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A History of Wine in Europe, 19th to 20th Centuries, Volume II

Markets, Trade and Regulation of Quality

Edited by

Silvia A. Conca Messina · Stéphane Le Bras
Paolo Tedeschi · Manuel Vaquero Piñeiro



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Editors

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Terroir, Institutions and Improvements in European Wine History: An Introduction

Silvia A. Conca Messina, Stéphane Le Bras, Paolo
Tedeschi and Manuel Vaquero Piñeiro

The Research Project and the Relevance of the Topic

The project of a book collecting papers about different European wine regions was developed during Spring 2017 by Paolo Tedeschi and Manuel Vaquero Piñeiro, scholars in economic history and members of the informal group of research about the Italian Oeno-History.

Considering that, from food and agricultural history points of view, the wine sector is at the core of the present scientific debate and the social, economic and legislative relevance of the products of the terroir

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are receiving ever more attention in the field of scientific literature,¹ this research project and the consequent two volumes which were realized aim to show that the wine history has to start by the analysis of the evolution of the single wine regions. This evidently does not imply that the State was not important for the improvement of the quality and quantity of the European wine production: the mainstream idea is that local winegrowers and winemakers' choices were fundamental to develop a successful wine conquering the world wine market or, in the opposite, to explain the decadence or the limited diffusion of a wine. The State and, more in general, public institutions (local or European) guaranteed a support (minimum or relevant) and established rules to follow during the winemaking, but they were not able to create homogeneous wines. Face the changes of laws and other relevant exogenous factors (as the arrival of diseases and new technological innovations) each wine region gave a different answer and so chose a different way of development allowing (or not) the winemakers to improve the quality of their production and to extent their market. So, only for the mass media and the statistics, it exists a French (or an Italian or a Spanish, etc.) wine: in the real oenologic world there only exist the wine regions of Barolo, Bordeaux, Champagne, Chianti, La Rioja, Tokaj etc.

¹For the increasing interest and relevance of the “wine history and wine economics” and the rapid rise of its social and economic relevance throughout the world, it is important to remember the launch in 2006 of the “Journal of Wine Economics” (Cambridge UP) edited by the American Association of Wine Economists: it joined the “International Journal of Wine Business Research”, the official outlet of the Academy of Wine Business Research, which was launched in 1989 (under the name of “International Journal of Wine Business Marketing”). Concerning in particular the wine history see, among others, the following publications which also include relevant studies on legislation in the wine sector: Unwin (1996, 236–321), Bisson et al. (2002, 696–699), Campbell and Guibert (2007), Simpson (2011), Lukacs (2012), Harvey et al. (2014), Harvey and Wayne (2014), Tattersall and De Salle (2015), Meloni and Swinnen (2016), Anderson et al. (2017), Anderson and Pinilla (2018), and Alonso et al. (2019).

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As the proposal was considered original and interesting and met the favourable answer of lots of colleagues working in European universities, it was possible, thanks to the precious collaboration of Silvia A. Conca Messina and Stéphane Le Bras, to produce two volumes analysing the wine history of lots of different European wine regions and, at the same time, illustrate the role of national and European institutions in the development of the wine sector.

The two volumes show how the wine market was made and shaped by three actors, that is producers, sellers and public authorities (municipalities, countries and European Union) and that there existed (and continue to exist) different wine markets depending on price and quality of the product (the wine for old taverns and modern supermarkets is very different from the wine for three stars restaurants or niche luxury market) and consumers' regional customs and tastes (German wines always have a few market in France and Italy, rose wines are only for young people and they were often created by producers who want to diversify their products and create a new wine market, etc.). It is important to note that all wine producers had to constantly achieve compromises with their consumers, including those making high-quality wines: the example of the best production in the Champagne region is evident (Perron 2010). Besides it was important, in particular from the last decades of the twentieth century, the historical relevance of the concept of terroir, the wine producers' appropriation and invention of the tradition and the related marketing based of the (clearly false) concept that in the past the wine was more organic and good (Marache and Meyzie 2015; Reckinger 2012; Demoissier 2010; Charters 2006). Again the French market (or the Italian and Spanish ones) and the related average prices exist only in the statistics: they did not really explain what has happened in the wine history (and also in the present wine world) with the important, but rare, exception represented by local analyses which are able to use long term prices concerning one defined product (Chevet et al. 2011). Furthermore, these volumes aim at underlining that the history of wine should be based on data and information from both archives and official statistics. The combination would make it possible to better highlight the actual decisions taken by winemakers about wine production in a defined wine area (Le Bras 2019).

In these two volumes most of the contributions concern Italian and French wine regions: this is obviously linked to the origin of the project and the editors, but it is also related to the evolution of the European wine history. The modern viticulture was born in France and the first producers in the world are (and had been for the last two centuries) France and Italy. The others European countries simply copied the innovations coming from France thanks to the network of the agrarian reviews and congresses which started in Europe during the first half of the nineteenth century (Locatelli and Tedeschi 2015): this network allowed the international diffusion of the know-how concerning wine-growing and winemaking. This transfer of knowledge was implemented by migrants coming from Italy, France and Spain who progressively developed a local viticulture in Chile, Argentina, USA, New Zealand, Australia etc.: new wines progressively entered in the world wine market and this last became more competitive (Anderson 2004; Lukacs 2005; Anderson and Pinilla 2018). The French wine sector (the most modern in the world) obviously represented the most important reference for all people who wanted to invest in the wine industry, but the diffusion of the ampelographic know-how allowed to better imitate the French productive system and so some wine producers started to make products whose quality was not so inferior to the French wines. In particular, during the second half of the twentieth century, the Italian wine production progressively increased in quality and quantity: in the new Millennium the Italian wine sector became the first in the world for the total production (about the primacy concerning quality authors of these volumes obviously do not enter in the debate). All this clearly explain why the studies about the history of the French and Italian vines, wines and winemakers are so numerous and it is very difficult to indicate all of them.²

²It is impossible to quote every recent article and book about French and Italian wines in the nineteenth and twentieth centuries. Only considering the volume and papers published by academic historians and agronomies in the new Millennium it is possible to see, among others: for France see Lachiver (1988), Sagnes (1993), Paul (1996), Stengel (2013), Bodinier et al. (2014), Le Bras (2017, 2019). For Italy, Pedrocco (2000), Failla and Scienza (2001), Agnoletti (2002), Gangemi and Ritrovato (2002), Tedeschi (2003, 2017), Zoia (2004), Leonardi (2006), Ciuffoletti (2009), Dandolo (2010), Maffi (2010, 2012), Ottolino (2011), Mainardi and Berta

These volumes also include some contributions that allows readers to discover the evolution of the viticulture and winemaking in other European regions (or small countries) as the Mosel (Germany), the Slovenia, the Catalonia, the Luxembourg and Porto (Portugal). There are unfortunately some relevant absences, e.g. some Spanish or German regions (as La Rioja, Castilla-La Mancha, Franconia, Palatinate, Rheinland, etc.) or the Hungarian Tokay³: this simply depends on the fact that no other colleagues accepted to write because they had no time.

Even these lacks, these volumes allow scholars the opportunity to make interesting comparisons between different European winemaking regions. They, in particular, put in evidence that the “road to success” followed by lots of European wines can share the same characteristics, in particular when terroirs are located under the same public authority and legislation, but it is also possible that there exist very different trajectories depending on the different wine producers’ decisions and their ability in lobbying with the public authorities. For example the choice to create cooperatives was very important to overcome the negative effects of the crises linked to the fungal and insect attacks and to improve the ratio quality/price of the wine production and moreover the distribution of the wine, before in the local market and then in the national and international ones.⁴

The European wine regions had in fact to face the following events arriving from the last decades of the nineteenth century and the end

(2013), Mocarelli (2013), Gasparini (2014), Carassale (2014), and Zanotti (2015). In Italy the substantial interest in this topic is also demonstrated in particular by the eight volume collection concerning the regional history of vines and wine (*Storia regionale della vite e del vino in Italia*) and by the other numerous books edited by important experts in oenology as well as professional *sommeliers*.

³Among the major limits of this collection, the lack of contributions on Castilla-La Mancha, the Spanish region that currently covers 46% of the Spanish vineyard area and 13.6% of that of the EU, and on other relevant French and Italian wine regions. However, it is evident that it was not possible to consider all European wine regions. About the Spanish wine sector see Muñoz Moreno (2009). Besides about the German wine sector, other the contribution of Thomas Schuetz in these volumes, see Bird (2005) and Brook (2006). Finally, about the Hungarian wine sector see Rohály et al. (2003).

⁴The relevance of the cooperative wineries for the European wine sector is put in evidence in lots of contributions of these volumes. See also, among others, Planas (2016) and Simpson (2000).

of the twentieth one: the reduction of the land set aside for vineyards, a careful selection of vine varieties, the growth in investments for the improvement of manufacturing techniques and of the quality of the cellars, a progressive differentiation of wines according to the geographical origin of vines and an increased attention towards the retailing sector and to consumer tastes. Even if some events were similar, e.g. the strong increase of the productive costs following the arrival of the fungal diseases (*oidium* and *peronospora*) and insect (*phylloxera*) attacking the European vineyards, it is possible to note different evolution in France, the country where lots of wines showed a high-quality level during the nineteenth century, when in other European areas the high-quality wines represented some exceptions in a context presenting a low quality for most of the production arriving from the terroirs. In this case it became very relevant the considerable differences in the social and economic position of viticulturists and winemakers: French winemakers, for example, were able to organize mass protests against the government policy on wine (in particular in the early twentieth century) and set up a number of powerful regional associations (like the *Confédération générale des vignerons du Midi* or the *Fédération des Syndicats de la Champagne*). They were able to influence the legislation: they laid down a set of guidelines for winegrowers during the 1930s and the related birth of the Controlled Designation of Origin (in French language Appellation d'Origine Contrôlée, AOC) (Wolikow and Humbert 2015). They acted on behalf of their members and, in an attempt to reduce distribution costs, they held negotiations with wine retailers and bottle maker's associations (particularly in the case of *Champagne*).⁵ In other European countries this did not happen or it arrived later or it had small dimensions, that is it was limited to a discrete lobbying action to obtain some tariff protection or subsidies and, moreover, the discussions about the CDO finished without guidelines and some winemakers who underlining that CDO protected the worst producers and that the

⁵On French viticulturists and winemakers and their relations with the State and with wine retailers see, among others, Sagnes (2008), Bagnol (2010), Lucand (2011), Palaude (2012), Le Bras (2013), and Planas (2015).

best wineries had in their name and history all the necessary to conquest the wine market.⁶

It is evident that where the legislation regulated the winegrowing and winemaking it was very important the ability of local producers to obtain rules which were favourable to the characteristics of their wines. Where the public authorities were absent, the winegrowers and winemakers associations assumed the role of the main player and, by the definition of the guidelines and orienting the investments to modernize the productive system, decided the future of the local viticulture. The role of investments was fundamental because, although viticulture naturally remained a rural activity, it gradually became industrialized. In particular during the last few decades of the twentieth century, winemakers who wished to remain competitive in the new worldwide wine market had to modernize their interactions with consumers and retailers and become fully integrated into the industrial sector: this arrived both in the European terroirs and in non-European wine regions (Doloreux and Lord-Tarte 2013). This has been accompanied over the last 25 years by the rapid rise of wine tourism, which has had the effect of increasing the social and economic impact of the wine sector (and justifying new academic studies).⁷

Notes About the Terroir, Technology, Public Institutions and Related Improvements in European Wine History

Over the past 150 years, the total world volume of wineproduction has grown from 10 to 27 billion litres per year (Anderson et al. 2017). In the 1860s, almost all of it was produced in Europe; after a century and

⁶About the relevance of rules established by the European institutions for the European wine sector see, other the contributes in these volumes, Gaeta and Corsinovi (2014).

⁷For recent studies on the wine industry see also *The Journal of Wine Economics*, *The International Journal of Wine Business Research*, as well as the *Conference proceedings of the Academy of Wine Business Research* from 2003 to 2014 (<http://academyofwinebusiness.com>). For wine tourism see, among others, Hall et al. (2000), Carlsen and Charters (2006), Asero and Patti (2009), Boatto and Gennari (2011), Cavicchi and Santini (2014), and Vaquero Piñeiro (2015b).

a half—despite the emergence of new competitors and the globalization process—the volume of wines produced in European countries is still around six-tenths globally, while exports exceed two-thirds of the wine traded throughout the world. In the last two decades of the twentieth century, exports from the old continent represented, in monetary value, more than 90% at the global level; while they fell to slightly above 70% in the first 16 years of the twenty-first century alone. In 2016, out of the \$32 billion of wine exported throughout the world, France held the record with \$9.13 billion, Italy (which had reached first place in volume of production) followed it with \$6.22 billion, ahead of Spain (\$2.96 billion).

Therefore, Europe has been able to maintain clear leadership both in the volume of production and in monetary value, despite the process of globalization. This process of “slowed down” and “delayed” globalization in the wine sector has undergone a change in very recent times, beginning in the last three decades, with the strengthening of important competitors (e.g. Australia, New Zealand, Argentina and the United States) and, in last few years, with the development of new markets such as China, which in turn is fostering the growth of the sector. Nevertheless, outcomes are not easily predictable, mainly because wine is not like other “agro-industrial” products. Producing good wine requires certain skills and factors which are not so easy to relocate: they are complex, variable, difficult to reproduce. Probably, the main feature of wine is the variety of its products and the complexity of all the factors that make it possible to achieve a certain quality and a diversified, typical and unique offer.

The history of wine is inextricably linked with the history of Europe, its agrarian systems, its territories, its institutions and its local traditions. Its success in the world in the last two centuries should not be taken for granted. The essays collected in this volume try to offer a picture of the wine industry’s production and retailing systems in various European regions over the last two centuries. In order to better understand its economic significance, the authors have tried to set the production and sale of wine in their historical context, namely the European rural society and its institutions as well as the wine merchants. Thus, the essays allow us to trace the transformation of production, marketing and

distribution, the evolution of trading and consumption markets. They also highlight the advancements in science and techniques, the issues of cultural representations, the role of agricultural and educational institutions, the influence of economic policies, as well as the emergence on the scene of economic actors and entrepreneurial initiatives of various dimensions and social origins: from the small–medium enterprise to the large multinational, from the family business to the consortium, from producers belonging to the aristocratic classes to merchants or peasants.

As it emerges from this collection of contributions, Europe now reaps the benefits of a slow and contrasting evolution that began in the first half of the nineteenth century, when France started to establish the modern global wine industry. The search for wine quality—the key element of its economic success—required a series of cultural, institutional, political and entrepreneurial components strongly linked to the wine producers and terroirs. During the nineteenth century, some radical changes were introduced regarding the two main production systems into which the sector was divided: on the one hand, the production for self-consumption or local sales; on the other hand, specialized production aimed at satisfying external, interregional or international demand. Although in several European regions—including Italy and France—the mixed system remained largely predominant for a long time, from then onwards, the growth of markets, the refinement of production methods, cultural values, scientific knowledge applied to cultivation and winemaking processes underwent sweeping changes. In terms of quantity, the volume of wines destined for sale during the year continued to be prevalent for a long time as this kind of production was within the reach of small winemakers. However, at the same time, the experimentation and refinement of vintage wines increased and required much greater investments (e.g. in cellars, barrels for preservation) in view of a considerably higher profit.

The aristocratic and bourgeois classes that emerged from the Napoleonic wars were the first to embrace this tendency towards the qualitative improvement of wines, often emphasized in this volume. They considered the production of wine and the consolidation of oenological science as an effective factor for social identity and investment. In the beginning, these improvements were undertaken with the liqueur

wines (Porto, Marsala, sherry) launched by the British on the national and international colonial market. Then—also in the wake of the reputation and appeal created by Champagne—came the turn of the most widely consumed table wines, which also became the subject of vigorous modernization. While liqueur wines were intended to satisfy the narrow demand of the élites, in the case of the much more widespread red and white wines, it was a matter of introducing changes into a fully consolidated sector, rather behind in its ways but based on centuries-old knowledge handed down from generation to generation. Therefore, the innovations did not always find a fertile ground on which to develop. There was much resistance and the wine had to be suitable for certain tastes: changing it also meant bringing changes to everyday life and, in the long run, social practices. Moreover, for many farmers and owners it was a question of continuing to have wine for domestic consumption, completely leaving aside the unknown world of the market and commercial trade.

Nevertheless, as several of these essays highlight, a common trend was underway throughout Europe: the transition from an oenology aimed at the production of large quantities of wine for local or national consumption to one which was more attentive to quality, safety and the promotion of a precise image. The research and development of bouquet and taste, which are typical of good wine, involved a growing number of operators throughout Europe. They accumulated more precise knowledge about vines, the condition of grapes at harvest time and winemaking methods. All of the most intricate aspects of wine handling (types of barrels, periodic decanting, contact with oxygen, control of temperatures and environmental conditions) were investigated and studied by local institutions and the most advanced operators (generally those in contact with international markets).

Vine diseases, which affected crops all through the nineteenth century (*oidium*, *phylloxera*, *peronospora* or downy mildew, black rot), led to a dramatic reduction in harvests in France, the major European producer, but represented an opportunity for viticulture expansion in Italy and Spain, which were hit only later. Each country reacted with its own systems, but generally, the diseases increased the attention that was paid to the vineyards and stimulated the qualitative improvement

of production. Although only a few producers decided to specialize in high-quality production, the characteristics of European wines improved everywhere, at least regarding the way wines were produced and sold. In southern Spain and Italy, the great variety of traditional vines required extensive experimentation in order to identify the most suitable rootstocks, while other areas focused on growing better quality grapes and abandoned marginal vineyards. In Slovenia, after the outbreak of *phylloxera*, viticulture and winemaking were re-established in line with the rules and methods applied in the Habsburg monarchy.

The variable influence of the diseases from region to region and the temporal differentiation of their effects are recurrent themes in the essays of this volume, which capture the turning points and the transformation from a variety of local oenological traditions to a larger agromonomical and technical landscape on a continental scale. Around 1850, the birth of European oenology was underway, later to spread worldwide. The fight against these plagues had long-term effects on European viniculture and was the driving force in bringing producers and scientists together and creating local institutions, schools and producers' associations. Some general consequences of *phylloxera* and *peronospora* are easily recognizable: a decrease in the number of small producers due to the growing costs of new grafts and of monitoring and looking after the crops; the increase of the capital required both to combat the diseases of the vine and to expand the production of vintage wines; the growing recourse to science; the development—or at least the planning—of legislation aimed at guaranteeing the origin of wines, both to fight against the increasing chemical sophistication of wine as well as to support exports; the growing urban demand for popular wines improved transport systems, the increasing power of commercial houses; beginning in the nineteenth century, the expansion of viticulture in the colonies by Europeans.

The recurrent crises of overproduction (and therefore of prices) were among the most difficult economic problems for European winemakers. The crises depended on variable productivity from year to year and on the fact that investments encountered difficulties in following such unpredictable market trends (also considering that newly planted vines required a certain number of years before they started to produce

grapes). Fraud was as well an important issue and a market-confusing variable, leading to regional uprising in France and legislative response. Many of the changes in the wine industry introduced during the twentieth century were aimed precisely at reducing this variability as much as possible, e.g. the vertical integration of production, technical progress aimed at creating wines with the most constant characteristics, the growing importance of, first, major producers and then large multinationals which were able to provide the vast capital necessary to invest in new technologies and marketing.

Everywhere in Europe, regardless of the agricultural structure and the characteristics of wines, public institutions played a decisive role, with the creation of schools, cooperation systems, industrial exhibitions, experimentation centres and the application of scientific knowledge. Beginning in the nineteenth century, the creation of new agricultural schools and public institutions for the improvement of rural activities helped winemakers in various ways: lectures, conferences, bulletins, newspapers, the dissemination of news concerning innovations in viticulture (wine production and preservation, the prevention of and cures for diseases, etc.). Various competitions and exhibitions for scholars and producers were organized with the specific aim of increasing the productivity of the vines, while for others it was to improve the resilience of the wine during transport. Moreover, other means such as agricultural almanacs and calendars contributed to the dissemination of knowledge concerning ampelography and oenological practices. The regional studies collected here help to better define the tangible systems of transferring know-how and its impact on production practices. France was—and has remained—the country of reference for wine producers and consumers, a leadership based on an enduring institutional tradition in supporting French products and on maintaining the quality of a product whose roots lie in the early-modern age. The creation of institutions to support the sector was decisive even in areas such as Bordeaux, which had long enjoyed international prestige. In this area too, it was the institutions which led initiatives in promoting local wines, marketing and various other actions aimed at improving every aspect of production and trade: vineyards, commercial networks and

logistics facilities, brokerage houses, brand promotion and enhancement and state-endorsed ranking (1855). Besides, the economy—and the reputation—of the area included not only the most prestigious brands and names, but also small producers, wine growers and wines of average quality. At every stage of this story, cohesion—which does not necessarily mean solidarity—was at stake, to preserve or rebuild the brands and the overall reputation of the region.

A further important aspect which emerges from reading the essays is the close relationship between the wine and its *terroir*—i.e. the land, the region where the vineyard is cultivated. Even if “*terroir*” is a highly debated concept—especially because it fosters a strong geological determinism that excludes or underestimate the role of other factors (e.g. human interventions)—it is a practical one, allowing territorial and cultural comparisons. Wine is a typical product of European civilization and culture, has shaped the agricultural landscape and, more recently, has assumed increasing importance in the tourism industry. It is no coincidence that wine is one of the main strengths for territorial brands and for the creation of tourist destinations whose appeal lies in “authentic” food or wine and short supply chains.

Last but not least, the volume also tries to consider the differentiated impact of legislation concerning indications of the product’s origin. Although several price-dependent markets persisted, the average quality of European wines progressively improved after the establishment of the Common Agricultural Policy. In Italy, the new CAP rules made an important contribution to the improvement and qualitative diversification of wine, a differentiation which involved both the production processes as well as the logistics and supply chains. In France, campaigns of uprooting from the 1970s to the 1990s changed the face of mass-production vineyards: thanks to the bonuses granted by the CAP, new qualitative vine stocks were planted, improving the general level of the French wine sector, especially the ordinary wines.

As a whole, the process of transformation of the European oenological industry appears as variegated as its wines. It has been a journey of modernization that every country, every region and every territory has interpreted in an original way and at its own pace. Nevertheless, its

common ground lies in its transition from an oenology aimed at producing large quantities of wine, to one which places greater value on the product's quality, safety, promotion and reputation.

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