

WHO'S WHO IN JAPAN

The results of our survey were compiled by Ned Goodwin from responses to a questionnaire sent to 250 key members of the Japanese wine trade. The results offer a window into this very interesting, luxury-hungry market.

Japan's wine market is not a dynamic one, despite the country's willingness to embrace new foods and fashion. French wine commands 45% of the market, though only Bordeaux, Burgundy and Champagne. At one end is generic Bordeaux selling for an average of ¥800 (\$6.85/€4.85); at the other is Dom Perignon, of which Japan consumes more than any other market. There is little interest in other French regions such as the Rhone, or in other countries.

Consumption is more or less three bottles per person per year, a figure that hasn't budged since the end of the wine boom in 1998, despite the superb range of international wines available and lenient taxes. A greater percentage of wine is consumed in the on-trade at 38% than in most countries, making restaurants, bars and clubs highly influential. Despite this, there is no championing of food and wine matching.

When reading this poll, a couple of points need to be considered. Under normal circumstances, the opinions of buyers, sommeliers and journalists can make a dynamic market. But Japan's reverence for authority figures, coupled with the cultural need to ensure that everyone saves face, means there is little opportunity to openly and honestly critique wines, restaurants or the industry in general.

And the fact that Japan boasts more sommeliers than any other country outside of Italy means little. As Stephen Spurrier has noted in a recent issue of *Decanter*, while most sommeliers "...can just about manage a corkscrew, only a small percentage - generally from a younger generation - have genuine enthusiasm and talent."

Wine is not an integral part of traditional culture, and the Japanese are likely to choose local alcoholic beverages,

such as sake or beer, before wine. Therefore wine consumption will never be high in Japan. Yet surely a land that boasts of its sensitivity to the site a beverage comes from can be convinced to drink more than two litres of wine a year.

More optimistically, wines of ¥1,200-1,500 (\$10.50-13.00/€7.30-9.99) are selling three times more rapidly than the average and value is rising. According to the domestic trade publication, *WANDS*, Japanese consumers are becoming more discriminating as the sales of beer and shochu wane.

This poll does give insight into a market that befuddles and infuriates, but which is also profitable for those able to sell with flair. Clearly, alternative wines and sales techniques, to mention a few factors, can be successful in Japan.

Best Importer

Jeroboam was nominated more than any other importer. The recent sell-off of Laurent-Perrier's share in the firm, coupled with external investment from Hugel and Beaucastel, is surely a difficult dynamic for a Japanese-based importer. After all, it is not easy for foreign parties to understand that sales of wine are not affected by the affluence and the conspicuous consumption of other goods in Japan. However, Jeroboam took on 16 new brands in the last year and Laurent-Perrier was successfully replaced with Pol Roger. Jeroboam is also willing to introduce premium wines it believes in, including Sadie's highly-rated South African wines, and Kooyong's Pinot Noirs from the Mornington Peninsula. By definition, neither of these wines are an easy sell in Japan. Jeroboam pushes the envelope in the name of quality.

The runner up was Enoteca for its excellent 'Bordeaux and all Bordeaux'; however, several respondents thought

that "the selection of other wines was limited and conservative".

Best Specialist Importer

This category differentiates itself from Best Importer in that Specialists import wines from one or two countries, or in certain cases, from one region. The Vine tops this poll together with ORCA. Although predominantly a Rhone specialist - tough going in brand-aware Japan - the Vine also sells select German estates and quirky Australian wines. Head of the firm, James Dunstan, believes that the Japanese need to see wines beyond those available everywhere and anywhere.

ORCA is a specialist in wines from the American North-West, whose president, Jeff Renshaw, hails from Washington state. While the Japanese embrace Californian wine despite high prices, Oregon and Washington wines were a non-entity, yet ORCA has grown by 30% each year for five consecutive years.

ORCA's promotional events and tastings at bars frequented by Japanese and international clientele alike, are dynamic and highly successful. As one respondent noted, Orca holds "fun events for the public that really get people excited about wine. Many of my non-industry friends participate..."

Village Cellars is runner-up. Village Cellars has been selling Australian wine in Japan for 20 years. The range is broad, offering reasonably priced wines alongside super-premium. Village's monthly in-house tastings are hugely educational, and its delivery service excellent.

Best Retailer

Tokyu-Honten combines Bordeaux and Burgundy, with a lively mix of Italian, regional French and New World wines. Tokyu-Honten "proves that de-

BEST SOMMELIER*Yutaka Ozaki from SALT*

Yutaka Ozaki was the clear favourite in this category, winning praise from the industry for his customer service ethic, as well as his quick wittedness and willingness to speak his mind.

**MOST INFLUENTIAL WINE PERSON***Shinya Tasaki*

Shinya Tasaki, the world's number one sommelier in 1995, was the clear winner of the Most Influential Wine Person category, admired for both his knowledge and his modest attitude.



partment stores do not have to be boring," remarked Bill Campbell of importer Hotei. Boasting the highest per capita expenditure of any department store in Japan, cash flow helps nourish a fine selection.

Tokyo's Cave-de-Relax was the runner up due to astute buying, and the added value of a tasting-bar in the store. The tasting service opens the mind of many Japanese who would otherwise buy according to labels.

Best Wine List

The nature of this category led to vigorous debate. Should 'best' mean a wide, exorbitantly priced cellar; a balanced list covering all regions and price-points; or idiosyncratic selections and design, backed by solid service to encourage the enjoyment of wine in a land known more for hushed reverence? For non-Japanese industry respondents, lists that offer diversity were key, while the Japanese preferred traditional lists loaded with classics.

The winner was Legato, though I must divulge that I consult to them. The list's diversity, choice of by-the-glass offerings, and an all-inclusive JPY 3,990 list, in addition to a deeper reserve list, proved popular.

Equal runners-up are Tsubaki for its sheer hedonistic depth, and the Tokyo American Club for the breadth of its New World offerings and prices. Close behind is SALT and its all-Australian list, and the Georgian Club for its trove of classics.

Best Sommelier

This also divided respondents. The Japanese were more inclined to nominate long-serving stalwarts of the Japanese Sommeliers' Association, while foreign respondents much preferred sommeliers

with brio, able to cite wines from all regions and of varied price-points.

Yutaka Ozaki of SALT was the clear favourite of the vocal non-Japanese community, "because he's bright, sharp, knowledgeable, customer service oriented, capable of thinking on his feet; he speaks his mind, and is fearless to make appropriate recommendations (unlike, sadly, 95% of Japanese sommeliers)."

Sayoshi Goto at Chinoise and Michiyo Yamada of Tokyo American Club were equal runners up. Goto was applauded for coming from a service background and, according to Ernie Singer of importer Millesimes, being one of the few sommeliers to make a successful transition to business. Yamada is also celebrated because "she can sell," according to Carl Robinson of Jeroboam.

Best Wine Buyer

Kei Komata of Tokyu-Honten trumped this category. Komata's intelligent buying of Bordeaux en primeur, smart Burgundies and a well-rounded, if not conservative, selection of other wines stood out. Toshiaki Sekiguchi of Daimaru Peacock is a runner-up of note considering that Daimaru is a middle-tier supermarket. Sekiguchi's broad selection and consumer-friendly shelf alignment were also praised.

Best Storage and Transportation

Storage and transport are important in Japan due to low consumption levels and space constraints. Many restaurants stock only two or three bottles of many wines on a list, and rely on rapid delivery by temperature-controlled vans when an order is placed. Many warehouses-cum-cellars are outsourced.

Thus, expediency is imperative to a wine-program running smoothly. Japan Reefer System was the unanimous winner of this category due to pervasiveness and efficiency.

Best Wine Journalist

Given the lack of courage, or more accurately, an inherent aloofness and lack of critical facility among Japan's wine press, it was not surprising that one participant said "none of them matter". Perhaps this is why a foreigner, Robert Parker, topped this poll. Tomoko Ebisawa was nominated as the most influential local journalist, due to her untiring love of wine, travel and passion. Yoshiji Sato of Shuhan News was also praised due to his to-the-minute accounts of the trade as if he were everywhere at the same time. Masamitsu Yoshino of WANDS also received kudos for his "objective insights into the Japanese market".

Most Influential Wine Person

Shinya Tasaki, the world's number one sommelier in 1995, was head-and-shoulders above other nominees as the most influential individual in Japanese wine. Tasaki is self-effacing despite his fame, notes Ernie Singer. However, as one participant sardonically pointed out, Japanese consumption is still less than two litres. If anyone had more influence, consumption would be rising. Parker was runner up, while the wine-loving celebrity, Naomi Kawashima, was third. Kawashima's prominence in Japanese wine circles indicates the power of celebrity in brand-conscious Japan. ■

Ned Goodwin consults to Legato, one of the companies mentioned in this article. However, all results came strictly from the poll conducted.