



MARQ

WINE GROUP

Presentation as of Q1 2022

Introduction

- Proven 14-year track-record of building sustainable US market growth
- National reach with current work in the top 20 metro markets
- Combined 49-years of US wine industry knowledge and experience
- Trade/media current contact list of 16,000+
- East and west coast representation with primary partner based in Los Angeles
- New York, Miami, Chicago and San Francisco media office with national reach
- Strategic partnerships with the most influential sommeliers in each key market
- Research and data driven approach
- Demonstrated success of growing sustainable long-term growth



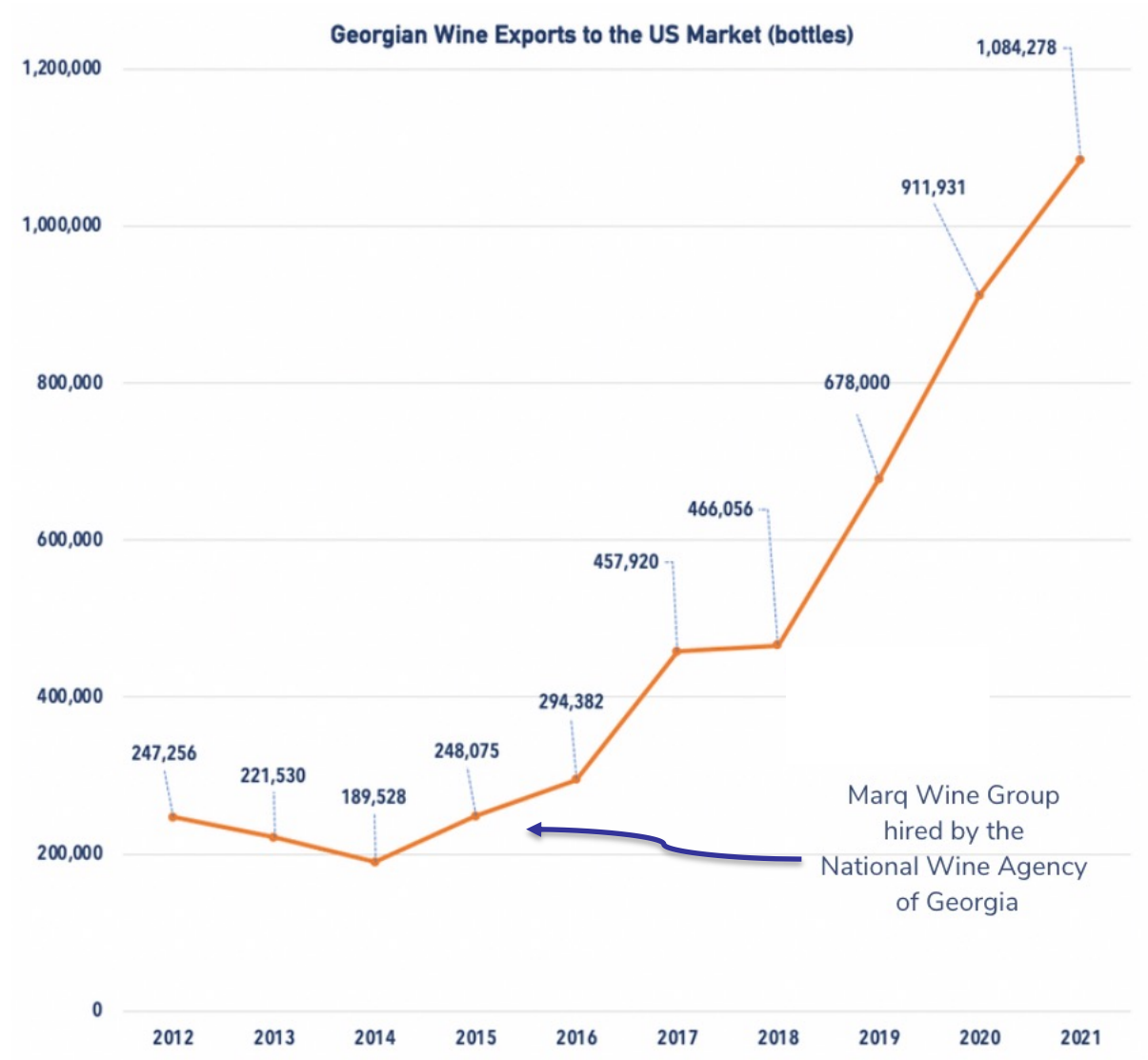
Strategy Results Overview

Case Study: Wines of Georgia, Department of Agriculture, country of Georgia

- In 2015 we were asked to create a sustainable growth strategy to increase exports to 1 million bottles from 250k bottles. We estimated with the maximum organic growth according to Nielsen, it would take seven years. It was done in six years.
- 2021 Exports: **1,084,278 bottles**
- This represents a 19% growth over 2020.
- In 2015, there were 37 wineries in the US. Six years later there are over 200 with presence in the US market.
- 6 years of **year-over-year average growth of 29%** (growth over 19% is considered "fast growth").
- Achieved objective one year early

Strategy Results: Volume

Case Study: Wines of Georgia



Strategy Results Overview

Case Study: Wines of Provence

- Leading strategy and execution from 2008 to 2016
- **12 years of double-digit export sales growth consistently holding strong** with **49%** on volume and **43%** on value from December 2015 to December 2016.
- 2008: 35 Provence wineries were exporting to the US
- By 2016, that number had grown to more than 180+
- ACTIVE Trade contacts grew from 2,679 in 2011 to 10,000+ in 2016
- Wine Enthusiast nominee for “Wine Region of the Year” in 2011 and 2016

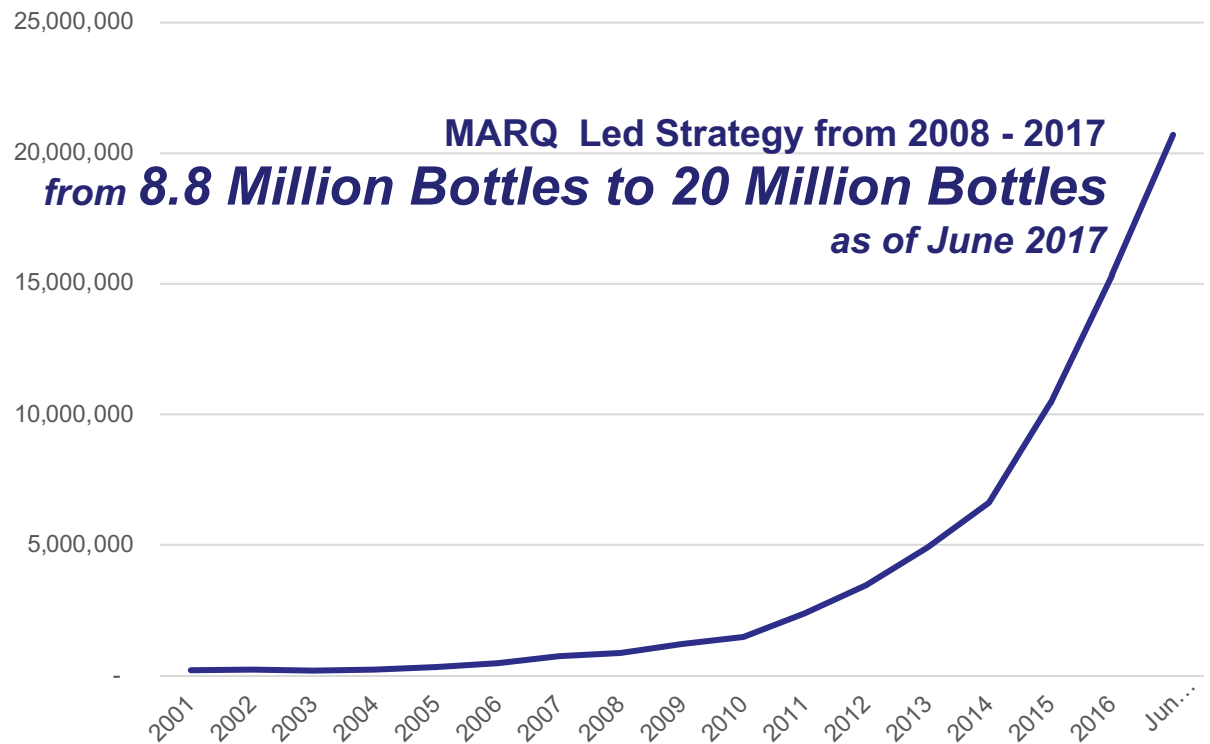
“Growth of the dry rosé category was driven by the Provence region with the US strategy led Marq Wine Group. The growth of the exports to the US from Provence represents the most successful sustainable category growth in the last 20 years.”

Head of the Nielsen’s Wine and Food Research Division

Strategy Results: Volume

Case Study: Wines of Provence

Volume of Rosè Wine Exports from Provence 2001 - June 2017



Source: CIVP Exports based on French customs report

Strategy Results: Value

Case Study: Wines of Provence

Value of Rosé Wine Exports to the US Market 2001 - June 2017



Source: CIVP Exports based on French customs report

Case Study: Media Only

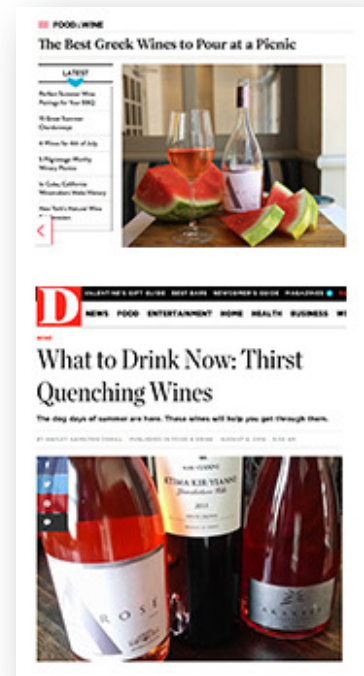
Case Study: Alpha and Kir-yianni Estates, Amydeon, Greece


Media relations for Alpha and Kir-Yianni Estates from the northern Greek region of Amydeon, which specializes in Xinomavro-based wines

- 21 media placements from 40 sets of samples (over 50% response rate)
- Total media impressions: **227,277,843**
- Cost per 1,000 impressions: **\$0.08** (Compare: Diageo **\$6.00 per 1,000 impressions**)
- Key placements: **Forbes, Food & Wine, Food Republic, USA Today**

"Marq Consulting Group's media team were able to generate strong, focused press coverage for our wines which gave our brand greater visibility in the very competitive US market, and ultimately helping to drive sales."

Angelos Iatridis, Proprietor and Winemaker, Alpha Estate





ACTIVITIES TO ACHIEVE MARKET GROWTH IN THE US MARKET

SUSTAINABLE GROWTH IS ACHIEVED THROUGH A SERIES OF INTEGRATED ACTIVITIES THAT WORK TOGETHER TO BUILD SUSTAINED GROWTH

- **MARKET ANALYSIS**
- **US TRADE BUREAU (SAMPLING, CONNECTING, B2B MEETINGS, CONSOLIDATED SHIPPING PROGRAMS)**
- **US MEDIA BUREAU (EARNED MEDIA)**
- **TRADE AND MEDIA TASTINGS/EVENTS/TRIPS**
- **WEBSITE PRESENCE: INFORMATION CENTER**
- **SOCIAL MEDIA ENGAGEMENT**
- **CONSUMER EVENTS**
- **RESTAURANT AND RETAIL PROGRAMMING**
- **SUPPORTED BY INTEGRATED ADVERTISING SUPPORT PROGRAM**
- **RESEARCH AND MEASUREMENT**

U.S. TRADE BUREAU

- Initial market analysis
- Assess current market position/extent of distribution/price positioning
- Establish growth strategy
- Proactive outreach to the trade of over 16,000 trade contacts
- All contacts developed internally over 10 years and kept current with every conversation
- Presenting producers who are not yet in the market to importers
- Introducing the top sommeliers in the country to develop market demand
- Engage with the major on-line communities wine.com, amazon, vivino, etc.
- Build partnership programs with the Guild of Sommeliers
- Trade briefings to the 16,000 trade contacts
- Monthly reporting and ongoing adjustments to strategy in the market depending on market demand



“Growth of the dry rosé category following Marq Consulting’s leadership of Provence is the most successful sustainable category growth in the last 20 years.”

- Head of the Nielsen’s Wine and Food Research Division

WE HAVE A WINE IMPORT COMPANY

MARQ launched created an import company in 2017 due in response to the increasing need to provide logistics support to MARQ clients. We provide both warehousing and logistics support to regions in order to facilitate events and follow-up sampling.



In 2019 we created a consolidated shipping program for new importers in order to lower the barrier of entry for smaller producers and import companies and allow them to begin trade US markets.

WINE IMPORTER AS A TOOL FOR OUR CLIENTS

Other services provided for **INDIVIDUAL WINERIES** include:

- **MARKET STUDY**
- **IMPORTER CONNECTION**
- **RATINGS SUBMISSION FOR WINE SPECTATOR/ENTHUSIAST**
IMPORTER OF RECORD (WAREHOUSING AND SAMPLING)
- **WEBSITE REDEVELOPMENT**
- **SOCIAL MEDIA INTEGRATED STRATEGY**
- **HOURLY ADVISORY SERVICES FOR BUILDING YOUR TARGET**
IMPORTER LIST
- **MEDIA RELATIONS PROGRAM**



Stone and Nichols can also act as an producers “importer of record”, process advance ship notices, conduct FDA registration and offer other compliance, warehousing and services. Separate fees apply for these customized services.

RESULTS-DRIVEN Traditional Media Relations

New York City- Based Media Team

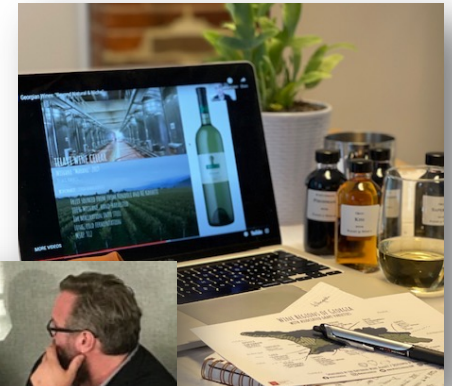
- Guaranteed coverage through a comprehensive press bureau
- Target most appropriate and influential wine, lifestyle, food and travel writers for trade and consumer audiences
- Promote in-market activities including winemaker dinners, retail tastings
- Organize interviews with media when principals travel to the US
- Pitch and ship 36 to 48 samples to top writers in specific markets.
- Identify opportunities by monitoring key editorial calendars
- Monthly reporting



TRADE EVENTS & TRADE TRIPS/ENGAGEMENT

NATIONAL REACH INTO TOP MARKETS

- Create city 3-5 year city market rotation
- Select city rotation based on key distribution and regulatory environments
- Selection, negotiation, set-up and all operations and logistics
- Create customized invitation lists per client needs
- Structure presentation to current market knowledge and understanding of region
- Hire the top, most respected Sommeliers/Presenters per market
- Create all promotional items, invites, maps, tasting booklets, tasting mats, etc.
- Develop feedback forms
- Conduct follow-up in regular intervals



WEBSITE – U.S. ENGAGEMENT

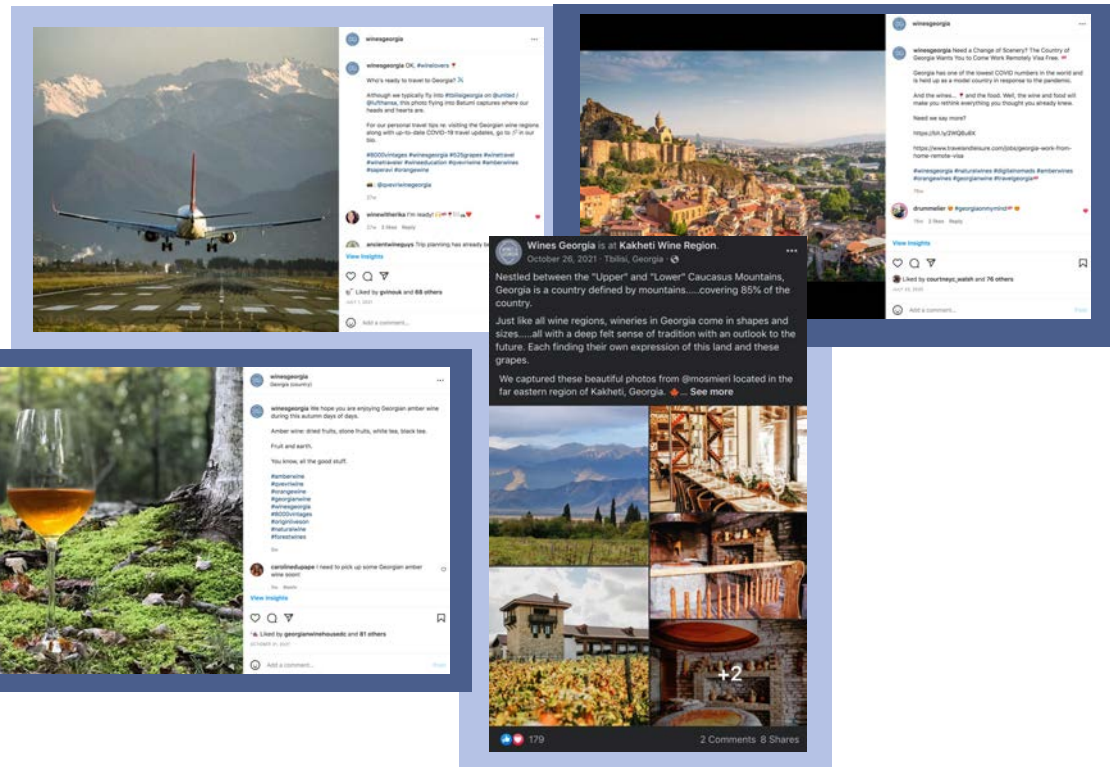
NATIONAL REACH

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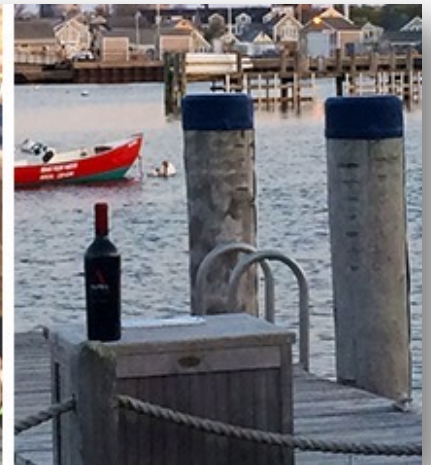
DIGITAL & SOCIAL MEDIA MANAGEMENT

- Analysis of current social media channels and update within global initiative
- Integration within full marketing campaign
- Email marketing (newsletters) to 8000+ trade/media network across the US
- Proactive outreach to top trade, media and US influencers to gain audience
- Development of social network advertising program to enhance results
- Campaign Analytics



CONSUMER PROGRAMMING

- Winemaker dinners
- Restaurant Programs with the top sommeliers
- Retail integrated marketing in-store tastings
- Strategic positioning and programming at some of the top food and wine festivals
- Focused programming at the James Beard Awards
- All marketing and social media channel integration



RESEARCH AND MEASUREMENT

- Media Analytics
- Social Media Analytics
- Website Analytics
- Conduct ½ interviews with all importers
- Conduct end-of-year interviews (November) with retailers/sommeliers, media
- If additional funding for the future is available, it's important to begin working on primary research projects: Nielsen, Wine Market Trade Council, wine.com, etc.



JULIE PETERSON (Washington DC based)

Julie has more than 25 years of international business development and marketing experience, working with organizations including the U.S. Agency for International Development (USAID) the World Bank, among others. **For the last 14 years she focused on helping wine regions achieve record U.S. growth.** She currently holds leadership positions in the Washington International Trade Association, the Wine Market Council, the French American Chamber of Commerce, and Women in International Trade (Member of the Year in 2013-14); she is also a member of the invitation-only Les Dames d'Escoffier International.

Julie has a degree in business, with minors in economics and political studies, from Dordt University, which named her a distinguished alumna in 2003.



TAYLOR PARSONS

(Los Angeles, CA based)

One of the most influential sommeliers in the US market, Taylor began his career as sommelier/Wine Director stints at Mark Peel's landmark Campanile Restaurant and Wolfgang Puck's Spago Beverly Hills preceded the move to Nancy Silverton, Joe Bastianich and Mario Batali's Mozza restaurants. He was the Beverage Director for the Mozza Group from 2010-2013, overseeing: Osteria Mozza, Pizzeria Mozza and Spacca Los Angeles, and Pizzeria Mozza in Newport Beach.

In 2013, he became Chef Sommelier and Beverage Director for the opening of Manzke's French-centric République restaurant. He took over as General Manager in September 2014. That same year, he received the **'Rising Star Sommelier'** Award from StarChefs, and in 2015 was named one of seven **'Sommeliers of the Year'** by Food & Wine Magazine as well as **'Best Sommelier'** by the LA Weekly.



CHRISTINE DEUSSEN (New York/Miami based)

Originally from Michigan, Christine attended Barnard College of Columbia University (New York), from which she has a degree in Classics (Greek); she also spent a semester at Université de Paris. Born to European parents, wine was part of every meal. High school bar and restaurant jobs gave way to Christine's first job as an ancient Greek coin appraiser for Christie's, but she soon migrated back to wine, working in marketing for Veuve Clicquot, PR within Havas/EURO RSCG, and finally opening her own company in 2002. Deussen clients are regularly included in top lists (e.g., Impact Magazine's "Power 100" and "Hot Prospects"; IWSR's "Elite Brands"; etc.) and lifestyle coverage ranges from The TODAY Show to The Wall Street Journal, Wine Spectator, Food & Wine, VinePair, Robb Report, etc. Languages include French, intermediate Italian, and beginning Spanish.





What Makes Us Different? Why Are We Able to Achieve Year-Over-Year Growth For Wine Regions?

1. Relationships with sustained engagement. We have built a database of 16,000 wine trade contacts which we have systematically remained in contact with since 2008. We track every conversation with multiple points of contact per each client.
2. We created a system that holds together all activities and offers multiple points of engagement averaging every 60 days per contact.
3. Persistent, consistent contact creates momentum