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In the past few years there has been a huge structural change in the way wine is delivered to those who drink it. Britain, for example, is the most important market for Australia, one of the world's most enthusiastic wine exporters. In 2008, fewer than three in every 10 bottles of Australian wine on British shelves contained wine shipped from Australia in bulk rather than in bottle. Four years later, that figure was eight in every 10, and the total amount of wine shipped out of Australia in bulk overtook the volume exported in bottle.

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Australia is far from the only country to ship substantial quantities of wine sloshing around in a tank inside a container rather than neatly sealed in bottles. Spain and Italy export far more wine in bulk than any non-European wine producer, and 65 per cent of all South African wine exports last year were in bulk. Chile, too, is an enthusiastic exporter of bulk wine and earns the highest average price per litre. According to the Organisation Internationale de la Vigne et du Vin (OIV), from 2005 to 2012 the total volume of wine shipped around the world in bulk rose 61 per cent to represent more than 40 per cent of all exported wine.

That date, 2005, is significant. This was when Britain's big retailers and food producers signed the Courtauld Commitment to reduce packaging waste, which dramatically increased the proportion of wine brought into the country unencumbered by heavy glass packaging. Those who study the back labels of supermarket wines would have noticed more and more British addresses, often heavily disguised or abbreviated, signifying a British wine bottler. (At that stage, corks were still used for basic wine, and those inserted into bottlenecks in Britain were easily identifiable by their numerical code and a "W".)

But what started as a commitment to sustainability - some claim a reduction of 42 per cent in carbon footprint - quickly became a drive by the UK supermarket giants to maintain margins. This was accentuated in 2008 when Alistair Darling, then Britain's finance minister, introduced the sneaky "alcohol duty escalator" whereby wine duties are increased by 2 per cent above inflation each year without explicit notice in the annual Budget. Shipping their own-label branded wines in bulk helped shave valuable pennies off the retailers' costs and allowed them to stick to their price points, while driving ever harder bargains with their suppliers as duty rose. (The Wine & Spirit Association is mounting a campaign, Call Time on Duty, to have the duty escalator scrapped.)

The big beneficiary of this change in wine transport has been a hangar in Avonmouth in southwest England that is the size of 12 football pitches. It belongs to Accolade, the private-equity-owned **company** that swept up all the UK and Australian subsidiaries of Constellation when what was the world's biggest wine **company** decided to concentrate on its original American sphere of influence. Hardys, Banrock Station and Kumala are some of Accolade's better-known brands. The new **company** bet that the switch to bulk shipping to the UK would continue and broke ground for Accolade **Park** in 2007. The first bottles rattled off the bottling lines in 2009 and they now fill 720,000 bottles a day.

As well as bottling all but the poshest Accolade wines **sold** in the UK, and those **sold** in Scandinavia and Britons' holiday destinations in Spain, Accolade bottles all Morrison's own-label wines and is steadily

poaching Tesco's business from rival bottlers Kingsland of Manchester, which has started up its own wine-sourcing division. Another rival, IPL in Norfolk, is owned by Asda, whose scheme to concentrate on "three for £10" has just been abandoned. Sainsbury's now uses the second-biggest UK bottler, Quinn Glass in Cheshire, which bottles a much wider range of drinks than Accolade.

Accolade prides itself on being so wine-centric that every permanent employee has a wine qualification. The staff member who managed to get through the Master of Wine exams, the wine trade's stiffest, is referred to by **site** manager Richard Lloyd as "our hero, Barry Dick MW". Lloyd could not be prouder of his eerily clean **site**, which is a bit like a gym for giants. During my visit, my head spun with the quality assurance statistics that Lloyd was so proud of. He and his team have "huge respect" for the other specialist wine bottler, Greencroft of Durham, but clearly revel in their own greater size. (Out of all these UK bottlers, you will note that only Accolade has an address remotely near a port - but apparently even Avonmouth isn't deep enough, so most of their wine is landed 220 miles away in Felixstowe.)

The wine typically arrives in a giant plastic bladder known as a "flexitank" within a fixed frame. Lloyd is tickled pink that his staff devised a unique pump-and-tilt system for getting the last 150 litres out of each container and quotes wastage tolerances with enthusiasm. The used, wine-soaked bags are eventually shredded and turned into traffic cones.

But what may have been good for Avonmouth - and the planet - has been bad for Australia and other major wine-exporting countries, with their mothballed bottling plants. The big international bottle producers have merely switched their supply bases - but in countries such as South Africa, bulk shipping has hit employment hard. The trend to bulk shipping for all but the finest wine shows no signs of abating, and the likes of Richard Lloyd and Barry Dick would be delighted to explain in detail to you why it does **commercial** wine no harm at all.

**China**'s newfound love of wine (but not wine laws) presents enormous opportunities for exporters of wine in bulk. Chile is expected to benefit from a trade agreement in which **China** will slash its import duty on Chilean wine from 43 per cent by value to zero next year.

It is perhaps not surprising that the UK and Germany are two of the three most important importers of bulk wine: they are countries that consume far more wine than they produce. The statistical surprise is that France is one of the world's top three importers of bulk wine. I leave you to figure that one out.

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#### Alternative wine packaging

Nothing beats glass for subtle, complex wines designed to age for decades, but for wines that will be drunk within a few months (and according to some estimates 90 per cent of all wine bought in the US is consumed within 24 hours), it may be considered a heavy, fragile waste of resources. The following alternatives are worth considering:

- Cans: much lighter and less fragile than glass. OK for the short term but if the anti-acid lining is less than perfect, the wine can deteriorate rapidly.
- Cartons: especially popular for basic wine in South America, these have the advantage of lightness, sturdiness and prolonged shelf life. Tetrapaks weigh only about 10 per cent of the equivalent bottle size.
- Plastic PET bottles: indestructible and light but can only be "downcycled" (eg to textiles) rather than recycled and the worst can impart a plasticky taste. Wine keeps for up to two years in the best examples, which use only one-10th as much energy as glass bottles.
- Pouches: light, convenient. Wine keeps fresh for up to four weeks after opening but relatively high levels of preservatives are needed.
- Bag in box: handy for big parties or big drinkers but, largely thanks to non-airtight taps, the wine stays fresh for four weeks maximum once the package is breached.

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