

WINE: FINDING SUCCESS IN TIMES OF CRISIS

A report for Nuffield International Farming Scholarships by:

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2020 Nuffield Scholar

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EXECUTIVE SUMMARY

As the wine world is facing an unprecedented crisis associated with diminishing demand and given the characteristics of the Chilean wine industry, novel solutions are needed to improve the current economic situation of grape growers and wine producers.

This report summarizes lessons learned after visiting several wine regions across Europe looking into their success story. The goal was to understand the key characteristics of each area, how growers built their region's reputation, the way they organized themselves to protect the quality of their wines, their marketing and production techniques, alongside ideas related to associativity, attitudes toward wine tourism and personal traits in growers, such as resilience and adaptability to market fluctuations.

The main question pivoted around how wine producers and their regions attained their current reputation in the market, and how they worked to preserve and promote it despite difficult times they faced in the past, also discussing their challenges and obstacles, past, present and future.

The main focus of the visits was wine producers, but in order to gain a better understanding and capture diverse ideas, universities and research centers, museums, restaurants, touristic attractions and regional trade associations related to wine were also visited.

Lessons gathered were divided in two main groups: regional traits that can be found in wine regions as an overall characteristic such as associativity, importance of critical mass, relationship with the press, the synergy with tourism and gastronomy, building an ecosystem beyond wine and the importance of sensible regulations. The second group were individual traits that producers exhibited, among them resilience, adaptability to market fluctuations, importance of diversifying, an inquisitive mindset and sustainability.

All these lessons can be studied and applied to a wide range of scenarios, from established wine regions to up-and-coming ones, and across a diverse range of sizes such as smaller winery start-ups and larger traditional wineries. In addition, many of them can be applied by governing bodies, growers' associations and entities related to tourism. As the wine world is in need of urgent reforms, these ideas offer useful tools to include in the process of finding creative solutions to this crisis.



Loma Blanca vineyard in Molina, Chile

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FOREWORD



My name is **Antonio Bunster Zegers**, a fifth-generation farmer based in Molina, at the foothills of the Andes mountains in central Chile.

Growing up in the capital city of Santiago, I always knew I wanted to live in and work in my family farm, where I spent most of my weekends and summers. That helped me choose my university degree, as Agronomy provided most of the skills needed for working in a farm.

Wine was always present at the family table but never as the central topic of conversation. This slowly changed during my university years when I started working in a wine shop and began to learn a little bit more about wine. Later on, I chose the Enology and Viticulture specialty courses within my Agronomy degree and embarked on a journey into a world of grapevines, yeasts, barrels, tasting and hundreds of other aspects that make wine such a fascinating beverage.

I started my professional career working inside the wine industry in different positions, both production and sales. After 5 years, I moved back to my family farm when my father decided to retire in 2017. Taking the reins from him meant learning completely new skills related to growing sweet cherries, crops and managing a herd of cattle. Once settled in the farm and with my parents support, I had the opportunity to plant my first hectare of vineyards and also started making my own wines with purchased fruit (a project called *Umbra Pluviae*). Currently at the farm, we have kept diversifying our production adding lucerne, seeds production and other agricultural ventures, therefore I get to wear many hats during the season, but my true passion remains deeply rooted in wine.

I had never heard about Nuffield up until 2019 (maybe a faint memory in my mind regarding the red tractors that my dad used to own), but once I learnt about this amazing program, and without knowing many details I decided to apply. Little did I know how it would impact my life after becoming the second Chilean scholar and International scholar number 20.

My Nuffield topic was inspired by contact with growers and friends in the dry farmed vineyards of the *Secano Interior* in Chile who were supplying the grapes for some of my wines, but also the overall situation of the Chilean wine industry which I knew as an insider, a whole sector of the economy getting stuck after decades of success. I wanted to capture good ideas abroad, being convinced that we had to change some of our ways, especially regarding associativity and wine tourism as starting points.

My Nuffield experience began in March 2020, with the Contemporary Scholars Conference (CSC) in Moreton Island, Queensland, Australia. In this idyllic tropical island, I had the first glimpse of what Nuffield was really about, meeting dozens of interesting and passionate farmers, having a wonderful time learning from inspiring speakers and familiarizing myself with the scholarship values.






At last, in 2022 we were able to resume traveling, starting our Global Focus Program (GFP) in Singapore, followed by Japan, Denmark, Israel and the United States of America. For me this was a life-changing experience, spending six weeks away from home, learning every day from a diverse range of hosts and from my fellow scholars was a unique adventure. The ‘lateral learning’ I experienced cannot be replicated in any other program, it was fantastic to see such different scenarios and production realities, such as beef and dairy farms, citrus orchards, irrigation R&D centers, rice fields, open-sea fishing, a coral nursery, urban gardening, salmon farms, a wood mill and so many others.

Finally, my personal travels started in June 2023, spending six weeks visiting European wine regions to understand the mechanics behind their continued triumph in the international markets, by talking directly with producers, university professors and governing bodies, I was able to see common factors making a wine region successful and learned many lessons that can be applied to the Chilean wine industry. I did not only focus on famous areas, but also visited up-and-coming regions where producers are starting to ride the success wave, and also included some that have suffered a long period in the doldrums. In this regard, my GFP was also beneficial in order to understand factors that also contribute to perceived quality, consumer experience and overall reputation of an agricultural product.

During my personal travels I drove 6,300 km, plus 1,400 km on a train and 1,600 on a plane. I made 47 visits, comprising 20 regions oriented towards *fine wines*¹ in 5 countries (Figure 1), including 32 wineries, 5 Nuffield Scholars, 3 universities and more than 300 wines tasted. Within the report, each time a visited region or person is mentioned, their name is written in **bold**. Unless specifically cited, all pictures used in this report were taken by me.

¹ Fine wine or premium wine is a category based on price, usually referring to wines coming from a specified region and vintage, sold in bottles and not in bulk.

Visited Regions:

-  **England:** Hampshire & Kent
-  **France:** Bordeaux, Irouléguy, Jurançon, Loire Valley
-  **Italy:** Barolo, Barbaresco & Castagnole Monferrato
-  **Portugal:** Douro, Porto & Bairrada
-  **Spain:** Empordà, Monterrei, Penedès, Priorat, Rías Baixas, Ribeira Sacra, Ribeiro, Ribera del Duero & Rioja.

A comprehensive list of all the visits can be found in [Appendix 1](#)

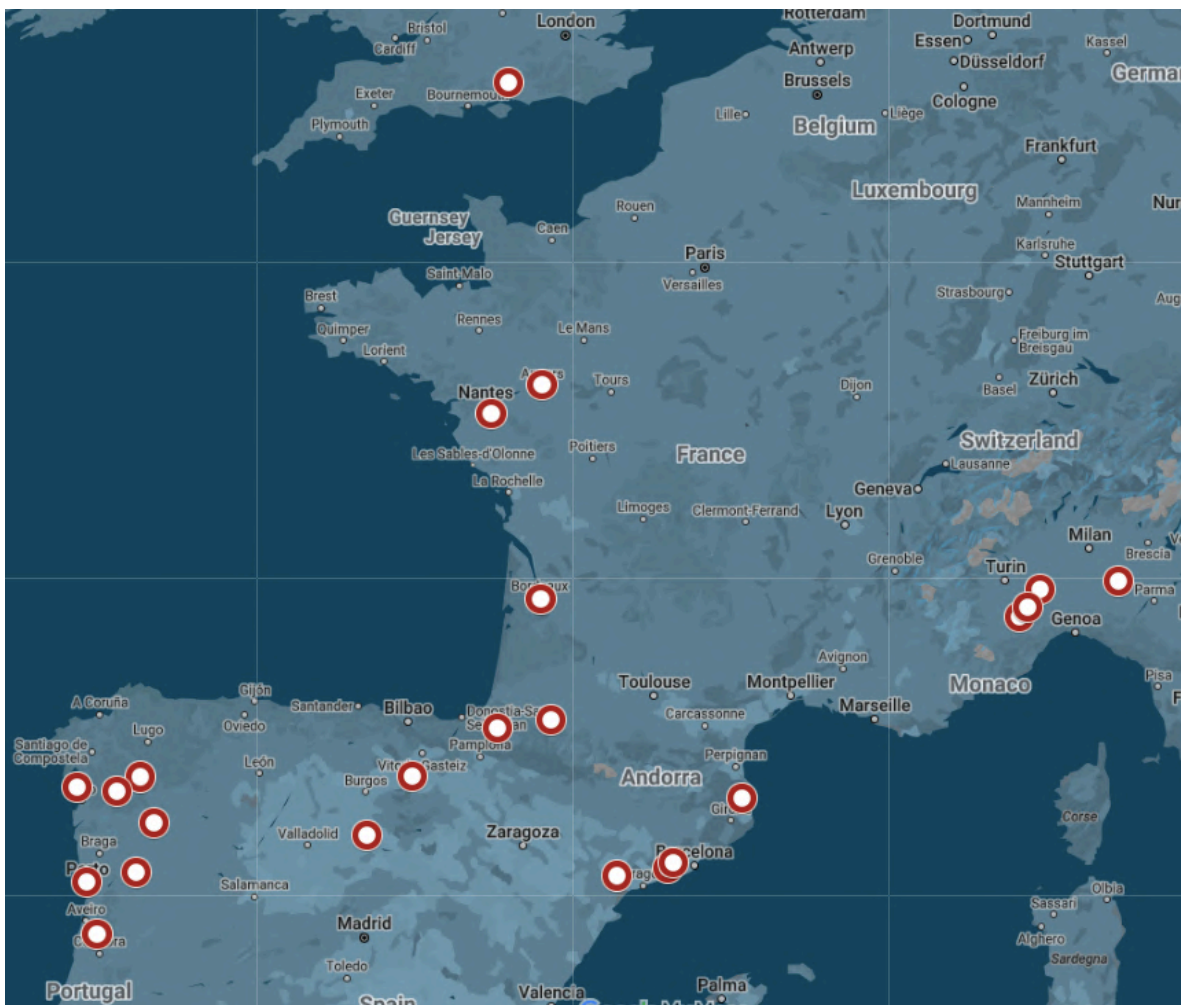


Figure 1: Map of visited wine regions.

ACKNOWLEDGMENTS

I would like to thank all the people that made this scholarship possible:

God

For the gift of life, for putting in my heart the calling of agriculture and the unique opportunity of meeting this group of fantastic people.

My sponsors

To **Nuveen Natural Capital** and **Exportaciones Meyer** for believing in me and supporting my scholarship, particularly to **Martin Davies, Nicolás Infante, Jorge & Romy Meyer**.

My parents

To **María Olga** and **Gastón** (†), who supported me all the way, manning the fort when I was away travelling.

Nuffield International directors and members

For this journey that changed my life, for guiding me in each step of the process and welcoming me into a large international family. Special thanks to **Jodie Redcliffe** for her constant support and wise counsel, **Jim Geltch** for believing in Chile, **José Manuel ‘Cote’ Irrarázaval** and **Felipe Sánchez** for all the efforts in establishing the Nuffield network in Chile.

Hosts, country executives and fellow 2020 scholars

For your generosity in each one of my visits during the GFP and personal travels, for sharing your passion and teaching me so much.

My wife

Finally, and most importantly, thank you **Bitá** for the patience, love and support, for being there for me in every step of the journey.

In memoriam...

I would like to dedicate this report to the memory of my late father **Gastón**, who kindled my love for farming and nature, teaching me all he knew about mountains, plants and animals. Alongside him I learned several important farming lessons, but most importantly I had an example of a loving father and a great husband to my mother, supporting me unconditionally when I decided to follow his steps as a farmer.

ABBREVIATIONS

- AOC:** *Appellation d'Origine Contrôlée* (European Union)
- AOP:** *Appellation d'Origine Protégée* (France)
- BSA:** Bordeaux Sciences Agro
- CIVB:** *Conseil Interprofessionnel du Vin Bordeaux*
- CSC:** Contemporary Scholars Conference
- DO / DOCa:** *Denominación de Origen / Denominación de Origen Calificada* (Spain)
- DOC / DOCG:** *Denominazione di Origine Controllata / Denominazione di Origine Controllata e Garantita* (Italy)
- DOC:** *Denominação de Origem Controlada* (Portugal)
- GFP:** Global Focus Program
- ISVV:** *Institut des Sciences de la Vigne et du Vin*
- OIV:** *Organisation internationale de la vigne et du vin* / International Organization of Vine and Wine
- PDO:** Protected Designation of Origin
- R&D:** Research and Development



Barrel Room in Château Kirwan, Margaux, France

OBJECTIVES

- Find identity elements that characterize successful wine regions and its producers.
- Identify key events, practices, people and ideas that helped cement the reputation and quality of their wines.
- Summarize recurring patterns into regional and personal traits that can be applied to a broader context such as the Chilean wine industry.
- Identify threats to the sustainability of wine businesses in different contexts.
- Recommend significant courses of action to build regional reputation and improve current situation of the Chilean and international wine industry.



Aiurri Vineyards, Rioja Alavesa, Spain

CHAPTER 1: INTRODUCTION

“Wine cheers the sad, revives the old, inspires the young, makes weariness forget his toil”

Lord Byron

1.1. Global Importance of Wine

Wine has been with humans for at least seven thousand years, linked with the dawn of civilization. Nowadays, it is produced in more than 45 countries across the world (Johnson & Robinson, 2013) and in 2023 global wine export value reached € 36 billion, the second highest ever recorded according to the International Organization of Vine and Wine, the OIV. (OIV, 2024).

Nevertheless, the wine industry is suffering a major crisis, with most wine-producing countries facing shrinking demand from consumers, slimmer margins and difficulties to stay afloat. The current situation can be explained by several short and long-term factors aggravated by the COVID-19 pandemic aftershocks. Among the most immediate reasons in the overall decline of wine consumption, are the supply chain disruptions caused by the pandemic and its associated lockdowns, war in Europe and the economic uncertainty aggravated by widespread inflation (OIV, 2024).

Quoting professor **Alfredo Coelho** from **Bordeaux Sciences Agro (BSA)** university, crises are an inseparable aspect of wine history, but this one has some unique factors making it especially difficult to overcome. Traditionally, most crises were related to overproduction in particular areas, but now the wine world is facing an unprecedented general decrease in demand. After a somewhat stable period between 2003 and 2018, global consumption started to fall and has not yet recovered (Figure 2). This situation has impacted most wine producing countries, and it is very concerning for Chile, given its high exposure to international markets.

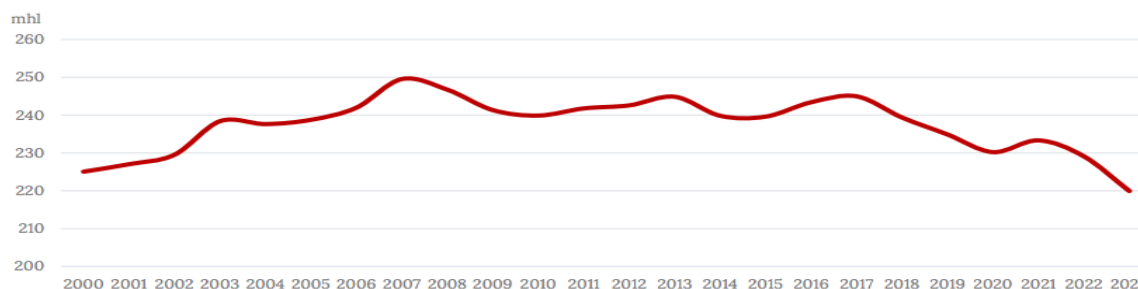


Figure 2: Evolution of global wine consumption (2000-2023) in millions of hectoliters² (mhl), including still, sparkling and special wines. (Source: OIV, 2024)

² hectoliter = 100 liters

As the dust from the COVID-19 pandemic begins to settle down and the industry hopes to get rid of the short-term factors affecting wine consumption, we are starting to glimpse some structural changes in consumption patterns, such as lower demand in younger generations (including a relevant percentage of teetotal population) (Emler, 2024), the preference for lower alcohol drinks such as beer, and a strong push against alcohol from the World Health Organization (Anderson *et al.*, 2023). Global wine industry is at the crossroads, after thirty years of constant growth we are seeing the metrics flatten out (McMillan, 2025), and no one has the silver bullet to solve this situation.

1.2. Chilean wine industry overview

Chile is the world's 8th largest wine producer and usually ranks 4th among the top largest exporters (OIV, 2024). The country has been experiencing a slowdown in exports after reaching a maximum of USD 2 billion in 2017 (ODEPA, 2025), falling in 2024 to USD 1,600 million in total value.

Wine has been an essential part of Chilean cultural identity and its agricultural economy since the arrival of Spanish conquerors who brought grapevines into Chile in 1548 (Alvarado & Hernández, 2017). Until the 1850s, Chilean wine production was based around rustic varieties of Spanish origin such as the red grape *País* (also known as *Mission* in California) and white *Muscat of Alexandria*, made using traditional winemaking techniques (foot trodden, fermented in wooden vats and stored in cow hides) and catering only to the local market.

This old and rudimentary wine industry was a very important economic activity in the non-irrigated south central valleys of Maule and Itata (together known as *Secano Interior*) (Figure 3) and it has continued with minor alterations until present times, characterized by small land owners farming ancient vineyards (Hernández & Moreno, 2011), selling their grapes for an extremely low price –given their perceived lower quality– as low as USD 0.08 per kilogram (Ñuble Actual, 2024) which makes its production economically unviable. However, these growers still add up to 15,000 hectares of centuries-old vineyards, facing severe economic hardships and without much relevance in the export markets, living ‘a local crisis within a global crisis’.

On the other hand, successful and internationally acclaimed Chilean wine regions started to be developed during the second half of the 19th century, when Chile was under a strong French cultural influence. Wealthy aristocratic families hired French winemakers to guide their nascent wineries, planting Bordeaux varieties such as Merlot and Cabernet-Sauvignon and thus the now famous regions such as Maipo and Colchagua in the Central Valley were born (Foster & Melo, 2018). Even with the ups and downs related to economic and political difficulties, wines coming from the Central Valley provided an important economic influx during the first half of the 20th century (Alvarado & Hernández, 2017).

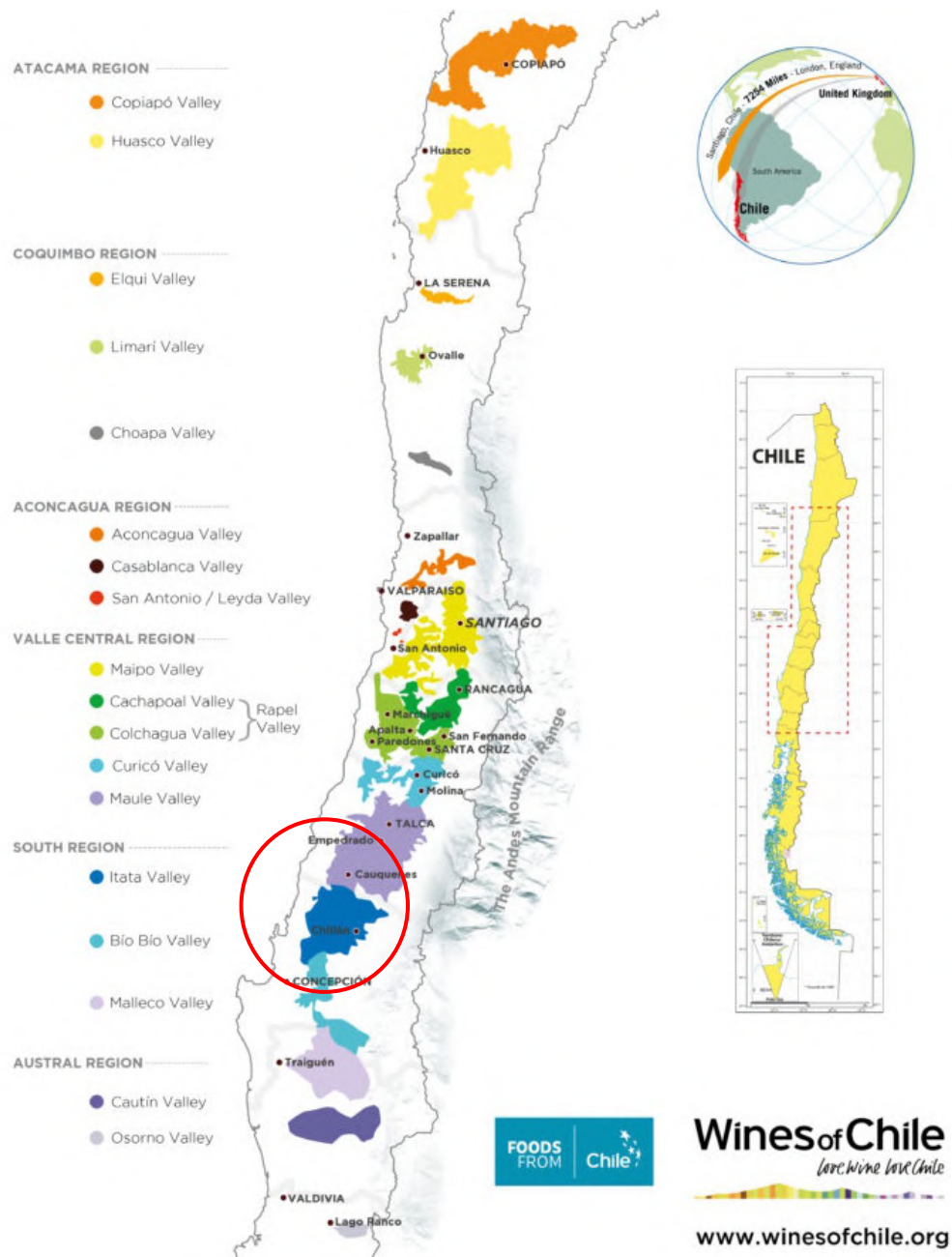


Figure 3: Main Chilean wine regions. *Secano Interior* area is marked with a red circle. (Source: Wines of Chile)

After many difficult years for the local wine industry between 1940s and early 1980s, major liberal economic reforms in the 1980s and 1990s and the signing of Free Trade Agreements with most of the largest world economies allowed Chile to experience a boom in plantings and the development of new wine-related projects in the early 2000s, these were conceived for export and catering to the needs and styles preferred in international markets, without much focus on a truly Chilean identity (Tapia, 2015).

Given the market strategy adopted at the beginning of its exporting boom, Chile has been trapped in the ‘cheap and cheerful’ category, offering reliable quality at a low price, and for the past 20 years it has been very difficult to raise the average price per liter as Figure 4 shows. Despite long-term efforts being made by high-profile wineries selling expensive bottles in the so called ‘fine wine’ market, Chile remains mostly known as a provider of reliable entry-level and mid-tier wines, with some noteworthy exceptions in the higher echelons of the premium market, where prices might be considerably higher, but volume is much smaller. This creates a stark difference with competitors such as New Zealand and France, who have much higher average prices per case of 12 bottles (Anderson, Nelgen & Pinilla, 2017) as seen in Figure 5.

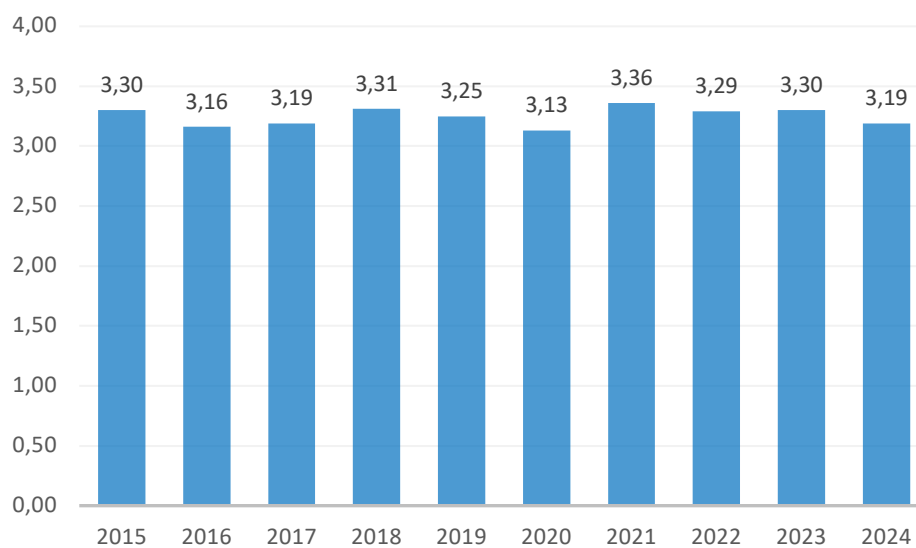


Figure 4: Average FOB price of bottled Chilean wine for export markets (USD/Liter) from 2015 to 2024. (Source: author’s own elaboration with data from ODEPA, 2025)

Some of the strengths of the Chilean wine sector have been its product consistency; excellent quality/price ratio in all price segments; high diversification of export markets; and good natural conditions for sustainable production (i.e., organic or regenerative) in a diverse range of *terroirs*³ (Wines of Chile, 2009).

³ *Terroir* is a French word that defines the specific combination of soil, climate, grapevine and human practices that create a product (wine) with defined and unique characteristics given to it by its place of origin (van Leeuwen, 2021).

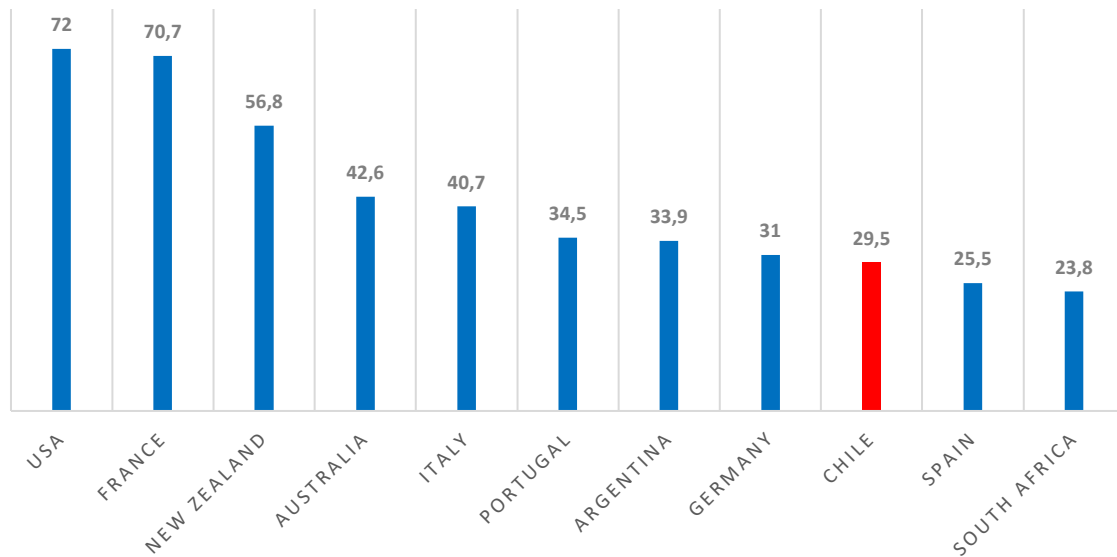


Figure 5: Average price (USD/Case of 9 Liters) for different wine producing countries in 2021. (Source: author's own elaboration with data from Wines of Chile).

Considering its weaknesses Chile lacks a clear country image in the eye of the consumer and only a few regions are known abroad, this is compounded perhaps by the fact that roughly 45% of its wine is shipped in bulk (Anderson, Nelgen & Pinilla, 2017), and that Chile dedicates one of the lowest amounts of investment in promotion compared to competing countries as indicated in Figure 6. This could also be turned into a major opportunity, as our history in the mind of the consumer has yet to be written (Wines of Chile, 2009).

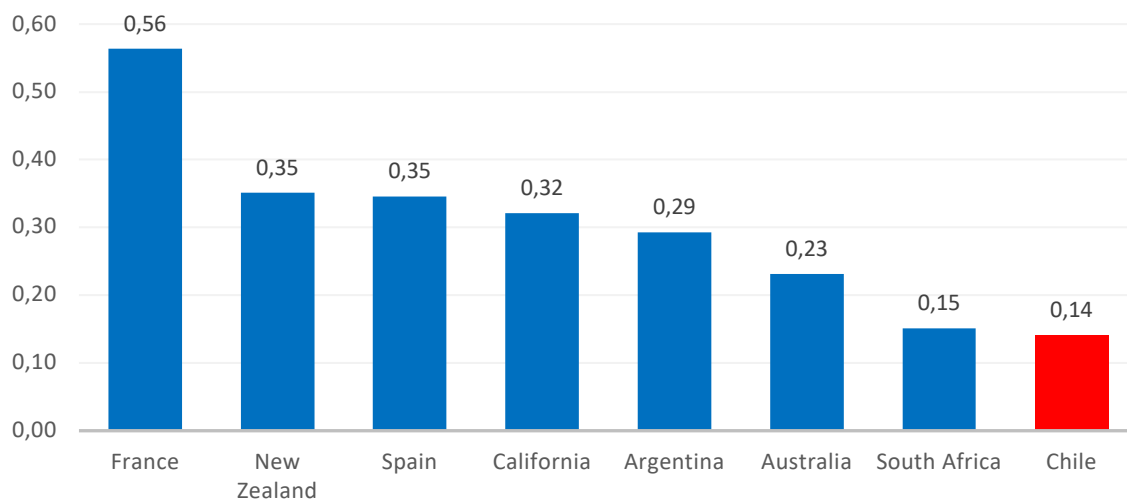


Figure 6: Estimated generic marketing investment (USD/Case of 9 Liters). (Source: Wines of Chile, 2009).

Another final aspect of the Chilean wine industry worth mentioning is its extreme concentration, where the 4 largest wineries control almost 90% of wine sales, other New World countries suffer from this issue to a lesser extent, Argentina where the 4 largest players make up for 60% of sales and U.S.A. with 56% (Anderson, Nelgen & Pinilla, 2017). In Australia 86% of sales come from 22 companies, representing only 1,1% of Australia's 2,000 wineries, showing that the benefits of the exporting boom have not been evenly distributed in many New World countries (Hall & Mitchell, 2008).

1.3. Effects of the crisis

The international scenario for Chilean wine has shifted in major ways. Particularly at the time of writing this report, the world is facing a slump in demand across all markets and many wineries are in dire straits. This affects Chile especially given its small domestic market, with 75% of its production being exported, by far the greatest proportion among wine producing countries (Anderson, Nelgen & Pinilla, 2017). Just to illustrate the severity of the situation, in 2023 Chilean wine exports fell 22% in value to USD 1,5 billion, compared to 2022 with USD 1,9 billion in value (ODEPA, 2025; OIV, 2024).

For grape growers supplying large wineries with grapes, the current situation has been impacting them negatively and worsening steadily in the last decade, facing higher production costs associated with labor and energy, water scarcity and lower prices, many of them have been forced to reconvert their land to more profitable uses such as sweet cherries, hazelnuts, specialty crops or subdivide their estate for housing developments, losing valuable farmland in the process. Within this group of grape suppliers, there is an even worse scenario for many small landowners in the *Secano Interior* who can't afford to reconvert their old vineyards given limited access to capital, no irrigation facilities, old age and lack of education. On the other hand, for wine producers and exporters big and small, the situation is not so much better, as they are seeing reduced revenue, shrinking market share and ever-increasing costs, therefore escaping from the low-price snare is paramount.

Considering this complicated scenario two alternatives emerge, one is to uproot these old vineyards, as their economic model is not viable at the time and Chile faces a surplus in planted grapevines, but it would imply losing an important part of Chilean farming culture and heritage; the other is to implement changes to adapt to new market tendencies, innovate and add value to the wine, looking to escape from the mass-produced model, aiming to capture a higher segment of the market with attractive prices. Higher price in wines should translate to better price for grape growers in the long run, as experience shows in Europe.

Despite downward trends in consumption domestically, wine remains a staple in the Chilean family table and grapes are one of the most important crops grown in the country covering nearly 125,000 hectares, but there are large disparities in terms of success of different wine regions when comparing the traditional dry-farmed vineyards in the

Secano Interior area of Chile versus the irrigated vineyards in the more famous areas of the Central Valley. As stated before, these poverty-stricken regions could be considered to be living ‘a crisis within the crisis’ and they were one of the inspirations for my Nuffield topic as part of Chile’s agricultural heritage. I also wanted to question the model under which the overall Chilean wine industry was built, a big-scale concept, without much focus on the national identity and the long-term picture.

1.4. How we define success in the wine world?

“Wine making is really quite a simple business. Only the first 200 years are difficult.”

Baroness Philippine de Rothschild

“Wine is a complex product, associated with healthy living, while in excess it can lead to death. A fashion item, experience and commodity all in one.” (Hall & Mitchell, 2008). Wine is also one of the most saturated categories of agricultural products, where consumers have to navigate among labels coming from dozens of countries, each one offering a myriad of appellations, unique grape varieties and styles, with varying levels of alcohol, sweetness, acidity, tannins, etc. Most of the traditional wine regions we know of have been famous for at least 200 years and many of them owe their prestige to their historic position in the British market (Hitner, 2015). In other words, for a wine to be chosen in a supermarket aisle, thousands of factors have to align themselves and then count on a little bit of luck. Quoting again from the book ‘Wine Marketing: A practical guide’: *“The wine supply chain is a minefield of choices each with the potential to make or break a winery”* (Hall & Mitchell, 2008).

For a wine producing region to achieve international success in one of the most competitive food/drink categories in the world is no small feat, let alone for a specific wine producer within that region. The majority of classic wine regions that benefit from wide recognition in foreign markets come from European countries, particularly from the 3 biggest players in volume and value: France, Italy and Spain. These countries proudly market their wines using their geographical origin, under a name such as Champagne, Chianti, or **Rioja** that has a protected appellation of origin (PDO in English or *Appellation d’Origine Protégée*, AOP in French) with rules regarding which varieties to grow, their yield and other very specific regulations.

Considering these successful wine regions from afar one can find some common traits such as wide recognition and availability in international markets (restaurants, wine shops and supermarkets), a critical mass of well-known wineries, a clearly defined wine style, constant presence in written press and advertising (both printed and online), being an important source of revenue for their country, etc.

For a wine producer to be considered successful is a whole different story, as success is largely dependent on the goals set by the winery ownership. But using a set of broad-brush definitions, success implies having a sound business plan with an economically viable operation (though this is not always the case when the winery is not the main source of income for the owner), being able to sell all wine made in a particular vintage within a well-defined period, having consistent good press reviews, a healthy network of importers and distributors, reasonable brand awareness from the consumers, and all the required conditions for this situation to prolong itself in the future.

My selection of regions to visit was based on this broad definition of success, looking for places with a long track record like Portugal, international recognition in specialized press such as **Ribera del Duero** and **Priorat** and prestige among consumers. Another criterion of success was looking for areas where winemaking is one of the main economic activities for the region, such as **Rioja** or **Bordeaux**. When narrowing it down to growers, the focus was on their relevance within their region, validated by their peers and wine writers alike, I also relied on the Nuffield network and personal acquaintances.

Finally, it must be noted that I targeted medium to small wine producers, as I consider their business model relevant for many small wine producers in Chile who want to develop a suitable marketing strategy. Traditionally, large Chilean companies have preferred a market-driven approach when conceiving their wine portfolio, offering the wines that markets demand, and usually without much focus on a single grape variety or wine style. On the other hand, most European producers, and especially smaller ones, prefer a product-driven approach, crafting a *terroir* wine (protected by appellation laws) and then trying to find interested buyers (Hall & Mitchell, 2008). I am aware that this might hinder their adaptability to market fluctuations, but many lessons can be learnt from this 'artisanal' approach and applied to a Chilean wine industry that has been dominated for decades by large corporations without much space for small growers.



Wine Shop at Cité du Vin Museum, Bordeaux

CHAPTER 2: REGIONAL TRAITS

~~SERRALUNGA
D'ALBA~~



Vineyards in Serralunga d'Alba, Barolo, Italy

2.1. Associativity, Collaboration and Critical Mass

“When the snows fall and the white winds blow, the lone wolf dies but the pack survives.”

Eddard ‘Ned’ Stark, in R.R. Martin’s *A Song of Ice and Fire: Game of Thrones*

The ability for growers to cooperate is one of the main pillars for long-term success. The importance of associativity is evident in **Jurançon**, southwest France, a wine region that has experienced serious headwinds after being among the top sweet wines in France for centuries. When consumers shifted towards drier wines, Jurançon fell out of fashion and many producers started facing financial struggles. **Irène Ghilhendou** from **Domaine Latapy** explained how a group of 65 small producers decided to get together as **Les Vignerons du Jurançon**, organizing promotion as a group, a wine route for tourists and setting up a wine shop that offers daily wine tastings showcasing their wines on a rotative schedule (Figure 7). Most importantly, they challenged the conservative mindset of the local cooperative that dominated the appellation’s wine output. This has given them much better exposure to customers and owning a shared wine shop in town significantly reduces the marketing expense for each *domaine*⁴.



Figure 7: Tasting local wines at the Maison des Vins du Jurançon

⁴ *Domaine*: “French word for an estate, typically a vine-growing and wine making estate” (Robinson, 2015)

Two other initiatives worth mentioning within Jurançon were explained to me by **Jérémy Estoueigt** from **Domaine Larroudé**. First, hiring an oenologist for running laboratory analyses in a single location for all the *domaines*, and buying a mobile bottling line that travels on a truck between the cellars of the group members according to their schedule, dramatically reducing the fixed costs associated with owning an expensive in-site bottling facility.

Another form of associativity popular in beer and now nascent in wine, is collaboration between producers from different regions making a wine together. It is an interesting strategy to broaden your portfolio at a low cost but should only be tried once your core line up of wines has achieved a reasonable degree of success and if the other partner has the same level of fame as your winery. **Niepoort** in Portugal and Raúl Pérez in Spain are two producers well known for this approach ([Figure 8](#)).



Figure 8: Two examples of collaborations between wineries: on the left, Navazos-Niepoort collaboration wine from Southern Spain. On the right, Jaboulet-Penfolds new release called ‘Grange La Chapelle’ made using Syrah from Hermitage in France and Shiraz from South Australia. (Source: winery’s websites).

Besides cooperation, achieving critical mass is fundamental for regional success, it is very difficult, if not impossible, for a grower to succeed alone in an international market. This was a common topic of conversation during my visits in Spain, for example in **Monterrei**, **Rías Baixas** and **Ribeira Sacra**, three different appellations within Galicia. Many growers explained that one of the key aspects for gaining recognition abroad was having a sufficient number of producers in the market under a similar style and positive press coverage. It was evident from their perspective that a ‘lone ranger’ model does not work, as regions often need many years or even decades before being recognized, therefore the one-odd producer making something remarkable is not sufficient, you need a group of people pushing in the same direction and sharing a common vision, and this point directly relates to associativity.

2.2. Relationship with the Press

“Wine writing as an activity exists because of the wine industry and the relationship between the two is, depending on your view, symbiotic or parasitic.” - Peter Pharos

“The idea, that you can score quality is fundamentally strange... I’ve never seen it tried on works of art.” - Hugh Johnson

Although this is an extremely wine-specific subject, and perhaps not applicable for other areas of agriculture, it is nevertheless very important for the wine trade and decisive for the success of many wine regions. Wine-writing has existed for at least one hundred years, especially in the United Kingdom, and in its current state it encompasses a wide range of styles and purposes, ranging from consumer guides, to wine education and aesthetic appreciation. There are books, magazines, podcasts and websites catering to each need and level of experience. One of the most influential elements in wine writing for the past 30 years are ‘wine scores’, where a critic awards a wine a numerical score based on its quality traits, usually in a scale that reaches its maximum at 100 points (Figure 9).

Most of the producers I visited remarked how having good scores and a positive image in the wine press is fundamental to the success of a wine region. For a new winery or an unknown region, a good score can mean securing a deal with a new importer or a placement in a wine list at a trendy restaurant, meaning better brand traction. Consumers are exposed to dozens of wine countries and hundreds of appellations when purchasing wine, so having read about a region before or at least seen its name appear in social media might make the difference when deciding which wine to buy.



Figure 9: An example of Bodegas Vizcarra showcasing scores obtained in the 'Guía Peñín' one of the most influential wine publications in Spain.

This was particularly important in the history of **Priorat**, Spain, where **Marc Pérez** from **Cims de Porrera** told me how this was a relatively unknown region until the influential American critic Robert Parker Jr. gave it some top-ranking scores in the 1990s, which catapulted Priorat to its current fame among the top wines in Spain, helping cement its reputation and making growers believe in the potential of their land (Figure 10). Once a region has established its reputation it should try to maintain a healthy relationship with major wine critics in order to keep its relevance and brand awareness in key markets. Producers should take care not to be over influenced by wine critics or cater to their particular taste in what might become a parasitic relationship.

Such is the case of **Bordeaux**, a region once accused of suffering a 'Parkerization' in the late 1990s and early 2000s, where wines with ripe aromas, higher alcohol and oaky notes were favored by Parker, causing many growers to adopt that style in search of higher scores, sometimes deviating from the classic style of the region. **Ángel Urbina** from **Rioja** advises growers to choose *ad hoc* writers influential for their particular export markets and develop a relationship, while staying true to their own winemaking style, as you cannot please every critic.



Figure 10: Discussing the historic importance of wine scores in **Priorat** with **Marc Pérez**. Pictured is one of the iconic wines from the revitalized local cooperative '**Cims de Porrera**' and its old *vino rancio* barrels.

2.3. International Recognition and Brand Awareness

“You can’t buy what you can’t remember”

Never Know Defeat, Branding Agency

Besides a few notable exceptions, small or obscure wine regions and their local grape varieties tend to be forgotten by the non-specialized consumer, therefore focusing on building the reputation of broader areas or the country as a whole might be a sensible approach for an emerging wine region. Considering the case of Chile, it must be considered that many consumers have a hard time finding the country on a map, and struggle to remember a wine region that they have not visited or cannot pronounce. A pyramidal structure for promotion where broader areas or names get more publicity is a good start, and once the country is known for the quality of the wine, smaller areas can be introduced to the consumers. This is evident when one compares **Rioja**, which is a large and well-known area, with smaller Spanish appellations such as **Monterrei** or Bierzo, regions that face difficulties with brand retention and need the help of the specialized press in getting the message across.

At the same time, it is usual for countries to be known internationally just for one or two main grapes, and only after they have reached sufficient market penetration with broader categories some ‘rarities’ might start to get traction from discerning consumers. When considering which grapes to grow in a new region, the advice from **Bixente Oçafrain**, a winegrower that blends lesser-known Basque varieties such as Tannat with Cabernet-Sauvignon in the French region of **Irouléguay**, is worth considering: *“when you make wine in an unknown region, you should use some well-known varieties.”*

2.4. Group Marketing

“Coming together is a beginning. Keeping together is progress. Working together is success”

Henry Ford

In **Porto**, where Port fortified wine was born, I had the pleasure of meeting **Cristiano van Zeller**, a founder member of the **Douro Boys** (Figure 11). This is an association of 5 friends, producing world-class Port and Douro dry reds, who got together in 2003 to promote Douro wines internationally. Marketing activities such as seminars, tastings and wine dinners are done together, while each member decides its own market strategy and importers. Between them, the group now produces around four million bottles of Douro wine, distributed in more than 100 countries (Ahmed, 2023). This association has helped them gain fame among consumers offering a vibrant and fun way of selling their

wines. Cristiano points out that this has been a cost-effective strategy to ‘make noise’ in the markets, and that one of the keys to their success has been sharing the same code of strict ethics, for example aiming for the highest possible quality and not poaching each other’s importers (Rand, 2020). The transition to the next generation is secure, now that their daughters and sons are traveling together as the ‘Douro Kids’.



Figure 11: Left: The five Douro Boys. Dirk Niepoort, Cristiano van Zeller, Tomas Roquette, João Ferreira Álvares Ribeiro & Francisco Olazábal. Right: their Anniversary Very Old Tawny Port, a limited edition of 950 bottles that was sold for 800 Euro a piece (Photograph on the left by Jorge Simão, on the right by Douro Boys)

A similar case happened in **Barolo**, Italy, where another association helped change market perceptions in the 1980s, called by the press **Barolo Boys**, it included **Chiara Boschis**, a notable producer that I visited, who jokingly refers to the group as ‘Barolo Boys and one girl’ (Figure 12). This association, composed by young, quality-conscious and ‘rebel’ winemakers that broke with tradition, traveled around the world showing their wines in a time when Barolo was hardly fashionable, offering a modern style of wine that was very successful in the American market, including a movie in their marketing efforts. Nowadays the members, no longer boys, are highly respected growers, with their wines ranking among the best in Barolo. Thanks in part to their constant work, Barolo changed its position from being an obscure historic curiosity to an appellation highly coveted by wine lovers.



Figure 12: Left: Meeting **Chiara Boschis** in her cellar. Right: The Barolo ‘girl’ & the group back in the day on a promotion trip.

(Photograph on the right by baroloboysthemovie.com)

2.5. Leveraging Fame

“It helps to have friends in high places”

Anonymous

Ribera del Duero is considered by some as *“the modern red wine miracle from Spain”* (Johnson & Robinson, 2013) and one of the few able to rival **Rioja**. When this region was granted a protected appellation status in 1982 as *Denominación de Origen (D.O.)* it did not have many famous names within its boundaries and was relatively unknown compared to **Rioja**. But growers were quick to invite one of Spain’s most famous names, Vega Sicilia (established in 1864), to be part of the appellation, even though their vineyards were just outside the drafted boundaries (which they promptly modified to include this important neighbor). They also included pioneering Alejandro Fernandez of Pesquera, which gave credence to the newborn appellation and helped them get a foot in the door when it came to marketing this new D.O. The value of pioneers, first movers and overall brave people shaking the ground is always helpful when building the reputation of a region, and it was a situation seen repeatedly in Spain, with producers such as Raúl Pérez and Telmo Rodríguez blazing a trail for others or putting a forgotten region back into the spotlight. Growers in up-and-coming regions should keep an eye out for important figures, whether winemakers or chefs, to include in their group efforts to promote their wines.

2.6. Local Cuisine

“Drinking good wine with good food in good company is one of life’s most civilized pleasures.”

Michael Broadbent

A common saying when talking about wine regions is “*people come for the wine but stay for the food*”. Food is an essential part of the cultural identity of a place, and wine is rarely meant to be drunk by itself but shared over a meal with friends and family. In this sense, each of the visited regions showcased a unique style of cooking offering high quality local ingredients that when combined with the traditional wine of the region made the experience significantly better. I got to see and taste some examples such as having a truffle *risotto* and **Barolo** wine in Piedmont, Italy or tasting *Ibérico* ham, *tapas* and **Rioja** wine in Spain, combinations so famous that they have transcended international boundaries, creating a strong association of food and place.

In the French Basque Country, I visited Nuffield Scholar **Stephanie Chanfreau** and her husband **Battitt Ybargaray** and learned how the region combines 4 different products in a food festival and an association of different *Appellation d’Origine Protégée* called ‘Les AOP du Pays Basque’ showcasing the local agriculture: the *Kintoa* ham, the *Espelette* peppers, the *Ossau-Iraty* sheep cheese and the *Irouléguay* wine (Figure 13). The goal of this association of different AOPs is to improve their visibility, engage in collective marketing activities and promote ethically sourced, *terroir*-driven products. In summary, being able to offer a specific set of traditional dishes or agricultural products that go along its wine, can boost a wine region’s fame and interest among tourists, food and wine lovers.

2.7. Culture, Beauty and Tourism

“Wine connects man and nature and time in a way nothing else does.”

Hugh Johnson

Most of the wine regions I visited boasted a rich culture based in centuries of tradition. In addition to the obvious wine-related features of each area such as picturesque vineyards and cellars, they offer a unique combination of traditional architecture, natural landscapes, history & arts that make them very interesting for all sorts of visitors. This is evident in Spain for example, where many vineyards are surrounded by medieval castles, such as the imposing **Peñafiel Castle** in **Ribera del Duero** where the local wine museum is located. Some other regions might offer ancient Romanesque churches, interesting cultural visits such as the **Angers Castle** in France, restaurants, vibrant city life such in **Porto**, etc., but the main point to emphasize is that wine alone is usually not enough to attract sufficient tourism and make visitors want to stay.

New World⁵ wine countries such as Chile, Australia or New Zealand might not have such an old history and architecture, but they can offer natural landscapes of unrivaled beauty and their unique local traditions. Each region should look to acknowledge their countryside heritage and strive to preserve and promote it accordingly.



Figure 13: The four AOP products making the Basque association and its logotype.
(Source: Les AOP du Pays Basque)

⁵ **New World** is a term used in wine writing referring to non-European countries that produce wine, such as Argentina, Australia, Canada, Chile, South Africa and United States among the main ones.

Related to the visitor's overall experience is the value of beauty. This was clear to me in Japan during my GFP, from details regarding packaging and presentation of food products, to the beautiful decoration of stores and the splendid maintenance of public gardens. In Europe, every region I visited offered something beautiful in its unique way, whether it is a natural landscape such as in **Ribeira Sacra** (Figure 14), ancient architecture and stone carvings in Galicia, or a beautifully designed modern cellar such as **Aalto** in Ribera del Duero. Beauty has an intrinsic value that helps to make the whole wine experience better.



Figure 14: Breathtaking view of terraced vineyards atop the Sil river, Ribeira Sacra, Galicia, Spain

Tourism can bring benefits to a whole region, such as in **Empordà**, northeastern Spain, where I learned how this region in the 1990s used to sell their wine in bulk, but a steady stream of affluent tourists from Barcelona drinking the local wines during their summer holidays created a stable demand when they went back to their city lives and started ordering wines from Empordà in restaurants within Barcelona. This fact combined with good reviews in the local newspapers changed the landscape for winegrowers and now they enjoy a healthy economic situation.

Successful wine regions are able to accommodate tourism in its many variations, offering a high-quality array of experiences, lodging options at different price levels, restaurants, and services that make the stay more pleasant. Examples abound such as specially designated wine routes, ability to receive cruise ships, guided tours to wineries, etc. An interesting example of the synergy between wine and tourism can be seen in **Barolo**, Italy, where a special kind of lodging emerged in the late 1990s and early 2000s called *agriturismo*, where a farmhouse is prepared to accommodate a few guests and offer a unique experience very different from a hotel, in which the guest can interact with the family that owns the place, try the local food and wine, usually at a convenient rate. This is why I decided to stay in one of Barolo's oldest *agriturismo* called ***Il Gioco dell'Oca***, its owner **Raffaella Pittatore** told me that they were one of the first in the area, and how they had seen tourism activity growing hand in hand with the popularity of Barolo wine, the increasing popularity of these establishments helped to create new job positions and a second source of income for many farmers in the area. I also spent a night in ***Cascina Meriame***, an *agriturismo* owned by local grower **Paolo Manzone** and his wife **Luisella**, where part of the experience included was a tasting of their whole wine portfolio guided by them (Figure 15).



Figure 15: Left: **Agriturismo Il Gioco dell'Oca**, Barolo's oldest. Right: finishing an amazing tasting with **Luisella and Paolo Manzone**, winery and *agriturismo* owners.

Another good example of being prepared to receive tourists can be found in the town of **Haro** in the heart of **Rioja** in Spain. Here I visited **Muga** a traditional winery with excellent tourist guides and a tour that included their cooperage, cellar and tasting, these tours are held in English or Spanish and depart every hour. Muga is located within the train station district, where five other wineries were established next to the tracks, making it an

interesting hotspot for wine lovers who can hop from one winery to the next. Haro also offers many traditional wine bars and restaurants, in summary, everything in this town speaks about wine, such as statues on the alleys, wine shops offering an excellent selection of local labels and thematic books and advertisement boards from Riojan wineries in every street (Figure 16).



Figure 16: Wine culture in the streets of Haro, Rioja, and Muga's cellar and cooperage.

Sound advice for growers interested in wine tourism can be found in the book 'Strategic Winery Tourism and Management' (Harrington & Ottenbacher, 2016): "[...], the tourism brand name should be characterized by what is distinctive in the region, the benefits and qualities of the destination, and the resulting wine-related product and services profile." [...] tourism should not just be related to haute cuisine, high-end wines and other exclusively luxury elements but especially to traditional, casual authentic culinary and wine products or services. Furthermore, more local products should be used, and the stakeholders need to develop pride in local culinary, crafts and wine products. However, this appears only possible (or a good fit) when the regional products provide high quality."

2.8. Build an Ecosystem

"Nothing is possible without men, but nothing lasts without institutions"

Jean Monnet

Bordeaux was the most striking example of how wine can shape the culture, economics and even the layout of a city. Given its high number of notable producers and Gironde being the most planted department in France, Bordeaux has built a complete ecosystem around wine, supporting its main industry through many ancillary ones with

tourism, research and education standing out. A key lesson from this visit was to see how wine needs these auxiliary institutions to secure a long-lasting success.

In Bordeaux I learned how the region has created its own unique professional association, the *Conseil Interprofessionnel du vin Bordeaux* (CIVB), some world-class research and development (R&D) institutions and universities such as *Institut des Sciences de la Vigne et du Vin* (ISVV) and *Bordeaux Sciences Agro* (BSA), museums like the *Cité du Vin* (Figure 17), specialized tourism agencies, and a particularly complex distribution system called *La Place de Bordeaux*.

Besides the world-famous producers from top estates such as Château Margaux or Château Lafite, Bordeaux is home to more than 8,000 growers in 117,000 hectares covering the whole price spectrum (Anson, 2020), aiming at different distribution channels and living under starkly different financial situations. Bordeaux's fame started well before the French Revolution and became a truly global phenomenon after the highly praised 1982 vintage. The influx of money from excellent vintages since the 1980s helped growers to invest in better cellar equipment and then vineyard development, sorely needed after the difficult post war years. On top of that a strong organization and favorable press reviews, have ensured that the region keeps a high-quality mindset and robust market presence all over the world. In order to understand these aspects better I met with different representatives of what I call the 'Bordeaux Ecosystem'.

- **CIVB:** this association represents the 3 main branches of the Bordeaux wine business: growers (*châteaux*), distributors (*négociants*) and brokers (*courtiers*). Approximately 75% of wine sold in Bordeaux is distributed within this three-tier system, where *négociants* buy directly from the *chateaux* in a business transaction mediated by the *courtiers* (Anson, 2020). This system dates back to the 18th century and some of its benefits are that each part gets a fair price on the deal; growers focus on what they do best which is making fine wine and leave the distribution aspect to the *négociants*. My visit to the CIVB was hosted by **Christophe Chateau**, Director of Communications. He explained how the association obtains its funds from a mandatory levy, the amount being defined by the annual production of the *château* or the revenue of *négociants* and *courtiers*, this allows to raise a substantial budget for marketing activities, close to 30 million Euro in 2023, a stark difference with the nearly 2 million USD marketing budget for the main Chilean association of wineries 'Wines of Chile'. This money is used to fund marketing campaigns domestically and abroad, including 280 wine educators spread throughout the world, acting as ambassadors for Bordeaux wine. On top of that it also earmarks 3 million Euro for R&D. This coincides with the observation from professor **Coelho** at BSA, on how an important marketing budget was needed for any AOP to survive.

- **ISVV:** thanks to the invitation of professor **Guilherme Martins** I was able to visit this leading research center. We toured the laboratories, experimental wine cellar and other specialized facilities, while discussing their most important challenges and lines of research

such as lower alcohol wines. The ISVV provides updated high-quality knowledge to improve vineyard and winery practices throughout France, serving both academia and industry. (Figure 18)

- **INNOVIN**: an innovation cluster for the wine industry nested within the ISVV, offering a network to build innovative projects through open calls between researchers and private companies, developing solutions for the wine industry and connecting French suppliers that want to expand internationally. They also offer bespoke seminars and technical trips for clients in countries that want to develop their wine sector.

- **INTERCO (International Cooperation Agency)**: an organism that belongs to the Aquitaine regional government, focused in boosting the agricultural sector through a technical and commercial focus. It offers support to cooperatives, growers' associations and private companies, through innovation tours for producers and technical seminars, while having a strong international outreach.

To understand every aspect of this ecosystem, I met with **Jane Anson**, an English wine writer specialized in Bordeaux that writes for several publications. She told me how an often-neglected success factor in Bordeaux relates to its universities and research centers, because their innovations benefit the whole industry improving wine quality and viticultural practices, both locally and globally. We also discussed the current trend among top *négociants* of giving too much focus to famous chateaux, while neglecting lesser-known growers that offer very good value, and how this situation puts the whole economic ecosystem at risk. (Figure 18)



Figure 17: Left, *Cité du Vin*, Bordeaux's Wine Museum. Right, Chateau Cos d'Estournel and the D-2 highway, called the “Châteaux Route”, the main road connecting the classified growths of Bordeaux.

Finally, some other success factors in Bordeaux's long history were discussed with professor **Alfredo Coelho**: the integration of wine with culture and tourism (which Bordeaux was slow to incorporate); openness to international research and cluster formation; collective spirit when tackling future innovations and finally research focused on answering societal pressures (e.g., using less pesticides), not only commercial demands (e.g., low-alcohol wine).



Figure 18: Top: Visiting Jane Anson, author of the book 'Inside Bordeaux'.
Down: Research facilities at ISVV.

2.9. Laws & Regulations

Protected appellations and their legal frames such as A.O.P. in France, D.O. in Spain and D.O.C.G. in Italy have been instrumental in safeguarding the quality and fame of agricultural products while also regulating its production, but their side effects often have been ignored by authorities and there is discontent rumbling among growers, with a couple of famous ones in each region having abandoned the appellation of origin system.

Once a region reputation is established it becomes absolutely necessary to control quality and quantity in order to maintain the perceived notion of high quality or good value and avoid diluting the regional brand. Many protected appellations dictate which varieties can be grown, maximum yield, length of barrel ageing, etc. Finding the right balance between excessive bureaucracy and tight regulation as seen in European appellations and a lax approach as seen in Chile and other New World countries is difficult but not impossible. After talking about this issue with many Spanish producers they resent excessive regulations that stifle creativity and the ability to bring to the market novelty products, but at the same time they think self-control by itself is not sufficient to guarantee good practices, therefore they see the regulatory councils for each appellation as a necessary evil that needs to be kept in check. Many appellations in Europe also have limited planting rights, which is a tool for controlling supply and indirectly prices but might keep new players outside the market. The risk of excessive growth that harms the reputation or pricing was an important concern in regions such as Ribera del Duero and Rioja.

I discussed this point with **Juan Carlos Vizcarra** in Ribera del Duero who told me how they are eschewing traditional labelling rules for ‘Reserva’ and ‘Gran Reserva’ wines within the D.O., preferring to declassify their wines to the basic level of quality in the D.O. in order to have more creative freedom regarding barrel ageing. He also mentioned how the brand value of these two categories is being diluted, at the point of risking being irrelevant for the consumer.

2.10. Everybody Wins

“There is no delight in owning anything unshared”

Seneca

One of the most important aspects of thriving regions is that everyone involved in the creation of the wine is having a fair share of its economic success. As it is often the case in any region, several hundred to thousands of grape growers supply a smaller number of wineries, therefore having a healthy growers base is paramount in the long term. This allows for incentives to be properly aligned, as good growers get a price premium for high

quality grapes (even if their yields might be lower) so they that can produce world-class wines.

This was highlighted to me in several instances in Spain, firstly in **Rioja** by **Ángel Benito**, who told me that grapes within the appellation boundaries might fetch 2,5 times the price of non-appellation fruit from the same variety. Secondly, by **Marc Perez** in **Priorat**, who explained how the local cooperatives did not pay more for quality grapes in the 1970s, and that after Priorat started to gain recognition the new wineries could afford to pay more to growers, and they got convinced that quality was the way to go. One peril of this situation is when demand for grapes is too high and external wineries such as large Spanish conglomerates can provoke price wars, outpricing local wineries who can no longer afford the grapes. In summary, having fair prices for grape growers is the only way to keep vines on the ground, a very important lesson for Chile.



Vineyard in Rioja, Spain



CHAPTER 3: INDIVIDUAL TRAITS

Roc Gramona, Sant Sadurn d'Anoia, Spain

3.1. Resilience

“Hope is not a strategy.”

Rob McMillan

There are no quick fixes when building a successful wine label. While in Galicia I got to spend a full day in company of the amazing **José Luis Mateo** at his **Quinta da Muradella**, one of the standard bearers of the **Monterrei** appellation (Figure 19). Our conversation covered the psychological and human factors involved in his story. Several important lessons were gained, first of all, he says that a new wine grower should believe in his/her potential (and of the region) even when nobody else does, putting passion into work, but being very aware that passion alone is no guarantee of success, and that being open to constructive criticism was fundamental.

Secondly, he recommended to have a long-term vision, securing the financial and physical strength needed to carry such a project and survive during the founding years, as you start showing results and convincing others of your potential. Third, to leverage on existing subsidies and/or structures such as trade missions to build your clientele, always aligning subsidies with quality over quantity, and avoiding excessive debt. Fourth, to learn to cohabit with growing pains or ‘necessary evils’ such as supermarket wines as cash cows for your business, planting in lesser sites when you cannot afford the best vineyard locations, using herbicides even if you would prefer not to, etc.



Figure 19: Getting a lesson in Galician varieties from **Jose Luis Mateo**. Note the use of granite post for the trellis, a typical feature of vineyards in Galicia.

3.2. Diversity

“Don’t put all your eggs in one basket”

English Proverb

In **Douro**, Portugal, I discussed the importance of having a diversified portfolio in order to cope with market fluctuations with the export team at **Niepoort**, this was evident seeing how traditional Port producers also started making dry red wines in the late 1980s and early 1990s, providing dynamism to the region and broadening the consumer spectrum. Niepoort now has an almost dizzying number of labels (Figure 20), though they only offer a selected few to a new importer. Their philosophy is to be willing to risk and make mistakes in order to create new styles, betting on a very different and colorful design in their labels and to ‘have a portfolio that complements itself’, including sparkling wines, whites & reds from many regions in Portugal and of course the fortified Porto wine.



Figure 20: Just a small sample of Niepoort’s overwhelming portfolio & an old advertisement on display at their Vila Nova de Gaia cellar.

When the portfolio is not very diverse in terms of labels, a diversified approach can be applied to export strategies, as one of the factors that have helped big regions such as Bordeaux and Rioja cope with crises such as the financial crisis of 2008 is having a

diversified market strategy working with many distributors and importers globally, not relying too much on one country, says **Jane Anson**.

This is a lesson that Australia has learned at a high cost after China applied extraordinary tariffs that decimated Australian wine exports (Zhou & Laurenceson, 2024), and many Chilean wineries that built their strategy around China's surge in consumption are now feeling the pinch of a downturn in their drinking habits (Zúñiga, 2023; Anderson, 2023).

3.3. Love your Region, be an Ambassador

Cristiano Van Zeller told me how he and his friends embraced the difficult situation in the 1980s and decided to expand into dry wines spurred by three factors: love for the region, economic necessity and the thrill of the challenge. We talked at length many aspects of his personal story and of his region but one of the main takeaways was how each wine grower should be an ambassador for his region, embodying its values and traditions.

Building of this persona starts with a deep love for the land. Secondly, he explained how: *“technique can be bought or hired, communication can be studied, but character is built”*, while explaining how credibility comes from personal history plus deep knowledge of a topic. Later on, we discussed how stories are the fundamental selling point of wine, any funny anecdote that can help consumers remember your wine is much more valuable than pH, tannins or any other arid analytical aspect; as a closing remark he told me: *“the wine itself should be the last topic in a conversation about it, whatever you do, never be boring”*. As an example of his outstanding marketing capabilities, he showed me his new project, a mussel-shaped bottle case for selling his new release of Port wine aged under the Atlantic Ocean.

3.4. Dare: Innovation within Tradition

“Tradition is an experiment that worked.”

Émile Peynaud

Luis Pato, self-styled ‘rebel’, is a trailblazing figure in **Bairrada**, Portugal and incarnates the epitome of constant innovation. He told me he had the urge for innovation, and that every vintage he tried new things, even if they did not find a commercial outlet or were not particularly successful, they helped him to improve his winemaking skills. Born within a traditional winemaking family in a very traditional Portuguese wine region, he had to do things differently. First of all, he studied Chemical Engineering and not Oenology, he never got to work with his father, who thought he was ‘too young and

ignorant’, so when he finally had his hands on the till, set himself to change the dubious reputation of the *Baga* grape, typical of Bairrada.

The humid climate and the tannic, almost aggressive profile of *Baga* made the equation almost impossible to solve, but he decided to harvest the grapes in 2 separate moments, first for sparkling wines, and then a few weeks later picking the leftover bunches with concentrated flavors for red wine, ageing it in new French oak barrels; these 2 practices were totally unheard of at the time in Bairrada (Garcias, 2020). But they proved to be successful, as specialized journalists started to taste the wine and encouraged him to keep using his new methods, proving that *Baga* had the potential to make great red wines. I would like to thank him especially for giving me a bottle of my birthyear, the 1988 *Vinhas Velhas* (Old Vines), the first vintage of the first wine from Portugal with this mention, a label that signaled the way for many more wines to come from Luis Pato (Figure 21). After a fantastic lunch trying the local delicacy of ‘*Leitão*’ (barbecued suckling pig with black pepper sauce) and tasting many of his wines; Luis commented on his career saying that a thick skin was necessary to withstand unjustified criticism from traditionalists and how to keep doing the same things over and over would never work, especially in a stagnant wine region. A very important lesson from my visit to Bairrada was to understand how commercial success from one winery can help change the mindset of a whole region, regarding which practices and methods are considered acceptable, as Luis Pato showed the way for many other winemakers.

To end this point, it is pertinent to quote **Isidoro Vajra** from **Barolo**: “*if you don’t innovate within your tradition you are just loving the ashes.*”



Figure 21: Enjoying an evening with Luis Pato, and the fantastic 1988 bottle he gave me.

3.5. Get Local, Get Real

“The privilege of a lifetime is to become who you really are”

Carl Gustav Jung

One of *terroir*'s core tenets is that those characteristics cannot be replicated outside that specific geographical area. Deep understanding and promotion of their *terroir* was a common feature among successful winegrowers, they did not want to copy some other region, but wanted to produce wines that reflected their origin and had a strong sense of pride in their land. In this regard, working with local grapes and honing their management was a key factor in every region visited, given the abundance of local varieties that have adapted for centuries to local conditions, these winemakers are able to craft highly unique wines that cannot be replicated elsewhere.

Most if not all the producers and regions I visited focused in a couple of core styles and/or varieties, not trying to offer too many labels which is sometimes the case in New World wineries. Successful producers in Europe tend to be local specialists rather than generalists, focusing on their strengths while offering a diverse enough portfolio that highlights the local varieties that work well in a given zone. Some outstanding growers visited in this regard were **G.D. Vajra** in Barolo, **José Luis Mateo** in Monterrei, **L'Enclos** by **Roc Gramona** in Penedès and the **Crivelli** family in **Castagnole Monferrato**, Italy.

Some forms of supporting local development are the efforts being done in Italy to identify and rescue ancient varieties with enological potential as tools to face climate change and other future challenges, this a very promising topic which I discussed with professor and researcher **Luigi Bavaresco** at **Università Cattolica del Sacro Cuore** in **Piacenza**, Italy.

Europe has many options to develop in this regard with thousands of native grapes, but for the New World, as we don't have truly native grapes, a detailed *terroir* study should be done in order to choose varieties that adapt well to each grower conditions and also give birth to wines that sell well, considering that there are many thousands of obscure grape varieties but only 30 or so make the most of the market share in worldwide markets (Johnson & Robinson, 2013).

3.6. Quality

“Quality is when the customer returns, not the product.” - John Guaspari

It goes without saying that in order to be successful you need to make good quality wine, unfortunately this is not always the case in some wine regions, both Old World and New. Quality of the product is the cornerstone upon which everything else is built around. And some quality-minded growers were essential for the modern development of famous regions, such is the case of Angelo Gaja in Barbaresco or the Marqués de Riscal in Rioja.

Quality has an objective component: the wine must be fit for drinking and within established levels of the main analytical parameters defined by law such as volatile acidity (an indicator of vinegar presence). It should not have unpleasant smells caused by microorganisms such as *Brettanomyces* or any other major flaw like extreme oxidation. The second element of quality is more subjective and might be a hot topic of discussion among wine critics and experts, there is no definitive consensus on that, as beauty is in the eye of the beholder. Quality is determined in every step of wine production, from vineyard practices to cellar hygiene; it must be looked after by the producers and by the wine region governing body if it has one.

Two of the producers I met during my travels in Italy adhered to the so called ‘natural wine’ philosophy and have been successfully marketing wines that have some evident technical flaws such as high volatile acidity and barnyard smell due to *Brettanomyces*, yet they have found their niche in some markets, this trend should be observed carefully as we are seeing a real-time change in public perceptions of what constitutes quality. Even if it might prove an interesting niche (albeit a small one) for non-conventional producers and daring consumers, one should always remember that trends in wine come and go, yet the classics remain. It is my personal opinion that no winemaking philosophy should be an excuse for sloppy winemaking that masks *terroir* expression and compromises wine ageing potential.

Furthermore, if an appellation system is being used, quality should be monitored by growers themselves and/or by a regulatory body in order to protect brand value, in Rioja this was done for many years by the *Consejo Regulador* (a governing body) but now that the region has grown immensely, some growers are worried the *Consejo* is unable to carry this task in a suitable way and stricter regulations are needed.

Finally, two caveats should be added: first, a grower can only pursue quality if his/her basic needs are met, such as sufficient yield or making enough money from the winegrowing business as to make a living from it. Second, quality alone is no guarantee of success, as many regions producing top quality wines are struggling to sell them given the market fashions and complexities.

3.7. Adaptability

“The only constant in life is change.” - Heraclitus

Successful growers are adaptable growers, navigating changes in market behaviors, weather patterns, clients’ preferences, etc. One great example of the ability to change was seen in Jurançon, France, where growers faced a steady decline in sweet wine sales as preferences changed and decided to focus much more in dry and off-dry styles, creating the new category *Jurançon Sec*, thus being able to survive economically.

I also discussed this point at length with **Xurxo Alba** and **Eulogio Pomares** (Figure 22), two Galician winemakers in **Rías Baixas**, northwest Spain. They explained to me how the international success of the white wines made from *Albariño* grapes was only a recent development in the history of the area, as only 50 years ago, most of the surface was planted with red varieties. But given the humid and cool climate of coastal Galicia they often yielded lean, acidic and tannic wines. **Rías Baixas** has been able to use climate in its favor, sacrifice its red winemaking tradition, and start offering crisp white wines which are actively sought after by wine connoisseurs looking for lighter alternatives and lower alcohol. Growers here were able to detect changes in demands in global markets and focus their efforts into key markets such as United States of America using *Albariño* as their flagship variety, with their success arriving after market conditions changed.



Figure 22: Xurxo Alba from Bodegas Albamar (and his mom’s fantastic *tortilla*) and Eulogio Pomares from Bodegas Zárate.

3.8. Sustainability

“We don’t have to engage in grand, heroic actions to participate in change. Small acts, when multiplied by millions of people, can transform the world.” - Howard Zinn

Regenerative or at least sustainable practices are now present in the vast majority of high-quality growers, and in the future will be a must as customers want their wines to come from producers with a philosophy that cares for the land.

Each of the regions visited had sustainability practices in place. It is important to understand that each producer must assess its own reality regarding environmental, social and economic sustainability and adapt the best practices according to the most important challenges identified. Sustainability is no longer a ‘green option’ or being ‘eco-friendly’, it is a facet of wine production that is deeply embedded in different aspects of the value chain and visiting an assorted group of regions made clear how unique the challenges and the responses are.

Better soil management and natural fertility building through cover crops and avoiding excessive soil tillage were discussed with **Robin Euvrard** a Nuffield Scholar based in Nantes, northwest France. In a similar fashion, grass management between the rows was discussed with Nuffield Scholar **Fred Langdale** in **Hampshire**, southern England. Both of these approaches adapt to the rainy conditions of those *terroirs* but are very different to what is being done in Cataluña or Rioja, where fully tilled rows are the norm to avoid water competition with weeds, this goes to show that there is no ‘one size fits all’ approach.

Other approaches include a holistic approach to the whole process of winemaking, including better water management in vineyard and winery, as well as energy-saving technology, and rescuing old varieties like *Moneu* to cope with climate change as seen in **Familia Torres** in **Penedès**, Spain. All across Europe this is a shared concern among growers and consumers to have a cleaner production system, but sometimes it creates excessive cost pressure in growers who are already struggling financially. **Robin Euvrard’s** work in the **Loire Valley** is a great example of technology transfer, as he consults for other growers and sells vineyard equipment for biodynamic producers, but also shares the information in work groups for like-minded producers ([Figure 23](#)).



Figure 23: Top: Visiting Fred Langdale at Exton Park Vineyard, Hampshire. Bottom left: Robin Euvrard's organic vineyard in Loire Valley, France. Bottom right: viticulture team at Torres showing me grafted vines from the ancient *Moneu* grape in Penedès, Spain.



CHAPTER 4: CHALLENGES AHEAD

Ribeira Sacra, Spain

Several different situations threaten the future of wine, but across different wine regions the growers mentioned some similar challenges:

4.1. Climate Change

Although climate change has been mildly beneficial for extreme cool climate regions, such as southern England, the overall effects across Europe have been largely negative. Extreme weather events, water scarcity and changes in rainfall patterns are a major concern, as many of the regions visited lack irrigation systems. Droughts and heat waves have sometimes severely affected the yield and quality of wine. To hedge against this risk, producers are exploring new grape varieties or rediscovering older, forgotten ones that are better suited to drought conditions. Universities are also supporting these efforts with research on improved vineyard practices to help growers adapt to these new conditions. One major risk is the lack of infrastructure, such as irrigation channels and reservoirs, in some European wine-growing areas. Since investments in such infrastructure usually take many years to complete, growers' ability to respond quickly may be compromised.

4.2. Skilled labor shortage

It was surprising to see how some regions in Spain relied on pruners from Moldova, while in England, vineyard workers were recruited from Ukraine. This reliance on bringing in cheaper labor from less prosperous economies into wealthier countries raises questions about the long-term sustainability of this model. As countries prosper, and more people move away from farming, this model does not seem sustainable in the long run. Many growers mentioned that it is becoming increasingly more difficult to find skilled workers for vineyard tasks, even for well-paid positions, such as tractor drivers in Barolo, Italy. To address this, countries need to invest in building the capacities and skills of their own population and ensure that farming remains an attractive sector for younger generations. This means fair wages, career growth opportunities and healthy rural lifestyle. One sustainable model being used in Barolo involves offering flexible job positions that combine work in the vineyard and the cellar, depending on seasonal needs. This reduces reliance on external workers and ensures that personnel are involved in all aspects of production, providing them with stable employment.

Another strategy for securing a skilled workforce is through educational institutions that prepare the next generation for careers in winemaking. These may include technical superior schools for vineyard and cellar workers (such as the one established in **Priorat** in the 1980s) or universities focused on wine-related scientific fields, such as **Bordeaux Sciences Agro & ISVV**.

4.3. Transition to the next generation

José Luis Mateo from **Monterrei** in Spain thinks that: “*wine regions are only sustainable in the long term if they offer opportunities for new generations*”. A common concern among growers is not being able to secure the transition of wineries and vineyards to the next generation. This can be due to a lack of heirs with the necessary skills or interest to do so, or because economic pressures make it impossible to sustain a living from the land.

In some extraordinary cases, poverty is not the issue, but rather the skyrocketing cost of land. For example, in **Barolo**, land for vineyards has become so expensive (ranging from 2 to 4 million euros per hectare), that sometimes heirs who wish to continue the family business may not be able to afford inheritance taxes or buy out siblings who are not interested in continuing the farm. Ensuring that the wine sector, and countryside living, are attractive again (both economically and socially) will help to encourage young professionals to carry on the farming activities started by previous generations.

4.4. Changes in lifestyle and consumption patterns

Jurançon producer **Irène Ghilhendou** noted that one of the failings of the wine industry has been making wine too complex and inaccessible for younger generations. As beer, spirits and other alcoholic drinks continue to erode wine’s market share, often through simpler messages and mass-marketing campaigns, the wine industry must make a concerted effort to make wine more accessible. This can be achieved by highlighting its natural origins, versatility, and its unique role as a reflection of local culture. Stronger efforts are urgently needed to engage new generations, understand their preferences, and adapt wine marketing accordingly.



Mural in Haro, Rioja, Spain

CONCLUSIONS

As seen in this report, each wine appellation has its unique history of success and struggles. In the end, achieving long-term recognition in the markets is multi-factorial and highly dependent on local characteristics. Most successful regions visited exhibited a large number of committed growers attaining critical mass; various degrees of associativity, whether legal (such as AOP/DO/DOCG) or voluntary (marketing associations or collective brands); strong auxiliary institutions such as educational institutions, research centers or government investment; and finally, apt tourism infrastructure and a well-defined cultural identity. A fitting summary of the whole process of revival of a wine region considering wine production, tourism and institutions can be seen in [Figure 24](#).

In the case of wine producers, several factors are needed, most importantly: quality-oriented winemaking as a basis for all further development; a resilient mindset; a diversified approach to marketing and income sources; adaptability to market fluctuations and a strong identity based on local competitive advantages.

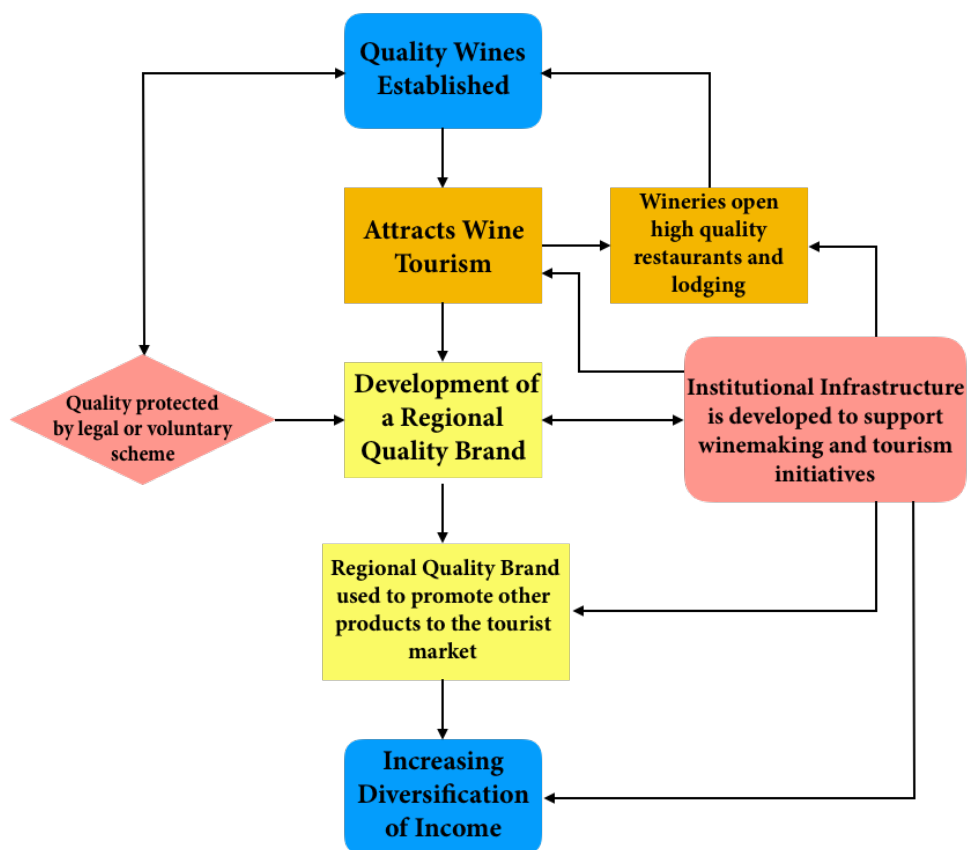


Figure 24: Process leading to the revival of a wine region. (Source: adapted from Barcelona Field Studies Centre, No Date).

RECOMMENDATIONS

- Form associations of like-minded growers under a common regional name or brand. Define key principles and regulations, while allowing room for individual creativity. Keep quality as the cornerstone of the association.
- Establish good communication channels with wine writers, critics and specialized press, in order to spread the message. Whenever possible, support group marketing activities for your regional brand, keeping the message simple.
- Find common identity grounds with neighboring wineries. Define local characteristics worth highlighting, such as traditions, architecture, cuisine, natural landscape, etc. in order to support a wine-related tourism offer.
- Procure constant feedback from your key markets, whether it be importers, sommeliers, final consumers or tourists. Make sure their needs are being met, adjusting your marketing and winemaking accordingly, but without losing your identity.
- Think of wine as a multi-generational business, secure the transition to future generations by offering educational and work opportunities in your sector. Form alliances with governmental institutions that can support these endeavors.
- Ensure sustainability is intertwined in every aspect of the business model.



Vineyards in Monforte d'Alba, Barolo, Italy

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APPENDIX 1: List of visits

Below is a list of all the visits during my personal travels, should any Nuffield scholar in the future wish to visit these places, I would be glad to provide contact details.

ENGLAND

· Hampshire

Exton Park Vineyard, 2020 NSch Fred Langdale, Exton

· Kent

Greenacres Farm, 2020 NSch David Butler, Sittingbourne

FRANCE

· AOP Anjou

Château Soucherie, Beaulieu-sur-Layon

· AOP Irouléguay

Domaine Domenica, Diane & Bixente Oçafrain, St. Étienne de Baigorri

Domaine Xubialdea, 2017 NSch Stéphanie Chanfreau, Baigorri

· AOP Jurançon

Domaine Latapy, Irène Guillhendou, Gan

Domaine Larroude, Jérémy Estoueigt, Lucq-de-Bearn

· AOP Muscadet Sèvre et Maine

Domaine Famille Lieubeau, Vincent Lieubeau, Château-Thébaud

· AOP Ossau Iraty (Cheese)

Syndicat Ossau Iraty, Elodie Paiva, St Jean Pied de Port

Angers

L'Ecole Supérieure des Agricultures (ESA), Professor Cecile Coulon-Leroy

Bordeaux

Conseil Interprofessionnel du Vin Bordeaux (CIVB), Cristophe Chateau

Institut des Sciences de la Vigne et du Vin ISVV, Professor Guilherme Martins

Bordeaux Sciences Agro University (BSA), Professor Alfredo Coelho

INTERCO, Christine Pecastaingts

INNOVIN, Gracie Boland

Jane Anson

Nantes

Pont Marmite/Eco-Dyn, 2023 NSch Robin Euvraud, Le Loroux - Bottereau

ITALY

• DOCG Barolo

E. Pira & Figli - Chiara Boschis, Chiara Boschis, Barolo

Brovia, Alex Sánchez, Castiglione Falletto

Paolo Manzone & Agriturismo Meriame, Paolo Manzone, Serralunga d'Alba

Conterno Fantino, Monforte d'Alba

G.D. Vajra, Isidoro Vajra, Barolo

• DOC Colli Piacentini

La Stoppa, Elena Pantaleoni, Rivergaro

• DOCG Ruchè di Castagnole Monferrato

Crivelli, Jonathan Crivelli, Castagnole Monferrato

• Piacenza

Università Cattolica del Sacro Cuore, Professor Luigi Bavaresco

• Piemonte

Cascina Tavijn, Nadia Verrua, Castagnole Monferrato

Agriturismo Il gioco dell'Oca, Barolo

PORTUGAL

• DOC Porto & Douro

Niepoort, Stefano Marellò, Porto Cellars & Quinta da Napoles in Douro

Van Zellers & Co., Cristiano Van Zeller, Porto

Quinta do Noval, Porto

• DOC Bairrada

Adega Luis Pato, Luis Pato, Amoreira da Gândara

SPAIN

• DO Empordà

Terra Remota, Sant Climent Sescebes

• DO Monterrei

Quinta da Muradella, José Luis Mateo, Verín

• DO Penedès

Torres, Mauro Sirvent, Penedès

L'Enclos de Peralba, Roc Gramona, Sant Sadurni d'Anoia

• DOCa Priorat

Mas Martinet, Pere Vall, Gratallops

Cims de Porrera, Marc Pérez, Porrera

• **DO Ribera del Duero**

Bodegas Vizcarra, Celia Vizcarra, Mambrilla de Castrejón

Bodegas AALTO, Antonio Moral, Quintanilla de Arriba

Museo Provincial del Vino, Castillo de Peñafiel

• **DO Ribeira Sacra**

Algueira, Fabio González, Sober

• **DO Ribeiro**

Adega A Barouta, Roberto Nuñez, Leiro

• **DO Rías Baixas**

Albamar, Xurxo Alba, Cambados

Zárate, Eulogio Pomares, Ribadumia

• **DOCa Rioja**

Urbina, Ángel Urbina, Cuzcurrita de Río Tirón

Muga, Haro

Aiurri, Neza Skrt, Leza



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