



*Office International
de la Vigne et du Vin*

Wine Marketing Short Course

July 9-27, 2007

**at the University of
California, Davis**

**UC DAVIS
EXTENSION**

PROFESSIONAL AND CONTINUING EDUCATION

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Office International de la Vigne et du Vin



Wine Marketing Short Course

July 9-27, 2007

General Information

Dates and times

Mondays-Fridays, July 9-27, 8:30 a.m.-5 p.m.

Location

Wellman Hall, UC Davis.

Enrollment fee and deadline

\$2,700 for the full three-week course (includes course materials and field trips. Meals are not included). **Enroll in section 071VIT200.** See enrollment form for other enrollment options. You may enroll by the week for \$1,100 per week, but *participation on field trips is not included* in the per-week fee. One-day enrollments are available for \$300 per day, however this does not include field trip days. The field trips are not an option unless you're enrolled in the full three-week course.

For more information about program content

Contact UC Davis Extension at (530) 757-8899.

Refunds and cancellations

Refunds, less a \$50 processing fee, will be granted if requested at least two weeks prior to the course. UC Davis Extension reserves the right to discontinue, postpone or combine classes and to change instructors. If a course is canceled or rescheduled, you may request an official transfer to another course or a refund. Every reasonable effort will be made to notify enrollees of any changes or cancellations.

Tax deductibility of education expenses

Expenses of education — including registration fees, travel, meals and lodging — may be deductible if they maintain or improve professional skills or meet the express requirements of an individual's employer.

Since 1991 — as part of the M.B.A. curriculum of the Office International de la Vigne et du Vin (OIV) — UC Davis Extension and the Department of Viticulture and Enology at UC Davis have coordinated a three-week program on the economics of producing and marketing grapes and wine in the United States. The program is open to members of the American wine and grape industry. It represents a unique opportunity to study the structure of the California wine and grape industry, how wine is marketed and brands are established, and the profitability of grape growing and winemaking.

The program can be taken as a whole, by the week or by the day. Since the course follows a logical development, it is strongly recommended that participants make every effort to attend the entire program. Organizations may register for the entire program or per week, thus enjoying a reduced price by sending different employees to different days, although some continuity will be lost.

The program faculty reads like a “Who’s Who” of the American wine industry, including winemakers, vineyardists, attorneys, accountants, wine marketers, distributors, retailers, leaders of trade associations, regulators and educators from the University of California. Representing more than 1,000 years of combined experience, 65 individuals share their knowledge and insights with conference participants.

Week 1

Demand, Production and Regulation

Monday, July 9

Industry Overview

- 8:30 a.m. **Organization and Introduction**
- 9:30 **The History of Wine in California**
Jim Lapsley, specialist, UC Davis Extension
- 10:30 **BREAK**
- 11:00 **The California Industry Today**
Jim Lapsley
- 12:00 p.m. **LUNCH**
- 1:30 **Wine Regions of California and the United States**
Jim Lapsley
- 2:30 **Definitions and Concepts in the Wine Industry**
Jim Lapsley
- 3:00 **BREAK**
- 3:30 **State of the Industry**
Vic Motto, senior partner, Global Wine Partners
- 4:00 **Discussion**

Tuesday, July 10

The American Market for Wine

- 8:30 a.m. **Grapes to Wine to Consumer: Legal Options**
Jim Lapsley
- 9:00 **The American Wine Consumer**
Richard Boone, principal, Solomon Wine Company; consumer research specialist, MKF Research
- 10:30 **BREAK**
- 11:00 **Wine Sales Trends in the United States**
Barbara Insel, managing director, MKF Research
- 12:00 p.m. **LUNCH**
- 1:30 **The Wine Market Council - Expanding the Market**
John Gillespie, executive director, The Wine Market Council
- 2:30 **Identifying Market Segments**
Jane Robichaud, vice-president for global business, Tragon Corp.
- 3:30 **BREAK**
- 4:00 **The U.S. as a Series of Markets**
Jim Lapsley

Wednesday, July 11

Industry Operation and Production Strategies

- 8:30 a.m. **Review Session**
Jim Lapsley
- 9:00 **Cost of Production, Volume and Management Implications**
Matt Franklin, principal, Demeter Group
- 10:00 **BREAK**
- 10:30 **Producing Wine for Specific Price Points**
Ed Moody, winemaker, Bronco Wine Company
- 12:00 p.m. **LUNCH**
- 1:30 **The Bulk Wine Market**
Steve Fredricks, director of client relations, Turrentine Wine Brokerage
- 2:15 **Custom Crush Options**
Tary Salinger, principal, Salinger Associates
- 3:00 **BREAK**
- 3:30 **Making Wine as a Negotiant**
TBA

Thursday, July 12

Regulation of Production and Marketing

- 8:30 a.m. **Philosophies of Regulation**
Richard Mendelson, attorney, Dickenson, Peatman and Fogarty
- 9:30 **Regulation of Production and Product Integrity**
Doreen Marin, specialist, TTB
- 10:30 **BREAK**
- 11:00 **Legal Requirements for Wine Labeling**
Jim Seff, attorney, Pillsbury Winthrop Shaw Pittman, LLP
- 12:00 p.m. **LUNCH**
- 1:30 **Intellectual Property and Trademarks in the Wine Industry**
Robert Burlingame, attorney, Pillsbury Winthrop Shaw Pittman, LLP
- 2:30 **Health and Safety Compliance**
Wendell Lee, attorney, The Wine Institute
- 3:30 **BREAK**
- 4:00 **State Regulatory Barriers and the Implication for Marketing**
Jim Lapsley

Friday, July 13

Tour of Northern San Joaquin Valley

Week 2

Marketing and Sales

Monday, July 16

Brand Establishment

- 8:30 a.m. **Review Session**
Jim Lapsley
- 9:00 **Identifying Niches and Developing Strategies**
Tom Shelton, president and CEO, Joseph Phelps Vineyards
- 9:50 **The Art of Story Telling**
Bruce Rector, winemaker, Bruce Rector Winery
- 10:40 **BREAK**
- 11:10 **Launching New Brands**
Ron Janowczyk, vice president of sales, the Purple Wine Company
- 12:00 p.m. **LUNCH**
- 1:30 **Label and Package Design**
Michael Osborne, owner, Michael Osborne Design
- 3:00 **BREAK**
- 3:30 **Appellation Marketing: Promoting the Napa Valley**
Kim Wiss, marketing director, The Napa Valley Vintners

Tuesday, July 17

Brand Management

- 8:30 a.m. **Pricing and Programming for Net and Sale**
Jim Cahill, vice president of sales for North America, SupremeCorq
- 10:00 **BREAK**
- 10:30 **Integrating Brand Management Tools**
Leslie Litwak, senior vice president, Icon Estates
- 12:00 p.m. **LUNCH**
- 1:30 **Positioning Ultra Premiums**
Jean Arnold, president, Hanzell Vineyards
Armen Khachaturian, national sales manager, Hanzell Vineyards
- 3:00 **BREAK**
- 3:30 **Synergy and Brand Identity**
Peter Rubens, owner, Bearflag Marketing

Wednesday, July 18

Channels of Distribution

- 8:30 a.m. **Review Session and Role of Distributors**
Jim Lapsley
- 9:30 **The Role of Brokers and Importers**
Kimberly Brown, owner, Gable Lane Wines
- 10:30 **BREAK**
- 11:00 **Legal Direct Selling in the U.S.**
Katie Schumaker, president, New Vine Logistics
- 12:00 p.m. **LUNCH**
- 1:30 **Distributing Fine Wine: Chambers and Chambers**
Bruno Walker, Northern California sales manager, Chambers and Chambers
- 3:00 **BREAK**
- 3:30 **Wine in Restaurants: How a Producer Can Become a Partner**
Katie Doherty, beverage manager, Tavistock Restaurants, LLC
Thad Lyman, executive chef, Napa Valley Grille

Thursday, July 19

Retail Sales

- 8:30 a.m. **Trends in Supermarket Retailing**
Bob Reynolds, principal, Reynolds Associates
- 9:50 **Selling Fine Wine in Supermarkets: The Nugget**
Hank Beal, director of the nectar, Nugget Markets
- 10:40 **BREAK**
- 11:10 **Selling Fine Wine at Retail**
Peter Marks, M.W., director of wine, Copia
- 12:00 p.m. **LUNCH**
- 1:30 **Retail Account Management**
Rob Celsi, vice president of strategic brand development, Trinchero Family Estates
- 3:00 **BREAK**
- 3:30 **Direct to the Consumer**
Craig Root, principal, Craig Root & Associates

Friday, July 20

Tour Retail Outlets

Week 3

Profitability and Economics

Monday, July 23

Grape Supply and Economics of Production

- 8:30 a.m. **Review Session**
Jim Lapsley
- 9:00 **Regional Opportunities: An Investor Looks at California Vineyards**
Gordon Axton, principal, Axton Wine Group
- 10:00 **BREAK**
- 10:30 **Vineyard Economics**
Mike Fisher, partner, Global Wine Partners
- 12:00 p.m. **LUNCH**
- 1:30 **Factors Determining Profitability: A Grower's Perspective on Two Regions**
Mike Vail, viticulture consultant
- 2:15 **Selling Wine Grapes: Pricing and Contracts**
Glenn Proctor, broker, Joseph Ciatti Co.
- 3:00 **BREAK**
- 3:30 **Panel: The Future of Viticulture in California**
Steve Shafer, president, Shafer Ranch, Madera County
Rich Smith, president, Valley Farm Management, Monterey County
Volker Eisele, partner, V & L Eisele Vineyards, Napa County

Tuesday, July 24

Winery Costs and Profitability

- 8:30 a.m. **Review Session**
Jim Lapsley
- 9:20 **The Capital Intensive Nature of Wineries: Building and Financing Inventory**
Greg Scott, CPA and partner, PricewaterhouseCoopers
- 10:30 **BREAK**
- 11:00 **Size, Distribution and Market Niche: How Do They Affect Profitability?**
Robert Morris, MKF/Frank Rimerman + Co.
- 12:00 p.m. **LUNCH BREAK**
- 1:30 **A Banker's View: Financing Premium Wineries**
Dan Aguilar, Sonoma market manager, Silicon Valley Bank
- 2:30 **BREAK**

- 3:00 **How Much Does it Cost to Start a Small Winery?**
Cary Gott, owner, The Gott Group

Wednesday, July 25

Winery Profiles

- 8:30 a.m. **Havens Wine Cellars**
Michael Havens, general partner and winegrower
- 10:00 **BREAK**
- 10:30 **Viader Vineyards**
Delia Viader, owner, president and winemaker
- 12:00 p.m. **LUNCH**
- 1:30 **Domaine Carneros**
Eileen Crane, president and winemaker
- 3:00 **BREAK**
- 3:30 **Calera Wine Company**
Josh Jensen, owner, president and winemaker

Thursday, July 26

Tour of Profiled Wineries

Friday, July 27

Summary of Program

- 8:30 a.m. **How Can We Expand Wine Consumption?**
Tim Hanni, M.W. and president, Wine Quest
- 10:00 **BREAK**
- 10:30 **Three Week Review and Summary**
Jim Lapsley
- 12:00 p.m. **Conclusion**

UC Davis Extension offers wine courses in a variety of topics including accounting, compliance, marketing and production. For more information or to request a brochure, please call (800) 752-0881 or visit our Web site.
www.extension.ucdavis.edu/winemaking

Enroll  **online**
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ENROLLING IS EASY!

BY MAIL complete this form and send it to the Registration Office, UC Davis Extension, University of California, 1333 Research Park Drive, Davis, CA 95618-4852.

BY PHONE call toll free (800) 752-0881. From Davis or Woodland call 757-8777. Please have your Visa, MasterCard, American Express or Discover account number handy.

BY FAX to (530) 757-8558. Be sure to include a complete enrollment form along with credit card information or a company purchase order.
IN PERSON at our Registration Office, 8:30 a.m.-4:30 p.m., 1333 Research Park Drive, Davis.
ONLINE at www.extension.ucdavis.edu.

- 1. Yes!** Please enroll me in **OIV Wine Marketing Short Course** / July 9-27 / \$2,700 / 071VIT200 Enrollment by week / \$1,100 per week (*tours not included*)
- First Week / **Demand, Production and Regulation** / July 9-12 / 071VIT201.
 - Second Week / **Marketing and Sales** / July 16-19 / 071VIT202
 - Third Week / **Profitability and Economics** / July 23-25 / 071VIT203.
- Enrollment by the day / \$300 per day
- July 09 / **Industry Overview** / 071VIT204
 - July 10 / **The American Market for Wine** / 071VIT205
 - July 11 / **Industry Operation and Production Strategies** / 071VIT206
 - July 12 / **Regulation of Production and Marketing** / 071VIT207
 - July 16 / **Brand Establishment** / 071VIT208
 - July 17 / **Brand Management** / 071VIT209
 - July 18 / **Channels of Distribution** / 071VIT210
 - July 19 / **Retail Sales** / 071VIT211
 - July 23 / **Grape Supply and Economics of Production** / 071VIT212
 - July 24 / **Winery Costs and Profitability** / 071VIT213
 - July 25 / **Winery Profiles** / 071VIT214

2. Customer information: Mr. Mrs. Ms. _____ Name

Current position/job title _____ **Social Security number*** _____

IMPORTANT: Where would you like to receive mail? work home (Please fill in all blanks below)

Address _____ City _____ State _____ Zip _____

Employer name _____
 (_____) _____

Daytime telephone _____ Evening telephone _____

Email _____ If you do not wish to receive periodic email about UC Davis Extension courses and programs in your area of interest, please check this box .

Please add extension@ucdavis.edu to your address book or safe list to ensure that our email messages are delivered properly.

*UC Davis Extension is required by federal law to report your Social Security Number (SSN) and other pertinent information to the Internal Revenue Service pursuant to the reporting requirements imposed by the Taxpayer Relief Act of 1997. UC Davis Extension also will use the SSN you provide to verify your identity. SSN disclosure is mandatory. This notification is provided to you as required by the Federal Privacy Act of 1974.

3. Payment information:

- Enclosed is a check payable to UC Regents.
- Enclosed is a company purchase order (a complete enrollment form, or all information requested on the enrollment form, must accompany your purchase order).
- Please charge **Visa/MasterCard/American Express/Discover:**

Account number _____ Expires _____

Name of cardholder _____ Authorized signature _____

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Credit card verification number: _____ The CCV is the last three digits of the number printed on the back of your credit card (for American Express it is the last four digits of the number printed on the front of the card).

4. Important! Key code: _____

For efficient processing of your enrollment, please fill in this code as it appears on your mailing label, whether or not it is addressed to you. If you enroll by phone, please be prepared to provide this code to your customer service representative. Also include it on all purchase orders.

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