

ASIA PACIFIC



超越時局

墨西哥龙舌兰酒在世界范围的销量稳定增长。过去几年，其销售量每年大约增长3%，到2000年，其销售量将超过500万箱大关。

在远东，墨西哥龙舌兰酒仍然只占较小的市场。可是，它的市场正在迅速增长。原因之一是，年轻一代饮用者的崛起。这些人拒绝接受苏格兰威士忌、科涅克白兰地以及那些传统名酒的概念。而喜欢喝含酒精汽水、墨西哥龙舌兰酒以及那些令人兴奋的调酒。

龙舌兰酒Sauza公司的John Rodgers说：“比起他们喝科涅克白兰地和苏格兰威士忌的兄长们来，看音乐电视(MTV)长大的这一代东方人和西方人的口味有更多的相似之处”。

龙舌兰酒的包装相当不同。它取决于广告是打墨西哥还是打美国。现在，人们越来越意识到，花哨的包装不只是为了诱使人们重复购买。

変わる若者世代

世界でのテキーラの売上は、ここ数年、約3%の割合で着実に成長しており、総額2000年までには、500万ケースの目標ラインを超える予想だ。

欧米では、テキーラ市場はまだ小規模だが、急速な成長を遂げている。「体面」を嫌い「クール」を好む若者達が、スコッチ、コニャックを拒否して、アルコポップ、テキーラを飲む傾向がテキーラ成長の一要因に挙げられる。

テキーラ・サウザのジョン・ロジャーズ氏は、「MTV世代は、少し前のコニャック、スコッチを愛飲する世代とは異なり、欧米の今の世代と共通するところが大きいのです。」と語る。

パッケージは、メキシコ・イメージかアメリカ・イメージかで大いに異なる。美しいパッケージングで消費者の購買を左右してきた時代は過ぎたとの認識が広まっている。

LOOKING LONGTERM

Tequila's steady progress in the Far East has not matched its recent dramatic growth in the West, but exporters are nonetheless contemplating the future with optimism. Chris Losh reports

While worldwide spirits sales have generally spent the last few years strolling the gentle, but inexorable path of diminishing returns and declining sales, Tequila has happily bucked the trend, strutting its way confidently upwards in the other direction.

Though starting from an admittedly low base, this cactus-based spirit has taken great delight in spiking the guns of its more prestigious competitors by increasing sales at a steady but consistent rate of around 3% a year, and by 2000 is expected comfortably to pass the psychologically important five million case barrier. It will be a signal that the drink is poised to pass from minority curio to serious player.

Moreover, this growth is unusually well-balanced. The bigger volume value brands are showing a steady growth, but the premium sector has seen enormous increases, with top-range brands such as Seagram's Patrón and Sazerac's Herradura showing growth reckoned to be around 40%, figures that any Scotch or Cognac house would kill for.

The signs all point to a product in the rudest of health: one that is attracting new drinkers, but which is increasingly allowing existing consumers to trade up to a variety of options.

This, at any rate, is the happy situation in the US, Tequila's most mature market, and one which takes around 80% of the drink, but there are signs that European markets are starting to follow suit. Asian markets, though, have long proved to be both the most entic-

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Robert Denton

ing and the most obstinate of nuts for the drinks' trade to crack.

Youth-driven

If success in the West is any guarantee of being a hit out East, then the one Tequila which should be able to make an impression on the Asia Pacific scene is Jose Cuervo, comfortably the world's biggest seller, with 2.2 million cases, nearly half the Tequila shifted throughout the world.

According to Ed Hinde, director for the brand in the region, Jose Cuervo is 'either plentiful or gaining. There's really not a lot out there besides us.'

Cuervo began to dabble in the far east about 10 years ago, but it is since signing up with IDV five years back that the market has really started to take off, leaving it the best selling Tequila by some way. Hinde is cagey about exact sales figures in the region, but he believes that Cuervo is, in terms of volume, roughly on a par with Smirnoff vodka in terms of sales.

Hinde cites one of the reasons for this impressive return as being the growth in the young drinkers' market. In the same way that the under-30s in Europe tend to reject the spirits that their parents drink

(wine in France, Scotch in the UK, for instance) so the younger generation in the Far East has moved away from traditional rice-based spirits.

Their search, though, has not taken them into the waiting (and desperate) arms of the Cognac houses, but, for the most part into the world of alcopops, where fun and fashion replace heritage, and the designer-label is king.

Tequila is, in a sense, the spirits version of the alcopop, making few claims to veneration and having a decidedly lively image. This may not be ideal for dark spirits, but it is perfect for Tequila's target drinkers.

'The young adult consumers in Asia Pacific are very open to other consumer tastes,' says Hinde. 'They identify with the drink as being American rather than Mexican. A lot of the early consumers came over to the States to study and developed a taste for the drink while they were here. They picked up on the American lifestyle and youth culture, and Tequila is a part of that.'

Increased air travel may have reduced the size of the world and encouraged cultural homogeneity, but Tequila does have an undeniable advantage over more staid drinks when it comes to the Far East in that it taps into the regional penchant for drinking in public rather than in private.

'Back in the Far East, young people tend to come to Tequila through drinking it as slammers in the bars. It's highly ritualised, and the venues are loud, fun places,' says Hinde.

Clearly, then, the rise of Tequila and the problems faced by Scotch and Cognac are not related. The

drink is carving out its own niche, not poaching disaffected consumers from the more traditional (mostly dark) Asian spirits.

'Cognac, whisky and Tequila appeal to quite different consumers,' says John Rodgers, vice president, international brand director for Tequila Sauza. 'Cognac competes directly against whisky and shochu for businessmen above 35. Conversely, Tequila is picking up new consumers emerging from the initiation stage of alcohol consumption.'

It is this feeling of being in at the birth of a new market which is exciting the Tequila barons, though every producer active in the region stresses that this is a market that is really waiting to take off rather than one which is setting pulses racing right now.

The Mexican Destileria Porfidio is unusual in citing the Far East as being one of its major export markets, yet the region still lags behind the US. In a sample of years, according to Grassl, the company is more successful in the US than in the Far East. There is, though, a natural reluctance to this than in the Far East. The natural reluctance to this than in the Far East. The natural reluctance to this than in the Far East.

'A major emphasis is placed on higher quality, estate-bottled Tequila brands or branded Tequilas in general instead of price-hyper-sensitive BOB bulk Tequila for Margaritas, which account for the major portion of exports,' he says.

Max I. Shapira, executive vice president of Heaven Hill distillers, maker of Two Fingers, agrees with this, pointing out that simply studying the sales figures doesn't tell the whole story. 'While still relatively small at this time, the category is positioned for substantial growth in the future,' he says.

Naturally, the most mature of the markets in Asia Pacific is Japan, with around quarter of a million litres of Tequila consumed a year. A small but significant mover here is the US-based Robert Denton & Co, which eschews peddling the large-selling global brands in favour of working the top-end niche market, with its El Tesoro de Don Felipe and Chinaco Tequilas.

'Our sales in Japan have increased incrementally over the last three years,' says Robert

Denton, the company's director. 'There is a growing market for high-end products such as ours.'

Though Denton concedes that the problems faced are, at this stage, larger than the actual market, he too is optimistic about the long-term future for Tequila in the region, pointing out that cultural differences may not be so great as at first appears.

'No brand can survive long term based on packaging. The major emphasis has to be on the product quality itself'

Martin Grassl

'The complex nature of "face" is always a mystery to Westerners,' he says. 'But I don't think that there is so much a "face problem" as a perception of quality problem. Tequila is almost always in a cocktail in Japan, and cocktails are a young person's drink.'

All of which means that it is not 'face' that is important, so much as hipness or coolness. As Sauza's Rodgers neatly puts it: 'This MTV generation has more in common with its western counterparts than was the case for their Cognac and Scotch drinking older brothers.'

Moving beyond being a 'drink of the moment', could, indeed, be Tequila's biggest challenge. Eastern markets are notoriously fickle, and though the drink is happily surfing the youth wave at

the moment, there is no telling whether in a year's time this wave will be approaching tidal proportions or will have crashed on the shore of discarded fashion.

The only way to safeguard against this temporariness is to build on foundations solid enough to transcend chic, and this is where the product's runaway success in Europe and the US really pays dividends.

'The ethic of buying on reputation hasn't changed much,' says Denton. 'There never seems to be much demand for products that are not great hits elsewhere. This is not the market to launch new concepts. However, in saying that, there is a demand for true premium and a willingness to try the unknown.'

The right look

When it comes to trying the unknown, packaging has historically been the key with which the Western producer has

Diverse styles of packaging



unlocked the Oriental wallet. 'Make it fancy and play the heritage card and you can charge the earth' ran the argument. But this attitude, which relied on the ignorance of both buyer and seller, is changing.

The impressive array of different bottle styles in this field depends largely on whether the exporters are trying to hitch the drink to the American or Mexican bandwagons.

Two Fingers Tequila, which sells throughout southeast Asia, is perhaps the most obvious example of what Heaven Hill's Shapira calls 'traditional non-traditionally packaged Tequila'. The bottle, unusually, is black, and though 'Producto de Mexico' is writ large on the label, the lack of Aztec clichés gives the spirit an almost stateless feel.

Set against this philosophy is Porfidio Tequila, whose 'cactus in a bottle' is about as Mexican as it is possible to get. According to Grassl, however, packaging, while it is an important consumer bait, is not a guarantee of product success in the west.

'No brand can expect to survive long-term based on packaging alone,' he says. 'The major emphasis has to be based on the product quality itself, with congruent packaging that reflects the quality of the contents.'

'The Japanese consumers, especially the younger ones, are becoming wiser,' agrees Denton. 'Discounting is the thing now. The old concept that, in the Orient, "Higher prices mean higher quality, and so we'll price it high" is becoming a dead issue.'

Tequila has not plunged headlong into the Far Eastern market with wild abandon, but there are optimistic conclusions to be drawn from its demure, cautious entry. The era of overnight rags-to-riches drinks sales in the Far East may be gone, but a growing sophistication, an increasingly aware younger generation of drinkers, and, crucially, product appreciation could herald great days ahead for those with the foresight and patience to take them.

As Denton says: 'The future is bright. We are in the market and growing; constantly growing. Where will it stop? We are nowhere near the top.'

Press To Zoom

Press To Zoom

SOUTH EAST ASIA SPIRITS MARKET VALUE 1995 AND FORECAST VALUE 2000

US\$ MILLION	1995	2000	% change
Japan	12,236.0	11,735.0	-5
Hong Kong	205.0	274.0	34
Indonesia	0.7	1.1	57
Malaysia	67.3	80.3	19
Philippines	1,020.4	1,378.1	35
Singapore	142.0	143.4	1
South Korea	478.8	482.7	1
Taiwan	99.4	115.7	16
Thailand	93.0	113.1	22
TOTAL	14,342.6	14,323.4	-

Source: Euromonitor

The Mexican Destileria Porfidio is unusual in citing the Far East as being one of its major export markets, yet the region still lags behind the US by a couple of years, according to Martin Grassl, the company's export director. There is, though, he believes more to this than just the relative immaturity of the market: the oriental penchant for quality is inevitably going to mean lower volumes.

Set against this philosophy is Porfidio Tequila, whose 'cactus in a bottle' is about as Mexican as it is possible to get. According to Grassl, however, packaging, while it is an important initial consumer bait, is no longer enough to guarantee repeat purchase of a product in the way it once did.

'No brand can expect to survive long-term based on packaging alone,' he says. 'The major emphasis has to be based on the product quality itself, with congruent packaging that reflects the quality of the contents.'