Asia

Denis Gastin

Both the number of operational wineries and the number of countries in which wine is made in Asia continue to expand as the Asian wine revolution gathers greater momentum by the year.



DENIS GASTIN

Some of the concoctions appropriating the name 'wine' in Asia will continue to astound those with a conventional, 'Western' view of wine. But there are now at least 700 wineries in 11 countries in Asia principally or exclusively producing grape wine, many at the higher end of quality expectations. Half of them are in China, in 26 provinces, and more than a quarter are in Japan, concentrated principally in Yamanashi

and Nagano. China provides the bulk of the industry in Asia: the OIV now ranks it as the world's seventh-largest wine producer. Japan has forged most of the region's quality benchmarks thus far, on a boutique scale. But now there are new contenders: India and, perhaps even more surprisingly, Thailand, where progress in recent years has been stunning, in terms of the level of activity in the industry, the strides made in the pursuit of quality styles, and the substance of the new players. Other countries in which there is an established winemaking tradition include Korea, Vietnam, and Indonesia. Fledgling operations can even be found in Taiwan, Sri Lanka, Bhutan...

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... and now Myanmar (Burma)

Following an extensive viticultural trial programme launched in 1997. Myanmar Vineyard Estate's founder, Bert Morsbach, is convinced that it is both technically possible and economically viable to produce export-quality wine in Myanmar. He is now seeking additional capital to move to industrial-scale vine cultivation and winemaking to produce. under the Aythaya label, around 500,000 bottles of wine per year for local and export markets.

After trialling scores of grape varieties on limestone slopes at an altitude of 1,300 m (4,265 ft), near Taunggyi in the Southern Shan states, Morsbach has settled on Shiraz and Sauvignon Blanc as core varieties. The Aythava red is a Shiraz with some Cabernet Sauvignon. The white is a straight Sauvignon Blanc and there is a Muscat rosé. A Muscat white was added to the range in 2005 and there are plans to release wines based on Dornfelder, Tempranillo, Chenin Blanc, and Semillon. The production target for 2006 is 100,000 bottles.

Grapevine

- The Yangi Xiangdu Wine Co is a Sino-French joint venture in China's far-west, autonomous Xinjiang region, following in the footsteps of Vini Suntime, but at a more leisurely pace. While Vini Suntime has achieved staggering growth, reaching a crush of 85,000 tonnes in just four years and heading for 105,000 tonnes ultimately, Xiangdu's goals are more modest. The vineyard development programme began in 1994 and now covers 2,700 ha, relying principally on underground water reserves for moisture in this otherwise arid region. The initial winery capacity is 3,000 tonnes, expanding progressively to 30,000 tonnes as the vines mature. The venture's first wines were released in 2004 under the Les Champs d'Or label.
- Efforts to find the 'perfect' Koshu are gathering pace in Japan. Research undertaken by Château Mercian in collaboration with Bordeaux University's Professor Denis Dubourdieu and Dr Takatoshi Tominaga has isolated the compound

- 3-mercaptohexanol (3-MH) as the source of Koshu's distinctive aromas - described variously as resembling green pear, grapefruit, passion fruit, or even white flowers. Not surprisingly, 3-MH has also been found in grapefruit and passion fruit - and in Sauvignon Blanc. Château Mercian's Kiiroka Koshu, released in spring 2005, is the first wine deliberately seeking to maximize the 3-MH character.
- The Thai wine industry is mourning the passing of industry pioneer Dr Chaijudh Karnasuta, founder of Château de Loei, the first premium winery in Thailand. His conviction that Thailand's geographical location and tropical climate need not inhibit its capacity to produce fine wine has been well and truly validated by the industry that has emerged under his inspiration. A sparkling Chenin Blanc, Thailand's first, was a final landmark achievement.

ASIAN WINE: A NEW WAVE?

It is still only a tiny wave, but Asian wine is increasingly hitting the shores of Europe, North America, and other world markets.

India led the way when Château Indage launched its sparkling wines in France and the UK in the early 1990s. It is now established in eight markets and is developing eight new ones. More recently. Grover and Sula have been making inroads as well. Grover is exporting 25 per cent of its production, including 100,000 bottles a year to France. It has just tapped a new market in Russia and has Australia in its sights. Sula nearly doubled its capacity recently so that it can meet fastgrowing local demand and expand export commitments, which now account for 20 per cent of production.

China has a growing export flow to most major European and North American markets and, increasingly, throughout Asia. Industry leaders Changyu, Great Wall, and Dynasty have found a home principally in the world's Chinatowns. But wineries such as Dragon Seal and Shanxi Grace see a place for themselves in the

mainstream market. Dragon Seal has entered major international wine shows, winning medals at Chardonnay du Monde. Vinalies Internationales. and the London International Wine and Spirit Competition. It now exports 15 per cent of what it produces, mostly to Europe but also to the US and Japan. Although only in its third commercial vintage. Shanxi Grace launched in Germany, Austria, Luxembourg, Belgium, and the UK during 2005. Its export wines carry the name Tasva (after the granddaughter of founder CK Chan) to avoid trademark issues with longerestablished wineries in California and Japan that use the Grace name.

Thailand is the newest contender. Siam Winery's Monsoon label, for example, is on wine lists in more than 200 Thai restaurants in the UK: sales are around 15,000 bottles per month at present. Its long-term goal is to be on the wine lists of 6.000 Thai restaurants globally. The newly formed Thai Wine Association is joining forces with the National Food Institute to ensure a strong presence for Thai wine in the NFI's 'Thai Food to the World' campaign.

Grapevine

• It's been a tough year for Vini Suntime, China's western wine juggernaut. It had set out to win market share by strongly differentiating itself and challenging market conventions. Its target demographic is 25-34-year-olds, and movie stars and pop icons (such as Liang Chaowei and Maggie Zhang) were drafted to contrast the Suntime brands with the more conservative market leaders. But this is all very expensive and its target

customer group is notoriously fickle, which may be why greater efforts now seem to be going into more conventional marketing. As their new vineyards mature, some terroir is becoming evident, and Suntime's winemakers are monitoring and capturing this by separately fermenting the grapes from more promising areas and better growers. Look for reserve releases under the Suntime Niya label in the next few years.

INVESTORS DEVELOP A PALATE FOR CHINESE WINE

China's second-largest wine producer, Dynasty, a joint venture between state-owned Tianiin Development Holdings and France's Rémy Cointreau, tested the money market's palate for wine in China in early 2005 with an initial public offering (IPO) of 300 million shares. This was not the first share float by a Chinese wine operation, but it was the first time it had been done offshore (Hong Kong). The institutional portion of the IPO was 80 times oversubscribed, and the retail portion 625 times.

Another major capital repositioning reflecting strong domestic market growth involved the sale of a 33 per cent stake in China's largest wine

producer, Yantai Changyu Pioneer Wine Company, to Italy's Illya Saronno Group in February 2005. A further 10 per cent stake was taken up by the International Finance Corporation in May 2005. France's Castel Group already has several collaboration agreements in place with Changyu.

Shanghai-listed Tonghua Wine Grape Co has sold a 29 per cent stake to Hong Kong-based Macro-Link Holdings. And in May 2004 the China International Trust and Investment Corporation (CITIC) expanded its stake in Xinjiang-based winemaker Vini Suntime to 49 per cent with a new capital infusion to stabilize the venture after a period of intense capacity expansion and aggressive market-share acquisition. Part of the new capital will fund a production base in Shandong province.

Grapevine

- Sella & Mosca is the most obvious Italian presence in China at the moment, with its joint-venture winery in Shandong province. It began planting 200 ha of vineyards at Pingdu, about 100 km (62 miles) from Qingdao, in 1998, featuring classic grape varieties (principally Cabernet Sauvignon, Merlot, Chardonnay, and Sauvignon Blanc), as well as Cannonau and Vermentino from Sella & Mosca's Sardinian base. The first wines from the venture (a Chardonnay, a Merlot, and a Cabernet Sauvignon) carry the Catái brand, the name given to the old Chinese Empire by early Italian travellers along the Silk Road.
- Coco Farm Winery, a rather eccentric wine operation in Japan's Tochigi prefecture, continues its search for grape varieties that are a match for Japan's challenging summers. One hope is Madiran's Tannat, suggested by global vine doctor Richard Smart.

- Managing director Bruce Gutlove has hopes for the labrusca variety Norton, and promising results are being achieved with wine from the wild mountain-grape hybrid Shokoshi. Gutlove is also experimenting with barrels made from oak from forests on Japan's northern island, Hokkaido.
- India's Sula Wines continues its breakneck pace of expansion and experimentation. It has opened a second winery and will produce 500,000 bottles in 2005. Sula produced India's first Chenin Blanc. Sauvignon Blanc, and Shiraz wines. It has recently added a Zinfandel blush and is now experimenting with full-bodied Zinfandel, Merlot, and Chardonnay. Owner Rajeev Samant is particularly proud of his first release, Dindori Reserve Shiraz, from grapes grown in new vineyards on red. stony soils on rolling hills with good aspect and drainage.

INCENTIVES SPUR INDIAN WINE INDUSTRY

Maharashtra state. India's leading wine region, has 40,000 ha under vine (two-thirds of the national total), but only a fraction goes into wine. A new incentive package will soon change this. The incentives include 100 per cent exemption from excise duty for 10 years for new wine ventures, simplified licensing provisions, and sales tax relief. Two Grape Wine Parks have been set up to accommodate new wine-related ventures - Godavi Valley Wine Park near Nashik city and Krishna Valley Wine Park near Sangli city. A newly established Wine Board is overseeing industry development and marketing, and a Wine Institute has been formed to train farmers and aspiring winemakers. There are now 24 active wineries, 14 of which have started since the initiatives were launched. A further six are expected to get under way in 2005.

THAI WINE **ASSOCIATION** LAUNCHED

The six largest Thai producers have come together to form the Thai Wine Association. An initial goal is to establish a Thai Wine Charter, setting quality standards. A local wine-awareness and education programme has been launched, and the association will coordinate international promotional activities. A significant subplot is to clearly distinguish the grape-wine industry from the less formalized and greatly varied fruit-wine industry.

The founding members of the association are industry pioneer Château de Loei and newer arrivals Siam Winery, PB Valley Khao Yai, Shala One, Granmonte, and Village Farm (Château de Brumes). Together they employ 1,200 people in Thailand.

UNIQUE WINES FROM JAPAN

The Japan Wine Grape Appreciation Association (Nihon Budo Aikokai) has accelerated its efforts to see fine wine produced from indigenous wild mountain grapes (Yamabudo), building on more than 40 years of viticultural research and vine-breeding work. In 2005, it established a new study group in which growers and 11 participating wineries will work together to produce indigenous grapes on a broader commercial scale specifically for winemaking.

The Shokoshi variety, bred from crossings of Japanese Yamabudo with Himalayan and Russian strains of the mountain grape by the Yamanashibased Sawanobori family, has looked the best candidate so far. Katsunuma Winery produced the first commercial Shokoshi wine, which has a vibrant colour and natural sweetness rarely achieved by the wild grape. Coco Farm is about to follow suit with an impressive release from this variety. A new mountain-grape hybrid variety, called YamaSauvignon (bred from crossing a local Vitis coignetiae with Cabernet Sauvignon) has also just hit the market. Mars Wine, of Nagano prefecture, produced the very promising first commercial release.

Opinion:

Action needed on integrity

Label integrity and formal industry winemaking standards are the compelling issues of the moment in Asia. Although progressives understand that international standards must be met, much of the traditional end of the industry still seems motivated by the convenience provided by ambiguous production and labelling codes. Government remains very much in the background.

A basic issue is origin. Some efforts are being made to reduce the scope for ambiguity by introducing regional AOC systems – for example, in China and Japan. But a bigger issue is country of origin: labelling practices condone the use of imported bulk wine, imported grape must, and imported grapes in 'local' wine.

Grape varieties are increasingly stated on labels, but most countries have no rules governing this – or vintage declarations. Alcohol-content levels stated on labels are unreliable and inaccurate.

Undoubtedly, there are producers who still value the flexibility that lax labelling laws present, but the practices of the few are seriously damaging the status of the increasing number who are deadly serious. Change is on the way, though.

China's official decision to ban a local concoction known as 'half juice wine' from hijacking the name 'wine' is commendable – especially since government action was urged by the industry itself.

In Thailand, the grape-wine industry has come together to establish a Thai Wine Charter that will set it apart from the more informal fruit-wine industry. In Myanmar, the newest wine country in Asia, there is a determined effort to get it right at the outset. An industry charter has already been written in collaboration with the relevant local ministry.

Back to the vineyard

Another big constraint to producing good wine in Asia is the slow emergence of a genuinely wine-focused viticultural tradition. Traditional grape growers are not yet confident enough to commit to the different viticultural practices required for good wine, and wineries are limited (by land-ownership laws, among other things) in the extent to which they can do this themselves. With heavy investment in modern winery equipment now behind them, the next challenge for most Asian winemakers lies in the vineyards, with yield management and ripeness the priority targets.

Vintage Report

Advance report on the latest harvest

2005

India – Late monsoon rains affected early-pruned vineyards, causing lower yields, especially for Sauvignon Blanc. Later-pruned vineyards were unaffected and benefited from a cooler-than-normal ripening period. In Bangalore, everything was proceeding satisfactorily at the time of writing. Thailand – In Khao Yai, rain finished early after pruning in September, resulting in good fruit set and no disease. Mild weather during January and February produced good results in the early harvest; later-harvested fruit, through to April, should also be good if extremely hot weather is averted. It was an exceptional vintage in the Chao Phraya Delta region: very little rain, no disease, and cool weather from November through to harvest in February. Volume was low, but sugar levels were higher than previous years. At Loei, Chenin Blanc looks to be the best in 10 years and Shiraz is looking good, too.

Updates on the previous five vintages

2004

China – Heavy rains in July and August caused widespread mildew outbreaks throughout the north and northeast, especially in Shandong and Hebei provinces, and much fruit was picked far too soon. Huailai was generally affected less by summer rains than other parts of Hebei. Conditions in Shanxi were much better, with good sugar and acid levels and few losses to disease. The northwest was, as usual, dry throughout, but yields were lower. Japan – The year began well with prolonged warm, dry weather after véraison, which saw good early fruit development. But a blitz of typhoons late in the season caused many wineries to take fruit early. For others, fungal disease caused losses in quality and volume. As usual, the valleys fared worst and the more elevated and inland locations did best. India – It was a very good year for whites in Maharashtra and guite good for reds. The cool period extended until mid-February, longer than usual, resulting in slower ripening and more complex flavours. Conditions were very favourable around Bangalore, adding to the region's growing reputation for consistency.

2003

China – Very wet conditions in the eastern provinces (Hebei and Shandong) produced big berries with low sugar and acid levels in most white varieties. though late-maturing reds were generally of good quality, with some better than average. Fungal disease was a problem in most regions and was particularly devastating in parts of Shanxi province. Even in the west, where conditions are generally more amenable, colder and wetter weather than usual impacted adversely on quality. Overall, 2003 was not a good year. Japan – Extensive summer rainfall severely dented yields and kept sugar levels low in all the major regions. A few of the later-picked varieties saw some recovery when rains eased late in the harvest in some locations – in Yamanashi and the Komoro district of Nagano, for example. But, overall, it was a poor year and the wines generally suffer from suppressed natural flavours and colours.

India – Vintage was over early in Maharashtra. Warmer weather throughout the ripening period and a weaker monsoon season saw fruit ripening early, relatively free of disease. Sauvignon Blanc and more aromatic wines are not as intense as in some years, but the reds have lots of flavour and colour. In Bangalore, conditions were close to ideal.

Grapevine

- Indian liquor giant Shaw Wallace Distillers has formed a separate wine division and has announced plans to get back into the wine game seriously. It had closed its winery in Andhra Pradesh following the imposition of prohibition laws in 1994. Production of its top-selling Golconda Ruby Wine has been maintained at its winery in Karnataka, drawing on supplies of Bangalore Blue (Isabella) grapes from farmers in various locations. But now it wants to build a premium brand to leverage its powerful marketing and distribution clout to tap the rapidly growing domestic market for wine.
- At Japan's second national wine show, held in Yamanashi in July 2004, a panel of local and international judges awarded 4 gold medals, 14 silver, and 123 bronze. This compared with 2 gold, 21 silver, and 103 bronze
- at the inaugural show in 2003. Of the four gold medals awarded, all were for classic Vitis vinifera wines. The winners were Château Mercian Hokushin Reserve Chardonnay 2002, Sapporo Grande Polaire Furusato Cabernet Sauvignon 2000, Kumamoto Wine Night Harvest Chardonnay 2003, and Hayashi Farm Kifugo 1997 (sweet white wine). It was mildly surprising that there was not a Koshu wine among the gold medallists, but it is a good indication of the rapidly improving standard of Koshu wines that, of the 95 entries in this category, 70 survived the elimination round, Of these, four won silver medals and 26 won bronze medals.
- Thailand's PB Valley Khao Yai winery, which launched with Shiraz and Chenin Blanc wines, is releasing a straight Tempranillo and a Colombard under a new label, Pirom, in 2005.

2002

China – Grapes were very late to ripen in China's Hebei province, but wineries that could delay picking produced wines with good flavour and colour. Grape growers in Shandong province made even better use of the cooler and drier conditions, achieving desired sugar levels and robust colouring, with very little rot.

Japan – Conditions were very good in Japan's main regions, Yamanashi and Nagano. There were a few typhoons in the early summer but no damage to vines or fruit. With sustained sunshine and little rain late in the season, the vineyards enjoyed much lower levels of rot, encouraging growers to wait for optimal ripeness before picking.

India – A weaker-than-usual monsoon season delivered drier-than-normal conditions, which favoured even ripening patterns and made rot more manageable. The white varieties came off well in Bangalore, as did most of the reds. In Maharashtra, it was an excellent year, with slow, even ripening.

200 I

China – Vintage conditions were generally very good. Extended dry spells during a late ripening period in Hebei permitted fruit to develop good sugar levels and colour, although some vineyards sustained hail damage. Part of Shandong suffered both late spring frosts and summer hailstorms, so yields were reduced. Shandong also had fungal-disease problems brought on by late rains.

Japan – Both Yamanashi and Nagano had an excellent vintage. The wines are generally softer and more fully flavoured than usual, reflecting unusually good ripening conditions.

India – A very good year, with slow, even ripening conditions and a relatively dry harvest.

2000

China – In Hebei and Shandong, long dry periods during ripening and harvest provided most growers some welcome relief from the usual fungaldisease problems.

Japan – Yamanashi and Nagano had a good year, though it was better in the former than the latter. Nagano's Kikyogahara district, renowned for its Merlot and Cabernet, had an average year.

India – An excellent year in Bangalore, where light rains in the late ripening period brought temperatures down and assisted flavour concentration.

GREATEST WINE **PRODUCERS**

- Château Mercian (Japan)
- 2 Dragon Seal (China)
- Suntory (Japan)
- Grace Winery (Japan)
- Sapporo (Japan)
- 6 Changyu (China)
- Great Wall (China)
- Manns Wine (Japan) Dvnastv (China)
- 1 Indage (India)

FASTEST-IMPROVING PRODUCERS

- Matsunuma Winery (Japan)
- Château de Loei (Thailand)
- Hayashi Noen (Japan)
- 4 Izutsu (Japan)
- Okuizumo (Japan)
- 6 Coco Farm (Japan)
- Grover Vinevards (India)
- Takahata (Japan)
- Weilong (China)
- Matten (Bali, Indonesia)

NEW UP-AND-COMING PRODUCERS

- Vini Suntime (China)
- Domaine Sogga (Japan)
- Tsuno Wines (Japan)
- 4 Sula (India)
- Shanxi Grace (China)
- Granmonte (Thailand)
- 7 Yamazaki (Japan)
- B PB Valley Khao Yai (Thailand)
- Asahi Yoshu (Japan)
- Shidax Château TS (Japan)

BEST-VALUE PRODUCERS

- Dragon Seal (China)
- Tsuno Wines (Japan)
- Château Mercian (Japan)
- 4 Sula (India)
- Grace Winery (Japan)
- Grover Vineyards (India)

- Sapporo (Japan)
- 8 Hayashi Noen (Japan)
- Siam Winery (Thailand)
- Dvnastv (China)

GREATEST-OUALITY WINES

- Private Reserve Kikvogahara Merlot 2000
 - Château Mercian, Japan (¥10,000)
- Tsutaishizaka Chardonnav **2002** Suntory, Japan (¥5,010)
- Grande Polaire Nagano **Furusato Vinevard Cabernet** Sauvignon 2000 Sapporo, Japan (¥5,010)
- Private Reserve Hokushin Chardonnay 2002 Château Mercian, Japan (¥6,000)
- **⑤** Cru de Huailai Cabernet 2003 Dragon Seal, China (Rmb 300)
- 6 Shimane Chardonnay 2002 Okuizumo, Japan (¥3,150)
- Cuvée Misawa Private Reserve Cabernet/Merlot 2002 Grace Winery, Japan (¥10,000)
- Marquise de Pompadour Méthode Traditionnelle Sparkling NV Indage, India (Rp 720)
- Solaris Chikumagawa Nagano Merlot 1998
- Manns Wine, Japan (¥3,510) Celebration Syrah 2002 Granmonte, Thailand (THB 610)

BEST BARGAINS

- Unwooded Chardonnay 2004 Tsuno Wines, Japan (¥2,200)
- Yamagata Merlot 2001 Takahata, Japan (¥2,636)
- Koshu 2003
 - Shidax Château TS, Japan (¥1,500)
- Petite Grande Polaire Hokkaido Late Harvest Kerner **2003** Sapporo, Japan (¥1,510)
- **⑤** Celebration Chenin Blanc 2002 Granmonte, Thailand (THB 610)

- 6 Kodarujikomi Koshu 2002 Château Mercian, Japan (¥2,100)
- Sauvignon Blanc NV Sula, India (Rp 450)
- Estate Rosé 2002 Shanxi Grace, China (Rmb 70)
- Cabernet/Shiraz NV Grover Vineyards, India (Rp 450)
- Dry White (Longyan) NV Great Wall, China (Rmb 35)

MOST EXCITING OR UNUSUAL FINDS

- Tasva's Reserve Cabernet Franc 2001 Shanxi Grace, China (Rmb 200) The only straight Cabernet Franc commercially available in China, a new addition to the range for this qualityfocused winery in newish wine region Shanxi province.
- J-Fine Merlot/Muscat Bailey A 2000 Château Mercian, Japan (¥1,510) Merlot from Nagano and MBA from Yamanashi combined in this second release of a groundbreaking blend. Much more forward and fruity than most Japanese Merlots and bound to be imitated by others.
- Monsoon Valley Rosé 2003 Siam Winery, Thailand (THB 385) A judicious combination of Malaga Blanc, Black Muscat, and the mysterious local red grape Pokdum, from vines in the 'floating' vineyards on the Chao Phraya delta around Bangkok.
- Reserve Syrah 2003 Château de Loei, Thailand (THB 1,200) Syrah (Shiraz) has become the red-wine staple of the Thai wine industry, and this reserve release sets a high standard with, surprisingly, some of the white-pepper characteristics associated with cool-climate Shiraz.

- Yama Sauvignon 2003 Mars Winery, Hombou Shuzo, Japan (¥2,100) An intriguing and very new variety, bred in Japan through a crossing of the indigenous wild mountain grape Yamabudo and Cabernet Sauvignon. There are less than 10 ha growing in Japan.
- Sangiovese/Merlot 2002 Domaine Sogga, Obuse Winery, Japan (¥3,675) Style-setting blend from one of lapan's most innovative young winemakers, who has grafted a winemaking operation on to the family's longestablished sake business.
- Syrah/Cabernet Sauvignon 2003 Dragon Seal, China (Rmb 230) An Australian-inspired blend: a first for this winery and a first for China.
- Koshu Kiiroka 2004 Château Mercian, Japan (¥2,300) First release of a new-style Koshu that captures more of the traditional elegance that this variety can produce when handled with restraint.
- Pinot Noir 2003 Dragon Seal, China (Rmb 80) First release for this winery, one of only three Pinot Noir wines in China.
- Cabernet Sauvignon 2001 Shidax Château TS, Japan (¥2,300) Actually a blend, with 20 per cent Merlot and 5 per cent Petit Verdot. One of very few wines in Japan using Petit Verdot.

Grapevine

• Bali wine pioneer Hatten Wines celebrates its 150th vintage in 2005. Although only 10 years old, its year-round supply of Alphonse Lavallée (red) grapes allows Hatten to have as many as 12 vintages in a single year.