



**“How did Lebanese wine emerge as a territorial wine brand  
in the 25 years that followed the civil war ending in 1990?**

***Mistakes made and lessons learnt’***

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## 1. Summary

The Lebanese wine trade holds a distinct position in the global market. It is one of the few Middle Eastern countries to have a wine trade of significant size (8 million bottles per year) and with a cultural heritage of wine making spanning 5000 years<sup>1</sup>. Lebanon has also faced a number of significant challenges due to the political conflicts in its region that have impacted its ability to trade; most specifically during the civil war of 1975-1990.

However, the relative stability that followed these years enabled the wine trade to develop, with the number of wineries growing from five to fifty in the present day. This research paper aims to examine how these wineries chose to brand themselves collectively during this period. Furthermore, it evaluates if there was a unified approach across the industry. The paper will consider whether these decisions were successful in creating a globally recognised territorial wine brand for the country and what lessons could be learnt for the present day industry.

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<sup>1</sup> Rozelier (2012) p19

## **2. Introduction**

As the global wine industry evolves, many emerging regions are trying to break into the crowded global market place. In order to do this, these regions must position themselves against a wealth of countries already well established in a consumer's mind for producing wine. This research paper aims to ascertain the value of using territorial branding in this context. These type of brands allow a set of wineries from one country to group together, in order to deliver a single, unifying message to a consumer. When successful, the delivery of these brands is more impactful and commercially efficient than one winery can be alone. Examples of already successful territorial brands exist across the wine world. From regional brands like the Comité Interprofessionnel du Vin de Champagne (CIVC) to country brands like Wines of New Zealand (WINZ).

Lebanon has been selected as an example of an emerging territory that has worked as a collective of wineries to develop and promote their industry over the past two decades. As a lesser known region it will provide a useful case study for other countries to follow.

The analysis that follows has focused on the techniques used by the collective of Lebanese wineries versus a framework for a successful territorial brand established in the literature review. Due to a lack of available statistical data, qualitative research formed the basis of the study. This took the form of semi-structured, in-depth interviews with Lebanese wineries, plus retailers and importers in the UK export market. The findings were used to evaluate how their territorial brand strategy was

constructed over this time. Interview responses were cross referenced and weighted to validate conclusions.

### 3. History of Lebanese Wine Trade

Lebanon has a rich history of winemaking, starting around 3000 BC with the spread of winemaking by Phoenicians across the Levant. It holds the original temple of Bacchus in Baalbeck and was cited in the writings of Pliny as having three esteemed areas for wine production; among his list equivalent to “Grand Cru” rankings<sup>2</sup>.

During the Ottoman rule from the 13<sup>th</sup> century, production declined and arak took its place. However, with the arrival of Jesuit missionaries in the 19<sup>th</sup> century it recommenced. The French mandate rule (1920-43) created an increased demand for wine which helped enhance the industry<sup>3</sup>.

Nevertheless, it remained a small industry; by the outbreak of war in 1975 there were only five wineries of significant size with total production around two million bottles (Appendix 7). It was the end of the civil war in 1990 that created the stimulus for change. During the war, travel to the production region of Bekaa was impossible for many of the existing wineries. As the war ended, travel was unrestricted and many expatriates returned with money to invest in their homeland<sup>4</sup>.

During the 1990s the three major wineries that controlled 90% of production took steps to set up a structure for the wine industry that remains today; Chateaux Ksara, Keyfraya and Musar<sup>5</sup>. In 1994 the International Organisation of Vines and Wine (OIV) encouraged Lebanon to join; which it did in 1996. Then in 1997 these wineries lobbied the government to establish the Union Vinicole du Liban (UVL); an

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<sup>2</sup> Rozelier (2012) p26

<sup>3</sup> Karam (2010) p14

<sup>4</sup> Rozelier (2012) p20

<sup>5</sup> Rozelier (2012) p19

organisation aimed to bring together wineries as a collective force (Appendix 7).

By 1997 there were eight wineries and significant investment was being made into both new and existing wineries plus vineyard sites. By 2015 this grew to fifty wineries of varying sizes. It is still a small country with roughly the same size of production as Switzerland; 2500-3000 hectares and now around 8 million bottles produced a year<sup>6</sup>. The domestic market is small due to the strong and growing influence of the Muslim population. Hence export is a focus for the wine trade, with France and UK being the most important markets given the high number of Lebanese expatriates living there.

The UK became an important target market after the success of Lebanese winery Chateau Musar in this country during the 1980s. The owner Serge Hochar was a true pioneer, producing a unique style of wine made by natural winemaking and prolonged ageing. He was renowned for his personal selling skills, making use of the dramatic backdrop of war, to present a high quality wine made under adverse conditions. In 1984 he was named “Man of the Year” by Decanter magazine; his legacy lives on for the Lebanese wine trade<sup>7</sup>.

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<sup>6</sup> Rozelier (2012) p19

<sup>7</sup> Karam (2005) p93

## 4. Literature review

### 4.1 Territorial Branding Theory

There is an emerging body of work on the subject of territorial branding, specifically looking at the value it can give to the wine industry. Region of origin is an established product cue in the wine industry, particularly in Europe, which incorporates many legal designations related to geography, such as Appellation d'Origine Contrôlée (AOC)<sup>8</sup>.

The concept of territorial branding takes this further, so that the product is inextricably linked to that place. “These kind of brands tend to originate from a single place or territory from which it is impossible to separate them and which offers a group of competing organisations a collective, overarching brand identity”<sup>9</sup>

These studies show that territorial branding can be a powerful tool within the competitive marketplace for wine, helping distinguish wines from that region against competitors. Examples that have been cited as strong territorial wine brands are: Champagne, California and Central Otago.

Michael Porter’s paper “Clusters and the new economics of competition”<sup>10</sup> was the first to develop a theory relating to why collective wine branding was important; using the California wine industry as the case study. In his definition “clusters are geographic concentrations of interconnected companies and institutions in a

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<sup>8</sup>[https://en.wikipedia.org/wiki/List\\_of\\_Appellation\\_d%27Origine\\_Contr%C3%B4l%C3%A9e\\_wines](https://en.wikipedia.org/wiki/List_of_Appellation_d%27Origine_Contr%C3%B4l%C3%A9e_wines)

<sup>9</sup> Charters & Spielmann (2013) p1461

<sup>10</sup> Porter (1998) p78

particular field”<sup>11</sup>. He describes globalisation as creating an environment of increased competition, where brands must seek new ways to develop competitive advantage. Clusters can do this via “competition and co-operation”<sup>12</sup>, pooling resources creates efficiencies and healthy competition encourages the industry to grow. Common themes from these papers emerge that indicate what makes a successful territorial brand. These are now considered in further detail.

#### **4.1.1 Infrastructure**

A study of protected designation of origin showed that it was important to have institutions with legal weight, in order to protect the territorial brand and maintain its quality credentials.<sup>13</sup> It also showed that government investment can help deliver the collective marketing activity to encourage emerging regions to grow. Other papers supported the importance of having territorial brands backed by institutions, such as WINZ in New Zealand, that can co-ordinate activity.<sup>14</sup>

#### **4.1.2 Pioneers**

A common feature of strong emerging regions are pioneers that lead the way in the initial stages. Charters and Mitchell cite the pioneers in the early stages of the emerging Central Otago region who were praised for acting together and sharing ideas, helping to galvanise the industry.<sup>15</sup>

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<sup>11</sup> Porter (1998) p78

<sup>12</sup> Porter (1998) p79

<sup>13</sup> Borg & Gratzner (2013) p34

<sup>14</sup> Lindgreen & Beverland (2002) p8

<sup>15</sup> Charters & Mitchell(2011) p4

### **4.1.3 Common Mythology**

A key benefit of a territorial brand is that it can focus the region under one umbrella brand to deliver a clear and consistent message to the customer. Champagne and Central Otago were cited as cases where a strong mythology was presented to consumers<sup>16</sup>. This offers itself as “a series of stories which emphasise the individual brand’s integration into the territorial whole, and the evolutionary success of the brand”<sup>17</sup>. In this context the myth is true, rather than imaginary. To be effective it should emphasise the natural environment and expertise in that region; the consumer must believe there is a fit between the territory and the product for the brand to be effective<sup>18</sup>.

### **4.1.4 Collective Identity**

Literature indicates a prerequisite for a strong territorial brand is a “consistent position, clear identity, defined personality...and to be “overarching”; meaning it includes all proprietary brands in the territory”<sup>19</sup>. A study of territorial identity in Tuscany, highlighted this feature as a de-risk factor in purchase decision, giving consumers a shorthand in the expected wine style<sup>20</sup>. Rocchi and Gabbai refer to wine being part of the “Marshallian Buying Framework” where the specialised inputs and dedicated outputs imply a high risk product to consumer<sup>21</sup>. This is heightened when considering an emerging region not known for producing wine, thereby making a strong collective identity especially important.

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<sup>16</sup> Charters & Mitchell (2011) p6

<sup>17</sup> Charters & Spielmann(2013) p1464

<sup>18</sup> Van Ittersum & Candel & Meulenberg. (2003) p216

<sup>19</sup> Charters & Spielmann (2013) p 1462

<sup>20</sup> Rocchi & Gabbai (2013) p2

<sup>21</sup> Rocchi & Gabbai (2013) p3

#### **4.1.5 Effective Brand Management**

Theories of territorial branding have identified the importance of a brand manager. Within the territorial brand there is a natural tension, given that there is both co-operation and competition between individual brands. The manager plays a role of diplomacy “so that all producers and growers feel that they benefit from the success of their collective product” and to “ensure the shared mythology has transcended the differences of individual actors”<sup>22</sup>. An example of this would be the CIVC in Champagne that controls production, co-ordinates marketing and research activity for the region.

#### **4.1.6 Joint Activity**

Porter referenced the “resource pool” benefit of a cluster<sup>23</sup>. Further studies of territorial branding expand that “geographic clusters offer its members economies of scale” with the “means of co-ordinating, marketing and strategically directing the whole cluster”<sup>24</sup>. Many studies note the benefit of marketing activity conducted by a group; in New Zealand the WINZ group said “the best way for us to expand the New Zealand market share overseas is to go in as a group, [so] we make a bigger impact”<sup>25</sup>. Wine is a crowded market and in this environment a sole actor would struggle to get noticed. Other synergies can also be created by information sharing that takes place between wineries during these events or joint research initiatives.

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<sup>22</sup> Charters, Menival & Mitchell (2011) p5

<sup>23</sup> Porter(1998) p81

<sup>24</sup> Charters, Mitchell, Menival (2011) p6

<sup>25</sup> Lindgreen& Beverland, (2002) p8

Many articles note that a territorial brand needs time to develop. Therefore, there must be a consensus between wineries to sustain activity for years before the benefits are achieved.

#### **4.1.7 Pitfalls and dangers**

There are also threats to a successful territorial brand that need to be controlled. First if there is a dominant brand, it can override the consumer's perception of the region and limit the ability of a territorial brand to establish itself<sup>26</sup>. Quality inconsistency can be a problem. One sub-standard winery can easily damage the image of the entire group. The infrastructure that is used must have good quality controls in place and prohibit membership to those wineries that don't meet that criteria<sup>27</sup>. Finally consumers can have a pre-conceived impression of the region, including its suitability for wine production, which can limit how the territorial brand will be received<sup>28</sup>. For example, the English wine industry can suffer from consumer misconception that the climate is too cold for viticulture. In order to redress this, the English Wine Producer website emphasises the history of winemaking dating back to Roman Britain<sup>29</sup>.

## **4.2 Wine Branding**

A recent Wine Intelligence workshop titled "Building Successful Wine Brands" explored research on brand purpose, positioning and architecture (Appendix 8). Two conclusions relating to this study came from that seminar.

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<sup>26</sup> Charters & Spielmann (2013) p1462

<sup>27</sup> Rocchi & Gabbai (2013) p4

<sup>28</sup> Van Ittersum & Candel & Meulenbergh. (2003) p217

<sup>29</sup> <http://www.englishwineproducers.co.uk/background/history>

Wine Intelligence highlight “authenticity as a better predictor of purchase intention than brand love, trust and credibility”<sup>30</sup>. A Vinitrac study of US consumers showed the most favoured descriptor of authenticity was “The wine producer has been making good wine for many year’s” which received 51% consumer approval<sup>31</sup>. Whilst this research paper is based on European consumer’s reaction to Lebanese wines, this does suggest that heritage cues will be an important feature for a territorial brand.

Additionally Wine Intelligence research indicated that successful brand labels need to strike the balance between central (traditional) and distinctive (modern) designs; “to reassure the consumer it’s a genuine, quality product” and to stand out from the crowd<sup>32</sup>.

### **4.3 Lebanese Wine**

#### **4.3.1 Promotion**

Three books written on Lebanese wine history were reviewed to support information in the introduction of this study. The most recent, “ZAWAQ Lebanese Wine Guide” also contained a panel review of wines using international judges. Their commentary assessed Lebanese wines as “light years ahead” of neighbours such as Israel. They also praised the potential; “Lebanon’s primary advantage is its exceptional terroir”<sup>33</sup> but emphasise it “is still searching for its identity”<sup>34</sup>.

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<sup>30</sup> Boyle (2004)

<sup>31</sup> Wine Intelligence (July 2016)

<sup>32</sup> Wine IQ (2016) p8

<sup>33</sup> Rozelier (2012) p31

<sup>34</sup> Rozelier (2013) p 31

Wines of Lebanon UK campaign summaries and marketing material were examined for two periods of activity 2010-11 and 2012-13 (Appendices 9 and 12). These summaries show the range of marketing activity that occurred, featuring trade tastings and press trips. The press articles that resulted from these campaigns are included.

The 2010-11 summary lays out the objectives to “build a stronger more compelling story for the media, trade and ultimately the consumer” and recommends that “co-ordinated activity create a much stronger impact than individual efforts”.

Press clippings from both campaigns cover top broadsheet and trade journalists, most of whom visited Lebanon, indicating the success of the campaign and in particular these visits. The Coco PR press release captured in the 2012-13 review indicates that exports to the UK in that period rose by 33% as a result of the campaign (Appendix 12).

Remarks from journalists provide a useful backdrop to critic’s preconceptions of Lebanese wines and how the campaign altered them. Fiona Beckett sums this up in her article for The Guardian newspaper on Lebanon. ““If I was to ask you to name a Lebanese wine, I reckon there is a 99% chance you would mention Musar...it’s easy to assume that every wine is made in the same mould but that’s far from the truth, as I discovered when I visited Lebanon a few weeks ago”. This type of commentary on Musar was echoed in other journalist press clippings.

Many journalists reference surprise at the quality, Victoria Moore said “I hadn’t expected the wine to be consistently so good”. Some refer to styles, Fiona Beckett describes it as “an exotic cross between Bandol and Bordeaux” whilst Tim Atkin and Victoria Moore encourage a focus on old vine Cinsault.

An example of a Prowein wine fair 2013 tasting booklet for “Wines of Lebanon” demonstrates the story that Michael Karam uses to present Lebanese wine history (Appendix 11). It shows he delivered the story using a broad sweep of history, rather than emphasising war, which had been Musar’s approach in the past.

#### **4.3.2 Studies of Terroir and Ethnography of Wine Regions**

An ethnographical study of the Keyfraya village in the Bekaa region described the changes in the wine industry as production has grown. It referenced the struggle to get the UVL established in 2007, due to a policy of inaction from a Shi’a Muslim agricultural minister. It was in 2013 when a new Christian minister took control that it was formalised<sup>35</sup>. Saleh notes the early dominance of the big three wineries and their desire to use the UVL to control other wineries and grape growers, leading to the exit from the group of one winery in 2005<sup>36</sup>. It acknowledges the use of informal networks between wineries creating information sharing, and describes the shift in vineyard plantings, moving from bush vine Cinsault to international varieties over the 1990s.

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<sup>35</sup> Saleh (2013) p 231

<sup>36</sup> Saleh (2013) p209

A terroir study by Joseph Mourkazel on Lebanon refers to a high quality potential, rating 65% of viticulture land good or exceptional, with rich mineral content soils<sup>37</sup>. He also discovered varying terroir across the emerging regions. However, his conclusion suggests keeping one generic AOC Liban to give producers optimum flexibility to experiment with varieties and viticulture techniques<sup>38</sup>.

### **4.3.3 Lebanese Economic and Trade journals**

Two government and economic research institute papers describe the emerging wine industry. Blominvest states a wine export value increase 2009-12 from \$11.3-14.3 million US, referencing the UK as the biggest importer at 29%. It recommends a focus on quality orientation for the industry since it cannot compete on the mass market.<sup>39</sup>

The MOET newsletter from the Economic Research Unit evaluates the challenges facing the wine industry and its shortcomings<sup>40</sup>. It suggests a “lack of co-ordination among the wineries to sell the “Lebanese” brand” and the need to be “better managed through laws, regulations and a common voice”. It encourages the formation of the independent body the “National Wine Institute” (realised in 2013) to support the UVL and “enhance the credibility” of the wine trade. It recommends a future where the industry better exploits its varying terroir to produce a range of styles. And to join a “number of institutions that are training or providing research

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<sup>37</sup> Mourkazel (2013) p67

<sup>38</sup> Moukarzel (2013) p50

<sup>39</sup> Blominvest (2013) Issue 827

<sup>40</sup> Moet Newsletter (2010) p1

methods to learn about and improve viticulture”<sup>41</sup> such as University of Saint Joseph and Lebanese Agricultural Research Institution.

The literature review provided a good framework for establishing what makes a successful territorial brand. However, there was a lack of secondary sources that would provide evidence of the individual or collective brand strategy used by wineries during the period studied. There was no complete archive of published articles on the Lebanese wine industry in the UK that would have helped measure the impact of their campaign. The selected articles provided by wineries and public relations experts only gave an impression of the reaction they received. Furthermore, it was not possible to source official export or sales data that could have proved the success of this strategy. Production data was provided by one winery on behalf of the UVL which qualified the estimated growth of the industry over this period (Appendix 7).

This meant the purpose of the research was to fill these gaps of knowledge via in-depth interviews in Lebanon and the export market. The focus was to obtain evidence of what type of collaborative and territorial branding activity took place. Then to judge how well it fitted the model of a successful brand established in this review.

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<sup>41</sup> Economic Research Unit (2010) p6

## **5. Methodology**

In order to gain an understanding of the political events influencing the wine industry, David Hirst's modern history of Lebanon was used to collate a timeline that helped formulate a skeleton structure for primary research.

### **Primary Research**

#### **5.1 – Semi-Structured Interviews**

The author had several contacts within the Lebanese wine industry due to having conducted a business trip there in 2012. A meeting was set with these contacts at Prowein 2016 trade fair to discuss the approach for research. Informal interviews with two wineries enabled exploration of initial ideas and to devise the final interview structure.

These wineries and a representative of "Wines of Lebanon" suggested a list of wineries to meet in Lebanon, based on criteria set by the author. The final ten selected varied in turnover, style and age and included non-members of the UVL.

An in-depth interview was formulated around nineteen open ended questions, with sub questions that were used as prompts to the author for discussion (Appendix 3).

A visit to Lebanon in May 2016 provided the opportunity to interview nine wineries in person. The final winery owner was interviewed by phone. All interactions were recorded and supported by type written field notes. Wineries were asked to deliver examples of marketing material and labels for further analysis.

Every winery was given a brief (Appendix 5). The stated purpose of the project was intentionally broad; a “study of the history of the Lebanese wine industry”. This helped maintain non-prepared responses from interviewees. The author made clear that the project had no impact on future business activities to avoid ethical conflict. Respondents were informed their comments would remain anonymous to encourage open answers

A further seven in-depth interviews were conducted on the export market in the UK with importers, retailers, and figures that had been consultants to Wines of Lebanon. These followed a broad structure adapted to each respondent (Appendix 4). Depending on circumstances, these were a mixture of in person, telephone or email responses.

At this point campaign summaries from Coco PR were obtained and reviewed. This added further insight into the type of marketing activity conducted by Wines of Lebanon during this period. Furthermore, press cuttings gave an impression of the level and type of response their campaign received from trade press.

## **5.2 - Data Analysis**

All interviews were transcribed and collated with type written field notes. A total of 76,109 words of transcriptions and 14,236 of written field notes were compiled. These were then colour coded for emerging themes. These themes were driven by the literature review and common discussion points during interviews. A final grid system brought these together to record areas of agreement or disagreement. Then these were weighted according to the number of recipients that referred to them,

plus tone and force of delivery. A full list with interviewee profiles is included in Appendix 2.

### **5.3 - Limitations**

English is not the first language for many interviewees, therefore there was potential for questions to be misinterpreted and responses to be unclear. The author noted a reverence from respondents to the founding members of the industry and a reluctance to openly criticise their activities. Lebanon is a proud culture which potentially limited some from admitting what could have done better. A mechanical error with the dicta-phone, meant that all transcriptions were affected by breaks in commentary. Fortunately, the field notes provided sufficient back up. But this did mean there were limited quotes that could be used in analysis.

## **6. Findings and Analysis**

### **6.1 Infrastructure**

#### **6.1.1 Organisation of Vines and Wine (OIV)**

As aforementioned, the Lebanese wine industry joined the OIV in 1996. The three largest wineries represented by Charles Ghostine of Chateau Ksara, along with Serge Hochar of Chateau Musar and Michel De Bustros of Chateau Keyfraya, worked together to make this possible. Hochar then represented Lebanon at the OIV for fifteen years. All wineries interviewed noted this as an important step to legitimise the wine trade. It was especially important for an emerging region trying to gain a foothold in the export market, since membership was a quality indicator for distributors and potential buyers (W1/2/7/5)<sup>42</sup>. However, there is consensus among wineries that the intention was to use this as a stepping stone to create a national institution that would implement the recommended standards of the OIV, otherwise membership was purely “window dressing” (W8/10).

#### **6.1.2 Union Vinicole du Liban (UVL)**

Furthermore, in 1997 these same figures established the Union Vinicole du Liban. At present this has twenty-two members representing 93% of production, an indication that the big three wineries still dominate the output of the industry (W1). There is agreement among wineries that this institution has not been as active as

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<sup>42</sup> These coded references relate to interviewees who made the specific point. See Appendix 2 for a profile of each respondent.

intended. It has been slow to come to fruition, wine laws were established in 2000 but a formal government institution to implement them was not created until 2013.

Several wineries mention that in the initial years the UVL was dominated by larger wineries interested in using it to set grape prices, an insight supported in the ethnographic study referenced in the literature review (W3/4/9). This is an important aspect of Lebanese production because most wineries buy in a high percentage of grapes from growers. One significant winery left the group in 2005 because they regarded it as an institution protecting the monopoly of large wineries (BM1/W6/9). This winery has built a successful global business, acting via importers on the export markets. On questioning, this respondent said “I told them you should arrive at the airport of Lebanon and read Wine[’s of] Lebanon as a destination, not this winery...that winery” (W6). Indicating this winery believed the larger wineries still sought to push their individual business more than the collective brand.

Motivations for being part of this organisation also differ. One of the original members saw the UVL as a law enforcer against newcomers “to make sure you wouldn’t have someone coming and producing wine that would destroy your name” (W5). Another saw it as a lobby group “having one voice with legal entity to create a good environment for wine industry” (W8).

The debate today is whether the UVL should have a technical or marketing focus, which two wineries noted is a regular topic at monthly committee meetings (W2/9).

Interviewees showed a predominant enthusiasm for the potential of the UVL, even from those who are not members. Newcomers are encouraging the UVL to refocus on marketing strategy (W9). Generic activity between wineries at trade fairs has improved cohesion but “there is still inconsistency in understanding what needs to be done to promote in a global industry” (BM1).

Common recommendations for change among wineries were to have a quality charter for new members, a mission statement to focus their aim and to encourage full industry membership by making “fees proportionate to their production” (W2/3/4/7/9).

### **6.1.3 Geographical Indication (Appellation) Designation**

Many strong territorial brands have a legal designation that links to their precise geographical entity. These ring fence specific areas of land with superior terroir offering a sign post of quality to a consumer and a unique selling point to the producer. For Lebanon there is the question of whether a system would add credibility to their trade or a layer of unnecessary complexity.

As referenced in the literature review, a terroir study, wine experts and broadsheet journalists have praised the quality of their viticultural landscape; a Mediterranean climate, accompanied with high altitude sites, plus rich limestone soils in the Bekaa valley. This rare combination, produces lively but rich tasting wines. The question is whether a geographical indication based on regions would further emphasise this quality potential.

Only a few wineries work with grapes from individual terroir. These wineries support an appellation system defining each region's terroir and those with superior quality. However, they acknowledge further studies are required to define the best areas (W6/8/10). Other wineries are reticent and correctly reference that the majority of production takes place in the Bekaa Valley, therefore classifying multiple regions is of value to few producers. A generic "AOC Liban" would give the industry a clearer message to deliver to consumers, with production controls to enhance their credibility (W7/9).

#### **6.1.4 Lebanese Government**

The political backdrop of Lebanon as a wine producing region is unique. The period of civil war was an obvious barrier to the development of the industry; wine-making land was occupied and wineries made inaccessible. The end of war with the return of ex-patriots and influx of investment was an opportunity. However, it came with complications that influence how the infrastructure could develop.

Several interviewees support the finding from the literature review, that the influence of the Shi'ia (Muslim) agricultural minister, during the period studied, delayed progress (W1/8/BM1). As a result, the creation of the "National Wine Institute" to issue wine laws happened when a Christian minister replaced him in 2013.

The industry also lacks investment from the government. When it came, it was sporadic and directed incorrectly. There were several "one-off" pieces of funding, for example over €100,000 in 2013 for a tasting event in Paris. The criticism is "instead of channelling the money into one continuous marketing program, the funds are used

to host 'wine days' in what are seen as prestigious locations" but not necessarily the most appropriate for an export opportunity (BM1).

## **Summary**

The Lebanese wine industry took impressive steps in its early years to set up an infrastructure that would be appropriate to develop a territorial brand as the industry grew. The potential has yet come to fruition due to a lack of coherent focus among members. Inconsistent government support has limited their institution from realising its original aims, in particular to gain legal force. This suggests that infrastructure must be backed by an institution with a clear mission statement and a quality charter that is implemented by law, to create a credible territorial brand.

## **6.2 Pioneers**

Literature on the territorial wine brand has indicated a critical success factor for a strong brand as pioneers. There were a number of these in Lebanon.

### **6.2.1 Serge Hochar**

Interviewees during this study were all asked to name the three most influential people in their industry's history. With only one exception the name Serge Hochar of Chateau Musar was stated and many said "he put us on the map" (W1/2/6/9/10).

This is supported by every interviewee on the import market, who all noted Musar as the first Lebanese wine they experienced. However, whilst Hochar managed to open the door for Lebanon to the wine world his influence had complex connotations.

Those interviewed on the export market felt the image of Musar is so dominant "it is a one wine country to some" (R2). Chateau Musar is also described as a "marmite"

wine that inspires either love or hate (PR1). A wine that has lengthy maturation and is made with natural winemaking that can bring out volatility and “sweaty saddle” notes (I2/R2). Furthermore, importers believed that if a large retailer had Musar on their shelves, they would not need a second Lebanese wine (I1/I3).

Wineries showed a deep respect for Musar but there were undertones of its negative influence to their territorial brand. One winery said he “pushed Musar not Lebanon” (W4). Another noted that consumers would be disappointed their wines did not taste like Musar (W1).

Hochar’s sales technique is another part of his legacy, described as “brilliantly wacky” by one retailer who stocked his wine in the 1990s (R2). He was a talented personal seller, communicating a compelling story of a wine made under the adversity of civil war. He based himself in the UK during the civil war and set up a company to manage distribution rather than using agencies. This enabled him to build close relationships with the trade and journalists. Respondents on the export market and one winery suggested the need to learn from this and use more personal selling as well as joint activity to achieve commercial success (PR1/W2/I2).

Certainly Musar was “fashionable and cult” and an example of success that spurred on other Lebanese wineries to attempt to export (R1). Hochar also played a role via the UVL as mentor to younger wine-makers (W2). It is more recently as new wineries attempt to enter the UK market that Musar forms an obstacle to their progression.

### **6.2.2 Other leaders**

There were other pioneers of the industry who helped galvanise the emerging scene. Michel de Bustros of Chateau Kefraya was mentioned for having the vision to plant West Bekaa with over 300 hectares in the 1950s, launching their Chateau brand in 1979 despite the civil war (W1/3/8/9/10).

For many it is the second wave of wineries from 1997 onwards that spurred on the industry, especially in terms of quality. Some respondents refer to the Ghosn brothers, a family who repatriated land in the Bekaa and established their now thriving brand Massaya (W3/9). The long established wineries acknowledge that the expansion of the industry has created healthy competition (W1/8/9).

### **Summary**

These examples show that pioneers are important but can offer negative as well as positive influences to those that follow. If there was no Serge Hochar or Michel de Bustros there may have been no OIV or UVL which are fundamental building blocks for a territorial brand. If Hochar had not made such a large impression on the trade in the United Kingdom, then the brand would have more of a blank page to build on. What they do have is a brand legacy with a premium image, one that is divisive and very different in style to the other wineries. It means the challenge is to utilise the premium association of Musar whilst asserting a different brand image that helps consumers identify with them.

### **6.3 Common Mythology**

A strong territorial brand will have a consistent story that gives a clear identity to their region, distinct to others and backing up quality credentials. Lebanon has multiple angles it can utilise:

#### **6.3.1 War**

The backdrop of the 1975-1990 civil war and continued political instability does give Lebanon a unique image; neatly summed up by one winery as a “sexy story” (W2). All importers and retailers referenced it as a useful selling tool, describing Lebanese wines as “exotic with a whiff of danger” (I2). Hochar certainly used the image of making wine in the adverse conditions of civil war as his selling tool. However, the relevance of this may be in question today. The civil war is over, and with the advent of global terrorism the political troubles surrounding Lebanon today strike a different chord with consumers. Several producers discussed the need to break away from this image, to get journalists and consumers to write and taste “not just because of Lebanese war, but because it is a good wine” (W1/3/9). Marketing material from the literature review shows the image they portrayed is focused on ancient history rather than war. However, the resulting journalist articles continue to use the war as their main tagline.

#### **6.3.2 Heritage**

Lebanon has a rich heritage of winemaking dating back to the Phoenician times. It also has a period of French colonial rule in the 1920s which revived interest in wine and has influenced their style today. Both of these stories have the potential to validate their winemaking expertise. During interviews with wineries they all

referenced heritage and “that they made wine thousands of years ago, so it is very much in our genes” (W6). Nevertheless, as one interviewee on the export market warned, there are now too many wine regions saying “wine started here” (PR1).

### **6.3.3 Terroir**

As referenced in the literature review, an important determinant for the success of territorial brand is a fit between the natural environment and the product in a consumer’s mind. Several wineries interviewed mentioned that consumers believed Lebanon was a “desert” (W3/5/7) or ask “do you use camels to harvest?” (W7). Interviewees did not show a consistent way of defining their terroir, only some spoke about the influence of altitude and the quality of Bekaa valley limestone soils (W1/8/10). The industry needs to create a story that reassures consumers of their natural environment and how it is suited to viticulture. The ZAWAQ Lebanese wine guide points out that the country has “exceptional terroir”<sup>43</sup> and this is followed through in the presentation style of Michael Karam for Wines of Lebanon at international fairs.

### **Summary**

The mythology of war is a clearly compelling story for journalists and consumers but it is danger of being outdated. The image of war does not give their wines real credibility; therefore they need to continue to try to divert attention away from this as their identity. To give consumers real confidence in the quality of Lebanese wine the focus needs to move onto heritage and terroir. The emphasis should be on how this has influenced their expertise rather claiming to be the origin of wine. They could

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<sup>43</sup> Rozellier (2012) p31

expand this further to relate to Lebanon's history as a seat of learning and food culture. This strategy will build the sophisticated image that gives their wines greater credibility. As referenced in the literature review, an emphasis on authenticity and quality of environment, will help "de-risk" consumer purchase. This will be more likely to encourage trial of this emerging region in a competitive global market.

#### **6.4 Collective Identity**

A collective identity is to give the customers intrinsic or extrinsic cues in the form of wine style or packaging that will meet their expectations of the territorial brand.

##### **6.4.1 Wine Style**

The literature review indicated Lebanon is far from establishing its style identity. Comments from journalists and the ZAWAQ review judge's, support that it needs more focus. Further, there is the added complexity that the style of Chateau Musar is distinctly different to other wineries.

Most wineries acknowledged this disparity in style but were not conclusive in what direction it should take (W3/7/8/9). Some mentioned the need for a "common signature, especially for the Bekaa where there is a real influence of terroir" (W8). It is clear that styles have been evolving over time. At the end of the civil war the focus remained on the Cinsault blends using vines that were planted in the 1920s to suit the tastes of the local French market. Then between 1993 and 1997, 310 hectares were planted with international varieties like Cabernet Sauvignon or Chardonnay (Appendix 7) and existing growers were encouraged to replace Cinsault with these

varieties<sup>44</sup> (W1/9). At this stage, Batroun and Jezzine regions were established that had different terroir to the Bekaa, the original area of production (W1/6/9). In the final years of this study interest grew in indigenous grapes Obedeih and Merwah; and renewed appreciation of old vine Cinsault and Carignan (W2/3/7).

Amongst the confusion of styles emerging there is consensus that an overarching style shift has occurred from “body building wine with a lot of age potential” to “feminine wines” with less oak (W3). Importers and retailers mention a stylistic shift to “cleaner wines with more distinction” than in the 1990s (R3). There is also an acknowledgment from wineries that the native varietal blends are “niche”, “interesting to connoisseurs” but should not be the main focus (W1/3/8). The direction that is given by importers and journalists are to work on the old vine styles and blends that have the best link to their heritage (I1/JR1/PR1).

#### **6.4.2 Packaging**

The packaging of wines falls into two camps. First a traditional label design playing heavily on the link to France using Bordeaux-esque layout. These often feature a picture of the property, and heavy old fashioned fonts, emphasising “Chateau” or “Domaine” in the brand name (Appendix 9). Newcomers have tended to take a different approach using names with no French link (Massaya or Ixsir) and sleek modern designs using emblems related to the local area (see Appendix 9). The issue with this new direction is the lack of an obvious extrinsic cue to their country; at least the traditional design references heritage.

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<sup>44</sup> Saleh (2013) p131

A notable exception is Ixsir that has been the first to use a Phoenician poem on the front label of its premium range “El Ixsir”. This design uses a modern approach whilst incorporating a strong link to ancestry. Given heritage is a reassuring cue, the French influenced designs are relevant to a degree; after all the most successful Lebanese brand Musar has a distinctly French style label. One importer found the link to the 1920s era and France helped make the wines more credible (12).

This shows that designs are falling into the two extremes, the “central” or “distinctive” categories outlined by Wine Intelligence research. Although their conclusion was a successful brand needs to strike the balance between the two.

## **Summary**

The Lebanese wine industry needs to develop a consistent identity that relates well to its unique selling points as a region. It makes sense to use heritage as a starting point thereby focusing on wine styles with a history. This will build their “authenticity” credentials, highlighted as a key purchasing cue in the literature review. Part of that heritage is their link to France, therefore it is credible to package with some affiliation in style. Nevertheless, it is important to assert their own sense of place with confidence, especially to give consumers the extrinsic cues in packaging that will help the brand of Lebanon stand out in a crowded market place.

## **6.5 Joint Marketing Activity**

For a country with limited financial resources and emerging small wineries joint activity is a critical advantage in a global marketplace.

### **6.5.1 Wines of Lebanon UK**

The first joint marketing activity of significant scale was in the creation of Wines of Lebanon for the UK market in 2009. The UVL hired Madeleine Waters (who had experience with Napa Valley Vintners) as P.R. consultant. This was marked as a turning point by interviewees, she was able to help the industry adapt to be “slick[er] and behaving like a wine country” (PR1, BM1). Additionally, she had an important bank of journalist and trade contacts.

### **6.5.2 Trade Fairs**

Only ten of the total UVL membership worked on the first Wines of Lebanon UK campaign, equally sharing costs. The focus was on trade fairs with branded stands, offering tastings and presentations lead by journalist Michael Karam. Importers and retailers interviewed for this study noted the positive impact of this exposure; a few wineries gained distribution like Domaines des Tourelles with Boutinot (I2), and a major retailer Marks and Spencer, listed three wines in 2012 as a direct result (R1).

An importer also suggested there was a special attraction when they presented themselves as a “Band of Brothers, like Central Otago” (I2). Most acknowledged this joint activity gave them a higher chance of being noticed by journalists or importers than when presented as a single winery. To some wineries, the negative was that visitors could gain an overall impression that “Lebanon is not bad...they are doing good wine” rather than remember an individual winery (W9).

The absence of some of the larger wineries (Massaya and Musar) did dilute the potential impact of the territorial brand but the scale was sufficient to draw in

journalists, retailers and importers (I1/2/R1/PR2). Given the dominant image of Musar in export markets, it may have served the other wineries to present themselves separately in order to develop a distinct territorial brand image.

### **6.5.3 Journalist Visits**

To follow on from the trade fairs Waters also helped arrange journalist visits which for many respondents was the most significant activity (W1/2/6/9). “In five years Madeleine brought thirty journalists and before... no one came to Lebanon” (W2). This was described as a “game-changer” and a factor that created “mini ambassadors” who continue to be supportive today, such as Tim Atkin or Anthony Bourdain (W6/PR1/BM1). More wineries including Musar and Massaya took part in these visits to give visitors a broad impression of producers and regions. By using these economies of scale they could fund together an activity which would have been too costly for any individual producer to achieve.

### **Summary**

These joint activities were an important step to become a true territorial brand on the international market. Through joint activity the wineries were able to present themselves with impact and scale to the UK market. It was important that they utilised a local expert who could guide them in the appropriate style of presentation and offer vital contacts. Two sources in the literature review suggests there was a rise in exports after this activity. A Coco PR press release compiled with government data, showed a 33% increase in export to the UK from 2012-13 (Appendix 12). The absence of some wineries in this activity did dilute the potential impact of the campaign but there were enough to give it sufficient scale in a consumer’s mind.

## **6.6 Joint Initiatives**

In Porter's "Clusters and New Economics of Competition" he emphasises the strongest geographic clusters increase productivity "sourcing inputs, accessing information, technology and needed institutions"<sup>45</sup> as a unit.

### **6.6.1 Research & Development**

Joint research in Lebanon would help wineries to better understand their terroir and adapt viticulture methods to their special climate. In addition, archaeological research could reassert the heritage of wine-making. Lack of funding has prohibited any large scale activity, despite this being one of the main aims of the UVL when it was set up. The OIV supported a project to analyse and register their native vines like Obeideh (W1/7). Since the National Institute of Wine and Vine was established in 2013 a monthly technical committee has formed with seven oenologists from wineries attending. Several wineries showed enthusiasm towards the potential of this committee to progress terroir studies and start to draw up a guide for an appellation system (W1/2/5/7).

As referenced in the literature review there are institutions currently sitting outside the UVL that perform research for the industry. Such as ECLIM (Euro-Lebanese Centre for Industrial Modernisation) that conducted a small scale study on terroir for the industry (W1). To perform as an efficient cluster, the Lebanese wine industry should pool these resources and co-ordinate activities.

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<sup>45</sup> Porter (1998) p81

### **6.6.2 Resource Management**

Examples in Porter's study showed that clusters benefit from having local resources that support their industry with raw materials or complementary functions<sup>46</sup>. This is not true for Lebanon, since the wine industry is too small for supporting businesses with specialist functions to be commercially viable. This means all the necessary raw materials and equipment are imported from Europe such as tanks, corks, yeast and enzymes (W3/10). During the 2006 hostilities with Israel when the Bekaa valley was bombed and imports were cut off, this left the wineries without vital ingredients prior to harvest. This led to wineries sharing equipment and materials to help each other (W3/4/10). Such co-operative action shows there is real potential for more resource sharing to drive mutual benefit in the future.

### **6.6.3 Innovation**

Porter states that clusters can enhance innovation as much as productivity<sup>47</sup>. This can happen in several ways; a formal experiment shared between companies, a factor of increased competition that encourages innovation to create individual advantage, or informal information sharing.

The very nature of attending committees and marketing events together helps facilitate this activity. A winery interviewed asserted that at the technical committee meetings "up to harvest we exchange ideas of what has happened to us" (W1). This was helpful during a recent harvest with unprecedented frost, at which time each winery shared their methods for dealing with it.

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<sup>46</sup> Porter (1998) p81

<sup>47</sup> Porter (1998) p83

The industry is not yet at a size where competition is encouraging further innovation. But this informal information sharing is an important factor that can help the industry in a situation where public funding is lacking.

## **Summary**

For an emerging industry to compete in a global market place the cluster offers a chance to increase productivity and create economies. There is evidence of an appetite for joint initiatives that has not yet come to fruition. Lack of government support does hinder progress. However, the informal information sharing networks are a good starting point. In the future more should be done to group resources in order to act efficiently. A good starting point could be joint buying of raw materials to help provide savings in cost price and shipping costs.

## **6.7 Effective Brand Management**

There are four potential spheres of influence highlighted under a territorial brand manager 1) control of the production process 2) control on volume 3) management of collective marketing 4) control of individual proprietary brand marketing<sup>48</sup>.

### **6.7.1 Michael Karam**

Michael Karam has acted as spokesperson for Wines of Lebanon UK since its inception. He started out as a business journalist based in Beirut, then in 2001 Tom Stevenson asked him to contribute a section on Lebanon to his "Wine

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<sup>48</sup> Charters, Menival and Mitchell (2011) p8

Encyclopaedia". From there, his role in wine writing continued and his book "Wines of Lebanon" (2005) won the Gourmand award for best New World Wine book.

Interviews with wineries have indicated he has taken on the position of brand manager in an informal capacity. From 2004-9 the UVL was experiencing discontent among members. A television documentary on Lebanese wine had been made that heavily featured the biggest three wineries leaving bad feeling amongst others (BM1).

Zafer Chaoui Chairman and CEO of Chateau Ksara asked Karam to help heal the rift (BM1/W6). It was at this time Karam encouraged wineries to consider the joint marketing activity with Wines of Lebanon UK and introduced Madeleine Waters as the potential PR consultant. Four of the wineries interviewed noted Karam's skills of diplomacy (W1/2/6/8). He was described as the "right celebrant, [a] good critic...[who] bonded them and they need that, they need a voice, when you have fifteen, or twenty wineries you need a moderator" (W6). Others mentioned his skill in presenting at trade fairs, and appreciation that "he speaks about the winery, each one's different style and different presentation" (W3).

At the same time, he is able to control the common mythology by presenting the story of Lebanon to consumers and has adapted it to incorporate elements of history and terroir, as well as the political backdrop (Appendix 11). He has been instrumental in pushing "brand Lebanon" and developing logos and brand imagery when many member wineries have been less interested in those aspects (PR1).

However, his informal status means his ability to influence is limited. Unlike a brand manager who is Director of a formal institution such as the CIVC, he cannot restrain an individual brand that acts in a way that may damage the territorial brand. He has no official budget and must rely on ad-hoc decisions by committee to conduct any marketing activity.

If the Wines of Lebanon UK was the most effective marketing activity to date, and Karam was instrumental in its evolution, this shows he was an influential brand manager under these limitations.

### **6.7.2 Madeleine Waters**

In a supporting role to Karam's brand ambassador, has been Waters of Coco PR. As referenced in the Joint Marketing Activity review, her experience and knowledge of the UK wine industry played a fundamental role.

Victoria Moore UK journalist supported this sentiment in her feedback "I felt Michael Karam's input was very valuable and that Madeleine had a very good understanding of what we needed as journalists" (Appendix 10).

### **Summary**

No formal brand manager role has existed for the Lebanese territorial brand. Nonetheless, there have been two figures who feature in this capacity and have been instrumental in advancing the brand since 2005. Karam had a significant impact on how the territorial brand has emerged. Without his instigation the generic campaign in the UK may never have taken place. His presentation style set a new

tone for the mythology and his diplomatic skills engaged wineries to gain momentum for their marketing activity.

Karam and Waters had an important synergy that created an effective campaign for Wines of Lebanon UK. Karam was better equipped to perform the role of diplomat with wineries and his Lebanese heritage gave him the credibility to present Lebanese wines. However, Waters had the connections to bring in the trade contacts and the knowledge to shape the campaign to work in the UK market. This indicates the skills required of a potential brand manager for an emerging region. This role has been limited by a lack of autonomy, with all decision-making made by the UVL committee. This meant Karam and Waters could only suggest and support the campaign, rather than manage or enforce decisions that would direct it in the most effective manner.

## **6.8 Sustained Action**

The wine world is a competitive global market place with many emerging wine regions vying for attention, particularly in the Eastern Mediterranean which has seen a revival of quality wine-making in regions like Greece, Turkey and Georgia. At ProWein trade fair 2016 there were over 6000 exhibitors from 57 countries<sup>49</sup>. In this environment it is important to not only create a territorial brand but to build it in people's mind through sustained action.

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<sup>49</sup> <https://www.thedrinksbusiness.com/2016/03/prowein-2016-all-you-need-to-know/>

### **6.8.1 Sustaining Activity**

Most wineries interviewed expressed a commitment to joint marketing activity (W1/2/3/8/9/10). There is an understanding that “you have to be patient. You are creating a brand, you are creating a name...Lacoste is not a brand of six months...especially in wine, because we have a lot of wines all over the world and you need time.” (W3).

However, those interviewed on the import market, refer back to the time of the Wines of Lebanon UK generic campaign from 2009-12 and note that they have heard less recently (I2/PR1/BM1/JR1). It could be that these comments reflect the fickle nature of the industry that easily shift focus to the next big thing. The presence at trade fairs that was a feature of the original campaign has continued. There have been fewer journalist visits, due to political instability, which is potentially one cause of this lessening awareness. To redress this, the campaign could take a new approach to marketing activity in order to reignite interest. For example, wine-maker dinners at top Lebanese restaurants in the export market with opinion formers from the trade.

### **6.8.2 Consumer and Trade Awareness**

As noted in the ZAWAQ guide (2013) “Even though Lebanon can claim to have some of the oldest vineyards its rebirth is recent. It still has a lot of work to do to evolve, grow, be recognised and appreciated”<sup>50</sup>. It does appear that the work they are doing is starting to resonate with consumers. Several wineries note a shift in reaction from trade visitors to fairs (W1/2/3). A typical comment from a winery was four years ago they would hear “Ah Lebanese wine? What is this? I don’t know....”,

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<sup>50</sup> Rozelier (2013) p31

and now they hear “Ah, I tried [an]other Lebanese wine, I will [now] try your wine” (W3). Retailers and importers also note a shift saying “it is no longer just Chateau Musar, it is now common to see Lebanese wines on lists of better restaurants; particularly those with high end Middle Eastern cuisine” (R1). The role of the territorial brand is to build on this momentum to a point when seeing a Lebanese wine is no longer a surprise or novelty.

### **6.8.3 Political Disruption**

Although the civil war ended in 1990 there have been several phases of political disruption that have created obstacles for the wine trade to thrive. In the aftermath of civil war Syrian forces were still present in the Bekaa Valley. Furthermore, there were two later periods of bombardment with Israeli intervention; in 1996 operation “Grapes of Wrath” and in 2006 following Hezbollah’s kidnap of two Israeli soldiers. Lately the Syrian Civil War is creating another point of tension with a flood of one million refugees into the Bekaa Valley. In 2006 a big anniversary event at Chateau Ksara and other journalist visits had to be cancelled. Under these circumstances it will take longer for a territorial brand to evolve. However, there is notable pride from wineries that they can continue to make wine under these adverse conditions. This creates a unifying atmosphere and some refer to a “need for co-operation” (W3) or “need for optimism” (W8). This can explain why this particular region has been galvanised to work effectively together, when many respondents noted this is not a natural attribute of their culture (W3/W6/BM1). It offers an interesting contrast to the lack of co-ordinated activity in similar Mediterranean country like Greece.

## **Summary**

Most strong territorial brands have existed for decades or centuries and gradually infiltrated into the consumer consciousness. The Lebanese territorial brand is in its infancy but showing promising signs of growing awareness. However, it needs to continue to assert its position on the crowded market place and develop new methods to attract attention. The industry faces adverse political conditions which disrupts their activity but also creates a spirit of unity that can be used to their advantage.

## **7. Conclusions**

Lebanon is a good example to other emerging regions of the benefits that can be derived from working collectively to gain exposure and build sales in the export market. It is still at the early stage of its evolution as a territorial brand and has many improvements it needs to make in order to establish itself as a credible winemaking region.

Through the help of pioneers in its early stages, Lebanon made impressive attempts to build the infrastructure that would provide it with a good base to develop the industry in the shape of the UVL. The political backdrop and lack of government support hindered them from fully benefitting from these actions. However, it will provide a good framework for future development. They now need to refocus this institution with a clear mission statement and quality charter backed up by legally binding production regulations. The aim should be to have one hundred percent winery membership and to continue to lobby the government to support and fund their growth.

This also provides a lesson to other countries that government backing, public funding and legally enforced institutions are critical elements for an effective territorial brand.

In addition, their identity and mythology need to be consistently delivered by member brands. Lebanon is still developing its territorial identity. It suffers a unique problem of having a single iconic brand, Chateau Musar, that was able to establish itself on

the market before others and has left a strong mark in consumer's mind of what to expect from this region. This image is divergent from the reality, therefore the role of the territorial brand must be to break away from this brand image, to establish a new and longer lasting impression of their collective brand. To do this, they must develop wines with a cohesion in style and packaging that will act as clear purchasing cues to consumers. Emerging regions act as a high risk purchase for consumers, therefore their brand identity must provide reassurance to consumers of the quality and authenticity of their brand. In the case of Lebanon this will mean they need to reassert their heritage as a wine region and the quality of their terroir, whilst avoiding reliance on the gimmick of its turbulent political history. These elements need to form the common mythology they share with consumers.

Particular strategies were most effective for Lebanon. The growth in exports in the UK market between 2012 and 2013 appears a direct result of the Wines of Lebanon UK campaign. This marketing activity made use of multiple elements from trade fairs, consumer events and journalists trips to wineries. The use of consultants with marketing expertise, and a brand manager not directly involved with one winery, helped legitimise their campaign. If these figures are given more autonomy in the future, they could manage these campaigns more efficiently for the common good. Furthermore, they need to continue to develop their activity to ensure they remain present in the mind of trade, journalists and consumers in the export market.

Finally, as a small wine producing region with high input costs the industry faces a challenge to offer a commercially attractive proposition to the export market. Better use of cluster resources through co-operation and joint activity will help the industry

grow more efficiently and address these challenges. This will help them become an emerging region more likely to succeed on the global market place.

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