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Destination-Centric Wine Exports: Offering Design Concepts and Sustainability

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Abstract: With more than 40% of produced wine crossing borders, wine represents a truly global beverage. Wine export serves as a sales lever, especially for producers where home wine consumption diminishes but the global wine business is highly competitive. The literature tells that in competitive market innovation, customer centrism, and increasing sustainability are key. Wine export offerings need to meet the customer's desires in the targeted foreign destinations. German wine providers have to catch-up in regard to destination-specific preferences so they can offer adaptation or suffer a competitive disadvantage in sustainability positioning. The main aims of this study were to validate the importance of sustainability in wine import and to explore destination-specific preferences and potential sustainable offer designs on the basis of new, fungus-resistant grape (FRG) wines by an explorative, qualitative approach. Evaluating the key export markets for German wine, the study delved into a performance assessment on how German providers who are marked by small-scale structures and fragmentation are positioned in regard to the primary purchasing factors in global wine competition, in regard to sustainability, and how to overcome performance gaps by tailoring destination-specific export offerings. In order to close a lack of research on destination-oriented sustainable wine offer design and to provide orientation for practitioners, an empirical study tested wine export offerings in the form of four concepts with a strong emphasis on sustainability and FRGs. More than 100 wine experts in the five key countries for German wine exports served to explore country preferences for offer elements and perceived performance of German wine producers. The interviews revealed (a) that sustainability is a must for wine export sales; (b) that German wine producers limp in sustainability reputation; (c) the existence of country-specific preferences allowing exporters to tailor their offerings to the specific needs in their ambition to increase export performance; (d) that German wine producers can potentially claim sustainability on the basis of a fitting concept; (e) FRGs are potentially suited to reposition innovatively and sustainably; (f) a playful exploitation of stereotypes for German suppliers is risky; (g) that an offer concept on sustainability and "made in Germany" characteristics (design, technology, and reliability) is highly regarded potentially allowing to escape price cutting in their key export destinations.

Keywords: customer orientation; strategy; innovation; differentiation; sustainable offer components; SME; export management; business model

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1. Introduction

Export serves as a strategic growth option to (1) escape stagnating domestic markets and (2) diversify risks by spreading sales over several different destinations [1,2]. Exports are particularly relevant for agricultural goods [3]. Agricultural products account for more than one-fifth of world trade [4], especially since global wine trade has developed dynamically [5–10]. In addition to cost advantages, which are traditionally decisive for exports, vegetation conditions, and country-specific product characteristics nurture international demand for wine. Wine production requires climatic conditions and the "terroir" concept explains that unique wines can only be produced in certain local conditions [11,12]. As a result, more than 40% of the worldwide wine production is exported [5,6]. This corresponds to a value of goods of over 38 billion euros. Globalization of the wine market also affects products and production illustrated by international wine styles and global wine brands [13–15]. Despite all global caesuras (such as COVID-19-pandemic, climate change, and escalating international conflicts), global trade feeds the world and wine economy [16–19] but faces increasing managerial challenges as reflected in the dependence on international supply chains [20,21]. The globalization of food is evident in the feared consequences of the war in Ukraine that a famine in Africa or other contents can follow the production and transport shortfalls caused by the war [22]. In addition, sustainability is of rising importance in the wine trade [23–25] and promises to be a lever in experiential marketing to increase willingness to pay [26].

German wine did not profit from the growth in international wine trade as wine export halved since 2000 [27,28]. German wine producers are reliable trade partners, but they lack performance in regard to destination-tailored wine offerings and have a competitive disadvantage concerning sustainability positioning [29–32]. To counteract the recently published shrinking of the German wine market [33], German wine producers might need to foster export. The literature does not provide sufficient information on sustainable offer design concepts to win the export market share. What are winning wine export offerings—spanning reliability, innovation, and sustainability—potentially allowing German wine producers to regain a market share in the global wine trade?

Sustainability in a brief definition means not to consume at the expense of future generations [34]. The UN publication "Our Common Future" advocated for elevating sustainability to the status of guiding principle in the interest of making the world safe for all human populations and operationalized the concept as a parallel pursuit of economic, ecological, and social aspects [34–45]. For agricultural enterprises such as wine estates, sustainability is of even higher importance given the dependence on climate and ecology, having drawn a lot attention in the literature on how to manage sustainably in the wine industry [26,46–55]. In the context of wine, exports and imports sustainability encompasses the producer, the product, and the whole sourcing across borders [56].

1.1. German Wine Export

Germans drink about 20 million hectoliters of wine annually and wine consumption in Germany has been stable for years whereas it plummeted in other old wine world regions (for instance Spain, France, and Italy) [28,57–59]. German wine estates predominantly produce wine for their home market, as 90% of German wine sells nationally. Whereas, Germany exports more than 3.5 million hectoliters of wine according to the official statistics, just about 1.2 million hectoliters are Germany-grown wine. The key export destinations for German wine are the USA, Netherlands, Great Britain, China, and Scandinavian countries (Norway, Sweden, and Denmark) [28,60,61] make up for more than half of the exported German wine. However, historically wine export has been a relevant vehicle for sales and, furthermore, a lever to build a reputation for German wine producers. In the late 1900, German wine estates even outperformed famous wine regions and estates in Burgundy or in Bordeaux [15,62,63]. In the last decades, German wine producers did not profit from an increasing global wine trade that doubled since 2000: in the same period, exports of German wines halved from more than 2 million hectoliters of wine [6,15,28,60,64–67]. The wine concept "Liebfrauenmilch" of a white wine blend as a classic "one size fits all" approach lost market attractiveness and German wine production overall reduced significantly from more than 15 million to less than 10 million on average.

Market research companies just recently announced that the German wine market starts shrinking [68]. In case of a shrinking market, producers have to reduce their production (with a negative impact on their profitability and not a short-term option for wine producers since vineyards are planted for decades) or they need to conquer new markets outside of their home region by, for example, exporting their products [5,6,8,10,65,69]. But, Germany's wine producers suffer competitive disadvantages in sustainability, destination centricity, and strategic offer design, and a lack of empirical evidence on how to address those key aspects [30] have motivated this study to explore whether "German wine producers can increase their attractiveness in competitive wine trade?".

1.2. Wine Export Management: Key Success Factors and Sustainability

Successful export is not automatic, it must be actively managed [70]. Success factors in export [71] with reference to research on smaller enterprises [72] are commitment, knowledge, strategy, and export promotion [1,73–76]. For wine exports, empirical studies ascertain that consumers decide on "country-image effects" [77]. Country-specific wines were analyzed for Australia, Chile, USA, South Africa, and France [78]. In the absence of a study on Germany as a country of wine production, this study ambitioned to gain information on a country's perception.

Increasingly, sustainability plays a role in buying and consumer decisions for products and services [47,79–84]. According to Pitelis and Teece [85], modern firms consider sustainability in their innovation efforts to create a competitive advantage. The literature on sustainable wine production is growing, with a focus on the strategic value of sustainability [47–49,55,86–90]. Wine's global trade and the consumer's choice for wine motivated research that explores sustainable wines from a marketing perspective [53,80,91–95]. Recent literature claims a need to embed sustainability in export offerings [96–100], but not providing details offer details. The literature expresses that sustainability in the wine industry is an ongoing, developing topic and a transformational phenomenon requiring further research as well as practical implementation and learning [46,49,51,101,102]. Ecopreneurship—characterizing sustainability-driven ecological orientation and entrepreneurship—has become a major presence in the agricultural realm, illustrated by the growing number of biological, organic, and biodynamic farms [49,103,104].

The goal of the German government that 25 percent of arable land will be organically farmed by 2030 is expected to motivate German growers to switch to organic farming, given that only 10 percent is farmed organically at present [105,106]. This also holds true for German winegrowing, which has a lot of catching up to do when it comes to ecologically farming. In regard to sustainability, winegrowers in New Zealand, Chile, South Africa, and California make a habit of publicizing their sustainability measures and the benefits thereof [49,52,54,80,88,107]. Is sustainability hence a suitable lever to differentiate in the German wine industry?

The scientific publications afford a further penetration of export management itself as well as the validation of models for the explanation of success factors, also in the case of wine exports [108,109].

Scandinavian countries are cited as role models and pioneers in sustainability, climate protection, and renewable energies [110–112]. An accentuation of ecological aspects is also revealed in wine consumption in these destinations [113]: for instance, in Sweden, organic wines make up for more than one-fourth of all sold wines [113,114]. Climate-friendly packaging (e.g., lightweight glass bottles, bag-in-box, and PET bottles), social working conditions, and the reduction of the CO_2 footprint increasingly determine the tenders of the Swedish wine monopoly tenders. Similar developments can be observed in Norway, where societal demand for sustainable products is incorporated into tender conditions for bids and delivery requirements by the wine-buying monopoly. Thus, sustainable production and offer design will become an increasingly important success factor for wine exporters in these markets. The Scandinavian markets have become key wine sales destinations for German wine [28] and hence raise the issue of whether German wine producers not being perceived to meet the rising standards of sustainability and risk to lose key markets. Hence the research question "whether sustainability is of relevance in wine imports and how is German wine perceived in regard to meeting eventual sustainability expectations?" was raised.

1.3. Exploring Destination-Centric and Sustainable Wine Export Offerings

In highly competitive markets, such as the wine industry, innovative customer-centric offerings are key [115–118]. Maurel examined internal and contingency factors' impact on export success for French wine exporters [119] and discovered that besides company size, export orientation, commitment, and innovation was a key success factor. In the past, suppliers benefited from a "seller's market" (market-pull). Manufactured goods, products, or services were in short supply and naturally found a ready market due to excess demand, without the need for individualization or marketing efforts on the part of suppliers. As a result, mass goods satisfied the growing demand. With a rising productivity of the factories, higher production output, technology, and increasing competition, the range of products became more abundant. A sales-oriented marketing paradigm pushed new offerings and variety. With abundant offers, marketing, especially advertising served to steer consumer decisions (market-push). Today's dominant predatory markets, signaling "buyer's markets", ask for individualization, customer-oriented solutions, and proactive, flexible offer design with recourse to data and digitization [120–124]. Convincingly, coherent concepts turn customers into brand lovers [125,126], also in the case of exports [74,127–129].

The increasingly industrialized wine world appears to be a good example for having a closer look at customer-centric offer design and is a relevant success factor in exports. Indeed, German wine producers suffer low concentration on the supplier side whereas large, globally active wine groups of other wine-producing countries (e.g., Constellation Brands, Gallo, Concha y Toro . . .) can profit from their international distribution networks, export experience, worldwide market knowledge, and access to financial markets [27,130–132]. The ability to deliver large quantities of wine ensures these suppliers an advantageous negotiating position vis-à-vis the trade. Henceforth, in lack of size German wine producers need to win export market share by creating attractive, innovative, and fitting offers for consumers in the target markets. Indeed, experiential marketing is increasingly important since "experiential" attributes fulfill the emotional utility of wines by hedonic or symbolic values to be experienced with senses, pleasures, feelings, and emotions [26,133–138]. Since previous studies on German wine export concluded that German producers are highly regarded for their reliability and their good knowledge of destination markets but lack an adaptation of their offerings to meet target markets [29] and often emotional value in the export countries, this study explores destination-specific offer designs to overcome the identified deficit [30].

2. Materials and Methods

World wine trade has increased enormously and more than a third of the wine produced crosses borders. German wine, on the other hand, has not benefited from increasing export activity over the last two decades. The hereby reported study explored whether German wine suppliers can strategically exploit export market potential on the basis of destination-oriented, sustainable offerings. In lack of empirical information on "how wine destination-specific export offerings of German wine exports could look like and to what extend they potentially suit German wine producers?", this study created and tested four different offer concepts with an online survey exploring preferences. All four presented wine offering concepts were described to consist of wines produced out of newly bred fungus-resistant grape varietals (FRG) (such as Regent, Cabernet Blanc, Calardis Blanc, and Sauvitage). These varietals allow vintners to reduce their phyto-sanitary spraying activities. Increased cultivation of new, robust grape varieties serves to achieve the ambitious Green Deal goals and ensures necessary efficiency improvements in view of the increasing cost pressure [105,106,139]. FRG wine builds one element in a research project assessing ways to reduce copper-containing pesticides in organic viticulture and were hence motivated to explore whether new varieties in conjunction with sustainability effects can serve to increase export opportunities of German wine producers playing on the key export success factors of innovation, sustainability, and customer centricity. For this purpose, the expert survey on export opportunities for German wine through innovative concept designs based on sustainability aspects and FRGs, an explorative approach of grounded theory [140–143]. The questionnaire was built on the assumption that new FRG wines allow to overcome the positioning deficit of German wine exporters in regard to global players as well as dominant wine export countries such as France, Italy, and Spain by meeting sustainability expectations. In addition, the survey assessed different aspects and elements to assess the prominence, elements, and communication of sustainability. In order to scrutinize the export prospects of German wines under sustainability aspects, especially in the context of organic products and new and more sustainable grape varieties.

The survey targeted the core export countries of German wine (USA, The Netherlands, Great Britain, China, and Scandinavian countries). Global experts in these selected markets were polled about their purchasing decision factors in general. They were polled on sustainability, their perception of German providers in the wine industry in regard to the offer elements, and preference in regards to a choice of concepts. An online survey was conducted via "SosciSurvey". More than 1000 key wine import experts for the key wine export countries were identified with the help of supportive stakeholders of German wine exports (i.e., wine producers in Germany; wine export agencies; wine publishing houses . . .). The created pool of potential interview partners contained e-mail addresses of representatives from import agencies, wine journalists, and wine professionals in the targeted countries. The survey was completely filled out by 107 experts. Participants from the Netherlands dominated the survey, representing almost one-third of the respondents. The following places were Great Britain (one-fourth), USA (one-sixth), and China (10%). Scandinavian countries jointly made up for 20% of the survey participants. Later country comparison was limited to the Netherlands, Great Britain, and the USA given the low representativeness of country-specific experts setting a minimum of 15 participants per country. The explorative, qualitative approach built upon phenomenological research methodology: " . . . Phenomenological researchers . . . are interested in the way people experience their world, what it is like for them and how . . . best to understand their experiences . . . Sampling requires identification of appropriate participants, being those who can best inform the study and may involve small numbers of participants" [144]. The limited number of survey participants cannot claim representativeness but serves social sciences cross-cultural research [145].

The questionnaire explored the importance of offer elements in the buying decision and the perceived performance of German wine suppliers by a five point Likert scale (1 = not relevant; 5 = highly relevant) [146]. The questionnaire thereby assessed environmental challenges, strategic measures to counter environmental pressure, strategic offer design [147,148], topical sustainability activities, and a self-assessment of performance as proposed in the literature [149]. The survey allowed a comparison of the relevance of offer design aspects with perceived performance (see Appendix A). For practitioners and wine suppliers, elements that are perceived to be particularly relevant in the view of the interviewees but a large gap compared to perceived performance should be of prime interest to take according actions in order to increase effectiveness and performance. Following, four different wine concepts were tested (also five point Likert with the exemption assessing "probability to buy" on seven point Likert scale) [150].

The four alternative concepts created all claimed sustainability (values and communica tion)—but to different extend and by different means and elements in the offer. A convincing argument for sustainability was set for all concepts by presenting fungus-resistant wines (FRG) as the core product of export for every concept [151–153]. FRG are becoming a relevant building block in sustainable wine production, as the core challenges to sustainable wine production (e.g., less pesticide application, less crossing, decreasing fuel consumption, lower CO_2 emissions . . .) can be delivered and thereby communicated more easily [154,155]. In Germany, FRG (often referred to as PIWI, i.e., "pilzwiderstandsfähig"—fungus resistant [156]) are receiving high attention in recent months, which is reflected in growing acreage and demand for planting material. Partially, rising interest finds explanation in FRG reduced phyto-medical treatments and, therefore, becoming a lever to meet EU green deal targets to half fungicides since vines are heavily dependent on the use of fungicides [105,106,151–153,157,158]. FRG are enjoying increasing national consumer attention because of increasing media exposure and product listings in retail that nurtured the idea to frame the offer design to represent new and innovative market approaches and positioning opportunities in sustainability-conscious export markets on the back of FRGs. It opened the opportunity to test the value of complementing sustainability offer components such as organic certification or climate friendly.

The four alternative sustainable concepts were introduced to the interviewees in the form of words and images (see Table 1). The concepts leaned on global best practices (e.g., "The arrogant frog" (a French wine brand exploiting stereotypes of the UK vis-à-vis the French: ARROGANT FROG French Humble Winemaker with a sense of humor (arrogant-frog.com (accessed on 15 June 2023)); yellowtail, an Australian brand strongly positioned as easy-drinking wine: [yellow tail]: Great Wine. For All. (yellowtailwine.com (accessed on 15 June 2023)). Subsequently, the respondents were asked for their assessment of suitable packaging, communication aspects, wine style, the appropriate price level, and the likelihood of the product range being taken into account when importing wine [136–138].

Table 1. Overview tested concepts.

Concept Title	Sustainability	Made in Germany	Stereotypes	Lifestyle
Concept idea	Pointing out the sustainability (benefits regarding resource efficient viticulture, biodiversity, saving emissions ...) with strong emphasis on FRG.	Germany is internationally perceived for technology, innovation, and precision (machinery industry; cars): Newly bred varieties are a result of long-term research and engineering "made in Germany".	Germans are punctual, wear traditional clothes, and party (Oktoberfest). Playful usage of stereotypes likewise "the arrogant frog"	Wine drinkers want to enjoy it! No matter about origin, variety, or wine production. Wine enlightens easy living (e.g., a picnic, BBQ, cooking with friends or just having fun)
Key words	Sustainable viticulture, climate protection, eco-friendly, biodiversity, nature	Reliability, trust, precision, engineering, grapevine breeding	Lederhosen (leather trousers), tradition and customs, "German humor", Cool Climate	urban, fun, lifestyle, freedom, trendy, easy-drinking

3. Results

In the following, the results in regard to (1) preferred offer elements and perceived performance of German wine producers, (2) concept performance, and (3) destination-specificities are presented.

3.1. Key Offer Components

In the view of the respondents, sustainability aspects (e.g., sustainable products, sustainability of producers, climate-friendly packaging, climate neutrality, and organic certification) form the key aspects of wine import decisions (Figure 1).

The perceived performance of German wine suppliers for the decisive elements queried identifies strengths but also performance deficits. Germans perform particularly well in less crucial aspects such as vegan wines (Figure 1 descends from over-performance to the criteria with the largest performance gap). Interviewees judge German suppliers to over-fulfill expectations for lesser-valued elements. With regard to the sustainability attributes, German producers are not rated on par with the importance attributed, indicating a competitive disadvantage.

The assumption that German wines do not meet the expectations of export markets in terms of sustainability was mirrored by participants' perception of German wines (see Figure 2): For the intrinsic product attributes of good taste and high wine quality, German producers receive high ratings. For values associated with modern lifestyles, German wines underperform.

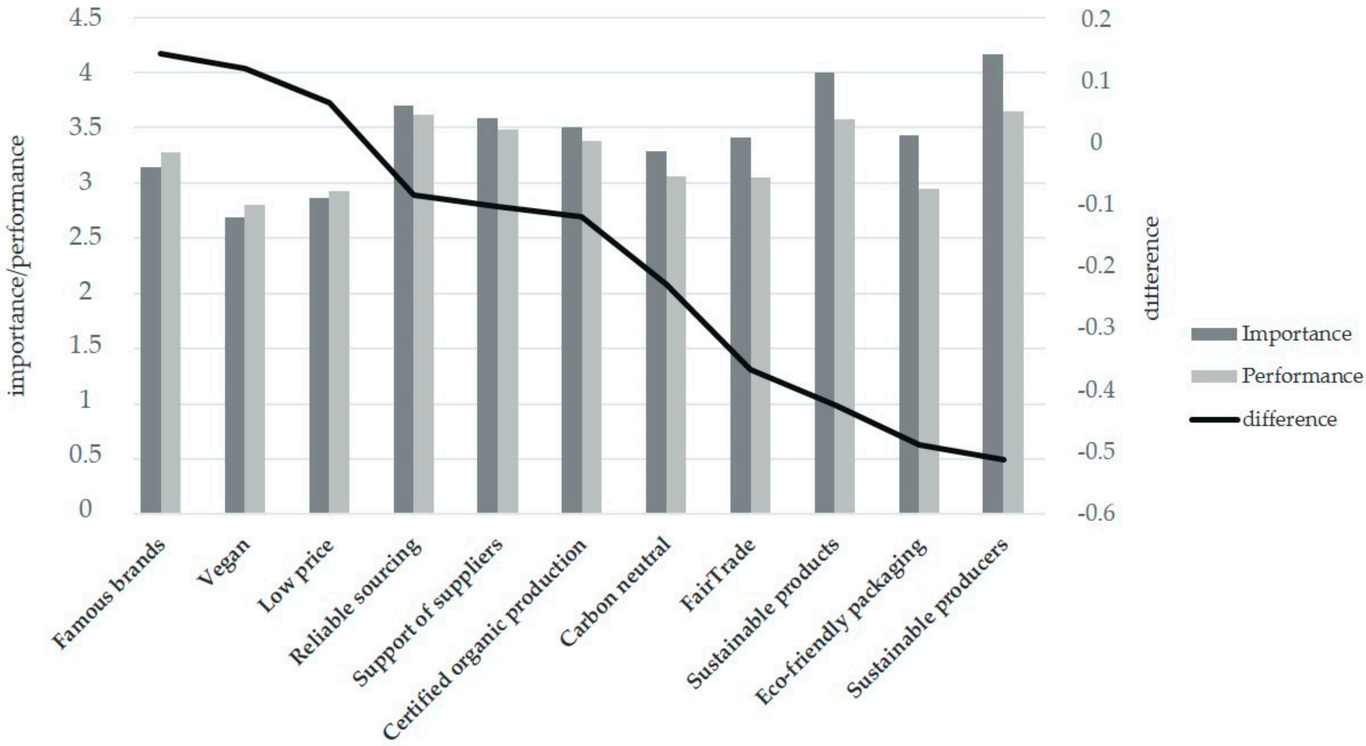

Figure 1. Importance of wine export offering elements and perceived performance of German wine suppliers (1 = very low importance/performance; 5 = very high importance/performance).

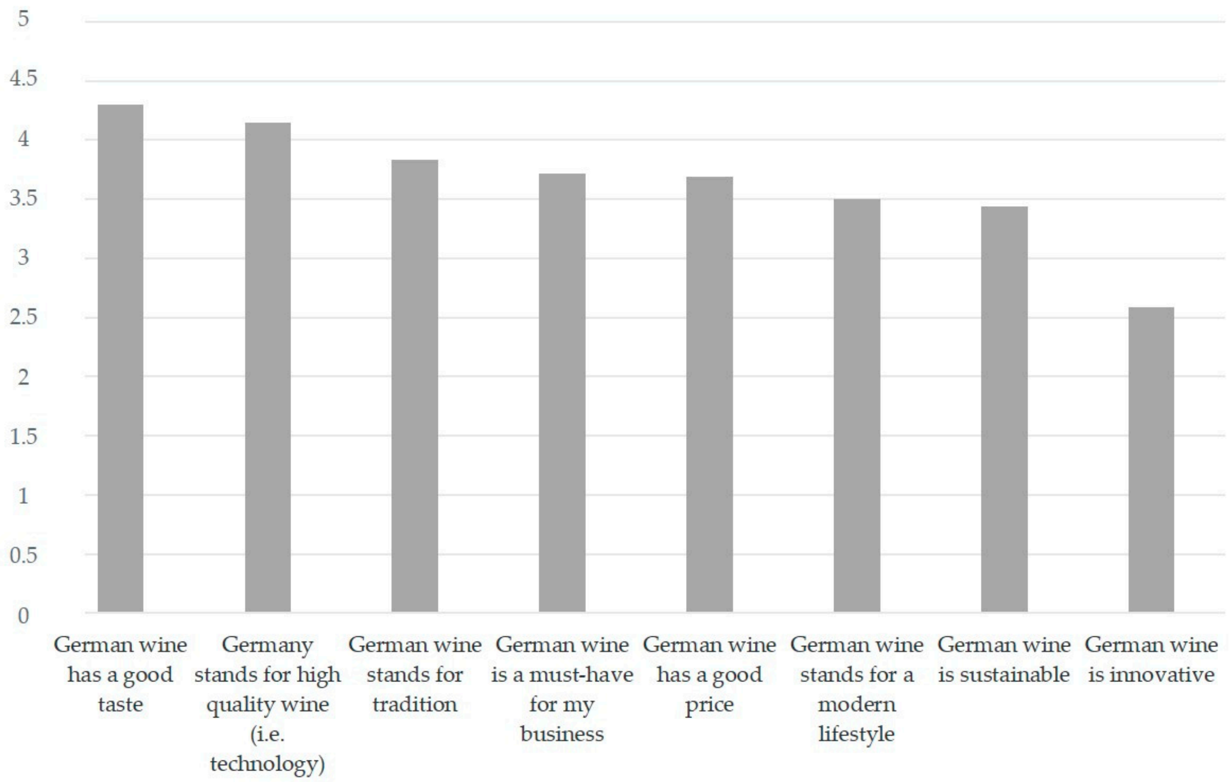

Figure 2. Rating of German wine performance (1 = very low importance/performance; 5 = very high importance/performance).

3.2. Concept of Sustainable Design

The survey results underline that an offered design concentrating on sustainability increases the likelihood of purchase: the concept named “sustainability” achieves by far the highest value in terms of product range consideration and probability of purchase across all country experts (see Table 2). It is followed by “Made in Germany” and then “Lifestyle”. The approach of taking up German stereotypes and combining them with humor or exaggeration in marketing occupies the last place among the respondents. This feedback supports the initial hypothesis that a sustainability-focused wine concept is highly topical in export destinations and that, in conjunction with environmentally friendly grape varieties, sustainability can be communicated in a convincing and comprehensible way.

Table 2. Concept valuations.

Concept Title	Sustainability	Made in Germany	Stereotypes	Lifestyle
Attractiveness/Probability of purchase (1–7)	5.8	5.4	3.8	4.7
Packaging				
Light bottle	63%	53%	15%	50%
Bag-in-Box (BiB)	11%	4%	13%	22%
Price level				
Entry	14%	10%	48%	38%
Medium	68%	57%	39%	53%
Premium	44%	52%	26%	25%
Super premium	15%	15%	6%	5%
Wine style expectations				
Low alcohol, fruity ...	16%	10%	13%	36%
Complex and rich	34%	43%	30%	21%
Nature style (e.g., Orange, PetNat)	41%	19%	10%	25%
Sparkling ...	8%	12%	10%	36%
Relevance of ... (1–5)				
Region/origin	3.5	3.7	3.2	2.8
Varietal	3.3	3.4	2.8	3.0
Organic certification	4.2	4.0	2.7	3.4
Certified sustainable	4.3	./.	./.	./.

Furthermore, the survey informs about coherent and characteristic offer design to address target groups and allow differentiation as follows.

3.2.1. Export Concept “Sustainability”

In line with the assumption that sustainability is a relevant buying variable and the stated relevance of sustainable decision variables for wine imports, sustainability plays an important role also in the form of an overarching offer design concept. A design concept, in which sustainability is emphasized by name and documented with a seal, performs best in the assessment of purchase probability. In the view of the respondents, this concept helps to boost profitably by medium to higher price segments. Both, a light, fruity wine and a “natural style”, i.e., an Orange/Natural Wine or Petnat (“Pétillant Naturel” = natural sparkling) are judged to be fitting products [159]. Environmentally friendly packaging, particularly a lightweight glass bottle, and organic certification are also associated with the concept. Numerous accompanying comments in the interviews underlined that an explicit reference to sustainability by FRG wines is not sufficient to market a sustainable offer concept. Sustainability needs to be presented in an understandable, transparent, and holistic way, as the term is often overused and there is no uniform understanding by the consumers. Accordingly, this concept advocates the use of a certified sustainability seal and accompanying communication of sustainability measures [56,80,113]. By a coherent and holistically embedded design, such a sustainability-focused offering is beneficial: good wine quality, innovative product, appealing packaging, and an associated “story”.

3.2.2. Export Concept "Made in Germany"

In the view of the interviewees, there is a potential for a marketing approach based on values associated with Germany, such as reliability, design and precision, on the backbone of innovative grape varieties and sustainability. Obviously, the conceptual world of technology can also score points with the emotional product of wine. In this context, FRG fit being purposefully researched and designed in a technology-characteristic way. In terms of price, this concept offers the potential to be positioned as a premium and high-price offering. From the point of view of the interviewees, it is suitable for sophisticated wines (see wine style and advantageousness of origin and grape varieties) despite that FRG grape varieties are unknown. This offer concept fits organic cultivation and an accompanying organic certification, potentially reaching target groups with an affinity for wine. The concept offers the chance to win conservative consumers for innovative FRG. The responses indicate that in such a strategy new grape varieties serve as vehicles to win export market share in a modern and future-oriented way. Indeed, new grape varieties reemphasize the "made in Germany" values (reliability, technology, and design) and serve creative marketing approaches and storytelling [160–164].

3.2.3. Export Concept "Stereotype"

A conceptual consideration to playfully exploits existent stereotypes was motivated by a successful market launch of the French wine supplier "the arrogant frog". It played on the prejudices and clichés of foreign countries, especially in England, against the French in its brand name and appearance: "The French eat frogs' legs and are arrogant represented on the label by a wide-mouthed frog with a dandyish stick with resounding success" https://www.lakaaf.de/Regionen/Frankreich/Languedoc/Arrogant-Frog/ (accessed on 15 June 2023). For German wine, an equal marketing strategy seems less promising to attract customers abroad. With a purchase probability of 3.8, the concept ranked least of all four concepts. The price level of such an offer design was judged to primarily be in the entry-level price range. Sustainability is also difficult to emphasize herein, the stereotype dominates and, therefore, cannot play out any key success factors in terms of sustainability.

3.2.4. Export Concept "Lifestyle"

The concept of a lifestyle wine made from FRGs intended to win a young, urban target group or that of the Lohas, which the interviewees felt was easily achievable. Lohas (Life of health and sustainability) are people who maintain a sustainable lifestyle and attach importance to health, the environment, and social issues [165,166]. Lohas are conscious about sustainable products and are characterized by lower price sensitivity. Their sustainable lifestyle is not expressed in renunciation but in conscious consumption. Lohas have an above-average education and an above-average income, which makes them a highly interesting target group for companies. According to the interviewees, the price positioning of a lifestyle-based concept suits medium price ranges, which speaks for easy-drinking and younger consumers with less wine experience. In fact, traditional purchase decision characteristics, such as geographic origin, are judged by the experts to be less influential in this concept. The focus is on the brand and the striking design, and the approach is thus well suited for blends without a designated grape variety or area. The respondents see a good chance of emphasizing sustainability in connection with innovative accents, e.g., ecological products in the alternative, climate-friendly packaging. The assessment of the appropriate wine style is also interesting: the majority assigns a fruity, uncomplicated wine style to the concept. More than one in three respondents judge sparkling or semi-sparkling wines as a suitable product basis on this concept—in the way that sparkling Prosecco enjoys great demand in the according target groups. Such an export offering allows the marketing of FRG wines as an innovative, modern, and conscious lifestyle. An innovative "light wine" with reduced alcohol content is predicted to have high market success. This concept not only meets the needs of wine consumers who want sustainability orientation, alternative packaging and lower alcohol content, but it is also strategically acted according to the goals of the EU recognizable in the alcohol policy and the European "Green Deal" [167].

3.3. Country Specific Insights

In light of the small number of interviewees per country, the analysis of country-specific insights was restricted to the three most actively participating countries (UK, The Netherlands, and USA, see Table 3). Indeed, the following results cannot claim to be representative given the few numbers of survey respondents. However, country-specific preferences provide impulses for customer-centered, sustainable offers or motivate future research to explore country-specificities.

Table 3. Overview tested concepts.

Concept	Overall	UK	NL	USA
Sustainability	5.8	5.7	5.8	5.6
Made in Germany	5.4	4.6	5.9	4.9
Stereotyp	3.8	3.3	4.4	4.5
Lifestyle	4.7	4.3	4.5	4.7

3.3.1. Export Concept for UK

German wine in the UK—historically one of the most important export markets for German wine—has been suffering from a massive loss of market share for some time, fueled by the UK's exit from the European Union. As a result, wine exports have continued to plummet in value and volume, and the average price of German wine exports is very low at less than €2/L. Reinforced by the pandemic, fewer and fewer young consumers in the UK are finding ways to enjoy wine consumption; there is a lack of a growing target group. Thus, the British market remains challenging for German wine exports and German-quality wines continue to lose market share in the price-aggressive British market [168].

In this difficult market environment, the survey opens up starting points for improving the positioning of German wine by FRGs by addressing younger consumers. In Great Britain, dealcoholized or alcohol-reduced (and thus low-calorie) wines are a growing market segment. Accordingly, the country experts have attributed a high market opportunity to the "lifestyle" concept approach, as it picks up on these market trend. The concept fits a mid-price range and is associated with a lightweight glass bottle by three-quarters of respondents; organic certification is also of above-average relevance. The "sustainability" concept promises a higher price positioning on the back of "natural wines", i.e., Orange Wine or PetNat. Innovative wine styles in combination with ecological benefits (FRGs in lightweight glass bottles) become the key to export success in the UK. Such an approach also can benefit from an increased willingness to pay. It was striking that the concepts "Made in Germany" and "stereotypes"—both closely linked to Germany's image—have a below-average acceptance in the British market. A modern and winning sales approach based on FRGs, sustainability, and low alcohol levels without marketing emphasis on German values seems advisable. Irrespective of a possible positioning, the operational advantages of FRGs are relevant in the price-aggressive market, such as in Great Britain, such as cost savings through reduced crop protection. This is a lever to increase profitability in the long term, even in the entry-level price segment.

3.3.2. Export Concept for the USA

The USA is the most important export market for German wines and the largest consumer market in the world. However, it is a very dynamic wine market and German exports have been under considerable pressure in recent years. Above all, punitive tariffs on European wines and changes in consumption during the Corona pandemic have caused German wine exports to the United States to plummet by 19% in value and 6% in volume [60]. German wines account for only a 1% volume share of the U.S. wine market. It is being discussed for the USA wine consumption will decline slightly in the next few years and reduced alcohol consumption by the up-and-coming target group will increase [169]. In addition, "natural wines," which are perceived in the U.S. market as healthier, more environmentally friendly and attractive in taste, offer market potential [159]. Alternative packaging to glass bottles, especially cans and small bottles ("1 portion") is also of increasing relevance in this target group, albeit currently still at a low level [170].

The responses from the U.S. experts in the survey identified two positioning alternatives for German FRG wines suited to a profit from the market transformation.

The concept of sustainability is rated by U.S. experts as a promising marketing approach and is associated by respondents with a "natural style" that is seen as having high market potential. From the experts' point of view, a sustainability seal helps to conquer the market, with the environmental benefit of lighter bottles or bag-in-box as concept elements. The experts believe that a sustainability-based offering provides the opportunity to achieve high-quality brand recognition, mostly in the premium and high-price segments. For younger target groups, a "lifestyle" offer concept with FRGs is welcomed. It is noteworthy that 60% of the US respondents welcome a "free-of" product as a wine style, i.e., a reduced-alcohol, fruity, and residually sweet wine, bottled in a can or small bottle, with a price positioning in the entry-level segment. An improved environmental effect is more of a secondary benefit for the U.S. market, but for the production side it offers the chance to play off in-house advantages of FRGs such as cost reduction and modern flavor profiles of the grape varieties. Surprisingly, the "Made in Germany" concept proves to be suitable for the premium segment.

3.3.3. Export Concept for the Netherlands

Even if sales of German wines in the Netherlands are declining according to statistics, the neighboring country is a primary export destination for German wine with a volume of over 100,000 hectoliters [60]. The average price of 2€/l is though below the export average. The Netherlands suffers from declining wine consumption, although recently a premiumization in the Dutch wine market can be observed [171]. Wines in the price category above €5 in the food retail trade are no longer the exception, as was the case a few years ago. Experts state a trend for sustainability, which was already evident before the pandemic. For Dutch consumers, a lower alcohol content of the wine is increasingly a criterion for purchase, especially in the under-35 target group. Current market data confirm a growing interest in organic, sustainably produced or environmentally friendly wines, but less pronounced than in other European countries [159]. The positioning and consumer acceptance of FRGs in the Dutch market is supported by the fact that the country itself is increasingly growing grapes, currently on an area of 200–300 hectares, with new grape varieties dominating. Domestic production increases awareness of the grape varieties and fuels interest therein.

Dutch respondents communicate little preference regarding the alternative concept approaches. All concepts presented are also judged to possibly be placed at higher prices in comparison to the other country evaluations. Natural wines are rated to be attractive in all concepts, which seems to be suitable as a pathfinder for FRGs. A concept approach with recourse to "Made in Germany" with lightweight glass can possibly present a premium approach. Lightweight glass bottles increase the market attractiveness of all proposed offer concepts across. Wine sales in conjunction with "sustainability," especially natural wine, are also attributed a premium price level with a high likelihood of purchase. Bag-in-box packaging is also located among the lifestyle approaches, which corresponds to Scandinavian market preferences [159].

Even if no favored concept for positioning FRGs can be derived from the survey results in the Netherlands, the experts' responses indicate that "sustainability" increases purchase interest among Dutch wine consumers and allows higher price positioning. FRGs can, therefore, form an important component in a holistic and transparent offer concept for increased penetration and an accompanying increase in the value of the offer in the market development of the Netherlands.

4. Discussion

The results reinforce the hypothesis that sustainability has become highly relevant in purchasing decisions—also for wine crossing borders. Strategic positioning and sustainability require synchronization [41,89,172–174]. In regards to strategic profiling of wineries, Atkin et al. (2011) concluded a fit of environmental orientation regardless of the chosen strategy. Wine regions such as Chile, New Zealand, South Africa and California were early on positioned to be sustainable by certifications and labels [49–55,86]. The study results underline that German wine, in lack of such positioning, experiences a strategic competitive disadvantage. The results offer an eventual short-cut for German wine growers to overcome the inferior sustainability profiling by exporting FRG in orchestrated sustainable offerings. For suppliers of organic products, attractive market prospects continue to emerge, but organic or biodynamic cultivation should be embedded in a sustainability strategy. Certification can serve as proof of concept [50,175,176]. However, certification can be a costly process and requires not only financial resources [52,56,89,177–179]. Customers—and in the context of exporting import agencies, retailers, export agencies, and wine monopolies—can be a driving factor in asking for certified sustainability. In interactions with interested customers, certification can underpin sustainability activities and increase credibility.

For the world of wine with its high emotional utility sustainability promises to serve as a suitable lever to increase prices and thereby the profitability of the German wine industry. These findings allow German wine providers to catch-up in regard to their deficit in destination-specific offer adaptation and the competitive disadvantage of a lower reputation for sustainability, a potential threat not only for destinations where monopolistic buyers increasingly determine sustainability as a must. Having assessed a predominantly small enterprise industry, the study contributes to the subject matter of small and medium-sized companies' export management. Due to the increasing competitiveness within the domestic German wine market, as well as the simultaneous growth of population and wine consumption in foreign countries, German providers regard wine export as an enhancement of sales opportunities [28,68]. Thus, the acquisition of knowledge appears to be highly essential for the practice, since the successful market cultivation necessitates professional management of the relevant success factors, especially since German wine producers are predominantly small entrepreneurs they potentially suffer resource restrictions in comparison to larger wine companies from other wine-producing countries [180–182].

In previous studies, German wine producers have attested a high professionalism in export [30]. Global wine experts particularly appreciate the exporters' in-depth knowledge of the market, reflecting high esteem for Germany as "oiled machine"—hence, high reliability and fair treatments [124,183–186]. The above-presented results thereby reinforce prior findings in regard to the fulfillment of export success factors by German wine producers with a need to take action. Indeed, German wine producers need to create innovative, country-fitting offer designs [187–189]. Three of the presented concept ideas (sustainability; made in Germany; lifestyle) were rated as attractive vehicles to conquer export destinations. The presented results give practitioners orientation on how to tailor wine export concepts to turn the performance gap into a competitive edge.

In line with previous research, the study reemphasizes that consumers in wine-exporting countries decide not only on wine preferences but also on the basis of the image associated with the country of production, the "country image effects" [4,75,119,190–192]. These country images are shaped by the acting suppliers, offers, and country stereotypes. Innovation plays a pivotal role in gaining attention in the face of rising wine qualities, increasing professionalization of suppliers in export, and rising expectations of wine consumers. Indeed, the interviewed experts reemphasized that innovation and sustainability determine purchasing decisions in the international wine trade. FRGs potentially allow

German producers to leapfrog marketing deficits. Wine producers should find relevant aspects to tailor their offers to meet expectations and preferences in targeted countries.

5. Limitations

The study suffers several limitations. This exploratory research guided by grounded theory suits to assess the identified practically relevant questions, but the results are not representative given the low quantity of responses [142,143,193]. Indeed, the country-specific insights are just starting points in the light of a few respondents. Such an experiential approach, where interviewees opt for four different offer concepts in an online survey further suffers a potential bias of socially expected answers as well as an undetectable misinterpretation of the presented concepts. Overall, the results predominantly support prior findings and the derived new insights are to motivate researchers to test the presented concepts in the context of other industries or apply for different wine countries, guide research in regards to testing offer design alternatives, and in the assessment of innovation practice.

6. Conclusions

Sustainable wines open up market opportunities for exports. However, German wines are at a competitive disadvantage in this respect. Producers and regions from other countries have positioned themselves to be sustainable at an early stage and the survey reveals that this is anchored in the minds of the interviewed import experts and decision-makers. German wine producers show the largest gap between relevance and fulfillment by suppliers with regard to the increasingly decisive assortment criteria of sustainability. However, the study identified alternatives and opportunities to position German wines in relevant target markets by creating winning offerings and thus addressing the needs of young and sustainability-conscious target groups in the export destinations. If this is realized on the basis of new, fungus-resistant grape varieties, then the increasing demands from both consumers and politicians can be met potentially as an express way. In the long term, wines made from fungus-resistant grape varieties offer the potential to reposition German wine, currently perceived as tradition-bound and less innovative, and can serve to overcome potential supply restrictions of small-parceled terroir wines. With strategic repositioning, suppliers meet the needs of the next generation, whose lifestyle is characterized by conscious consumption. Coherent concepts with new grape varieties and sustainability communication can remedy the positioning disadvantage of German producers. Three of the four concepts surveyed promise attention and differentiation based on FRG and individual design freedom.

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Appendix A

Survey questionnaire

Part 1: classification of interviewees and general assessments

1. What business is your company in?
    a. Importer
    b. Wholesaler
    c. Retailer
    d. Producer
    e. Monopoly
    f. Agent
    g. Other

2. In which country is your business located?
3. From the following list, please tick the tree most important attributes that describe your sales strategy:

Price Leadership	Service and Advice
Design	Sustainability
Tradition	Brands
Newcomers	Broad range of countries and origins
Special Demand (e.g., "free-of", special packaging)	Premium/Fine Wine

4. How is your share of German wines by turnover? . . . %
5. Considering German wines, how would you evaluate your sales strategy? My sales strategy for German wines is mainly:

Price	**Wine Style**
Entry level	Easy-drinking white
Medium price	Easy-drinking red
Premium price	Premium dry
High-end	Premium sweet

6. How would you rate the importance of the following attributes for your wine business in general? (scale 1–5, "very important" bis "not important")
    a. Famous brands
    b. Low price
    c. Reliable sourcing (i.e., volume provision)
    d. Support of suppliers in sales activities
    e. Organic, certified production
    f. Eco-friendly packaging (e.g., light bottle, Bag in Box)
    g. Vegan
    h. Carbon neutral
    i. Fair Trade
    j. Sustainable products
    k. Sustainable producers
7. How would you rate the performance of the following attributes for German wines? (scale 1–5, "high performance" to "low performance")
    a. Famous brands
    b. Low price
    c. Reliable sourcing (i.e., volume provision)
    d. Support of suppliers in sales activities
    e. Organic, certified production
    f. Eco-friendly packaging (e.g., light bottle, Bag in Box)
    g. Vegan
    h. Carbon neutral
    i. Fair Trade
    j. Sustainable products
    k. Sustainable producers
8. Do you agree with the following statements about Germany and German wine in general? (scale 1–5 "I totally agree" to "I do not agree at all")
    a. German wine has a good taste
    b. German wine is sustainable
    c. German wine is innovative
    d. Germany stands for high quality wine (i.e., technology)

e. German wine has a good price
f. German wine stands for a modern lifestyle
g. German wine stands for tradition
h. German wine is a must-have for my business

Part 2: Evaluation of PIWI concepts

In recent years, German winemakers offer newly bred grape varieties (PIWI; i.e., Fughus Resistant Grapes) like Cabernet Blanc, Muscaris or Souvignier Gris. They enable sustainable, eco-friendly viticulture with reduced plant protection and less soil compaction and emissions. The research project is identifying suitable paths to address international wine consumers.

We are now introducing four different communication concepts to position wines from new grape varieties in your country. Please evaluate the concepts according to their suitability and sales opportunities for your business and your customers.

	Sustainability	Made in Germany	German Clichée	Lifestyle Product
Keywords (for text and design)	Sustainable viticulture, climate protection, biodiversity	"Made in Germany": Reliability, trust, precision, technology, engineering, cars	Cool climate, Garden gnomes, German "sense of humour"	Modern design No focus on origin, variety, sustainability
		Made in Germany		

Concept test 1: "Sustainability" (identical questions for all concepts)

1. Which packaging would you expect for the concept "sustainability"?
    - Normal bottle
    - Bottle with reduced weight
    - Bag-in-Box (BiB)
2. Which sales channels would you evaluate most suitable for the concept "sustainability"?
3. Which price level would you evaluate most suitable for the concept "sustainability"?
    - Entry level
    - Medium level
    - Premium level
    - High-end
4. What kind of wine style would you associate most with the concept "sustainability"?
    - "Free-of": Reduced alcohol and calories, fruity, semi-dry
    - Light-bodied: Crisp and fruity, easy-drinking, low-to-medium alcohol, off-dry
    - Medium-bodied: Rich with medium alcohol, ripe flavours, dry, lightly oaked, to serve with food
    - Natural style: e.g., Orange or Natural wine, Pet Nat, reduced sulfur
    - Sparkling: Prosecco-like wine style
5. How would you rate the importance to mention the following terms on the label for the concept "sustainability" (scale 1–5, "very important" to "not important"):
    a. Wine growing region (e.g., Pfalz, Baden, Rheinhessen)

   b. Grape variety (e.g., Cabernet Blanc, Muscaris or Souvignier Gris)
   c. Organic production
6. How would you evaluate the chance that a German wine with the concept "sustainability" will be included in your range? (1 = very unlikely to 10 = very likely)

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