



The Future Vintages of a Cultural Commodity in China

Silver Heights Winery Leader, Emma Gao

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This case is intended to be used as the basis of class discussion rather than to illustrate either effective or ineffective handling of a management situation. All of the material in this case study is based on secondary data from published sources. The authors have not interviewed the business leaders in this case.

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Abstract

This case study examines the outlook of China's wine market from 2021 to 2022 with focus on the operations of Silver Heights Winery and its leader, Emma Gao. Due to Western influence and an expanding middle class, China has seen a recent spike in alcohol consumption, particularly with the luxury commodity of wine. Currently, China is one of the world's leading populations in total wine drunk per year, and winemakers from across the world rely heavily on these Asian consumer markets to maintain steady profits. In addition, the Chinese government is eager to become one of the world's largest producers of wine to take a proverbial sip of these potential profits. The kicker is that in recent years, Chinese consumers seemed less likely to purchase a domestic commodity than their international counterparts, despite China's growing popularity among wine connoisseurs. This case poses the question of whether Chinese winemakers should attempt to bridge the culture gap between Chinese wine labels and foreign audiences or if it is better to diagnose the issues that would allow them to tap the keg of a huge potential domestic consumer base in China.

Learning Outcomes

By the end of this case study, students should be able to:

- Appraise the need for continued focus on cabernet sauvignon or product diversification.
- Identify the competitors of Silver Heights Winery and how the organization can leverage its competitive advantage.
- Identify the roles of the leadership of Silver Heights in preparing for global climate change.
- Assess Emma Gao's global mindset competencies and offer suggestions for how she can improve.
- Recommend to the leaders of Silver Heights Winery whether to focus their operations on domestic Chinese markets or international markets.

The Leadership Challenge¹

It is a crisp morning in late spring. Emma Gao inhales deeply while maintaining calm composure as her arms gracefully move through the air. Most mornings, this Chinese oenologist and chief winemaker of the Silver Heights Winery can practice the artful movements of Tai Chi backdropped by the illustrious vines of her family's vineyard deep within China's Ningxia region. After finishing her routine, Gao strolls through her family's vines while pondering the accomplishments of her family's business over the past fifteen years. In the distance, she sees her father, the company's other founder and leader, driving through the fields towards the impressive chateau on his tractor. The two are set to meet later in the day to discuss the company's future

¹The authors have not interviewed the business leaders in this case. The authors used creative license to write a protagonist story to help the reader imagine leader thought processes and feelings.



business strategy. Emma ponders how to approach the conference best, for she wonders if her father will be open to hearing a new corporate strategy.

Emma Gao entered the competitive wine market as a true entrepreneur, knowing that the road would be extremely difficult. As she said in a 2018 interview with *Vogue* magazine, “Wine is not really in [China’s] culture—we make tea, not wine”(Vogue, 2018). After starting Silver Heights Winery, Gao was not only starting a new business, but she was also going to break cultural and gender barriers within a well-established global industry. An industry that has spanned centuries and oceans and one that has tested the very integrity of governments and consumers.

After overcoming a lack of profits for the organization's first several years, Silver Heights has become one of the most renowned brands of China’s newly emerging wine producers. Ten years ago, the idea of a prominent Chinese wine label did not seem feasible. Many industry experts turned their noses up to many Chinese wines, and domestic buyers simply did not trust China could offer a quality product. Wine has always been a symbol of European culture, and many traditionalists in the wine industry were more focused on the litany of problems facing European vineyards, like climate change, saturated markets, or untrustworthy supply chains. In addition to these problems, Gao must ponder whether Chinese consumers will continue to prefer foreign exports over domestic wines. If the Chinese should determine that this is a viable option, how will Gao continue to grow the business, and what markets should the business be targeting? Gao expects to discuss the potential international strategies with her father later that day, and her recommendations may surprise some.

The Historic and Troubled Global Wine Industry

Wine, simply stated, is an alcoholic beverage crafted from the fermented juice of grapes, but to many connoisseurs, wine is synonymous with culture, prosperity, grandeur, and love. To investors, wine is a luxury commodity that represents either a potential gold mine or an investment that may leave a bad taste in the mouth. Wealthy citizens can even invest their savings in the London International Vintners Exchange to diversify their portfolios. Today, however, premium wineries are fighting for survival against many factors, including but not limited to climate change; an overly saturated market including new contenders in nontraditional wine countries; cheap alternatives from mass producers; and substitute products like beer, spirits, and other alcoholic alternatives. Global winemakers are struggling with many of these problems, in addition to the fact that before the recent pandemic, wine sales had been steadily declining year-on-year. Wine itself is synonymous with the culture of Europe. However, this cultural connection from these ancient winemakers may be overshadowed by the plethora of issues facing an industry that may be dying on the vine. (McDonald, 2020)

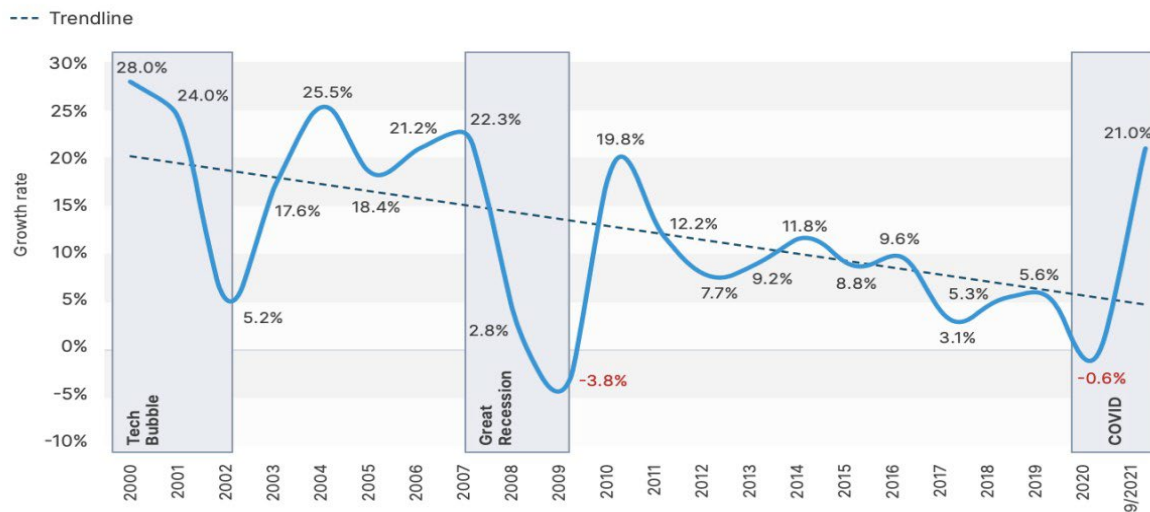
Today, the outlook of wine remains uncertain. Before the onset of the pandemic, wine sales were steadily declining year over year; see Figure 1A. However, data shows that sales have skyrocketed to levels not seen since the Great Recession of 2008. As the world and businesses continue to reopen, it seems that the wine industry will continue to flourish. Nevertheless, what is the driving force behind this increase? While it is no secret that global alcohol consumption rose during the



pandemic, data also indicates that most wine consumers are of older generations (Figure 1B). Will younger generations continue to imbibe adult grape juice? Can premium boutique wineries rely on this new era of customers? Wineries will need to assess where the potential markets of growing younger consumers are. Seemingly, it all points to China as available data shows China's younger population is starting to gain a palette for luxury wine products. (McMillan, n.d)

Figure 1A: Year-over-year trend of wine consumption showing a tremendous spike in global wine consumption at the start of the 2020 COVID pandemic.

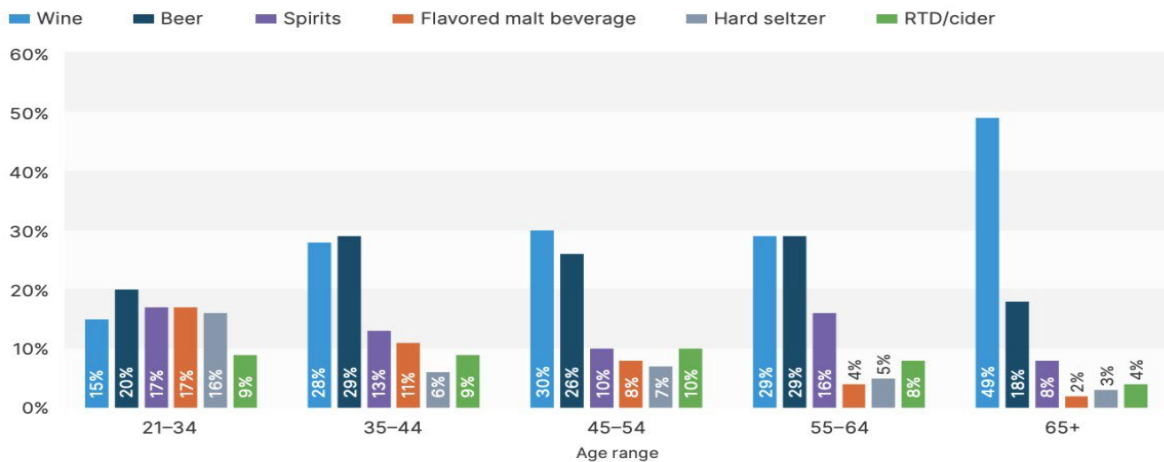
Figure 21: **Sales growth rate for premium wineries**



Source: SVB Peer Group Database

Figure 1B: Wine consumption by age demographic with the 65+ demographic being the highest consumer of wine (McMillan, n.d.).

Figure 7: **What would you bring to share at a party?**



Source: The Harris Poll. Survey conducted online by The Harris Poll on behalf of the Wine Executive Exchange, November 9-11, 2021, among 1,949 US adults ages 21+. "RTD" means ready to drink.



Leaders' Background

Emma Gao and her father founded Silver Heights Winery in 2007. Like most other wineries, Silver Heights continues to be run as a family-owned business today. The operation is considered as a “medium” size winery. The company produces around 200,000 bottles annually and exports to 15 countries plus its domestic markets. (Sasseen, 2015).

Before the winery was established, Gao's father farmed the same property for table grapes. Together, the two family members had the necessary skills and experience to develop a vineyard capable of global sales and able to compete against any other boutique operation.

Emma Gao, born in China, moved to the renowned Bordeaux region of France in 1999 to study the artful science of oenology (the study of wines) at the esteemed University of Bordeaux. Subsequently, she spent time working at Château Calon-Ségur, a winery in the famed Bordeaux wine region of France. In 2004, she moved back to China, where she continued her career with wine by working at a winery in Xinjiang and working in wine sales in Shanghai. Then, in 2007, with her impressive background and her father's grape farm already established, it seemed quite practical that Emma would then start her vineyard. Emma was named chief winemaker of the company Silver Heights Winery (Vogue, 2018). Figures 2A, B, and C depict Emma Gao, her work, and her business.

Figure 2A



Figure 2B



Figure 2C



Figure 2A. Emma Gao observes a freshly poured glass of her family's created wine.

Figure 2B. A Silver Heights Winery's Cabernet Sauvignon bottle, 'The Summit'.

Figure 2C. Silver Heights Winery nestled at the base of the Helan Mountains in the Ningxia Region of China.

Location & Climate

When it comes to producing any food product, location matters. More specifically, the regional climate and the geological landscape are very important factors in determining the success of such an operation. This is why the United States' primary wine industry is in California. Wine experts (sommeliers) will defend that the region where a grape is grown has significant impact on the



final product. Typically, vineyards need to be positioned in areas that are not too tropical, arid, or frigid. Most suitable climates are between 30° to 50° latitude. Silver Heights is in the Ningxia region of China, approximately 38° N (Wu, 2020).

The winery is situated on the eastern slopes of Mount Helan, relatively close to the Mongolian border and approximately 600 miles from Beijing. The area resembles a desert climate at an altitude of 1200 meters. The annual average rainfall accumulates to approximately 7 to 28 inches. Due to the arid conditions inherent in the region, the winery is almost entirely dependent on water from the nearby Yellow River. The region of Ningxia is abundant in mineral resources, which, as a result, bleeds into the river. Gao has stated that the mineral-rich water helps improve the quality of the grapes and the wine. Unfortunately, as is the case with most major rivers today, the Yellow River is currently facing ecological problems and seemingly drying up more with each passing year (Wu, 2020).

The climate in Ningxia varies quite dramatically. In the summertime, temperatures can rise as high as 100 F and drop as low as -20 F in the winter season. Due to the harsh winter conditions, Silver Heights does something unique in the wine industry. After the autumn harvest, the company buries its vines in a thick layer of dirt every November. Figures 3A, B, and C show region the climate in this region.

Other wine regions do not encounter such drastic winter conditions, and as a result, Gao and her family must bury the vines, so they do not freeze due to the very low temperatures. Burying the vines provides a physical layer of protection against frost, which would otherwise kill the entire crop. The process is as follows: the vines are irrigated and then laid on the ground, which are then covered in dirt by a tractor. As one can imagine, this is a very laborious, delicate, and time-consuming process. Harvests may have to be cut short if cold conditions are expected earlier in the season. Gao indicates that the vineyard loses approximately 5% of the total vines yearly due to burying. The surviving produce may be affected by various factors at the end, making them unusable in the upcoming season. This process may result in the loss of significant percentage of the crop yearly, and even potential annual revenue, as the company cannot grow its grapes throughout the year as other locations. During the winter months, the entire property looks barren, which is not exactly good for tourism as the Chinese government would like to increase revenue (Du Vin, 2012).



Figure 3A



Figure 3B



Figure 3C



Figure 3A:Map showing the location of the Ningxia region of China (red).

Figure 3B. Image of the Helan Mountains showing the arid landscape.

Figure 3C. The Yellow River, the main source of water for grapes at Silver Heights Winery

Ningxia is one of several regions in China dedicated to wine production: however, the Helan Mountains' eastern foothills have a diverse variety of grapes at par with that of Bordeaux or Napa Valley in the U.S. and account for most of the domestic wine production. The main reason Ningxia is becoming the focal point is mainly because of the available land. As previously stated, China's government wishes to make the country one of the world's largest producers of wine. By 2035, Ningxia's area aims to produce 600 million bottles worth 20 billion yuan (\$3.12 billion), according to a plan the central government approved in May 2021. According to French sources, Bordeaux produced 522 million bottles worth 3.5 billion euros (\$4.16 billion) in 2020. (Cheng, 2021)

Ningxia is an arid desert geography. Due to the availability of space and abundant sunshine in the summer, the Chinese government allocated the land for wine production. The region has boomed in construction and jobs since then. Another motivating factor is due to one of the cultural aspects of wine, the experiential factor. In addition to bottles produced, China wants to make Ningxia a tourist destination for wine tours and in-person tastings to drive more revenue growth. Many of Ningxia's new "chateaus" model themselves to traditional European styles. Figure 4A shows an image of Chateau Changyu Moser in Ningxia. Figures 4B and 4C show the new tasting rooms designed for future tourists. (Kaye, 2021).



Figure 4A



Figure 4B



Figure 4C



Figure 4A. Chateau Changy Moser in Ningxia modeled after a typical French chateau. **Figure 4B/C.** Images from a winery in Yinchuan Ningxia Autonomous region in 2015.

Ningxia still comes with significant challenges. In Ningxia, there is a drier climate, which means young plantations need irrigation. The vines are buried every winter to survive the frigid temperatures — which can drop to minus 27 C (-16.6 F) — and unburied in spring. It is an expensive and risky process, killing between 3 to 5% of the total vines yearly. This issue is escalating due to the litany of issues that come with climate change: a decrease in the ozone layer, pollution, and the surface of the Earth heating up drastically over the years. With increasing global temperatures, rivers like the Yellow River are facing ecological issues. If these continue, it is likely that production at wineries like Silver Heights may be negatively impacted (Cheng, 2021).

Product Offerings

Gao is a student of the Bordeaux region of France. As a result, her winery specializes in producing wines primarily seen in Bordeaux, such as Cabernet Sauvignon, Cabernet Franc, Chardonnay, and Riesling. Two of the red wines produced have been rated extremely high in competition. The company continues to be innovative, and they do offer seasonal special wines to appeal to new consumers that they advertise on their social media pages. As of now, it appears that the company will continue to focus its attention only on wines, specifically their Cabernet Sauvignon (Gattoni, 2020).

Labor Force

The Chinese government is extremely motivated to make its domestic wineries one of the world's largest wine producers today. To boost production, the Chinese government began a relocation program where Chinese Muslim minority groups, mostly the Uighurs and Kazakh groups, were relocated to areas where wineries were abundant, specifically the Xinjiang and Ningxia regions of China. As a result, many wineries in these regions have a labor force primarily composed of those who were moved (Schillinger, 2019).

The labor force used to produce the wines comes from most minority Chinese Muslims. The issue here could be that according to the religious beliefs of these people, it is against them to consume or produce alcohol of any kind. Many of the native Muslims in China were relocated to Ningxia



with the sole purpose of having them work the fields of vineyards. As Ningxia continues to grow, there may be opportunities for these people to move away from the alcoholic production and work in other departments, perhaps more in line with their religious beliefs. (Schillinger, 2019)

Wine in China: A New Luxury Commodity

For many years, China’s wine consumption was considerably smaller than other global countries. As consumption continues to rise, the difficult shift comes from society’s perception of luxury wine. A study polled part of the Chinese population on where they believe luxury wine comes from. A vast majority selected France to be the origin of that wine, with China just barely sliding into tenth place. Figure 5A below shows the results of a study conducted by McKinsey that shows most Chinese consumers tend to favor. In addition, Figure 5B shows that more wine is consumed in China every year. As of April 2021, China ranked 6th in global wine consumption and tenth in production. The graph below is a few years old, so given the effect of the recent pandemic, this trend is likely to be even more positive in more recent years (McMillan, n.d.).

Figure 5A: China’s consumption preference

Foreign Palate

Wine is one of the goods that Chinese consumers prefer to source abroad

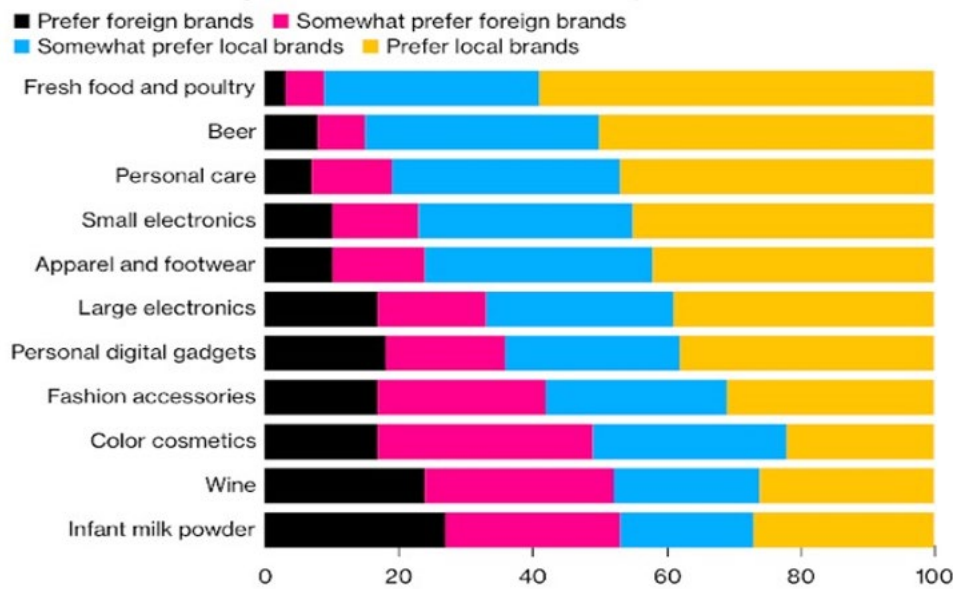
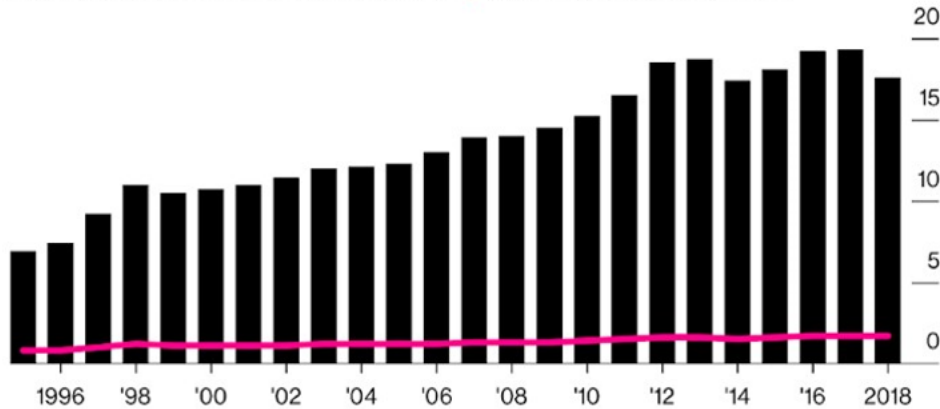


Figure 5B: Growing consumption of wine in China

China Loves Wine

Consumption is booming but there's still room to grow

■ Total consumption (millions of hectoliters) / Consumption per capita (liters)



The Pandemic’s Shift

The shift during the pandemic can be a difficult one to pinpoint due to the supplier inventory and distribution plan of wine before the pandemic, according to Janet Wang, the author of “The Chinese Wine Renaissance”. However, there was still a notable change in the consumption of luxury wine over the many months of the pandemic in China (McDonald, 2020). In the beginning of 2020, the global shifts created a chain reaction of a vast decrease in import volumes. Those volumes slumped upward of 32% in China just within the first half of 2020 alone. Australia played a large role in China’s imports of foreign wine. Throughout the changes in the pandemic, their once helpful neighbor, saw tariffs by the government of up to 212% to reflect an ongoing dispute between countries. Chinese producers saw this as an opportunity to push for their wine sales domestically while many parts of the world were shut down. This came from promotions and inquiries about Chinese wines and their industry. Capping the end of the pandemic, according to a Wine Intelligence survey in August, 54% of Chinese respondents said they were now buying more Chinese wine compared to their pre-pandemic habits (Kaye, 2021).

Production Issues

The production of Chinese wine is not on par with its international competitors due to the high cost of production, harsh or inconsistent climate, and labor force shortages in certain cases. The production is gradually increasing but not as much as its demand in the international markets as it is one of the industries in China, which is rather new and will take time to grow with government support. Structural problems such as difficult climate conditions, technical constraints, and low productivity facing wineries also make Chinese wines less competitive against imported wines.



China's domestic wine production has declined for five consecutive years since 2015. How this sector will develop in the future remains uncertain (Schillinger, 2019).

Production Quotas

The Chinese wine industry is striving to be known as a global industry contender, which in turn puts a huge pressure on the winemakers. Currently, production cannot meet the new local production demands set by the government. Due to the new trade regulations with Australia (putting a 212% tariff on Australian wine imports), domestic consumers have shifted to domestic wines. In addition, the growing demand for Chinese wines in foreign markets is also causing supply issues. Winemakers will need to be careful not to fall into the pitfalls that caused the initial distrust of domestic consumers, emphasizing quantity over quality. (Kaye, 2021)

International Competition

The international players in the wine market are dominated by France, Italy, Australia, and the US. It may be difficult for Chinese winemakers to compete with an already established market despite the quality is surprisingly good, considering that the industry is new and that most of the vines are less than 20 years old. Ningxia wines still lack complexity and structure, which could become the region's defining characteristics, compensated by their fruitiness, freshness, and minerality (Kaye, 2021). In China, some consumers are not well informed about the local producers producing high-quality wines and resort to international brands and labels, discouraging the wine producers from seeing its own country as a market to sell their products where internationally the Chinese wines and wine markets are getting recognition and people are developing a taste for it. International competitors like French wines, particularly Bordeaux, have consistently fared well with the country's fine wine drinkers. Bordeaux became a favorite among wealthy Chinese for gifting and as a status symbol (Cheng, 2021). Just ahead of France, Australia was the largest wine importer to China in 2020. See Figure 6 below.

Share by country in China's Imported Wine Market (2019)

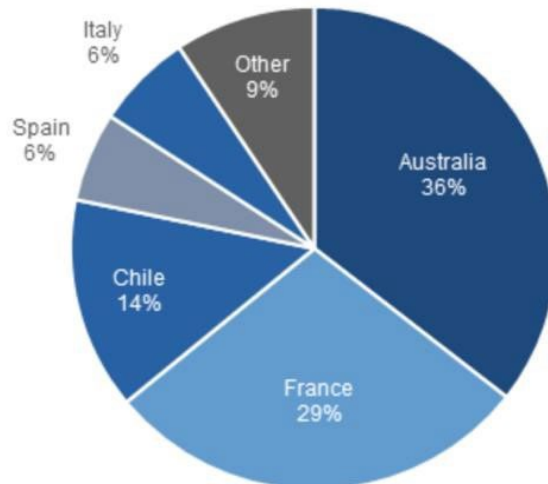


Figure 6. Share by Country in China's Imported wine market. Australia continued to export more wines than France to China in 2020.

However, due to newly established tariffs imposed on Australia, imports from Australia have plummeted. Australian winemakers shipped just 12 million Australian dollars (\$9 million) of wines to China in Q4 of 2020, from AU\$325 million a year earlier. This huge shift may increase the demand for domestic wines in China as Australian substitutes are no longer available. However, although Australia has found new markets in the UK and the US, China's markets are too much to pass up. They will likely try to pursue China again soon. Will Chinese winemakers be able to establish enough brand loyalty in domestic markets before that happens? (Kaye, 2021).

Emma Gao's Global Mindset Competencies

A global mindset is the ability to acknowledge and adapt to unique cultural customs with diverse groups of people without suffering any loss of communication. This exemplifies a growth mindset that organizational leaders must embrace to beat competition. Three capital pillars define a global mindset: psychological capital, social capital, and intellectual capital (Javidan, et.al. 2010). Each of the three capitals is a spectrum and covers various unique topics related to a leader's passion for diversity, intercultural empathy, and overall business savvy, respectively. Based on a person's background and current mindset, they may possess a high or low score on each of these capitals. Effective global leaders will score high across all three capitals, but it is important to note that each of these scores is not set in stone, and improvement through study and practice is possible. The next section will dive into how Emma Gao embraces each of the three pillars that make up a global mindset.

Global Psychological Capital refers to an individual's cognitive and emotional health, and how open they are to the prospect of embracing a global mindset. Overall, it refers to a leader's quest



for adventure, passion for diversity, and self-assurance. Global psychological capital may be one of Gao's strongest capabilities. In an industry as old and historic as wine, Gao must maintain a high level of global psychological capital. If she is not confident or does not wish to embrace adventure or diversity, will her brand succeed in markets flooded with alternative and more popular products?

As a true innovator, Emma Gao has displayed that her global psychological capital is defined by her courage in her studies and business practices. Through her travels, Gao's quest for adventure must be a relatively high score. She studied Oenology and worked in several organizations across France and China. There is not much information about the composition of the company's board of directors and staff, so it is hard to determine if Gao's passion for diversity is high. The fact that she embarked on building a company that produces a very foreign commodity compared to other Chinese companies may show that she is willing to improve this competency. Gao should consider hiring a more diverse team if she wishes to be a true global contender. Finally, Gao's self-assurance score should be the highest. Self-assurance correlates to one's confidence. Gao is a true innovator, breaking a variety of barriers. For example, the established wine culture of Europe is primarily male-dominated. Gao and other Chinese wineries are showing that women may be at the vanguard of the new wine industry. In addition, Gao has become the face of China's growing wine production. She has done many interviews for international news outlets. She does not lack the confidence to be an ambassador for her brand (Schillinger, 2019).

Social Global Capital comprises intercultural empathy, interpersonal impact, and diplomacy (Javidan et.al. 2010). It is essentially how well someone understands and relates to outside cultures and people and helps a leader build trusting relationships with dissimilar people. Silver Heights products sell in 15 countries, so she has developed relationships and understanding of cultures and people around the world. While she may not have a strong reputation and network in these countries, her experience will allow her to make those connections and gain trust. Through her role as a brand ambassador, Gao has shown she is able to maintain a high level of intercultural empathy. If she wishes to make her winery an eventual tourist destination, this will be a very important skill to have as well. While leveraging her knowledge of global cultures and empathy, Gao will need to gain experience in her diplomacy and impact on the regions Silver Heights is expanding to. Again, this may be more easily achieved if she takes the initiative to hire a more diverse workforce across all departments in the business and then utilizes their unique backgrounds in strategic planning.

Global Intellectual Capital refers to one's knowledge, and ability to grasp the complexities of global business dealings and political, social, and economic trends around the world. It includes a leader's global business savvy—how well they fully understand the end-to-end processes of their business as well as the constantly evolving trends and events that directly impact sales. Due to her background working both in France and China, Gao has developed a deep knowledge of these two markets. Gao has developed a great knowledge of wine-making operations. She has developed several innovations in her business to create products that rival her biggest global competitors. Respecting and fully understanding the main product she produces is essential for selling her product in markets full of self-proclaimed expert consumers. Studying in France, the birthplace of



winemaking certainly gave her a broad cosmopolitan outlook of general culture and international wine. Gao must leverage her business savviness to assess risk and reward before entering any new markets or developing new products. If Gao wishes to enter new markets, she needs to research what products would do well in these new markets. An understanding of the market, the people, and the competition is needed to thrive in new markets. While her cabernet sauvignon has been popular with wine critics, is it necessarily the best option for consumers in China, the US, and Europe? Gao will need to assess marketing data to develop the best strategies for the business. Currently, Silver Heights is limited to the climate and vines in Ningxia. Suppose Gao determines newer products are better suited for new markets she wishes to explore. In that case, she will need to utilize her wine-making knowledge to develop innovations to grow and produce varieties. Or she may even look to see if purchasing production facilities abroad in better climates is also an option. As stated above, leaders need to pay attention to global and regional trends in an industry like wine.

Global Expansion

There are many new and exciting areas for winemakers to pursue today. There are many countries where wine is gaining momentum among consumers where it did not exist before, such as Croatia, Armenia, the UK, and New Zealand. Emma Gao should consider that these new markets may wish to try some new wines not produced by their domestic producers (Kaye, 2021). In addition, according to some recent blogs, new trends are overtaking the wine industry. Small batch and natural wines are the number one. In recent years, there has been an increase in food production knowledge among consumers. Many consumers, especially in the US, want to know that the food they eat does not have any excess chemicals or additives. Although governments may pressure Silver Heights to increase quantity, they may want to take a step back and focus on improving the quality of their wine-making processes. High-altitude wines are another trend that resonates with Silver Heights. According to Nicolas Catena, an Argentine winemaker, there are some major benefits to growing wine grapes at an elevation greater than 3,000 feet. Grapes are exposed to lower temperatures and higher solar radiation, penetrating the grape skins more effectively to ripen the seeds better. Like the fashion industry, there are seasonal and cyclical trends in the food industry. If Silver Heights wants to compete in foreign markets, it must pay attention to such (*Marketview*, 2022).

Gao's target markets will be determined by two key factors: domestic Chinese consumers and international market trends and events. The recent pandemic has changed the drinking habits of Chinese consumers, and signals show there may still be room for growth. If China's tariffs with Australia eventually end, or if the Australian wine producers still try to enter Chinese markets, Gao will have to develop strategies to combat competition. Gao would need to solidify her relationships with Chinese consumers and establish brand loyalty.

Outside of China, the rest of the world represents a huge potential market for Chinese wine producers. Wine is a cultural commodity, so as it has been for the past several years, it will be difficult for Gao to infiltrate markets that already have a strong connection with more established wineries. However, there are other international markets yet to embrace the wine culture. This



may serve as an opportunity for Chinese producers to introduce themselves. Countries that do not have a strong wine culture should be easier for Silver Heights to penetrate, as competition will be lower. The challenge might be how to “convince” these cultures to start imbibing a new luxury commodity like wine. In addition, Silver Heights would need to define its customer base. An understanding of its customer base across age, race and space will help in marketing its existing products as well as developing new products that will appeal to its customer base.



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