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Growth patterns 葡萄酒國崛起

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With consumption falling in many European countries, and despite a government crackdown on excess, China is not only storming up the table of wine-loving nations, but increasingly a producer in its own right. 儘管許多歐洲國家的消費能力隨經濟下滑，中央政府亦盡量節縮開支，但中國不僅一躍成為葡萄酒消費大國，更憑藉自己的力量逐漸成為葡萄酒生產國。 **By Robin Lynam**

Until 1978 and the introduction of Paramount Leader Deng Xiaoping's open-door policy in China, most Western-style grape wine consumed in the country was drunk by foreign diplomats in embassies. No longer. China, including Hong Kong, is now the fifth-largest market in the world for wine – just after Germany and immediately ahead of the United Kingdom. It has also emerged as a major producer.

“A lot of wineries have started in China in the last 10 years or so,” says Judy Chan, president of Grace Vineyard, one of the most successful of the quality-focused Chinese producers. Headquartered in Shanxi province, the winery also has vineyards in nearby Ningxia Autonomous Region. “In the earlier days people wanted to go for size, but currently in Ningxia there’s a preference for boutique or garage wineries.”

Most of the wine made in China is also drunk there, and at a time when consumption is dropping in many countries, producers regard the potentially vast market as a beacon of hope. According to research carried out for wine trade-fair organiser Vinexpo by the IWSR (a leading global analyst in the alcoholic beverage market), between 2010 and 2014 consumption of wine in China rose by 21.4 per cent. Among other markets in the current top five during the same period, demand rose by 9.4 per cent in the United States but fell by 3.8 per cent in France, 7.7 per cent in Italy and 3.9 per cent in Germany. It also dropped by 5.6 per cent in the UK.

GRACE VINEYARD

中國最高領導人鄧小平於1978年提出對外開放政策之前，中國的葡萄酒消費市場以外國使館的外交官為主。不過，情勢逆轉，現在中國（包括香港）已經成為全球葡萄酒的第五大市場，排名次於德國，並超越英國。同時，中國也正逐漸冒起成為葡萄酒的主要生產國。

怡園酒莊總裁陳芳說：「大概自10年前開始，很多酒廠在中國湧現。」中國芸芸注重質量的釀酒商中，她的酒莊是其中最出色的一家。總部設在山西省，酒廠在附近的寧夏自治區也擁有葡萄園。她接著說：「最初人人都想建立大型酒莊，但現在更多寧夏人選擇經營規模較小的精品或車庫酒莊。」

中國釀製的葡萄酒大部分只夠供應本地市場。事實上，由於不少其他國家的葡萄酒銷量都在下跌，釀酒商均視這潛力巨大的市場為希望之光。根據國際葡萄酒與烈酒數據分析公司IWSR，為葡萄酒貿易展覽會主辦商Vinexpo進行的研究顯示，中國的葡萄酒消費在2010至2014年之間增長了21.4%。與其他五大市場比較，美國的同期需求上升9.4%，但法國下跌了3.8%，意大利及德國分別下降7.7%和3.9%，英國亦減少了5.6%。

導致這種下降模式其中一個原因，可能是過量飲酒影響健康的顧慮。不過，紅酒在中國經常被視為有益健康，這「信念」大概與前中國國務院總理李鵬在1996年出席第八屆全國人民四次會議時所說的話有關，當時他表示：「喝點果酒不但對人的身體有益，還能減少糧食消耗，對社會風氣的好轉也有好處。」

Growth 葡萄酒國崛起 patterns

One reason for this pattern of decline is the perception that excessive consumption of alcohol is a health risk. In China, however, red wine has largely been seen as a health positive. Thanks for this must partly go to Li Peng, who was premier of the People's Republic in 1996, when he toasted the National People's Congress with red wine and proclaimed, "Drinking fruit wines is helpful to our health, does not waste grain and is good for social ethics."

Meanwhile, although quality red wine – especially Bordeaux – is a status symbol in China (and the wealthy there drove up prices internationally), expensive wine is now an indulgence to be avoided, a result of the crackdown on corruption and conspicuous consumption that has caused demand for top-dollar wines to drop sharply. "Premium-wine buying has stopped already," says Thomas Yip, a veteran wine importer in Asia. "You can't give expensive wine to anybody. You can't even go to expensive private clubs and drink it."

Yip played a major role in China's obsession with Bordeaux. He began promoting the region on the mainland in the early 1980s, when buying wines for the Jianguo Hotel in Beijing, then managed by Hong Kong's Peninsula Group, and went on to form his own Hong Kong-based company, Topsy Trading, in 1983. There were good reasons why he chose Bordeaux over, say, Burgundy, the Rhone, Spain or Italy. Wine is a complex subject, and the Bordeaux classification system provided an assurance of quality that was easy for wine novices to grasp. The main reason, however, is that they were the wines he wanted to drink.

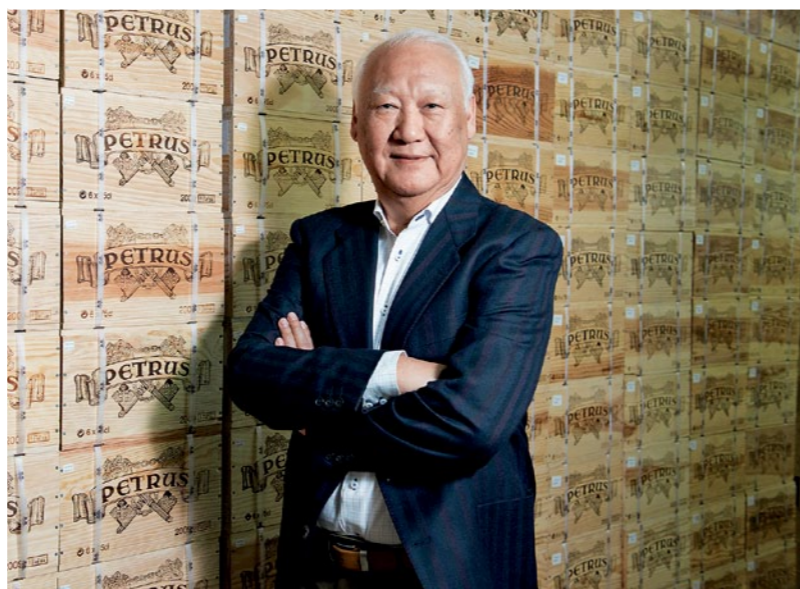
"It's a passion. I love Bordeaux wines. They have their own charm and every year is different," says Yip, who currently holds one of the largest reserves of fine wine in the world. "Even today, we always hold at least 1.5 million bottles in our warehouses."

Business, however, is not what it was, and Yip states frankly that he believes it is unlikely to recover. "It looks like a growing market and that there should be huge demand. On the other hand, it's so difficult," he says. "Over the last three years, rich people in China have purchased more than 100 Bordeaux chateaux. If one chateau produces, say, 20,000 cases, that's two million cases of wine, and they're going to bring it to China and give it away to friends. People have no incentive to purchase."

That may be true of the fine-wine end of the market, but Hong Kong-based wine consultant Debra Meiburg MW points out that for exporters of less extravagantly priced bottles there are still many opportunities. "Last year saw around a 50 per cent increase in the imports of Australian bottled wine to China, with high-quality, mid-range bottled wines experiencing considerable growth. Classic labels like Penfolds are managing to fill the gap in demand for quality, but without the hefty price tags of Bordeaux," she says.

Australia is not the only beneficiary of changing market circumstances. In 2015, both Spain and Chile achieved double-digit growth in their exports of bottled wine to China. Interest in Burgundy and Italy is also growing. Red wine – and it is still mostly red that China drinks – doesn't have to come from Bordeaux anymore.

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這是一種激情。我喜歡波爾多紅酒。即使到了今天，我們的倉庫依然隨時有至少150萬瓶的存量
– Thomas Yip



雖然優質紅酒，尤其是波爾多出品，在中國被視為身分的象徵（內地富豪使紅酒的國際價格大幅上升），但如今內地嚴打貪腐與過度消費，令昂貴紅酒的需求驟降，這種享受頓時變成必須避諱的活動。亞洲老牌葡萄酒進口商葉福章說：「現在已經沒人買頂級紅酒，採購活動早已停止。你不能把貴價酒當禮物送給任何人，甚至不能到高級消費場所，如私人會所享受頂級佳釀。」

中國市場情迷波爾多紅酒的風氣，葉福章扮演了重要的推動角色。1980年代初期，他為香港半島集團管理的北京建國酒店採購紅酒，這時他已開始在內地推廣這個產區，其後在1983年創立福堯貿易有限公司。說到為何偏愛波爾多紅酒，而非勃艮第、羅納、西班牙或意大利等其他地區的出品，葉福章表示他自有理由。紅酒是一門複雜的學問，波爾多分級制度提供了初學者容易掌握的優質保證。但他表示，最主要的原因在於那是他自己喜愛喝的紅酒品種。

目前葉福章是世上其中一個擁有最多頂級紅酒的收藏者，他說：「這是一種激情。我喜歡波爾多紅酒。他們擁有獨特魅力，每年都不同。即使到了今天，我們的倉庫依然隨時有至少150萬瓶的存量。」

然而，現在的業務已今非昔比，葉福章坦言不太可能回到以往的盛況：「整個市場看起來好像正在成長，需求應該很強烈。但從另一方面來看，經營卻非常艱難。過去三年，中國富豪收購了逾100間波爾多酒莊。如果一間酒莊的產量是兩萬箱，等於他們每年會把兩百萬箱紅酒帶回中國，送給親朋。所以沒人願意買酒了。」

他此番言論或許真實反映了頂級葡萄酒市場的現狀，不過在香港擔任顧問的葡萄酒大師Debra Meiburg卻有不同看法，她指出相較於天價等級的紅酒，專營其他



Grace Vineyard produces two of the few Chinese wines to have achieved critical acclaim internationally: its flagship Deep Blue and a grand vin called Chairman's Reserve. Both are available in many five-star hotels in China, and in outlets in Singapore, Japan and the UK, but the winery is also focused on producing affordable, easy-drinking wines such as its People's series, and pioneering a wider range of grape varieties under its Tasya's Reserve label.

"One of our goals is to discover what to plant and where to plant," Chan says. "Tasya's is a result of an experiment. Last year we launched Aglianico, Marselan and Shiraz. I think now the direction is to produce wine locally in China that has its own character."

The IWSR forecasts growth of only 3.8 per cent between 2015 and 2019. However, the market is still growing, and Chan believes a culture of wine appreciation is spreading. As for China's development as an exporter of wine, she thinks a little patience will be required.

"It will take more than 10 years," Chan says. "Chinese wine doesn't exist in a vacuum. It exists in the context of China. The overall image of China will affect the wine category as well."

THIS PAGE: GRACE VINEYARD

價位洋酒的出口商依然有許多商機。她指出：「去年，中國進口澳洲瓶裝葡萄酒的數量錄得50%增長，其中以高品質的中等價位瓶裝葡萄酒的增長最為可觀。例如奔富（Penfolds）這類老牌酒廠，既可滿足市場對優質紅酒的需求，而且價格比波爾多平易近人得多。」

澳洲並非唯一因市場變化而受惠的地區。2015年，西班牙和智利出口至中國的葡萄酒數量也取得雙位數字增長，針對勃艮第及意大利葡萄酒的興趣亦見成長。儘管中國消費者目前仍以飲用紅酒為主，但已經不一定非波爾多不喝了。

怡園酒莊亦出產了兩款獲得國際好評的中國紅酒，包括旗艦酒品「深藍」及頂級的「怡園莊主珍藏」。中國多間五星級酒店均供應這兩款酒，同時亦出口到新加坡、日本和英國，但酒莊亦著重生產價位較低，容易入口的葡萄酒，如民星系列；並為其怡園珍藏系列開發更多不同的葡萄品種。

陳芳說：「我們的目標之一是找出要種什麼和應該種在哪裡。怡園珍藏系列是連串實驗的結果。去年我們推出了Aglianico、Marselan和Shiraz等葡萄酒。我想，現在的發展方向是在中國生產擁有自己特色的本地葡萄酒。」

按IWSR的估算，中國葡萄酒市場在2015到2019年的增長率約為3.8%，雖然比例下降但仍有增長，陳芳亦相信品鑑葡萄酒的文化將會比以前更為普及。不過若言中國發展至成為葡萄酒出口國，她認為還需要一點耐性。

陳芳說：「我相信發展至這地步需要超過10年時間。中國葡萄酒不能脫離現實，需要在中國的環境下茁壯。此外，中國的整體形象亦會影響本地葡萄酒等級。」

This page: Wine importer Thomas Yip
Opposite: Judy Chan, president of Grace Vineyard, and views of the vineyard entrance and guest house

本頁：紅酒進口商葉福章
對頁右上圖起順時針：
怡園酒莊總裁陳芳；
怡園酒莊大門、接待室
及建築外觀