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A message from the Managing Director



Shuichi HIRANO
MANAGING DIRECTOR

Dear readers,

Welcome to the latest issue of the JETRO Sydney Newsletter.

I have now been in Sydney for three months and feel that I have finally readjusted to life in Australia. That said, I'm still yet to fully explore Sydney, having spent much of my first three months travelling around the country to various trade shows, conferences and events. Some of the most enjoyable have been those JETRO has been directly involved in, like the Akita Prefecture Sake Tasting events held in Melbourne and Sydney in August.

Sake is a priority export sector for the Japanese government, and JETRO's offices around the world are collaborating with numerous prefectural governments to help their local producers gain international exposure.

I'm pleased to say the event was very successful. We had a number of interested Australian restaurateurs and business people participating, all very keen to widen the range of sake they offer to Australian consumers.

There will be more such visits in the future; another prefectural government is currently considering plans for a similar sake event in Sydney for some time in November.

We'll reveal more details about this and similar events as they become available. But until then I hope you enjoy reading our newsletter.

Have a great Spring. ☉



Not the first golden era Japan has experienced (picture: pixabay)

A Golden Era for Aus-Japan?



Tim Harcourt
Professor of Business
University of NSW

In Japan today all the talk is about 'Abe-nomics' and its 'three arrows', which are aimed at stimulating the economy. Critical to the success of this economic policy is strong economic partners like Australia. Prime Minister Abe knows this only too well, which is why his government is embracing countries like Australia

But in reality the ideas that underpin Abe-nomics are not new. In fact, we were talking about a version of Abe-nomics over 50 years ago, when Prime Minister Abe's grandfather and then Prime Minister of Japan, Nobusuke Kishi, signed the Commerce Agreement with Australia in 1957.

This agreement enabled Australia to finally embrace its geography and take commercial advantage of the industrial giant that Japan later became. Back then, with the memory of WWII still in everyone's mind, it took great courage and foresight to negotiate a deal that would take advantage of Japan's subsequent economic development.

The Agreement saw Japan play a crucial role in developing Australia's export potential and gave us the confidence to embrace the region further with the Asian Tigers, ASEAN and now the emerging giants of China and India. In many ways, it was Japan who allowed us to break free from the 'tyranny of distance' mentality to instead embrace the 'power of proximity'.

But how can Australia and Japan widen and deepen its economic relationship over the next 20, 30 or 50 years?

I would suggest there are seven key factors that can work in Australia's favour for the future strengthening of our relationship. I call these key factors "The seven Fs".

1. FREE TRADE

With the Japan Australia Economic Partnership Agreement (JAEPA) having just been concluded, numerous new avenues of trade will begin to open up, particularly in agriculture and services. Unfortunately, awareness about the agreement has been low until recently, especially compared to the talks with China. Now that the agreement has been signed, this is changing however.

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A new golden era?

In fact, according to a recent survey by DHL, prior to the agreement, only 35 per cent of exporters thought an FTA with Japan would benefit their business compared to 61 per cent who were positive about China Australia FTA. But once JAEPA came into being, 59 per cent said they would increase exports to Japan, 22 per cent of total exporters said they would now start exporting to Japan as a result of JAEPA, and 22 per cent said they would develop a new product of service specifically for the Japanese market.

2. FOREIGN DIRECT INVESTMENT

Whilst Japan is a major investor in Australia, Australian investment in Japan is still relatively low. According to research by the Australian Bureau of Statistics (ABS) only 3053 Australian businesses export to Japan (a number that has fallen by over 500 companies since the GFC) and 14 per cent of all Australian exporting small and medium enterprises (SMEs) sell to Japan. Australian companies also do not often base themselves in Japan, with fewer than 100 businesses having offices or investments in Japan (compared to over 3000 in China for instance) despite Japan only recently giving up a long-held position as Australia's number one export destination.

3. FINANCE

As pointed out by Huw McKay and Malcolm Cook in a paper for The Lowy Institute, Australia and Japan are the leaders of the region when it comes to the size and sophistication of their financial markets. China may be growing but their market is still in its early stages of development. Japan and Australia could play a key leadership role in financial issues facing the Asia Pacific region particularly as there have been frequent calls for reform of the world's major economic institutions such as the International Monetary Fund, the World Bank and the G20.

4. FREEING THE SERVICE SECTOR

Whilst Australian-Japanese trade flows are dominated by resources, there's clearly room for expansion in trade in services between the two nations. A new wave of reform under Abe-nomics has the potential to really open up this area of economy, espe-

Sporting rivalries help build international relationships and the Blue Samurai and the Socceroos are building a healthy one in the soccer. (Picture: wikipedia)



[P]rior to the agreement, only 35 per cent of [Australian] exporters thought an FTA with Japan would benefit their business ... [but] once JAEPA came into being, 59 per cent said they would increase exports to Japan."

cially given Japan's return to.

According to a local services sector expert, Professor James Kondo of Tokyo University, Australian exporters have a comparative advantage in many areas that will open up: "The healthcare, wellbeing, education and the lifestyle sectors have traditionally been closed in Japan, but this will soon change to Australia's benefit." This is important with Abenomics as well. The boost to Japan via Abe's stimulus is a shot in the arm but the long term fundamentals also need to improve.

5. FREETERS

Japan is often talked about as 'the land of the greying sun' because of its ageing demographics. Yet there is an influential younger generation with different attitudes to travel, culture and work. This is particularly evident in the labour market, where the Japanese tradition of life-time employment and salary-men working for the same company has been replaced by the 'freeter' phenomenon where casual employment and ever changing jobs and careers changes the dynamics of the Japanese employment relationship.

The freeter phenomenon has however opened up opportunities for Australian service exporters, particularly those specialising in job placement and career services. For ex-

ample, Australian Terrie Lloyd, President of Linc Media, who set up (and later sold) an on-line recruiting company called Dai-job.com, aimed his service squarely at 'freeter' job seekers.

6. FOOTBALL (SOCCER)

In Cricket we have the Ashes against England and in Rugby we have the Bledisloe Cup against New Zealand as well as a ferocious trans-Tasman rivalry in netball, but what about Japan? It could be that Football (soccer) is the answer. With Australia in the Asian Football Confederation in FIFA and the Asian clubs championships we are likely to develop a strong football rivalry. The rivalry is already well underway; who could forget the dramatic Australia-Japan match in the FIFA World Cup Finals in Germany in 2006!

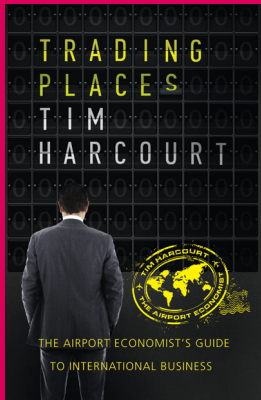
7. FEMINISATION

Japan is an ageing population, it has limited migration but it is also running out of men! As a result, Japan is becoming more female. This is occurring in the economy (more women shareholders, entrepreneurs and consumers), in politics and in society as a whole. This is changing the nature of Australia's services with Japan.

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From page 2 A new golden era?

For example in the key sector of tourism, short, intense tour bus holidays are being replaced by longer, more health conscious, reflective activities from Japan's new class of retirees. This is helping grow opportunities for health and well being, education and creative based activities instead of the just the old golf and karaoke routine of the salary-men of long ago.

Moreover, according to Tomoko Ichikawa, it's just not a matter of gender numbers either. "There's phenomenon in Japan known as "herbivores" (soshoku-kei), which applies to young men who spend lots of money on clothes, hair products and make-up and are too busy shopping to go on a date," she explains; somewhat like a Japanese equivalent of a metrosexual.

Enabling the Japanese people to reach their aspirations through Abe-nomics in 2014 is as big a challenge for Japanese Prime Minister Shinzo Abe as it was for his Grandfather in 1957. But like that agreement, the success of the JAEPA negotiations and its subsequent formalisation is an important first step in ensuring the mutual prosperity of both countries in the Asian Century.○

Tim Harcourt is the J.W.Neville Fellow in Economics at the Australian School of Business at UNSW and author of 'The Airport Economist'. This is based on the Japanese chapter of his new book 'Trading Places' to be released by New South Books in September.



Under the microscope (figuratively): analytics software like NVivo and XSight corporates and academic with valuable

Case Study: The rise and rise of QSR From Melbourne to London to Tokyo.

QSR International, a qualitative research software developer based in Melbourne, has long been one of Australia's leading ICT companies. Established in 1995 by Tom and Lyn Richards, the company quickly made a name for itself with acclaimed data qualitative analysis products such as NVivo and XSight.

These early successes led to rapid growth for the fledgling company, enabling them to expand into new markets in both the United Kingdom and the Unites States in short period of time. It wasn't long before the accolades began rolling in, and in 2009 the company won the Victorian Business of the Year Award.

It wasn't long before it became apparent there was a demand for their products in Japan, one of the world's largest yet least understood ICT markets. Long perceived as excessively complex for outsiders to penetrate, QSR initially opted for the simpler approach of building a relationship with a local distributor to bring their products to Japanese consumers.

But by 2012, with demand building and their resources expanding, the company decided it was time to explore having its own presence in Japan. This led QSR to JETRO, and a meeting was soon organised to discuss their needs.

The company explained to JETRO that it had grown to a point where it felt it would be more worthwhile having its own presence in Japan and hoped to set-up its own office in Tokyo before the end of 2013. JETRO's registered QSR for our support package, and in August 2013 JETRO's representative in Melbourne visited QSR's office to help establish an action plan with QSR Directors Kate Fleming and Joyce Chang.

Following this, the company's representatives travelled to Tokyo to engage with JETRO's special-

ists and utilise our International Business Support Centres (IBSC). Here, they quickly established what their preferred corporate model would be – opting to incorporate as a Kabushiki Kaisha – and where they would base themselves.

Things moved rapidly from there, and by November 2013, QSR had successfully opened an office in Tokyo and had already begun recruiting staff well ahead of their year-end deadline.

When asked about QSR's experience establishing its Japan operation, Kate Flemming, the Vice President and General Manager at QSR, praised JETRO for its extensive assistance program and proactive attitude.

“their new office in Japan [made] it much easier for them to both service their existing client base and build relationships with new ones.”**”**

“Going into this, I think we felt that our deadlines may have been a little ambitious, given all you hear about how complex Japan's regulatory framework is for outsiders. But it wasn't like that at all, and with JETRO's help we easily made our targets.”

She said that the decision to establish was already paying dividends, with their new office making it much easier for them to both service their existing client base and build relationships with new ones.

QSR are still relatively new to Japan, but have said they can envisage expanding further into other parts of Japan as the company's presence grows.●

Japan's evolving corporate philosophies



Minako Kawasaki
Director of
Business Development

Every country has its own business culture, which means cross cultural business always requires a level of understanding.

For instance, when a new company is formed in Australia, the typically act very quickly in setting up their various mechanisms even if their plans are still largely at the embryonic stage. Australian companies are highly adaptable, able to change direction and overcome minor problems in order to achieve results early and gain their footing.

This is quite distinct from what often happens in Japan, where companies will usually not commence any action until they have completed a detailed plan that has identified and planned for any and all risks they are likely to face. This process is slow, but enables companies to plan long-term for success.

Whilst these approaches are contrasting, Australian companies can learn from Japan's experience. Indeed, they already are.

JAPANESE IDEAS IN AUSTRALIA

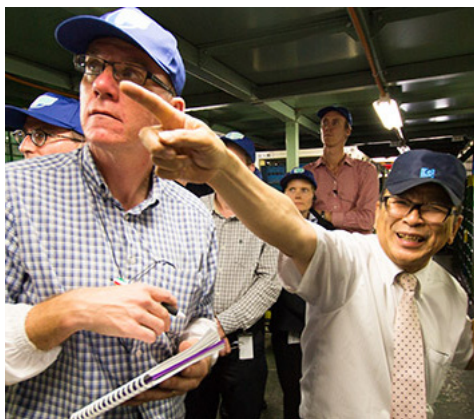
Recently, the Japanese management philosophy known as the "Lean" production method gaining increasing attention from Australian managers.

The "Lean" philosophy is simple but effective. At its core, it is about perfecting industrial processes through empowering employees to be key stakeholders and problem solvers in the company. The term "lean" is drawn from Japanese manufacturing practices, mainly from Toyota. Some vocabulary "Kanban", "Kaizen", "5S" presents basic concepts that waste minimization.

The concept's application is seemingly



[T]he Japanese management philosophy known as the "Lean" production method gaining increasing attention from Australian managers."



Japanese production techniques and the 'lean' philosophy being practiced in Japan (above) and now Australia (below).
Picture courtesy of Shinka Management



trivial in places; for instance the "5S" mantra, which stands for Seiri (sort), Seiton (set in order), Seisou (shine), Seiketsu (standardize), Shitsuke (sustain), is essentially about keeping work spaces clean orderly, and scrupulous.

Whilst simple, such practices help managers and their employees to develop a mindset that constantly strives for improved efficiency.

Another Japanese business approach has also recently been showcased in Australia. Uniqlo, Japan's largest fashion retailer and a chain whose global activities has seen it a common figure in our newsletters, opened its first store in Australia in April this year.

The company's business model is noted for enticing customers with low priced, yet highly functional products.

However, just as important is Uniqlo's approach to human resources development. The company's slogan is 'Zenin Keiei', which roughly translates as "all employees are managers".

Implicit in this notion is that each employee at every level must think beyond their official duties and constantly strive to generate additional value for customers.

This approach has been incredibly successful for Uniqlo, which has generated over 40 billion dollars across 632 stores worldwide.

Uniqlo are now applying this same philosophy in Australia, with stores already in Melbourne and one slated to open in Sydney in October.

At the start of this article, I noted how different business can be in Australia and Japan. But companies in both countries ultimately face similar challenges in our increasingly globalised market place and the exchange of methods and ideas stands to benefit both sides. ●



We Are Tomodachi

~ A Magazine to all our friends around the world ~

The Japanese Government would like to invite you to subscribe to its new Online Newsletter 'We Are Tomodachi' at: <http://japan.kantei.go.jp/letters/index.html>

The Australia-Japan FTA: use it or lose it.



Manuel Panagiotopoulos
 Australian & Japanese
 Economic Intelligence

The lack of progress in the WTO has led to the proliferation of bilateral and regional FTAs over the past 20 years, with a large percentage of them in the Asia-Pacific region.

Trade and investment policy analysts express a range of opinions about these agreements, often without direct consultation with the businesses that are expected to be the users and beneficiaries of these FTAs.

In a recently released report ("FTAs: fantastic, fine or futile?") the Economist Intelligence Unit (EIU), sponsored by HSBC, analysed the results of their survey of business executives' views about FTAs. The EIU surveyed executives across 800 companies in 8 countries, with 100 companies per country (Australia, China, Hong Kong, India, Indonesia, Malaysia, Singapore and Vietnam).

The results are startling, but contain valuable insights. For instance, it states that "[o]n average, the usage rate of the more than 50 FTAs signed by the eight countries surveyed in this study is just 26%. In other words, each FTA signed in Asia is used, on average, by only one in four exporters. Usage rates are lowest in Australia (19%) and Malaysia (16%), which is perhaps to be expected given both are major commodity exporters and there are few barriers to global



Connecting Japan's sprawling markets more fully with those in Australia will require a proactive approach from businesses on both sides of the world.



85% of respondents [reported] that their exports ... have increased either significantly (23%) or moderately (63%) as a result of the FTAs that they use."

trade in non-agricultural commodities—but they are barely higher in Singapore, where the average usage rate is 21%."

The biggest surprise is that the low rate of usage belies the second important result: "More than 85% of respondents across the Asia-Pacific region report that their exports to the markets concerned have increased ei-

ther significantly (23%) or moderately (63%) as a result of the FTAs that they use."

In Australia's case, 16% of respondents said that their exports increased significantly and 59% that their exports increased moderately when they started using the FTAs.

The discrepancy appears to be down to information: "some 44% of respondents across the region admit either to having a limited understanding of one or more FTAs their country has signed, or having never heard of one or more of the agreements."

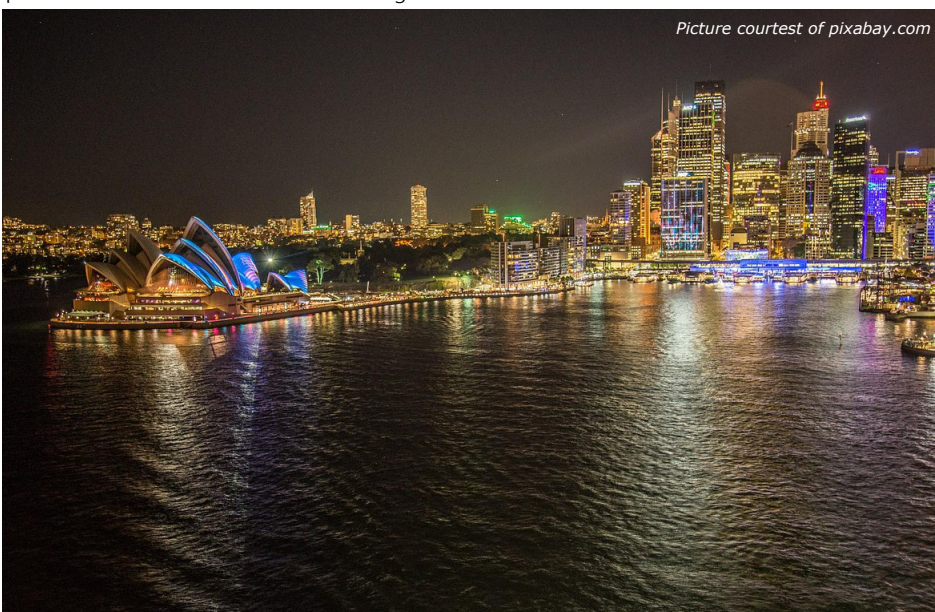
Lack of information and complexity are obstacles to the greater use of FTAs, although a great majority of companies see real benefits from using them. The companies also expressed strong preferences for comprehensive FTAs with larger economies.

The survey was carried out before the signing of the Japan-Australia Economic Partnership Agreement, which has all the attractive components of being comprehensive and being between two large developed economies.

The Australian Government has a website with useful information about the numerous sectors (from agriculture and food to manufactures, services and government procurement): <http://www.dfat.gov.au/fta/jaepa/>

Both Austrade and JETRO are key Government agencies that can assist firms in all sectors, so

I therefore urge Australian companies to invest some time in understanding the opportunities that this great new FTA will generate and make exploit the critical advantage of time over competitors from other countries. ●



Picture courtesy of pixabay.com



Picture: Muji's flagship store in Melbourne

Feature: Japan's new wave coming to Australia



Alice Byron
Research Officer

Venture out for an early Spring stroll in central Sydney or Melbourne, and you might be struck by the number of international chain stores now setting up shop on our High Streets.

Fast-fashion giants like H&M and Zara, and homeware brands such as Marimekko and Pottery Barn, have taken their first forays in the Australian retail market.

Among this crew of newcomers are two that will be familiar to anyone who's spent time in Japanese cities; the clean lines and block colours of Uniqlo and MUJI. But the presence of such retailers here is a relatively recent occurrence, something which CBRE's report, titled 'How Global is the Business of Retail?', attests to. It ranks Australia at a lowly #30 on the list of Global Retail Hotspots - well behind Japan, which ranks fourteen places higher at #16.

But why is this so? Partly it's because, for the fashion industry, the Australian market presents a particular challenge stemming from our inverse seasons, high labour costs and geographical isolation.

In spite of this (or perhaps because of it) Australian shoppers are a relatively sophisticated bunch, and have capitalised on the rise of online shopping to bring their favourite international brands to Aus-

tralia.

This hasn't gone unnoticed, with 27 of the world's largest retailers now call Australia home in response to this rising demand. However, a 2013 Colliers survey of companies actively looking for sites in Australia or in the process of setting up retail operations, only 6% were Japanese.

The addition of chains like MUJI and Uniqlo is making the market yet more varied and competitive, but other potential Japanese firms will need to act quickly in order secure part of the burgeoning retail market.

EVOLUTION OF JAPANESE FASHION RETAIL

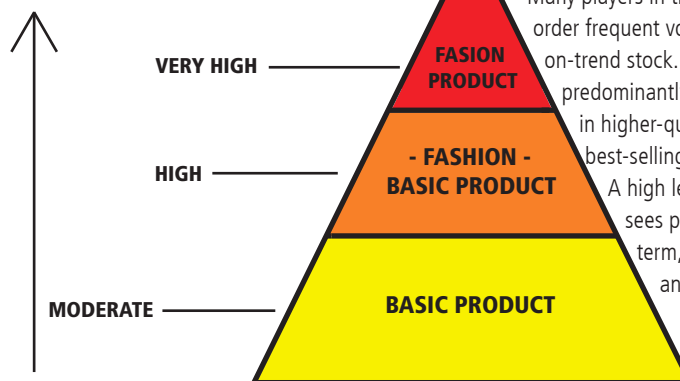
The expansion of Japanese fashion chains into Australia has been predicated on shifts in Japan as well.

According to economist Noah Springer, the gradual repeal of the Large Store Law in Japan paved the way for stores such as Uniqlo and MUJI to expand domestically. This combined with a growing post-bubble demand for lower priced goods, which allowed these companies to thrive to the point where they have had the opportunity to invest in overseas development.

After establishing a presence in Europe, the US and Asia, they have finally broken into the Australian market. Even so, there are some interesting differences between Uniqlo and MUJI and the current crop of international retailers.

Many players in the fast fashion arena tend to order frequent volumes of relatively high-risk, on-trend stock. By contrast, Uniqlo stocks predominantly basic, minimalistic apparel in higher-quality fabrics, including their best-selling Heattech and Airism ranges. A high level of vertical integration sees production controlled by long-term, specialised textile suppliers and manufacturers.

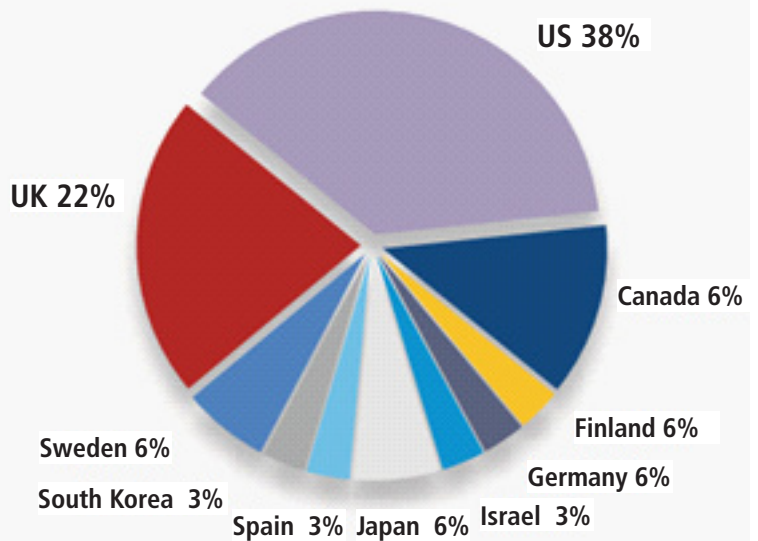
DEMAND UNCERTAINTY AT STOCK KEEPING LEVEL



Continued on page 7



INTERNATIONAL RETAILER COUNTRY OF ORIGIN



Source: Colliers International Research

This leads to much longer lead-times and a higher level of vertical integration than would be practical for other fast fashion brands.

Though for a while, this earned them a reputation among Japanese youth for being a bit off-trend, the gambit has apparently paid off: long queues of fashionistas eagerly awaited the opening of their Sydney pop-up shop.

MUJI relies on a similar strategy, combined with a koan-like policy of branding-by-not-branding. Aggressively minimalistic in its product design, MUJI began as the brainchild of Saison Group founder and public intellectual Tsutumi Seiji, based on a philosophy of low prices and waste reduction. The chain now covers an even broader range of products than Uniqlo, from skin care to furniture (although the draw for many Australians is its apparel range). Like Uniqlo, MUJI tends to avoid short-term, in its case aiming for a more classic sense of Bauhaus-esque design.

In terms of the Demand Pyramid model of supply chain management, both Uniqlo and MUJI sit towards the bottom in the low-risk basics category, pitting them against more trend-conscious competi-

tors – a strategy which may well win them new fans in the Australian market.



27 of the world's largest retailers now call Australia home in response to this rising demand ... [h]owever only 6% [are] Japanese. .”

MANAGING THE 'AUSTRALIA TAX'

There are some key barriers to the “low costs, high-quality” marketing model by which both Uniqlo and MUJI function.

Crucially, there is no way to supply these products at an equivalent price point to what could be expected in Japan, or even in their other foreign outposts. According to Yanai Tadashi of Uniqlo, even with JAEPAs in effect, without similar agreements with supplier nations the so-called “Australia Tax” leads to as much as a 30% mark-up on basic

products.

With that price tag in mind, Japanese retailers will need to adapt to Australia's highly specific market to thrive here. For instance, they may need to emphasise product range and quality, rather than the international strategy focusing on value and accessibility, in order to justify loftier prices.

Encouragingly, both chains demonstrated a degree of adaptability in this sense. This has included strategies such as incorporating larger sizes to suit different body shapes prevalent in different parts of the world, seasonal stock appropriate to the local climate. Meanwhile, MUJI has taken an active role in courting local fans via social media, now reaching 10,000 fans on their Melbourne store's Facebook page.

Finally, though they both aim to ascend past the vagaries of style, their entry to the market couldn't have come at a better time: as of the time of this writing, no-frills is totally in right now. ●



THINKING OF DOING BUSINESS IN JAPAN?

Contact the Business Development Team at JETRO Sydney about what you NEED to KNOW and where You can FIND it.

Call us on: 02 9002 6002 - Or visit our office at: L19, 39 Market St Sydney 2000

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Pictures courtesy of www.pixabay.com



Editor's Corner:

Trouble choosing a sake? Help is on the way



Daniel O'Toole
Editor

In our last newsletter I wrote a story on an Australian sake importer called Deja Vu Sake. The company was an offshoot of Deja Vu Wines, which had specialised for years in importing boutique wines.

DejaVu's co-owner is Japanese and believed Australians' taste for wine could flow into one for sake. So they seized on the vacuum in Australia for quality imported Japanese sake with their new entity. The venture that has so far been successful for them, but they admitted that filling a vacuum does have its challenges. First and foremost among these is finding a way to make sake more mainstream when there is almost no supporting infrastructure.

LEARNING THE TRADE

Unlike with wine, there is no national body analogous to 'Sommeliers Australia' for sake. This means that for any Australian to become a qualified sake expert they need to go to Japan, where their accreditation takes place in Japanese. This is a layer of cost and complexity that is beyond the scope of many people in Australia. This is reflected in the numbers: at present there are only a handful sake sommeliers in Australia.

The ramifications of this is that when you travel

to your local bottle shop, or even larger warehouse like Dan Murphy's, you'll have a hard time finding someone qualified to give you advice if you're curious about sake they have. This in turn means the range of sake in offer tends to be limited, creating a sort of negative feedback loop which limits the market's potential here.



[U]nlike with wine, there is no national body analogous to 'Sommeliers Australia' for sake... for any Australian to become a qualified sake expert they need to go to Japan."

GREATER ACCESSIBILITY

This will soon change. Given the Japanese government's aim to increase sake exports five fold by 2020, moves have been made to accreditation more accessible. To begin with Japan's 'Sake Service Institute' will soon introduce an English option.

All the same, being required to travel overseas to get qualified will remain a burden for the industry. But this too is set to change thanks to the work of Peter Gibson, a man who has become the key driver of a new push to establish a Australia's very own Sake Sommelier authority.

With a long standing association with the Japan and fluent in the language, he recently obtained his own sake sommelier accreditation from Japan's 'Sake Service Institute'. He explains that there is a program for the qualification of the 'kokusai Kikizakeshi' (international sake sommeliers).

Mr Gibson plans to unify Australia's small group of Sake Sommeliers and build a framework organisation to support the industry here. This body will provide not only for the training and accreditation of Australians interested in becoming sake sommeliers, but also offer a wide range of sakes on a contract basis for people wishing to develop their sake knowledge more empirically. According to Mr Gibson this is much closer than many think, with the first step - establishing a 'Sydney Sake School' - already well underway.

It's all extremely promising news for sake fans in Australia, but it's also long overdue. Both Britain and America have had their own sake authorities for some years, in spite of having greater distances to traverse and arguable fewer ties to work with. In both these countries the establishing a national body to educate, accredit and govern sake sommeliers was followed by a growth in the sake industry.

There is no reason to think a similar organisation wouldn't have the same effect in Australia. ●

Anyone interested in Sake Education Certification is welcome to contact Peter Gibson via email at: peterfgibson@gmail.com

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