

Chinese Liquors as global brands - Guizhou Moutai Group case study

ABSTRACT:

China is one of the largest markets in the world for alcoholic beverages. The Chinese liquor industry is over 5,000 years old, reflecting traditional Chinese cultural values. Improving the international competitiveness of Chinese liquor can be the key to promoting the export of Chinese liquor. In recent years, the “Belt and Road Initiative (BRI)” policy and the in-depth implementation of the comprehensive opening-up strategy have brought opportunities for the international development of Chinese liquor to strengthen cultural promotion, establish a strong brand effect, and embark on the path to global market opening. The Chinese liquor industry has now entered the “brand” competition stage after experiencing competition from “quantity” to “quality”. In terms of internationalization, the Chinese liquor industry lacks internationally recognized brands, and Chinese liquor branding is obsessed with cultural appeal and a single consumer group structure, making it difficult to open up international markets. The promotion of the international competitiveness of Chinese liquor requires joint efforts of the national government, industry associations, and enterprises. Two Chinese brands, Moutai and Wuliangye, are among the best-selling luxury liquors worldwide. It will also help to accelerate the break-up of the Chinese liquor industry’s over-reliance on the domestic market. As a leading enterprise in Guizhou Province, Guizhou Maotai Group has played a dominant role in the province’s economic prosperity as well as solving local employment problems and improving people’s living standards at the same time. The Guizhou Maotai Group should implement a multinational strategy that focuses on cost reduction and product diversification to simultaneously achieve low-cost advantages and product differentiation advantages. According to the author’s assumption, after analysing the running business processes of this company and the lessons learned from them, these facts can serve as a good reference example for the other stakeholders in the Chinese liquor industry, contributing to an understanding of some critical factors that influenced decision-making on how Chinese liquors could become globally recognized brands.

In this context, this review paper discusses the main trends of the Chinese liquor industry via a Guizhou Maotai Group case study in order to reveal and understand the main challenges that lie ahead and concludes several recommendations on how to overcome the difficulties on the way to transforming Moutai liquors into widely known, respected global brands. Further research work should be implemented to determine how to generalize these conclusions for the entire sector.

Keywords: Chinese liquor, Moutai, cultural differences, brand value, brand positioning, quality aspects

INTRODUCTION

The efficient growth of the liquor industry in the last decade has been achieved by the majority of liquor enterprises, especially the famous liquor enterprises, seizing the opportunity to upgrade consumption by innovating, adjusting the product structure, changing the mode of growth, and improving profitability against the backdrop of China's rapid macroeconomic development. The development of the macro-economy has had a crucial impact on consumers' consumption preferences while pulling liquor consumption up a notch, and the consumption structure of China's residents has reached the inflection point of upgrading and is transitioning from basic consumption to enjoyment consumption, with people no longer buying and selling liquor. The rise in the liquor stock market in recent years can be seen as a long-term trend for the liquor industry, driven by enjoyment-oriented consumption¹.

Although the liquor industry is doing well in the country, dominating the liquor segment, active in the auction market and even dominating the annual CCTV prime resources advertising bidding sessions, this has not in any way promoted the export of liquor products. The 2011-2015 China Chinese liquor Market Investment Analysis and Forecast Report released by China Investment Consultant shows that although a number of domestic Chinese liquor brands have started their internationalization journey, Chinese liquor exports have obviously not achieved the expected results². Total liquor production in China from 2010-2016 showed a year-on-year upward trend, and from 2016 onwards total liquor production showed a year-on-year downward trend to 7.156 billion liters in 2021, down 3.39% year-on-year; 4.879 billion liters as of January-September 2022. as shown in Figure 1.

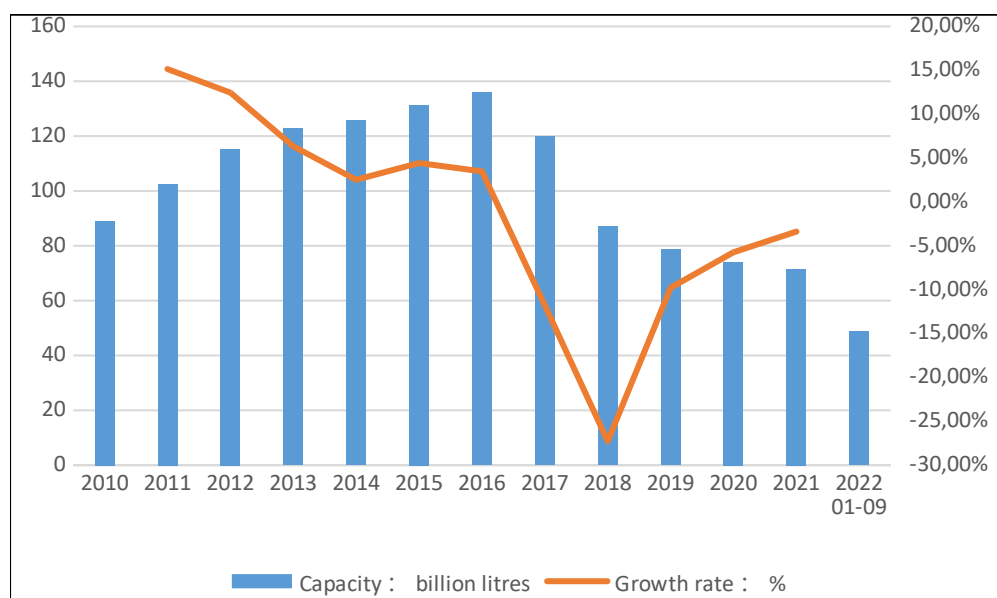


Figure 1. Chinese liquor production trend (2010-2022)

Source: Own edition based on³

From 2015 to 2019, the number of imports and exports of liquor products in China showed a slight upward trend. In 2021, the demand for liquor in China was 7.144 billion liters, down 3.41% year-on-year; from January to September 2022, the

demand for liquor in China was 4.879 billion liters, and the number of imports and exports of liquor products in China declined. At present, the current export situation of China's liquor industry is not optimistic, and overseas markets are yet to be developed. In the future, with the gradual increase in China's participation in international trade, coupled with the rising national affordability of high-priced

1 Xiaomin 2012

2 Wang et al. 2019

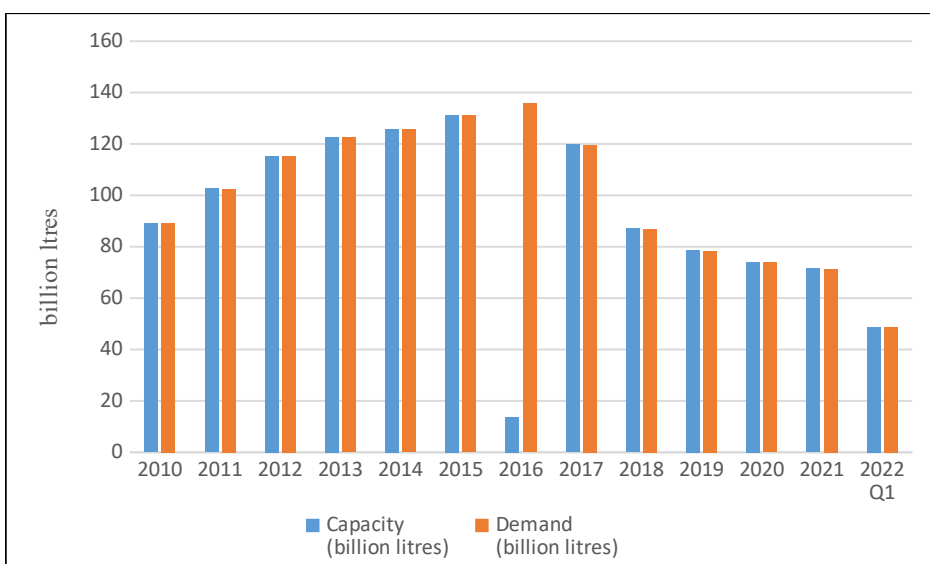
3 China Custom 2022; Chen et al. 2022

liquor and the steady demand for imported liquor, the import volume of the liquor industry will remain at a high level. According to customs data, from 2010 to 2019, China’s liquor in and out influenced the overall upward trend, while the epidemic influenced the overall downward trend in 2020. 2021 liquor imports amounted to 132,136,000 U.S. dollars, and exports amounted to 564,799,000 U.S. dollars. As of January–September 2022, China’s liquor imports amounted to US\$100,233,000, and China’s liquor exports amounted to US\$50,956,000. Figure 2 indicates evolution of supply and demand balance for liquors in China over more than a decade. In 2023, total volume consumption of spirits is expected to grow at a CAGR of 3%.

Figure 2: Supply and demand volume balance for liquor in China (in billionliters)

Source: Own edition based on⁴

According to China Customs data, China’s liquor in and out influenced the overall upward trend from 2010 to 2019, and the epidemic influenced the overall downward trend in 2020.2021 China liquor exports amounted to 16.017 million liters; China liquor imports amounted to 3.723 million liters; as of January-September 2022, China liquor exports amounted to 12.394 million liters, and Chinese liquor imports were 1.856 million liters as illustrated in Figure 3. below



⁴ China Custom 2022; Chen et al. 2022

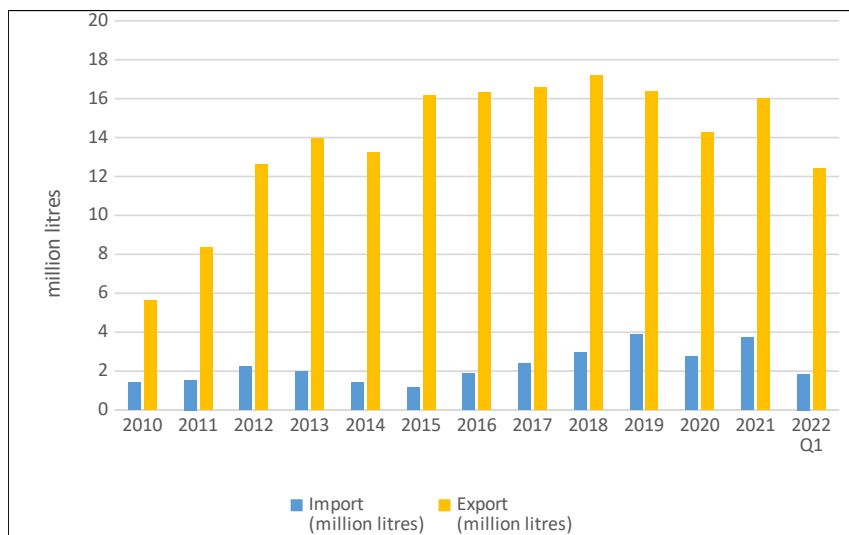


Figure 3: China liquor import and export volume statistics (in millionliters)

Source: Own edition based on⁵

At present, China's liquor exports are still just selling points, performance is more of a brand display role, foreign consumers of liquor consumption habits have not really cultivated. Of course, this is partly due to the vast differences in culture and consumption habits at home and abroad, and partly due to the lack of overseas marketing

talent in China. It is also worth noting that more of China's liquor exports are still geared towards overseas Chinese, and some companies are even promoting liquor exports back to China in order to avoid taxes. This also means that the current liquor export figures are still somewhat watery and do not yet give a pure indication of the performance of China's liquor in overseas markets⁶. There is still considerable potential for China's liquor to enter overseas markets, but of course, expanding overseas markets is not something that can be done in the short term; it requires the joint efforts of the government, companies and other parties. It is crucial to cultivate the overseas liquor consumer market, as only by allowing overseas consumers to truly understand liquor and experience and enjoy the culture can the door to the overseas liquor market be truly opened.

For "Moutai, Wuliangye" and other first-tier wine brands for international efforts, analysts believe that the first-tier wine brands in the domestic market gain incremental, inevitable outward expansion, and internationalization is also an instinctive outreach. From a competitive point of view, the first-tier wine "Moutai, Wuliangye" needs to establish an advantage in the international arena to establish brand dominance in the country, industry experts said. This is like some second- and third-tier brands: to play the regional market, we need to be the first in the provincial market to occupy the position, and to occupy the position in the provincial market, we need to form a brand communication advantage in the country. Therefore, from the perspective of brand dominance, it is necessary for famous wine companies to go international. For example, Moutai and Wuliangye have been expanding into international markets and have done a lot of work, which is what makes them better than other famous wine brands and enriches their own brands⁷.

However, it will take a long time for liquor to go international, as industry experts also point out that liquor is by its very nature a cultural carrier and is culturally oriented. Going international is bound to have a cultural collision, and it takes a long time to conquer or influence another culture with one, which needs to be combined with national strategies. In addition, it is the experience of the product. From this point of view, the significance of brand communication is greater than the significance of product sales, as famous wines such as Moutai and Wuliangye take the road to internationalization⁸.

5 Ibidem

6 Tiantian 2019; Tievuan 2019; Baoqun 2021

7 Hu 2007

8 Hao 2006; Liu and Dan 2018; Li 2018

INSIGHT INTO THE CHINESE LIQUOR INDUSTRY

ANCIENT TIMES

As one of the world's major distilled spirits, Chinese liquor is also a unique traditional spirit in China, and China was one of the first countries in the world to make wine. In the 10th century BC, during the Western Zhou Dynasty, the brewing industry had developed into a sizeable craft sector, and the state had an official position dedicated to brewing. The history of brewing technology in China has also seen a progression from cloudy wine to clear wine and then distillation into liquor. The traditional Chinese liquor dates back over 2000 years, with a significant evolution during the Qing Dynasty (1644-1912), when Chinese distillers introduced advanced and unique techniques for processing this unique type of liquor. In the early years of the founding of the state, local state distilleries were established in many regions on the basis of private distillery workshops, and the development of China's liquor industry entered a new phase in its history, with the traditional privately-run distillery workshops gradually evolving into large-scale industrial enterprises. Pilot studies on large-scale liquor production, characterized by the summation of traditional experience, were carried out across the country, and improvements to the mechanization of brewing were gradually carried out, completing the basic technical preparations for the development of the liquor industry on a larger scale. In terms of liquor branding, the state has conducted a number of famous liquor selections since 1952, which have resulted in the selection of such "famous Chinese liquor" products as Moutai, Wuliangye, Luzhou Laojiao, and Xifeng, and to a certain extent laid the foundation for the current pattern of the liquor industry. Moutai was the first Chinese liquor that was mass-produced. The Communist government consolidated a lot of local distilleries into one big, state-owned company, Kweichow Moutai (the name is an old romanization of "Guizhou Maotai"). This company is based in Guizhou Province, in south-western China, where liquor distilleries have a long history. However, under the planned economy, China's liquor industry developed at a relatively slow pace. China's liquor industry has developed rapidly and achieved great success since reform and opening up, particularly in the last 30 years. After a period of rapid development, the industry entered a period of adjustment in line with the national macroeconomic development cycle and relevant industrial policies⁹.

CONTEMPORARY EVOLUTION PROCESS OF CHINESE LIQUOR INDUSTRY

Time period 1985-1989

The supply of liquor in this period was far from sufficient to meet the consumer demand of Chinese residents. In order to resolve the contradiction between supply and demand, the state carried out reforms in accordance with the idea of "focusing on liberalization," constantly reducing price control and successively liberalizing the purchase and sale prices of most agricultural and sideline products, including some famous liquors, and the liquor industry entered a market-oriented pricing stage. Wuliangye and other liquor companies have shaped the image of high-end liquor by raising prices several times, and the first camp in the liquor industry has taken initial shape. At the same time, a number of famous liquor companies carried out capacity renovation and expansion projects against

9 Guizhou Maotai Group 2022; CNN Business 2018, Yumei 2013

the backdrop of rising prices that still exceeded demand, and the liquor industry achieved prosperous development¹⁰.

Time period 1989-1992

In order to curb the inflation that began to emerge in late 1988, the state began to “regulate and consolidate” the macro economy in 1989 and implemented a moderately tight monetary policy. During this period, the output of the liquor industry continued to grow at a low rate, but the growth rate dropped significantly and adjustments were first encountered. The period 1992-1997 was a period of rapid development, and in 1992, Comrade Deng Xiaoping’s “Southern Tour Talks” led to a new wave of reform and development, and the liquor industry entered a new period of rapid development. National liquor brands and regional liquor companies also developed well. At the same time, liquor companies began to focus on brand image and brand value in the competition, and investment in advertising and marketing increased significantly.

From 1998 to 2003

The period 1998–2003 was another period of adjustment, as the Asian financial crisis that broke out in 1997 made the liquor industry face greater operational challenges in the macro environment. At the same time, the state introduced a series of policies for the liquor industry, such as the introduction of a liquor production licensing system, the introduction of a compound excise tax on liquor based on price and volume, and the exclusion of pre-tax deductions for liquor advertising and promotion expenses, which had a significant impact on enterprises with mainly low- and mid-range products. To cope with the difficult situation, liquor companies have taken the initiative to implement innovations in their production and operation models. For example, the Wuliangye Group launched a number of buyout products based on the Wuliang Alcohol buyout business model, giving rise to strong brands such as Wuliangchun, Jin Liufu, and Liu Yanghe; the emergence of super premium liquor products such as Shuijingfang and Guodiao 1573 reflected the importance of price in the competitive liquor market and also formed a precedent for multi-brand operation in liquor enterprises.

From 2003 to 2012

It was a golden period of development, with China’s GDP growing from RMB13.66 trillion to RMB53.41 trillion between 2003 and 2012, at a compound annual growth rate of over 10%, and a decade of ‘golden’ development for the liquor industry driven by rapid macroeconomic growth. During this period, both national liquor brands and local regional liquor companies experienced rapid development, with liquor companies generally adopting a dual-brand strategy and increasing sales and share of mid- to high-end liquor. Against the backdrop of rising volumes and prices in the liquor market, liquor companies achieved rapid growth in sales revenue and total profits.

From 2013 to 2016

The period 2013–2016 was a period of deep adjustment. During this period, China’s macroeconomy again entered a period of structural adjustment, while the State launched a series of policies to restrict the consumption of the “three public” items, such as the “Eight Provisions” and the “Six Prohibitions.” The consumption of high-class wine at public expense is strictly prohibited. The restriction on business and government consumption has greatly affected the sales of premium liquor, resulting in a rapid

decline in sales of premium liquor products and a major impact on the price system. The rapid decline in consumer demand in the short term has brought to the fore the contradictions of overcapacity that exist in the liquor industry, and the industry has entered a period of deep adjustment. Since 2014, high-end liquor companies have been adjusting their business strategies and have begun to capture the mid-range liquor market, leading to further competition in the mid-range liquor market and greater challenges for the development of regionally dominant liquor companies.

Currently (after 2016 -)

Since 2017, the overall liquor industry has seen a rise in volume and price, with a more significant recovery in mid- to high-end liquor. In the future, the change in the concept of consumption in the mass market and the upgrading of consumption levels will be the main driving forces behind the development of the liquor industry. Chinese liquor enterprises need to fully grasp the golden opportunity of mass consumption upgrade through quality improvement, market segmentation, and product innovation to better meet the consumption needs of the mass market and promote the transformation and upgrading of product structure¹¹. So far in 2018, there has been a strong rise in the liquor segment, with a huge impact from new retail. At present, the four traditional sales channels in the liquor industry (distribution, group buying, hotels, and supermarkets) still have a pivotal position, although many liquor companies have now also established e-commerce channels, which are more of a channel supplement. With the development of new retailing, the improvement of information technology, and the full application of data, the wine market can be transformed through new retail systems to establish a complete offline distribution system upstream in the supply chain and downstream directly to consumers. In 2017, the total brewing output of liquor enterprises above the national scale was 11,980,600 kiloliters, representing a year-on-year growth of 6.86%; the cumulative sales revenue of liquor enterprises above the national scale was RMB 565,442 million, representing a year-on-year growth of 14.42%; and the cumulative total profit was RMB 102,848 million, representing a year-on-year growth of 35.79%. From the perspective of the domestic market, the competitive advantage of companies comes from the influence of their own brands, product styles, and marketing operation models. In a single regional market, a company's competitive advantage depends on its brand influence in the region, regional consumer recognition, and comprehensive marketing capabilities. The current competitive market for the main domestic liquor aromas is as follows: strong spiced liquor continues to maintain its dominant market position, while miso, clear spiced, phoenix, and part spiced liquor have their own consumer groups and markets. Due to its long history and high acceptance of its style characteristics among the majority of liquor consumers, coupled with the fact that there are more famous and premium liquors, adequate product supply, and high market penetration, strongly spiced liquor continues to dominate the liquor market. Official and business consumption has decreased significantly, and the reduction in demand for premium liquor is difficult to recover in the short term; meanwhile, mass consumption such as at weddings and banquets is still growing steadily, with a clear trend of consumption upgrading¹².

From “brand war” to “category war” Chinese liquor brands began after the founding of the country, with the national wine Moutai, which was personally ordered by Chinese Prime Minister Zhou Enlai,

11 Qiang 2015

12 Chen 2020

naturally being the top liquor in China. China's famous spirits, especially the old ones, are basically historical and have real materials. For example, the Sichuan wines represented by Wuliangye and Luzhou Laojiao, whose origins have been wine regions since ancient times, and Moutai in Guizhou, whose unique natural environment has created the legend of sauce-spiced liquor, They all have excellent origins and unique natural conditions to produce authentic and praiseworthy tastes, which are also beyond the reach of the rising stars of wine brands. The Chinese liquor industry has now entered the "brand" competition stage after experiencing the shift from "quantity" to "quality." In terms of internationalization, the Chinese liquor industry lacks internationally recognized brands and recognition, and Chinese liquor branding is obsessed with cultural appeal and a single consumer group structure, making it difficult to open up international markets. Chinese liquor brands for the international market should establish an international brand concept, pay attention to consumer perceptions, and create a personalized brand image¹³.

BUSINESS CASE STUDY OF GUIZHOU MOUTAI GROUP

GENERAL LANDSCAPE

The number of liquor enterprises in China is currently around 37,000, most of which are small. The Chinese liquor market is divided into several categories, the first of which includes Moutai and Wuliangye. They are undoubtedly the two most powerful and appealing national brands of liquor in China and are the benchmark of Chinese liquor, representing the highest level of Chinese liquor, which is difficult to surpass. They are followed by the second group, represented by Luzhou Laojiao, Yanghe, and Langjiu. Each of these three groups competes fiercely within itself, each trying to outdo its rivals and rise to the top. According to the China Wine Industry Association, in the past year, the cumulative sales revenue of Chinese liquor enterprises above the designated size has reached 583.6 billion yuan. Among them, Kweichow Moutai ranked the industry leader with a revenue of 97.99 billion yuan that accounted for 16.79% of the revenue, followed by Wuliangye with a market share of 9.82%¹⁴.

But the liquor business is a profound discipline, a comprehensive competition of strength, brand, and culture. Now the Chinese liquor market is still undergoing continuous screening, with good brands constantly improving and many new brands rapidly joining the family, with a hundred schools of thought and a hundred flowers blossoming. As the liquor industry belongs to the traditional industry, with China's long history and culture, each high-end brand of liquor has superior quality but also has a heavy historical and cultural accumulation, so the well-known brands are also generally old brands with a deep mass base, which cannot be achieved by technology and capital alone. At the same time, these companies in the first group have an all-round advantage in terms of channels, brands, production capacity, and capital accumulated over the years, which is also difficult for later entrants to break through. Since the reform and opening up, China's economy has grown and residents' disposable consumption level has increased, making the pursuit of a high quality of life no longer a luxury for ordinary people. According to the survey, 32.5% of consumers choose liquor from RMB 20-40, 38.7% choose liquor from RMB 40-60, and 18% choose liquor from RMB 60

13 Hao 2006

14 Chen at el. 2022

or more. Furthermore, China's population is 1.4 billion, of which 900 million live in rural areas, making up a huge consumer group. Liquor has a strong vitality and a large market potential in rural areas due to national traditions. Although there is still a big gap between the development of rural areas and urban areas due to cultural differences and different habits, their consumption of liquor is rather larger than that of urban areas. At present, large and medium-sized liquor companies have gradually started to pay attention to the importance of the rural market and its consumption potential¹⁵.

Although the trend is for lower-alcohol Chinese liquor to be the future of high-end Chinese liquor, it is the key to internationalizing Chinese liquor, getting it into nightclubs, and attracting the younger generation to accept and pass it on. However, so far, the leading players in the liquor industry have continued to focus their efforts mainly on high-alcohol beverages. In addition to being subject to tax policy adjustments, the industry as a whole has placed greater emphasis on the power of brands, moving away from the pursuit of production towards increased production values, with famous old spirits taking on new life and many regional brands achieving notable success in their local markets. The various brands in the liquor industry were driven by Maotai and Wuliangye, which set off a boom in price increases year after year, with price increases of up to 30% at the end of 2020 compared to the beginning of the year. However, due to rigid demand, the price increase does not affect people's consumption too much, so this trend will continue.

CURRENT MARKET SITUATION OF GUIZHOU MOUTAI GROUP

The Guizhou Maotai Group's marketing network now covers Asia, the United States, Europe, Oceania, China's duty-free market, and southern Africa, and has an agent overseas. Guizhou liquor is exported to Singapore, Japan, Hong Kong, the United States, Thailand, Macau, the Philippines, Australia, and South Korea, among other countries or regions. Surprisingly, in Hong Kong airport duty-free shops in China, Moutai wine is usually snapped up after hitting the shelves, which speaks volumes about the popularity of Moutai wine. In 2007, the Guizhou Maotai Group signed a strategic overseas marketing agreement with the French Camouflage Wine Group for a period of several years. The group is the world's largest cognac house, and Camouflage has pledged to create the high-end image of China's number one liquor brand in the international duty-free market and to distribute Moutai in the world's best-selling duty-free shops. Chinese and consumers from other Asian countries such as Korea and Singapore constitute the main overseas consumers of Guizhou liquor, which has a lot to do with Chinese wine culture. However, in many countries in Europe and America, liquor is called "strong wine," and they rarely quote strong wine but only some milder wine. The standard international practice for alcohol concentration is 40% (V/V) to 43% (V/V). You should see that with the increasing integration of the global economy, the competition between companies as well as brands is increasingly highlighting the trend towards globalization. Guizhou Maotai's international operations will only be able to meet the demands of the international market and expand their market scale if the alcohol content of the wine is in line with international standards and practices and if the current traditional product structure of a single alcohol content and a single variety is changed¹⁶.

Moutai wine is a luxury product and is positioned in the high-end consumer market. As a classic

15 Lei and Liang 2010

16 Guizhou Maotai Group 2022

liquor inherited from five thousand years of Chinese wine culture, Moutai was awarded a gold medal at the 2007 Panama World Expo and was selected as one of the three most famous liquors in the world along with French cognac and British scotch whisky. The China Luxury Association released “China’s First Luxury Brands” and the “Industry Standard for Chinese Luxury Brands,” in which Feitian Maotai topped the list of China’s first luxury products. Compared to other exported spirits, Guizhou Moutai’s exports receive more policy support. As a leading enterprise in Guizhou province, Guizhou Maotai Group plays a major role in the province’s annual revenue generation as well as solving local employment problems and improving people’s living standards. Policies have been implemented to protect Maotai’s brand and intellectual property rights; a green channel has been established for Maotai’s exports to reduce the time it takes to report for inspection, save time, and improve the efficiency of Maotai’s exports by making it faster to report for inspection, handle documentation, and verify data; and the group has been assessed as a double-grade import and export credit enterprise and has been granted relevant preferential treatment.

Although Moutai, Luzhou Laojiao, Wuliangye, and other famous liquor companies have made efforts to increase the development of mainstream international markets such as Japan, South Korea, Europe, and the United States, the majority of Chinese liquor exports are concentrated in Chinese cities such as Singapore, Hong Kong, Taiwan, and Southeast Asia, and the main consumer groups are still mainly ethnic Chinese. The fact that Chinese liquor is traditionally consumed at a high temperature of over 50 degrees has led some international consumers to misunderstand liquor as “alcohol.” On the one hand, international consumers tend to drink wine at lower levels and are not accustomed to drinking high amounts of alcohol; on the other hand, foreign consumers and domestic consumers have different preferences in terms of product packaging and drinking styles. Although some Chinese liquor enterprises have tried to “lower the degree” in order to adapt to the younger consumption of Chinese liquor and to meet the needs of foreign consumers in the process of “going out,” even if they have “gone out” due to the lack of a matching consumer environment and culture for Chinese liquor, However, due to the lack of a matching consumer environment and culture, even after going global, Chinese liquor is still a niche consumer and has not entered the main stream¹⁷.

From sorghum cultivation to the production of wine malt, then to brewing and fermentation, to the final product in storage, Moutai insists on selecting the best seeds, organic fertilizers, best technicians, best sourers, and excellent technical personnel and monitoring equipment. The unique microbial environment of Maotai Town, layered on top of each other, gives Maotai wine its unique character. By mixing at different times, not serving flavors, carefully blending combinations, and not adding any extra ingredients in the process, this most complex brewing process achieves the most unique position of Moutai wine among steamed hall spirits. Guizhou Maotai is a typical representative of China’s national industry and commerce and is one of the first representatives to go global. Moutai was awarded the World Expo in Panama, USA, and is known as one of the world’s four most famous distilled spirits, along with French brandy, British whisky, and Russian vodka, and is a typical representative of China’s sauce spirits category. Guizhou Moutai has been awarded international gold medals for the second time and is occupying the top spot in the domestic liquor industry’s wine list, being the only one to establish green and organic food in the liquor category, becoming a geographical indication product in the liquor category brand, and being recognized as

China's national wine. Its unique brewing process has also been listed as the first batch of national intangible cultural heritage. The Guizhou Maotai Group is a strong Chinese enterprise and has been named one of the most respected companies in China by Fortune magazine for many times. The listed company has been on the global Forbes list for many years and has been named the "Most Valuable Listed Company of China Central Television" for many times. The above shows that the Guizhou Maotai Group has a good corporate image and brand influence, which is a strong internal motivation for the internationalization of the company. The existence of Maotai is not only a history of the growth of an enterprise but also a strong testimony to the continuous development and growth of China's national industrial brand, which has become an important calling card for China's external relations and plays an increasingly important role in China's political, economic, and social life¹⁸.

EMERGING CHALLENGES FOR MAOTAI GROUP BUILT-UP INTERNATIONAL BUSINESS

Lack of wide experiences in internationalization

Although the Maotai Group currently has market shares in several countries and regions on the international market, the total volume is not large. The markets are mainly in North American and Asian countries, concentrated in the Chinese market. The export volume is not very large, accounting for only about 5% of the total production, and the international development of Guizhou Moutai is difficult because the brand culture is not widely promoted, the taste varies from person to person, and the market share is low. China's liquor companies can adapt to the overseas business environment more quickly, which will help them develop foreign markets. China is a member of the multilateral trading system, which aims to establish a complete, more dynamic, and permanent multilateral trading system, and Guizhou Maotai's international operations will certainly be monitored and protected by the WTO¹⁹.

Limited production capacities

In addition, the high-quality glutinous sorghum and wheat in and around Renhuai, which are required for the production of Moutai's raw materials, are stored and blended for a long period of time through three typical periods, such as sauces. A number of off-site experiments have revealed that Maotai liquor can truly only be produced in the town of Maotai's unique ecological environment. If the quality and taste of Maotai wine are guaranteed, it will be difficult to significantly increase production, and Maotai will face a shortage of production capacity. However, in order to increase Maotai's production without regard to its quality, consumers will question the quality of Maotai wine, which will result in a decline in loyalty to the product, and ultimately the company's production and performance will be adversely affected²⁰.

Taste of Moutai liquors

18 Xinxin et al. 2009; Yiyong and Shaihua 2004

19 Xinxin et al. 2009

20 Guo et al. 2020

The taste is not suitable for international consumer groups, and the export sales are mostly to Chinese. Chinese liquor is a kind of steaming house wine unique to China, and there are many different kinds. Chinese people have had a sense of affinity for and belonging to Chinese liquor since ancient times. Foreigners need a certain amount of time to adapt to the taste of Chinese liquor, and it does not form a dependency among the international consumer group in the short term and requires some time to cultivate²¹.

China's policy support

As a leading enterprise in Guizhou Province, Guizhou Maotai Group has played a major role in the province's annual job creation as well as solving local employment problems and improving people's living standards, as it should. As a result, the government has provided rather generous preferential policies and stringent protection measures during the company's development. For example, policies have been introduced to protect the brand and intellectual property rights of Maotai wine; a green channel has also been introduced for Maotai in its exports, reducing the time it takes to report for inspection and saving time while improving the efficiency of exports of Maotai wine by being faster in reporting, processing documents, and verifying data; the group has been assessed as a double-level import and export credit enterprise and given relevant preferential policies; to ensure the purity of exported Maotai wine, the government only allows In order to ensure the purity of the quality of exported Maotai wine, the government only allows two affiliated enterprises to have the right to export Maotai wine, while the exported wine of other enterprises is not accepted for inspection. In terms of technology, Maotai wine is implemented to the highest national standards, without coming to a technical wall fish from all sides, and in the international arena, using the practices prevailing among the teeth, without special walls for wine enterprises. For China's high-end liquor consumers, the proportion of official consumption was more than half of the total consumption, business consumption accounted for about thirty to forty percent, and personal consumption accounted for only about 10%. The country's "ban on alcohol" has also pushed high-end wine to the forefront of anti-corruption efforts. Although it may appear that a series of unfavorable domestic conditions have brought Maotai unprecedented disaster, it is precisely this difficult situation that has inspired Maotai to seek new development abroad. So in this sense, the unfavorable domestic situation was a strong motivation for Maotai's international development²².

In order to curb the impact of imported spirits on the domestic spirits industry and to protect the domestic spirits industry, high tariffs are common in various countries. However, the brewing process unique to Chinese liquor and the quality standards of domestic liquor products differ significantly compared to those on the global market. These inherent reasons put Guizhou Moutai wine at a competitive disadvantage in the international market. In addition, in terms of overseas expansion channels, the Guizhou Maotai Group has chosen to participate most in exhibitions or international fairs, recommendation meetings, etc. However, this is only short-term; for long-term product production and marketing, the creation of shops and other aspects are more difficult. It is clear from the above that, in terms of overseas market expansion, the Maotai Group is facing high pressure to reduce costs.

21 Lirong and Shouchang 2010

22 Kui 2017; Tiejuan 2020

The majority of Moutai buyers in the international market are Chinese, who have a high level of recognition of Chinese liquor culture, but most foreign consumers still prefer lower-strength liquors. In terms of adapting to consumer demand, what Maotai should do is cultivate consumer habits and spread the culture of liquor, which is a long-term and difficult task. Of course, appropriate adjustments can be made to the products to suit the consumer base. Maotai Group faces the high pressure of regional commissioning in its international operations. The table below summarizes the Maotai Group's future success in the global market.

Table 1. SOME FACTS ABOUT MOUTAI GROUP

ELEMENT	DESCRIPTON
TECHNOLOGICAL BASE	Maotai Group has a relatively deep technological base, as well as unique quality, a unique environment and unique benefits.
TURNOVER	Despite its strong rivalries on the domestic and international market for example the well-known local companies like Wuliangye, Mautai Group has a stable turnover in foreign companies, and the Moutai Group has a strong ability to raise capital in the international market, and also excels in its ability to hedge risks.
PROFILE	Maotai Group has a high profile and by acquiring wineries and using existing sales channels to sell not only saves on promotional costs, but also effectively expands its own sales.
BRAND VALUE	In recent years, the Maotai Group has had a strong brand value in the world. With the expansion of exports and the acquisition of famous distilleries, Maotai has become better known to more foreign friends. From a share price perspective, foreign investors are very optimistic about Moutai's market capitalisation, maintaining its number one position in the liquor sector.
BRAND POSITIONING	Maotai Group has positioned itself precisely in the high-end market according to the actual situation, and has also made precise divisions in the low-end market. Moutai Group has a mature process chain and advanced monitoring equipment, and in terms of brand management, it mainly promotes and sells through export agents. In addition, the Maotai Group is not sufficiently strong in maintaining its brand and its response mechanism is too slow, which needs to be improved.

Source: Own edition based on ²³.

In recent years, the continuous promotion of China's BRI policy has created the best opportunity for liquor to go to sea. It can be said that in the process of active innovation and transformation, the entire liquor industry has acquired a more objective international outlook, and the liquor companies represented by Maotai have accelerated their pace towards the international arena, based on quality and cultural ties. In this process, Maotai has seized the opportunity to actively integrate into "One Belt, One making the marketing of countries along the route the focus of its overseas layout and promoting Maotai's continuous, stable, and positive development in overseas markets. At present, Moutai has 104 overseas distributors in 64 countries and regions around the world, with distributors on five continents (Asia, Europe, America, Africa, and Oceania). Moutai will consider the market situation and develop a benign development pattern that focuses on domestic and promotes each other domestically and internationally²⁴.

²³ Achijo et al. 2020; Donhong 2008

²⁴ Liu and Dan 2018; Rong and Milfan 2020

CONCLUSIONS AND RECOMMENDATIONS

Although dominated by domestic companies, consumption of foreign beer, wine, and other liquor is growing, driven by rapid urbanization, increasing disposable incomes, and changing lifestyles. There is a large number of Chinese people who buy alcohol for themselves rather than giving it as a gift to others, and there is a greater willingness to try new types of alcohol. Domestic beer, rice wine, and Chinese distilled alcohol are among the alcoholic beverages available to Chinese consumers. Despite consumers becoming more health conscious in recent years and more people showing a preference for drinks with lower alcohol content, demand for high-alcohol Chinese distilled liquor has remained strong. Furthermore, raising people's living standards has led to a rapidly increasing demand for high-end Chinese alcohol. Many members of China's wealthy and corporate elite are investing in and indulging in high-end spirits and wines. This trend can serve as a driving force beyond the Chinese liquor industry's unprecedented development in the last decade.

The traditional liquor industry has to be driven by innovation in order to win high-quality development. In this context, the first step is to innovate institutional mechanisms, build an institutional environment that is compatible with high-quality development, effectively stimulate the vitality of market players, mobilize individuals and enterprises to the greatest extent possible, and transform the profit-seeking motives of individuals and enterprises into economically and socially beneficial behavior. To this end, famous liquor brands and famous wine-producing areas should be protected and valued at the national level to encourage innovative development so that the market can rationally allocate resources through innovation and promote high-quality development of the industry; secondly, behavioral change and innovation should be carried out.

Due to the lack of experience in internationalization and the low international competitiveness of Chinese liquor, the Chinese government could further increase its support for the international development of liquor by reducing restrictive policies on liquor exports and increasing encouraging policies for liquor exports, taking into consideration the following elements, which are based on the Guizhou Moutai Group case study, but require further research to put them into a broader context involving other aspects and factors as well as making generalizations for the whole Chinese liquor industry.

CULTURAL ASPECTS

Cultural exchanges play a positive role in promoting brand marketing and consumer choice. Throughout the history of foreign trade development in developed countries such as Europe and the US, many countries have also used cultural communication to promote their export trade. Chinese liquor has a high degree of cultural attributes and is rich in cultural connotations, and Chinese liquor culture is an important part of Chinese culture. To improve the international competitiveness of Chinese liquor, it is necessary to play a leading role in the government's foreign cultural propaganda, to fully explore the cultural connotations of liquor, to spread the culture of liquor through Chinese culture, and to increase the international recognition of liquor culture.

Chinese liquor exports fully develop the cultural connotations of liquor. Chinese liquor culture has both practical and artistic functions and plays an important role in all aspects of China's political, economic, cultural, and social life. From Liu Bei's Hongmen Banquet to Cao Cao's wine banquet, from

Zhao Kuangyin's explanation of military power to Zhu Yuanzhang's wine banquet, liquor was used throughout ancient political culture; liquor was also used to treat illnesses and save lives. In literature and art, Chinese liquor is used to inspire, and there are no less than a hundred scenes of drinking in Tang poetry, song lyrics, and Yuanqu, as well as in the four famous Chinese novels. After thousands of years of development, China has developed a drinking culture that includes drinking etiquette, drinking times, drinking places, and drinking interests, which, together with the culture of the brewing process and the culture of the apparatus, have formed a profound and sophisticated culture of liquor. In the dissemination of Chinese liquor culture, it can be visualized and perceived through poetry, literature, calligraphy, painting, traditional musical instruments, and other forms of art to show the culture in a comprehensive manner. Innovative cultural expressions are needed when communicating Chinese liquor culture, promoting the integration of liquor culture with the entertainment industry, and the integration of liquor culture with the tourism industry²⁵.

The international competitiveness of Chinese liquor needs to be enhanced by leveraging the international influence of Chinese culture. The Chinese government has great influence internationally in a way that the audience countries can understand, promoting cultural exchanges through diverse forms such as foreign affairs events organized by government departments, diplomatic activities such as state visits by important national leaders, large international forums and conferences organized by the government, international events, national cultural promotion and exchange activities, and art performances. It will also promote the spread of Chinese liquor culture around the world.

QUALITY ASPECTS

Product standards are a prerequisite for product safety and quality evaluation. The construction of an international standard system for liquor is a prerequisite for Chinese liquor to enter the international spirits market. The Chinese government should carefully study the standards and regulations related to the production safety management, quality management, labelling management, packaging management, and advertising management of spirits in developed European countries, especially the construction of quality standards for British whisky, French brandy, and Swiss vodka, and promote the alignment of Chinese liquor industry standards with international standards as soon as possible, so as to form an international standard system for liquor exports and lay the foundation for Chinese liquor exports. With economic development and consumer upgrading, consumers are demanding more and more product safety and quality and are more concerned about product standards. In terms of wine quality and safety standards, developed countries such as the EU have extremely stringent management standards, such as France, which has a French High Commission for Standardization (CSN), which proposes to the Ministry of Industry the construction of relevant standards according to the international and domestic situation, and the French Standardization Association has also joined the European Committee for Standardization (CEN) and the International Organization for Standardization (ISO) to participate in the construction of relevant international standards and promote domestic standards that are in line with international standards. Chinese liquor is a traditional spirits industry with a complex brewing process and numerous classifications, and the system of product quality and safety standards for liquor

25 Fengting et al. 2018

production technology, trace ingredients, food additives, and packaging is incomplete. In previous years, there have been product quality and safety issues with “alcohol blending,” “plasticizers,” and “sweeteners.” The Chinese government should increase investment in the construction of quality and safety standardization in the liquor industry, strengthen the supervision and management of liquor quality and safety through quality and environmental legislation, organize relevant departments and industry associations to strengthen research on liquor production technology, liquor trace ingredients, liquor product traceability systems, and other technical aspects, as well as research on international food quality and safety standards and international food packaging standards, to accelerate the promotion of Chinese liquor and establish a liquor quality and safety standard system that is in line with the world²⁶.

Quality standards are an important reference for consumers when purchasing goods. In France, for example, the French government has established strict national standards for the quality of cognac, which has established the high status of French cognac in the international arena. Only cognac produced in the 36 counties surrounding the town of Cognac can be named Cognac, and only cognac distilled from grapes from the Grand and Petit Champagne regions can be called “FINE CHAMPAGNE COGNAC.” According to the latest revision of the cognac classification by the French National Authority for the Cognac Industry in 2018, French cognacs are classified into 4 classes according to the time they are aged in oak barrels before bottling: V.S. for at least 2 years, V.S.O.P. for at least 4 years, Napoleon for at least 6 years, X.O. for at least 10 years, and Hors d’Age, Extra, Ancestral, Ancestral, and Ancestral. Ancestral, Ancetre, Or, Gold, and Imperial are in the same class as X.O. In contrast, Chinese liquor has many different aromas, and China has not established a unified system of quality standards for liquor exports, making it impossible for consumers in international markets to make judgments about the quality of liquor. The Chinese government should adjust the labelling, packaging, and advertising standards for Chinese liquor exports according to the country or establish labelling, packaging, and advertising standards for Chinese liquor exports to the international market based on standards higher than those prevailing internationally²⁷.

EXPORT TRADE ASPECTS

At present, Chinese liquor still faces high import tariffs compared to other spirits. For example, Korea is one of the most important regions for Chinese liquor exports, but under the Korea-China Free Trade Agreement, Korea imposes an 8.0% CIF (Cost, Insurance and Freight) import tariff on Chinese liquor, while under the Korea-EU Free Trade Agreement and the Korea-US Free Trade Agreement, Korea imposes zero tariffs on imports of spirits from the EU and the US, which greatly reduces the competitiveness of Chinese liquor in the Korean spirits market. The Chinese government should strengthen bilateral, regional, or multilateral communication and negotiation with other countries to reduce import tariffs on liquor from those countries. Establish reciprocal trade conditions so that Chinese liquor exports have the same trade status as other world spirits.

Breaking down barriers to China’s high-quality liquor export trade will require efforts

²⁶ Donghong 2008; Qiuxi 2016

²⁷ Kui 2021, Tiejuan 2020

from the Chinese government in terms of tariff policies for the import and export of liquor, laws and regulations for international trade in spirits, and the promotion of certification for geographical indication protection for liquor. The government holds the power to negotiate tariff policies with the governments of importing countries and plays an important role in the export of liquor²⁸.

In addition, China's management of the geographical indication system for liquor is also not uniform in its management system and lacks a strict and effective monitoring system. Although China has famous liquors such as Moutai, Wuliangye, Jiannancun, and Luzhou Laojiao, the lack of supervision of geographical indications for liquors has led to acts such as counterfeiting that disrupt the market order and hinder Chinese liquor exports. The protection of geographical indications for Chinese liquor abroad is inadequate, with only 11 Chinese liquor geographical indications currently protected by the European Union. In order to improve the international competitiveness of Chinese liquor, the state should not only establish its own comprehensive system for the protection and regulation of geographical indications for liquor at home but also actively promote the recognition and protection of geographical indications for Chinese liquor abroad²⁹.

THE GLOBALISATION OF THE ECONOMY

The Free Trade Zones (FTZ), through reforms and innovations in economic policies, legal policies, regulatory policies, and approval policies, have a number of institutional advantages such as freedom of currency circulation, freedom of trade, tax concessions, and financial convenience, providing a freer and more convenient business environment for foreign economic development. By synergizing the development of the liquor-producing regions with the FTZ, the improved transport facilities and centralized declaration of goods for export in the FTZ will help reduce the export costs of enterprises. The FTZ can provide financial facilities for the export of the liquor industry by virtue of its more convenient capital financing function. By promoting the clustering of industries through the absorption of capital and talent, the FTZ can facilitate the construction of R&D innovation and international marketing centres for liquor, thereby improving the international competitiveness of Chinese liquor³⁰.

In the long term, the Guizhou Maotai Group should try to run a multinational strategy that focuses on cost reduction on the one hand and product diversification on the other to achieve the effect of simultaneously achieving low-cost advantages and product differentiation advantages. In today's ultra-competitive international alcoholic beverage market, survival and development must take advantage of experienced cost savings and locational economies while focusing on regional debugging pressures. Moutai Group should rely on its many years of experience in distilled spirits brewing, actively research and develop, and strive to expand its output on the basis of quality assurance to achieve the scale effect and learning effect to reduce costs. It should be noted that the current level of spirits in the international spirits market is lower than in the domestic spirits market. Moutai Group should improve its spirit blending technology in its international operations and ensure quality. At the same time, the group should focus on diversifying its range of liquors and developing a range of different low- and medium-degree Moutai liquors to better match this

28 Kui 2017

29 Yuling 2020

30 Yunan et al. 2020

product family with the international market.

Brand management should be based on three aspects: brand technology, brand image, and brand marketing power. Technological power is the most fundamental part of brand management, because from a legal point of view, quality is the most fundamental part, and the essence of a brand is just a trade mark.

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CHIŃSKIE LIKIERY JAKO ŚWIATOWE MARKI – STUDIUM PRZYPADKU GUIZHOU MOUTAI GROUP

Streszczenie:

Chiny to jeden z największych rynków napojów alkoholowych na świecie. Chiński przemysł alkoholowy ma ponad 5000 lat i odzwierciedla tradycyjne chińskie wartości kulturowe. Poprawa międzynarodowej konkurencyjności chińskiego likieru może być kluczem do promowania eksportu chińskiego tegoż trunku. W ostatnich latach polityka „Belt and Road Initiative (BRI)” oraz dogłębna realizacja kompleksowej strategii otwarcia stworzyły możliwości międzynarodowego rozwoju chińskiego trunku w celu wzmocnienia promocji kulturowej, stworzenia silnego efektu marki i wejść na drogę do otwarcia światowego rynku. Chiński przemysł alkoholowy wszedł teraz na poziom konkurencji „markowej” po tym, jak doświadczył konkurencji „ilościowej” do „jakościowej”. Jeśli chodzi o internacjonalizację, chińskiemu przemysłowi alkoholowemu brakuje marek rozpoznawalnych na całym świecie, a chiński branding alkoholi ma obsesję na punkcie atrakcyjności kulturowej i struktury jednej grupy konsumentów, co utrudnia otwarcie rynków międzynarodowych. Promocja międzynarodowej konkurencyjności chińskiego trunku wymaga wspólnych wysiłków rządu krajowego, stowarzyszeń branżowych i przedsiębiorstw.

Dwie chińskie marki, Moutai i Wuliangye, należą do najlepiej sprzedających się luksusowych trunków na świecie. Pomoże to również przyspieszyć likwidację nadmiernej zależności chińskiego przemysłu alkoholowego od rynku krajowego. Jako wiodące przedsiębiorstwo w prowincji Guizhou, Guizhou Maotai Group odegrała dominującą rolę w rozwoju gospodarczym prowincji, rozwiązując jednocześnie lokalne problemy związane z zatrudnieniem i poprawiając standard życia ludzi. Grupa Guizhou Maotai powinna wdrożyć wielonarodową strategię, która koncentruje się na redukcji kosztów i dywersyfikacji produktów, aby jednocześnie osiągnąć korzyści w zakresie niskich kosztów i zróżnicowania produktów. Zgodnie z założeniem autora, po przeanalizowaniu procesów biznesowych tej firmy i wyciągniętych z nich wniosków, fakty te mogą służyć jako dobry przykład odniesienia dla innych interesariuszy chińskiego przemysłu alkoholowego, przyczyniając się do zrozumienia niektórych krytycznych czynników, które wpływają na podejmowanie decyzji, w jaki sposób chińskie alkohole mogą stać się rozpoznawalnymi na całym świecie markami.

W tym kontekście w niniejszym artykule przeglądowym omówiono główne trendy w chińskim przemyśle alkoholowym za pomocą studium przypadku Guizhou Maotai Group w celu ujawnienia i zrozumienia głównych wyzwań, które stoją przed nimi oraz podsumowano kilka zaleceń dotyczących sposobów przezwyciężenia trudności na drodze do transformacji Likieru Moutai w szeroko znane, cenione światowe marki. Należy podjąć dalsze prace badawcze w celu ustalenia, w jaki sposób uogólnić te wnioski na cały sektor.

Słowa kluczowe: chiński trunek, Moutai, różnice kulturowe, wartość marki, pozycjonowanie marki, aspekty jakościowe