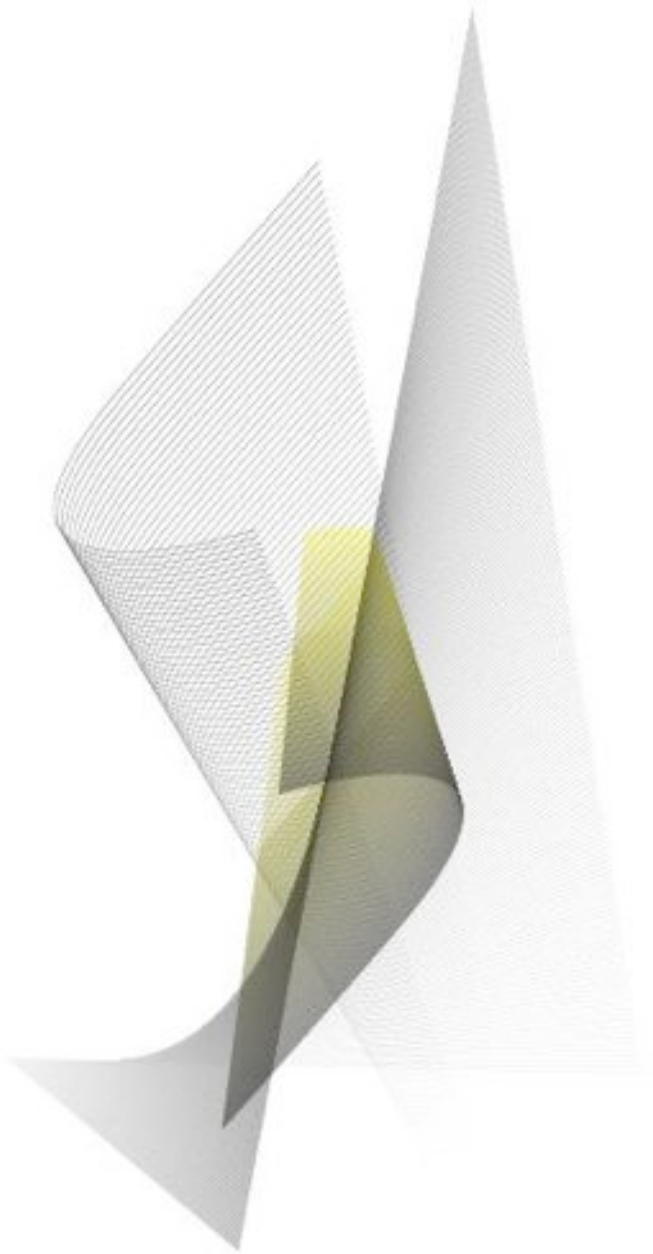
Top Urban Centres – Creative Cities

Russia, China, Canada, USA, Germany, UK

created:

04.09.08



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Russia [1] [2] [3]

Russia has 18 cities with populations of 1 million or more, yet rarely is thought beyond Moscow or St. Petersburg as Russian major cities.

It is found that one to ten cities in the UK, Poland, the Czech Republic, Hungary, Slovakia, Slovenia, Ukraine, Sweden, Norway, Denmark, Finland, Estonia, Latvia, Lithuania and **Russia** that have the potential to become creative cities.

According to the Federal State Statistics Service [4] major cities according to geographical distribution are the following:

Federal District	**Centre city**	**Population thou. persons**
Central	Moscow	8,305
North West	St. Petersburg	4,628
Siberian	Novosibirsk	1,393
Privolzhsky (Volga)	Nizhny Novgorod	1,343
South	Rostov-on-Don	-
Urals	Ekaterinburg	-
Far East	Khabarovsk	-

[1] **Connect2Edmonton:** ***Busy and Authentic - Edmonton's Creative City Initiative*** – 19.01.07
[2] **British Council:** ***The Future City Game in Pilsen***
[3] **Federal State Statistics Service**
[4] **Federal State Statistics Service:** ***The Federal Districts of the Russian Federation –*** 2002

Moscow [5] [6]

Moscow occupies a prime position within Russia. In addition to the functions of a capital city and cultural functions, Moscow also is the centre of Russians economic power and financial capital. There is where the distribution of investment is decided.

Besides the state, the most important economic decision makers, such as banks, economic concerns, industrial finance groups, have their headquarters in Moscow. The regional and local investors are as a rule closely linked to them.

Generally it is to be observed that the influence of Moscow on plans and decisions in the regions is as before very large, because the prominent state institutions, the central scientific research institutes, the independent commissions of experts or the consulting firms in the government and in economic structures are found in Moscow and still have the key role in working out the significant planning projects. For the production of regional and urban planning there are in principle only the planning institutes in Moscow and St. Petersburg.

The intensity of Moscow's economy and the stagnation in the rest of the [Russian] economy are related. Despite having a population that is, by world standards, highly educated, the Russian economy is being held back by an apparent skill shortage.

St. Petersburg [7] [8] [9]

The post-Soviet development of St. Petersburg was largely framed by changes in its geopolitical position, which led this city to become again an important gateway from Russia to Western Europe.

St. Petersburg is characterised and mentioned as **"The Venice of the North"** with a history of 300 years. Buildings have been restored, the local infrastructure improved, and special art and history exhibitions organised.

St. Petersburg's architecture is distinct, with many museums and theatrical performances. The city, built on 42 islands connected by 340 bridges, is one

[5] **Institute of Regional Geography:** ***Evaluation of the Development Potential of Russian Cities*** – 01.08.01
[6] **US News:** ***Why Moscow Has Rock-Bottom Unemployment*** – 21.07.08
[7] **Business Week:** ***St. Petersburg: Winter Wonder*** – 22.09.03
[8] **Financial Times:** ***The Fountain of Bakhchisarai, Mariinsky Theatre, St Petersburg*** – 02.06.08
[9] **Financial Times:** ***UK architect to design St Petersburg Gazprom HQ*** – 02.12.06

of the most interesting in the world. Peter the Great and his descendants made sure it would rival the great cosmopolitan centres of the West.

Famous architects, such as the Italian Bartolomeo Rastrelli (who designed the Winter Palace) and the Frenchman Ricard de Montferrand (St. Isaac's Cathedral), were hired to construct landmark buildings. Most of them survived 70 years of communism and the devastating 900-day German bombardment during World War II. No high-rises were allowed to be built in the centre, so one can observe clearly the city's buildings.

China

In most advanced countries of the world a large part of their population belongs to the middle and upper class. This is not the case in China where the communist government was founded on the principle of abolishing class differences. According to the Chinese Academy of Social Sciences, managers, professionals, skilled technicians and service workers earning $2,500 to $10,000 a year each are less than 5% of the total population. The creative class in China is just emerging in the large cities of the country. This class prefers cities with high investments (in the case of China foreign investments) and a higher quality of life. Foreign investments also mean contact with the western culture and increased wages. Also tourism can have a positive effect in a city. The cities below have the highest possibility to become creative hubs in China.

Shanghai [10] [11] [12]

Shanghai is the largest city in China in terms of population and one of the largest urban areas in the world, with over 20 million people in its extended metropolitan area. According to the annual ranking of competitiveness published by the Chinese Academy of Social Sciences (2005) Shanghai dominated the comprehensive competitiveness list, scoring the highest marks in capital, infrastructure, location, culture and governance. Shanghai is also the best place in mainland China for doing business, according to the Economist Intelligence Unit. Shanghai tops an overall ranking of 44 Chinese cities that were compared in five key areas—economic performance, market opportunities, labour market, infrastructure and environment. The city attracts many foreign investors and is among the 20 top cities in the world according to the FDI magazine. GDP per capita reached 5,792 Euros in 2006.

[10] **ChinaDaily:** ***Beijing slips in mainland top city ranking***- 17.03.05

[11] **FDI:** ***FDI's Top 20 Expat*** - 02.09.08

[12] **Economist:** ***Chinese city rankings*** - 02.09.08

Suzhou [13] [14]

Suzhou is a city on the lower reaches of the Yangtze River 80 kilometres west of Shanghai having a population of approximately 2.5 million. The city is a tourist attraction in China because of the gardens and pagoda's and is developing a promising hi-tech industry. In 1981, this ancient city was listed by the State Council as one of the cities where the protection of historical and cultural heritage as well as natural scenery should be treated as a priority project. Since then, with suburban economic projects, Suzhou has developed into one of the most prosperous cities in China. Suzhou was the top ranking Chinese city for foreign investors according to a study of the Chinese Academy of Social Sciences and China Business News. (2006) Major criteria included the amount of foreign investment the city absorbed since 2003; the proportion of foreign investment in the city's total investment; and its average annual growth of foreign investment in the past three years. According to the Economist Intelligence Unit Suzhou takes the 11th place among the best cities in China for doing Business. GDP per capita reached 6,745 Euros in 2004.

Chengdu [15] [16] [17]

Chengdu located in southwest People's Republic of China, is the capital of Sichuan province and a sub-provincial city. Chengdu is also one of the most important economic centres and transportation and communication hubs in South-western China. According to the 2007 Public Appraisal for Best Chinese Cities for Investment, Chengdu was chosen as one of the top ten cities to invest in, out of a total of 280 urban centres. According to the Economist Intelligence Unit Suzhou takes the 13th place among the best cities in China for doing Business. It was one of the three cities - along with Hangzhou and Dalian - to receive the title of China's Best Tourism City awarded by the National Tourism Administration and the World Tourism Organization. In 2005, Chengdu received the title of "Model City of Environmental Protection" from the central government. The city has a population of 10.5 million and the GDP per capita reached 3,240 Euros in 2007.

[13] **China Law and Practice:** ***Suzhou tops rankings on foreign investment in China*** - 10.06

[14] **Economist:** ***Chinese city rankings*** - 02.09.08

[15] **Economist:** ***Chinese city rankings*** - 02.09.08

[16] **Allroadsleadtochina.com:** ***Chengdu's June News*** - 07.07

[17] **ChinaDaily:** ***Chengdu's relaxed, alluring lifestyle*** – 01.09.08

Guangzhou [18] [19]

Guangzhou is the capital of Guangdong Province in the southern part of the People's Republic of China. It is a port on the Pearl River, and is located about 120 km northwest of Hong Kong. The city has a population of 12.5 million and is the second best city in China for foreign investments according to the Economist Intelligence Unit. Guangzhou is the economic centre of the Pearl River Delta, one of mainland China's leading commercial and manufacturing regions and holds the China Import and Export Fair. The city has one of the highest GDP per capita in the country, which reached 8,590 Euros in 2007. Strong employment growth, particularly in the services industries, has boosted wages and GDP per capita, both of which have increased by over 60% between 2000 and 2004, helping the creation of a middle class in the city.

Beijing [20] [21]

Beijing is the capital of the People's Republic of China and the second largest city, after Shanghai. It is a major transportation hub, with dozens of railways, roads and motorways passing through the city. Beijing is the third best city in China for foreign investments according to the Economist Intelligence Unit. The city hosts 15 of the Fortune 500 companies with revenues over 520 billion dollars in 2006. Beijing still has many infrastructure problems but managed to host successfully the 2008 Olympics. The city has a population of 17.2 million and the GDP per capita reached 4,997 Euros in 2006.

[18] **Economist:** ***Chinese city rankings*** - 02.09.08

[19] **Jones Lang LaSalle:** ***Guangzhou*** – 16.01.06

[20] **Economist:** ***Chinese city rankings*** - 02.09.08

[21] **money.cnn.com:** ***Fortune 500*** - 2006

Canada

Toronto – Ontario [22]

Toronto is the largest urban centre of Canada with 5.113.149 inhabitants. Among the population over 15 years old (4.122 million) 3.31 million have gained some type of education. Almost 1.1 million has a university degree, which corresponds to 25% of total (over 15), while another 658.000 holds a college degree. Approximately 2 million inhabitants hold a higher education degree which corresponds to a 48% of the total population (over 15). Almost 2.251 million inhabitants – 56% of the total population over 15 years – holds degrees from social sciences, business - management sciences, architecture – engineering, health sciences, as well as from other sciences. The most popular occupations are management, business, finance, social sciences, trade and sales occupations which occupy 2.533 million persons, an approximate 50% of the total population.

Montreal – Quebec [23]

Montreal, the second largest urban centre, has 3.635.571 inhabitants. Among the population over 15 years old (1.538 million) 1.2 million have gained some type of education. Almost 398.000 hold a university degree, which corresponds to 27% of total (over 15), while another 235.000 holds a college degree. Approximately 635.000 inhabitants hold a higher education degree which corresponds to a 42.5% of the total population (over 15).

Almost 874.000 inhabitants – 57% of the total population over 15 years – holds degrees from social sciences, humanities, business - management sciences, architecture – engineering, health sciences, as well as from other sciences. The most popular occupations are management, business, finance, social sciences, trade and sales occupations which occupy 832.000 million persons, an approximate 52% of the total population.

[22] **Canadian Statistics Service**
[23] **Canadian Statistics Service**

Vancouver - British Columbia [24]

Vancouver, the third largest urban centre, has 2,116,581 inhabitants. Among the population over 15 years old (1.752 million) 1.45 million have gained some type of education. Almost 432.000 hold a university degree, which corresponds to 24.5% of total (over 15), while another 282.000 holds a college degree. Approximately 823.000 inhabitants hold a higher education degree which corresponds to a 47% of the total population (over 15).

Almost 976.000 inhabitants – 56% of the total population over 15 years – holds degrees from social sciences, business - management sciences, architecture – engineering, health sciences, as well as from other sciences. The most popular occupations are management, business, finance, social sciences, trade and sales occupations which occupy 971.000 million persons, an approximate 46% of the total population.

More Canadians prefer to live in towns and cities [25]

Canada's urbanization is continuing. In 2001, 79.4 per cent of Canadians lived in an urban centre of 10,000 people or more, compared with 78.5 per cent in 1996. Outside the urban centres, the population of rural and small-town areas declined by 0.4%.

In 2001, just over 64 per cent of the Canada's population, or about 19,297,000 people, lived in the 27 metropolitan areas (figures for which are shown below: they correspond with wider agglomerations, not the cities proper, the numbers for which are given in the CityMayors list of the 300 largest cities in the world), up slightly from 63% in 1996. Seven of these 27 areas saw their populations grow at a rate of at least double the national average. The strongest rise, by far, occurred in Calgary.

From 1996 to 2001, Canada's population concentrated further in four broad urban regions: the extended Golden Horseshoe in southern Ontario; Montréal and environs; British Columbia's Lower Mainland and southern Vancouver Island; and the Calgary-Edmonton corridor. In 2001, 51% of Canada's population lived in these regions, compared with 49% in 1996.

[24] **Canadian Statistics Service**
[25] **StatCan**

Canada's largest cities [26]

Rank	City	Province	Population
1	**Toronto**	Ontario	4,263,000
2	**Montréal**	Quebec	3.327.000
3	**Vancouver**	British Columbia	1,832,000
4	**Ottawa**	Ontario	1,010,000
5	**Edmonton**	Alberta	863.000
6	**Calgary**	Alberta	822,000
7	**Québéc**	Quebec	672,000
8	**Winnipeg**	Manitoba	667,000
9	**Hamilton**	Ontario	624,000
10	**London**	Ontario	399,000
11	**Kitchener**	Ontario	383,000
12	**St Catharines-Niagara**	Ontario	372,000
13	**Halifax**	Nova Scotia	333,000
14	**Victoria**	British Columbia	304,000
15	**Windsor**	Ontario	279,000
16	**Oshawa**	Ontario	269,000
17	**Saskatoon**	Saskatchewan	219,000
18	**Regina**	Saskatchewan	194,000
19	**St John's**	Newfoundland	174,000
20	**Sudbury**	Ontario	160,000
21	**Chicoutimi**	Quebec	160,000
22	**Sherbrooke**	Quebec	147,000
23	**Kingston**	Ontario	143,000
24	**Trois-Rivières**	Quebec	140,000
25	**Kelowna**	British Columbia	137,000
26	**Abbotsford**	British Columbia	136,000
27	**Saint John**	New Brunswick	126,000
28	**Thunder Bay**	Ontario	126,000
29	**Barrie**	Ontario	119,000
30	**Sydney**	Nova Scotia	118,000

[26] **CityMayors**

USA [27]

New York [28] [29] [30] [31] [32] [33] [34] [35] [36] [37] [38] [39]

New York City is USA's financial epicentre. It is considered one of the best cities for business scoring very high in company concentration and job to population ratio. Moreover, it is ranked as a top business destination by MasterCard. In addition, New York ranks first in Fortune's best US cities for business as well as being the top of the US urban areas, being 3rd globally on urban population projection and 1st in the USA. The city ranks 10th in the world in top universities. According to a ranking by the Economist, New York is one of the powerhouses of the future, ranking second, just behind Tokyo, in GDP projection to 2020.

According to Forbes ranking:

- GDP (2005): $1.13 trillion
- GDP (2020): $1.56 trillion
- Growth rate: 2.2%
- MasterCard ranking: 2
- Population (2007): 19,040,000
- Purchasing power: 100%

[27] In addition to the 6 cities presented, Philadelphia and Portland also frequently feature as top urban centres, for the same reasons mentioned for the top 6 cities, followed by San Jose and Dallas.
[28] **MarketWatch:** ***Top 10 cities for business: The rest of the best*** – 21.09.07
[29] **WordPress:** ***World's best cities for business according to MasterCard Worldwide research*** – 12.06.08
[30] **Demographia:** *Urban areas ranked by 2008 projected population*
[31] **Wikipedia:** *List of United States urban areas*
[32] **Wikipedia:** *List of United States urban areas*
[33] **RMIT:** ***World's top university cities revealed***
[34] **The Economist:** ***Powerhouses of the future*** – 17.08.07
[35] **Current.com:** ***Best cities for architecture and design***
[36] **Travel and Leisure:** ***New Orleans, New York, Portland (Or) And Charleston (Sc) Are Among "America's Favorite Cities," According To A Travel + Leisure / CNN Poll***
[37] **Forbes:** ***World's Most Economically Powerful Cities*** – 15.07.08
[38] **Financial Times:** ***Creative Cities and their New Elite***
[39] **Statesman:** ***CITIES OF IDEAS: Prosperity and its price***

In absolute terms, the economy of New York City is second only to Tokyo. In fact, there are only 14 countries in the world with bigger economies than New York. And though the city has a reputation for a high cost of living, the average New Yorker can buy more than counterparts in London, Paris, Tokyo and Hong Kong. In addition, in New York are concentrated the most Fortune 500 companies.

New York City has been voted top travel destination according to a CNN poll. The city was ranked No. 1 in more categories (14 in all) than any other city in the poll, garnering the top scores for Big-Name Restaurants, Ethnic Food, Theatre, Classical Music, Underground Arts Scene, Luxury Boutiques, Shopping for Jewellery and Shoes. In additions, it was ranked No. 1. In the Stylish People and Diversity categories. The Museums/Galleries ranked No. 2 overall. In a special question asking respondents to vote on the most over- and underrated cities in the survey, New York also earned the title of the most overrated city in America.

New York is 2nd in the US in terms of architecture and design.

According to Richard Florida's creativity index, New York in the top 10 (9th) in the USA. New York is amongst the 20 US cities that rank above the national average in high-tech production and above the national average in patents per capita.

Los Angeles [40] [41] [42] [43] [44] [45] [46] [47]

Los Angeles is considered one of the best places in the world for business, although its rank has fallen according to MasterCard ratings. The fall of Los Angeles to #17 in 2008, compared to #10 in 2007, is, in part, due to factors around its role in the global financial services network, as well as the rise of European cities in the area of knowledge creation. However, the city ranks #4 in the North American region behind New York, Chicago and Toronto. Los Angeles is the 2nd urban area in the US. Los Angeles is the 13th city in the world in projected population. The city is 15th in the world in top universities. Los Angeles is the 3rd city globally in GDP projection to 2020.

[40] **WordPress:** ***World's best cities for business according to MasterCard Worldwide research*** – 12.06.08
[41] **INC.com:** ***The Best Cities for Doing Business***
[42] **Demographia:** *Urban areas ranked by 2008 projected population*
[43] **RMIT:** ***World's top university cities revealed***
[44] **The Economist:** ***Powerhouses of the future*** – 17.08.07
[45] **Current.com:** ***Best cities for architecture and design***
[46] **Forbes:** ***World's Most Economically Powerful Cities*** – 15.07.08
[47] **Statesman:** ***CITIES OF IDEAS: Prosperity and its price***

According to Forbes ranking:

- GDP (2005): $639 billion
- GDP (2020): $886 billion
- Growth rate: 2.2%
- MasterCard ranking: 17
- Population (2007): 12,500,000

Purchasing power (NYC=100): 120%

Los Angeles is on course to become the world's third city with a trillion dollar economy. And while that economy will always be smaller than New York's, those in Los Angeles take solace: According to UBS estimates, the average resident of L.A. has 20% more purchasing power than their counterparts in New York.

Los Angeles is 4th in the US in the fields of architecture and design. Los Angeles is amongst the 20 US cities that rank above the national average in high-tech production and above the national average in patents per capita.

Chicago [48] [49] [50] [51] [52] [53] [54] [55] [56]

Chicago ranks 3rd in Fortune's best US cities for business. Chicago is the 3rd urban area in the US. Chicago is the 25th city in the world in projected population. The city ranks 8th in top university world hubs. The city is the 4th in the world in GDP projection to 2020.

According to Forbes ranking:

- GDP (2005): $460 billion
- GDP (2020): $645 billion
- Growth rate: 2.3%

[48] **Demographia:** *Urban areas ranked by 2008 projected population*
[49] **Wikipedia:** *List of United States urban areas*
[50] **RMIT:** ***World's top university cities revealed***
[51] **The Economist:** ***Powerhouses of the future*** – 17.08.07
[52] **Current.com:** ***Best cities for architecture and design***
[53] **CityMayors:** **The world's top cities offering the best quality of life**
[54] **Travel and Leisure:** ***New Orleans, New York, Portland (Or) And Charleston (Sc) Are Among "America's Favorite Cities," According To A Travel + Leisure / CNN Poll***
[55] **Forbes:** ***World's Most Economically Powerful Cities*** – 15.07.08
[56] **Statesman:** ***CITIES OF IDEAS: Prosperity and its price***

- MasterCard ranking: 5
- Population (2007): 8,990,000
- Purchasing power (NYC=100): 115%

America's second city faces stern competition from Los Angeles, which now has a larger population and a bigger economy. But Chicago still outranks Los Angeles on MasterCard's Commerce Index. The Chicago Mercantile Exchange and Chicago Board of Trade give Chicago a role in the global financial markets that Los Angeles lacks.

In cultural terms, Chicago ranks 1st in the USA in architecture and design. Chicago is the 44th city in the world regarding quality of life. Chicago has been ranked 3rd US city in classical music as well as theatre, museums and galleries.

Chicago is amongst the 20 US cities that rank above the national average in high-tech production and above the national average in patents per capita.

San Francisco [57] [58] [59] [60] [61] [62] [63] [64] [65]

Considered the USA's information technology capital, San Francisco (including the San Jose and Oakland regions) is home to the Silicon Valley, as well as to a number of well established an upstart companies. The city ranks 4th in the North American region according to MasterCard's Worldwide research on best cities for business, also featuring in other relevant rankings.

According to the creativity index of Richard Florida a professor at Carnegie Mellon University, which constitute "a barometer of a region's longer run economic potential", San Francisco is the most creative American city. It also ranks 6th among the best cities for architecture and design in the USA. In a survey for America's top 25 urban destinations the city scores points for its underground arts scene, its home design, its vintage shopping (clothing and

[57] **Metropolis West:** ***World's best cities for business according to Mastercard Worldwide research*** – 12.06.08
[58] **Marketwatch**: ***Top 10 cities for business*** – 21.09.07
[59] **Inc.com:** **The Best Cities for Doing Business** - 2008
[60] The creativity index ranks cities according to their overall performance and which Mr. Florida calls "a barometer of a region's longer run economic potential.
[61] **New York Times:** ***Creative Cities and their New Elite***
[62] **RMJM Hillier:** ***Portland and San Francisco among America's best cities for design*** – 26.06.08
[63] **Travel+Leisure:** ***America's Favorite Cities 2007*** – 10.10.07
[64] **RMIT University**: ***World's top university cities revealed*** – 30.05.08
[65] The Global University City Index highlights those cities where there is confluence between their size, liveability and connectedness, the number of excellent universities within their bounds and sustained investment in education and research. These cities are home to knowledge workers and research clusters that make them a significant driving force of the knowledge economy.

jewellery), its diverse and stylish people, its ethnic food, its notable neighbourhoods and its skyline and views.

Although the city has a high cost of living, quality of life is considered high. San Francisco also comes 15th in the 2008 Global University City Index.

Washington [66] [67] [68] [69]

Ranking 4th in population among US metropolitan areas, Washington is the home of the world's most powerful government. The city has a flourishing economy and high employment rates, mainly due to federal investment. The city is also a breeding ground for younger companies.

Washington ranks 8th in Richard Florida's list of most creative cities and 10th among the best cities for architecture and design70 in the USA. In a survey for America's top 25 urban destinations, Washington scored high in the categories ARCHITECTURE & NOTABLE BUILDINGS, HISTORICAL SITES & MONUMENTS, MUSEUMS & GALLERIES, also acclaimed for its "worldly" people71.

The city came 11th in the 2007 Global University City Index.

According to the PWC's forecasts for the powerhouses of the future Washington comes 10th among the top cities by estimated GDP in 2020.

Boston [72] [73] [74] [75] [76]

Boston benefits from a bevy of legacy firms like missile maker Raytheon Corp. and retailer TJX Cos. while it also rides resurgence in both health care and information technology. Along with Boston Scientific and Biogen Idec, the city is home to a multitude of small tech firms like Progress Software Corp. and Irobot Corp. There are 2,371 software companies based in the state, many of which are in the greater Boston area, while in the burgeoning robotics category, there are 150 companies, institutes and research firms.

[66] **City population**
[67] **New York Times:** ***Creative Cities and their New Elite***
[68] **2007 Global University City Index**
[69] **RMIT University**: ***World's top university cities revealed*** – 30.05.08
[70] **RMJM Hillier:** ***Portland and San Francisco among America's best cities for design*** – 26.06.08
[71] **Travel+Leisure:** ***America's Favorite Cities 2007*** – 10.10.07
[72] **Marketwatch**: ***Top 10 cities for business*** – 21.09.07
[73] **New York Times:** ***Creative Cities and their New Elite***
[74] **RMIT University**: ***World's top university cities revealed*** – 30.05.08
[75] **The Economist:** ***Powerhouses of the future*** – 17.04.07

[76] **Travel+Leisure:** ***America's Favorite Cities 2007*** – 10.10.07

Boston ranks 3rd in Richard Florida's list of most creative cities and 3rd among the best cities for architecture and design77 in the USA. In the survey for America's top 25 urban destinations Boston is featured for it classical music, historical sites & monuments, antiques, intelligent people and notable neighbourhoods.

Roughly 100 colleges are within 60 miles of downtown Boston, including Harvard and the Massachusetts Institute of Technology: the city comes 2nd in the 2008 Global University City Index.

In the relevant PWC forecast for the powerhouses of the future Boston ranks 12th among the top cities by estimated GDP in 2020.

25 largest US cities [78]

Rank	City	State	Population in 2003	Change since 2000
1	New York	New York	8,085,742	77,464
2	Los Angeles	California	3,819,951	125,131
3	Chicago	Illinois	2,869,121	-26,895
4	Houston	Texas	2,009,690	56,059
5	Philadelphia	Pennsylvania	1,479,339	-38,211
6	Phoenix	Arizona	1,388,416	67,371
7	San Diego	California	1,266,753	43,353
8	San Antonio	Texas	1,214,725	70,079
9	Dallas	Texas	1,208,318	19,738
10	Detroit	Michigan	911,402	-39,868
11	San Jose	California	898,349	3,406
12	Indianapolis	Indiana	783,438	1,568
13	Jacksonville	Florida	773,781	38,164
14	San Francisco	California	751,682	-25,051
15	Columbus	Ohio	728,432	16,962
16	Austin	Texas	672,011	15,449
17	Memphis	Tennessee	645,978	-4,122
18	Baltimore	Maryland	628,670	-22,484
19	Milwaukee	Wisconsin	586,941	-10,033
20	Fort Worth	Texas	585,122	50,428
21	Charlotte	North Carolina	584,658	43,830
22	El Paso	Texas	584,113	20,451
23	Boston	Massachusetts	581,616	-7,525
24	Seattle	Washington	569,101	5,727
25	Washington	DC	563,384	-8,675

[77] **RMJM Hillier:** ***Portland and San Francisco among America's best cities for design*** – 26.06.08
[78] **CityMayors**

Germany

The towns identified to be the top creative centres in Germany are Berlin, Hamburg, Munich and Frankfurt. Below is a quantitative overview, and descriptions of the centres follow.

City/Facts	***Population***	***GDP***	***GDP per capita***	***Growth rate***
Berlin	3,424,764	€ 81.7 billion (2007)	€ 23,292 (2007)	1.8%
Frankfurt	670,000	€ 180.2 billion (2008)	€ 68,751 (2005)	N/A
Munich	1,356,594	€67.3 billion (2005)	€ 41,972 (2005)	N/A
Hamburg	1,769,117	€ 88.9 billion (2007)	€ 50,000 (2007)	N/A

Berlin

Berlin is Germany's most attractive and significant creative centre. It is the city of architecture, boasting buildings of great architectural credentials importance buildings of great architects like Norman Foster, Le Corbusier and Mies van der Rohe. Berlin is also an attraction due to its large variety in museums like DDR, Pergamon and other historical sites such as the Berlin Wall and the Gate of Brandenburg. Some of the most significant music festivals take place in Berlin. Moreover, on the business domain many large multinational companies like Siemens and Deutsche Bann have their headquarters there. Generally, Berlin is a service-based economy, being the third most visited city in Europe, with a paced growth in tourism and is ranked among the top three innovative regions in the European Union. All the above result in rendering Berlin a business and investment destination.

Frankfurt

Frankfurt is the largest financial centre in Europe, with large financial institutions such as the European Central Bank, the German Federal Bank, the Frankfurt Stock Exchange and the Frankfurt Trade Fair. Frankfurt, according to Mastercard (2008), is the 8th top centre of commerce in the world, the 3rd in Europe after London and Paris. Frankfurt airport is one of the busiest airports, as it is also a transit centre. The Internationale Automobil-Ausstellung (the largest motor show in Europe) and the Frankfurter Buchmesse (the largest trade fair in Europe) are two famous events that attract many interessants from the business community. Frankfurt has the

two tallest skyscrapers in the European Union, the Commerzbank Tower, the headquarters of Commerzbank, and the MesseTurm, where the offices of Credit Suisse, Reuters, and Goldman Sachs are. The financial strength of the city is the reason Frankfurt is one of the top investment towns in Europe. The birthplace of Goethe, is also a cultural and educational attraction. Sights like the Saint Bartholomeus' Cathedral, the Saint Paul's Church and the Old Opera House are buildings of great historical importance. The Johann Wolfgang Goethe University and the Business School of Finance and Management are particularly significant European institutions.

Munich

Munich is an economic and cultural attraction for every possible interesant, being the 30th best destination in 2008, according to the National Geographic. Munich is a mix of the old and traditional (Marienplatz, Freuekirche, Peterkirche) and the new and modern buildings (BMW headquarters and Allianz Arena Stadium), thus becoming a beautiful and interesting city. Munich is the place where classical composers such as Wagner, Strauss and Mozart presented much of their work there for the first time. In addition, , festivals like the Oktoberfest and Hoftbrauhaus, which attract numerous visitors and tourists , take place there. Bavaria breweries are the most well-known breweries in Germany and Munich is the centre point for all of them. Moreover, Munich has the strongest economy in Germany and the lowest unemployment rate, housing the headquarters of large MNEs like BMW Allianz, McDonald's and Microsoft. Munich is the second most important financial centre after Frankfurt, due to the financial flow of the region. Munich is also a centre for biotechnology and software, as many specialised companies are based there.

Hamburg

Hamburg is the second largest city in Germany. The Hamburg harbour is the second-largest harbour in Europe after Rotterdam, managing every year approximately 135 million tons of goods. Through international trade, the harbour became by far the fastest-growing in Europe. In Hamburg many entertainment and media (Warner Bros, Financial Times) and Internet-business companies have their headquarters (AOL, Google, Adobe Systems). Hamburg's economy also benefits greatly from the region's tourism in 2006, Hamburg attracted 3 million tourists and has one of the fastest-growing tourism industries in Germany. Important sights in town are St. Michaeli's Cathedral and the old warehouse district. In Hamburg large music and sports events take place every year attracting many interesants of the entertainment

community. It also boasts a large variety of entertainment venues such as cafes, restaurants upon the river and clubs, as it also is the centre of psychedelic trance music.

United kingdom

United Kingdom is a state consisting of four countries: England, Northern Ireland, Scotland and Wales with its overall population reaching 60 million citizens. In an era that place is more important than ever before and it is directly interconnected with the quality of life, United Kingdom has demonstrated a variety of creative centres which set lifestyle trends in a worldwide level. The list of the four most renowned creative centres in the UK is comprised of London, Manchester, Edinburgh and Birmingham.

City/Facts	Population	GDP[79]	GDP per capita[80]	Growth rate
London	13,063,441 (2007)	$ 452 million (2005)	$38.9 (2005)	N/A
Manchester	458,100 (2007)	$ 69 million (2005)	$26.6 (2005)	N/A
Edinburgh	468,070 (2007)	£9,473 (2003) [81]	EUR 40,042 (2003)[82]	N/A
Birmingham	1,010,200 (2005)	$ 72 million (2005)	$27.8 (2005)	N/A

London

London is considered to be the most significant creative centre in the United Kingdom, a "super-star" city which through the passing of time has attracted a wide variety of ambitious, energetic and open-minded people and formed its own unique character. It is not accidental that London and New York are viewed as the two "centres" of the world, attracting the elite of stakeholders, businessmen, tourists and students. With a rich cultural life, the most significant theatres, shows and concerts take place in London whereas the British Museum, Madam Tissaud and Tate Modern possess just a small part in the colossal list with intellectual and cultural sights which allure its citizens and visitors. London provides entertainment attractions of the highest quality in places which range from underground artistic regions like Camden and Soho to more luxurious like Notting Hill and Kensington, setting an international benchmark in bars, restaurants and clubs. Also, London is a hub of fashion, with its famous commercial streets like Bond Str., and Oxford Str., and luxurious malls like Harrods, Westfield and Selfridges. However London's profundity lies in its financial and business services sector as a big portion of

[4] **City Mayor Statistics:** *Richest cities and urban areas in 2005* – 11.03.2007
[5] **Demographia**: *Gross Domestic Product (GDP-PPP) Estimates for Metropolitan Regions in Western Europe, North America, Japan and Australasia* – 04.2007
[81] **City of Edinburgh Council:** *Key Indicators: Edinburgh – Capitalview* - 2003
[82] **Scotsman:** *Edinburgh UK's second most prosperous City* – 03.03.2005

the world's currency circulates in this city. Canary Wharf and the City are considered to be the core of the economy activity whereas the largest banks and MNE's determine the future trends of the business world. In the educational sector London has one of the longest traditions as it consists of important institutions and academies like London School of Economics and Imperial College of London that have advanced and continue to put forward leaders and significant figures of the international jet-set.

Manchester

Manchester is the second most important creative centre in the United Kingdom. The "Capital of the North" was voted in 2008, the second best city for business activities and the 14th best city in Europe. In the educational sector the University of Manchester is considered to be the best business university in the United Kingdom.

Manchester is a fast-growing city with a largely service-based economy which holds the regional headquarters of the Royal Bank of Scotland since 2007. Greater Manchester is well-known for its architecture as it combines the Victorian rhythm evident in buildings like Manchester Tower Hall and contemporary architecture manifested in CIS Tower and Beatham Tower. Moreover, Manchester consists of interesting art monuments like the B of the Bang and is a hub of musical activity as it hosts two legendary orchestras, the Halle Orchestra and the BBC Symphonic Orchestra. However the trademark of Liverpool which has attracted further fame is Manchester United, as it is the most familiar and well-known football club in the world.

Edinburgh

Edinburgh is not called by chance "the Athens of North". It is a city of great cultural and historical importance. Edinburgh is the second most visited tourist destination in the United Kingdom after London, attracting 1 million visitors annually. It is considered to be one of the most picturesque cities in Europe, with St.Giles' and St. Mary's being two of its most celebrated sights.

The city is the heart of numerous museums, art galleries, bars, restaurants and exhibitions; therefore it is an integrated location of entertainment satisfying every possible need of the visitor or the resident of the city. The capital of Scotland has a strong economy which is based on banking, financial services and tourism. Edinburgh hosts the headquarters of the Royal Bank of Scotland, one of the largest banks in capital globally. Moreover, in the educational sector the Edinburgh University has some of the best faculties in medicine, law, veterinary science and informatics.

Birmingham

Brighton is the second most populous British city after London and is in the centre of England, connecting North and South England. Mostly, Birmingham is a major transport hub on the motorway, rail, and canal networks. The International Airport of Birmingham has the second highest proportion of business traffic, behind London Heathrow. HSBC and Lloyds, two of the Britain's "big four" were founded in Birmingham and there are 100,000 employees at the banking sector. In 2007, Cushman & Wakefield stated that Birmingham was the third best place in the United Kingdom to locate a business, and the 21st best in Europe. With an annual turnover of £2,2bn, Birmingham city centre is the UK's second largest retail centre. Also, Birmingham is the birthplace of heavy metal bands which have influenced the heavy metal movement internationally whereas the city hosts famous attractions for the fans of the opera and classical music.

Appendix C

Wine & gastronomy catalysts

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Domain Intelligence: Wine & Gastronomy Catalysts

UK – USA – Germany - Greece

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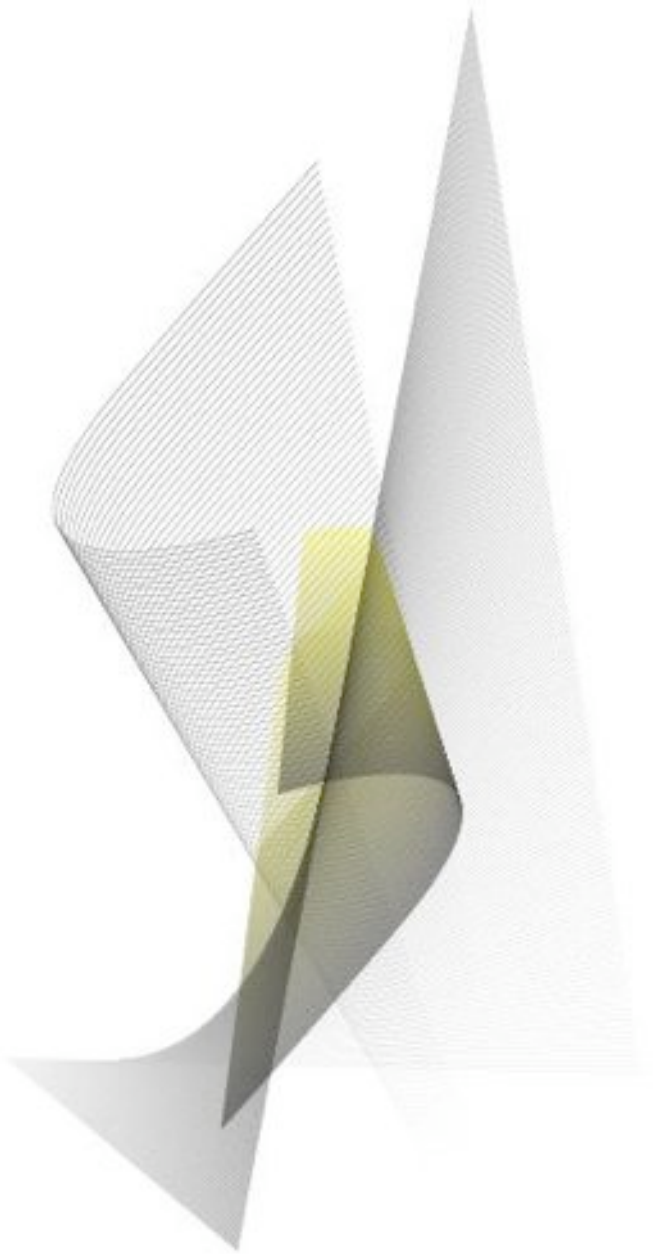

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Introduction

The purpose of this report is to briefly identify and present those actors in the wider wine, gastronomy and entertainment domains that are considered to have a catalytic impact on the trends of their respective fields.

The professional areas explored were selected according to their influence on the entertainment and gastronomy markets. Moreover, a further filter applied was that the selected catalysts are either related to the wine industry or draw wine enthusiasts or appeal to an audience that enjoys wine in general. Thus, they include influential lifestyle, variety, well-being, gastronomy and wine media as well as those regarded as catalysts irrespective of subject – however they feature wine sections or ad hoc articles. These include print, online and audiovisual media. Influential professionals such as chefs, wine experts, editors and other gastronomy celebrities have been included. Venues such as trend-setting restaurants and bars have also been researched and added to the list.

At this point it is important to note that there is significant overlapping between media and venues, especially restaurants, and the influential personalities such as chefs, experts and editors. Clearly, certain media enjoy such credibility due to the professionals they host and vice versa. Finally, events and trade fairs that are evaluated as key for the gastronomy and wine industry and market are also presented.

The criteria for the initial selection and the finalisation of the lists have varied. However, factors such as recognition, i.e. awards or Michelin stars, popularity, circulation and readership were primary.

Although there cannot be a definitive rule regarding who is considered to be a catalyst, certain patterns and common features emerge from research. **The significance of the creative class becomes apparent in view of the profile and locus of the identified catalysts.**

The creative class consists of scientists, engineers, managers, innovators and people in research and development, as well as artists, writers and musicians thinkers, innovators, decision-makers, who influence cultural phenomena and impact business[1]. Their impact not only on the evolution of the consequent creative centres but also on the further concentration of individuals that excel in their domains is evident.

[1] The creative class is a group of people that social scientist Dr. Richard Florida, a professor and head of the Martin Prosperity Institute at the Rotman School of Management at the University of Toronto, believes are a key driving force for economic development of post-industrial cities in the USA.

In the context of the present analysis it is apparent that wine and gastronomy catalysts identified can be traced to a large extent in such creative centres as Greater London, New York, San Francisco, Munich, Athens, or even specific creative areas - Soho, Kolonaki, down town New York. In addition, a concentration in affluent areas (outside urban centres) is observed.

The degree of impact of such catalysts in the wider public is also highly dependent on their media visibility (TV/media celebrity factor). As a manifestation of this, chefs such as Nobu Matsuhisa, Jamie Oliver or Gordon Ramsay are well respected by their peers but have achieved international visibility through their books and TV shows, establishing themselves as influential trendsetters.

Catalysts are presented per target market countries, namely **UK, USA, Germany and Greece** and comprise of:

- **Media** (Wine, Gastronomy, Lifestyle, Well-being, Variety, Media Catalysts, Blogs, TV Shows, Radio Shows, etc)
- **Restaurants & Bars**
- **Influential Personalities** (Chefs, Gastronomy & Wine Experts, Gastronomy & Wine Editors, Gastronomy Celebrities, Food & Wine Critics, TV Chefs, etc.)
- **Awards** (Hospitality Awards, Gastronomy Awards, etc.)
- **Events & Trade Fairs**

UK

Media

Wine Media: Jancis Robinson.com

JancisRobinson.com Ltd, FREEPOST NAT12217, London NW3 5YA, Tel: +44 (0)845 056 4117

Jancis Robinson has been a key contributor to many of the standard reference books on wine. She is editor of The Oxford Companion to Wine and co-author with Hugh Johnson of The World Atlas of Wine. She qualified as a Master of Wine, the first from outside the wine trade, in 1984, and regularly judges and lectures about wine around the world. She has presented several award-winning television programmes including Jancis Robinson's Wine Course and Vintners' Tales and is a professional narrator.

Winner of many international awards, she was given an honorary doctorate by The Open University in 1997 and was awarded an OBE in 2004. She also provides advice for Queen Elisabeth II's wine cellar.

Wine Media: The World of Fine Wine

800 Guillat Avenue, Kent Science Park, Sittingbourne, Kent, ME9 8GU, Tel: 01795 414681, Fax: 01795 414535, E-mail: finewine@servicehelpline.co.uk

The World of Fine Wine (WFW) is a British quarterly publication for wine. The WFW is widely regarded as the best wine magazine in the world.

Its award-winning editorial team is led by Hugh Johnson OBE, Andrew Jefford and Neil Beckett. Other WFW contributors include Michael Broadbent MW, Jancis Robinson MW, David Peppercorn MW, Serena Sutcliffe MW, Tim Atkin MW, Michel Bettane, Thierry Desseauve, Ann C. Noble and Oz Clarke.

Wine Media: Decanter

Blue Fin Building, 110 Southwark Street, SE1 0SU, Tel: 00 44 20 3148 5000800, E-mail: webhelp@decanter.com

Decanter is an **up-market magazine on wine and spirits**. It is published in over 90 countries on a monthly basis. The magazine content includes news from the industry, vintage guides and wine recommendations.

Decanter organises the annual *Decanter World Wine Awards.* Consultant editor in Decanter is Steven Spurrier, the director of The Christie's Wine Course, which he founded with Christie's Education in 1982 and wine consultant to Singapore Airlines. Its circulation reaches 40,000 copies per month.

Wine Media: Wine & Spirit

William Reed Business Media, Broadfield Park, Crawley, West Sussex, RH11 9RT, Tel: 00 44 1293 613400, E-mail: david.williams@william-reed.co.uk

Wine & Spirit occupies a unique position in the UK market for **specialist drinks magazines**, covering not just wine but also spirits, beers and cocktails to provide an unrivalled and exhilarating read. The magazine also enjoys strong readership among the key decision-makers in the UK's drinks market including: supermarket buyers, senior management in hotel and restaurant chains, sommeliers, bar chains and independent bars and clubs.

Wine & Spirit hosts two internationally recognized events - the **International Wine Challenge** and the **International Spirits Challenge** - both of which have first-class reputations around the world and whose trophy awards are seen as the badge of excellence by consumers and industry experts alike. Wine & Spirit is the highest trade circulation of UK magazines in the sector.

Wine Media: Wine & Dine

Tel: 00 44 7050 252738, E-mail: admin@winedine.co.uk

Wine & Dine is an electronic magazine for lovers of wine, restaurants and travel was first published in May 1995.

Internationally acclaimed wine personalities contribute in this magazine, which is now on its seventeenth year, includes over 160 restaurant reviews.

Wine Media: Wine Anorak

Tel: 020 8890 7330, E-mail: jamie@wineanorak.com,

Wine Anorak is one of the most **interesting and comprehensive wine resources** on the web. The website's perspective is more educative and informative therefore is more appealing to wine novices that started their wine journey.

One of the most interesting and comprehensive wine resources on the web with Jamie Goode contributing.

Wine Media: Wine-pages

Tel: +44 (0)141 416 4958, E-mail: info@wine-pages.com

Wine-pages is entirely free to its readers, and is financed by carrying advertising for wine businesses. Wine-pages.com is one of the most popular of all wine-related web sites, with 400,000 unique visitors per month and over 25,000 who subscribe to its monthly newsletter. It is published by **wine writer Tom Cannavan** since 1995.

Over the years wine-pages has also evolved into one of the world's biggest and most visited sites on the subject of wine. It houses a vast repository of wine information consisting of many thousands of pages.

Wine Media: Wine Doctor

E-mail: chris@thewinedoctor.com

Chirs Kissack's website provides valuable information about wine, with producer's profiles with comprehensive wine guides and advices.

In 2005 he was accepted into the Circle of Wine Writers.

Wine Media: Sunday Times Wine Club

The Sunday Times Wine Club, New Aquitaine House, Exeter Way, Theale, Reading, Berkshire, RG7 4PL, *Tel*: 0845 217 9133, Fax: 0845 217 9144

The Sunday Times Wine Club is the number one UK wine club. There are celebrity features from leading wine personalities such as Joanna Simon of The Sunday Times, Andrew Jefford and Tim Atkin. Editor of the magazine is Marcin Miller, who follows in the footsteps of eminent writers Jim Ainsworth, Jancis Robinson MW and Cyril Ray.

Hugh Johnson - author of The World Atlas of Wine, Wine Companion and Hugh Johnson's Pocket Wine Book - has been the most authoritative voice on wine for the past three decades. As Club President, he uses his well-forged reputation to open doors and access some of the finest wines from the greatest estates. Hugh's renowned tasting, talking and writing skills will help bring the world of wine to life.

Published exclusively for Club Members twice a year, the Wine Times is the largest circulation wine magazine in the UK.

Wine Media: Harpers

TalkingDrinks.com and Harpers Wine and Spirit Magazine, Nexus Business Media Ltd, Media House, Azalea Drive, Swanley , Kent BR8 8HU, E-mail: editorial@talkingdrinks.com

Harpers Wine & Spirit Magazine is read across all sectors of the industry including restaurants, hotels, pubs, off licenses and retailers.

The 200 multiple and independent retailers actually represents over 90% of the UK off-trade decision makers and influencers. The 1300 agents are wholesalers, distributors and importers. The 500 producers are based around the world with a presence in the UK market. The 200 PRs and services make up the top echelon of the marketers in the UK market. Harpers has an exclusive agreement with Sommelier Cru meaning we are the subscribed read of the top 300 Sommeliers in the UK.

Harpers represents the 2,300 on trade decision makers who are wine buyers, sommeliers and wine purchasing managers in hotels, restaurants and independent gastro pubs.

Harpers circulation includes the top 500 Independent Wine Merchants in the UK. 90%+ key wine importers and spirit importers subscribe to *Harpers* (NIELSEN 2006).

Wine Media: Off-licence News

Editor: Rosie Davenport, Tel: 00 44 1293 610226, E-mail: rosie.davenport@william-reed.co.uk

off licence news

Off Licence News began in the 19th century as the Wine Trade Review - sister publication to William Reed's original title, The Grocer. For almost 40 years the title has been known by its current name, specialising in the news and issues surrounding the UK off-trade - arguably the most diverse, exciting and competitive drinks marketplace in the world. **Off –Licence news reaches all key decision-makers of big retail chains as well as retail staff**: from wine merchants and supermarkets to off-licences and online businesses.

The magazine is published fortnightly, with an audited circulation of 18,493.

The magazine and its journalists have won a string of prestigious industry awards for its lively mixture of news, features and analysis. Off Licence News is not only the most widely distributed magazine in its sector - but it's also the most respected and enjoyed.

The editorial team is led by group editor Graham Holter.

Gastronomy Media: The Michelin Guide

The Michelin Guide, Hannay House, 39 Clarendon Road, Watford, Hertfordshire, WD17 1JA, Tel: 01923 205247, E- mail: themichelinguide-gbirl@uk.michelin.com

The Michelin Guide (Le Guide Michelin) is a series of annual guide books published by Michelin for over a dozen countries. The term refers by default to the Michelin Red Guide, the oldest and best-known European hotel and restaurant guide, which awards the Michelin stars. Michelin also publishes Green Guides for

travel and tourism, as well as several newer publications such as the Guide Voyageur Pratique (independent travel), Guide Gourmand (good-value eating-places), Guide Escapade (quick breaks) and Guide Coup de Cœur (hotels of character).

The guide awards one to three stars to a small number of restaurants of outstanding quality. In 2004 guide from 5,500, 98 were awarded with one star ('a very good restaurant in its category'), 11 with two stars ('excellent cooking, worth a detour'), and only 3 with three stars ('exceptional cuisine, worth a special journey').

Gastronomy Media: The Good Food Guide

Tel: 0044 1992 822800, Fax: 020 7770 7485, Email: which@which.co.uk

The Good Food Guide is an annual guidebook to the best restaurants in the UK, published by Which? books. The Good Food Guide was first published in 1951 by Raymond Postgate, an enthusiastic gourmet, who was appalled by the standard of contemporary catering. He recruited numerous volunteers to visit and assess restaurants on the basis that, *'You can corrupt one man. You can't bribe an army.'*

The Good Food Guide currently reports on over 1,200 top establishments and is unique as it is completely rewritten every year. The guide is entirely independent as there is no advertising or sponsorship, no fees are accepted for inclusion, and all of the inspections are anonymous.

Readers are actively encouraged to submit their reviews, via the Good Food Guide website, which are then considered for prospective inclusion in next year's guide. The best contributors are put forward to become future restaurant inspectors for The Good Food Guide.

Gastronomy Media: CatererSearch

The Caterer Group, Reed Business Information, Quadrant House, The Quadrant, Sutton, Surrey,SM2 5AS, Tel: 0044 20 8652 8396, E-mail: shaun.barton@rbi.co.uk

Caterer and Hotelkeeper is a weekly magazine for hospitality professionals and is part of the Caterer Group.

The publication covers all areas of the hospitality industry delivery news and developments with regular features of top industry professionals. It provides monthly reviews of the latest hospitality products from kitchen equipment to food and beverages.

Gastronomy Media: Just-Food & Just-Drinks

Seneca House, Buntsford Park Road, Bromsgrove, Worcs, B60 3DX, Tel: 00 44 1527 573 600, Fax: +44 (0)1527 577 423

Just-food and Just-Drinks.com are the food and beverage industries leading online resources. Under the direction of Managing Editor Dean Best and Olly Wehring respectively, the team and network of international analysts provide a mixture of up-to-the-minute news, research and analysis.

As a result, every month more than 85,000 food & beverage executives are kept abreast of the very latest industry developments. The websites produce 20 major stories, articles and features every day, is also a major publisher of market research. The range of reports, studies and profiles encompasses more than 70 titles.

Lifestyle Media: GQ

Editorial Department: charlotte.zamani@condenast.co.uk, Tel: +44 (0)20 7499 9080

GQ is a monthly men's magazine focusing upon fashion, style, and culture for men, through articles on food, movies, fitness, sex, music, travel, sports, technology, and books.

It is generally perceived as upscale sophisticated magazine.

Lifestyle Media: Esquire

300 West 57th Street, 21st Floor, New York, NY 10019, Tel: 212-649-4020

Esquire is a men's magazine by the Hearst Corporation with a strong literary tradition. Founded in 1933, it flourished during the Great Depression under the guidance of founder and editor Arnold Gingrich.

Esquire audience is well educated, urbane, affluent, upper class. The circulation of Esquire is 700,000 copies.

Lifestyle Media: Vogue

Nina.Godfrey@condenast.co.uk, Editorial Department: vogue.com.editor@condenast.co.uk

VOGUE

Vogue is a fashion and lifestyle magazine published in eighteen countries by Condé Nast Publications. Each month, Vogue publishes a magazine addressing topics of fashion, life and design.

British Vogue is the most profitable British magazine as well as the most profitable Vogue besides the US edition. In 2007, it ran 2,020 pages of advertising at an average of £16,000 a page and its circulation of 220,000. Vogue was described by book critic Caroline Weber in The New York Times in December 2006 as 'the world's most influential fashion magazine'.

Lifestyle Media: Cosmopolitan

The National Magazine Company, National Magazine House, 72 Broadwick Street, London, W1F 9EP, Tel: 020 7439 5000, Fax 020 7439 5232, E-mail: cosmo.mail@natmags.co.uk

COSMOPOLITAN

Cosmopolitan is the best-selling young women's magazine in the world. The content includes articles on relationships and sex, health, careers, self-improvement, celebrities, as well as fashion and beauty.

Published by Hearst Magazines, Cosmopolitan has 58 international editions, is printed in 34 languages and is distributed in more than 100 countries.

Well-being Media: Men's Health

Editorial department: nicky.williams@natmag-rodale.co.uk

Men'sHealth

Men's Health (MH) is the world's largest men's magazine brand, with 38 editions around the world, and global circulation of 15 million. It is the best-selling men's magazine on U.S. newsstands. It covers fitness, nutrition, sexuality, lifestyle and other aspects of men's life and health.

The magazine's website, MensHealth.com, averages 40 million page views a month.

Media Catalyst: Financial Times

1 Southwark Bridge, London SE1 9HL, Tel: 020 7873 3000, Fax: 020 7873 3076, E-mail: help@ft.com

Financial Times is a British international business newspaper published in London. It is one of the most important reads in the world, with exceptional quality and increasing readership.

Jancis Robinson currently writes a weekly column for the Financial Times (FT). FT is a very reliable source of information with international circulation of 448,241 (2008) and UK of 133,665 (2008).

Media Catalyst: The Guardian

119 Farringdon Road, London, EC1R 3ER, E-mail: culture@guardian.co.uk

The Guardian is a British newspaper owned by the Guardian Media Group. It is published Monday to Saturday from its London and Manchester headquarters.

The Guardian Weekly, which circulates worldwide, provides a compact digest of four newspapers. It contains articles from The Guardian and its Sunday, sister paper The Observer, as well as reports, features and book reviews from The Washington Post and articles translated from France's Le Monde.

The Guardian had a certified average daily circulation of 351,031 copies as of May 2008.

Media Catalyst: The Observer

119 Farringdon Road, London, EC1R 3ER, E-mail: food.monthly@observer.co.uk

The Observer is a British newspaper published on Sundays. In about the same place on the political spectrum as its daily sister paper The Guardian it takes a liberal/social democratic line on most issues. It is the world's oldest Sunday newspaper.

The weekly circulation of The Observer reaches 453,071 copies as of September 2008.

Media Catalyst: The Times

News International Limited, 1 Virginia St, London E98 1XY, E-mail: newsrev@sunday-times.co.uk

The Times is a daily national newspaper published in the United Kingdom since 1785. The Times and its sister paper The Sunday Times owned by the News Corporation group, headed by Rupert Murdoch. Though traditionally a moderately centre-right newspaper and a supporter of the Conservatives, it supported the Labour party in the 2001 and 2005 general elections. In 2005, according to Ipsos Mori, the voting intentions of its readership were 40% for the Conservative Party, 29% for the Liberal Democrats, 26% for Labour.

The daily circulation of The Times is 618,160 as of May 2008.

Blogs

Wine Blog: Spittoon

Blog updated daily and provides information about wine tasting and wine news. Andrew Barrow, a member of the prestigious UK based Circle of Wine Writers and WSET Diploma holder writes about wine and food.

Regular wine and food writings appear on the Guardian Word of Mouth website.

Wine Blog: UKWinesOnline

Tel: 01242 245985, E-mail:johngordons@gmail.com

Focusing on the vibrant independent wine merchant sector in the UK posts, covers merchant website reviews, events and tastings, special offers and so on. (Spittoon has a wine tasting note/wine with food focus). UKWOL is a joint venture between Andrew Barrow and John Boutall. John has many years in the trade as a specialist French wine

importer. He runs the French Duck blog that details events and happenings in France with a food/wine/travel/culture connection.

Gastronomy Blog: The Foodie List

E-mail: info@thefoodielist.co.uk

The food equivalent of UKWOL but covering both line shops, events and tastings news. Again this is a jointly compiled blog between Andrew Barrow and John Boutall. Coverage of the online merchants, tasting and food events, special offers, reviews of the online delis, off-line merchants and markets, where to find kitchen and food related gifts and equipment.

Restaurants & Bars : London

Restaurant: L'Atelier de Joel Robuchon

13-15 West Street, London WC2H 9NE, Tel: 0207 0108600, E-mail: info@joelrobuchon.co.uk

L'Atelier de Joel Robuchon offers a mixture of Spanish and Japanese-style French cooking. In red and black colours and minimalist style, one can watch the chefs in the theatre kitchen cooking small dishes served sushi-style.

Joel Robuchon is a famous, world-renowned French chef and restaurateur. He was titled 'Chef of the Century' by the guide Gault Millau in 1989 and also awarded the Meilleur Ouvrier de France in cuisine in 1976. He has published several cookbooks and has chaired the committee for the current edition of the Larousse Gastronomique. He operates 16 restaurants in cities worldwide, including Hong Kong, Las Vegas, London, Macau, Monaco, New York City, Paris, and Tokyo, with a total of 24 Michelin Guide stars he holds the most of any chef in the world.

Restaurant: Restaurant Gordon Ramsay

68 Royal Hospital Road, London, SW3 4HP, Tel: 020 7352 4441, Fax: 020 7352 3334

Gordon Ramsay's eponymous restaurant is in Chelsea and

in 2006 undergone a £1m refurbishment.

Gordon Ramsay has been awarded an OBE and is a chef, television personality and restaurant owner.

He has been awarded a total of **14 Michelin Stars** and in 2007 became one of only three chefs in the United Kingdom to hold three Michelin stars at one time. Ramsay currently ranks 3rd in the world in terms of Michelin Stars.

Restaurant: Alain Ducasse at The Dorchester

The Dorchester, Park Lane, London, W1K 1QA, Tel: 0044 2076298866, Fax: 0044 20762986, E-mail: alainducasse@dirchester.com

Seating approximately 80 guests, it is located in a contemporary design by Patrick Jouin, which overlooks Park Lane and Hyde Park. The team behind Alain Ducasse at The Dorchester offer modern but refined French cuisine, as interpreted by Executive Chef Jocelyn Herland.

Alain Ducasse is a famous Monégasque chef. In addition to his Louis XV restaurant in Monaco, he also operates an eponymous restaurant at the Plaza Athenee in Paris.

Until the closure of his New York restaurant at the Essex House hotel, he held three stars in the Michelin Guide in three different countries simultaneously. In January 2007 he took the position as chef of the Jules Verne Restaurant located in the Eiffel Tower in Paris.

Restaurant: St John Restaurant

St. John Bread & Wine Spitalfields, 94-96 Commercial Street, London, E1 6LZ

At St John the menu changes daily and often serves Fergus Henderson's signature dish Roast Bone Marrow and Parsley Salad. Fergus Henderson is often noted for his use of offal and other neglected cuts of meat as a consequence of his philosophy of **Nose To Tail Eating**. Most of his dishes are derived from traditional British cuisine and the wines are all French.

Fergus Henderson founded the St John restaurant and is trained as an architect at the Architectural Association in London. His restaurants became popular for the Young British Art scene and also the unofficial London clubhouse for gatherings of the world's great chefs. In 2005 he was awarded an MBE by The Queen.

Restaurant: Hakkasan

8 Hanway Place, London, W1T 1HD, Tel: 08712238002

Hakkasan is an upper class Oriental fusion restaurant in the West End of London. The restaurant was created by Alan Yau. A multi-million pound interior was designed by the French designer Christian Liaigre who has combined modern aesthetic with traditional Chinese design.

The restaurant gained a Michelin star rating in 2003. The British Restaurant magazine released its sixth annual global ranking of the 50 Best Restaurants in April 2008 and **Hakkasan was rated19th**.

Restaurant: Le Gavroche

43 Upper Brook Street W1K 7QR, Tel: 020 7499 1826, Email: bookings@le-gavroche.com

Le Gavroche is a restaurant is located in Mayfair, London. It was opened in 1967 by Michel and Albert Roux. The restaurant offers classical French food with some having a modern approach. The most famous dishes are Soufflé Suissesse, Le Caneton Gavroche, and Omelette Rothschild. Albert's son Michel Roux Jr. took over the kitchen in 1991 and remains the current head chef.

Le Gavroche has been consistently placed in Restaurant's Top 50. In 1982 it became the first restaurant in the UK to be awarded three Michelin stars. Chefs who have worked in the kitchen of Le Gavroche include Marco Pierre White, Gordon Ramsay, Marcus Wareing and Bryn Williams. Le Gavroche is listed in the Guinness Book of World Records as having served the most expensive meal per head when three diners spent $20,945 on one meal in September 1997.

Restaurant: Nobu London

Metropolitan Hotel, 19 Old Park Lane, Mayfair, London, W1K 1LB, Tel: 0871 2238051

Nobu is known for his fusion cuisine which blends traditional Japanese dishes with South American (Peruvian and Argentine) ingredients. Nobu Matsuhisa is the co-owner along with Robert De Niro and managing partner Richie Notar, and the executive chef of Nobu New York City.

The success of Nobu New York created new openings in Aspen, Athens, Malibu, London, Melbourne, Hong Kong, Tokyo, Mykonos, The Bahamas, and Dubai. Nobu Matsuhisa also had a role in the film Austin Powers.

Restaurant: Fifteen

Fifteen London, 15 Westland Place, London N1 7LP, Tel: 0871 330 1515

International: +44 (0) 870 787 1515

Fifteen is the name of several restaurants created by the English celebrity chef Jamie Oliver. Oliver created the restaurant as part of a 2002 TV series, Jamie's Kitchen, broadcast on Channel 4. Jamie Oliver recruited fifteen unemployed young people, some homeless and others with learning difficulties, and trained them from scratch to become professional-standard chefs. This continued after the TV series finished, and the restaurant has become a success. Many of its graduates have moved on to other top restaurants in London.

Jamie Oliver was named the most influential person in the UK hospitality industry by CatererSearch 100 in May 2005 and second most influential in September 2006.

Restaurant: Zuma

5 Raphael Street, Knightsbridge, London SW7 1DL, Tel: 020 7584 1010

Combining contemporary Japanese cuisine with a decor based on Eastern philosophy, the Zuma restaurant has an 'open-plan' kitchen so patrons can watch culinary masters in their element. The

restaurant features a main dining room, 2 private dining rooms, a sushi bar and counter service and the menu fuses traditional flavours with contemporary flair. The lounge and sake bar caters to a sophisticated clientele, providing 20 different types of sake and tempting cocktails with Japanese liquors.

The Caterer Search mentions *'one of the most stylish and acclaimed Japanese restaurant and celebrity hotspot in London.'*

Bar: Bungalow 8

St Martins Lane Hotel,, 45 St Martins Lane, Covent Garden, London, WC2N 4HX, Tel: 0044 20 7300 5592

Located in the glass box of St Martin's Hotel is an exclusive members club attracting celebrities and setting itself out as a party hotspot.

Bungalow 8 is the sister venue to Amy Sacco's, the famous New York bar of the same name.

Bar: London Claridge's Bar

Brook Street, Mayfair, London W1K 4HR, 0044 20 7629 8860

Claridge's is a traditional grand hotel with an aristocratic ambience and reputation for luxury and expense. Its extensive and old connections with royalty have led to it being referred to as an 'extension to Buckingham Palace'.

The reputation of the hotel was confirmed in 1860 when Empress Eugenie Bar is designed by David Collins Studio.

Bar: Artesian at The Langham Hotel

Langham Hotel, 1 Portland Place W1B 1JA, Tel: 020 7636 1000, Email: info@artesian-bar.co.uk

The Langham Hotel is one of the largest and most traditional style grand hotels in London. It is a member

of the Leading Hotels of the World marketing consortium.

The Artesian bar manager Edward Viita won the 2008 Olive Barnett Award. The Artesian bar is designed by David Collins Studio.

Bar: Galvin at Windows

22 Park Lane, London, W1K 1BE, Tel: 020 7208 4021, E-mail: reservations@galvinatwindows.com

Galvin at Windows is located on the 28th floor of the Park Lane Hilton, with a panoramic view of London, mixes art deco and 1970s design.

Time Out London and Worlds Best Bars.com recommend it as one of the best bars in UK.

Bar: Long Bar at The Sanderson Hotel

50 Berners Street London, England W1T 3NG, Tel. +44 (0) 20 7300 1400 Fax: +44 (0) 20 7300 1401

Long Bar at The Sanderson Hotel is 80-feet in length made of onyx and serves an international array of Mediterranean food.

The Sanderson Hotel was designed by architect Jeff Holroyd. In 1991 the Sanderson building was listed Grade II with a star by the government's English Heritage Commission. It was reopened in 2000 after a refurbishment by Philippe Starck and Denton Corker Marshall.

Bar: The Coburg Bar at The Connaught Hotel

Carlos Place, Mayfair, London, W1K 2AL, Tel: +44 (0)20 7499 7070, E-mail: info@the-connaught.co.uk

The Connaught hotel is in Mayfair, London. The name chosen was that of Queen Victoria's 3rd son Prince Arthur, the first Duke of Connaught. In 2007 The Connaught closed its doors for a £60million restoration programme and The Connaught Bar was replaced by The Coburg Bar. Parisian based designer, India Mahdavi, has created the design for the bar.

Time Out magazine May 2008 voted it 'Best bar in London.'

Bar: Sketch

9 Conduit Street, Regent Street, Mayfair, London, W1, Tel: 0870 777 4488

Sketch is a well known bar and restaurant in Mayfair, London, owned by Morad Mazouz.

A grade II listed building was formerly the headquarters of both RIBA and Christian Dior and was designed by Mazouz and the sculptor Noel Douchafour Lawrence. Several other international designers were commissioned for signature pieces, which are featured the restaurant and bar.

Bar: Milk & Honey

61 Poland Street, Soho, London W1F 7NU, Tel: 07000 655 469

This member's only bar, and is a sister bar of Milk & Honey in New York, is located in Soho London. House rules such as 'Gentlemen will remove their hats' and 'Do not bring anyone unless you would leave that person alone in your home' are intended to be taken seriously and helps to attract a friendly crowd. It is essential to call and reserve in advance as the management does not specify its exact location.

Time Out London and Worlds Best Bars.com recommend it as one of the best bars in UK. The cocktails menu is designed by Dale DeGroff.

Restaurants & Bars : Greater London and the South East

Restaurant: The Fat Duck

The Fat Duck, High Street, Bray Berkshire, SL6 2AQ, Tel: +44 (0) 1628 580 333, E-mail: deborahchalcroft@thefatduck.co.uk

The Fat Duck is a restaurant operated by chef Heston Blumenthal. The restaurant is known for its menu of unusual

dishes, created following the principles of molecular gastronomy.

The restaurant is one of only three in the United Kingdom and Ireland that received a **three-star Michelin Guide rating in 2004**. In 2005, it was named as the **best restaurant in the world** by Restaurant magazine.

Restaurant: The Waterside Inn

Address: Ferry Road, Bray, SL6 2AT, Tel: +44 (0)1628 620691

The Waterside Inn, was founded in 1967 by the brothers Michel and Albert Roux following the success of Le Gavroche.

In 1982 it became the first UK restaurant to hold three Michelin stars. The Waterside Inn gained its third Michelin star in 1985 and has held onto this accolade longer than any other UK restaurant. The Waterside Inn is currently run by Michel's son Alain.

Restaurant: L'enclume restaurant

Address: Cavendish Street, Cartmel, nr Grange-over-Sands, LA11 6PZ, Tel: +44 (0)1539 536362

L'enclume is a restaurant in Cartmel, England. The chef is Simon Rogan. Rogan proclaims, 'rules are there to be broken' and his latest tasting menu 'Tour' showcases presents on a plate Egg Drop Hot and Sour Soup, and Razor Role Reversal with Curry Leaf, Sweet Potato, Bourbon, Chocolate.

The restaurant was voted as 'Readers Choice' of 2008 by Restaurant magazine Top 50.

Restaurant: Le Manoir aux Quat' Saisons

Church Road, Great Milton, Oxford, UK, Tel: 01844278881

Le Manoir aux Quat' Saisons is a luxury hotel-restaurant in the village of Great Milton near Oxford,

England. It is located in a historic manor house near the church that was visited by Oliver Cromwell. The restaurant was used as filming location for the Chateau Anglais of the show Chef! and it is also used in the BBC 2 shows. The Manoir is famous for its providence and knowledge of the ingredients. Raymond insists that this makes it a better restaurant.

The restaurant has two Michelin stars and scores 9/10 in the Good Food Guide. It is owned and run by the leading French chef Raymond Blanc. The gardens are used to grow fresh food for the restaurant. A helipad is available for clients.

Influential Personalities

Chef: Joel Robuchon

13-15 West Street, London WC2H 9NE, Tel: 0207 0108600, E-mail: info@joelrobuchon.co.uk

Joel Robuchon is a famous, world-renowned French chef and restaurant owner. He was titled 'Chef of the Century' by the guide Gault Millau in 1989 and also awarded the Meilleur Ouvrier de France (France's Best Craftsman) in cuisine in 1976. He has published several cookbooks and has chaired the committee for the current edition of the Larousse Gastronomique, and has hosted a culinary television show in France.

He operates 16 restaurants in cities worldwide, including Hong Kong, Las Vegas, London, Macau, Monaco, New York City, Paris, and Tokyo, with a total of 24 Michelin Guide stars, the most of any chef in the world.

Chef: Alain Ducasse

The Dorchester, Park Lane, London, W1K 1QA, Tel: 0044 2076298866, Fax: 0044 20762986, E-mail: alainducasse@dirchester.com

Alain Ducasse is a famous Monégasque chef. He formerly held French nationality. In addition to his Louis XV restaurant in Monaco, he also operates an eponymous restaurant at the Plaza Athenee in Paris.

Until the closure of his New York restaurant at the Essex House hotel, he held three stars in the Michelin Guide in three different countries simultaneously. In January 2007 he took the position as chef of the Jules Verne Restaurant located in the Eiffel Tower in Paris.

Chef: Gordon Ramsay

68 Royal Hospital Road, LONDON, SW3 4HP, Tel: 020 7352 4441, Fax: 020 7352 3334

Gordon Ramsay OBE is a chef, television personality and restaurant owner.

He has been awarded a total of 14 Michelin Stars, and in 2007 became one of only three chefs in the United Kingdom to hold three Michelin stars at one time. Ramsay currently ranks 3rd in the world in terms of Michelin Stars behind Joel Robuchon and Alain Ducasse.

Ramsay is known in the United Kingdom for presenting TV programmes about competitive cookery and food, such as Hell's Kitchen and The F-Word. He is best known in the United States as the host of FOX Hell's Kitchen, which premiered in May 2005, and of Kitchen Nightmares, which premiered in September 2007, based on his successful British show Ramsay's Kitchen Nightmares.

Chef: Heston Blumenthal

The Fat Duck, High Street, Bray Berkshire, SL6 2AQ, Tel: +44 (0) 1628 580 333, E-mail: deborahchalcroft@thefatduck.co.uk

Heston Blumenthal OBE is the chef and owner of The Fat Duck, a three-Michelin-starred restaurant in the village of Bray voted Best Restaurant in the UK by the Good Food Guide 2007.

Blumenthal is famous for his scientific approach and has been described as a culinary alchemist for his innovative style of cooking.

Chef: Fergus Henderson

St. John Bread & Wine Spitalfields, 94-96 Commercial Street, London, E1 6LZ

Fergus Henderson is an English chef who founded the St John restaurant in St John St, near the famous Smithfield Market and St John Bread and Wine. He is often noted for his use of offal and other neglected cuts of meat as a consequence of his philosophy of Nose To Tail Eating. Following in the footsteps of his parents, Brian and Elizabeth Henderson, he trained as an architect at the Architectural Association in London. Most of his dishes are derived from traditional British cuisine and the wines are all French.

His restaurants became popular for the Young British Art scene and also the unofficial London clubhouse for gatherings of the world's great chefs. His stoic

approach to Parkinson's disease which was diagnosed in 1998 increased the regard in which he was held and he was awarded an MBE by HM The Queen in 2005. The same year he underwent innovative Deep Brain Stimulation which vastly improved his mobility and he has since become a symbol of hope to other sufferers. He now uses his considerable influence on the now affluent British Art Scene to raise money for Parkinson's charities.

Chefs Anthony Bourdain and Mario Batali have both praised Henderson for his dishes, which optimise British food while making full use of the whole animal. A.A. Gill famously retracted his initial hostility to St John in the Sunday Times.

Chefs: Michel, Michael Jr., Albert, and Alain Roux

43 Upper Brook Street W1K 7QR, Tel: 020 7499 1826,Email: bookings@le-gavroche.com

In 1967, the Roux brothers opened Le Gavroche in London's Lower Sloane Street. Michel's son Alain is joint chef patron of the three-Michelin starred Waterside Inn in Bray, UK. The father-and-son team also owns the White Hart Inn near Colchester in Essex, which is run by ex-Waterside staff.

Michel Roux Jr is a two star Michelin Guide French chef at the London restaurant, Le Gavroche.

Michel and his brother Albert are viewed as the godfathers of modern restaurant cuisine in the UK. They put Britain on the culinary map, raised standards across the board through their ground-breaking Michelin-starred restaurants, TV series, books, and trained and encouraged many of today's top chefs.

Chef: Raymond Blanc

Church Road, Great Milton, Oxford, UK, Tel: 01844278881

Blanc opened the first of a chain of smaller restaurants, Le Petit Blanc restaurants in Oxford. Blanc's stated aim with these was to bring the French philosophy of 'good food being central to good living' to the United Kingdom. His desire was to create and serve food that can be enjoyed by everyone 'from the time conscious business person to those looking for a welcoming family restaurant.'

Raymond Blanc (age 59) is a French chef and owner of Le Manoir aux Quat' Saisons, a hotel-restaurant in Great Milton, England. The restaurant has two Michelin stars and scores 9/10 in the Good Food Guide.

Chef: Jamie Oliver

Website contact form

James Trevor 'Jamie' Oliver was awarded an MBE and is a celebrity chef. He is well known for his role in campaigning against processed foods in British schools. Oliver is reported to be worth an estimated £25 million.

The Naked Chef was Oliver's first TV series. The success of the programme led to the books Return of the Naked Chef and Happy Days with the Naked Chef. He also has twice guest-hosted Channel 4's The Friday Night Project.

He has also written columns for The Times. A great proponent of fresh organic foods, Oliver was named the most influential person in the UK hospitality industry by the CatererSearch 100 in May 2005 and the second most influential in September 2006.

The list placed Oliver higher than Sir Francis Mackay, the then-chairman of the contract catering giant, Compass Group, which Oliver had soundly criticised in 'Jamie's School Dinners'.

Chef: Rick Stein

The Seafood Restaurant, Riverside, Padstow, Cornwall, PL28 8BY ,Tel: 01841 532700, Fax: 01841 532942, Email: reservations@rickstein.com

Christopher Richard Stein OBE is an English chef, restaurateur and television presenter. Born in Oxfordshire, Stein attended Uppingham School and read English at New College, Oxford. Tiring of life in the city, he moved to Padstow, Cornwall where he had spent many childhood holidays.

Stein opened his first business in Padstow in 1974, and now specialises in fish cookery. His business operates three restaurants, a bistro, a cafe, a seafood delicatessen, patisserie shop, a gift shop and a cookery school.

His impact on the local economy of Padstow is such that it has been nicknamed 'Padstein'.

Chef: Rainer Becker

8 Hanway Place, London, W1T 1HD, Tel: 08712238002

Rainer Becker gained experience at some of Germany's top restaurants (including the Michelin-star Koenigshof in Munich and Goethehaus in Bensberg) before joining the Hyatt hotel group, where he worked for 14 years around the globe.

After working as a consultant on Alan Yau's Hakkasan restaurant, Becker is the owner of Zuma in London.

Chef: Mark Edwards

Metropolitan Hotel, 19 Old Park Lane, Mayfair, London, W1K 1LB, Tel: 0871 2238051

Mark Edwards is executive chef of the Michelin-starred Nobu London, the first restaurant to be opened outside the USA by the celebrated Japanese chef Nobuyuki Matsuhisa, and its younger sister Nobu Berkeley Street which also holds a Michelin star.

Edwards additionally has overall responsibility for Ubon by Nobu in London's Canary Wharf and has played a key role in organising the kitchens and training staff at all new Nobu restaurants.

Chef: Nobu Matsuhisa

Metropolitan Hotel, 19 Old Park Lane, Mayfair, London, W1K 1LB, Tel: 0871 2238051

He is an international celebrity chef and restaurateur. Nobu is known for his fusion cuisine which blends traditional Japanese dishes with South American (Peruvian and Argentine) ingredients. His signature dish is black cod in miso. He was also the pioneer of soft shell crab and shrimp tempura rolls, both attempts to please the western palate.

Nobu is the co-owner (along with Robert De Niro, and managing partner Richie Notar) and the executive chef of Nobu New York in Tribeca. The success of Nobu New York spawned several similarly themed restaurants in Aspen, Athens, Malibu, London, Melbourne, Hong Kong, Tokyo, Mykonos, The Bahamas, and Dubai.

He also had a role in the film Austin Powers in Goldmember as a Japanese business man.

Chef: Simon Rogan

Cavendish Street, Cartmel, nr Grange-over-Sands, LA11 6PZ, Tel: +44 (0)1539 536362

Simon Rogan has been called one of the most innovative chefs in Britain and his restaurant L'Enclume is counted amongst the top 5 eating destinations in Europe.

Chef: Hugh Fearnley-Whittingstall

E-mail: parkfarm@rivercottage.net

Hugh Fearnley-Whittingstall is a British celebrity chef, television presenter and 'real food' campaigner, known for his back-to-basics philosophy.

He has written the best-selling cookery books The River Cottage Cookbook, The River Cottage Year and The River Cottage Meat Book which details his philosophy of organic husbandry whilst also covering many aspects of selecting, preparing and cooking meat.

His latest book is The River Cottage Fish Book. He has written articles for The Guardian and The Observer since 2001. A collection of his short articles was published in October 2006 under the title Hugh Fearlessly Eats It All: Dispatches from the Gastronomic Frontline.

Fearnley-Whittingstall is currently trying to get people to become more aware of food production through his Chicken Out campaign.

Gastronomy Expert: Adrian Anthony Gill

E-mail: newsrev@sunday-times.co.uk

Adrian Anthony Gill is a British newspaper columnist and writer, using the by-line A. A. Gill.

He is currently employed by the Sunday Times as their restaurant reviewer and television critic.

Awards

Hospitality Awards: The Cateys Awards

Tel: 0044 2086528680, E-mail: Shiva.Hobson@rbi.co.uk

The Caterer Group runs The Catey Awards which have been running for 25 years. The Cateys is a UK award ceremony for the hospitality industry and have awarded personalities such as Gordon Ramsay, Albert Roux and Michel Roux and Marco Pierre White in the past.

Hospitality Awards: Acorn Awards 2007

Tel: 0044 20 8652 3656, E-mail: lisa.goold@rbi.co.uk

Acorn Awards recognise the achievements of industry professionals under the age of 30. These prestigious awards are credited with finding the future leaders of the hospitality industry and have in the past identified key players including Marco Pierre White, Gary Rhodes and Michael Caines. Entries considered are from all industry sectors, from chain restaurants and independent restaurants to hotels and contract caterers. The awards are organised by the Caterer Group

Gastronomy Awards: Excellence in Food & Drink Awards

Tel: 0044 20 8652 3094, E-mail: shiva.hobson@rbi.co.uk

The 2008 Caterer and Hotelkeeper run Excellence in Food and Drink Awards, in association with 3663 First for Foodservice, is an opportunity to recognise the invaluable contribution of manufacturers for their delivery to the food and drink industry's customers. The awards are organised by the Caterer Group.

Gastronomy Awards: Glenfiddich Food & Drink Awards

Website contact form

The Glenfiddich Food & Drink Awards, presented annually since 1970, honour the work of writers and photographers, broadcasters and publishers working in the field of food and drink.

Additional catalysts for the UK market

Gastronomy and wine catalysts for the UK presented under this section have been identified during the course of the project by members of the project's experts groups.

Media

Wine Media: Drinks International

Christian Davis, Telephone: +44 (0)1293 76350, email: christian.davis@drinksint.com

Drinks International is a magazine and website specialising in wines and spirits. In the content of Drinks International, the reader can find the latest developments and trends within the global drinks industry. Moreover, the medium includes editorial features on various industry matters, business news, market reports, news analysis and opinion surveys.

Drinks International organises events for cocktails, the "Drinks International Cocktail Challenge" and the "Drinks International Spirits Challenges", for spirits.

Wine Media: Off-licence News

Editor: Rosie Davenport, Tel: 00 44 1293 610226, E-mail: rosie.davenport@william-reed.co.uk

Off Licence News began in the 19th century as the Wine Trade Review - sister publication to William Reed's original title, The Grocer. For almost 40 years the title has been known by its current name, specialising in the news and issues surrounding the UK off-trade. Off –licence News reaches all key decision-makers of big retail chains as well as retail staff, from wine merchants and supermarkets to off-licences and online businesses.

The magazine is published fortnightly, with an audited circulation of 18,493. The magazine and its journalists have won a string of prestigious industry awards for its lively mixture of news, features and analysis. Off Licence News is not only the most widely distributed magazine in its sector - but it is also the most respected and enjoyed.

Wine Media: Evening Standard Magazine

Evening Standard, Northcliffe House, 2 Derry Street, London W8 5EE
020 7938 6000, E-mail: es.magazine@standard.co.uk

The Evening Standard magazine is the lifestyle magazine of the Evening Standard. It covers a large variety of matters, while it includes the FoodSpy column, where experts and other celebrities contribute.

Blogs

Wine Blog: The Wine Gang

Website contact form

Tim Atkin, Anthony Rose, Joanna Simon, Olly Smith and Tom Cannavan, five experts of wine have created this blog offering the reader significant information about the wine industry. This membership-based blog reviews 200 wines per month.

Restaurants

Restaurant: Benares

12A Berkeley Square House, Berkeley Square, London, W1J 6BS, UK, **Tel:020** 7629 8886, Fax:020 7499 2430, E-mail: laura@saucecommunications.com

Benares Restaurant specializes in combining British and Indian cuisine. Atul Kocchar, a top celebrity chef and the chief-in-charge of the Benares restaurant, is a top celebrity and Michelin star awarded chef. In addition, he hosts the British TV for the BBC. The restaurant has a large variety of wines to offer.

Restaurant: Chez Bruce

2 Bellevue Road, Wandsworth Common, SW17 7EG, Tel: 020 8672 0114, Fax: 020 8767 6648

Bruce Poole and Nigel Platts-Martin, owners of Chez Bruce, set up a restaurant specialising in French cuisine. The Michelin-star awarded restaurant has been influenced from Spanish and Italian cuisine. The restaurant has won several awards.

Sommelier of the restaurant is the well-known Terry Threlfall, who is the Chief Sommelier of the Vancouver Playhouse Wine Festival, one of the world's biggest wine festivals.

Restaurant: The Victoria

10 West Temple Sheen, London SW14 7RT Tel: 020 8876 4238, E-mail: bookings@thevictoria.net,

The Victoria is a public house and dining room with seven hotel rooms. Restaurateur Greg Bellamy and Paul Merrett have refurbished this pub and have created a hotel-bar-dining room. Paul Merett is the Chef of The Victoria.

Olly Smith is the influencer responsible for the wine list of the company. The modern cuisine of the restaurant can be combined with the special choices of the wine expert Olly Smith.

Influential Personalities

Wine Expert: Steve Daniel

Steve Daniel used to work as a chief buyer for "Oddbins Wine Merchant", a UK leading company for wine and spirits. . He has previously co-operated with Greek wine companies, in an effort to import them in the UK.

Wine Expert: Steven Spurier

Steven Spurier or "champion of French wine" is a British wine expert. He was a merchant in Paris and organized the Paris Wine Tasting in1976. At this event he managed to influence the export of French wines. He has also founded the Academie du Vin and Christie's Wine Course and is the author of several wine books. He is a graduate of London School of Economics.

Wine Expert: Oz Clarke

Tel: 020 76051459, E-mail: dgoodwin@anovabooks.com

Oz Clarke is one of the world's leading wine experts. He has won all the major wine writing awards both in the UK and the USA, including the Glenfiddich (three times), André Simon, Wine Guild (three times), James Beard, Julia Child, World Food Media and Lanson (five times)

awards; and most recently in 2006 he won the prestigious International Wine & Spirit Competition International Drinks Communicator of the Year Award.

Wine Expert: Andrew Jefford

Mandy Little, 48 - 56 Bayham Place, London NW1 0EU, Tel: 00 44 020 7388 7529 or, E-mail: al@WatsonLittle.com

Andrew Jefford is a wine expert, writing several articles and books about wines from all over the world. Andrew Jefford is now a columnist for the Financial Times, Decanter, World of Fine Wine and Waitrose Food Illustrated. He occasionally publishes articles at the World of Fine Wine. Since he became a journalist he has written articles for a wide variety of different magazines and newspapers, including The Times, The Guardian and Scotland on Sunday.

Wine Editor: Tim Atkin

E-mail: tim.atkin@observer.co.uk, Tel: (0)203 353 4175

Tim Atkin is one of Britain's best wine writers. Now, he is currently a columnist for The Observer. He is also a TV celebrity where he appears every Sunday in OM and Wine Editor at Large of Off Licence News. He also writes for Decanter, Woman and Home, The World of Fine Wine, The Economist's Intelligent Life and Observer Food Monthly and appears regularly as a wine expert on BBC One's Saturday Kitchen.

He has won five times the Glenfiddich award and has been awarded in 2007 as the Best Drink Journalist at the World Food Media Awards.

Wine Editor: Olly Smith

E-mail: renay@curtisbrown.co.uk

Olly Smith presents the BBC1's weekly Saturday Kitchen and the Richard and Judy Wine Club for Channel 4. Furthermore, he is doing a new show called "Cheers from Chile". Olly Smith presents shows in UKTV Food and Sky One, while he has appeared in many events with Gordon Ramsay, Michel Roux, Raymond Blanc and Hugh Fearnley Whittingstall.

Wine Editor: Anthony Rose

E-mail:taste@taste-in.com, Sophie: 07725 941 447, John: 07748 948 278

Anthony Rose has won several awards for his wine writing including, most recently, the Glenfiddich Wine Writer of the Year Award 2005, the Prix de Lanson Black Label Award 2000 and the Prix de Lanson Champagne Writer of the Year 2002. Anthony Rose is the Independent Wine correspondent and is a judge in wine competitions from all over the world. He is also a teacher at the Leiths School of Food & Wine Certificate course.

Wine Editor: Joanna Simon

joanna@joannasimon.com, Francine Fletcher, Fletcher Associates,
Tel: (0)208 361 8061

Joanna Simon is the wine writer of The Sunday Times in London since 1987. Now she writes for the paper's Style magazine. Moreover, she judges frequently at international wine competitions and gives tastings and tutorials to groups and individuals, both consumer and trade. She is also one of the founders of thewinegang.com which reviews at least 200 wines a month online.

Wine Editor: Peter Richards

Website contact form

Peter Richards is one of the youngest wine-writers who have won awards. In 2001, he won the award of the Young Wine Writer from the Webster's circle of Wine Writers. Peter is a familiar celebrity on the British audience. He is the host of shows on the TV for BBC, UKTV Food and Sky One.

Wine Editor: Susie Barrie

Website contact form

Susie Barrie is an award-winning wine writer, broadcaster and presenter. She is a host in TV and radio shows for BBC, UKTV Food and Carlton Food Network. In addition, she is a host at Sky News, LBC Radio and BBC Radio Scotland.

Susie Barrie has won at the Gourmand World Awards 2006. Moreover, she is a judge for the IWC, the IWSC and the Decanter World Wine Awards. Susie has judged the national French Wine Match competition and she has regularly hosted the Celebrity Chef Kitchen at the Organic food and wine fair in London.

Wine Critic: Maggie McNie

80 Wharncliffe Road, London, SE256SL, Tel: 020 3256 2038 Fax: 020 84020519, E-mail: maggiemcnie@aol.com

Maggie McNie is a wine buyer for a UK hotel chain, the Malmaison Wine Club, and a Master of Wine in 1986. She has since worked as a consultant, writer, speaker and educator. Maggie is extremely experienced and familiar with all the aspects of wine trade and industry. Maggie McNie is a lecturer on wine trade examination courses in United Kingdom, North America and Ireland. McNie specialises in Champagne.

Wine Critic: Jane MacQuitty

Website contact form

Jane MacQuitty is a wine columnist, writing articles on Times and the Times Magazine.

Fairs and Events

Fair Trade: London Wine and Fair Trade

Brintex, 32 Vauxhall Bridge Road, London SW1V 2SS, United Kingdom,
Tel: (0) 20 7973 6401, Fax: (0) 20 7233 5054, E-mail: wine@hgluk.com

The London Wine and Fair Trade is an annual event that takes place in Excel London. The 2009 London Wine and Fair Trade will be hosted form 12May to 14 May. Last year the event attracted 14,000 visitors who came to see 1,250 international exhibitors, each of which had on average 5 to 10 wines.

Event: WinePlus

Graham Lock, Event Director, Tel: (0)20 7886 3046, E-mail: graham.lock@freshrm.co.uk

The Wine Plus is an event taking place in the UK annually. The last one took place at Olympia London, in February 2009. The event hosted many visitors and exhibitors from many countries of the world and spanning many professions within the wine industry. In the 2009 event, there were nearly 100 exhibitors.

Event: BBC Good Food Show

BBC Haymarket Exhibitions, Teddington Studios, Broom Road
Teddington, Middlesex, TW11 9BE, Tel: 020 8267 8300, Fax: 020 8267 8350

This is one of the most important events taking place in the UK. The next event, the Summer Good Food show will take place in Birmingham on 10-14 June 2009. This event is the fourth of the BBC Good Food Show 2008-2009. At the previous event there were nearly 500 exhibitors.

USA

Media

Wine Media: Wine Spectator

M. Shanken Communications, 387 Park Avenue South, New York, NY 10016 , Tel: 212-684-4224, Email: wsonline@mshanken.com.

Wine Spectator is a lifestyle magazine that focuses on wine. It is amongst **the top five media in the world regarding wine** and very important catalyst for the wine industry as a whole.

In 2005 the paid circulation was over 382,000 and the magazine reached an estimated 2.25 million readers worldwide. That year, its panel of experts blind tasted and reviewed over 12,400 wines. Each of the 16 issues per year contains a large section devoted to wine reviews and wine ratings. Among the critics in the magazine's tasting panel are James Suckling, James Molesworth and James Laube.

Wine Media: Food & Wine

Tel: 800-333-6569

Food & Wine is **a trend-spotting, talent-seeking gastronomy magazine**.

Food & Wine has a circulation of nearly 1 million with Lettie Teague as its Executive Wine Editor. Her story "Secret Life of a Sommelier" won the 2003 MFK Fisher Distinguished Writing Award, granted by the James Beard Foundation.

Wine Media: Wine & Spirits

2 West 32nd Street, Suite 601, New York, NY 10001, Tel: 212-695-4660, E-mail: elenab@wineandspiritsmagazine.com

Wine & Spirits magazine is **one of the most important publications for wine**.

Along with publisher and editor Joshua Greene other contributors are Fiona Morrison MW, David Schildknecht, Bill St. John and Victor de la Serna, Tara Q. Thomas, Patrick Comiskey, Patricio Tapia, and Peter Liem.

Wine Media: Wine Enthusiast Magazine

Wine Enthusiast Magazine, 333 North Bedford Road, Mt. Kisco, New York 10549, Tel: 914.345.8463, Fax: 914.218.9186, E-mail: webeditor@wineenthusiast.net

Wine Enthusiast Magazine is a lifestyle magazine covering wine, food, spirits, travel and entertaining topics.

Reaching 686,000 (2006 Mendelsohn Affluent Survey) readers, it includes wine ratings hosts events for consumers and the trade, such as the Toast of the Town walk-around food and wine event (New York, Chicago, San Francisco, and Atlanta) and The Annual Wine Star Awards dinner.

Wine Media: Wine News

P.O. Box 14-2096, Coral Gables, FL 33114, Tel: 305.740.7170, Fax: 305.740.7153914.218.9186, E-mail: webeditor@wineenthusiast.net

Wine news is published bi-monthly since 1985, with the latest news on wine.

Editor of the Wine News is Gerald D. Boyd who contributes regularly to The San Francisco Chronicle, Quarterly Review of Wine, Winestate (Australia), Hotel F&B Executive, Vineyard & Winery Management and Decanter (UK). Other well-know writers contributing are Jeff Cox, Lyn Farmer, and Tom Hyland.

Wine Media: Quarterly Review of Wines

QRW, 24 Garfield Avenue, Winchester, Massachusetts 01890, Tel: 781-729-7132 Fax: 781-721-0572

Quarterly Review is a wine magazine on wine, food, travel and is published quarterly. In a national survey conducted by the Beverage Journals of America, wine importers, distributors, and retailers rated **QRW one of the top three wine magazines.**

QRW contributors include Michael Broadbent MW, David Peppercorn MW, Serena Sutcliffe MW. Clive Coates MW, Rosemary George MW, Ed McCarthy, Jacqueline Friedrich, Burton Anderson and Gerald D. Boyd.

Wine Media: Wines and Vines

Wines and Vines, Tel: 415.453.39700, Fax: 415.453.2517, E-mail: info@winesandvines.com

WINES & VINES

Wines & Vines is a monthly magazine, Directory/Buyer's Guide and Marketing software package providing collection of products, news, information, marketing and research capabilities for the wine and grape industry.

Wines & Vines is a BPA Audited publication that combines a circulation of over 5,000 with a focused readership to wineries and growers.

Wine Media: Wine Business Monthly

110 W. Napa St. Sonoma, CA 95476, Tel: 707-939-0822, Fax: 707-939-0833, E-mail: info@winebusiness.com.com

Wine Business Monthly includes a product review[2] product surveys and introduces new products.

Wine Business Monthly has the largest circulation of any wine trade publication in North America.

Wine Media: Nirvino

Website contact form

Nirvino BETA wine transcended

Nirvino is a social networking website devoted to reviews, information, and news on wine.

Nirvino was founded in 2007 by San Diego Christian Schroeder and Phil McGarr. Nirvino's technology combines wine reviews from print, online, and broadcast wine critics. The site has been noted on CNET TV, Apple Inc. and The Huffington Post.

[2] Covering everything from tank presses and mobile bottling lines to ATV's and yeast

Wine Media: Snooth

E- Snooth, Inc., 419 Lafayette St, Floor 2, New York, NY 10003

Snooth is a social networking website based in New York City, USA.

As of July 2007, the site had the largest number of wine reviews with over 1.7 million ratings across 300,000 wines. The site has been noted in Decanter (magazine), the New York Daily News, and the New York Post.

Wine Media: Just-Drinks.com

Tel: +44 (0)1527 573 600, Fax: +44 (0)1527 577 423

Just-drinks.com is beverage's industry online resource. It is under the direction of Managing Editor Olly Wehring, providing up-to-the-minute news, research and analysis to 85, 000 beverages executives.

Wine Media: Wine Library TV

586 Morris Avenue, Springfield, NJ 07081, Tel: 888-980-WINE (9463), E-mail: info@winelibrary.com

Wine Library TV is a daily internet webcast on wine, hosted by Gary Vaynerchuk.

Wine Media: All I Do is Wine

E-mail: Zita@allidoiswine.com

All I Do is Wine Zita Keeley's blog is considered amongst the most influential within the wine industry.

Zita Keeley is a professional wine educator, and wine events organizer. She has her own wine organazation "**All I Do is Wine**" and runs "Zita Keeley's Wine School". In June 2007 she was honoured with winning the Women for Winesense "Rising Star" award.

Drinks Media: The Spirit Journal

The Spirit Journal, E-mail: mail@spiritjournal.com

"The Spirit Journal: The Independent Guide to Distilled Spirits, Beer, and Fortified Wines" is a quarterly newsletter published in the United States that presents information about alcoholic beverages.

This publication is the world's most quoted publication on spirits, beer, and fortified wines, according to the newsletter's website. The quarterly newsletter's no-advertising policy and strict evaluation methods ensure unbiased opinions, professional appraisals that are guided solely by product quality, tasting format, and expertise rather than price or reputation.

Gastronomy Media: Gourmet

Website Contact Form

Gourmet specializes on food, travelling, entertaining and culture. It is a monthly publication of Condé Nast Publications (which also produces its sister publication Bon Appétit), awarded with "America's Top Tables Award".

Gastronomy Media: Cooks Illustrated

Cook's Illustrated P.O. Box 7446 Red Oak, IA 51591-0446, Tel: 515-247-7571

Cook's Illustrated includes recipes, equipment reviews, taste test and it is mostly addressed to cooks.

Gastronomy Media: Everyday with Rachael

Website contact form

Everyday with Rachel is a magazine for entertaining, food and travel.

Gastronomy Media: Vegetarian Times

Vegetarian Times, PO Box 420235, Palm Coast, FL 32142-0235, E-mail: vtcs@aimmedia.com

Vegetarian Times is a magazine on food, health, and smart living. Each issue recipes, new tastes, old favourites, and tips on how to healthy cooking.

Gastronomy Media: Bon Appetit

Contact Us : bonappetit.com

Bon Appetit is one of the most famous guides on to food, fine wine, and entertaining.

Lifestyle Media: People

E-mail: Editor@people.com

People (full name People Weekly) is a weekly American magazine of celebrity and human interest stories, and it also hosts videos with presentation of some of the most refined restaurants.

People was named "Magazine of the Year" by Advertising Age in October 2005, for excellence in editorial, circulation and advertising.[2] People ranked #6 on Advertising Age's annual "A-list" and #3 on Adweek's "Brand Blazers" list in October 2006.

Lifestyle Media: New York Magazine

New York Media, 75 Varick Street, New York, NY, 10013, Tel: 01- 212-508-0700

New York is a weekly magazine concerned with the life, culture, politics, and style of New York City. Its 2005 paid circulation was 437,181, with 94.6% of that coming from subscriptions. The website receives visits from 1.1 million users monthly. Its restaurant listings, menus and bar guides are among the most renowned while it also includes recipes from famous chefs.

Lifestyle Media: Time Out Magazine

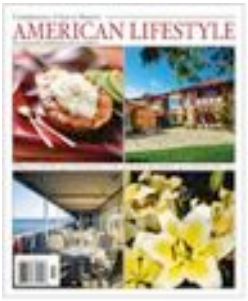
Website Contact Form

The **Time Out** is a city guide magazine which publishes food, drink and restaurant information[3] and guides for **London, New York**, Dubai and Paris.

Lifestyle Media: American Lifestyle Magazine

[3] Twenty-three cities and larger areas currently published (January 2008 data) including London, **Chicago**, **New York**, Beijing, Dubai, Istanbul, Tel Aviv, Cyprus, Moscow, Athens, Singapore, Saint-Petersburg, Bucharest, Almaty, Jerusalem, Kiev, Mumbai, New Delhi, Abu Dhabi, Sydney, Shanghai and Barcelona.

1150 First Avenue, Suite 230, King of Prussia, PA 19406, Tel: + 1 866 458 4226Fax: + 1 610 878 2000, E-mail: info@remindermedia.com



American Lifestyle Magazine is published by Digital Grapes, LLC. It is sent by real estate agents in the United States to their current and past clients. The magazine is bimonthly and includes articles on travel, culture, art, and food. Each issue also includes a different recipe and tear-out recipe card.

Lifestyle Media: Vogue

Website contact form

Covers fashion, beauty, health, fitness, travel, entertainment and other areas of interest of today's women.

VOGUE is considered the leading modern magazine on women's style.

Vogue was described by New York Times book critic Caroline Weber as "the world's most influential fashion magazine". It currently hosts Boo Murphy's blog on "life's luxuries" such as unique dining rooms, restaurants and wine lists are.

Lifestyle Media: O, The Oprah Winfrey Magazine

Website contact form

O! is a monthly magazine for women founded by Oprah Winfrey and Hearst Corporation. It was first published in 2000. As of June 2004, its average paid circulation was over 2.7 million copies, two thirds by subscription.

Oprah's vibrant personality has become a role model for many women and her O's magazine is a great success. The publication includes among others inspirational stories, latest fashions, and cooking tips.

Lifestyle Media: Esquire

300 West 57th Street, 21st Floor, New York, NY 10019, Tel: 212-649-4020, E-mail: esqcustserv@cdsfulfillment.com.

Esquire is a men's lifestyle magazine that's packed with fashion advice, political commentary and smart editorial.

Esquire is a really influential Men's magazine with detailed guides on food and drink. **It annually publishes two "Top Lists" on the best new bars and restaurants.**

Lifestyle Media: GQ

Website contact form

GQ (originally Gentlemen's Quarterly) is a monthly men's magazine focusing upon fashion, style, and culture for men, through articles on food, travel, sports, technology, and books.

GQ has an extensive section of Bars and Restaurants and a separate section on 'Food and Drink'.

Lifestyle Media: Vogue Men's

Website contact form

Men's Vogue is a twice yearly men's magazine that covers fashion, design, art, culture, sports and technology. It has two detailed sections on Food and on Wine & Spirits.

Variety Media: AARP The Magazine

601 E Street NW, Washington, DC 20049, Tel: 1-888-687-2277

AARP The Magazine is a bi-monthly magazine published by AARP, which focuses on aging issues. It includes a detailed food section and a recipe database.

Variety Media: Readers Digest

Website contact form

Reader's Digest is a monthly general-interest family magazine co-founded in 1922 by Lila Bell Wallace and DeWitt Wallace. Although its circulation has declined in recent years it is still the best-selling consumer magazine in the USA, with a circulation of over 10 million copies in the United States, and a readership of 38 million.

The magazine is compact, with its pages roughly half the size of most American magazines, including a detailed food section

Variety Media: National Geographic

National Geographic Society, 1145 17th Street N.W., Washington, D.C. 20036-4688 E-mail: pressroom@ngs.org

The National Geographic Magazine is the official journal of the National Geographic Society. It published its first issue in 1888. It contains articles about geography, popular science, history, culture, current events, and photography. Its food videos from all around the world are renowned and of unique quality.

The current Editor-in-Chief of the National Geographic Magazine is Chris Johns, who was named Editor of the Year in October 2008 by Advertising Age Magazine at the American Magazine Conference.

In May 2007, National Geographic magazine won the American Society of Magazine Editors' General Excellence Award in the over two million circulation category and the best photography award for three issues of the magazine in 2006.

Media Catalyst: The New York Times

New York Times Building, 620 Eighth Avenue, New York, NY 10018, E-mail: webeditor@nytimes.com

The New York Times is the largest US metropolitan newspaper of international distribution. Its daily circulation reaches 1,077,256 copies and it is owned by The New York Times Company, which publishes 18 other newspapers.

New York Time's "Dining & Wine" (Style Section) includes important information and recommendations about wine and food. In June 2004 **Eric Asimov, creator of the "25 and Under" restaurant reviews (1992-2004) assumed the position of** the chief wine critic after having covered wine as Tastings columnist (Dining Section). **New York Times** published "The New York Times Guide to Restaurants 2004," the fifth edition of the guide.

Media Catalyst: The Washington Post

The Washington Post, 1150 15th Street, NW Washington, D.C. 20071, Tel: 703.469.2500, Fax: 703.469.2995, E-mail: ombudsman@washpost.com

The Washington Post is an American newspaper with editions for D.C., Maryland and Virginia only. Its daily circulation reaches 699,130 and its Sunday circulation 929,921.

Its "Food and Dining" Section publishes a high-quality "**Restaurant Guide**" for the Columbia District every year. Its column about wine is renowned as wine columnists; **Andrew Dornenburg and Karen Page** won the 2006 **Georges Duboeuf Wine Book** of the Year Award.

Media Catalyst: San Francisco Chronicle

901 Mission Street, San Francisco, CA 94103, Tel: (01) 415 777-1111, E-mail: lbennett@sfchronicle.com

San Francisco Chronicle

Northern California's largest newspaper[4] has a total daily circulation of 386,564 copies and 438,006 copies Sunday's Edition

San Francisco Chronicle has a "Food Section" with two guides on food and wine: **"Top 100 Restaurants**" and "**Top 100 Wines**". This year **San Francisco Chronicle** published a guide called: "Top 100 Wines Pairings" which combines wine paired with food proposals.

Media Catalyst: Newsday

Newsday, 235 Pinelawn Road Melville, NY 1174, Tel: (01) 212 251-6600, E-mail: web@newsday.com

Newsday

Newsday is a daily tabloid-size **Pulitzer Prize winning newspaper** that primarily serves Long Island and the New York City borough of Queens, although it is sold throughout the New York City metropolitan area.

As of fall 2007, Newsday's weekday circulation of 387,000 made it 10th-highest in the United States, and the highest for a suburban newspaper. It has a detailed "Food Section" including wine proposals by **Peter M. Gianotti who has written several books on wine.**

Media Catalyst: The New York Observer

The New York Observer, 915 Broadway, 9th Floor, New York, NY 10010, Tel: 01 212 755-2400, E-mail: editorial@observer.com

THE NEW YORK OBSERVER

The New York Observer is a weekly newspaper which focuses on the city's culture, media, entertainment and politics. The average net worth of its readership exceeds $1.7 million and 96% of its readers are college graduates.

The New York Observer has an extensive number of 'Top 10 Lists' on food and drinks (like Brunches, Newcomer Bars, and Wine Bars).

[4] It serves primarily the San Francisco Bay Area, although distributed throughout Northern California, including the Sacramento area and North Coast.

Media Catalyst: Time Magazine

Contact Website Form

Time is a weekly American newsmagazine, created in 1923 by Briton Hadden and Henry Luce, making it the first weekly news magazine in the United States.

In 2007, Time's paid circulation dropped to 3.4 million.

In recent years, Time has assembled an annual list of the 100 most influential people of the year while It regularly hosts articles on restaurants, bars and general culinary topics.

Media Catalyst: Newsweek

Newsweek, 251 W. 57th St., New York, NY 10019, E-mail: Letters@newsweek.com

Newsweek is the second largest news weekly magazine in the U.S

As of 2003, worldwide circulation is more than 4 million, including 2.7 million in the U.S

Newsweek is generally considered the most liberal of the three American major newsweeklies and hosts a range of articles related to food and drinks.

Current Affairs Media: Slate

251 W. 57th Street, 19th Floor, New York, NY, 10019-1894, Tel: (212) 445-533, E-mail: nyoffice.slate.com

Slate

Slate is an online current-affairs and culture magazine created in 1996. Member of its staff and renowned wine writer is Mike Steinberger.

TV Show: 30 Minute Meals & $40.00 A Day

Website contact form

30 Minute Meals and **$40.00 A Day** shows hosted by Rachel Ray focus on low-budget and easy to cook meals.

TV Show: Good Eats

Website contact form

Good Eats, hosted by Alton Brown is a comical program about different foods.

TV Show: Food Challenge

Website contact form

Food Challenge is a show that challenges the dexterities of various chefs.

TV Show: Iron Chef America

Website contact form

Iron Chef America show is produced by Food Network and presented by Alton Brown and like the original Japanese program is a culinary game show.

TV Show: Feasting on waves

Website contact form

Alton Brown searches for America's culinary roots and Caribbean flavors in Feasting on Waves.

TV Show: America's Test Kitchen

American Public Television, 55 Summer Street Boston, MA 02110, Tel: 617-338-4455 F: 617-338-5369, E-mail: info@aptonline.org

America's Test Kitchen, currently in its eighth season, is the most-watched cooking show on public television.

TV Show: Lidia's Italy

info@lidiasitaly.com

Lydia's Italy is a journey around food markets, fishing villages and farms in Italy and kitchen cooking.

Television Show: Daisy Cooks

E-mail: info@alacartetv.com.

Daisy Martinez's cooking relates to Latin-inspired cuisine.

TV Show: Baking with Julia

Website contact form

Julia Child presents America's most renowned pastry chefs, bakers, teachers and cookbook authors.

TV Show: Barefoot Contessa

46 Newtown Lane, East Hampton, New York, 11937

Barefoot Contessa is a popular TV Show based on the The Barefoot Contessa Cookbooks.

TV Show: Made in Spain

E-mail: viewermail@josemadeinspain.com

Made in Spain began airing on public television stations across the country in February of 2008. It is hosted by José Andrés, famous TV chef.

Radio Show: Hidden Kitchens Texas

The Kitchen Sisters, 916 Kearny Street, San Francisco, California 94133, Tel: 415.788.0290

Hidden Kitchens is the duPont Award wining radio series on NPR's Morning Edition focusing on the interaction of communities across America with food. It is hosted by Willie Nelson, Robin Wright Penn, and Jimmie Dale Gilmore.

Radio Show: Mouthful, the Wine Country's Most Delicious Hour

P. O. Box 1552, Sebastopol CA 95473, E-mail: mouthful@micheleannajordan.com

Mouthful features discussions with winemakers, farmers, cookbook authors, writers, photographers, filmmakers, nutritionists, chefs, restaurateurs and environmentalists. Iot is hosted by Michele Anna Jordon.

Radio Show: The Splendid Table

E American Public Media, The Splendid Table, 480 Cedar St., St. Paul, MN 55101

The Splendid Table is a radio show focusing on recipes, culinary know-how and influential personalities related to food and cooking. The host is Lynne Rossetto Kasper.

Radio Show: GrapeRadio

GrapeRadio Inc, 17802 Irvine Blvd, Suite 215, Tustin, CA 92780, Tel: 01 714.883.2506, Email: contact@graperadio.com

GrapeRadio is a James Beard Award Winning Radio Program discussing wine related topics that is broadcast over the Internet on wine news and industry trends.

Events & Trade Fairs

Event: Food & Wine Classic In Aspen

E-mail: francesca.s.andreani@aexp.com

Food & Wine Magazine Classic in Aspen is one of the oldest food events including tastings, pairings, demonstrations, cooking competitions and book signings.

Event: Food Network South Beach Wine & Food Festival

E-mail: info@sobewineandfoodfest.com

Food Network South Beach Wine & Food Festival is held for four days in Miami's South Beach district, hosting more than 40,000 guests and celebrity chefs from the Food Network's roster; including Mario Batali, Nobu Matsushisa, Giada De Laurent's and Bobby Flay.

Event: Epcot International Food & Wine Festival

The **Epcot International Food & Wine Festival is a** six-week event held every fall. It attracts almost 250 chefs, food and wine from more than 25 countries, including cooking seminars, demonstrations and book signings.

Event: Southern Breeze Wine & Culinary Festival Southern Breeze Wine + Culinary Festival

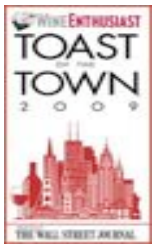
175 NorthShore PlaceGulf Shore, AL 36542, Tel: 251.968.4600, E-mail: KDavis@compassbiz.com

The Southern Breeze Wine + Culinary Festival is held several times throughout the year in different locations including a Grand Wine Tasting, Brunch Walkabout and the Gulf Coast Chef Challenge. The

next event is scheduled for September 12-14 in Santa Rosa Beach in Florida.

Event: Wine Enthusiast Toast of the Town

1400 S Lake Shore Dr Chicago, IL 60605, USA, Tel: 01 800-356-8466



The one-day Wine Enthusiast Toast of the Town is known for pairing hundreds of wines with signature dishes from local restaurants at a different location every time.

Event: New Orleans Wine & Food Experience

1100 Tulane Avenue, 705 New Orleans, LA 70112, United States, 01 504 -529-9463

The **New Orleans Wine & Food Experience is** held every May since 1992. NOWFE features local celebrity chefs like John Besh, Tory McPhail and Susan Spicer. It also includes two Grand Tastings at the Louisiana Superdome, vintner dinners, cooking competitions and a "Krewe of Cork" parade through the French Quarter.

Event: Charleston Food & Wine Festival

Charleston Food + Wine Festival, PO Box 22823 Charleston, SC 29413, Tel: 843.727.9998. E-mail: info@charlestonfoodandwine.com

Charleston Food + Wine Festival specializes in pairing of wines and regional food while attracting local talents and famous visiting guests such as Top Chef's Sam Talbot and Gourmet magazine's Ruth Reichl.

Trade Fair: Boston Wine Expo

Seaport World Trade Center, 200 Seaport Boulevard, Suite 309, Boston, MA 02210-2031, Tel: 877-946-3976, Fax: 617.385.5166

Boston Wine Expo which is the largest trade and consumer wine event in the country takes place in Boston on January 23-25, 2009, attracting more than 450 wineries.

According to notable Food and Wine Magazine this is the largest consumer wine expo with great wine tasting quality.

Trade Fair: World Wine Meeting-Chicago

The 3-days World Wine Meeting in Chicago attracts wine producers from all over Europe.

Trade Fair: InterBev-Las Vegas

Interbev Show Management, 10474 Armstrong Street Fairfax, Virginia 22030, Tel: 01 703 934 4700, Fax: 01 703 934-4833, E-mail: interbev@cmgexpo.com

InertBev is a large exhibition on beverages and related job functions. It features live demonstrations, and interactive displays.

Trade Fair: Miami International Wine Fair

Miami International Wine Fair, Tel: 866.887, Fax: 866.229.3031, E-mail: info@miamiwinefair.com

The **8th Annual Miami International** Wine Fair, to be held September 25-28, 2009 at the Miami Beach Convention Center, is one of the largest wine tradeshows in America, featuring nearly 500 producers showcasing more than 1,500 wines from 20 countries.

Over 2,000 meetings will be scheduled in the 2009 edition, generating estimated sales of over 500,000 cases of wine.

Trade Fair: New York Expo

New York Expo, Tel: 1-800-544-1660

The New York Wine Expo is a three-day exposition catering to both the general public and the trade in the nation's hub.

Its main advantage is that it attracts a wide-ranging variety of more than 600 wines from over 170 winemakers in the Grand Tasting.

Trade Fair: Washington D.C. International Wine & Food Festival

Seaport World Trade Center, 200 Seaport Boulevard, Suite 309, Boston, MA 02210-2031, Tel: 800-343-1174, Fax: 617.385.5166

The **Washington D.C. International Wine & Food Festival** enters its 10th season as the largest indoor wine event in the Mid-Atlantic. Over 200 international wineries participate annually along with food vendors, and manufacturers of related lifestyle products and services.

Restaurants & Bars: California

Restaurant: The French Laundry

6640 Washington St, Yountville, California, 94599, Tel: 707 944-2380, E-mail: jfukui@frenchlaundry.com

The French Laundry is an American restaurant inspired by French cuisine in Napa Valley, California. It was bought in 1994 by the renowned chef Thomas Keller and it immediately starts receiving excellent reviews from New York Times and Esquire.

The French Laundry has received many awards (2000, "Favorite Restaurant in the U.S., Food & Wine Magazine Restaurant Experts" Poll, 2003, "Outstanding Service Award," James Beard Foundation"). It is considered to be **the best Restaurant in the Americas for the third consecutive year according**

to Restaurant Magazine Top 50 whereas in 2007 it received 3 Michelin Stars.

The French Laundry has attracted talented chefs as Jonathan Benno, Jeffrey Cerciello, Eric Ziebold, Grant Achatz, Ron Siegel, Ritz Carlton, Duff Goldman and Gregory Short.

Restaurant: Chez Panisse

1517 Shattuck Ave, Berkeley, CA 94709-1598, Tel: 510 548 5525, Fax: 510 548 0140, E-mail:webmaster@chezpanisse.com.

Chez Panisse **is a Californian restaurant known locally as the "Gourmet ghetto".**

For the past two years Chez Panisse has been listed by **Restaurant magazine among the top fifty restaurants in the world and Michelin Guide awarded it a one-star rating.**

Bar: Cantina

580 Sutter St, San Francisco, CA 94102, United States, Tel: 01 415-398-0195, E-mail: cantinalifesf@yahoo.com

Cantina (San Francisco) according to its own description is a Latin dwelling, an Art Salon and a Culinary Cocktail lounge with star Duggan McDonnel as its cocktail mixologist.

Cantina has received excellent reviews in New York Times, Zagat and Esquire, and it is considered to be one of the Best Bars in the US.

Bar: Bar Nineteen 12

NINETEEN12 at the Beverly Hills Hotel, 9641 Sunset Boulevard, Beverly Hills, CA 90210, Tel: 01 310.273.1912

Bar Nineteen 12 of the Beverly Hills Hotel is in the Top-Ten Hotel Bars Forbes List. This lobby bar offers two different settings: a glamorous indoor bar and a terrace overlooking the pool and gardens.

Restaurants & Bars: New York

Restaurant: L'Atelier

Four Seasons Hotel, New York, 57 East 57th ST. NY 10022, Tel: 01 212.350.6658

L'Atelier is the name of French haute cuisine restaurants, operated by renowned chef Joel Robuchon. They are located in Paris, Tokyo, New York, Las Vegas, London and Hong Kong

In 2008 L'Atelier was voted 14th best in the world according to Restaurant magazine Top 50 List. The seventh L'Atelier is due to open in Philadelphia in 2010.

Restaurant: Per Se

10 Columbus Cir, New York, NY 10019-1158, Tel: 01 212 823-9335

Per Se is considered to be the urban version of the French Laundry and it is also owned by Thomas Keller. It opened in February 2004 in the Time Warner Center in New York City and his chef Jonathan Benno was personally trained by Keller.

Per Se received three stars in the Michelin Guide, in August 2005 and four stars since its opening from the New York Times. It is in the list of New York's Top 50 Restaurants according to Leisure + Travel Magazine whereas "Restaurant Magazine has ranked as the second best restaurant in the USA.

Restaurant: Le Bernardin

155 W 51st St, New York, NY 10019, Tel: (212) 554-1515, E-mail: dine@le-bernardin.com

Le Bernardin is one of the best seafood restaurants in the USA. When its owner and Chef Gilbert Le Coze passed away, Eric Ripert succeeded him as the head chef.

The restaurant was voted **20th best in the world in the "Restaurant magazine Top 50 for 2008"** and it is one of only three restaurants in New York awarded **three Michelin stars**. Le Bernandin has held **four stars from the New York Times** for a long period of time and it has been awarded

various awards from the James Beard Foundation-Outstanding Restaurant 1998, Outstanding Chef -Eric Ripert- 2003, Outstanding Pastry Chef -Michael Laiskonis- 2007.

Restaurant: Daniel

60 East 65th Street, New York, NY 10021, Tel 212.288.0033, Fax 212.396.9014, E-mail: info@danielnyc.com

Daniel is owned by French Chef Daniel Bouloud. Daniel is rated as one of the top ten restaurants in the world, by International Herard Tribune**.**

It has also been on Gayot's TOP 40 US Restaurants since 2004 and received Gourmet's Top Table Award, a four-star rating from the New York Times, Wine Spectator's Grant Award, and New York City's top ratings for cuisine service and décor in the Zagat survey.

Restaurant: Le Cirque

151 East 58th Street, New York, NY 10022, Tel: 01 212 644-0202

Le Cirque is a French restaurant in Manhattan owned and operated by Sirio Maccioni which operated Osteria del Circo as well. In 2008 and 2007, Gayot rated Le Cirque as one of the Top 40 Restaurants in the US.

Restaurant: NOBU New York

Nobu New York, 105 Hudson Street, New York, NY 10013, Tel: 212.219.0500, Fax: 01 212.219.1441, E-mail: newyork@noburestaurants.com

Nobu is one of the most famous restaurants of the past decade, co-owned by Nobu and Robert De Niro. Its success triggered the expansion of similarly themed restaurants worldwide. It has been awarded the 2003 Restaurants and Institutions Award, the 1999 Gourmet Award.

Bar: The Rose Bar and Jade Bar

2 Lexington Avenue, New York, NY 10010, Tel. 212 920 3300, Fax 212 673 5890, E-mail: rosebar@gramercyparkhotel.com

Labelled as haute bohemian, eclectic and eccentric, their candlelit places include custom-designed furniture by Julian Schnabel and masterworks of the 20th century by artists including Andy Warhol, Jean-Michel Basquiat, Keith Haring, Richard Prince, Damien Hirst, and Julian Schnabel himself.

The Rose Bar and Jade Bar of Gramercy Hotel in New York are two of the best hotel bars according to Forbes Traveller.

Bar: PDT

113 St. Marks Pl. New York, NY 10009, nr. First Ave., Tel: 212-614-0386

PDT (Please Don't Tell) is a cocktail bar in New York City described as the epitome of the understated. It combines 21st century elegance and some of the most skilled bartenders in the USA.

Esquire is including it to its best bars list while New York Times and Zagat describe it as exceptional.

Bar: Brandy Library

25 North Moore St (at Varick St), Tribeca, Tel: 01 212-226-5545

Brandy Library (which is also situated in New York City) is a library of more than 900 rare spirits (Darroze armagnac, Pierre Ferrand cognac 1914, Springbank 1969 single malt) and of 100 signature and classic cocktails, carefully chosen wines and beers.

With countless excellent reviews from New York Times, Wine Spectator and New Yorker, it is named as a spirit school by Time Out

Bar: 67 Orange Street

67 Orange Street, 2082 Frederick Douglass Blvd , nr. 113th St., Tel: 01 212-662-2030

67 Orange Street is a Harlem lounge, inspired by Almack's Dance Hall. It is owned by Karl Franz Williams, of Harlem's Society Coffee.

Time Out New York has branded as one of the best new bars in New York. 67 Orange Street focuses as much on the drinks as the food, with mixologist Kali Erwin fashioning cocktails of unique inspiration.

Bar: Sweet & Lowdown

123 Allen St., New York, NY 10002. Delancey Street, Tel: 212-228-7746

Sweet & Lowdown is one of the best new bars in New York according to Time Out New York. Its wines and cheese list is exclusively American. Sweet & Lowdown is owned by Israel Katz who also has Le Jardin Bistro.

Restaurants & Bars: Chicago

Restaurant: Alinea

1723 North Halsted, Chicago Illinois 60614, Tel: 01 312-867-0110, E-mail: info@alinearestaurant.com

Alinea is a renowned restaurant in Chicago which opened in 2005,its owner and chef is Grant Achatz.

It was named the **best restaurant in America by Gourmet in its 2006 top 50 list** and is on the list of the top US restaurants according to Restaurant magazine.

Restaurant: Charlie Trotter

Charlie Trotter's, 816 West Armitage, Chicago, Illinois 60614, Tel: 01 773 248-6228, E-mail: info@charlietrotters.com

Charlie Trotter's restaurant in Chicago, which opened in 1987, is named as one of the best American restaurants by "Restaurant Magazine" and Gayot's Top 40 US List.

Restaurants & Bars: Boston

Bar: La Grande Dame Bar- Liberty Hotel

The Liberty Hotel, 215 Charles Street, Boston MA 02114St. Marks Pl., New York, NY 10009, Tel: 617.224.4000, Fax: 617.224.4001

Boston's Liberty Hotel which was once a jail in the Boston Granite-style, it's now home to a stylish champagne bar. **La Grande Dame Bar is one of the best hotel bars according to Forbes Traveler List**

Bar: Eastern Standard

528 Commonwealth Avenue, Kenmore Square, Boston, Tel: 01 617 532 9100, Fax: 01 617 5329110, E-mail: info@easternstandardboston.com

Eastern Standard in Boston is a renowned cocktail bar with head bartender Jackson Cannon.

It has received the Boston Phoenix awards for the Best Wine List and the Best Bartender and Esquire has included it in its 2008 Best Bars List.

Restaurants & Bars: Seattle

Bar: Vessel

1312 5th Ave, Seattle, WA 98101, Tel: 01 206 652 0521, E-mail: info@vesselseattle.com

Vessel is a modern down-town cocktail bar located in the historic 1926 Skinner Building in Seattle. Equire magazine included it to his 2008 list of Top US Bars.

Influential Personalities

Chef: Joel Robuchon

Four Seasons Hotel, New York, 57 East 57th ST. NY 10022, Tel: 01 212.350.6658

Robuchon is considered to be **the best chef in the world with 22 Michelin stars.** He has been titled "Chef of the Century" by the guide Gault Millau in 1989. He recently gained **Michelin's top honour of three stars** for his restaurant "Robuchon a Galera" at the Hotel Lisboa in Macau, as well as one star for his "L"Atelier de Joël Robuchon" in Hong Kong.

He owns and operates many restaurants in Hong Kong, Las Vegas, London, Macau, Monaco, New York City, Paris and Tokyo. Some of his cookbooks include: "**The Complete Robuchon", "French Cheeses", "Joël Robuchon Cooking Through the Seasons", "La Cuisine de Joël Robuchon", "L"Atelier of Joël Robuchon: The Artistry of a Master Chef and His Protégés" and "Le Grand Larousse Gastronomique"**.

Chef: Thomas Keller

6640 Washington St, Yountville, California, 94599, Tel: 707 944-2380, E-mail: jfukui@frenchlaundry.com

Thomas Keller is considered to be **the best American chef in USA and fourth in the global ranking with seven Michelin Stars**. **Keller is one of only two chefs of the world with two three-star restaurants, the "French Laundry" and "Per Se".**

Apart from "French Laundry" and "Per Se"**,** Thomas Keller is also involved in **"Ad Hoc" in Napa Valley, "Bouchon" in Napa Valley and Las Vegas and "Bouchon Bakery" in New York. He is also involved in cook-book writing (French Laundry Cookbook)**

Some of his awards include the following:

Best American Chef: California, James Beard Foundation, 1996, **Outstanding Chef**: America James Beard Foundation, 1997, **Chef of the**

Year, Bon Appetit Magazine, 1998, **America's Best Chef**, Time Magazine, 2001

Chef: Alain Ducasse

The St.Regis Hotel, Two East 55th Street, New York,, NY 10022, Tel: 01 21 2710 2277, E-mail: alainducasse@adour-stregis.com

Alain Ducasse is a famous Monegasque chef who holds three stars in the Michelin Guide in three different countries. In June 2000, he opened the Alain Ducasse restaurant in New York's Jumeraih Essex House hotel which received the Red Guide's three stars but closed in 2007. In 2008, he opened Adour, at the St. Regis Hotel and plans to open Bistro Benoit New York.

Alain Ducasse is one of the most influential Chefs in the US according to the 2005 Forbes List and his Alain Ducasse Group of restaurants, Inns, cooking schools, cookbooks, and consulting activities won him a place at the 2008 Ten Top Earning Celebrity Chefs List by Forbes.

Chef: Jean-Georges Vongerichten

1 Central Park W, New York, NY 10023, United States, Tel: 01 212-299-3900

Alsatian chef Jean-Georges Vongerichten is one of the leading chefs in the US. His first attempt at the Lafayette in the Drake Swissotel earned him four stars from The New York Times and in 1991 he opened his bistro "Jo Jo", named Best New Restaurant of the Year by John Mariani in Esquire and earned three-stars from The New York Times.

Vongerichten owns restaurants all around the world: in London, Paris and Shanghai- Vong, "**Mercer Kitchen"** at the Mercer Hotel in Soho and **"Prime",** a steakhouse located in Bellagio Hotel Las Vegas, as well as New York's three- Michelin starred **"Jean George's" restaurant.**

He has also been awarded three medals at the James Beard Restaurant Awards: **Best New Restaurant, Outstanding Chef**, **Who's Who** of Food & Beverage and published many cookbooks including "Cooking at Home with a Four-Star Chef" and "Simple Cuisine".

Chef: Anthony Bourdain

Bloomsbury Publishing, London, W1D 3QY

Anthony Bourdain has written 2000 New York Times bestselling book "Kitchen Confidential: Adventures in the Culinary Underbelly" and two more New York Times bestselling nonfictions books:" A Cook's Tour" (2001) and "The Nasty Bits" (2006).

Anthony Bourdain is a **"Chef-at-Large" whose home base is Brasserie Les Halles and a host of Travel Channel's culinary and cultural adventure program Anthony Bourdain: No Reservations.**

Chef: Wylie Dufresne

Tel: 212-477-2900

Wylie Dufresne is the chef and owner of "wd-50 restaurant" in Manhattan which opened in 2003. Food & Wine magazine named him one of 2001 America's Ten Best Chefs award and according to the 2005 Forbes List he is one of the most influential Celebrity Chefs in the US. He has also been awarded a Michelin star.

Chef: Eric Ripert

536 Broadway, 11th Floor, New York, NY 10012, Tel: 01 (917) 595-2221, E-mail: justin@anomaly.com

Eric Ripert is the French Chef who succeeded Gilbert Le Coze as "Le Bernadin's" executive chef. In 1995 he earned a four-star rating from the New York Times and in 2006 the maximum 3 Michelin stars.

He is **the Chair of City Harvest's Food Council, and President of the Jean Louis Palladin Foundation**. He also owns "**Le Westend Bistro by Eric Ripert" at the Ritz-Carlton** in Washington, **the restaurant "10 Arts"** in Philadelphia and **a series of brief online cooking videos called "Get Toasted"** on his website AVECERIC.com.

Eric Ripert is the cookbook author of "Le Bernandin CookBook", "A return to Cooking" and "On the Line" and has been awarded the Top Chef in New York City award by James Beard Foundation.

Chef: Nobuyuki "Nobu" Matsuhisa

Nobu New York, 105 Hudson Street, New York, NY 10013, Tel: 212.219.0500, Fax: 01 212.219.1441, E-mail: newyork@noburestaurants.com

Nobu Matsuhisa

Nobuyuki "Nobu" Matsuhisa is an international celebrity chef and restaurateur. Nobu is known for his **fusion cuisine** which blends traditional Japanese dishes with **South American** ingredients. Nobu is the co-owner along with **Robert De Niro**, and the executive chef of **Nobu New York** in **New York City**.

Chef: Wolfgang Johann Puck

176 North Canon Dr. Beverly Hills, California 90210, Tel: 310-385-0880, Fax:310-385-9690

Wolfgang Puck

Wolfgang Johann Puck is an Austrian celebrity chef based in Los Angeles who owns Wolfgang Puck Companies (Wolfgang Puck Fine Dining Group, Wolfgang Puck Worldwide, Inc. and Wolfgang Puck Catering). When he moved to Los Angeles, he became chef and part owner at "Ma Maison restaurant" and published his cookbook "Modern French Cooking for the American Kitchen", in 1982 he opened his restaurant "Spago". He is the official caterer for the Academy Awards Governors Ball and hosted "Cooking Class with Wolfgang Puck" on the Food Network. His Puck-Lazaroff Foundation supports the Annual Wine & Food Festival. In 2002 Puck received the 2001-2002 Daytime Emmy Award for Outstanding Service Show, *Wolfgang Puck*.

Chef: Charlie Trotter

Charlie Trotter's, 816 West Armitage, Chicago, Illinois 60614, Tel: 01 773 248-6228, E-mail: info@charlietrotters.com

CHARLIE TROTTER'S

Charlie Trotter is a famous chef, who owns many restaurants in the US. Apart from "Charlie Trotter's restaurant", he owns "Trotter's To Go Express", a

simplified delicatessen and a seafood restaurant, opened in Los Cabos, Mexico.

He is also an investor and brand name behind a seafood restaurant at the Palazzo casino in Las Vegas called "Restaurant Charlie" and helps inspire meals for United Airlines.

Chef: Hubert Keller

777 Sutter St., San Francisco, California Tel: 01 415-673-7779

Huber Keller became co-owner and executive chef of the original "Fleur de Lys" (San Fransisco) in 1986. He owns another "Fleur de Lys" and the "Burger Bar" in Mandalay Bay Resort and Casino, in Nevada. Keller is alos the consulting chef at the Club XIX in California and is the author of "The Cuisine of Hubert Keller". In 1997 he won the James Beard Foundation award for best chef in California, and in 1998 he was named as one of the "10 best new chefs in America" by Food & Wine Magazine.

TV Chef: Tom Colicchio

NBC/Universal, 3000 W. Alameda Ave., Suite 25, Burbank, CA 91523

Tom Colicchio is an accomplished chef; recipient of 5 James Beard Medals and **the head judge of the Bravo Reality TV show Top Chef**. He has co-founded and was the executive chef of the Gramercy Tavern in New York until 2006.

He has also founded and co-owns the Craft restaurants and is a partner with Or Die Networks[5]. Some of his books include "Think Like a Chef", "Craft of Cooking", "Top Chef The Cookbook".

TV Chef: Gordon Ramsay

151 West 54th Street, New York, NY 10019 212 468 8888

Gordon Ramsay's restaurant "Gordon Ramsay at the London" opened in

[5] Eatdrinkordie.com is a site dedicated to hosting entertaining, instructional food videos

New York and won him the top newcomer's award by Zagat guide. In 2007, he opened his first Irish restaurant; "Gordon Ramsay at Powerscourt" at the Ritz-Carlton Hotel and in 2008 he opened his first West Coast restaurant in Los Angeles.

Gordon Ramsay is the best British Chef with **twelve Michelin stars In the United States he is known as the host of FOX's "Hell's Kitchen" and of "Kitchen's Nightmares".**

TV Chef: Alton Brown

Alton Brown is an American food personality and author. In 2005 he was named Best Food Guru by Atlanta magazine in 2005.

He is the creator and host of the Food Network television show Good Eats and the miniseries Feasting on Asphalt and Feasting on Waves. He is also the main commentator on Iron Chef America, a regular contributor to Bon Appétit and Men's Journal magazines and the author of several cooking how-to books.

TV Chef: Rachael Ray

Website contact form

Rachael Ray is a television personality and author who was featured in the 2008 Forbes Top Ten-Earning Celebrity Chefs. She is hosting two Food Network series, "30 Minute Meals" and "Rachel Ray's Tasty Travels".

Before she started hosting her own lifestyle program "**Rachel Ray**" with Oprah Winfrey as her producer, she hosted two other Food Network shows "$40 A Day" and "Inside Dish". She has written a series of cookbooks based on "30 Minute Meals" and in 2006 she launched her magazine, "Every Day with Rachael Ray".

TV Chef: Paula Deen

Website contact form

Paula Deen is an Emmy-Award winning American cook and owner of "The Lady & Sons" restaurant in

Savannah, named "International Meal of the Year" by USA Today in 1999.

In 2002, she was given her own show: "Paula's Home Cooking" by Food Network and in 2008 she aired "Paula's Best Dishes". She has published five cookbooks ("The Lady & Sons Savannah Cooking 1&2) and runs a lifestyle magazine called "Cooking with Paula Deen"

TV Chef: Mario Batali

E-mail: dpurcell@mariobatali.com

Mario Batali is a famous TV chef and owns several restaurants with his business partner, Joseph Bastianich: the Michelin star winning "Babblo Ristorante e Enoteca", "Lupa", "Esca", "Otto Enoteca Pizzeria", "Casa Mono", "Bar Jamon", "Bistro Du Vent" (2004, closed in 2006), "Del Posto", "Enoteca San Marco" and B&B Ristorante and a shop named "Italian Wine Merchants". After the Food Network cancelled his cooking show "Molto Mario", Mario Batali decided not to make any further appearances on the "Iron Chef America" and signed a contract with PBS for the cooking show " Spain…on the road again".

Mario Batali has received many awards: a Michelin Star, three Stars from The New York Times for "Babbo Ristorante e Enoteca", "Man of the Year" in GQ's chef category in 1999 , "Best Chef: New York City" from the James Beard Foundation in 2002, and "All-Clad Cookware Outstanding Chef Award" from the James Beard Foundation in 2005.

TV Chef: Rocco DiSpirito

Website contact form

Rocco DiSpirito is an American celebrity chef and cookbook author. In 2003 and 2004, DiSpirito was the subject of the NBC reality TV show "The Restaurant". He owned and runned "Union Pacific Restaurant" in Manhattan from 1997 till 2004 and he currently hosts a TV show called "Rocco gets Real" on A&E.

He has received many awards, including **America's Best New Chef by Food and Wine Magazine, Most Exciting Young Chef by Gourmet Magazine**. His book "**Flavor" has been awarded the James Beard Foundation Award**, other books of his are: "Rocco's Real-Life Recipes", "Rocco's Italian American" and "Rocco's Five Minute Flavor".

Gastronomy Expert: Kate Heyhoe

Forkmedia LLC, PO Box 2261, Wimberley, Texas 78676-2261, E-mail: egg@globalgourmet.com

In 1995 Kate Heyhow developed food sites for America Online in 1996 launched The Global Gourmet website at www.globalgourmet.com which merged into the Global Gourmet in 1998. She is currently Executive Editor of The Global Gourmet and she has been a member of the International Association of Culinary Professionals (IACP) since 1994.

Kate Heyhow is an American editor and author who co-founded one the first websites dedicated to food and cooking: the electronic Gourmet Guide.

Gastronomy Expert: David Rosengarten

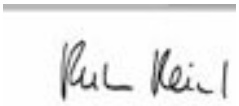
Salt Pig Publishing, LLC, 1750 Old Meadow Road, Third Floor, McLean, VA 22102, Tel: 703.394.4931, E-mail: feedback@davidrosengarten.com

David Rosengarten hosts TV programs on the Food Network and is the author of the award-winning cookbook, Taste, based on his TV cooking show of the same name. He has also written about food, wine and travel for Gourmet, The New York Times, Food & Wine, The Wine Spectator, Newsday, Bon Appétit, Harper's Bazaar, House Beautiful, Business Week, Metropolitan Home, The New York Daily News, The New York Observer, Expedia Travels, Cigar Aficionado, among many other publications and is also the author of The Dean & DeLuca Cookbook. Currently, David is the editor-in-chief of The Rosengarten Report, a newsletter covering the most undiscovered food products, restaurants, wines and travel destinations in the world.

David Rosengarten is one of the world's foremost authorities on food, wine and cooking. He is also a travel writer, cookbook author and TV journalist.

Gastronomy Expert: Ruth Reichl

N/A



Ruth Reichl is a food writer, the editor-in-chief of Gourmet magazine, co-producer of PBS's **Gourmet's**

Diary of a Foodie, and culinary editor for the Modern Library.

She has written three best-selling books of memoirs: Tender at the Bone: Growing Up at the Table, Comfort Me with Apples: More Adventures at the Table, and Garlic and Sapphires: The Secret Life of a Critic in Disguise.

Wine Critic: Robert Parker

eRobertParker.com, LLC, P.O. Box 311, Monkton, MD 21111, E-mail: wineadvocate@erobertparker.com.

Robert Parker is one of the most leading U.S. wine critics. His unique style of rating on a 100-point scale and his tasting notes in his newsletter The Wine Advocate, have influenced modern American wine criticism.

Food Critic: Gael Greene

N/A

Gael Greene is a famous American food critic. **Greene was the New York magazine's chief restaurant critic from 1968 to 2002.** After that, she wrote a weekly column called "Insatiable Critic." She recently lost her job due to the financial crisis

Gastronomy Expert: Patricia Wells

E-mail: email@patriciawells.com

Patricia Wells is a cookbook author and teacher. Her book Patricia Wells at Home in Provence (1996) won the James Beard Award for Best International Cookbook. Wells is the only American and the only woman to be a restaurant critic for a major French publication, L'Express.

Influential Personality: Oprah Winfrey

Website contact form

Oprah Winfrey is one of the most influential figures in the US. She runs a high circulation magazine (as of June 2004, its average paid circulation was over 2.7 million

copies), the **O, The Oprah Winfrey Magazine** with a detailed food section.

Additional catalysts for the US market

Gastronomy and wine catalysts for the US presented under this section have been identified during the course of the project by members of the project's experts groups.

Media

Wine Media: International Wine Cellar

P.O. Box 774, Narberth, PA 19072, Tel: (610) 664-2026, Fax: (610) 664-7185, E-mail: wacs@wineaccess.com

Stephen Tanzer is a wine editor and a celebrated wine-expert. He is the publisher of the bimonthly International Wine Cellar. Apart from the US, the magazine is published in another 34 countries. It is the first wine magazine translated in French and Japanese.

Stephen Tanzer has also written articles for Forbes FYI and Food & Wine Magazine. He tastes annually more than 10.000 wines, discussing with other wine experts from all over the world about collecting and investment advice, techniques and developments of the industry.

Wine Media: Wine Squire

PO Box 70135, Bellevue, WA, 98005, US, Tel: 425 641 7764, Fax: 425 653 5991, E-mail: scottmi@msn.com

This is a website providing information and reviews about local wines. The aim of the magazine is to assist consumers to have an integrated outlook on wines. Wine Squire is a Seattle based local wine guide, also doing business in Washington. The website provides information about all kind of wines from the USA, Italy and France.

John W. Schultz is the president, who has also worked for Gallo. He has 22 years of experience in the wine industry in several positions, which adds to his credibility as a wine critic.

Gastronomy Media: Food Arts

M. Shanken Communications, Inc., 387 Park Avenue South, New York, Tel: 212-684-4224

FOOD ARTS AT THE RESTAURANT AND HOTEL FOREFRONT

The magazine offers a variety of information in several culinary subjects. The publication has authoritative coverage of trends and industry news which include the latest and hottest restaurant openings, business-building tips from colleagues, menu and food trends, how-to culinary demos, tabletop and equipment innovations, marketing ideas, and recipes. It is published 10 times a year.

The magazine has a wine report which provides information about trends of the industry. Industry experts and specialists add to the credibility of the magazine.

Lifestyle Media: Village Voice

36 Cooper Square, New York, NY 10003, Tel: 212-475-1978, Fax: 212-475-8473

the village VOICE

The Village Voice is a free weekly newspaper in City featuring investigative articles, analysis of current affairs and culture, arts reviews and events listings for New York City. It is also distributed throughout the USA on a pay basis. The newspaper also presents reviews about wines and restaurants.

Blogs

Wine Blog: Vinography

E-mail: alder@vinography.com

VINOGRAPHY

Vinography began in 2004 as a personal project for founder and editor Alder Yarrow. The site is now a respected source for non-mainstream wine writing, and one of the most influential wine blogs on the Internet. Featuring wine and sake reviews, restaurant reviews, editorials, book reviews, wine news, and wine event coverage, Vinography publishes new content daily to a global readership.

It is important to note that this blog does not accept advertising from wineries, winegrowers, or wine production companies. It has won the award of Best Overall Blog and Best Writing at the American Wine Blog Awards 2009.

Wine Blog: Doctor Vino

Website contact form

Doctor Vino is a wine blog, reviewing several wines and commenting on other industry matters Tyler Colman's articles and reviews (Doctor Vino) have also appeared in print in Food & Wine, Wine & Spirits, the New York Times, and The Guardian. He is a teacher at wine classes at New York University and the University of Chicago.

The blog has won the awards of Best Wine Blog and Best Wine Blog Writing at the American Wine Blog Awards 2007. Tyler Colman has published his first book, Wine Politics: How Governments, Environmentalists, Mobsters, and Critics Influence the Wines We Drink.

Wine Blog: The Pour

Website contact form

The Pour is the New York Times wine blog. Eric Asimov, chief wine critic, discusses the pleasure, culture and business of wine, beer and spirits.

Eric Asimov is the chief wine critic of The New York Times, a position he assumed in June 2004 after having covered wine with The Times' tasting panel and in his Tastings column for the Dining section.

Wine Blog: Fermentation

E-mail: thomas@warkcommunications.com

Fermentation is a daily wine blog which discusses every possible issue in the wine industry. Tom Wark is the blogger who created and manages the blog.

Tom Wark is public relations professional working in the wine industry and a partner at Wark Communications. Since 1990 he has helped in small and medium sized wineries, media companies and other wine-related firms work their messages into the public sphere.

Wine Blog: In Vino Veritas

E-mail: barola@alicefeiring.com

In Vino Veritas is Alicia Ferling's blog. It is a blog discussing issues about the wine industry. Alicia Ferling is a wine writer, who has published articles in The New York Times. She has also won a James Beard award for an article she wrote for the New York Times.

Institutions

Wine Academy: Culinary Institute of America

Johnson & Wales University, 8 Abbott Park Place, Providence, RI, 02903, Tel: 1-800 598-1000

The Culinary institute of America (CIA), in New York, is a famous school, an academy of food and wine talents.

Notable alumni of the institute are Todd English, Roy Yamaguchi and Duff Goldman.

Wine Academy: Johnson & Wales University

8 Abbott Park Place, Providence, Rhode Island 02903, Tel: 1-800-598-1000

Johnson & Wales University is well known for its Culinary Arts program as well as its business and hospitality programs. The university is the largest food service educator in the world.

Notable alumni of the institute are well-known celebrity chefs like Tyler Florence, Anna Olson, Amy Sacco and Emeril Lagasse.

Restaurants & Bars

Restaurant: Molyvos

Neighbourhood: Manhattan/Theatre District, 871 7th Avenue
(between 55th St & 56th St), New York, NY 10019, Tel: (212) 582-7500

Molyvos is a Greek restaurant and belongs to the Livanos Restaurant Group. Executive chef is James Bostacos, a well-

known chef. The restaurant was on the top 100 restaurants in 2000 according to Time Out New York.

In the Livanos Restaurant Group, there are also Oceana (sea food restaurant), Abbocatto (Italian restaurant), City Limits (gourmet restaurant) and Burger Deluxe (burger restaurant)

The restaurant is rumoured to have the best Greek cuisine in New York.

Restaurant: Anthos

Manhattan - 36 W 52nd St, New York, NY 10019, USA – Midtown, (212) 5826900, E-mail: melissa@anthosnyc.com

Anthos is a Greek restaurant owned by Donatella Arpaia and Michael Psilakis, two top thought restaurateurs, combining Greek and Italian modern cuisine. The venue has been designed by Matthew Suddock and is an impressive glass construction.

The restaurant has received very good reviews from, Time Out New York and The New York Post and The New York Times.

Restaurant: Mia Dona

206 East 58th Street, New York, NY 10022, Tel: 212-308-0830

This is a restaurant at the same wavelength as Anthos, created by the successful cooperation between Michael Psilakis and Donatella Arpaia. This restaurant is not as expensive as Anthos, and its dishes are characterised by a simplicity concept. The restaurant has also received very good reviews from The New York Times.

The way the New York Times put is is that *if Anthos is a Cadillac, then Mia Dona is a Buick.*

Restaurant: Kefi

505 Columbus Avenue, New York, NY, 10024, Tel: 212 873 0200**http://www.foodarts.com/Foodarts/Home/**

Kefi is a traditional Greek Restaurant, the old Onera, where Chef Michael Psilakis, creates traditional Greek

dishes for the fans of Greek cuisine. The restaurant also offers a large variety of Greek wines. Generally, it is an average-priced restaurant, with very good quality food.

Kefi is a most traditional Greek restaurant, offering classic, delicious dishes to the customers that a "taverna" can offer.

Restaurant: BLT

106 East 57Th St, New York, New York 10022, Tel: 212 752 7470

BLTRESTAURANTS.COM

BLT is a large bistro chain with many restaurants all over the USA. The chef is Laurent Tourondel, a top French-educated chef who has seen through the chain's success.

The Bistro Laurent Tourondel is a chain of bistro restaurants, the BLT Steak, BLT Fish, BLT Prime, BLT Market, BLT Burger, BLT Fish and Fish Market. These five bistros vary in price and style depending.

Restaurant: Chanterelle

2 Harrison Street, NYC, Tel: 212-966-6960

CHANTERELLE

Chanterelle is a well-known restaurant, very elite, offering modern cuisine gourmet dishes. Since 2000 the restaurant has won several prizes and has received very good reviews by well-known experts.

The restaurant combines a very friendly and simple environment with art-deco designs by American artists, such as Roy Lichtenstein, Cy Twombly and Jennifer Bartlett.

Restaurant: Ducasse (Adour)

2 East 55th Street at Fifth Avenue, New York, NY 10022, Tel: 212.710.2277, Fax: 212.350.8722

adour

Adour is the restaurant of the well-known Hotel St.Regis in New York and it is wine-based It combines Alain Ducasse's art in culinary matters and the talents of chef Joel Dennis and wine director Thomas Combescot.

The restaurant has been designed by David Rockwell and his Group. It is a classic, elite, modern cuisine restaurant. It has received very good reviews from several well-known media.

Restaurant: Bar Jamon

125 E. 17th St., New York, NY 10003, at Irving Pl., Tel: 212-253-2773

Bar Jamón serves the Iberico hams from which it takes its name, carved on antique Berkel slicers. Bar Jamón also serves bocadillos, conservas, an extensive cheese selection and addictive churros y chocolate.

Bar Jamón boasts a wine list of nearly 600 wines, representing all that is of quality in the rapidly expanding world of Spanish Wine. The wine list was awarded the Wine Enthusiast Magazine Award of Unique Distinction in 2007, and has earned The Wine Spectator's Award of Excellence for 2005 through 2007. It was recently awarded with The Wine Spectator's Best of Award of Excellence for 2008, as well as being rated 9.5 out of 10 in the Spanish wine magazine Sibaritas.

Restaurant: Inoteca

98 Rivington St, New York, NY 10002, USA, Tel: 212 614 0473, Fax: 212614 0637

Inoteca is a classic regional Italian wine bar with an extensive selection of Italian wines. The wine list has over 600 selections by the bottle and 25 by the glass or half carafe; representing every wine making region in Italy as well as older vintages and varietals not commonly found outside of Italy.

The restaurant is owned and operated by Jason Denton, Joe Denton and Chef Eric Kleinman. The restaurant has very good reviews from well-known experts.

Restaurant: Craft

43 east 19th Street New York, New York, Tel: 212-780-0880, E-mail: info@craftrestaurant.com

Craft is a steakhouse focusing on beef. In particular this restaurant focuses on aged beef and the varieties of the tastes and flavours depend on the dressings and the toppings of the dish. It is considered to be a place where friends can hang out.

The restaurant has a large variety of wines, from many countries, and its chef is Tom Colicchio. The architecture is the award-winning work of Bentel and Bentel.

Restaurant: CRU

24 5th Avenue, New York, NY 10011, Tel: +1 212 529 1700, Fax: +1 212 529 6300

Chef Shea Gallante offers the world's greatest wine list and the cuisine to match it. Chef Shea Gallante's modern European cuisine, rooted in classic technique, incorporates the best seasonal ingredients available; from raw crudo flown in from Japan, to the pastas made in-house daily.

Shea Gallante was in 2005 the best new chef in New York, being awarded from Food and Wine and Star Chefs.

Restaurant: Thalassa

Tel: 212.941.7661, Fax: *212.941.9557, E-mail:* fish@thalassanyc.com

Thalassa is a Tribeca hot spot which serves rare seafood and organic produce. It has been awarded 3 stars from Forbes and is the recipient of the Wine Spectator Award of Excellence for having the most extensive and exclusive Greek wine list in the city including a 5,000 bottle wine cellar with special offerings from France, the US and around the world.

It is designed by Jean Pierre Heim, who recreates the memories of his luxurious travels through the Greek islands. For decades fine Greek olives and cheeses were warehoused in this now ultra-chic location.

Restaurant: Gramercy Tavern

42 East 20th Street, New York, NY, 10003, Tel: 212-477-0777, E-mail:info@gramercytavern.com

This is a restaurant offering American cuisine. It has been an one Michelin star restaurant since 2005. The restaurant has a collection of special and classic wines.

Executive chef is Mark Anthony, who before GT was executive chef in Blue Hills and previously had been a student of Shizuyo Shima, at Bistro Shima.

Bar: Bar Veloce

176 7th Ave, New York, NY 10011, USA, Tel: 212 260 3200, E-mail: info@barveloce.com

Bar Veloce is an Italian-style paninoteca (Panini bar) with a modern wine bar. The bar promotes itself as a "bar", not a cafe, not a restaurant. The owner and visionaire, Frederick E. Twomey, created his first Bar Veloce in London.

The wines are more unique, more sought after than an average bar and represent the diverse spectrum of Italy's territory. The food, though not hyper gourmet, is made from the finest Italian products and is barely manipulated in order to bring forth the freshest of flavour.

Influential Personalities

Chef: Todd English

1 First Avenue, Suite 206, Box 1, Charleston, MA, 02129, Tel: (617) 242 9715, Fax: (617) 242 1333, E-mail: contact@toddenglish.com

Todd English is a celebrity chef, restaurateur, author, entrepreneur, and television star based in Boston, Massachusetts, United States. He is best known for his cooking show, Cooking With Todd English, which appears on public television and is produced by Connecticut Public Television; and for his flagship restaurant, Olives, located in Charlestown, Massachusetts. Other restaurants that Todd English is involved are Beso in Los Angeles, Tuscany in Connecticut, Kingfish Hall and Bonfire in Boston and the Todd English restaurant in the Queen Mary 2.

Wine Expert: Steve Olson

295 Greenwich St., #376, NY, NY 10007 U.S.A., E-mail: winegeek@akawinegeek.com Tel: 212.766.GEEK, Fax: 212.766.2068

Steve Olson or the "Wine Geek' has been the host of several trade, education and product information videos as well as co-host (with Andrea Immer Robinson) of Quench, the Food Network's weekly program that celebrates the world of beer, wine, and spirits. He currently co-hosts the AOL downloadable video program,

Spirit Basics, which takes an in-depth look at the history, production, and uses of the world's leading spirits.

Olson may be best known in the industry, however, for his restaurant consulting, having designed the innovative beverage programs and service systems for several nation-wide acclaimed restaurants, including the Mayflower Inn in Connecticut, Gramercy Tavern; Chelsea's acclaimed Mexican restaurant, Sueños, the Borgata Hotel Casino and Spa in Atlantic City; the Adam Tihany-designed Summit at the Mobil 5-star, AAA 5-diamond BROADMOOR in Colorado Springs.

Wine Expert: Doug Frost

Website contact form

Doug Frost, wine consultant and writer, is one of only three people in the world to hold both Master Sommelier and Master of Wine titles. According to USA Today, *"Frost likely knows as much as anyone in the world about how to make, market, serve and identify wines."*

Frost is the host of Check Please!, a weekly public TV show filmed in Kansas City. Frost is also the wine and spirits consultant for United Airlines worldwide, helping to select tens of thousands of cases of wines and spirits each year.

Wine Expert: Kim Marcus

M. Shanken Communications, 387 Park Avenue South, New York, NY 10016 , Tel: 212-684-4224, E-mail: wsonline@mshanken.com.

Kim Marcus is the Managing Editor and a member of the tasting panel of "Wine Spectator", one of the most well-known wine web sites in the US.

Kim Marcus joined the Wine Spectator staff in San Francisco in 1988 and was reassigned to New York in 1993. He has been a regular taster since 1990. He is specialising in Greek, Austrian, Portuguese and southern France wines.

Wine Editor: Steve Tanzer

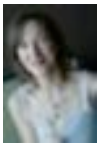
P.O. Box 774, Narberth, PA 19072, Tel: (610) 664-2026, Fax: (610) 664-7185, E-mail: wacs@wineaccess.com

Stephen Tanzer has served as Senior Editor and wine columnist for Food & Wine magazine and wine columnist for Forbes. He wrote

the 1998 and 1999 editions of Food & Wine Magazine's Official Wine Guide. Stephen Tanzer's International Wine Cellar is a critically acclaimed bi-monthly journal read by wine lovers in 28 countries.

Wine Critic: Tara Q. Thomas

Email: web-reader-mail@TaraQThomas.com



Tara Q. Thomas is a wine writer. She has recently published "The The Complete Idiot's Guide to Wine Basics". She is a Senior Editor at Wine & Spirits, as the wine critic for wines of the Mediterranean

Thomas has been voted as the best wine critic working in a newspaper by the Colorado Vive and she contributes frequently at the Gourmet.com blogs.

Wine Critic: Joshua Wesson

PO Box 70135, Bellevue, WA, 98005, US, Tel: 425 641 7764, Fax: 425 653 5991, E-mail: scottmi@msn.com

Joshua Wesson is author to several books for wine, specialising on how to combine the right food with the right wine. Former chairman and executive wine director of Best Cellars, Inc., he has enjoyed a long and successful career in the food and wine industry as a sommelier, consultant, author, and retailer. In 1984 he was named "Best Sommelier in America" by Food & Wines from France.

Best Cellars Inc. is a subsidiary of The Great Atlantic & Pacific Tea Company, Inc. since 2007.

Fairs and Events

Event: Society of Wine Educators Annual Conventions

1212 New York Ave. NW, Ste. 425 Washington, DC 20005 USA¸ **Tel:** (202) 408-8777, **Fax:** (202) 408-8677, **E-mail:**lairey@societyofwineeducators.org

The Society of Wine Educators is a non-profit educational organization with a mission to advance wine education through professional development and certification. The society provides

education programs, seminars. The organisation hosts occasionally conferences and events aiming to teach the student about wines.

Event: Santé Restaurant Symposium

On-Premise Communications, Inc., 100 South St., Bennington, VT 05201, Tel: 8024426771 f 802.442.6859, E-mail: mvaughan@santemagazine.com

The Santé Restaurant Symposium is an annual educational comprehensive conference uniting the elite of the on-premises world with their top suppliers and service providers and offering a perfect platform for fulfilling Santé's mission to be the premier provider of food, wine, spirits, and management content for restaurant professionals.

In 2009, the event will take place at The Sagamore, Bolton Landing, NY, from 26 April2009 to 29 April 2009.

Event: Culinary Institute of America, The Worlds of Flavor

1946 Campus Drive, Hyde Park, NY 12538-1499, Tel: 1-800-888-7850 or 845-452-2230

The Worlds of Flavor takes place annually, attracting specialists from the food industry, chefs, owners of restaurants, corporate menu decision-makers, foodservice management executives, suppliers, journalists, every possible stakeholder. In 2008, the event took place during 6-8 November in Napa Valley campus, California.

Germany

Media

Wine Media: Wein-Plus

Wein-Plus GmbH, Wetterkreuz 19, D-91058 Erlangen, Tel: +49 1803-151505 Email: info@wein-plus.de

Wein-Plus is one the largest independent Internet portals for wine lovers worldwide. It does not trade wine and is not connected to wine merchants or producers. The site contains a wine glossary with over 13,000 entries, a Wine Forum with more than 40,000 participants, wine guides for many European countries including Greece, daily news and other features. **Wein-Plus receives approximately 200,000 unique visitors each month and has more than 130,000 registered users.** The Microsoft Encyclopedia mentions Wein-Plus as one of the leading internet destinations for wine information.

Wine Media: Weinwelt

Tel: 06321-890843, E-mail: grosche@meininger.de

Weinwelt is a monthly magazine, aimed at the wine lovers. The magazine includes wine reviews, recommendations, and tips concerning all aspects of wine. Weinwelt also features lifestyle-orientated topics, such as travel, gastronomy, top cigars and spirits, as well as interviews with celebrities. **Weinwelt has a circulation of over 40,000 issues and its readers are considered very loyal to the magazine.**

Wine Media: Wein Markt

Werner Engelhard, Tel. +49/61 31/62 05 12, E-mail: w.engelhard@fraund.de

Wein Markt is a monthly magazine aimed at the wine merchants and wine producers in Germany. The magazine deals with current industry topics, wine market data analysis and includes articles about wine storing and distribution. Wein Markt also organizes tasting events awarding the best

wines from Germany and other countries. **It has a circulation of over 8,000 issues per month.**

Wine Media: Der Deutsche Weinbau

Tel.: 0 63 21 - 89 08 62, Fax: 0 63 21 - 89 08 21, E-mail: kimmle@meininger.de

Der Deutsche Weinbau is the official publication of the German Viniculture Association and its member associations. The journal includes articles on wine-growing, wine marketing and winery technology. Every second issue of Der Deutsche Weinbau includes the newsletter Der Oenologe which is published by the Federation of German Oenologists and graduates from the Geisenheim Faculty of Viniculture and Beverages Technology. **The journal is published bi-weekly and it is aimed to those working in the fields of viniculture, oenology and beverages technology. It has a circulation of over 7,000 issues.**

Wine Media: Merum

E-mail: mb@merum.info

Merum it is the only magazine aimed at Italian wine and food lovers in Germany. Merum content includes Italian wine reviews, reports about the wine regions in Italy and articles about the Italian agriculture and olive oil. Every year Merum presents over 2,000 Italian wines. **Merum is an independent magazine, published bimonthly. The average circulation is 9.500 issues.**

Wine Media: Der Feinschmecker

Website contact form

Der Feinschmecker is one of the oldest and most famous gastronomy magazines in Germany. The magazine is focused on fine cuisine, wine reviews and the content also includes lifestyle and travel articles. Der Feinschmecker publishes an annual guide of the best restaurants in Germany and hosts the prestigious "Chef of the Year" awards.

Gastronomy Media: Gault Millau

E-mail: leserservice@gaultmillau.de

Gault Millau is one of the most influential restaurant guides. Gault Millau is most famous for its rating system, on a scale of 1 to 20. The German version is published bi-monthly and the content includes restaurant reviews, food and wine matching tips, gastronomy articles and chef interviews.

Gastronomy Media: Selection

Website contact form

Selection is a considered as one of the leading wine and food magazines in Germany. Selection's content includes reviews of wines and food, recipes, presentation of wine regions and gift ideas. The magazine is published 4 times per year and the average circulation is 50,000 issues.

Gastronomy Media: A La Carte

E-mail: info@klocke-verlag.de

A La carte is published bi-monthly and its content includes gastronomy and wine guides, recipes and tips on hotels and travel.

Gastronomy Media: Stern

Website contact form

Stern is a leading weekly news magazine. In its contents it has published articles about gastronomy and wines. The magazine's circulation may reach 1,000,000 issues.

Lifestyle Media: ELLE

Arabellastr. 23, 81925 München, E-mail: sabine.glasauer@elle.burda.com

The German edition of Elle magazine has published wine guides and gastronomy articles. The magazine deals mainly with

fashion, lifestyle and beauty. The online version of ELLE receives approximately 200,000 visits per month.

Lifestyle Media: Freundin

Freundin Verlag GmbH, Abo-Service, Postfach 290, 77649 Offenburg, Tel: 0 1805 / 34 88 35, Fax: 0 18 05/25 95 35, Email: freundin@burdadirect.de

Freundin is a popular women's magazine. The content mainly includes lifestyle and fashion articles. **The magazine has published wine reviews, gastronomy articles and recipes.** The online version of Freundin receives approximately 460,000 visits per month.

Lifestyle Media: Brigitte

Tel: 040/3703-0, Fax: 040/3703-5679, E-mail: infoline@brigitte.de

Brigitte is one of the leading lifestyle magazines in Germany. It mainly aims the female population of the country and the content includes report on fashion, beauty, travel, home and cuisine. Among the topics there are also articles about psychology, partnership, culture, politics and careers. **Brigitte is published bi-weekly and has a circulation of approximately 770,000 issues.**

Lifestyle Media: Gala

Gala.de, G+J Women New Media GmbH, Schaarsteinweg 14, 20459 Hamburg, Tel: +49 40 3703-4362, Fax: +49 40 3703-4364, E-mail: galade@gala.de

Gala is one of the most famous lifestyle magazines in Germany. Main subject of the magazine is the life of celebrities which are generally presented as role models. The magazine editor prefers to publish good news instead of negative headlines. **Gala is published weekly and has a circulation of over 370,000 issues.** Most of the magazine's readers are women.

Well- being Media: Natur und Heilen

Nikolai str. 5, 80802 München, Tel. 089/380159-10, Fax 089/380159-16

Natur und Heilen main subject is health through natural living. The content includes articles about holistic health, healing practices and recommendations for a healthier lifestyle. Also there are articles about Psychology, organic gardening and ecology. **Natur und Heilen circulation is approximately 90,000 issues per month.**

Media Catalyst: Der Spiegel

Brandstwiete 19, 20457 Hamburg, Tel: 040/3007-0, Fax: 040/3007-2247

Der Spiegel is the largest weekly news magazine in Europe with an average circulation of more than 1,000,000 issues. The content includes articles and interviews about politics, economics, culture and science. The magazine frequently publishes articles about gastronomy.

Restaurants & Bars: Gladbach

Restaurant: Vendome

Grand Hotel Schloss Bensberg, Kadettenstrase, Bergisch Gladbach, 51429, Tel: 00 49 2204 42 0

Vendome is perhaps the finest restaurant in Germany. It has received three Michelin stars and it has also been named "Restaurant of the year" by the prestigious 'Feinschmecker' magazine. Vendome's manager Joachim Wissler was named "Chef of the Year" for 2005. The wine list of the restaurant features over 900 selections and the Sommelier, Romana Echensperger helps the customers to match their food with the right wine.

Restaurants & Bars: Munich

Restaurant: Tantris

Johann-Fichte-Strasse 7, Munich – Schwabing, Tel: 089 3619590 E-mail: info@tantris.de

Tantris is the most famous restaurant in Munich and one of the best in Germany. **It was awarded the title of 47th best restaurant in the world by Restaurant Magazine for 2008.** The chef of Tantris is Hans Haas who was voted as the best chef in Germany for 1994. The famous sommelier Paula Bosch works for Tantris which has over 50,000 wine bottles at its cellar.

Restaurant: Mark's

Neuturmstrasse 1, 80331 Munich, Tel: +49 (89) 290 980, Fax: +49 (89) 222 539, Email: momuc-reservations@mohg.com

Mark's is a famous restaurant in Munich which specializes in international and Mediterranean cuisine. It also offers 400 wine selections from all over the world. **Mark's has won a Michelin star and the prestigious VARTA award Chef's Hat**, and is now listed among the leading gourmet restaurants in Germany.

Restaurants & Bars: Cologne

Restaurant: Vintage

Pfeilstrasse 31-35, Cologne D-50672, Tel: 00 49 221 92 0710, E-mail: info@weinseminare.de

Vintage is considered one of Cologne's best wine bar and restaurants. It offers over 900 wine labels from all over the world and specializes in wine menu offerings where food is matched by the appropriate wine. Vintage also organizes wine seminars led by the owner.

Restaurants & Bars: Berlin

Bar: Rutz

Chausseestrasse 8, 10115 Berlin mitte, Tel: 030.24 62 87 60, Fax: 030.24 62 87 61, E-mail: info@weinbar-rutz.de

Rutz is one of Berlin's most revered wine bars, offering more than 1,000 different wine selections. Rutz is also famous for its fine and was honoured with a star in the Michelin Germany guide for 2008. Rutz is a modern design bar

and mainly attracts young customers. It is managed by the sommelier Billy Wagner

Bar: Weinerei

E-mail: theater@weinerei.com

Weinerei is one of the most famous wine bars in Germany and has been frequently reviewed by the international press. **Weinerei has a unique system of operation. For the price of € 1 the customer rents a wine glass and is entitled to taste all the wines of the bar.** A simple meal is also served in the evenings.

Influential Personalities

Wine Expert: Markus Del Monego

Heinrich-Held-Str. 37, D-45133 Essen, Tel: 00 49 201 84201-30, Fax. 00 49 201 84201-930, E-mail: info@caveco.de

Markus Del Monego is renowned for his wine knowledge. **He is the first person in history that holds the 2 most important wine qualifications: Sommelier World Champion and Master of Wine.** He runs the consultancy service caveCo GmbH, in Essen, Germany.

Wine Expert: Joel Payne

Joel B. Payne is an American who has lived in Germany since 1983. He had been a regular contributor to the wine magazine, Alles-Über-Wein and writes articles for several publications, including Decanter. **His German Wine Guide, co-authored with Armin Diel, has appeared annually for the past 14 years.** Joel Payne was recently appointed editor-in-chief of Wine Business International and is the German member of the Grand Jury Européen.

Wine Expert: Armin Diel

P.O. Box 33670, Seattle, WA 98133-0670

Armin Diel is one of the leading wine writers in Germany. He is co-editor of the German Wine Guide and frequently wrote articles about French and German wines for the wine magazine Alles-Über-Wein. He is also a well

known Riesling producer and owns the estate of Schlossgut Diel in Burg Layen in the Nahe River Valley.

Wine Expert: Stuart Pigott

Website contact form

Stuart Pigott is a British wine critic and author who has lived in Berlin since 1993. He mostly writes in German, and focuses on German wine. **Stuart Pigott writes for the magazines Feinschmecker and Weingourmet as well as the Sunday edition of the Frankfurter Allgemeine Zeitung.**

Wine Expert: Steffen Mouse

Steffen Mouse is an awarded wine journalist who is considered an expert in the German, Australian and Italian wine markets. **He is the author of several books on wine.** His book "Wine" Has been also translated in Greek.

Wine Expert: Marcus Hofschuster

Wein-Plus GmbH, Wetterkreuz 19, D-91058 Erlangen, E-mail: hofschuster@wein-plus.de

Marcus Hofschuster is a well known wine author. **He is the editor of wein-plus wine portal.**

Gastronomy Expert: Jens Priewe

Jens Priewe is a journalist for the gastronomy magazine Der Feinschmecker. **He has received the award "Best Foreign Journalist 2008" by the Comitato Grandi Cru d'Italia in Verona.**

Gastronomy Celebrity: Florian Fischer-Fabian

Website contact form

Florian Fischer-Fabian is a famous journalist who hosts a TV show about health. **He is the author of the "Die Gourmet-Bibel"**

Gastronomy Writer: Hans Eckart Rübesamen

Krahnstr. 1-2, 49074 Osnabrück, Tel: +49(0) 541 - 33 11 50, Fax: +49(0) 541 - 33 11 525, E-mail: inforestaurant-lavie.de

Hans Eckart Rübesamen is a well known travel and gourmet journalist and writer. He works for the gastronomy magazine Der Feinschmecker.

Chef: Thomas Bühner

Thomas Bühner is a famous chef working for the restaurant La Vie in Osnabrück. **He received the award "Chef of the Year 2006" from Der Feinschmecker magazin.**

Chef: Joachim Wissler

Kadettenstr. 2 51429 Bergisch Gladbach, E-mail: infoschlossbensberg.com

Joachim Wissler is the famous manager and chef of Vendome restaurant in Cologne. **He has received numerous awards that include the "Chef of the Year" for 2003 and 2005 from Der Feinschmecker magazin.**

Chef: Klaus Erfort

Gastehaus Erfort, Mainrestase 95, 66121 Saarbucken, Deutchland, Tel: 0049 681 95 82, E-mail: kontakt@ gaestehaus-erfort.de

Klaus Erfort is the chef and manager of the restaurant Gästehaus Klaus Erfort in Saarbrücken. **He received the award "Chef of the Year 2008" from Gault Millau magazine.**

Chef: Sven Elverfeld

Sven Elverfeld is a famous chef who works for the restaurant Aqua in the Hotel Ritz Carlton Wolfsburg. **He has received many awards including the "Chef of the Year 2008" from Der Feinschmecker magazin.**

Chef: Hans Haas

Tel: 49 (0) 8161 / 71 - 44 60, E-mail hans.haas@fh-weihenstephan.de

Hans Haas is the famous chef of the restaurant Tantris in Munich. **He was awarded as Chef of the Year 2008" from Gault Millau magazine and he has also received the European Culture Award in 1999.**

Chef: Dieter Müller

Website contact form

Dieter Müller was presenting German cuisine in the hotels run under the names of Ritz Carlton and Hilton in Japan, Australia, USA and Hawaii, France and Thailand. In 1992 he founded the restaurant Dieter Müller in Schlosshotel Lerbach, Bergisch Gladbach. He received the award "Chef of the Year 1987"

Chef: Tim Mälzer

Büro Tim Mälzer, Körnerstraße 13, 22301 Hamburg, Fax: 040 2780 6395, E-mail: info@tim-maelzer.de

Tim Mälzer is the owner of the restaurant Tim Mälzer in Hamburg. **He is a very influential chef since he is the host of the TV show Schmeckt Nicht**, viewed by 1.5 million people every week.

Chef: Michael Hoffmann

ETH Zürich, CAB G33.1, Universitätsstrasse 6, CH-8092 Zürich, Switzerland, Tel: +41-44-632 73 90, Fax: +41-44-632 10 63, E-mail: hoffman inf.ethz.ch

Michael Hoffmann is the chef and manager of the restaurant Margaux in Berlin and a Lecturer in Paris at the Ecole Superieure de Cuisine Francaise. Among other awards he has received the "Most Creative Chef of the Year 2002" and the "One of the Finest Chefs of the World 2004".

Events & Trade Fairs

Trade Fair: ProWein

Postbox 10 10 06, 40001 Düsseldorf , Tel: +49 (0)211 45 60 01, Infotel: +49 (0)211 45 60-900, Fax: +49 (0)211 45 60-668

ProWein takes place every spring in Düsseldorf and it is the most important wine fair in Germany. ProWein is considered an exclusive club, because only registered trade visitors are allowed entrance. The fair gathers more than 3,000 exhibitors, 700 journalists and 30,000 visitors every year. The next ProWein is scheduled for 29 March 2009.

Trade Fair: Kölner Weinwoche

Members only website

Kölner Weinwoche is one of the most famous wine fairs in Germany and started 30 years ago. It takes place every spring in Cologne and lasts for 12 days. The fair presents wines from the adjacent wine regions. The next Kölner Weinwoche is scheduled for mid of May 2009.

Trade Fair: Forum Vini

Website contact form

Forum Vini International wine fair for private customers and professional visitors. Apart from wines the fair exhibitors present cellar equipment, wine magazines, delicacies and services. The next Forum Vini is scheduled for 13 November 2009.

Additional catalysts for the German market

Gastronomy and wine catalysts for Germany presented under this section have been identified during the course of the project by members of the project's experts groups.

Media

Wine Media: Meininger Group

Maxmilianstr. 7-17, 67433 Neustadt, Tel: 06321-89080, E-mail:contact@meininger.de

Meininger's Wine Business International boasts to be the world's only genuinely international wine trade magazine. With a network of well-known and highly-respected correspondents around the world, it offers decision makers in the international trade an international point of view, backed up by the most important facts and figures, analyses, news, and opinions.

Influential Personalities

Wine Expert: Knoll Rudolf

Website contact form

Knoll Rudolf, an experienced wine-expert, is a German journalist and author of the book ''Vinum''. He is one of the most important wine experts in Germany. He has written more than 20 books about wines and he writes often for several German publications.

Wine Editor: Sievers Jorg

Tel.: 06321-890860, Fax: 06321-890884, E-mail: sievers@meininger.de

Sievers Jorg is a German wine-expert and a purchase leader. At his last book he has written several reviews about South-eastern European wines, from Serbia, Montenegro, FYROM Romania and Bulgaria. Furthermore, he is said to be a wine expert on wines from Germany, France and Greece. He is an editor at WeinWirtschaft, a magazine specialising in wines.

Wine Editor: Rindchen Gerd

Rindchen's Weinkontor GmbH & Co. KG, Ellerhorst 1, 25474 Bönningstedt
Tel: 040 - 55 62 02 0, Fax: 040 - 55 62 02 20

RINDCHEN'S WEINKONTOR

Rindchen Gerd is the chief editor for Weinkontor, a magazine specialising in the wine industry. He is one of the most important influencers in Germany, reviewing numerous wines from all over the world

Canada

Media

Gastronomy Media: EAT Magazine

EAT Magazine, Box 5225, Victoria, BC V8R 6N4, Editorial Director, Tel: 250-384-9042, Website Contact Form

Eat is a bimonthly food and wine magazine. It includes restaurant reviews, award winning recipes, wine recommendations and culinary accessories and books.

Gastronomy Media: Food & Drink

FOOD & DRINK, LCBO, 55 Lake Shore Blvd. East, Toronto, ON, M5E 1A4, e-mail: foodanddrink@lcbo.com

Food & Drink is LCBO's magazine. LCBO is the Liquor Control Board of Ontario (LCBO), whose stores are the only allowed selling hard liquor in Ontario. Currently, the LCBO is one of the world's largest single purchasers of beverage alcohol products. LCBO's Food & Drink magazine has sections with recipes, décor, and entertaining tips.

Gastronomy Media: Asian Gourmet

1830 Ellesmere Road, Scarborough, Ontario, Canada M1H 2V5, Tel: 1(866) 388-1898, e-mail: info@asiangourmetmagazine.com

Asian Gourmet is an Asian cuisine magazine. It hosts recipes, travel features, stories and updates on the latest events and trends in Asian cuisine.

Gastronomy Media: Food for Thought

E-mail: info@gorwingalberta.com

Food for Thought is an Albertan magazine providing recipes and food products tips.

Wine Media: Wine Access

105, 1210 20th Avenue SE, Calgary, Alberta, T2G 1M8, E-mail: agismondi@wineaccess.ca

Wine Access is a six times per year magazine about wine. It also produces the Canadian Wine Annual, a guide to all of Canada's wineries and the Wine Access First-in-Line e-Report, an electronic review of new wine releases in the Ontario market and wine news relevant to wine consumers, importers and producers in Canada. The Buyer's Guide+ is a free electronic newsletter, with a 100 wine tasting notes each month.

Wine Media: Vines

1074 Cooke Boulevard, Burlington, Ontario, Canada L7T 4A8, Tel: 905.634.8003, fax: 905.634.7661, E-mail: info@townmedia.ca

"Vines" is a national consumer magazine about wine. Each issue contains wine reviews and features articles on food and wine, wine travel, and profiles of producers and wine regions.

Lifestyle Media: Chatelaine

One Mount Pleasant Road, Toronto, ON, M4Y 2Y5, Tel: 1/800/268-9119

Chatelaine is a bilingual (English and French) women's lifestyle magazine. It is published on a monthly basis by Rogers Media, Inc. The magazine covers a variety of women's interests, from fashion, beauty and decor, to current affairs, health and food.

Lifestyle Media: Canadian Living

Website contact form

Canadian Living, acquired by Transcontinental Media in 2000, is a monthly Canadian lifestyle magazine, which publishes articles relating to food, fashion, crafts, and health and family advice. The magazine has also produced television series for broadcast on Canadian television channels such as Life Network, HGTV Canada and Food Network Canada.

Lifestyle Media: enRoute

Spafax Canada, 4200 boul. St-Laurent, Suite 707, Montreal, QC, H2W 2R2, Canada, Tel: 1-514-844-2001, Fax: 1-514-844-6001, e-mail: info@enroutemag.net

enRoute is one of Canada's top lifestyle magazines with almost one million readers each month, available exclusively on all Air Canada flights.

Lifestyle Media: Flare

E-mail: Erin.OBrien@flare.rogers.com

Flare is a Canadian fashion magazine, owned by Rogers Communications. Flare was formerly Miss Chatelaine magazine until 1979 when it labelled itself "Canada's Fashion magazine". The magazine covers fashion, health and beauty issues for Canadian women and reaches a monthly circulation of 1.7 million copies.

Lifestyle Media: Toronto Life

Toronto Life, Urban Group, St. Joseph Media Corp Queen Richmond Centre Toronto, ON M5C1S2, e-mail to: editorial@torontolife.com

Toronto Life is a complete guide for the city of Toronto. Toronto Life has restaurant listings and reviews of more than 600 restaurants, arts and entertainment listings and Life's CityGuides.

Variety Media: Reader's Digest

Website Contact Form

Reader's Digest Canada is one of this country's leading direct-marketing companies for more than 55 years. Reader's Digest has a combined paid circulation of 1.2 million copies and an average readership of 8.1 million making one of Canada's most read monthly magazines.

Media Catalyst: The Globe and Mail

The Globe and Mail, 444 Front Street West, Toronto, Ontario, M5V 2S9, Tel: 1-416-585-5000, E-mail: ksiu@globeandmail.com

The Globe and Mail is a Canadian English language nationally distributed newspaper, based in Toronto and printed in six cities across the country. Its weekly readership of 935,000, it is Canada's largest-circulation national newspaper.

Globe and Mail has an extensive **"Food and Wine"** Section where renowned chef Massimo Capra hosts a monthly column.

Media Catalyst: The National Post

1450 Don Mills Road, Suite 300, Don Mills, Ontario, Canada, M3B 3R5, Website contact form

The National Post is a Canadian English-language national newspaper based in Toronto. The paper is owned by CanWest Global Communications and is published every Monday through Saturday.

The National Post publishes a variety of articles on food.

Media Catalyst: Le Devoir

2050, de Bleury, 9ième étage, Montréal (Québec), H3A 3M9, Tel: 1-800-463-7559, E-mail: redaction@ledevoir.com

Le Devoir is a French-language newspaper equivalent to national newspapers such as The Globe and Mail and the National Post. It has only a modest circulation outside of Quebec and tends to focus largely on the events and issues shaping

Québécois society. It is distinguished for being the only independent large-circulation newspaper in Quebec amongst a market dominated by the media corporations of Gesca Limitée and Quebecor.

Le Devoir has a separate section of food and wine called **Plaisirs du Palais.**

Media Catalyst: La Presse

Website contact form

La Presse, founded in 1884, is a large-circulation French-language daily newspaper published in Montreal, Quebec, Canada. It is owned today by Groupe Gesca, a subsidiary of Power Corporation of Canada.

La Presse publishes a wide-ranging food and wine section called **'Vivre'.**

Media Catalyst: Le Journal de Montréal

E-mail: opinions@journalmtl.com

Le Journal de Montréal is a daily tabloid newspaper published in Montreal, Quebec, Canada, and is the largest-circulation French-language newspaper in North America. Established by Pierre Péladeau in 1964, it is owned by the Sun Media division of Quebecor Media.

Le Journal de Montréal has a section on Food and Wine called **"Art de Vivre"**

Media Catalyst: The Toronto Star

Editorial Department, Toronto Star, One Yonge Street, Fifth Floor, Toronto, Ontario, M5E 1E6, Tel: 416-869-4300, Fax: 416-869-4328, Email: city@thestar.ca

The Toronto Star is Canada's highest-circulation newspaper. It is owned by Toronto Star Newspapers Ltd., a division of Star Media Group, a subsidiary of Torstar Corporation.

The Toronto Star hosts a wide food subsection under the "**Living Section**"

Media Catalyst: The Windsor Star

E-mail: letters@thestar.canwest.com

The Windsor Star is the regional newspaper of Windsor, Ontario and is owned by CanWest Global Communications. It has the highest readership per capita in its circulation range of any Canadian metropolitan newspaper.

The Windsor Star also hosts a food subsection in the **Life Section**

Media Catalyst: The Dominion

E-mail: letters@thestar.canwest.com

The Dominion is a monthly Canadian Newspaper, formed by a group of independent journalists in April 2003 and published by the Dominion Newspaper Society, a non-profit organization.

The Dominion also has a food section.

Current Affairs Media: MACLEANS

MacLean's Magazine, One Mount Pleasant Road, 11th floor, Toronto, ON, M4Y 2Y5, Canada, Tel: 1-800-268-9119, E-mail: letters@macleans.ca

MacLean's is Canada's only national weekly current affairs magazine, focusing on of international affairs, social issues, national politics, business and culture. MacLean's has a readership of 2.8 million readers.

Current Affairs Media: L'actualité

L'actualité is a French-language news and general interest magazine in Quebec, Canada, published by Les Éditions Rogers. The magazine has over a million readers, according to Canada's Print Measurement Bureau, from its circulation which is mainly Québécois subscribers.

TV Show: Restaurant Makeover

Website contact form

Restaurant Makeover is a television series which is broadcasted by Food Network Canada and HGTV Canada, and airs in over 16 countries worldwide. It is hosted by chefs Brad Long, Rene Chauvin, Lynn Crawford, Massimo Capra, Corbin Tomaszeski, David Adjey, and Susur Lee along with designers Robin De Groot Meredith Heron, Cherie Nicole Stinson, Jessica Cotton, Glen Peloso, Brenda Bent, and Jonathan Furlong, who perform renovation makeovers on restaurants in need of a transformation.

TV Show: Made to Order

Website contact form

Made to Order hosted by Guy Rubino and his brother, is a TV show about high-end restaurant business. Michael Rubino is responsible for organizing the front of the house and Guy for managing the food and kitchen.

TV Show: The Main

Website contact form

The Main is a half-hour show where in each episode Chef Anthony Sedlak prepares a dish featuring one main ingredient.

TV Show: Good Eats

Website contact form

Good Eats, hosted by Alton Brown is a comical program about different foods.

TV Show: Ramsay's Kitchen Nightmares

Website contact form

Gordon Ramsay is the best British Chef with twelve Michelin stars. In North America he is known as the host of two TV shows "Hell's Kitchen" and of "Kitchen's Nightmares". Kitchen Nightmares is a popular TV-show broadcasted by Food Network Canada and is about transformations of some of the worst restaurants around the world.

TV Show: The Heat with Mark McEwan

E-mail: media@fineliving.com

THE HEAT With Mark McEwan is a TV show about celebrity chef Mark McEwan and his cooking experiences including catering to the rich and famous and running the best restaurants.

TV Show: 30 Minute Meals

Website contact form

30 Minute Meals show hosted by Rachel Ray focus on low-budget and easy to cook meals.

TV Show: Barefoot Contessa

Website contact form

Barefoot Contessa is a popular TV Show based on The Barefoot Contessa Cookbooks.

Events & Trade Fairs

Event: Savour Food & Wine Show

1161 Hollis Street, Suite, (2nd Floor Via Rail Station) Halifax, NS B3H 2P6, Tel: 902 429 5343 , RANS Office Fax: 902.429.0659, E-mail: chrystal@rans.ca

Savour food & Wine Festival includes the exhibition of new cooking techniques, and tasting of renowned wines.

Event: Good Food Festival & Market

447 Speers Speers Road, Suite #4 Oakville, Ontario L6LK 3S7, Tel: 905-842-6591, fax: 905-842-6843 E-mail: info@goodfoodfestival.com

Good Food Festival & Market offer free cooking lessons, food talks, demonstrations and drink samples

Event: Bon appetite Ottawa

94 Glenview Avenue, Ottawa, ON, K1S 1M3, Tel: 613-231-5651, E-mail: bonappetitottawa@sympatico.ca

Bon Appetit Ottawa is a food and wine show with more that 90 restaurants, caterers, wineries and breweries.

Event: Salute Wine & Food Festival

E-mail: info@salutewinefestival.com

Salute Wine & Food Festival hosts 50 international and wineries and winemakers, wine tastings and culinary exhibitions by famous chefs.

Event: EAT! Vancouver

901 Station Street Vancouver, BC, V6A 4J8, e-mail: info@eat-vancouver.com

EAT! Vancouver is a consumer food, beverage and cooking festival taking place at BC Place

Stadium, Vancouver, BC on May 22, 23 and 24, 2009. The food show features food, beverage and kitchen goods exhibitors along with wineries, breweries, restaurants, cooking demonstrations, wine and cheese seminars, cookbook authors, chef competitions and barbecue and chilli cook-offs.

Event: PEI World Wine Festival

Tel: 902-368-5715, E-mail: fjmacdonald@gov.pe.ca

The P.E.I. Liquor Control Commission hosts an annual wine festival where suppliers showcase their products to wine enthusiasts.

Event: The Rocky Mountain Wine & Food Festival

Tel: 403-228-0777, Fax: 403-398-1334, E-mail: leah@rockymountainwine.com

The Rocky Mountain Wine & Food Festival is one of the largest wine and food events in Alberta. The Festival offers wine tasting and food samples from local restaurants and hotels.

Event: Gourmet Food & Wine Expo

E-mail: jennifer@townmedia.cab

The annual Gourmet Food & Wine Expo which is held every November offers sampling of more than 1,200 wines, spirits and beers from around the globe.

Event: World Wine & Food Expo

344 Main Street, Suite E Shediac, New Brunswick, Canada, E4P 2E8, Tel: 506-532-5333 or 866-846-9463, Fax: 506-532-4432, E-mail: info@wineexpo.ca

The 18th annual World Wine & Food takes place every November. The event exhibits more than 350 wines while it offers food & wine seminars and wine tastings.

Trade Fair: Canadian Food& Beverage Show

316 Bloor Street West, Toronto, Ontario, M5S 1W5, Tel: 416.923.8416, e-mail: info@crfa.ca

The Canadian Food & Beverage Show along with HostEx are two of the most important industry's events which the Canadian Restaurant and Foodservices Association united in order to combine foodservice and hospitality industries.

Trade Fair: Sial-The North American Food Marketplace

SIAL Montréal, 300, rue Léo-Pariseau, suite 1100, P.O. Box 159, Place du Parc, Montréal, Québec, H2X 4A4, Tel: +1 514 289 9669, Fax: +1 514 289 1034, e-mail: info@sialmontreal.ca, E-mail: xavier.poncin@comexposium.com

The North American Food Marketplace is an international food tradeshow with exhibitors from around the world

Blogs

Gastronomy Blog: Omnivore's Ottawa

Omnivore's Ottawa is a popular blog about food by Ron Eade, Food Editor at the Ottawa Citizen. It hosts restaurant reviews, recipes and provides links for the food sector.

Gastronomy Blog: The National Nosh

The National Nosh is a popular blog by Amy, a Toronto-based food and travel writer who has also authored two cookbooks. She also writes and illustrates the weekly "Dish" column in the National Post, is a contributing editor for enRoute magazine, and is a regular contributor to MacLean's, Chatelaine and Food & Wine among other magazines.

Restaurants & Bars : Montréal

Restaurant: Toque!

900, Place Jean-Paul-Riopelle, Montréal (Québec) H2Z 2B2, Tel: 514 499-2084 Facsimile (514) 499-0292, E-mail info@restaurant-toque.com

Toqué! established in 1993 is the only restaurant member of the International Relais & Châteaux chain in the Montreal region. It is owned by Christine Lamarche and chef Normand Laprise, who collaborate with local suppliers only.

Bar: Altitude 737

1 Place Ville-Marie, Tel: +1 514 397 0737.

Altitude 737 is a business meeting point and post work place for lawyers and bankers. Altitude 737 has a stylish lounge bar, nightclub and two terraces.

Restaurants & Bars : Toronto

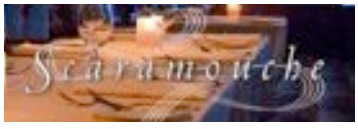
Restaurant: North 44

2537 Yonge St., Toronto, ON M4P 2H9, Tel; 416-487-4897, fax: 416-487-21-79, E-mail: north44restaurant@rogers.com

North 44 is a celebrity restaurant, voted the Zagat Survey's Most Popular restaurant in the T.O section. Gourmet Magazine rated it first restaurant in Toronto, while Wine Spectator has awarded it the Award of Excellence for six consecutive years.

Restaurant: Scaramouche

Tel: 416 961 8011



Scaramouche, created in 1981 has been twice voted as "Toronto's Top Restaurant magazine while Zagat Survey award it the

2006 Top Service Award. It has also received the Award of Excellence by Wine Spectator for three consecutive years and positive reviews by The Toronto Star and the Toronto Life.

Restaurant: Mistura

265 Davenport Rd, Toronto, Ontario, M5R 1J9, Tel: 416 515 0009, Fax: 416 515 7931, E-mail: info@mistura.ca

Renowned restaurant Mistura is co-owned by its also famous chef Massimo Capra. Essentially it is included as one of Toronto's Top Restaurant by Mobil Guide and Zagat Survey and it is well appreciated for its modern Italian cuisine.

Restaurant: Jamie Kennedy Wine Bar

9 Church Street, Toronto M5E 1M2, Tel: 416 362 1957 ext 102, E-mail: laurac@jamiekennedy.ca

Jamie Kennedy Wine Bar is considered to be on of the best Restaurants in Ontario as it has Chef Dan DeMatteis and renowned sommelier Jamie Drummond as its leading stuff.

Restaurant: Canoe

54th Floor, Toronto Dominion Bank Town, 66 Wellington Street West, Toronto, ON Canada, M5K 1H6, Tel: 416 364 0054, Fax: 416 364 4273, E-mail: canoe@oliverbonacini.com

Canoe owned by Oliver & Bonacini is one of the most famous restaurants in Canada. Critically acclaimed by New York Times Canoe has as its chef Antony Walsh.

Bar: Roof Lounge

4 Avenue Rd, Toronto, On, M5R2E8, Tel: 416 925 1234, Fax: 416 947 6693

Roof Lounge, Toronto's only roof top bar is considered by Business Magazine as one of the world's top ten hotel bars.

Bar: Sky Yard

1150 Queen Street W., Toronto M6J 1J3, Tel: 416.531.5042, E-mail: info@thedrakehotel.ca

The Drake Hotel's rooftop bar is one of the best cocktail bars. Recently opened (2007) Sky Yard it also projects art house films.

Restaurants & Bars : Vancouver

Restaurant: Bishops

2183 West 4th Avenue Vancouver BC V6K 1N7, Tel: 604 738 2025, Fax: F 604 738 4622, E-mail: inquire@bishopsonline.com

Fine Dining Restaurant is one of the most acclaimed restaurants in Vancouver. Included in Mobil Guide, Bishops has as its Executive chef Andrea Carlson.

Restaurant: Lumière

Lumière Restaurant Relais Gourmand, 2551 West Broadway Vancouver, BC V6K 2E9, tel: 604.739.8185, fax: 604.739.8139, E-mail: info@lumiere.ca

Lumière Restaurant which recently added Chef Dale MacKay, of the Gordon Ramsay Restaurants, is considered as one of the best Canadian Restaurants. It became the first freestanding restaurant in Canada to receive the 2000 Relais Gourmand designation, Along with the recently renovated Lumière Tasting Bar, which opened in 2003, Lumière was voted Best Restaurant and Best French restaurant by Vancouver Magazine for seven years and has received tributes from many distinguished

food critics. The restaurant maintained the AAA Five Diamond Award for 2007 and the Lumière Tasting Bar received Vancouver Magazine's prestigious award for Best Small Plates.

Restaurant: Bacchus Restaurant & Piano Lounge

845 Hornby Street Vancouver, British Columbia Canada V6Z1V1, Tel: 604-689-7777, Fax: 604-608-5348, E-mail: ejackson@wedgewoodhotel.com.com

Bacchus Restaurant & Lounge

Bacchus Restaurant & Lounge is one best hotel restaurants in Canada as it received the 2008 Four Diamond Award from the CAA/AAA. Its Executive Chef is Lee Parsons who is famous for its modern French cuisine.

Bar: Gerard Lounge

845 Burrard Street, Vancouver, Canada, V6Z 2K6, Tel: 604.682.5511, fax 604.682.5513, e-mail: info_vancouver@suttonplace.com

GERARD

Gerard Lounge has been awarded "Bronze" for Best Bar/Lounge at the Vancouver Magazine Restaurant Awards in 2005 and in 1999 International Martini Challenge named Gerard Lounge for Vancouver's "Best Classic Martini" and "Best Martini Food".

Bar: Lola's

432 Richards Street, Vancouver, Tel: +1-604-684-LOLA

Lola's at Century House

Situated at Century's house, Lola's has one of the most extensive wine list along with the renowned champagne cocktail and martini list. It has received many awards including the Critics Choice Silver Medal "Best Pacific Northwest" 1997.

Restaurants & Bars : Québec

Restaurant: Initiale

54 rue Saint-Pierre Québec Canada G1K 4A1, Tel: (418) 694-1818, Fax: (418) 694-2387, E-mail: info@restaurantinitiale.com

Initiale is a 40-seat only restaurant but is considered to be one of the best restaurants in Quebec with Chef LeBrun in its kitchen. It is included in the renowned Relais & Château chain and Mobil Guide.

Influential Personalities

Chef: Jamie Kennedy

Jamie Kennedy Kitchens, 4 Gilead Place, Toronto, M5A 3C9, E-mail: jodi@jamiekennedy.ca

Jamie Kennedy is a well-known Canadian chef. He has established Jamie Kennedy Kitchens based in the City of Toronto, Ontario. Jamie Kennedy Kitchens includes Kennedy's Wine Bar, which is famous for its extensive wine list and the Jamie Kennedy Gardiner at the Gardiner Museum of Ceramic Art.

Chef: Susur Lee

603 King Street West, Toronto, Ontario Canada, M5V 1M5, Tel: 416.603.2205, E-mail: postmaster@susur.com

Susur Lee is a renowned chef based in Toronto, Ontario, Canada. He currently owns two fusion cuisine restaurants in Toronto, Madeline's (former Susur), and Lee. Susur has received various awards including *Restaurant*'s World's 50 Best Restaurants Awards. Susur has also appeared on Food Network's Iron Chef America and East meet West Show.

Chef: Rober Feenie

Tel: 604 692-4228, Tel: 604 340-5025, E-mail: meaghan.benmore@hillandknowlton.ca

Robert Feenie a famous chef and chef consultant, has graduated from Dubrulle Culinary Institute. He often represents Canada as an Ambassador for Canadian and British Columbia food products and wines. He has been awarded the Relais Gourmand designation, four stars from the Mobil Travel

Guide and the AAA Diamond Award. He has also published three cookbooks, starred in New Classics with Rob Feenie on Food Network Canada, and participated in Iron Chef America. He currently is a Food Concept Architect for casual fine-dining establishment Cactus Club Café.

Chef: Massimo Capra

265 Davenport Road, Toronto, Ontario, M5R 1J9, Tel: 416-515-0009, E-mail:info@mistura.ca

Massimo Capra is a celebrity chef and restaurant consultant based in Toronto Canada. He has appeared on City Line and Food Network's show Restaurant Makeover. After working for Archer's Restaurant in Toronto and Preggo Della Piazza, Capra became co-owner and executive chef in Mistura. Capra has written the cook book One-Pot Italian Cooking and has a monthly column in the Globe and Mail's "New Life" section.

Chef: Anthony Walsh

Website Contact Form

Anthony Walsh, executive chef of the critically acclaimed restaurant Canoe restaurant and bar, was the first chef to ever represent Canada at the World Food Summit in Singapore, was awarded the Ontario Hostelry Institute Culinary Gold Award in 2004 and captured the Olympic Gold Metal Plates for Ontario in 2005.

TV Chef: David Adjey

Tel: 416-802-5292, E-mail: info@chefnetworkinc.com

davidadjey | cuisine

David Adjey is a renowned TV Chef from Toronto, Canada. He is known for his appearances on the Food Network Canada Show Restaurant Makeover. He has received his training in Melrose and Rose Café, under the auspices of Richard Crause and with chef and cookbook author Guiliano Bugialli in Florence, Italy. His first appearance on TV was on Jay Leno's 'The Tonight Show'. Afterwards David Adjey appeared on the Food Network's Ready, Set, Cook and Iron Chef. Frommer's guide has appraised him as the "Best New Chef in California".

TV Chef: Guy Rubino

19 Mercer Road, Toronto, Ontario, 416599RAIN, E-mail: rain@rainrestaurant.ca

Guy Rubino

Guy Rubino is the executive chef and co-owner of Rain, a fine dining restaurant in Toronto. He also hosts the Food Network Canada show Made to Order. In 1987 he opened his first restaurant Gourmet Greens, and spent the following 8 years working at several restaurants in the USA. In 2004, he opened the modern Italian restaurant Luce, which closed in 2006.

TV Chef: Anthony L. Sedlak

E-mail: ellenheronhowell@mac.com, E-mail: anthony_sedlak@hotmail.com

Anthony Sedlak

Anthony L. Sedlak is a Canadian Chef and the host of Food Network Canada's The Main. He has completed the Culinary Art Program at Carson Graham Secondary School in North Vancouver and the four-year apprenticeship program at Vancouver Community College. Sedlak was selected as Canada's representative for the 2006 Hans Bueschken World Junior Chef Challenge in Auckland, winning the second place honours. After winning FoodTV's Superstar Chef Challenge II, Sedlak left his job as sous-chef at The Observatory to shoot The Main.

TV Chef: Ted Reader

Website Contact Form

TED READER'S WORLD FAMOUS BBQ

Ted Reader is a Canadian chef and host of the television show King of the Q, a show devoted entirely to barbecue. He also makes regular guest appearances on CTV's Canada AM, Toronto's AM 640, and Q-107. After graduating from George Brown College's culinary management program he became executive chef at the Skydome Hotel in Toronto. For nine years he was the featured grill chef on the series Cottage Country and a team chef with Cart Racing for three seasons. He is the author of several cookbooks including Sticks and Stones: The Art of Grilling on Plank, Vine and Stone, which was awarded the Silver Medal in the Cuisine Canada 2000 Cookbook Awards. His most recent grilling cookbooks, Sticky Fingers & Tenderloins and Hot, Sticky and On Fire, are both Canadian best sellers.

TV Chef: Sam Zien

E-mail: info@thecookingguy.com

Sam Zien, is a Canadian television chef. His show, Just Cook This!, started on local television stations before moving to a Fox affiliate and then to Discovery Health.

TV Chef: Christine Cushing

Website contact form

Christine Cushing is a Canadian celebrity chef and a regular guest chat show" Off the Record "on TSN while she is in development for a new show. She has been host of the television programmes Christine Cushing Live, and Cook With Me on Food Network Canada and Dish It Out on Life Network. A graduate of the Food and Beverage Management program at George Brown College in Toronto, Christine Cushing has worked in Toronto's The Four Seasons Hotel, King Ranch Health Spa and Scaramouche Restaurant. Her cookbook career includes two cookbooks, the well known Fearless in the Kitchen and Dish it Out. Finally she has introduced a line of upscale food products, "Pure by Christine Cushing". She was the spokesperson for Cook for the Cure Breast Cancer campaign and a superhero for the Starbright foundation for Sick Kids hospital.

TV Chef: Brad Long

Website Contact Form

Brad Long is a Canadian chef who is known for his appearances on the Food Network show Restaurant Makeover. He owns and runs the famous restaurant Veritas. He has worked at Maple Leaf Sports & Entertainment. The Platinum Club won consecutive Wine Spectator Awards of Excellence every year since 2002; a VQA Restaurant Awards of Excellence; and the International Award of Excellence - Diamond Wine Award in 2004. Meanwhile, the Air Canada Club was ranked by Globe and Mail reviewer Joanne Kates as one of the Top 10 restaurants of the year in its inaugural season.

TV Chef: Mark McEwan

E-mail: north44restaurant@rogers.com

Mark McEwan is a Canadian Celebrity chef. He is currently the host of Fine Living Network's The Heat with Mark McEwan, and is a judge on Superstar Chef Challenge. McEwan owns several restaurants including North 44, renowned Bymark Restaurant and ONE`, at The Hazelton Hotel, Toronto's only 5-star hotel

Gastronomy Expert: Jacob Richler

Website contact form

Jacob Richler

Jacob Richler is a Canadian newspaper and magazine journalist. Richler was a long-time restaurant reviewer for the National Post and he has also collaborated with Chef Susur Lee on the book Susur: A Culinary Life. He has also been a columnist for Saturday Night, Financial Post Magazine and Toronto Life, as well as a contributor to GQ, Canadian Living, Fashion, Flare and enRoute.

Gastronomy Expert: James Chatto

E-mail: editorial@torontolife.com

James Chatto started writing about food, wine and restaurants for Toronto Life in 1987, where he still reviews restaurants and writes a monthly dining column for the magazine. He was food editor of Toronto Life Gardens (1996-97) and of Gardening Life (1997-2002), Enroute magazine's wine columnist for four years, and he writes regular wine and spirits columns for the LCBO's Food & Drink magazine, where he is creative consultant and Senior Editor. He is the author of three books about food, co-author of two more and has contributed to seven other cookbooks: The Canadian Living Entertaining Cookbook (1990), The Eating Well Cookbook (USA, 1991), The Canadian Cooking Collection (1991), Country Cooking (1991), Canadian Living Desserts (1992), Canadian Living's Best (1994) and Canadian Living's Family Cookbook (1995). In 1990 he received a White award for Critical Writing on Food and Dining (USA). In 1991, he won a Tourism Industry Association Canada award and in 1993 a Pride award (USA) for his travel writing. He was awarded the Ontario Hostelry Institute's Gold Award in 1994 and won a City & Regional Magazine Gold Award (USA/Canada) in 1995. In 2007, James was made a

Chevalier of the Confrérie des Chevaliers du Taste Fromage de France. He is also National Culinary Advisor for Canada's Olympic and Paralympic athlete fundraising initiative, Gold Medal Plates, and co-founder of the Canadian Culinary Championship.

Gastronomy Expert: Anita Stewart

E-mail: astewart@uoguelph.ca

Anita Stewart is the first Canadian to earn a Master of Arts in Gastronomy from The University of Adelaide in South Australia & Le Cordon Bleu(Paris), and the first culinary journalist to be given a lifetime membership as a Professional Agrologist by the Ontario Institute of Agrologists. She has published 14 cookbooks, her most recent is Anita Stewart's CANADA ~ The Food, The Recipes, The Stories and has been awarded The Toronto Star's Golden Whisk Award for one of the Top Ten recipes of 2006.

Gastronomy Expert: Lucy Waverman

E-mail: lucy@lucywaverman.com

Lucy a famous culinary personality from Canada, appears on television and radio shows across Canada and the United States including 12 years with CityTV's CityLine. She writes a renowned Saturday food column "Weekend Menu," in The Globe and Mail whereas she is the author of eight cookbooks, including the award-winning Home for Dinner. She is also the recipient of Cuisine Canada's 2005 gold medal award for cookbooks for A Matter of Taste, which she co-wrote with James Chatto. Her latest book Lucy's Kitchen also won the silver medal at Cuisine Canada's 2007 Canadian Culinary Book Awards in the Cookbooks category. She is the food editor at Food & Drink, a magazine published by the Liquor Control Board of Ontario and contributed to the new Toronto Insight Guide writing about the Toronto.

Wine Expert: David Lawrason

E-mail: david@davidlawrason.com

David is an independent, wine writer, educator and wine competition judge since 1986. He is currently wine columnist for Toronto Life, an instructor for the Canadian Association of Professional Sommeliers at George Brown College, a reviewer for **Winery to Home** and chief judge for the Canadian Wine Awards.

Greece

Restaurants & Bars: Αθήνα

Restaurant: Σπονδή

5 Pirronos, Plateia Varnava, Pagrati, Athens, Tel: 0030 210 756 40 21, Email: info@spondi.gr

The restaurant has been honoured with two Michelin stars as well as has been awarded with a prize from Athinorama for its wine list which includes many labels from all over the world.

Restaurant: Etrusco

Hotel Athenian,32 Kalirois, Neos Kosmos, Athens, Tel: 00 30 210 921 5353

Etrusco chef Mr. Botrini has been awarded from Athinorama as one of the best chefs in Greece for 2008. The restaurant, which is located in Corfu, is characterized by the creativity of its chef and the unique tastes that offer to its guests.

Restaurant: Πιλ-Πουλ et Jerome Serres

51 Apostolou Pavlou Hotel Athenian, Kalirois 32, Neos Kosmos, Athens, Tel: 00 30 210 921 5353

The restaurant has been awarded with one Michelin star for the second year in a row. The cuisine is French but also presents some Mediterranean options.

Restaurant: Βαρούλκο

80 Pireos St., Tel: 0030 2105228400**,** e-mail: info@varoulko.gr

Βαρούλκο has been awarded from Athinorama for the 15th time while the restaurant gained also one Michelin star confirming its originality in providing gourmet tastes.

Restaurant: Central

Pl. Kolonakiou 14, Kolonaki, Athens, Tel: 0030 210 724-5938

Central restaurant bar is among the hot spots in the area of Kolonaki, attracting businessmen, politicians, celebrities and is considered to be a trend setter in the Athenian night life.

Restaurant: Frame

2 Kleomenous St., 106 75, Athens, Greece, Tel: 210 7290711-19

A new restaurant bar in the premises of Saint George Lycabettus hotel in Kolonaki is an upcoming hot spot of celebrities, businessmen and actors. The restaurant under the Michelin awarded chef Ektora Botrini aims at providing elegant choices for food and wine making reality the motto "lifestyle evolution".

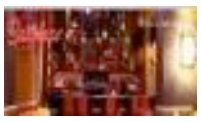
Bar: Galaxy Bar-Hilton Hotel

46 Vassilisis Sofias Avenue , Athens 11528, Tel: +30 210 7281000, Fax: +30 210 7281111, Email: sales.athens@hilton.com

Galaxy Bar is a chic and stylish bar with Oriental finger food and Ethnic music.

Bar: Balthazar

27, Tsoha St, Athens, Tel: 00 30-210-6441215



Balthazar is a bar-restaurant which is situated in a neoclassical courtyard. Balthazar mainly attracts members of the art and media.

Bar: Baraonda

43 Tsochas street, Athens, Tel: +30 210. 6444308, +30 210. 6441778

Baraonda is a renowned bar-restaurant owned by Stathokostopoulos' family. It usually hosts personalities of business, politics and social life.

Bar: Alexander's Bar- Hotel Grande Bretagne

Constitution Square, Athens, 10564, Tel: 00 30 210 333 0787

Alexander's Bar has an extensive list of liquor and it has been voted by Forbes magazine as the Best Hotel Bar in the world by Forbes magazine.

Bar: T Palace Lounge Bar - King George Hotel

Constitution Sq., 3, Vasileos Georgiou A' Str. GR 105 64, Athens, Tel: +30 2810 300330, +30 2810 220088, +30 2810 382730

The new **T Palace in the King George Hotel** in Syntagma is a Lounge Bar, decorated by interior designer Antonis Kalogridis.

Bar: Olive Garden - Titania Hotel

Panepistimiou Street 52, 11742, Athens, Tel: 00 30 210 3326000, Fax: 00 30 210 3300700

Titania Hotel's rooftop Olive Garden is a Mediterranean *haute* cuisine restaurant. Olive Garden has won awards both for its appearance and its gourmet cuisine by the City of Athens as well as other organizations. It is also famous for its exclusive international wine list.

Bar: Ratka

30-32, Charitos, Athens, Greece , Tel: 00 302107290746

Ratka is a classic bar-restaurant hosted by the Ratka. It is a hangout for Greek socialites, actors, media moguls, and intellectuals.

Nixon

61B Agisilaou St, Tel: 0030 210 34 62077, E-mail: nixonbar@otenet.gr

Nixon is a "film noir" bar restaurant with minimal decoration and selective cuisine.

Ithaki

Ithaki 28 Apollonos street, Lemos Vouliagmenis, Athens, Tel: +30 210 8963747, +30 210 8963739, E-mail: ithaki@enternet.gr

Ithaki is a restaurant bar situated in the Peninsula of Vouliagmeni with for more than two decades. Ithaki has been host to luminaries of the international jet set from Athina Onassis to Bill Clinton, from Sean Connery to Julio Iglesias and Leonardo DiCaprio.

Restaurants & Bars: Θεσσαλονίκη

Restaurant: Alfredo's

Hyatt Regency Thessaloniki, 13 km. Ethnikis Odou Thessalonikis-Piraias, Tel: 2310-491234

The restaurant located in Thesaloniki has been awarded by Athinorama as among the best restaurants for 2008. The chef presents gourmet tastes from French and Mediterranean cuisine.

Media

Wine Media: Οινοχοός

Ano Poli, Thessaloniki, Tel: 30 2310 206863

Οινοχοός is a supplement of daily newspaper Kathimerini, which is among the top dailies in circulation in the country. The supplement provides news from the Greece and international market, as well as lifestyle news.

Wine Media: Το Αμπελοτόπι

Ioannou Vinetum EPE, 41 Leoforos Karea, 162 33, Kareas Virona, Tel: 00 30 210 766 0560, Fax: (0030) 210 766 0680, email: info@vinetum.gr

Το Αμπελοτόπι is a monthly trade publication providing news from the Greek and international wine industry, specialised oenology articles, as well as opinion articles from experts of the industry.

Wine Media: WinePlus

5 Kariotaki, 546 45, Thessaloniki, Tel: 2310 88831, Fax: 2310 888312, E-mail: info@wineplus.gr

Wine plus is a specialized wine magazine that is published every two months and is distributed free at selected points in Athens and Thesaloniki (restaurants, wine shops, hotels etc). The magazine presents wines and spirits as well as provides critiques and proposes trips based on gourmet tasting.

Gastronomy Media: Olive

info@eliasmamalakis.gr

The Greek version of the international magazine Olive launched in March 2007. The magazine is published from BBC and is in co operation with the best chefs in London. The magazine provides articles about food and wine.

Gastronomy Media: Γαστρονόμος

2 Ethnarchou Makariou kai D. Falireos, Faliro 185 47, Tel: 00 30 210 4808000, Fax : 210 4808055, E-mail: webmaster@kathimerini.gr

Γαστρονόμος is another supplement magazine of the national daily Kathimerini. It is included in the Sunday publication and provides news and articles regarding gourmet food and wine.

Gastronomy Media: ΒΗΜΑ Gourmet

80 Michalakopoulou Str. Athens, 115 28, Tel: 211 365 7000, Fax: 211-365.8004, E-mail: tovima@dolnet.gr

One more supplement magazine about food and wine included in the national daily TO BHMA once per month. The supplement is considered to be the leader in its category with approximately 575.000 readers every month in 2007.

Gastronomy Media: Gourmet – Κυριακάτικη Ελευθεροτυπία

E-mail: ke@enet.gr

This magazine is a special monthly publication of the supplement magazine ΕΨΙΛΟΝ that is included in the Sunday publication of the national daily Ελευθεροτυπία. The publication is among the top gourmet supplement publications in terms of readership. The magazine provides recipes from Greece and around the world, as well as presentation and critique of wines and wineries.

Gastronomy Media: Gourmed

Tel: 210 2826700, Fax: 210 2830123, E-mail: info@gourmed.gr

GOURMED
Taste the Med

Gourmed is an online portal about gourmet food and wines. The portal provides recopies from Greece and abroad, presents wines and restaurants as well as books and travel propositions related to food and wine.

Lifestyle Media: Ευζήν

Ioannou Metaxa 80, Karelas 19400, Koropi, Tel: +30 210 668 80 00, E-mail: info@liberis.gr

Ευζήν is a monthly lifestyle magazine of the Liberis publications focusing on gourmet food, travel and wine. Ευζήν provides extensive wine ratings, while the magazine's main target group is men between ages 25 – 44 who are interested in lifestyle.

Life Style Media: Life & Style

Monthly lifestyle magazine of the Liberis publication that focuses on clothes, travel, cars, food and wine, and issues related to lifestyle. The magazine targets men and women of 30 – 45, middle and high income who are interested in lifestyle.

TV Show: Hungry Bear-Nistiko Arkoudi

info@nistikoarkoudi.gr

Hungry Bear. The show brings Greek recipes and world-famous traditional Greek dishes. Hungry Bear first appeared on a weekly basis on ET3. Nowadays it is being broadcasted by NET along with the TV Show "We live in Greece".

TV Show: Mama's Kitchen

128 Tsimiski, 54621, Thessaloniki, tel: 2310 254 700-9, Fax: 2310 263013, E-mail: info@mamakouzina.tv

The host of **Mamas Kitchen** is Eftychis Bletsas who has already published his first cookbook. The television show is hosted in various towns and villages all over Greece, showcasing home cooking by Greek moms.

TV Show: What is the neighbour cooking -Ti Mageireui o geitonas

Website Contact Form

It is an everyday morning cooking show which broadcasts the history of each region, dietary habits, easy ways and combinations.

Influential Personalities

Wine Expert: Konstantinos Lazarakis MW

Konstantinos Lazarakis is the first and only Master of Wine in Greece and Eastern Europe. He presents extensive bibliography and writes for many publications in specialized and lifestyle magazines. Additionally he participates as the main speaker in many conferences about wine.

Wine Expert: Floudas Georgios

Idomeneos Str., Prasa - New Alikarnassos, Interdynamic Building, 71500, Heraklion, Crete, Greece, P.O.BOX 1468, Zip Code 71110, Tel: +30 2810 300330, +30 2810 220088, +30 2810 382750

Floudas Georgios is the Wine Director at Elounda beach in Crete

Wine Expert: Xrisa Giatra

46 Vassilissis Sofias Avenue, Athens, Greece 11528, Tel: 30-210-7281000 Fax: 30-210-7281111

Xrisa Giatra is the head sommelier at Hilton Hotel. She has studied oenology and technology of drinks and post graduate studies as a sommelier in the educational team of Le Monde. Her previous working experience includes the restaurants "Ορίζοντες Λυκαβηττού" , "Καστελόριζο", "Porto Elounda & Peninsula" and "Elounda Mare Relais & Chateaux", as well as "Σπονδή" .

Wine Expert: Maria Katsouli

Constitution Sq., 3, Vasileos Georgiou A' Str. GR 105 64, Athens, Tel: +30 2810 300330, +30 2810 220088, +30 2810 382730

Maria Katsouli is sommelier at the Tudor Hall of the Kind George hotel and vice president of the Greek oenologist association. She presents extensive

publicity in a wide range of publications writing currently for Οινοχοός , while is promote the more active role of women in wine tasting.

Wine Expert: Ziakos Elvis

5 Pirronos, Plateia Varnava, Pagrati, Athens, Tel: 0030 210 756 40 21, E-mail: info@spondi.gr

Ziakos Elvis has been awarded for the second time as the best sommelier in Greece for 2008. He been awarded the same title in 2006, while currently he is the sommelier of the restaurant "Σπονδή". He presents extensive publicity in a wide range of publications as well as participation in wide range of events related to food and wine.

Wine Expert: Nikos Manesis

Nikos Manesis, writer and publisher, has an extensive experience about the wine industry and is considered as the ambassador of the Greek wine in the international market. He has worked in the major wineries areas of the world, including France, California, NY and Switzerland. In the early 90´s he published the Greek Wine Guide which was so successful that has been republished in 1994, 1995, and 1996, additionally he has published The Illustrated Greek Wine Book that presented another innovation, the introduction of wine photos the surrounding locations of wineries.

Wine Editor: Dimitris Antonopoulos

2-4 Mesogeion Str., Athens 11527, Tel: 0030 210 7450100, 0030 2107450100, 210 7450200, FAX: 210-7450211,

Dimitris Antonopoulos is a journalist writing about gourmet food and wines at Athinorama, Status and EYZIN magazine.

Wine Editor: Simos Georgopoulos

E-mail: ke@enet.gr

Simos Georgopoulos is a journalist writing about gourmet food and wines at Gourmet supplement of Sunday Eleftherotypia, Status and EYZIN magazine.

Wine Editor: Panos Deligiannis

2-4 Mesogeion Str., Athens 11527, Tel: 0030 210 7450100, 0030 2107450100, 210 7450200, FAX: 210-7450211,

Panos Deligiannis is a journalist writing about gourmet food and wines at Athinorama, Status and Alpha Guide.

Wine Editor: Argiris Kalianiotis

41 Leoforos Karea, 162 33 Kareas Virona, Tel: 0030 210 766 0560, Fax: (0030) 210 766 0680, E-mail: info@vinetum.gr

Argiris Kallianiotis is a journalist writing about wine at the wine magazine To Αμπελοτόπι.

Wine Editor: Dionisios Koukis

Ano Poli, Thessaloniki, Tel: 30 2310 206863

Dimitrios Koukis is a journalist writing about gourmet food and wines at Athinorama, EYZIN and Οινοχοός.

Wine Editor: Katerina Legaki

Tel: +30 210-2826700, Fax: +30 210-2830123, E-mail: ask@gourmed.gr

Katerina Legaki is a journalist writing at the portal Gourmed.gr.

Wine Editor: Niki Mitarea

41 Leoforos Karea, 162 33 Kareas Virona, Tel: 0030 210 766 0560, Fax: (0030) 210 766 0680, E-mail: info@vinetum.gr

Nini Mitarea is a journalist writing at the national daily Ethnos, Nautemporiki and wine publication To Αμπελοτόπι.

Wine Editor: Giannis Mpamiatzis

41 Leoforos Karea, 162 33 Kareas Virona, Tel: 0030 210 766 0560, Fax: (0030) 210 766 0680, E-mail: info@vinetum.gr

Giannis Mpamiatzis is a journalist writing at the wine publication To Αμπελοτόπι.

Wine Editor: Maria Netsika

5 Kariotaki, 546 45, Thessaloniki, Tel: 2310 88831, Fax: 2310 888312, E-mail: info@wineplus.gr

Maria Netsika is a journalist writing at the wine publication WINE PLUS.

Wine Editor: Meropi Papadopoulou

Ano Poli, Thessaloniki, Tel: 30 2310 206863

Meropi Papadopoulou is a journalist writing at the wine publication ΟΙΝΟΧΟΟΣ as well as at daily newspaper Kathimerini and the lifestyle magazine ΕΥΖΙΝ.

Wine Editor: Ntinos Stergidis

41 Leoforos Karea, 162 33 Kareas Virona, Tel: 0030 210 766 0560, Fax: (0030) 210 766 0680, E-mail: info@vinetum.gr

Ntinos Stergidis is a journalist writing at the wine publication Το Αμπελοτόπι.

Wine Editor: Eleni Sotiriou

5 Kariotaki, 546 45, Thessaloniki, Tel: 2310 88831, Fax: 2310 888312, E-mail: info@wineplus.gr

Eleni Sotiriou is a journalist writing at the wine publication WINE PLUS.

Wine Editor: Argiris Tskiris

2-4 Mesogeion Str., Athens 11527, Tel: 0030 210 7450100, 0030 2107450100, 210 7450200, FAX: 210-7450211,

Argiris Tsakiris is a journalist writing at Athinorama and lifestyle magazine ΕΥΖΗΝ.

Gastronomy Celebrity: Elias Mamalakis

E-mal: info@eliasmamalakis.gr

Elias Mamalakis is an author of many books and writes in a wide range of publications regarding food recipes, while he is also TV presenter of the most popular show

regarding cooking in Greece. Mr. Mamalakis has a great appeal in audience and he is responsible for the making wide known recipes from all parts of Greece reviving traditional recipes. He is considered as a trend setter and exceptional personality in the segment of food and cooking.

Gastronomy Celebrity: Vefa Alexiadou

VEFA'S HOUSE, 144 10 Metamorfosi, Tel/Fax: 210-2846.984, E-MAIL: living@vefashouse.gr

Vefa Alexiadou is an author of many books and writes in a wide range of publications and a TV persona. She has introduced new methods in cooking maintaining at the same time the traditional taste of Greek recipes. She has published 11 books which many of them have been translated in English and circulated in UK, Australia, Canada and USA. Her presence in the TV made her extremely popular and her recipes are adopted by many housewives. She is also the owner of a chain of stores providing her books, as well as kitchen equipment which aim at making cooking easier for housewives.

Events & Trade Fairs

Event: Genka Wine Fair

9 Klisthenous St., 105 52, Athens, Tel: 00 30 210 5278500, Fax: 210 5278506, E-mail: info@genkacomm.gr

Genka is an importer of international labels wines and owner of the popular Cellier chain of stores in the country. The company organizes a wine fair every year attended by many wine experts, journalists as well as wine lovers. The fair focuses only on the wines represented by Cellier wine stores with the main aim to familiarise consumers with the products of the chain.

Trade Fair: Οινόραμα

41, Leoforos Karea, 162 33 Kareas Virona, Attica, Tel: (0030) 210 766 0560, Fax: (0030) 210 766 0680, E-mail: info@vinetum.gr

Οινόραμα is a wine fair that take place every two years since 1994 in Athens and gathers all wine producers as well as importers of wine from Greece. The fair is visited by approximately 15.000 visitors,

which most of them are professionals of the Greek wine industry. The next scheduled fair is on March 2008.

Trade Fair: ΔΙΟΝΥΣΙΑ

41, Leoforos Karea, 162 33 Kareas Virona, Tel: 0030 210 766 0560, Fax: 210 766 0680

ΔΙΟΝΥΣΙΑ is another trade fair for the Greek wine producers. The last one was organized in February 2007 and gathered approximately 6000 persons among them many politicians, experts, wine lovers, as well as buyers from Germany, USA, and UK.

Trade Fair: Διεθνής Έκθεση Τροφίμων και Ποτών

Tel: 0030 2310 291 201, Fax: 2310 291 551, E-mail: detrop@helexpo.gr

The trade fair attracts more than 40.000 visitors from around the world with more than 600 exhibitors promoting Greek products in the international market.

Trade Fair: Τα Βοροινά

154 Egnatia, PO 1529, 54006, Thesalloniki, Tel: 2310 281 617, 2310 281 632 Fax: 2310 281 619,

E-mail: info@wineroads.gr

Τα Βορεινά is an annual trade fair organized by the association of wine producers of North Greece. This is a regional fair gathering wine producers from north Greece and attracting wine experts and many wine lovers.

Event: Μέρες Νεμέας

Tel: 0030 6974 642277, 0030 6947044662

Μερες Νεμέας is an annual festival organized the first weekend of September every year by the association of wine producers of Nemea. The festival apart from wine testing includes a wide range of activities like, concerts, children activities, local food tasting etc.

Trade Fair: Αφρός και Φυσαλίδες

41 Leoforos Karea, 162 33 Kareas Virona, Tel: 0030 210 766 0560, Fax: 0030 210 766 0680, E-mail: info@vinetum.gr

Organized by the communication group Vinetum – publisher of wine newspaper Το Αμπελοτόπι – aims at introducing Greek and international sparkling wines and especially campaigns to Greek consumers. The fair is only two years old but the attendance was quite impressive.