



Technical University of Moldova

**GLOBAL WINE CONJUNCTURE AND FUTURE
STRATEGIC MARKETING ARCHITECTURE FOR
MOLDOVAN WINE**

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Aurelia LITVIN

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**MINISTERUL EDUCAȚIEI ȘI CERCETĂRII AL REPUBLICII
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**CONJUNCTURA GLOBALĂ A PIEȚEI VINULUI ȘI VIITOAREA
ARHITECTURĂ DE MARKETING STRATEGIC PENTRU VINUL
MOLDOVENESC**

Teză de MBA Management în Agrobusiness

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ANNOTATION

to the MBA Management in Agribusiness thesis “Global Wine Conjuncture and Future Strategic Marketing Architecture for Moldovan Wine”, developed by Diana Lazăr

Structure: introduction, three chapters (nine subchapters), general conclusions and recommendations, bibliography of 139 titles, seven annexes; 46 tables and 11 figures.

Keywords: wine sector, strategic marketing, umbrella brand, collective reputation, premiumisation.

The problem. World wine consumption has fallen to about 208 million hectolitres, the lowest level since 1957, and value is migrating towards bottled, sparkling and premium segments. Moldova has completed its geographic reorientation — the CIS share of export value fell from 79.2 to 24.3 percent between 2006 and 2025, Europe now generates three fifths of value — but the value transition has not followed: the HS 2204 unit value of 1.51 USD per litre is 37.6 percent of the world average, bulk still represents 58.4 percent of volume, and destination concentration is rising again (HHI 879 in 2021, 1,281 in 2025).

Purpose and objectives. The thesis designs an integrated strategic marketing architecture that converts this reorientation into sustained value creation under the Wine of Moldova umbrella brand, by systematising the theory of global conjuncture, country branding and collective reputation; diagnosing 2015–2025 export performance on reconciled statistics; quantifying the value gap, concentration and volatility; evaluating the institutional and financing architecture; and designing markets, portfolio, price corridors, financing and governance.

Methods: reconciliation of national and international trade statistics (ONVV, UN Comtrade, OIV); decomposition of export growth into volume, price and structural effects; measurement of market concentration and of the growth–volatility profile of destinations; PESTEL, five-forces and SWOT/TOWS analyses; price corridors derived backwards from retail shelf prices; budget scenario modelling.

Novelty and results. Moldovan wine still sells at just 37.6 percent of the world average price, up only modestly despite recent gains, while Georgia, starting from a comparable base, has shown that origin alone need not cap value; the conjuncture of recent years now demands a smarter, not merely bigger, response. This is the novelty the thesis proposes: the Wine of Moldova Integrated Marketing Architecture (WIMA), which concentrates effort on four focus, three prestige and three watch markets instead of thirteen; replaces unverifiable consumer segments with an auditable price-tier portfolio, migrating packaged exports from 1.76 to 2.70 euro per litre FCA; sequences three Vine and Wine Fund financing scenarios — reallocation, consolidation, value-related contribution — without external grants; and assigns responsibilities through an extended RACI matrix.

Applicative value. Directly usable by the Ministry of Agriculture and Food Industry, the National Office for Vine and Wine, producer associations and public authorities in the 2026–2030 programming cycle.

ADNOTARE

la teza de MBA Management în agrobusiness „Global Wine Conjuncture and Future Strategic Marketing Architecture for Moldovan Wine”, elaborată de Diana Lazăr

Structura: introducere, trei capitole (nouă subcapitole), concluzii generale și recomandări, bibliografie din 139 de titluri, șapte anexe; 46 de tabele și 11 figuri.

Cuvinte-cheie: sector vitivinicol, marketing strategic, brand-umbrelă, reputație colectivă, premiumizare.

Problema. Consumul mondial de vin a coborât la circa 208 milioane hectolitri, minimul din 1957, iar valoarea migrează spre segmentele îmbuteliat, spumant și premium. Moldova și-a încheiat reorientarea geografică — ponderea CSI în valoarea exporturilor a scăzut de la 79,2 la 24,3 % între 2006 și 2025, Europa generează acum trei cincimi din valoare —, dar tranziția spre valoare nu a urmat: prețul unitar HS 2204 de 1,51 USD/l reprezintă 37,6 % din media mondială, vrac-ul deține încă 58,4 % din volum, iar concentrarea destinațiilor crește din nou (HHI 879 în 2021, 1 281 în 2025).

Scopul și obiectivele. Teza proiectează o arhitectură integrată de marketing strategic care să transforme această reorientare în creare durabilă de valoare sub brandul-umbrelă Wine of Moldova, prin: sistematizarea teoriei conjuncturii globale, a brandingului de țară și a reputației colective; diagnosticul performanței la export 2015–2025 pe statistici reconciliate; cuantificarea decalajului de valoare, a concentrării și a volatilității; evaluarea arhitecturii instituționale și de finanțare; proiectarea piețelor, portofoliului, coridoarelor de preț, finanțării și guvernantei.

Metode: reconcilierea statisticilor comerciale naționale și internaționale (ONVV, UN Comtrade, OIV); descompunerea creșterii exporturilor în efecte de volum, preț și structură; măsurarea concentrării piețelor și a profilului creștere-volatilitate al destinațiilor; analize PESTEL, cinci forțe și SWOT/TOWS; coridoare de preț derivate invers din prețurile de raft; modelarea scenariilor bugetare.

Noutatea și rezultatele. Vinul moldovenesc se vinde încă la doar 37,6% din prețul mediu mondial, în ușoară creștere, dar insuficient, în timp ce Georgia, pornind de la o bază comparabilă, a demonstrat că originea nu limitează valoarea; conjunctura ultimilor ani impune acum o abordare mai inteligentă, nu doar mai amplă. Aceasta este noutatea propusă de teză: Arhitectura Integrată de Marketing Wine of Moldova (WIMA), care concentrează efortul pe patru piețe-focus, trei de prestigiu și trei de veghe, în loc de treisprezece; înlocuiește segmentele neverificabile de consumatori cu un portofoliu auditabil pe niveluri de preț, migrând exporturile îmbuteliat de la 1,76 la 2,70 euro/litru FCA; secvențiază trei scenarii de finanțare în Fondul Viei și Vinului — realocare, consolidare, contribuție legată de valoare — fără granturi externe; și fixează responsabilitățile printr-o matrice RACI extinsă.

Valoarea aplicativă. Direct utilizabilă de Ministerul Agriculturii și Industriei Alimentare și de Oficiul Național al Viei și Vinului, asociațiile de producători și autoritățile publice în ciclul de programare 2026–2030.

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INTRODUCTION

The actuality and importance of the topic. The global wine market is undergoing the deepest structural transformation of the post-war period. World consumption fell to approximately 208 million hectolitres in 2025 — the lowest level since 1957 and 2.7 percent below the previous year — while the value of international trade has proved considerably more resilient than its volume. The market is therefore not disappearing; it is repricing. Value is migrating towards bottled wine, sparkling wine and branded premium segments, while the bulk and entry-price segments absorb most of the volumetric contraction. For producing countries whose export model rests on volume, this conjuncture is a structural threat; for those able to reposition their portfolio towards value, it is an opportunity that arises at most once in a generation.

Few economies are as exposed to this transformation as the Republic of Moldova, for which wine is the emblematic export industry: before the embargo of 2006 the sector generated approximately nine percent of gross domestic product, and its economic, social and reputational significance remains without equivalent among the country's industries. Following the embargoes of 2006 and 2013, the sector accomplished a geographic reorientation that international wine criticism itself has described as a "*revolution*", technologically modern wineries emerging within a landscape otherwise little changed, exports reaching fifty-eight destination markets on the consolidated perimeter in 2025, European markets absorbing three fifths of export value. The present author's own professional trajectory intersects this episode directly, authoring the wine sector's founding White Paper in 2010 [59] and shaped the institutional design that followed. Yet the revolution reoriented the sector's geography without completing its value transition, and the momentum it generated has since plateaued: the average unit value reached only 1.51 dollars per liter in 2025 — 37.6 percent of the world average, against 2.98 dollars realized by Georgia, an origin with a comparable inheritance — while bulk shipments still account for 58.4 percent of exported volume and the collective marketing budget has stagnated in nominal terms since 2022. Reorientation has been completed; the boost that carried it has run its course; value creation has not followed, and it will not follow from more of the same.

The timing of the inquiry follows directly from this plateau. The Republic of Moldova is negotiating accession to the European Union, a process that will progressively expose the sector to the most competitive wine market in the world while opening access to its policy instruments. The institutional architecture created by the sectoral reform of 2011–2013 — the National Office for Vine and Wine, the Vine and Wine Fund and the umbrella brand Wine of Moldova — has reached institutional maturity and now needs not a larger version of its first cycle but a more deliberate one. In particular, the sector's instinctive reflex toward geographical indications and

appellations of origin, while a legitimate and necessary layer of quality verification, cannot alone carry this second cycle: such instruments presently cover a small fraction of exported volume and evolve through slow administrative procedure, ill-suited to the pace international retail requires. A tailored, market-driven approach, organized around a collectively governed trademark capable of consumer-facing communication, price discipline and rapid adaptation, rather than around certification alone, is the strategic marketing architecture this thesis sets out to substantiate and design.

The purpose of the research is to design an integrated strategic marketing architecture for the Moldovan wine sector that converts the completed geographic reorientation of exports into sustained value creation, measurable through the average unit value of packaged exports and the structure of the export portfolio under the Wine of Moldova umbrella brand.

In order to achieve this purpose, the following objectives are formulated: first, to systematise the theoretical frameworks relevant to the problem — the conjuncture of global commodity and wine markets, market orientation, segmentation–targeting–positioning, country branding and the country-of-origin effect, collective reputation, geographical indications and integrated marketing communication; second, to diagnose the export performance of the sector for the period 2015–2025 on the basis of reconciled statistical sources, including mirror data; third, to quantify the value-added deficit, the concentration of destinations and the growth–volatility profile of strategic markets; fourth, to evaluate the productive base and the institutional and financing architecture of the sector, including the budgets of the National Office for Vine and Wine for 2016–2026; fifth, to benchmark the promotion and financing systems of competing wine-producing countries; sixth, to design the integrated market–portfolio architecture, the reverse-engineered price corridors, the activation funnel, the financing scenarios and the governance and performance-management model; and seventh, to formulate the implementation roadmap together with its risks and mitigation measures.

The object of the research is the wine sector of the Republic of Moldova, examined through its export performance, productive base and institutional architecture. **The subject of the research** is the strategic marketing architecture through which the collective resources of the sector — the umbrella brand, the geographical indications, the Vine and Wine Fund and the associated governance rights — can be organised for value creation on external markets.

The research hypotheses are formulated as follows. The first hypothesis states that the export underperformance of the Moldovan wine sector is structural rather than conjunctural: it originates in the composition of the export portfolio and in price positioning, and therefore persists even under favourable demand conditions on destination markets. The second hypothesis states

that the unit-value gap relative to the world average is attributable primarily to the share of bulk shipments and to the positioning of packaged wine in entry-price corridors, and not to the intrinsic quality of the product, which international competition results contradict. The third hypothesis states that a collectively governed umbrella-brand architecture — combining tiered portfolio discipline, price corridors derived from verified retail conditions and a binding quality covenant — can shift the centre of gravity of packaged exports towards the accessible-premium corridor. The fourth hypothesis states that the financing required by such an architecture is attainable within the existing legal mechanism of the Vine and Wine Fund, through reallocation and a value-related component of the contribution, without recourse to external grants.

The methodology of the research combines instruments of statistical diagnosis with instruments of strategic design. The diagnostic apparatus includes the reconciliation of national and international data sources with explicit treatment of nomenclature perimeters and mirror discrepancies; the decomposition of export dynamics into volume, price and interaction effects; constant-market-share analysis; the Balassa index of revealed comparative advantage; concentration measurement through CR3, CR5, CR10 and the Herfindahl–Hirschman Index; and a growth–volatility screening of destination markets inspired by portfolio theory. The structural diagnosis is organised through PESTEL analysis, the five-forces framework and a quantified SWOT with TOWS derivation. The design apparatus includes reverse-engineered pricing waterfalls constructed from statutory fiscal parameters and published channel studies, international benchmarking of promotion agencies, scenario modelling of the financing envelope and an extended responsibility-assignment matrix for governance. The information base comprises the statistics of the National Bureau of Statistics, the United Nations Comtrade database including partner mirror data, the reports of the International Organisation of Vine and Wine, the export reports and budgets of the National Office for Vine and Wine, the state budget laws of the Republic of Moldova, and international market research. The reference period is 2015–2025, extended with the first half of 2026 where data permit.

The scientific novelty and originality of the work lie in the integrated architecture itself. The thesis binds statistical, institutional and marketing instruments, each well-established individually in the literature, into a single, continuous analytical chain running from market evidence through segmentation and pricing to financing and governance, with strategic design flowing directly from diagnosis rather than standing apart from it, a synthesis not previously constructed at this level of operational detail for the Moldovan wine sector. The design starts free of preconceived segments and fixed assumptions about the consumer, building an auditable price-tier architecture directly from a systemic, multi-dimensional analysis of demand, channel and price

evidence, and letting the search for optimal positioning follow where that evidence leads. The result is a complete contribution: a marketing architecture that holds product, brand, market, pricing, finance and governance together within one coherent strategic framework, one that can be tailored specifically to Moldovan wine and carried forward as the sector's next strategic advance.

The applicative value of the work resides in the fact that its outputs — the market-role taxonomy, the price corridors for the focus markets, the activation funnel with conversion indicators, the financing scenarios, the key-performance-indicator dashboard and the extended responsibility-assignment matrix, are formulated at the level of operational detail required for adoption by the National Office for Vine and Wine, the producer associations and the public authorities within the programming cycle 2026–2030.

The structure of the thesis follows the logic of the argument. Chapter 1 constructs the theoretical foundations: the conjuncture of the global wine market, the strategic marketing frameworks applicable to the wine industry, and the economics of country branding, collective reputation and geographical indications, closing with six conclusions that discipline the empirical and strategic analysis. Chapter 2 delivers the diagnosis: the methodological framework and data reconciliation, the evolution and decomposition of export performance, the productive and institutional foundations of the value transition, and the strategic synthesis through PESTEL, five-forces and SWOT–TOWS analysis. Chapter 3 converts the diagnosis into design: the integrated market–portfolio architecture under the Wine of Moldova umbrella brand, the segment–channel activation with price corridors for the focus markets, and the financing, governance and performance-management system, closing with the implementation roadmap and its risks. The general conclusions synthesise the findings, verify the research hypotheses and formulate recommendations addressed to the sectoral institutions. The thesis ends with the bibliography and seven annexes that document the data universes, the analytical matrices in full form, the complete ranking of destination markets and the extended governance matrix.

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