

WHO'S WHO IN GERMANY

Joel B. Payne compiled this survey from questionnaires sent to almost 500 key members of the trade. The results show that in a market as fractured as Germany, and driven by discount chains, there was little consensus in many categories.

Germany ranks fourth in the world in total wine consumption, behind France, Italy and the US. In imports, however, no other country buys more volume. With a comparatively small domestic production of, on average, 10m hectolitres, Germany has traditionally had a healthy thirst for foreign wines – and some of the key importers look back on a hundred or more years in the business.

Distributional structures and price points, however, are complicated, so knowledge about the nuts and bolts of the business is essential in order to be successful. For a generation, Germans have been known for their bargain hunting approach to wine. Today, discount chains like Aldi and Lidl control one of every two bottles sold in the country.

In 2007, Germany imported a total of almost 14m hectolitres of wine worth nearly €2bn (\$3bn). Although the average price has risen recently to a mere €1.40 per litre, this is nonetheless a subtle indication of a growing demand for somewhat better quality after years where price seemed to be the only criteria on the buyer's priority list.

The traditional wine producing countries of France, Italy and Spain lead the ranks of imported wines and account together for over three fourths of the imported volumes. Although the US is the fourth most important source, its impact is largely generated by Gallo. The rest of the New World, although growing, is still basically a footnote. In many ways, Germany resembles more the UK or other importing markets like Holland, Sweden or Japan than those countries with a large domestic production. Still, there is one significant difference: the German market is completely liberalised. There are no taxes or duties levied on wine, imports are – beyond the

regulations of the European common market – in no way restricted. There is no three tier system or limitations on alcohol sale, advertising or consumption.

Best supermarket retailer

In a country where discounters control slightly over half of all wine sales, classical supermarkets are having problems finding their proper footing between lower price points at one end and the fine wines on offer on high street on the other. Not surprisingly, many Germans see the discounters as supermarkets and often voted for Aldi Süd. In the end, though, it was Famila and Edeka that garnered the most votes, with the latter carrying the day in a very wide field, certainly due to its wider national distributional structure.

Best specialist retailer

Readers voted for more than 25 shops in this category, with high end specialists like KaDeWe and Wein&Glas in Berlin, K&U in Nuremberg, Gute Weine in Bremen and FUB in Cologne earning widespread praise. No one, though, could compete with Jacques Weindepot which, with its over 250 outlets nationwide, was many Germans first contact with wine. It still casts a long shadow.

Best mail order or Internet retailer

Although this category was a foregone conclusion, it was pleasing to note that specialists like Pinard de Picard in Saarwellingen, Rindchen in Hamburg and Wein&Vinos in Berlin earned kudos. Hawesko, though, the largest wine mail order company on the continent, was the elephant in the porcelain shop, appearing on nearly every ballot. It is the heart of a group – including the just mentioned Jacques

Weindepot – that turned over 52m bottles worth €334m in 2007 and has continued to grow in 2008.

Best importer

There are barely more than a half a dozen nationwide importers with any sort of international portfolio of strong brands still active in Germany today – and they all received at least a few votes: Eggers&Franke and Segnitz in Bremen, CWD in Tornesch as well as Mack&Schühle in Owen. Two companies, though, stood head and shoulders above the rest, with Schlumberger in Meckenheim outdistancing WeinWolf in Bonn by two votes.

Best wholesaler

This category has lost much of its former impact. The better wholesalers have all become small regional importers, often specialising in Spanish or Italian wines, like Garibaldi in Munich. Classical wholesalers like Hellwege in Prisdorf, Bley&Bley in Hamburg or Schmidt in Berlin still have a strong impact, but there is no longer a national network of independent wholesalers, which has forced importers to do the distribution themselves. Metro Cash & Carry does operate nationwide, and was often mentioned in a category that many voters ignored, but Wein&Glas in Berlin earned the highest marks, often by members of the trade who didn't really know whether to categorise this company as an importer, wholesaler or specialist retailer. Owner Georg Mauer admits that all three aspects are part of his business model.

Best wine buyer

Interestingly, almost no members of the trade responded to this question.

BEST SOMMELIER

*Stéphane Gass,
Restaurant Traube Tonbach, Baiersbronn*

*Born in Switzerland and raised in Alsace,
he has a "broad knowledge and
a sensitive approach to his guests".*

**BEST WINE JOURNALIST**

Jens Priewe, Munich

*Among wine writers, he has the best
command of the German language.
"Not only does he write extremely well,
he also has something to say."*



None of the wine buyers in Germany have the recognition of a Dan Jago at Tesco or Annette Alvarez at CostCo, but tend instead to operate behind closed doors. Several voters commented that there is no one today who has the profile that Ludwig Wengenmayr enjoyed in his heyday at Rewe. In spite of their enormous impact on the market, no one knows or talks much about the buyers at Aldi, Lidl or Tengelmann. The result? No award.

Best restaurant wine list

There are more highly rated restaurants in Germany than in any other European country, with the exception of France. Many of them also have an excellent wine lists. Not surprisingly, votes were cast for over fifty establishments, with Königshof in Munich, Lerbach in Bergisch Gladbach, Louis C. Jacob in Hamburg, Jörg Müller and Sansibar on the island of Sylt, Gut Lerchenhof in Pullheim and the Traube in Grevenbroich being mentioned more often than others. The Quadriga in Brandenburger Hof in Berlin was also praised for its decision to list only German wines.

The award, though, went in the same city to the First Floor, whose sommelier Gunnar Tietz was also often mentioned as one of the country's finest wine ambassadors.

Best sommelier

Although the German candidate, Markus del Monego, was elected the World's Best Sommelier at the world championship in 1998, he is no longer active in that capacity today. Similarly, Hendrik Thoma and Christina Fischer have also moved on to new functions, leaving the field open to a handful of

sommeliers who are not only still in service, but also well-known to a wider audience, including Paula Bosch at the Tantris in Munich, Jürgen Fendt at Bareiss in Baiersbronn, Gunnar Tietz at the First Floor in Berlin and Sebastian Georgi at Schloss Lerbach in Bergisch Gladbach.

All have their followers, and received numerous votes, but Stéphane Gass from the Traube Tobach in Baiersbronn carried the day. Born in Switzerland and raised in Alsace, he has a "broad knowledge and a sensitive approach to his guests", as one voter commented.

Best public relations firm

There are a number of agencies doing good public relations work in Germany, and most of them were mentioned at least a few times, including Integra in Hamburg, Petra Mayer in Baden Baden, Macrom in Cologne and Liebl in Munich. Although based in Vienna, Wein&Partners, an entirely female office focused on wine, placed second in the vote count, but was outpaced by Organize in Karlsruhe, run by Barbara Wanner, and who appeared on the majority of the ballots.

Best wine publication

There are three German wine publications for consumers and all received about the same number of votes: *Weinwelt**, *Vinum* and *Wein Gourmet*. Interestingly, although based in Switzerland, Rene Gabriel's *Weinwisser* also fared extremely well. However, perhaps because the questionnaire was sent to key members of the trade, the country's two trade publications received by far the most votes, with the *Weinwirtschaft** outpacing its com-

petitor *Wein&Markt* by almost two to one. Germans prefer facts to stories.

Best wine journalist

Do we really have a journalist of international stature in Germany, asked one respondent? Not surprisingly, then, there were votes for Robert Parker, Jancis Robinson and even Andrew Jefford. Kudos were split almost evenly among the better known local journalists, with Armin Diel, Dr Hermann Pilz, Stuart Pigott, Werner Engelhard, Rudolf Knoll and even the author slightly ahead of the rest. Among the younger, aspiring journalists, Stephan Reinhardt was widely praised, but Jens Priewe, who many consider has the best written command of the German language, took top honours. "Not only does he write extremely well," said one reader, "but he also has something to say."

Most influential person

Influence has many different implications. For that reason, both Robert Parker and Jancis Robinson received numerous votes, proving the English language has enormous sway here. Steffen Christmann, president of the association of Germany's elite wine estates (VDP) was also mentioned quite often. Two candidates, though, far outdistanced the rest of the pack. A strong second place went to Alexander Margaritoff, whose two companies, Hawesko and Jacques Weindpot, garnered top spots in their respective categories, but the jury's vote went to the elusive brothers Karl and Theo Albrecht. Almost no one knows them, but their discount chain Aldi sells every fourth bottle of wine sold in the country and sets the tone in value for money. ■

*Both *Weinwelt* and *Weinwirtschaft* are published by Meininger Verlag, the publisher of *Meininger's Wine Business International*.