

WHO'S WHO IN THE UNITED STATES

Californian journalist Larry Walker compiled this survey from questionnaires sent to 300 key members of the trade. The results show that despite the scale of the United States' market, someone who is very good at what they do is bound to get noticed. But as always, we expect the list to generate heated discussion.

The year 2007 marked the fourteenth straight year of growth in the US wine market. The adult per head consumption of 3.02 gallons (12 litres) is at an historic high, with 269m cases consumed. The gains since 2000 have been led by Millennial drinkers, young adults of 30 and under, who have taken to wine. These consumers are eager for new taste experiences in wine and are a key reason why the market for imported wines has grown to over 30%. The 'Millennial kids' are not only drinking wine, they are also pushing the cocktail boom.

The market is fiercely competitive, with the top three wine companies – Gallo, Wine Group and Constellation – shipping 82% of all wine. That leaves another 5,500 wineries fighting for the scraps. For small producers, distribution is tough, with the 10 largest distributors controlling 90% of the market. This has led to greater interest in direct marketing to consumers through the Internet, as well as to the growth of wine clubs and direct sales to local outlets.

Competition is likely to become even more intense as the US moves toward being the world's largest wine market. Even the weakness of the dollar has not slowed the growth of imports. Of course, if the economy continues to slow, all bets are off. There are already reports of a slowdown in sales of super-premium wines and new interest in the under \$8-a-bottle (€5) market.

Best supermarket retailer

At one time, American supermarkets were true wine dinosaurs. They offered cheap jug wines and national brands aimed at the housewife who wouldn't

spend more than \$5 on a bottle of wine. That began changing with the wine boom of the 1980s. Now, supermarkets from coast to coast are in the thick of the fine wine trade, as well as the 'any Wednesday' kind of wines. Safeway, as one example, has wine stewards in over 140 of their stores. Outlets in wine producing areas often feature regional wines. Whole Foods Market, a national chain and specialists in organic food, easily led the field. Whole Foods has a balanced selection of mostly mid-priced wines, both domestic and imported; most, but not all, are made from organically grown grapes.

Best wine retailer, east coast

In the past, the retail trade on the east coast leaned heavily on imports. This is no longer the case. Californian wines get good play, as do other New World bottlings, especially Argentina. The winner in our survey was Sherry-Lehman, a Manhattan icon founded in 1934, with importer Bartholomew Broadbent citing the store's "superb selection and personal service". Sherry-Lehman also does extensive mail order business through its annual catalogue.

Best wine retailer, west coast

The time when west coast shops were all about local wines are long gone. This was a lively contest with several strong entries. K&L Wine & Spirits, a family-owned mini-chain, with stores in Hollywood, San Francisco and Redwood City, was the poll's choice. The selection of both domestic and imports is wide and deep at all price levels. Rob Griffin, director of imports with Wine Ware-

house, summed up K&L: "They are the smartest operators and have a wonderful staff." Tightly bunched in the runner-up spots were Beverages & More!, a chain operating chiefly in the west, Hi Times, a much respected southern California shop, and The Jug Shop, a San Francisco store noted for their Australian selection.

Best importer

There were a few surprises in this category. First, it didn't split along east-west lines as had been expected and, second, the winning vote went to a specialist California importer. There could be an important message there in both cases: as far as imports go, the US is a more singular market than thought and it doesn't work all that well to try to cover the globe: it is a time of niche markets in wine.

Kermit Lynch Wine Merchants carried the vote. This small Californian firm almost exclusively imports Burgundies, Rhônes and southern French wines, with a handful of Alsatian and Bordeaux and a token showing of Italian. Lynch has a devoted, almost cultish following with national appeal. His monthly newsletters are read from cover-to-cover – and his rants against 'Parker-Spectator' and the 100-point rating system are legendary. His wines are especially popular in restaurants.

Best Internet retailer

After a number of false starts in the 1990s, the Internet is becoming an important factor in wine sales. As restrictions on direct-to-consumer shipments are lifted, it will become even

BEST WINE BUYER*Bill Hayes of Beverages & More!*

Willing to take risks, he challenges his customers, has a well-balanced selection from around the world and is especially strong on good value wines.

**BEST SOMMELIER***Rob Bigelow MS from Bellagio*

Leading a staff of 18 sommeliers, he offers 5,250 wines at six different restaurants, including 250 by the glass, and is credited with giving priority to matching food and wine.



more so. Established in 1998, wine.com was the hands-down winner from a fairly wide field. Reasons cited included its wide selection and focus, such as the line of under-\$20 90-point-plus wines.

Best wholesaler

Many in the wine business see wholesalers as a major problem in getting wine to the consumers. A few large wholesalers dominate and they tend to pay more attention to large producers, regardless of quality. Not many wanted to name a 'best' wholesaler, but the west coast Henry Wine Group garnered the most votes for having the 'best educated' staff. It was especially interesting that not one vote was cast for Southern Wine & Spirits of America, far and away the largest US wholesaler. It controls in excess of 20% of the wine and spirits market by dollar.

Best wine buyer

The voting was widely scattered and there were surprisingly few votes for the mammoth national chain buyers. Although Annette Alvarez of Costco was mentioned, as was Mary Melton of PF Chang's restaurant chain, the winner was Bill Hayes, the senior wine buyer for 75-store-plus chain Beverages & More!. Willing to take some risks, he challenges BevMo customers and is especially strong on good value wines. He also gives individual store buyers the opportunity to showcase regional sets.

Best restaurant wine list

There was no clear favorite in this category and it's easy to see why. There are an astonishing number of good wine lists across the country as an explosion of young wine buyers and sommeliers

create adventuresome new lists. Top accolades went to Gary Danko in San Francisco for its incredible depth, with virtually every wine-growing region on the planet represented. While most restaurants would be happy to have one sommelier, Gary Danko has a team of three, plus a cellar master.

Best sommelier

There are people in the US called 'sommeliers' who got the title because they are adroit at using a corkscrew. Also, in many restaurants, the wait staff plays a key role in wine choice. Having said that, there are many young sommeliers who know their wines and how to match them with food.

Rob Bigelow MS from Bellagio in Las Vegas took top honors. Bellagio is a modern phenomenon. It isn't a single restaurant, but a collection of restaurants, plus an event center and other assorted Vegas glitz. It's the kind of place that could be a joke, but works. Bigelow leads a staff of 18 sommeliers, including four master sommeliers. There are 5,250 wines offered at six different restaurants, including 250 by the glass. Bigelow is credited with keeping firm control of the list and giving priority to matching food and wine.

Best public relations firm

There were scattered votes for smaller regional agencies, but the consensus was to 'go national' to get the best wine exposure, which is why Cornerstone Communications in New York took the cake. Cornerstone specializes in wine, spirits, luxury goods and travel. They have developed "excellent access to wine media. They are big enough to provide lots of service and small enough to give personal attention," according to

Steve Burns, a marketing consultant based in California. Clients include a number of promotional campaigns, such as Wines of Alto Adige as well as small producers like Artesa of Napa and larger like Montes of Chile.

Best wine competition

The voting was split several ways on this important category. Even though some critics debunk competitions, and there are certainly competitions with unqualified judges, a gold medal means more sales. There were a few votes for competitions outside the country, but the winner was San Francisco International Wine Competition, run by respected wine journalist Anthony Dias Blue and cited for its lineup of judges.

Best wine journalist

Jancis Robinson won by a landslide, cited for her "integrity as well as her willingness to listen." Michaela Rodeno, CEO of St. Supery Winery in Napa, said, "She is knowledgeable, erudite, has a sense of humor and can be provocative."

Most influential person

Although this was probably the most predictable category, the most interesting answer came from John Gillespie, head of the Wine Marketing Council, who wrote, "The most influential person is the US wine consumer. They are increasingly sophisticated and not nearly as swayed by critics as in the past - a whole new generation of curious and independent minded wine lovers."

There were several votes for Mel Dick, senior vice president of Southern Wine & Spirits of America, but the winner was Robert Parker. Parker and Marvin Shanken dominated the voting, with Parker having a slight edge. ■