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STATE LEVEL CONFERENCE
ON
“LATEST TRENDS IN THE
HOSPITALITY AND TOURISM
INDUSTRY”

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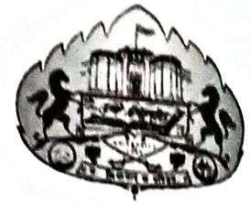


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PRESENT SCENARIO OF WINE INDUSTRY IN MAHARASHTRA

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INTRODUCTION

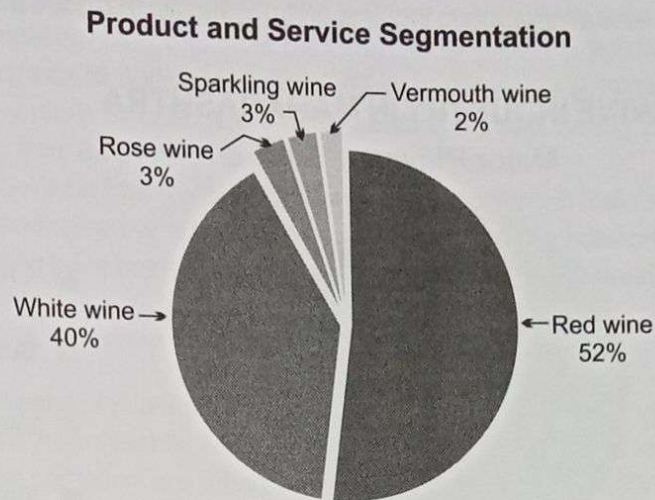
Wine has been made in India for as many as 5,000 years. It was the early European travellers to the courts of the Mughal emperors Akbar, Jehangir and Shah Jehan in the sixteenth and seventeenth centuries. British influence in the nineteenth century, vineyards were established in Kashmir and at Baramati in Maharashtra. In Maharashtra, wine grapes are grown in 3 regions, such as Pune-Narayangaon, Nashik and Sangli-Solapur areas. It is expected when all these vineyards start yielding in about 2-3 years, around 15,000 tons of wine grapes will be ready for crushing each year yielding on an average of 90 lakh litres of wine annually. There is a steep annual growth rate of about 20% in the present turnover of around Rs. 200 crores. Besides demand for imported wine is increasing day by day in India. About 38 private wineries have come up in the country 36 exist in Maharashtra and one each in Karnataka and Goa. The total investment on wineries of Maharashtra was Rs. 77.75 crores in 2004 and rose to Rs. 109.17 crores in 2005. The most popular red varieties in cultivation are Shiraz, Cabernet Sauvignon, Pinot Noir and Merlot and for Rosé still wines, Zinfandel is used. The most popular white wine grapes are Chenin Blanc, Sauvignon Blanc, Ugni Blanc, Chardonnay and Riesling.

To give impetus to the grape processing and wine industry in Maharashtra and for the benefit of farmers, the state announced a comprehensive 'Wine Policy' in 2001 and in September, 2005 it has established 'Maharashtra Grape Board' especially to develop marketing channels for grape products in our country. This Government policy aims at sustaining grape cultivation and wine industry in India in general and Maharashtra in particular. Hence, interest of table grape grower is gradually switching over to wine varieties.

WINE CONSUMPTION

Year	Domestic	Imports	Total	Growth	Units
2003-2004	425,000	74,000	499,000	-	9 Litre cases
2004-2005	515,000	100,000	615,000	23%	9 Litre cases
2005-2006	652,000	137,000	789,000	28%	9 Litre cases
2006-2007	931,000	168,000	1,099,000	39%	9 Litre cases
2007-2008	1,250,000	224,000	1,474,000	34%	9 Litre cases
2008-2009	1,300,000	175,000	1,475,000	0%	9 Litre cases

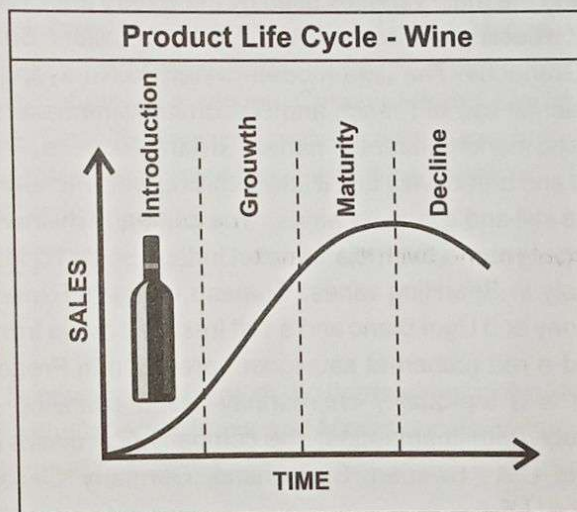
SEGMENTATION



PRODUCT AND SERVICE SEGMENTATION

Red table wine is the favourite among Indian wine consumers and accounts for an estimated 52% of all wine sales. White table wine being the second most preferred wine type, accounts for an estimated 40% of the volume sold by the industry. Sale of Rose wine, Sparkling wine and Vermouth wine together account for the remaining 8% of the wine market in India.

LIFE CYCLE OF WINE AS A PRODUCT



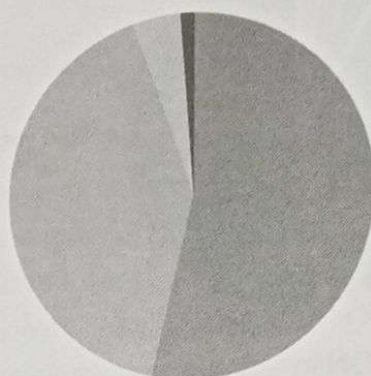
GROWTH AND PROMOTIONAL ACTIVITIES FOR WINES IN MAHARASHTRA

With the government planning to showcase "Wines of India" across the globe. The Agricultural and Processed Food Products Export Development Authority (APEDA) are working out the strategy and the campaign will be finalized soon. India has recently received its first order for wine exports to the US and Indian wines were also being served in restaurants - both Indian and Western. Approximately 0.1 million litre of wine is exporting to France, Italy, Germany, USA, New York, U.K. and Singapore from Maharashtra state. Stating that the promotion strategy would include analyzing the internal support mechanisms including easing tariff barriers for the liquor, the sources added, "The promotion campaign will target the US, the European Union, South Africa and Southeast Asia in a major way. There is more and more awareness about wine as a product in Indian market. Increase in per capita income, international research on health benefits of wines; all have

combined together to create wine awareness in India; apart from the fact that good quality wines are now available in the market.

MAJOR PLAYERS OF WINE INDUSTRY IN MAHARASHTRA

Major Players



- Chateau Indage
- Sula
- Vinsura
- Vintage

- **Chateau Indage**

Market Share 43%

Chateau Indage (CI), Narayangaon nested in the high Sahyadri Valley of western Maharashtra pioneered by Sham Chougule was established in 1984, with the technical collaboration of Champagne's Piper Heidsieck. The company owns vineyards spread over 600 acres located 230 km from Mumbai. The company kick-started the Indian wine revolution in the 1980s with a surprisingly appetizing methode traditionnelle fizz sold on the local market as Marquise- de- Pompadour but exported with considerable success as Omar Khayyam. It manufactures 18 types of wine and the main varieties used by the winery are Chardonnay, Cabernet Sauvignon, Ugni Blanc, Pinot Noir, Gamay, Riesling, Muscat of Alexandria, Semillon, Sauvignon Blanc, Chenin Blanc, Zinfandel, Shiraz, Malbec and Grenache. The ultra-modern winery in Narayangaon produces a wide range of high-quality wines under the watchful eye of French and Californian winemakers. Chateau Indage also sells a range of still wines on the domestic market under the names Riviera, Figueira, Ivy and Chantilli. The Riviera red based on Pinot Noir is well made and attractively dry; it takes chilling well. Pioneer of French-style wines in India, CI produces a variety of exquisite still and sparkling wines. The company's wineries have a capacity to produce over three million bottles of wine per year. In the Indian market Indage holds 75 % share of the premium still wine category and the virtual monopoly in Sparkling wines. Chateau Indage's Riviera label includes a fruity, well-balanced white blend of chardonnay and Ugni Blanc and a soft fresh red made from pinot noir. The Chantilly label wines; a white (chardonnay) and a red (cabernet sauvignon) are aged in French oak and show their varietal characteristics. Omar Khayyam is a top-quality chardonnay-based sparkling wine, made by the methode traditionnelle that compares favorably with champagne. The company also distills a fine oak-aged grape brandy. Their wines are also exported to U.K., Sweden, Switzerland, Germany, Canada, Bhutan, Nepal, Srilanka, Mauritius, New Zealand, Japan and U.S.A.

- **Sula Vineyards**

Market Share 33%

The most recent entrant into the Indian wine market is Sula, complete with labels of almost California sophistication. This winery was started in 1998 and setup about seven years ago near the town of Nashik, 200 km north-east of Mumbai, at an altitude of 600 metres, by Mr. Rajiv Samant, a Stanford trained software engineer and a returnee from Silicon Valley, USA. Initially, he was trying to plant Alphonso mango trees, but he found that his land near Gangapur Lake is similar to Napa valley in the USA. He, then, turned to viticulture and wine making. He built a winery with the help of Mr. Kerry Damskey, a wine maker from Sonoma county in California and planted Chenin Blanc and other wine varieties. The winery was designed by Mr. Rahul Mehrotra, Mumbai's leading

architect. The Sula winery is growing rapidly during the last few years, which actually indicates the potential of Indian wine industry. The annual turnover has increased from Rs 55 million in 2002-03 to Rs 180 million in 2004-05. The sales have increased from 20,000 cases in 2002-03 to 70,000 cases in 2004-05, out of which 4700 cases were exported. The company plans to sale over 1 million bottles abroad, during 2005-06, for which they have doubled their annual capacity from 0.75 million litres to 1.5 million litres.

Sula Brut, Sula Seco and Sauvignon Blanc will be some welcome additions to India's smarter wine list. Sula wines are available in finest hotels and restaurants in India, which includes premier hotel chains like J.W. Marriott, Grand Hyatt and Taj Hotels. Sula wines have been exported to US, UK, France, Italy, Canada and Ireland.

- **Vinsura**

Market Share 3%

Vinsura wine, from Nashik, India are a brand product of Sankalp Winery Pvt Ltd, was formed in 2003 by a group of Indian horticulturists from Nashik, Maharashtra. The winery is located inside the Vinchur Wine Park. Some of the brands from the company are Vinsura Brut, Vinsura Zinfandel and Vinsura Rose. With the recent appointment of Gopal Jadhav as the company's Chief Operating Officer, the company is growing and has a small share in the market.

- **Vintage wines**

Market Share 1%

Vintage Wines, located near Nashik, is known to produce high quality wine under the Reveilo label. Their production is reported to be small (near 100,000 cases) and they produce Reveilo Syrah, Cabernet Sauvignon, Chardonnay, and Chenin Blanc.

Factors affecting wine quality

Based on climatic conditions, vine growing areas are classified into cold, cool, warm and hot regions. However, blending of wines with different varieties, vineyards and years helps overcome vintage variation. One must use European wine varieties such as Cabernet Sauvignon, Cabernet Franc, Merlot, Shiraz, Pinot Noir, Sangiovese, Sauvignon Blanc, Chardonnay, Chenin Blanc, to make quality wine but unfortunately most of the wine manufacturers either use table grape varieties or blend with wine varieties. For varietal wines there must be minimum of 75-85% of particular variety.

IMPORTANT WINE VARIETIES

- **Red Wine Grapes**

Cabernet Sauvignon

Most of the great red wines of Bordeaux and some of the finest wines of the New World are based on Cabernet Sauvignon. It is often blended with Cabernet Franc and Merlot and its flavor is reminiscent of blackcurrants or cedarwood. It demands aging in small oak barrels, and the best wines require several years of bottle age to reach their peak.

Merlot

This variety takes second place to Cabernet Sauvignon in most premium red wine blends. Merlot is fragrant and usually softer than Cabernet Sauvignon. It also shows best with oak maturation, but usually requires less bottle maturation before it is ready to drink. Merlot bottled as a varietal is becoming popular in India.

Shiraz

This grape is also known as Syrah. It makes a soft and rich wine often characterized by smoky and chocolaty aromas. It matures faster than cabernet and is sometimes blended with it to speed accessibility.

Zinfandel

This variety probably originated in Southern Italy as the Primitivo grape. It is planted by only a few Indian wineries. The quality of wines has been very good, especially when they receive enough oak maturation.

Pinot Noir

The grape from which complex and elegant wines are made in Burgundy. There are several clones in pinot noir that show great promise. The Pinot Noir wines in are clean and lively with the flavor of ripe cherries.

Cabernet Franc

This variety possesses qualities similar to those of Cabernet Sauvignon, although they are a little less pronounced in Cabernet Franc. It is an important part of blends and is often blended with Cabernet Sauvignon.

Cinsaut (Cinsault)

Formerly known as Hermitage in the Western Cape of South Africa, it produces light wines and is most often used as a blending wine to increase accessibility at an early age. Cinsaut is one of the parents of Pinotage.

Pinotage

It is a unique South African grape made from a cross of Pinot Noir and Cinsaut. It was developed locally in 1926. It is hardy in the vineyard and generally produces a wine that is full bodied with good fruit flavors and a distinctive spiciness, but often referred to as possessing a "sweetish acetone" flavor. Previously thought to be early maturing, it is now believed that Pinotage benefits from extended maturation.

• White Wine Grapes

Chardonnay

It is currently one of the most popular if not the most popular dry white wine variety in the world. It is planted in almost every wine producing country and is one of the easiest varieties to grow. Chardonnay generally benefits from oak and is especially complex when it is barrel fermented as well as barrel aged. However, over-oaking has been a common fault of some the first Chardonnays.

Chenin Blanc

This grape is the Cape's most popular white variety with about thirty percent of her vineyards producing Chenin Blanc. It produces a wide range of wines from sweet to dry, including sparkling and still wines. Its dry wines are fresh and fruity and Chenin Blanc's sweet wines and botrytis dessert wines are becoming more fashionable.

Sauvignon Blanc

India now can produce international quality wines of Sauvignon Blanc as evidenced at few wineries located in Nashik and Pune district. These microclimates in Maharashtra are suited to the growing of this variety. The Sauvignon Blancs tend to be dry and grassy. Its plantings have increased though it is a moderate yielder

CONCLUSIONS

Presently Indian wine industry is in a nascent stage, though it has kick started only from Maharashtra much remains to be seen at the national level. The growers will have to reorient themselves for wine grapes cultivation. The wine makers in Maharashtra should learn from new world's wine makers and strictly adhere to international quality standards so that exports of wines will be their prime target. The wine makers in Maharashtra will have to go generously and in celebrating manners for wine consumptions and be able to discriminate wines with other alcoholic liqueurs. The wine in fact is a social and health drink, its consumption has to be promoted through various media campaigns and wine festivals. We hope, subsequently there exists a huge scope for expansion in area and production of wine grapes in Maharashtra.

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