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**[*INSERT YOUR LOGO*]**

[*Business name*]

*[Location]*

*[Postal address]*

*[Export contact name]*

*[Position/title]*

*[Telephone number]*

*[Email]*

*[Website URL]*

**ABN:** [*ABN*]

**ACN:** [*ACN*]

[*Business name*]

Export plan

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# Export plan summary

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## Executive summary

This should be a maximum of half a page.

The key issues to address are the business’ reasons for exporting and your overall objectives in entering overseas markets.

Objectives could include:

* Grow sales volume beyond limitations of domestic market
* Improve performance and/or distribution security in export markets
* Fulfil requests from third parties for private label (OEM) wines
* Sales market for lifestyle reasons
* Catch up vintages, reduce working capital or generate cash flow
* Sell excess inventory of branded wine
* New markets to accommodate a production expansion or diversification
* Optimise markets/portfolio for profitability, sustainability and risk
* Fulfil unsolicited sales orders
* Other:

## Export capability

**Date established:** Insert the date you started trading.

**Relevant experience:** Briefly outline your experience and/or years in the industry and any major achievements/awards.

**Products/wines:** What product ranges are you selling? What is the anticipated demand for your products/services in export markets?

**Unique selling proposition**: What makes your wines stand out from the competition?

**Production potential:** How much of the winery’s current production potential is currently utilised?

**Laws and regulations:** List all the licences or permits you have registered or will need to comply with to export your wine to your chosen markets.

Learn more about assessing your export capability and capacity à

# Risk management

## SWOT analysis

List your business’ strengths, weaknesses, opportunities and threats in the table below, then outline how you plan to address them.

| **Strengths** | **Weaknesses** |
| --- | --- |
| e.g.  Experience (particularly in new markets)  Production capacity  People and culture  Financial reserves  Value proposition  Digital channels  Price, value, quality  Reputation  Strong relationships through supply chain | e.g.  Gap in capabilities (e.g. stock levels)  Limited capacity to scale production  Cash flow  Low profit margin  Suppliers  Lack of resources and experience  Causes of lost sales  Minimal brand awareness  New labelling required |

| **Opportunities** | **Threats** |
| --- | --- |
| e.g.  New customer segments  Competitor weakness  Industry trends  Grants and support programs  New wine products  New innovations  Key partnerships | e.g.  Pandemic  Shipping and logistical issues  Competitor actions  Changing political landscape  Environmental effects  Loss of key staff  Market demand (versus domestic demand) |

## 

## Risk management plan

List the potential risks and mitigation strategies. We’ve included some common examples.

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk** | **Rating** | **Consequences** | **Management** |
| Add risk |  |  |  |
| Add risk |  |  |  |
| Australian dollar appreciates against target currency | **High** | Significant financial risk resulting in loss of profit margin | Negotiate with distributors the terms of exchange-rate fluctuations. This is often settled by sharing the risk. |
| Not doing enough research to fully understand market access, registration and regulatory hurdles | **Medium** | Failure to understand costs of entry into new markets can blow predicted budget | Conduct due diligence before entering new markets and hire individuals (or train existing staff) with market experience |
| Legal regulations becoming an export issue | **Medium** | Frequent changing and different import/export laws may cause importation issues | Be fully aware of country import laws and, where necessary, have legal advisor at the ready |
| Delivering goods and not receiving payment | **Medium** | Debtors are much harder to chase when overseas, resulting in significant product and financial loss | Ensure any contractual agreements are with reliable people. Credit check customers, importers, etc. prior to any engagement |
| Political issues in market region | **Variable by country** | Product not capable of being imported. Protectionism for local producers. | Be aware of foreign policies and political landscape. Change marketing tactics accordingly and take steps to prevent loss of business and investment. |
| Quoting incorrect Incoterms | **Medium** | Can lead to further costs and delays while transaction with importer is complete | Fully understand Incoterms in order to avoid expensive mistakes |
| Bribery, graft and corruption causing reputational damage | **Variable by country** | Brand reputation tarnished by having products imitated and sold in the export market | Ensure all IP and trademark protection is in order and can be in effect within relevant market |
| Claim or penalties for trademark infringement | **Medium** | Costly legal proceedings or potential damages including seizure, inspection and recall of goods | Do due diligence to ensure you’re not infringing a registered trademark |
| Compliance not being met | **Medium** | Products can be sent back or disposed of in-country, resulting in financial loss | Keep up to date with relevant regulations (via market guides) and ensure compliance before exporting |
| Country environment making import difficult | **Variable by country** | Wine is incapable of being imported because of the country’s environment | Conduct analysis of political, legal, social, technological and environmental states when selecting markets |
| Mismanaged transportation and logistics | **Low** | Risk of theft, damage or goods not arriving at their destination  Product spoilage due to incorrect storage | Ensure contracts fully underline the circumstances surrounding product manipulation. Always have business insurance. |

Learn more about assessing your risk management à

**Export markets**

Market analysis

### Market insights and performance

A summary of key indicators and trends, and their relevance to your export offering.

* What recent trends have emerged in the market? Is there a growth in GDP, gaps in the market, a decline in a competitor's market share?
* What’s the average wine price per bottle; what’s the o-n versus off-premise consumption; wine share compared to total alcohol market, etc.
* What growth potential is available? What is the anticipated percentage growth of the product in the future?
* Is there a large key demographic that aligns with your brand?

**Competitor analysis**

A summary of the competitive landscape. Consider addressing the factors below.

* The competition structure of the market and whether it's concentrated or fragmented
* Who the main market players are
* Competitors’ size, growth, ownership and leadership
* Market share of competitors
* How similar wines perform in the market
* How saturated the market is with similar wines
* Relevant price points
* If the market is open to newcomers
* How your competitors distribute their wine
* Where your target consumers buy similar wine in your target market
* Where there are gaps in the market
* How you plan to differentiate yourself.

**Customer profile**

An overview of your target customer. Consider addressing the following.

* Demographics (age, gender, location, income)
* Wine buying habits (regularity of wine purchases – weekly, fortnightly, etc.)
* Preferred price range (low-cost, premium, etc.)
* Online behaviour (particularly if you plan to market your wine through online and social media channels)
* Offline channel interactions (e.g. how often do they visit bottle shops?)
* Customer loyalty (repeat buyers)
* What attracts them to wine (wine style, region, labels/bottle, premium price, brand story, etc).

**Market access**

* What is the ease or difficulty in operating in that market (high level restrictions or an open economy)?

List the regulations that will have some impact on the running of your export business. For example: international legislations, tariffs, duties and taxes, as well as wine standards, labelling and certification requirements.

Learn more about evaluating export markets à

Wines/ranges suitable for export

|  |  |  |  |
| --- | --- | --- | --- |
| **Product** | **Market position** | **Modifications required** | **Price** |
| Wine/range | Where does your wine fit in the market? | Include changes required to make it suitable for export  (i.e. labelling, branding, packaging, etc.) | Include the price |
|  |  |  |  |
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Unique selling proposition (USP)

A statement that clearly communicates what differentiates you from the competition.

Learn how to write a USP à

Export pricing strategy

Your export costs, pricing strategy and pricing structure. How will you make your exports profitable?

Learn more about setting export prices à

## Channel strategy

### Key buyers

Identify your key customers. This is likely to be in the form of a wholesaler, distributor, agent, broker, licensee or direct to consumer depending on your business model and the local market requirements.

Some businesses also sell across vertical channels, in which case you need to identify each of those channels along with the end user.

### Sales & distribution channels

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Channel type** | **Wines/ranges** | **% of sales** | **Advantages** | **Disadvantages** | |
| e.g. distributor; eCommerce | List products sold via this channel | Expected sales | What advantages are there to using this channel? | What challenges do you expect? How will you overcome them? | |
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Learn more about routes to market à

### Marketing and advertising plan

* What strategies do you have for promoting and advertising your wines in the next 12 months?
* Do you need to modify your marketing channels and materials to suit international markets?
* What have you agreed on with your trade partners? What marketing support do they need to help reach your sales targets?

|  |  |  |  |
| --- | --- | --- | --- |
| **Channel** | **Tactic and expected business outcome** | **Cost ($)** | **Target date** |
| Print media advertising, online advertising, trade show, on-prem collateral, media release, social media campaign, tasting event, etc. | What activity is required? How do you expect it will improve your business success? | $ | Month/  Year |
|  |  |  |  |
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## Management and implementation plan

Outline your business structure. Who will be responsible for managing and overseeing the development and implementation of your export strategy?

### Management and ownership of export activities:

* Who will be running the export business?
* How will senior management and areas of the business help implement the export plan? Outline their role in the business, the strengths of each employee involved in the export side of your business.

**Experience:**

* What relevant experience do the business owners and key personnel have?
* List current staff with relevant qualifications and the percentage of time allocated to export activities. If current staff are not adequately skilled, then outline the required training below.

### Training and support

* What training is needed to fill knowledge and experience gaps?
* Do you need external support, from export consultants or other?
* What will this cost and is training readily accessible?

### Production capacity

Provide details of your spare production or stock capacity. How do you plan to increase capacity to meet potential sales? What product changes are required, such as labelling, packaging or other? How will this impact production?

### Freight and logistics

Provide details of how you will get the goods to the buyer.

* Do you need any special export documentation to accompany the goods (i.e. certificates of origin)?
* Does the partner have their own freight forwarding agent that they work with or do you need to find one for yourself?
* Is any special packaging needed to meet export requirements?
* Have you discussed Incoterms with the buyer and do you understand your obligations associated with the agreed terms?

Learn more about shipping wine à

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### Payment methods accepted

Provide details of the payment methods and terms you’ll accept.

Learn more about payment methods à

### 

### Intellectual property protection

List any current trademarks you have registered and for which international markets.

Learn more about IP protection à

### 

### Insurance details

|  |  |
| --- | --- |
| **Professional indemnity** | Provide details, if applicable. |
| **Product liability** | Provide details, if applicable. |
| **Business assets** | Provide details, if applicable. |
| **Business revenue** | Provide details, if applicable. |

## The finances

### Key objectives & financial review

**Financial objectives**

List your key financial objectives.

These can be in the form of sales or profit targets. You could also list your main financial management goals such as cost reduction targets. Clearly disclose if these are expected figures or estimates.

**Finance required**

* How much upfront money do you need?
* Where will you get the funds?
* What portion will you be seeking from loans, investors, business partners, friends or relatives, venture capital or government funding?
* How much of your own money are you contributing towards the business?
* When applying for bank loans and government grants, you’ll need to work closely with an accountant to supply financial statements to support your application.

Learn more about export grants and finance à

## Supporting documentation

Attached is my supporting documentation in relation to this export plan. The attached documents include:

* List all of your attachments here, e.g.
* Export costs spreadsheet
* Export pricing spreadsheet
* Balance Sheet
* Profit & Loss Statement
* Break even analysis
* Other