Production and Consumption of Wine in Japan

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Meiji Government encouraged the wine production as a part of the Industry development policy

In 1874 Mita breeding station was established. introduced vines from Europe and the USA, distributed them to many regions in Japan.

In 1884 infected by phylloxera
Meanwhile, the wine was not consumed. Many wineries stopped their business.

Placing sweetened wine on the market and the expansion of its consumption
During the war, the tartaric acid was needed for radiodetector. The wine making survived.

Start of consumption of real wine in late 1960’s
Due to the higher standard of living and the change of dietary pattern, the consumption of real wine started in Japan, Triggered by Tokyo Olympic Games of 1964 and by Osaka International Exhibition of 1970.
## Evolution of wine supply and consumption in Japan

<table>
<thead>
<tr>
<th></th>
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<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Domestically Produced wine</strong></td>
<td>360</td>
<td>700</td>
<td>640</td>
<td>800</td>
<td>810</td>
<td>830</td>
</tr>
<tr>
<td><strong>Imported wine</strong></td>
<td>120</td>
<td>670</td>
<td>820</td>
<td>1,610</td>
<td>1,570</td>
<td>1,630</td>
</tr>
<tr>
<td><strong>Total supply</strong></td>
<td>480</td>
<td>1,370</td>
<td>1,480</td>
<td>2,410</td>
<td>2,380</td>
<td>2,460</td>
</tr>
<tr>
<td><strong>Consumption/adult (HL/year)</strong></td>
<td>6</td>
<td>15</td>
<td>15</td>
<td>23</td>
<td>23</td>
<td>24</td>
</tr>
</tbody>
</table>
## Wine production and consumption in Japan

### 2008

<table>
<thead>
<tr>
<th>Type of wine</th>
<th>Volume of wine</th>
<th>Share</th>
<th>Producers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic wine produced by Japanese grapes</td>
<td>250 KHL (150 KHL produced by grapes grown by farmers)</td>
<td>10.1%</td>
<td>Large and small wineries</td>
</tr>
<tr>
<td>Domestic wine produced of imported materials</td>
<td>580 KHL</td>
<td>23.6%</td>
<td>Mainly large wineries</td>
</tr>
<tr>
<td>Imported wine</td>
<td>1,630 KHL</td>
<td>66.3%</td>
<td>Large and small importers</td>
</tr>
<tr>
<td>Total</td>
<td>2,460 KHL</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>
# Concentration of wine production

(ottomically produced wine)

Monthly report of statistics of liquors and foods

<table>
<thead>
<tr>
<th></th>
<th>1997 %</th>
<th>1998</th>
<th>1999</th>
<th>2000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mercian</td>
<td>26.0</td>
<td>25.6</td>
<td>23.2</td>
<td>29.0</td>
</tr>
<tr>
<td>Suntory</td>
<td>23.7</td>
<td>22.2</td>
<td>21.5</td>
<td>26.3</td>
</tr>
<tr>
<td>Sapporo</td>
<td>9.3</td>
<td>10.2</td>
<td>8.5</td>
<td>9.5</td>
</tr>
<tr>
<td>Manns</td>
<td>8.4</td>
<td>9.9</td>
<td>8.5</td>
<td>9.5</td>
</tr>
<tr>
<td>Sainte neige</td>
<td>4.6</td>
<td>4.4</td>
<td>5.3</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td>27.5</td>
<td>23.9</td>
<td>20.4</td>
<td></td>
</tr>
</tbody>
</table>
Improvement of quality of Japanese wine

Efforts to make good wine under the conditions of Japan

• Recognition of need of European varieties (vitis vinifera) to produce good wine.
  Introduction of vitis vinifera and trial of cultivation by large wineries
  Transfer of technology and know-how to small wineries
  Selection of suitable land, soil improvement (deacidification, drainage)
  Cultivation methods and management (trellis training, espalier training, pruning)
  Prevention of adverse effect of rain (rain cut, multi)

• Identification that some varieties are possible to cultivate, to produce good wine.
  Well adapted: Merlot, Cabernet sauvignon, Petit verdot, Chardonnay
  Still difficult: Pinot noir, Rhine reisling
Improvement of quality of Japanese wine
Its character attributed to origin

Formation of the notion of appellation d’origine
- Consumers appreciate quality and originality of Japanese wine
- As far as pursuing high quality, character attributed to the region has been observed

Combination of names of origin and grapes in labelling
- Conjunction of the notion developed in Europe and the notion developed in the new world
- Example:
  Kikyogahara Merlot, Hokusin Chardonnay, Higashiyama Cabernet sauvignon

Revitalization of regional wineries
- Revitalization of older regional wineries and new comers (vignerons) in regions, who are eager to produce high quality Japan’s wine
- In large wineries, strengthening of high quality wine by 100% of grapes in Japan
  Total number of wineries: 247 in 2010

Possibility of export of high quality Japan’s wine
### Main regions in East of Japan

<table>
<thead>
<tr>
<th>Region</th>
<th>Main grape varieties</th>
</tr>
</thead>
</table>
| **Nagano** | • Shiojiri  
|          | • Hokusin  
|          | • Toshin  
|          | • Matsumoto, Azumino                                                                  |
|          | Merlot、Niagara, Concord  
|          | Chardonnay、Cabernet sauvignon、Merlot  
|          | Chardonnay、Cabernet sauvignon、Merlot、Zenkoji  
|          | Cabernet sauvignon、Merlot、Chardonnay、Niagara、Concord、Kerner |
| **Yamanashi** | • Katunuma, Enzan  
|          | • Koufu, Kai  
|          | • Hokuto  |
|          | Kosyu、Cabernet sauvignon、Muscat bailey A  
|          | Petit verdot  
|          | Kosyu、Merlot、Chardonnay、Muscat bailey A,  
|          | Kosyu、Chardonnay、Cabernet sauvignon |
| **Niigata** | • Iwanohara  |
|          | Muscat bailey A |
| **Yamagata** | • Kamino yama, Zao  |
|          | Cabernet sauvignon、Merlot、Chardonnay、Black queen, Pinot noir、Muscat bailey A |
| **Hokkaido** | • Yoichi  
|          | • Otaru  
|          | • Tokachi  |
|          | Muller thurgau、Kerner、Zweigeltrebe、  
|          | Baccus、Delaware  
|          | Kiyomi, Yamasati、Kiyomai、Zweigeltrebe、 |
Appreciation of Japanese traditional grape varieties

**Kosyu**  
*Vitis vinifera*  
Traveled the silk road from Caucasus to China, then to Japan (about 1000 years ago)  
Since around 17th century, commercial production as table grape in Yamanashi.  
In 2010, registered in the OIV grape variety list

**Zenkoji**  
Origin in north China

**Wild species**  
17 species

**Muscut bailey A**  
Hybrid between *vitis vinifera* and *labrusca*  
Zenbei Kawakami developed this variety in 1927  
Well adapted to Japanese environment
Kosyu variety \textit{(Vitis vinifera)}

Transferred to Japan around one thousand years ago
Koshu variety and Koshu wine (white)

Characteristics of grape:
Late maturing, skin colour; pink or subtle purple, Resistant to diseases, tolerant to humidity

Quality improvement of wine:
Late 19th century, wine making started.
For recent 30 years, efforts of improvement of cultivation and vinification (barrel maturation, surlie, etc), supported by Pr Dubourdieu and others

Characteristics of wine:
Fresh and fine, delicate structure, slightly astringent and bitter, citrus flavour
Goes well with Japanese cuisine (no damage to the fragile taste of Japanese cuisine).
Export:
In 2004, export started to the USA and Europe after trial export.
In 2010, export promotion in the UK.

Others:
Appropriate labelling as quality wine in the EU market is being studied.
Problems concerning wine in Japan

(1) High cost of growing grapes in Japan

High cost of growing grapes in Japan

- Cost of production of grapes in Japan is comparatively high
- Japanese grapes are in a severe competition with imported juice
- Share of wine produced of Japanese grapes is only 10%

Retrograde development of supply of grapes by farmers

- Farmers are facing setbacks in production of grapes
- Wineries tend to prefer to own their proper vineyards
- Due to the limitation of Agricultural Land Law, it is still difficult

Wine produced of Japanese grapes should be high quality

- Further efforts for high quality wine are needed, while we can now expect to produce high quality Japanese wine
Supply of grapes by farmers

Retrograde development of supply by farmers

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>02</th>
<th>03</th>
<th>04</th>
<th>05</th>
<th>07</th>
<th>08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hokkaido</td>
<td>2390</td>
<td>2326</td>
<td>2200</td>
<td>2252</td>
<td>2403</td>
<td>2282</td>
<td>2373</td>
</tr>
<tr>
<td>Yamanashi</td>
<td>4040</td>
<td>4190</td>
<td>3897</td>
<td>3481</td>
<td>2788</td>
<td>3826</td>
<td>3154</td>
</tr>
<tr>
<td>Nagano</td>
<td>3922</td>
<td>2512</td>
<td>3555</td>
<td>2690</td>
<td>4204</td>
<td>4350</td>
<td>4481</td>
</tr>
<tr>
<td>Japan total</td>
<td>20184</td>
<td>16509</td>
<td>16779</td>
<td>15360</td>
<td>15002</td>
<td>15838</td>
<td>14865</td>
</tr>
</tbody>
</table>

Survey of particular fruits by MAFF in 2007

Increase of production in winery’s farming land

Intention of growing good grapes for wine
The production in winery’s land is estimated to be 10,000 tons in 2008
Problems concerning wine in Japan (continued)

(2) Institutional problems

Liquor tax law regulates the wine only for the purpose of imposition of tax.
  • Any specific legal definition of wine does not exist (Fruits liquor)

The system of GI does not function well. There is not any registration of GI for wine at the moment.
  • Japanese high quality wine is regarded as ordinary wine in overseas market (in particular, in European market, not allowed to label origin).

No legal standards for labelling
  (Voluntary standards by some groups of the industry exist)
Conclusion

Wine consumption has been well integrated in dietary habit.

Imported wine and materials meet dominantly the consumption of wine, and this trend will not change.

Quality of Japanese wine has been improved remarkably in recent years and its character is attributed to regions.

Under the intensified globalization, Japanese wine should be of high quality.

Introduction of wine law including the GI system and labeling standard is needed.