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## PINOT NOIR TREASURES FROM THE SONOMA COAST



**WHITE BURGUNDY 2018  
BARREL-PROOF BOURBONS  
RETROSPECTIVE: VINTAGE PORT 2000**



PHOTOGRAPHS  
BY BOB STEFKO

Collector Jim Lancaster took on the challenge of moving his wines from Europe to America.

# TRANSATLANTIC FLIGHT

SHIPPING A LARGE WINE COLLECTION  
REQUIRES PLANNING, PROFESSIONAL  
ADVICE, AND PATIENCE

BY BEN  
LASMAN



It was hours past the scheduled delivery time and Jim Lancaster's shipping container was missing. In it, spread across nine pallets, was the wine collection he had spent years assembling while living in the Netherlands, where he and his family had moved in 2012.

Lancaster returned to America in 2016, but his wines stayed behind while he built a new cellar for them stateside. Now, the space in his Indiana home was finally ready for them—but standing by his storage facility on a May morning, worry and uncertainty reigned.

"We thought it was going to show up at 9 o'clock, coming out of Chicago," Lancaster recalls. "We're out there waiting, waiting. Nothing happens. We see a container go by, think it's ours, but it's going the wrong direction."

Moving a wine collection—the product of an investment of time, money and passion—is a nerve-racking process. Transit-related accidents are the second largest cause of loss for wine holdings, according to Laura Doyle, vice president and art, jewelry and valuable collections manager at Chubb, one of the few insurance companies

to offer tailored coverage for wine. Only the failure of climate-control systems in cellars accounts for more claims.

Adam Gungle, general manager of the wine-shipping firm Xpeditr, has heard his fair share of horror stories. “For a lot of clients, it’s been a roller-coaster ride through hell,” he says. “We get calls of people crying because a collection they took decades to build is ruined in a matter of four or five hours because they handed it over to the wrong people.”

Lancaster had done the legwork to ensure he was working with the right people. The designer of his home cellar, Jim Cash of Revel in East Lansing, Mich., had put him in touch with Jennifer Williams-Bulkeley, a WSET-certified wine expert and founder of the Vinolytics collecting consultancy in Boston, to facilitate the move.

But even with a reputable team in place, the stress of moving wine safely across international lines persisted. Every link in the chain—from pick-up to packing to shipment to delivery—had to come together perfectly.

Lancaster’s love of wine had developed in the Netherlands, where he was stationed as vice president of medical-device maker Biomet (now Zimmer Biomet). The company had an office in Ardèche, France, that he frequented, putting him half an hour away from the Northern Rhône Valley. Visits to area producers such as M. Chapoutier exposed him to winemaking culture.

“I grew up on a farm in Indiana, and as you meet these growers and producers you realize they’re really at their core, farmers,” he says. “So I think through that agricultural connection, I really started to understand who these individuals were.”

Two years into their stay, the Lancaster family moved to a new house near Rotterdam with a basement cellar, inspiring Jim to expand his holdings. Rhône Valley excursions led to tours of Tuscany, enriching his appreciation for Old World wines. The owner of a local wineshop nurtured his interest and helped develop his palate. Soon Lancaster was placing orders with the London-based wholesaler Farr Vintners, shipping the bottles to his brother, a U.K. resident, and picking them up whenever he went to visit.

“I did a pretty decent job of filling that little cellar over the last three years we were there,” Lancaster says. That wasn’t a problem until he had to consider how he was going to move its contents 4,000 miles across an ocean. “There was an ‘oh-no’ moment,” he laughs.

But Lancaster, an engineer by training, was quick to bootstrap a solution. Farr Vintners put him in touch with its exporter, who arranged to pick up the collection from Rotterdam and relocate it to a refrigerated warehouse in the U.K. There, his bottles were consolidated with his remaining stock at the wholesaler and held in bond for the next three years, while the family returned to Indiana and Lancaster set about building the cellar he hoped would one day house the wines he’d left behind.



The impressive wine collection Lancaster amassed during a five-year stint working in the Netherlands was shuffled, albeit carefully, from pillar to post before its arrival at its permanent home in Indiana.

**W**hile Lancaster built the cellar, his wine-moving crew got out in front of the eventual shipping plan to head-off disasters such as one described by of Xpeditr’s Gungle.

In April, Gungle, had received a call from a prospective client in the throes of one of the worst experiences that could befall a wine lover. After hiring an unnamed wine-shipping company to transport his bottles from England to Orlando, Fla., the caller, a JPMorgan Chase executive, learned that the collection had failed to clear customs and was impounded by British authorities.

“They just put it outside like a bunch of cars piled up at a junkyard, exposed to the elements,” says Gungle. “And they wouldn’t give him the wine.”

That crisis at the border came down to a few percentage points ABV. The issue was paperwork. On the document detailing the contents of the collection, the shipper had listed all bottles at 11% ABV. Without an accurate record of the percentages, U.K. customs refused to release the wine.

“Something even small like that can trigger a block,” says Gungle. After a quick review of the manifest, Gungle and his team were able to free the wines that same day, to the great relief of the executive, and bring the collection over to the U.S.

It’s a regulatory landscape Vinolytics’ Williams-Bulkeley knows inside out. An active trader on the London International Vintners

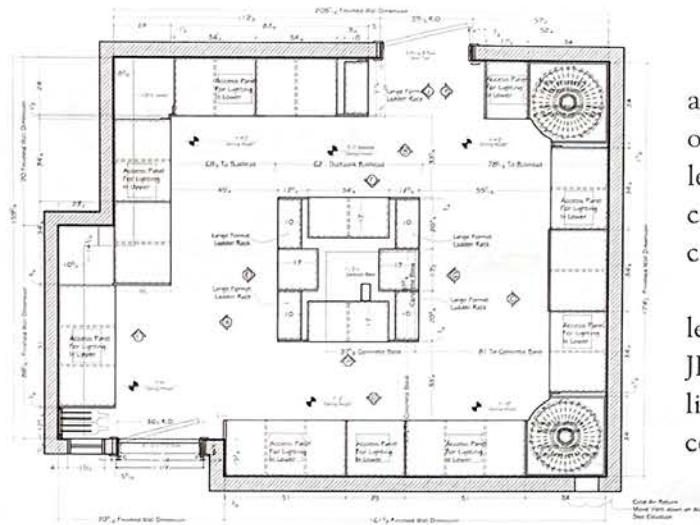
Exchange (Liv-ex), a global wine-trading platform, she buys and for clients manages their collections and arranges to ship their wine all over the world.

“You need a manifest with all the wines that are coming in itemized and attached to the declaration list,” she explains. “That includes the valuations of all the wines. If they’re an ABV over a certain percentage, you have to note it.”

Shippers must also be savvy to ever-changing FDA regulations for importing wine, from ABV to certificates of label approval from wineries, designed to control the international flow of blue-chip bottles.

The detailed accounting required to route wine globally makes a strong case for disciplined record-keeping in the cellar, a practice Williams-Bulkeley advocates strenuously.

“Wine data can be a nightmare,” she says. “I had one client who took her assistant into the cellar, read the bottles to her, and the assistant wrote them all down phonetically. So we got all the wines misspelled.”



Custom cellar designer Revel was called in to deal with architectural and space issues in Lancaster’s wines’ new home in the U.S.

Fortunately for collectors, cellar management software such as CellarTracker or Vinolytics’ own suite of tools can alleviate much of the headache when it comes to wrangling information for customs.

Tasked with helping Lancaster’s collection avoid a fate similar to that of the JPMorgan Chase executive’s wines, Williams-Bulkeley set about compiling a comprehensive dataset to guarantee smooth shipment.

“We consolidated all of Jim [Lancaster]’s wines and worked with some of our transportation partners to bring them in,” she recalls. “Theoretically it’s very complicated, but in fact the easiest part is the transportation. The gathering of the information and making sure the inventory’s right—that’s another added dimension that’s a little more labor-intensive.”

For Lancaster, Williams-Bulkeley’s expertise proved invaluable. “[She] knows how to speak the language, what to ask the exporters and how to get the best price,” he says. “It’s so much easier than with someone who just does it once.”

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## TIPS FROM A PRO

**J**ennifer Williams-Bulkeley, founder of wine consultancy Vinolytics, advises collectors on what to buy, sell, cellar and drink. With a hand in nearly every aspect of the collecting business, from building top-flight cellars from scratch to liquidating massive stashes, she’s been a guiding force behind numerous wine success stories, including Jim Lancaster’s. She’s also cleaned up a fair share of messes caused by clients’ mismanagement, negligence or just lack of education. Here she offers advice to wine lovers to up their collecting game.

➔ **TREAT WINE AS AN ASSET** not an investment: “Wine doesn’t necessarily need to be an investment, but it needs to be thought of as an asset—because it is, whether you’re drinking it for your own pleasure or you’re planning on selling it at some point. If you don’t know where a wine comes from or how it’s been stored or where it is in its drinking window, how are you going to know how that wine’s going to age and when you’re going to enjoy it over the course of its lifetime?”

“The No. 1 thing we say to our clients is: Wine goes to zero. That’s the end-game. It either gets [consumed] or it dies. So you need to get your house in order so you know, over the course of that primary, secondary, tertiary phase, exactly where you are in your collecting- and asset-management process.

“I wrestle with the concept of wine as an investment. Everybody talks about it as, quote, ‘an investment.’ But the reality is, the costs associated with it eat everything. Your storage is huge. The transportation costs, the storage costs, the acquisition costs, the tariffs ... It’s not so easy to say that wine is a good investment. Buy and hold is great and all, but there are so many things that need to go right.”

➔ **FOCUS ON OLDER WINES** “So many new collectors say, ‘I’m just going to buy the [latest vintage].’ It’s a function of the system, because there’s obviously more of the newer vintages available. But it’s incredibly important to recognize the beauty of mature wines and how the aging process takes place.

“A 3,000-bottle cellar is about eight years of drinking if you drink somewhere between 275 and 325 bottles a year. When you’re in a position to acquire that much, you should be at a point in your economic lifecycle that you can commit to shelling out somewhere between \$50 and \$150 a bottle, and building that up over time.

“I’d certainly rather a new collector start with having those library, aged, unique experiences: If you get the young bottle with the old bottle and do a side-by-side comparison, that’s when the light bulbs really start to go off. It’s important to spend the time to understand why wine is worth cellaring to begin with.”



Jennifer Williams-Bulkeley

### ➔ BUY BORDEAUX, SELL BURGUNDY

“What happened in ‘09 and ‘10 with pricing really impacted the Bordeaux market. A lot of people don’t recognize that the ‘09s and ‘10s are still in some instances down 25% and 30%.

“And Burgundy ... I traded something [recently] that was 50% over market. I don’t see how that train can keep going. But at the same time, it’s gaining in popularity. Do I think prices are sustainable? I can’t see them continuing to go up. You reach a point where you’re sitting down with collectors and they say, ‘I’ve got a \$15,000 bottle of this DRC here’—which is probably low, by the way—‘so how do I open that?’ You have to be a special kind of person to be able to do that.

“I think Bordeaux is at some point going to come back to being a relative value. The quality of the wines is outstanding, and I’d rather pay, in many instances, [\$125 to \$200] for a back vintage of Bordeaux than I would for a 2016 Napa Cab, where I’m probably going to spend \$175 to \$250.”



The wine shipping headaches and the dream cellar were worth the effort, says Lancaster. His 3,000-bottle capacity space incorporates floor-to-ceiling racking, fine cabinetry, antique glass panels and an adjacent cigar lounge.

The competing demands of capacity and stubborn architecture yielded creative solutions. Cash arranged the cabinetry around 2-foot-thick footings, structural columns and ceiling beams,

and converted a central island into floor-to-ceiling racking.

An antique window salvaged from a home Lancaster's grand father built in the 1950s was incorporated into the cellar door. A glass panel affords views of the collection from the outside, with a showpiece display of stainless-steel dowels for cradling wine studing a giant slab of wood.

All told, the temperature-controlled space could fit around 3,000 bottles, and a separate tasting room and cigar lounge built adjacent to it provided a comfortable environment to relax for a pour. It was an ideal setup, with only one missing ingredient: the wine.

In spring 2018, with the cellar nearing completion and the protocol for importing the bottles in place, Lancaster pulled the trigger, setting his collection off on its long-delayed journey to Indiana.

The day of delivery Lancaster camped outside his storage unit with bated breath. "We were out there for hours," he says. "It turned out that what we thought was the arrival time was actually their Chicago departure time." It was the one logistical hiccup in an otherwise seamlessly executed move. And what were a couple more hours after three years?

At last the container appeared. Lancaster unloaded the pallets and sorted through the wines, reuniting with his favorites, marveling at the bottles he'd forgotten.

"It was like Christmas in May," he says. □

**B**ut before Lancaster could import his wines from England, he first needed to finish the cellar in Indiana.

Soon after returning from abroad, he and his wife, Jennifer, had embarked on an ambitious renovation of their home, originally an inn built in 1905, in the village of Winona Lake. In 2017, after a year of construction, they were ready to move on to the last item on their list: a wine cellar and cigar lounge in the basement. With their contractor, they came up with a plan for converting the space.

There was a problem, though: In order to get the 8-foot ceilings needed for the cellar, the floor of the basement would need to be lowered 2 feet. When the contractor began digging, however, he hit the foundation after only 6 inches. In the end, it was necessary to build an entirely new foundation to accommodate the cellar.

Initially Lancaster had planned to fit out the space with off-the-rack shelving, but then the work of Jim Cash, of Revel, caught his eye. Revel's components—capacious pullout drawers, rotating display wheels—represented a significant upgrade from what he had anticipated, but the firm's blend of technical chops and refined aesthetic spoke to him. "I challenged myself and said, 'You're only going to do this once,'" Lancaster remembers.

In September 2017 he reached out to Cash and initiated a consultation. "[Jim] had a very complicated situation in his house," says Cash. "He also has a huge collection, so he wanted to fit as many bottles in the space as possible."