



Sancerre's single vineyard wines versus formal cru classification systems:

An investigation of Les Monts Damnés, Les Culs de Beaujeu, and

Chêne Marchand.

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## 1. SUMMARY

Sancerre has no formal cru classification system, but its growers have long practiced marketing single vineyard wines, and this trend is on the increase. By investigating three prestigious sites (Les Monts Damnés, Les Culs de Beaujeu, and Chêne Marchand) this Research Paper examines the trends in pricing and yield in Sancerre's single vineyards versus traditional Sancerre. It further compares Sancerre to other appellations with formal cru systems to determine whether Sancerre could, and should, apply for cru classification.

Through quantitative questionnaires and interviews with producers the study found that these three Sancerre single vineyards already achieve the economic uplift of a *de facto* cru classification system with an average ex-cellars price 69% higher than traditional Sancerre blanc. It also found that, whilst there remains scepticism that a hierarchical cru classification system along traditional lines would benefit Sancerre, a review of its *cahier des charges* and stricter governance of single vineyard wines by the Institut National de l'Origine et de la Qualité's (INAO) regulation has significant support amongst producers.

## 2. INTRODUCTION

The Central Loire appellation of Sancerre has no official hierarchical system. Nevertheless, it has a long history of single vineyard wines and premium *cuvées* that are produced alongside its communal wines. A cru system in Sancerre has been debated and rejected more than once by its Growers' Syndicate, and as recently as February 2017 the Prospective Commission for Sancerre<sup>1</sup> met to discuss the tightening of regulations around *lieux dits*.

Erstwhile president of the Service Interprofessionnel de Conseil Agronomique, de Vinification et d'Analyses du Centre (SICAVAC), Bertrand Daulny (2017, pers comm.), says, "from a purely technical standpoint, Sancerre should have had a cru system"<sup>2</sup>. However, he remains sceptical that it should have a cru classification system introduced now for fear of destroying local accord. It is this conflict that the Research Paper will examine.

As the Research Context will lay out, commentators, authors, and journalists have frequently discussed Sancerre's conspicuous lack of formal cru system (see section 3.2); regional experts have identified an increasing trend of single vineyard wines coming on to the market over the past decade (*ibid.*); and general theoretical studies around names, classification and reputation in a wider context have been conducted (see section 3.5). However, no empirical study has yet been carried out regarding the use of single vineyard names and their

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<sup>1</sup> A syndicate of around 40 growers who debate ideas for the future of Sancerre.

<sup>2</sup> In 2016 Daulny carried out a technical tasting in collaboration with the Maison de Sancerre of three vineyards in Bué: Chêne Marchand, Grand Chemarin, and Petit Chemarin, which aimed to understand the characteristics of these *terroirs* and learn more about the common characteristics shared in the wines produced from each.

relationship with price in Sancerre. Such information would likely be necessary to formally apply for a cru system, since the INAO base decisions on a number of criteria including technical aspects of the sites, but crucially, also on historical references, current usage, and evidence of established price uplift (Burrier, 2016, pers comm.).

This study will investigate whether Sancerre has already achieved the economic benefit of a cru system, help to identify strengths and weaknesses of the current situation, reflect on the potential advantages and disadvantages of the implementation of a cru system, as well as gauge appetite amongst growers for one. By studying three of Sancerre's most historically and currently important *lieux dits cadastrés* (registered named places) this paper will ask:

1. What is the economic uplift that growers are currently achieving across Les Monts Damnés, Les Culs de Beaujeu, and Chêne Marchand in comparison with traditional Sancerre, and has this been stable or divergent over the past five years?
2. In comparison with other classified appellations, have the growers of Sancerre already achieved a *de facto* cru system in these three *lieux dits* in terms of price and yield?
3. Should Sancerre consider a cru classification system, and what would be the pros and cons for the appellation?

### 3. RESEARCH CONTEXT

#### 3.1 Historical context

Sancerre can date its vinous history back to the 6<sup>th</sup> century (INAO, 2011), and today covers 2,964 hectares (ha) across 14 villages (BIVC, 2016). Two varieties, Pinot Noir and Sauvignon Blanc, are permitted within the appellation. The region had historically been known more for its red wines, but after *phylloxera* spread through France in the nineteenth century most of Sancerre's Pinot Noir vines were replanted with grafted Sauvignon Blanc (BIVC, 2016). It gained appellation status in 1936 for its white wines, followed by recognition for its red and rosé wines in 1959 (*ibid.*). The region's soils are diverse, including: *terres blanches* (Kimmeridgian marl located mostly on the hills west of the town of Sancerre, particularly Chavignol and Amigny); *caillottes* and *griottes* (pebbly limestone soils found throughout the appellation, derived from the Portlandian, Oxfordian, and Kimmeridgian eras); and *chailoux* or *silex* (flint soils found on the eastern slopes of the appellation) (Frankel, 2014, and Daulny, 2017, pers comm.). Its terrain is varied too, hung around hills and valleys that radiate out from the eponymous hilltop town in the east of the appellation.

The Bureau Interprofessionnel des Vins du Centre Loire (BIVC) (2016) reported a total production in 2015 of 177,134 hectolitres, of which 60% was exported. Much like the rest of the Loire, Sancerre only has one tier of classification:

Appellation d'Origine Contrôlée (AOC) Sancerre<sup>3</sup>. With a few notable exceptions, Sancerre remains a community of smallholders whose estates are fragmented across the appellation's hills<sup>4</sup>. Its soil and topographical diversity means variable quality and character across vineyard sites, and the superiority of certain sites has been a part of Sancerre's lore for generations.

### **3.2 The single tier system in Sancerre and the absence of crus**

The use of single vineyard names and the superiority of certain sites within Sancerre has been shown by Thibault Boulay to have a history dating back to the Middle Ages in his book, *Le Vignoble de Chavignol: Voyage dans un Paysage* (2017). In the modern age of domaine bottling, the first producer in Sancerre to bottle and market single vineyard wines was Marcel Gitton in Ménétréol in 1958 (Gitton, P., 2017, pers comm.)<sup>5</sup>.

There is a persuasive catalogue of experts who have proposed the potential for a cru system in Sancerre. In his book *Les Vins de Loire*, the then president of the INAO, Pierre Bréjoux (1956), laid out 'Les Principaux Crus' of Sancerre naming 27 sites, including Les Monts Damnés, Les Culs de Beaujeu, and Chêne Marchand.

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<sup>3</sup> The exceptions within the Loire are Quarts de Chaumes Grand Cru and Coteaux du Layon 1er Cru Chaume, and four crus in Muscadet, which were classified between 2011 and 2014.

<sup>4</sup> The average producer owns 10ha in Sancerre, according to Roumet at the BIVC (2017). The average size amongst the growers sampled in the study's Primary Group is 12.94ha.

<sup>5</sup> Gitton was also the first in the region to use the word 'Silex' on his labels, later made famous by his protégé, Didier Dagueneau, in Pouilly Fumé.

Andrew Jefford (2002) put forward the case for a Sancerre and Pouilly Fumé premier cru tier in his book *The New France*:

*'The appellation situation is unsatisfactory in most regions of France, and the Loire is no exception. [...] Sancerre and Pouilly Fumé, beyond question the most commercially successful of the Loire AOCs, both deserve to have their leading lieux-dits systematically classified into an official Premier Cru system. At present, names like Monts Damnés, Chêne Marchand, or Les Loges are used almost as brands, a practice so evidently untrustworthy that some of those owning plots in these fine parcels actually refuse to pass on this information. A carefully defined Sancerre Premier Cru Les Monts Damnés or Pouilly-Fumé Les Loges would be much more useful to consumers.'* (p.51)

Jean-Robert Pitte, sitting president of the Société de Géographie, writes in the forward to Boulay's book: 'rather than attempting to obtain a specific AOC [for Chavignol], perhaps it would be preferable to decline Sancerre in premiers crus, or even in grands crus' (2017, p.6). Yet despite these arguments, Sancerre remains a single tier appellation and has never made a formal application to the INAO to change that position<sup>6</sup>.

Boulay (2017) has chronicled the use of vineyard names like Les Monts Damnés (*Montdampni*) back to the thirteenth century and Les Culs de Beaujeu (*Clausus*

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<sup>6</sup> Although the village of Chavignol applied for separate appellation status in the 1950s and 1970s; both applications were unsuccessful.

*de Bellojoco*) to the fourteenth, and demonstrates that their use was commonplace by the fifteenth. Today, growers talk about their grandfathers having employed *lieu dit* names, although their usage waned in the late twentieth century (Delaporte, 2017). Benoît Roumet of the BIVC and journalists Jim Budd and Chris Kissack (2016, pers comm.), however, note that single vineyard wines have shown an emphatic resurgence in the past five to ten years, along with a growing trend for ‘terroir wines’, such as ‘Silex’, as a means for Sancerre growers to differentiate their products and add value.

Sancerre growers must all comply with the INAO’s *cahier des charges*, which acts like a manual for all appellations in France, establishing certain limits and requirements for the AOC. It governs everything from viticulture (such as grape varieties, planting density, pruning methods, maximum yields) to vinification and style (such as grape maturity, minimum potential alcohol, ageing requirements). The maximum yield in Sancerre is 65 hectolitres per hectare (hl/ha) for Sauvignon Blanc and 59hl/ha for Pinot Noir (INAO, 2011)<sup>7</sup>.

There are 563 vineyard sites across Sancerre, including the three studied here, that are registered plots recognised by the INAO as *lieux dits cadastrés*. To apply such names on labels, growers should declare that 100% of the fruit comes from the registered plot in the November following the harvest with the local customs bureau<sup>8</sup>. Other than separate vinification and registration for use of the vineyard

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<sup>7</sup> The maximum yield for rosé is 62hl/ha.

<sup>8</sup> Although growers are obliged to make this declaration by the *code rural*, some choose not to, as it is not officially enforced by the INAO.

name, these wines are governed by the same single *cahier des charges* as all Sancerre wines.

### 3.3 Les Monts Damnés, Les Culs de Beaujeu and Chêne Marchand

Amongst experts<sup>9</sup>, opinions differ over which are definitively the most important *lieux dits* in Sancerre. Whilst all agree that Les Monts Damnés (*terres blanches*, 34.8ha<sup>10</sup> across Chavignol and Verdigny) is the preeminent site of Sancerre, there is slight discrepancy surrounding the next tier. Chêne Marchand (*caillottes*) has been selected due to its significant size (27ha), and high standing in the village of Bué, whilst the smaller Les Culs de Beaujeu (*terres blanches*, 11ha, Chavignol) has been selected due to its high reputation amongst growers and journalists, and long history (Boulay, 2017). Experts and growers consistently, if not exclusively, select these three sites as the most important in the appellation. Côte d'Amigny has been excluded from this study, despite its fabled quality, because it is not widely marketed under its *cadastré* name, but famously under 'La Grande Côte' by the Cotats<sup>11</sup>.

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<sup>9</sup> Experts include: Budd, Kelley, Kissak, Prieur, N., and Roumet

<sup>10</sup> Vineyard size information was provided by the Union Viticole Sancerroise (2017).

<sup>11</sup> Other sites of note across the region include Belle Dame, Les Bouffants, Le Clos du Roy, Grand Chemarin, La Moussière, Le Paradis, Les Perrières, Petit Chemarin, La Poussie, and Les Romains, amongst others.

### 3.4 Comparative systems and appellations in flux

To understand Sancerre's situation in a wider context it is useful to draw comparison with other apposite appellations. Classification authority Benjamin Lewin MW identifies Alsace as a particularly apt comparison (2016, pers comm.): a two-tier system (communal and grand cru), single varietal wines<sup>12</sup>, varied soils, and diverse hillside expositions. Burgundy's system of classification is useful to consider to a certain extent; indeed, Budd (2016, pers comm.) believes Sancerre has more in common with its neighbour in terms of ideology than its nominal home of the Loire.

However, Burgundy's four-tier pyramid is too complex a classification system as to make it a practical comparison with Sancerre. Nevertheless, the Mâcon appellation of Pouilly Fuissé does present a pertinent point of comparison, which is itself applying for a two-tier communal and premier cru system<sup>13</sup>. Frédéric-Marc Burrier (2016, pers comm.), president of the Union des Producteurs de Pouilly-Fuissé, insists a major reason that the Mâcon has remained without a tiered system whilst the rest of Burgundy enjoys a complex hierarchical pyramid is down to its not having been occupied by the Germans during the Second World War<sup>14</sup>. He suggests that historical classification may sometimes be down to arbitrary reasons unrelated to wine quality, identity, and diversity, and that

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<sup>12</sup> Blends are permitted for communal wines, but all Alsace grands crus must be made from one of the four permitted single varietals.

<sup>13</sup> Pouilly Fuissé's application process began in 2008. In June 2017 the INAO approved 183ha to be classified as premier cru. The General Assembly of Growers in Pouilly Fuissé will be voting in July whether to accept the INAO's classification.

<sup>14</sup> Occupied regions of Burgundy, including the Chalonnais, Côte D'Or and Chablis, were classified into crus in 1943 as a means of preventing widespread German requisition of communal wines.

today, “Pouilly Fuissé doesn’t want to create anything new, they simply want to be recognised.” Studying its application process to the INAO can inform Sancerre’s potential for application, and the pros and cons of such an action.

Within the Loire, four sites in Muscadet, Quarts de Chaumes Grand Cru and Coteaux du Layon 1er Cru Chaume, broke with long tradition by achieving classified status in 2011<sup>15</sup>. In the Southern Rhône both Rasteau (2010) and Cairanne (2016) have recently made successful applications to the INAO. And in Italy in 2014, Chianti achieved a separate tier for Chianti Classico Gran Selezione. Beaujolais, however, has so far been frustrated in its application for premiers crus (Burrier, 2016, pers comm.), and St Emilion’s regular revisions are illustrative of the complexity of applications to the INAO<sup>16</sup>.

### **3.5 Collective Names**

For wider context, a review of research papers on the function of names, prices, reputations and classification systems in the wine industry was conducted. The wine industry is heterogeneous, and it can be difficult to apply theoretical models across different regions. However, economists like Professor Angelo Zago at the University of Verona (2017, pers comm.) have been working on “theoretical models of collective reputation to investigate the incentives for quality provision for wine producers under different classification systems.” Work in applying

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<sup>15</sup> Final amendments to the Coteaux du Layon 1er Cru Chaume *cahier des charges* were passed in 2014, although growers could use the cru classification from the 2010 vintage onwards (Beauclair, 2017, pers comm.).

<sup>16</sup> The grand cru classification in St Emilion is updated every 10 years, however the 2006 classification was annulled and then partially reinstated, and a revision in 2012 has proved yet still unsatisfactory.

theoretical models to the empirical data of specific regions has been carried out by Landon and Smith (1998) in Bordeaux, and Costanigro, McCluskey, and Goemans (2009) in California.

These papers investigate the choices of labelling strategies when wine names can be individual or collective. This is interesting to consider in the context of Sancerre where individual names (either the individual producer, or a unique wine name) and collective names (multiple growers employing the *lieu dit* names Les Monts Damnés, Les Culs de Beaujeu, or Chêne Marchand for example, or *terroir* names like 'Silex') are employed. The models take into account that consumers have varying levels of knowledge, and Zago *et al.*'s paper argues that 'collective labels can inform unaware consumers about the average quality of the firms joining it', whilst individual brands (the individual producer) are 'effective in informing more knowledgeable consumers about the true quality of the product' (Yu, Bouamra-Mechemache, and Zago, 2016, p.26).

Collective names can therefore benefit a whole spectrum of producers. Those with a weak individual brand will benefit from the spill-over effect of producers with a strong individual brand. And those with a strong brand still see a benefit in using the collective name as a means of reaching the unaware market (*ibid.*).

### 3.6 A note on yield

This paper will use data on yields in order to measure the economy of single vineyard versus traditional Sancerre, as well as in comparison with other appellations. However, this paper recognises Stephen Skelton MW's point that the commonly held view that 'yield is necessarily in inverse proportion to quality' is not exclusively true (2009, p.46), and that a reduction in yield will not directly result in an increase in quality or an uplift in price.

### 3.7 A note on *lieu dit* names

There are discrepancies regarding the names in use on labels of the three *lieux dits* studied in this paper<sup>17</sup>. Those permitted to put 'Les Monts Damnés' or a close alternative on their labels can source fruit from three neighbouring sites across the hillside: Les Monts Damnés, La Côte des Monts Damnés, and Les Montsdamnés. Some choose to name their wines after small, revered parcels within La Côte des Monts Damnés, like La Comtesse and La Néore. These will all be referred to henceforth as 'MD'. Les Culs de Beaujeu, Le Cul de Beaujeu, Clos Beaujeu or Clos de Beaujeu as it variously appears will be 'CB'. And Le Chêne Marchand or Chêne Marchand will be 'CM'.

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<sup>17</sup> This is not unique to Sancerre; alternative spelling of vineyard sites are used in Burgundy as well, for example, Mazis Chambertin / Mazy Chambertin.

### 3.7.1 Other terminology

The study's reference to 'terroir wines' is aimed at identifying growers who use the name of soils on their labels, like 'Silex', 'Caillottes' or 'Terres Blanches', earlier mentioned as a trend noticed by regional experts (section 3.2).

'Traditional Sancerre' refers to wines that usually come from a blend of parcels and *terroir* types, and are marketed simply as AOC Sancerre.

'Ex-cellars' price refers to the professional cellar-door price per 75cl bottle, exclusive of value added tax.

## 4. METHODOLOGY

A quantitative questionnaire and semi-structured interview were put to growers with holdings in MD, CB and CM. The questionnaire's function was to measure dates, prices, yields, and frequency of single vineyard wines; identify other trends; and to gauge appetite for a cru classification system. The semi-structured interview was used to expand on these areas.

Via consultation with the BIVC, the Union Viticole Sancerroise (UVS), and leading producers in the region a list of growers across the three *lieux dits* was compiled, numbering 59 in total<sup>18</sup>.

Historical context, personal opinions, and regional sentiment have been taken into account to inform the introduction and conclusions of this paper. However, the results and analyses have been based on the quantitative data gathered via questionnaires completed by the participating producers, supported by qualitative results from the semi-structured interviews.

### 4.1 Research population

#### 4.1.1 Producers

The research population was divided into two categories. The 'Primary Group' of producers comprised those who own vines in the three *lieux dits* studied here<sup>19</sup>. This included: producers who grow, harvest, vinify, and market MD, CB and/or CM wines separately; producers who own vines and blend fruit from these sites

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<sup>18</sup> See section 7.4 for further information.

<sup>19</sup> See Appendix 9.2 for a list of participants in the Primary Group.

into their traditional Sancerre wines; and producers who sell the fruit/juice/wine from these sites to *négociants*. The entire population was approached to take part in the study. The results and analyses are based on the data sourced from this group.

The 'Secondary Group' was a sample group made up of other producers in Sancerre. A small number of producers that were suggested by members of the Primary Group as having a special interest in the debate over cru classification, from both sides, were interviewed in person in Sancerre. This included those with a large number and long history of single vineyard wines, like Vacheron and Gitton Père et Fils, as well as those with none at all, like André Dezat. It also included the appellation's largest producer and its only co-operative, the Cave Co-operative des Vins de Sancerre, which represents 90 growers and 9% of the appellation's surface.

#### **4.1.2 Vintages**

Whilst Sancerre white wines can be released onto the market in the January following the harvest (or February in the case of a late harvest), many growers will release single vineyard wines and prestige *cuvées* much later. At the time of interviewing, not all growers had released 2015 prices for all their wines, so the most recent vintage included in the study was 2014. To give a comprehensive view of recent trends, data on pricing was taken from the five vintages up to and including 2014. Fortunately for Sancerre, the region did not experience any extreme adverse weather conditions causing a significant reduction in yield

between 2010 and 2014<sup>20</sup>. Therefore, the data from these vintages presents an even snapshot of the region.

## **4.2 Research method: quantitative questionnaire and semi-structured interview**

### **4.2.1 The Primary Group**

A quantitative questionnaire was devised (see Appendix 9.3), which was piloted with three growers, and refined for ease of use and clarity. Over the period of two weeks this questionnaire was put to all participating growers in the Primary Group. Producers were emailed the questionnaire ahead of their scheduled interview. They could complete the form and return it by email ahead of the meeting, however most chose to answer the questionnaire at the time of the interview.

As far as possible all questions in the questionnaire were designed to extract quantitative answers that could be analysed in their own right and compared with other appellations.

Semi-structured interviews were carried out with all participating growers after completion of the questionnaire. These interviews were used to generate qualitative insights to supplement the quantitative findings, and as a space to probe the final question (Q21), 'Do you think that Sancerre could benefit from a cru system?' This gave the opportunity to reflect on the strengths and

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<sup>20</sup> The region experienced hailstorms in 2009 that caused a reduction in yield. There were some isolated incidents of hail in 2011, though damage was not widespread.

weaknesses of the current system, and the potential advantages and disadvantages of implementing a cru classification system.

The interview was also used to determine any trends in viticultural or vinification practices between traditional Sancerre and single vineyard wines, so that a more complete picture could be drawn to support the statistical evidence gathered via the questionnaire.

One producer makes a red CB and one has Pinot Noir vines on MD currently in production, although no separate *cuvée* is made. Therefore, red wine prices and yields were included in the questionnaire for transparency, although the results they yield concerning single vineyard wines are not statistically significant.

Some producers in the Primary Group make wines in other appellations (Pouilly Fumé, Quincy, and Menetou-Salon, for example). Only data relating to Sancerre was gathered by the questionnaire.

#### **4.2.2 The Secondary Group**

A shorter questionnaire (see Appendix 9.4) was also put to a sample of growers who fell outside the criteria of the Primary Group. That is, those who do not have holdings in MD, CB or CM. 9 producers, including the co-operative, answered the questionnaire and took part in a semi-structured interview in Sancerre during the data gathering trips undertaken for the Primary Group. As a follow-up step, all those Sancerre producers whose email address is listed on the BIVC's website

were contacted. These two efforts combined yielded a sample size of 13 responses.

This supplementary questionnaire was used to gather data about other single vineyard wines and 'terroir wine' frequency. Due to the small sample size, the results are not statistically significant. However, it was used to add further insight and to check if the results from the Primary Group were consistent with trends in the wider appellation.

### **4.3 Comparison with other appellations**

Regional bodies of various apposite appellations – either due to structure or recent changes in classification – were contacted for information regarding export prices and yields, to provide a context within which to place the Sancerre results.

The data was standardised so that appellations could be compared through the euros per hectare that growers can potentially realise, taking into account the average price per bottle for each tier of classification and any yield restrictions their *cahier des charges* might impose. The economic uplift that growers in Sancerre are realising in their single vineyard wines could then be set in a wider context.

A review of the other restrictions that classification systems enforce was done, so that factors like banning herbicides, hand harvesting obligations, minimum ageing requirements, and so on were considered as part of the analysis and conclusion, explored in sections 6.2.3 and 7.3.



## 5. RESULTS

Conscious of the limited data pool, every effort was made to speak to all growers eligible for the study. In order to achieve a 95% confidence level with a 5% margin of error, 51 of the 59 producers in the Primary Group were needed to participate (Survey System, n.d.). 53 of 59 producers took part in the study, which represents 89.8% of the Primary Group's population<sup>21</sup>. All 53 answered the questionnaire and were interviewed. Whilst these participants account for 16% of the total producers in operation in Sancerre (330<sup>22</sup>), the total number of hectares owned by respondents represents 26% of the appellation (769.38 ha).

Furthermore, a sample group of 13 growers, including the co-operative, who do not produce MD, CB or CM were also canvassed (the Secondary Group). These responses account for 102 of the region's growers (31% of the appellation's population), and 517.5 ha (17.5% of the appellation by surface area). In total that means that the study reached 47% of the appellation's population of producers accounting for 43% of holdings.

Not all growers in the Primary Group bottle their MD, CB or CM separately. Section 5.4 shows the recent increase in the numbers bottling and marketing these wines separately. A significant number either blend wines from these *lieux dits* into their traditional Sancerre blanc or sell their grapes/juice/wine to *négociants*, and therefore could provide data on yields but not ex-cellars prices. Some of the results are therefore based on the whole group of 53 producers

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<sup>21</sup> See Appendix 9.2 for a list of participants in the Primary Group.

<sup>22</sup> The BIVC (2016) states: 308 winemakers, 21 wine-merchant producers, 1 co-operative.

(‘Primary Group, whole group’). Other results are based on the 42 producers who market a MD, CB, and/or CM<sup>23</sup> (‘Primary Group, ex-cellars sub-group’).

Table 1 gives an overview of the number of respondents across the three single vineyards.

*Table 1: Number of respondents in the Primary Group (whole group)*

<b>Vineyard</b>	<b>Number of respondents</b>	<b>Number who bottle and market this single vineyard (as at 2014)</b>
<b>MD</b>	32	17
<b>CB</b>	11	6
<b>CM</b>	23	20

The number of respondents cited in Table 1 (32 + 11 + 23) does not equal 53.

This is because some growers have holdings across two or all three of the sites, as shown in Table 2.

*Table 2: Distribution of respondents in the Primary Group (whole group) with holdings in MD, CB and CM*

<b>Vineyard</b>	<b>Number of respondents</b>
<b>MD only</b>	21
<b>CB only</b>	1
<b>CM only</b>	19
<b>MD + CB</b>	8
<b>MD + CM</b>	2
<b>CB + CM</b>	1
<b>MD + CB + CM</b>	1
<b>Total</b>	53

<sup>23</sup> 41 sell these wines on the export market; 1 sells domestically only. Of the 41 respondents with ex-cellars prices, two did not disclose details of prices across all five vintages.

Most producers make a traditional Sancerre blanc, however a few with very small domaines, or ones based in other appellations who only have a small parcel of vines in the Sancerre appellation, do not market a traditional Sancerre blanc. Out of 53, 40 respondents make and market a traditional Sancerre blanc.

## 5.1 Ex-cellars prices per bottle

The results from the questionnaire show the economic uplift between traditional Sancerre blanc and single vineyards wines, as well as the rate of their increase across five vintages. The figures for red wine have also been reported for balance<sup>24</sup>.

### 5.1.1 The Economic Uplift

*Table 3: The economic uplift per bottle (ex-cellars) between traditional Sancerre blanc and the single vineyards, 2014 vintage (Primary Group, ex-cellars subgroup)*

	€/bt ex-cellars price	% €/bt increase on traditional Sancerre blanc
<b>Traditional Sancerre blanc 2014</b>	€ 6.90	
<b>MD 2014</b>	€ 11.91	73%
<b>CB 2014</b>	€ 13.43	95%
<b>CM 2014</b>	€ 10.95	59%

All the single vineyards show significant uplift in their ex-cellars price per bottle in comparison with traditional Sancerre blanc, with CB selling at almost double that of traditional Sancerre blanc.

### 5.1.2 Growth over five vintages

<sup>24</sup> Roughly 19% of Sancerre's production is red or rosé (BIVC, 2016).

*Table 4: Traditional Sancerre blanc versus single vineyard ex-cellars price per bottle 2010 – 2014 (Primary Group, ex-cellars sub-group)*

	Average €/bt ex-cellars price: traditional Sancerre blanc		Average €/bt ex-cellars price: single vineyards (MD/CB/CM average) Sancerre blanc	
	€/bt	Year-on-year increase	€/bt	Year-on-year increase
<b>2010</b>	€ 6.29		€ 10.19	
<b>2011</b>	€ 6.39	2%	€ 10.71	5%
<b>2012</b>	€ 6.55	2%	€ 10.86	1%
<b>2013</b>	€ 6.67	2%	€ 11.34	4%
<b>2014</b>	€ 6.90	4%	€ 11.65	3%
<b>Percentage increase between 2010 and 2014</b>		10%		14%

Table 4 shows results for average ex-cellars pricing across five vintages. There is a small but significant advantage in terms of price elevation year-on-year in the single vineyard wines over traditional Sancerre blanc, which grew at a rate of 14% compared to 10% over the five vintages.

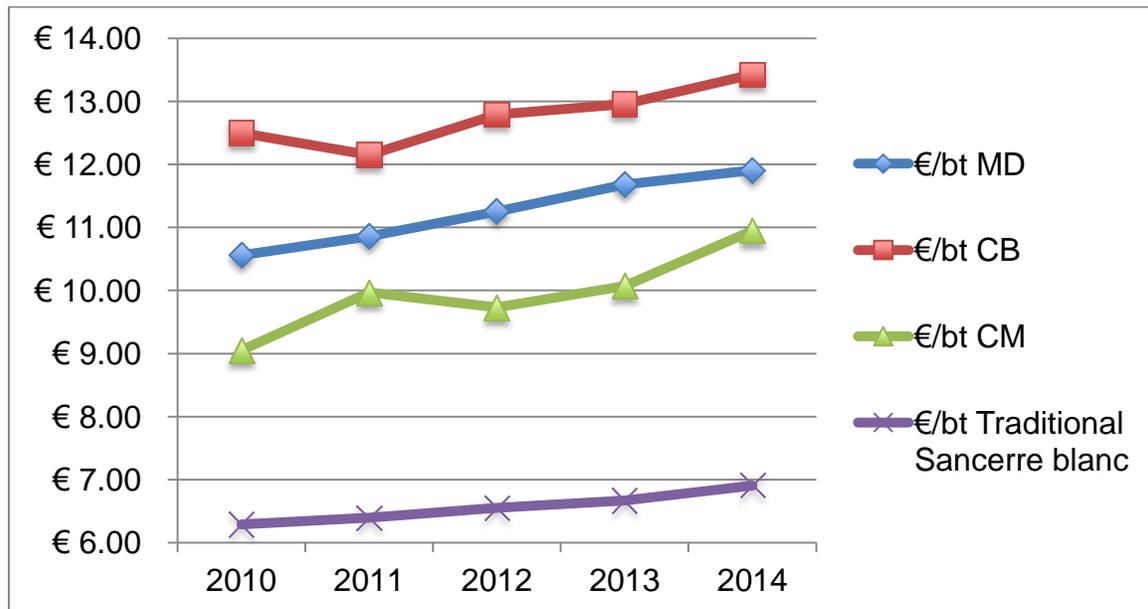
Table 5 shows growth patterns across traditional Sancerre rouge, which has increased at the same rate as traditional Sancerre blanc (10% between 2010 and 2014).

*Table 5: Traditional Sancerre blanc versus rouge ex-cellars prices per bottle 2010 – 2014 (Primary Group, ex-cellars sub-group)*

	<b>Average €/ bt: traditional Sancerre blanc</b>	<b>Year-on- year increase</b>	<b>Average €/ bt: traditional Sancerre rouge</b>	<b>Year-on- year increase</b>
<b>2010</b>	€ 6.29		€ 6.52	
<b>2011</b>	€ 6.39	2%	€ 6.66	2%
<b>2012</b>	€ 6.55	2%	€ 6.88	3%
<b>2013</b>	€ 6.67	2%	€ 7.06	3%
<b>2014</b>	€ 6.90	4%	€ 7.18	2%
<b>Percentage increase between 2010 and 2014</b>		10%		10%

Whilst Table 4's data is based on the average across all three single vineyards in the study, Figure 1 shows the clear difference between the three sites:

*Figure 1: Euros per bottle ex-cellars price for MD, CB, CM, and traditional Sancerre blanc (Primary Group, ex-cellars sub-group)*



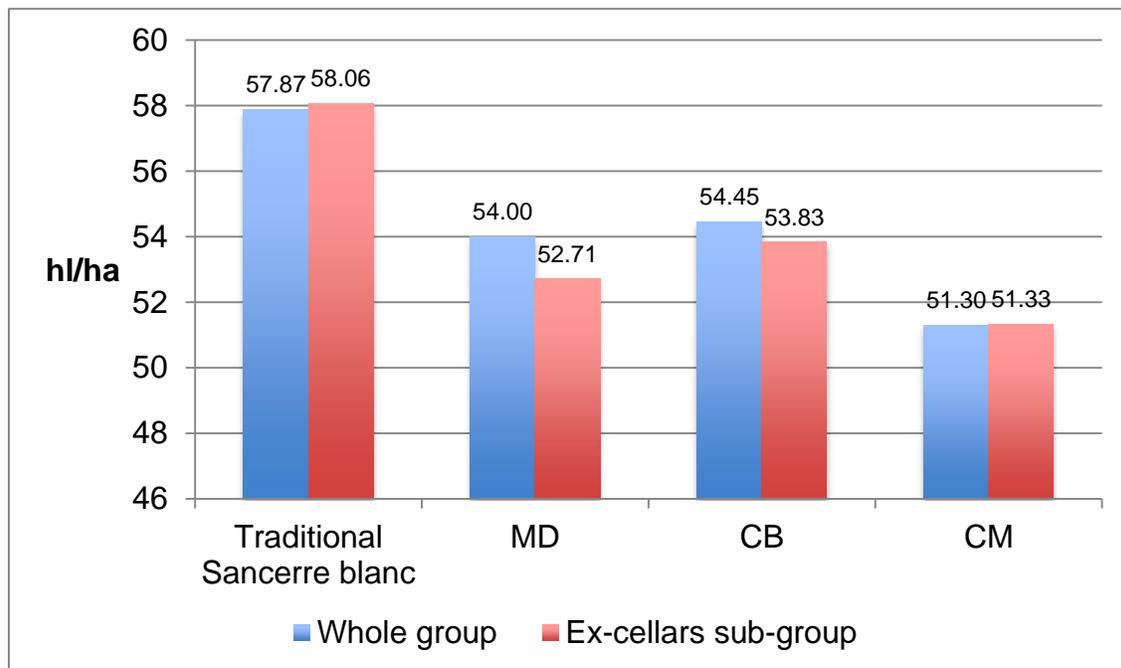
Of the three single vineyards, MD has the most uniform increase: it has the largest surface (34.8ha) and until the 2014 vintage, the highest number of respondents who bottle and market the wine (17). Its increase closely mirrors that of the Primary Group's traditional Sancerre blanc's steady growth pattern. CB and CM both also show an upward trend, however with some volatility. This can be explained in the case of CB by the small number of respondents (5 who bottle and market a white wine<sup>25</sup>), the least expensive of whom did not release a wine in 2010. And in the case of CM, by the high rate of growers beginning to

<sup>25</sup> The results of the red wine from this site have been excluded, as explained in section 4.2.1.

market the wine for the first time with the 2012 vintage onwards, which brought the average price down (see section 5.4 on dates of first vintages).

## 5.2 Yield

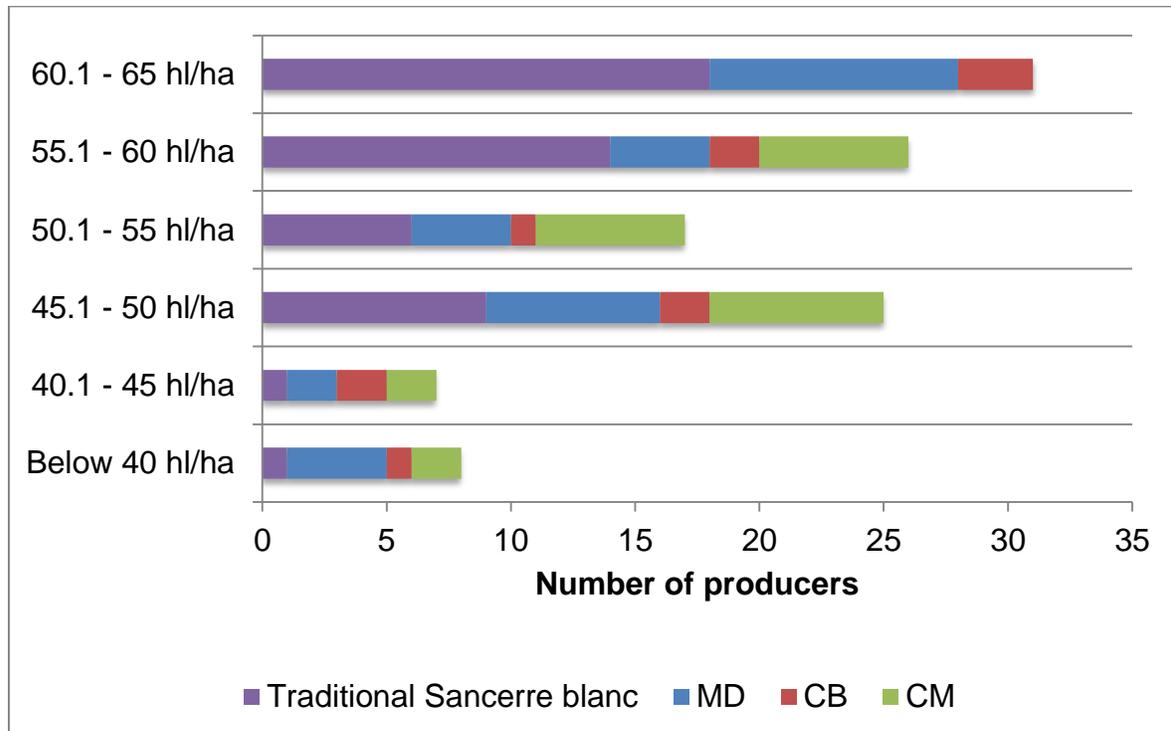
Figure 2: Average yield (hectolitres per hectare) between 2010 and 2014 (Primary Group)



The maximum yield for Sancerre blanc is 65h/ha. This graph shows that growers in the Primary Group (whole group) harvest at 11% below the maximum yield for their traditional Sancerre blanc. Average yields across MD, CB, and CM are down 17%, 16%, and 21% respectively. Results of the export sub-group have also been shown, as these figures will be used later on (in section 5.3).

Figure 3 below shows how the Primary Group breaks down into yield bands across traditional Sancerre blanc and the three single vineyards across five vintages.

*Figure 3: Average yield bands within the Primary Group (whole group) between 2010 and 2014*



The largest band is the 60.1 – 65hl/ha. Within this top band 18 respondents said they picked their traditional Sancerre blanc above 60hl/ha; 10 respondents in MD; and 3 in CB. However no respondents in CM picked at above 60hl/ha.

### 5.3 Euros per hectare

By converting the average ex-cellars price per bottle of the 2014 vintage in the Primary Group ex-cellars sub-group into a euros per litre value, and putting this against the average yield (hectolitres) per hectare, we are able to see the true uplift in price that growers are achieving in these single vineyard wines in terms of euros per hectare.

$$(\text{hl/ha} \times 100) \times (\text{bottle price}/0.75) = \text{euros per hectare}$$

*Table 6: Realised euros per hectare (2014 vintage) (Primary Group, ex-cellars sub-group)*

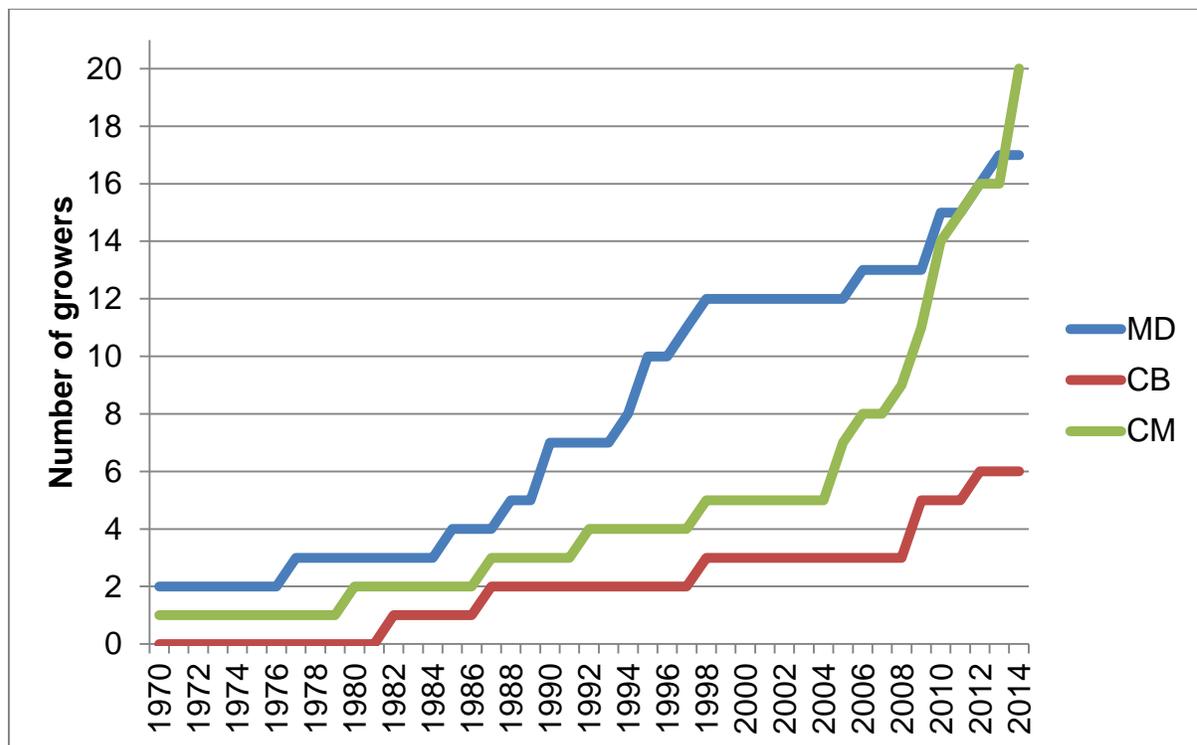
	<b>Average hl/ha</b>	<b>Average €/bt 2014</b>	<b>Average €/litre 2014</b>	<b>Realised €/ha 2014</b>	<b>% € increase on traditional Sancerre blanc per hectare</b>
<b>Traditional Sancerre blanc</b>	58.06	€ 6.90	€ 9.20	€ 53,415.20	
<b>MD</b>	52.71	€ 11.91	€ 15.88	€ 83,703.48	57%
<b>CB</b>	53.83	€ 13.43	€ 17.91	€ 96,409.53	80%
<b>CM</b>	51.33	€ 10.95	€ 14.60	€ 74,941.80	40%

All three single vineyards display a significant economic uplift. Due to its lower average yield (51.33hl/ha) and lower average ex-cellars price per bottle (€10.95 in 2014) CM has realised the smallest economic uplift at 40%, whilst CB enjoyed the highest at 80%.

## 5.4 Date of single vineyard bottling

The results show there is a clear economic benefit in bottling these three single vineyard wines separately, so it is no surprise that their frequency is increasing.

Figure 4: Number of producers marketing each single vineyard wine for the first time (Primary Group, whole group)



Marcel Gitton was the first grower to bottle single vineyard wines in Sancerre (from 1958, in the village of Ménétréol) (Gitton, P., 2017, pers comm.). Amongst the Primary Group there are three growers (2 in MD and 1 in CM) who say they have bottled these single vineyard wines since before they can remember. These three have been given an assumed start date of pre-1970.

What is striking here is the steep upturn in the number of producers bottling CM, which has jumped from five in 2004 to 20 in 2014. The president of the Sancerre

Growers' Syndicate, Gilles Guillerault, explained that in the late 1980s and early 1990s some "indelicate growers" were producing two or three times more than their holdings accounted for in CM (2017, pers comm.). In an act of self-regulation the Growers' Syndicate in Bué temporarily banned the use of the name 'Chêne Marchand' on labels<sup>26</sup>. A subsequent relaxation in the ban has contributed to the sudden upturn in frequency. CM even over-took MD in 2014 (17 in MD, 20 in CM by 2014) despite its smaller size (27ha).

## 5.5 Other trends

*Table 7: Number of producers and types of wine within the Primary Group (whole group)*

	Number of producers
<b>Whole Group</b>	53
<b>Ex-cellars sub-group</b>	42
<b>Bottling 3 traditional Sancerres</b>	37
<b>Bottling MD/CB/CM</b>	39
<b>Bottling other <i>lieux dits</i></b>	21
<b>Bottling 'terroir wines'</b>	15

As explained at the beginning of section 5, not all 53 participating producers bottle and market the wines themselves. 11 sell their grapes/juice/wine to *négociants*. Of the 42 producers who do bottle and market their wines (the Primary Group, ex-cellars sub-group), 37 produce three traditional Sancerres (red, white, and rosé), whilst 39 bottle single vineyard wines and 15 bottle 'terroir wines'.

<sup>26</sup> Some of those who had previously bottled this vineyard continued to do so during the ban by rebranding their *cuvées* with names such as 'Cuvée C.M.'.

Table 8 shows the number of wines marketed by the ex-cellars sub-group.

*Table 8: Number of wines per producer within the Primary Group (ex-cellars sub-group)*

<b>The ex-cellars sub-group</b>	<b>Number of wines per producer</b>
<b>Mean average</b>	6.49
<b>Fewest</b>	1
<b>Most</b>	15
<b>Mode average</b>	6

The mean average number of AOC Sancerre wines per producer in the Primary Group ex-cellars sub-group is 6.49 wines. The vast majority (37 producers) bottle three traditional Sancerres (white, red, and rosé). The remaining 3.49 average is made up of other single vineyard wines, prestige *cuvées* and ‘terroir wines’. The fewest number of wines made by one producer is 1, and the highest is 15. The mode average is 6.

Twenty-one of the respondents in the Primary Group named *lieux dits cadastrés* other than MD, CB or CM that they bottle separately. Across the 42 producers in the Primary Group who bottle and market wines themselves, there are 81 single vineyard wines coming from 30 individual *lieux dits*.

### 5.5.1 'Terroir wines'

As established in section 2.2, experts have commented on the use of *terroir* names, like 'Silex', on labels of Sancerre wines.

*Table 9: Percentage of producers applying 'terroir wine' names in the Primary Group*

	Number of producers	Percentage of producers
<b>Whole group</b>	15 out of 53	28%
<b>Ex-cellars sub-group</b>	15 out of 42	36%

The 15 producers choosing to apply 'terroir wine' names to their *cuvées* accounts for 28% of producers in the Primary Group (whole group), which rises to 36% amongst the ex-cellars sub-group. The most common name is 'Silex' with 10, followed by 'Caillottes' with 3, and 'Terres Blanches' with 2.

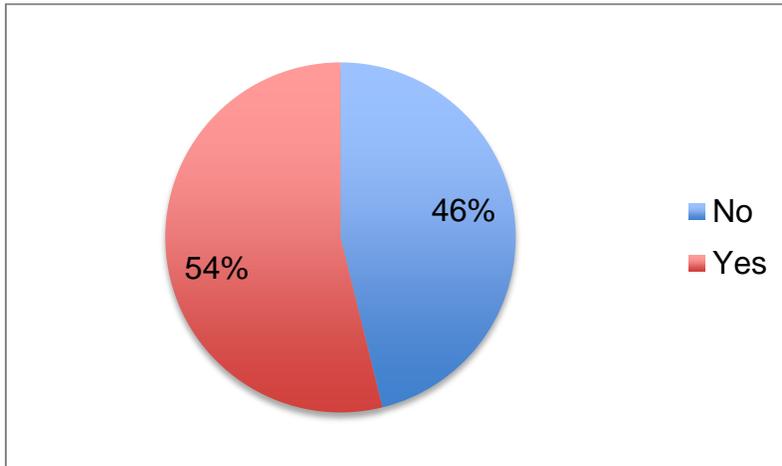
### 5.6 Sentiment for and against a cru classification system

The final question, 'Do you think that Sancerre could benefit from a cru classification system?' (Q21), was purposefully theoretical in tone. The Sancerre Growers' Syndicate has debated this issue in the past, and the Prospective Commission is currently discussing the future of Sancerre with regards to amending regulations around the use of *lieux dits*. This question was used to gauge the general attitude regarding a change in Sancerre.

Since the appellation has never initiated a formal application, one might expect that sentiment would be generally against introducing a new system, and in

favour of the *status quo*. But those answering yes to the theoretical question were slightly in the majority (54%).

Figure 5: Q21: 'Do you think that Sancerre could benefit from a cru classification system?' (Q21) answers (Primary Group, whole group)



Whilst the question was a straightforward yes/no answer so that opinions could be measured in a statistical manner, the question was designed to lead on to the semi-structured interview, where interviewees could elaborate on the reasons for their answer.

Some who had answered no said that they would be in favour of a system which better segmented and regulated *lieux dits* from general Sancerre, even whilst they were against a hierarchical cru system. Some cited Chablis as an appellation that had de-valued its communal AOC wine by elevating its premiers and grands crus; they worried Sancerre would inevitably create a 'Petit Sancerre' should certain sites be elevated to cru status. And some, such as Sonia Bailly, like the flexibility of the system as it is and see no need to change it. However, the major objection to a cru classification system was its potential to disrupt local

solidarity and co-operation amongst growers that exists in the small cohesive appellation.

Those who answered yes saw it as a means to both protect and quantify the quality of the best sites. Some of these included people who pointed out that as an abstract idea, yes, it could benefit, but that the opportunity may have passed. Gilles Crochet (2017) suggested the time of his grandfather in the 1950s (around the time of Pierre Bréjoux's work) would have been a good moment. Others echoed this view, like Thierry Merlin (2017), who said that certainly Sancerre "merits a cru classification system, but practically, it would be too complicated to implement now".

## **5.7 The Secondary Group**

Whilst this group is too small a sample to draw conclusions from, the results they present generally supported the data found amongst the Primary Group.

9 of the 13 respondents said they bottled single vineyard wines (69%). 4 of the 13 said they bottled 'terroir wines' (31%). However, sentiment against a cru classification system was slightly higher in the Secondary Group, 8 of whom responded no to Q21 (62%).



## 6. ANALYSIS

### 6.1 Within the context of Sancerre

Before comparing the study's results with other appellations, they can be held against the BIVC's figures for bulk wine prices in Sancerre. These are a reliable indication of the wider price trend in the appellation. Tables 4 and 5 in section 5.1.2 showed that the Primary Group's traditional Sancerre blanc, rouge, and single vineyard wines all showed a steady increase in price across five vintages (2010 – 2014). Table 10 shows a repeat of this growth trend in the bulk price for Sancerre blanc, although it is more marked here (27% increase between 2010 and 2014), showing that overall demand for communal wines is the strongest. But volatility shown in the decrease between 2010 and 2011 also reveals it is more vulnerable to external influences on the market, which may occasionally result in a downward trend in price.

*Table 10: Bulk Sancerre blanc prices supplied by the BIVC (2017)*

	€/litre	Year on year increase
<b>2010</b>	€ 4.49	
<b>2011</b>	€ 4.43	-1%
<b>2012</b>	€ 4.56	3%
<b>2013</b>	€ 5.05	11%
<b>2014</b>	€ 5.68	12%
<b>Percentage increase between 2010 and 2014</b>		27%

Grower-*négociants* will pay a premium for single vineyards like MD, with a stable mark up of €0.30 per litre above the price of traditional Sancerre blanc when bought in bulk (Godon, 2017). Therefore, those selling grapes from prestigious single vineyard sites stand to see the biggest gains but also run a greater risk of price decreases than those bottling and marketing these wines.

## **6.2 Comparison with other appellations**

Analysis of the results from the questionnaire and comparison with other appellations can show whether Sancerre has already achieved the economic benefit of a *de facto* cru classification system, and whether it could be suitable for a cru classification system. Furthermore, by considering the benefits and drawbacks that other recently reclassified appellations have experienced, it can show whether Sancerre could benefit from a classification system, revealing in the processes whether the response generated by the Primary Group to Q21 is supported by the evidence (54% believing Sancerre could benefit).

### **6.2.1 Price and yield**

The data yielded by the Primary Group questionnaires can be compared directly with other appellations that have cru classification systems. There are two methods of comparison: price per bottle, and the potential euro value generated per hectare.

Alsace is a useful comparison to make, since it has two tiers of classification: AOC and grand cru. Alsace has had a grand cru tier since 1975, although it was

not until 2011 that each of the 51 classified *lieux dits* were recognised as discrete grands crus. Table 11 compares prices per bottle.

*Table 11: Comparison between Alsace and Sancerre average export euros per bottle price*

	Average export price €/bt	Average uplift in €/bt price
<b>Alsace AOC<sup>27</sup></b>	€ 4.05	
<b>Alsace Grand Cru<sup>28</sup></b>	€ 6.94	71%
<b>Traditional Sancerre blanc 2014</b>	€ 6.90	
<b>MD 2014</b>	€ 11.91	73%
<b>CB 2014</b>	€ 13.34	93%
<b>CM 2014</b>	€ 10.95	59%
<b>MD/CB/CM 2014 average</b>	€ 11.65	69%

Table 9 shows that Sancerre is already achieving in MD and CB at least what Alsace achieves in its grands crus in terms of economic uplift per bottle, and whilst CM is achieving slightly less, the average uplift of all three single vineyards is almost the same as Alsace (69% to 71%).

Whilst percentages are useful to compare, they are not the whole story. The scale of the value should also be considered. In the case of Alsace, Olivier Humbrecht MW points out that, “71% more than a very low price is not necessarily a very satisfactory result. The gap between €4.05 and €6.94 doesn’t leave that much room for *Lieu-dit* Alsace, Village and 1er Cru...” as growers in this appellation are lobbying for (2016, pers comm.). In the case of Sancerre the

<sup>27</sup> Data supplied by the Conseil Interprofessionnel des Vins d’Alsace (CIVA) (2016) in € per litre, converted into € per bottle. The data supplied related to December 2015, rather than a specific vintage.

<sup>28</sup> This data excludes Vendanges Tardives and Sélection de Grains Nobles wines.

prices are significantly higher than Alsace, with the communal wine's average price almost matching that of Alsace's grand cru.

Data on average yields in Alsace was not gathered as part of this research paper. However, comparison with Sancerre can be based on maximum yields. This reveals how crucial yield restrictions imposed by classification systems can be. Table 12 shows the maximum yield comparison between Alsace and Sancerre, Table 13 details some other comparable appellations, and Table 14 mocks-up potential restrictions for Sancerre.

*Table 12: Potential euros per hectare Alsace versus Sancerre (Primary Group, ex-cellars sub-group) at maximum yields*

	<b>Max yield hl/ha</b>	<b>Export €/litre</b>	<b>Potential €/ha</b>	<b>Uplift in €/ha</b>
<b>Alsace AOC</b>	80	€ 5.40	€ 43,200.00	
<b>Alsace Grand Cru<sup>29</sup></b>	55	€ 9.25	€ 50,875.00	18%
<b>Traditional Sancerre blanc 2014</b>	65	€ 9.20	€ 59,800.00	
<b>MD 2014</b>	65	€ 15.88	€ 103,220.00	73%
<b>CB 2014</b>	65	€ 17.79	€ 115,613.33	93%
<b>CM 2014</b>	65	€ 14.60	€ 94,900.00	59%
<b>MD/CB/CM 2014 average</b>	65	€ 15.53	€ 100,966.67	69%

Whilst percentage uplift per bottle was comparable between Alsace and Sancerre, Table 12 shows that by taking maximum yields into account, uplift in euros per hectare paints a very different picture. At maximum yields of 65hl/ha, the Sancerre single vineyards of MD, CB, and CM can potentially achieve 69%

<sup>29</sup> In fact, 2 of the 51 Alsace grands crus (Rangen and Altenberg) have a maximum yield of 50hl/ha. The data is based on the other 49 grand cru sites.

more per hectare than traditional Sancerre blanc without classification, in comparison with the Alsace grands crus' more modest 18% uplift with classification. This shows that Sancerre already enjoys the economic benefit of a *de facto* system that exceeds that of classified Alsace.

However, Alsace AOC does have a high maximum yield, and the difference between AOC and grand cru (a 31% reduction) is greater than in other appellations. A consistent theme amongst recent classification changes has been the application of a reduced yield for crus in their *cahiers des charges*. Table 13 gives a few examples.

Quarts de Chaumes Grand Cru was reclassified in 2011, as was Coteaux du Layon 1er Cru Chaume (although its *cahier des charges* was not officially finalised until 2014 (Beauclair, 2017, pers comm.)); Cairanne in the Southern Rhône was upgraded to a cru in 2016; Pouilly Fuissé is in the process of an application with the INAO; and Chablis has been quoted for context.

Table 13: Yield restrictions in other comparable appellations<sup>30</sup>

Appellation	Max yield hl/ha	% reduction in maximum yield
Alsace AOC	80	
Alsace Grand Cru	55	31%
Quarts de Chaumes AOC (pre 2011)	25	
Quarts de Chaumes Grand Cru (post 2011)	20	20%
Coteaux du Layon AOC <sup>31</sup>	35	
Coteaux du Layon 1er Cru Chaume (post 2014)	25	29%
Cairanne AOC (pre 2016)	41	
Cairanne (Cru) AOC (post 2016)	38	7%
Pouilly Fuissé AOC	60	
Pouilly Fuissé 1er Cru <sup>32</sup>	56	7%
Chablis AOC	60	
Chablis 1er Cru	58	3%

By using the Primary Group ex-cellars sub-group's average euros per litre price for traditional Sancerre blanc 2014 (€9.20/l) for Sancerre AOC, and the average MD/CB/CM 2014 euros per litre price (€15.53/l) for 'Sancerre Cru' we can examine what potential yield restriction might do to economic yield per hectare.

If the same restriction as Alsace were imposed (a 31% reduction in yield between cru and AOC) the limit for 'Sancerre Cru' could be as low as 45hl/ha. We have already seen in in Figure 2 (section 5.2) that average yields in the single

<sup>30</sup> The data on maximum yields was provided by: Conseil Interprofessionnel des Vins d'Alsace (CIVA) (2016); Fédération Viticole Anjou Saumur (FVAS) (2017); Syndicat des Vignerons de Cairanne (2017); Union des Producteurs de Pouilly-Fuissé (2017); and the Chablis INAO *cahier des charges* (2011).

<sup>31</sup> Only 56ha of 1,450ha of Coteaux du Layon were classified as premier cru (Beauclair, 2017, pers comm.).

<sup>32</sup> This was approved by the INAO in June 2017, and will be voted upon by the General Assembly of Growers in the appellation in July.

vineyards are lower than in traditional Sancerre blanc amongst the Primary Group, so a small restriction could be assimilable. Table 14 mocks-up various scenarios.

*Table 14: Imagined yield restrictions applied to 'Sancerre Cru' using data from 2014*

	<b>Maximum yield hl/ha</b>	<b>% reduction in maximum yield</b>	<b>Ex-cellars €/litre</b>	<b>Potential €/ha</b>	<b>% €/ha increase on Sancerre AOC</b>
<b>Sancerre AOC</b>	65		€ 9.20	€ 59,800.00	
<b>Sancerre Cru</b>	65	0%	€ 15.53	€ 100,945.00	69%
<b>Sancerre Cru</b>	63	3%	€ 15.53	€ 97,839.00	64%
<b>Sancerre Cru</b>	62	5%	€ 15.53	€ 96,286.00	61%
<b>Sancerre Cru</b>	60	8%	€ 15.53	€ 93,180.00	56%
<b>Sancerre Cru</b>	58.5	10%	€ 15.53	€ 90,850.50	52%
<b>Sancerre Cru</b>	57	12%	€ 15.53	€ 88,521.00	48%
<b>Sancerre Cru</b>	55	15%	€ 15.53	€ 85,415.00	43%
<b>Sancerre Cru</b>	50	23%	€ 15.53	€ 77,650.00	30%
<b>Sancerre Cru</b>	45	31%	€ 15.53	€ 69,885.00	17%

At the same proportional reduction in yield as Alsace (31% at 45hl/ha), Sancerre would see an equally weakened economic uplift per hectare for cru (just 17%). However, at the more realistic reduction in yield of between 3% and 10% in line with appellations like Chablis, Pouilly Fuissé, and Cairanne, a 64% to 52% uplift in euros per hectare is still achievable.

### 6.2.2 Price elevation after classification

Each application to the INAO will be unique, so it is impossible to apply the experiences of another region to Sancerre in isolation. However, their different experiences can show potential outcomes for Sancerre.

One of the criteria that applications like Pouilly Fuissé must satisfy for the INAO is to show that there is an established price uplift between communal and potential cru sites of 25% (Burrier, 2016, pers comm.). In this context, the three sites of MD, CB, and CM have more than satisfied this criterion.

Burrier does not expect classification to have a significant impact on the price of Pouilly Fuissé 1er Cru (2016, pers com.). However, if we look at the case of Quarts de Chaumes, Beauclair of the Fédération Viticole Anjou Saumur says that since reclassification as grand cru the appellation has seen a 35% increase in domestic retail prices. The average price per bottle in French retail shops for Quarts de Chaumes in 2011 was €16; by 2016 it had risen to €21-22 (2017, pers comm.). She says this is down to a combination of the natural increase in year-on-year prices (as we have seen is also the case in Sancerre), as well as the boost from classification. The words 'grand cru' have added value beyond the natural inflation of prices seen in the years leading up to classification, and support Zago *et al's* work on collective names and the spill-over effect of a collective name like 'grand cru' (Yu, Bouamra-Mechemache, and Zago, 2016, p.26).

However, if we apply the formula laid out in section 5.3 to determine the euros per hectare difference between before and after classification in Quarts de Chaumes, we can see that:

- 2011 potential yield €/ha at 25hl/ha = €53,333 (before grand cru classification)
- 2016 potential yield €/ha at 20hl/ha = €57,333 (five years after grand cru classification)

This is a 7.5% uplift in potential euros per hectare (in terms of retail price). So the 20% reduction in maximum yields has significantly reduced the apparent 35% economic uplift seen in the bottle price five years after the classification.

But measuring economic uplift through the prism of maximum yields is limited, particularly in the case of an appellation like Quarts de Chaumes. This sweet botrytised Chenin Blanc is a naturally low yielding style. Budd reports on his blog that average yields in Quarts de Chaumes between 2000 and 2010 were just 15.56hl/ha (2013). A reduction in the maximum yield on the appellation's *cahier des charge* is therefore less a restrictive measure to raise quality, and more a reflection of the already existing low yields and high quality practiced in the appellation. A similar example can be found in Cairanne, where maximum yields have been reduced from 41 to 38hl/ha, although Denis Alary, president of the Syndicat des Vignerons de Cairanne, explains average yields were already around 35hl/ha (2017, pers comm.).

The same could be said for Sancerre: if we take the average reductions in yield across MD (17% reduction), CB (16% reduction) and CM (21% reduction), it would appear that a small reduction imposed by a new *cahier des charges* along the lines of Cairanne or Pouilly Fuissé's reduction (7%), for example, would simply be a reflection of an already natural reduction and would be easily assimilated by growers. However, as revealed in section 5.2, in both MD and CB there were a small but significant number of producers who did harvest at close to or at maximum yields of 65hl/ha. At the very top end there were 7 in MD (22.5%) who harvested at the 65hl/ha maximum yield, and 3 in CB (27%), although no-one in CM picked above 60h/ha.

Therefore, if a new cru classification system imposed a reduced yield limit for cru sites, up to a quarter of growers in some sites would have to reduce yields in order to qualify.

Another benefit that Quarts de Chaumes has experienced since grand cru classification is, according to Beauclair, "the opening up of new export markets" (2017, pers comm.). But Sancerre already exports to 124 countries (Roumet, 2017, pers comm.), so this benefit would not be the main attraction for Sancerre growers. The interviews with the Primary Group revealed that for some, export markets "never ask for *lieux dits*; they just want the label to say 'Sancerre'" (Girault, P., 2017); whilst others (Domaines Delaporte and Paul Prieur) have recently won a tender with the Norwegian monopoly which explicitly sought not just any *lieu dit*, but specifically Les Monts Damnés.

### 6.2.3 Beyond price and yield: other considerations

A cru classification system would involve so much more than just a reduction of maximum yields. A shortlist of potential considerations has been drawn up by reviewing the recent classifications of the following appellations: Cairanne, Chianti Classico Gran Selezione, Coteaux du Layon 1er Cru Chaume, Muscadet, Quarts de Chaumes, and Rasteau. The examples also draw from Pouilly Fuissé, whose application is in the final stages of approval.

Vineyard/harvesting:

- Reducing yield
- Banning herbicides
- Pruning regulations
- Minimum vine age
- Minimum must weight
- Obligatory hand-harvesting
- Banning purchasing of grapes (i.e. *négociant* business)

Winery/ageing:

- Reducing sulphur dioxide
- Banning chaptalisation
- Banning cryoextraction (non-applicable in Sancerre)
- Minimum ageing requirement before bottling

A new classification in Sancerre could give the opportunity to review the requirements around wines from its top sites, for which there is clearly some demand. All those who answered yes to Q21 specified one or more of the above points, with the most frequent responses being: banning herbicides, obligatory hand-harvesting, and increasing the minimum ageing requirement. The only points above which were not singled out by anyone in the Primary Group were

banning purchasing of grapes, banning chaptalisation, and banning cryoextraction.

Many interviewees explained that they already made differences in the vineyard and cellar between their traditional Sancerre blanc and single vineyard wine, including oak ageing and extended ageing before bottling. Matthieu Delaporte's (2017) MD is aged in oak, whilst his traditional Sancerre blanc is raised exclusively in stainless steel, and Luc Prieur (2017) ages his MD on lees for twice as long as his traditional Sancerre blanc (14 months versus 7).

### **6.3 Trends shown by dates and frequency of single vineyard wines**

The theory of experts established in section 3.2 that single vineyard wines are on the increase has been borne out by the results. All three sites show a significant increase, particularly acute in the case of CM where almost all growers who have vines within the site are now marketing a single vineyard wine (20 out of the 23 respondents).

The evidence of economic uplift shows that the market recognises the higher quality of these sites in its willingness to pay a premium. The increasing frequency of single vineyard wines in the study proves that Sancerre producers have been realising the commercial potential of this opportunity. But it also shows that the steep increase will soon tail off: with 20 out of 23 respondents already marketing CM there is not much more room for growth. In the case of MD (17 out of 31) and CB (6 out of 11), there would appear to be further opportunity for growth. However, the village of Chavignol has a high proportion of small-scale

growers, including some older *vignerons* tending a small number of vines into their retirement and selling their grapes to larger producers. In fact, there are 11 growers in MD with less than 0.3ha apiece. Most of this sub-group are unlikely to begin bottling and marketing their MD as a single vineyard wine despite the evidence presented by the results of the economic advantage in doing so. Most of them do not have their own winemaking facilities, so any superficial economic advantage in single vineyard wine would be absorbed by the capital cost of production.

#### **6.4 Other trends and the optimal number of wines**

The results also confirm experts' opinions that Sancerre producers are looking for other ways to differentiate their products and add value. As well as traditional Sancerre (white, red, and rosé) and the three single vineyards studied here, the average 6.49 wines per producer in the Primary Group are made up of other single vineyard wines, prestige *cuvées* and 'terroir wines', the latter at a rate of 25%.

A theme that emerged in the semi-structured interviews was that of the optimal number of wines it was practical for one producer to market. Although one producer does successfully market 15 *cuvées*, the mean average of 6.49 and the mode average of 6 suggest this is the most practical and profitable number of wines. Some producers with holdings in prestigious sites choose not to bottle and market them separately. Some felt that three or four white wines within their portfolio, plus a red and a rosé, was the maximum practical limit their export

markets would absorb. There was also a clear emphasis amongst producers in wanting to produce a high-quality traditional Sancerre blanc. Matthieu Delaporte (2017) explained that exponentially increasing the number of single vineyard wines and thereby reducing the volume available for the traditional blend could result in producers being unable to sell all their lines, at the same time as not being able to satisfy demand for a generic Sancerre blanc.

## **7. CONCLUSIONS**

The remit of this Research Paper was to investigate three main questions, as laid out in section 2. The following conclusion addresses them in turn.

### **7.1 The economic uplift**

*What is the economic uplift that growers are currently achieving across MD, CB, and CM in comparison with traditional Sancerre, and has this been stable or divergent over the past five years?*

The results have laid out the economic uplift in ex-cellars prices that growers are achieving as 69% higher in the three single vineyards in comparison with traditional Sancerre blanc. Growth in both has been steady and relatively stable over five years, with a marginal advantage seen in the single vineyards which grew at a rate of 14% compared to traditional Sancerre blanc's 10%. However, this is outpaced by growth in the price of bulk Sancerre blanc, which grew at 27%, albeit from a lower base. This suggests that whilst single vineyard wines perform impressively against traditional Sancerre blanc within the Primary Group of growers, there is evidence in the wider market that the name 'Sancerre' still holds the greatest currency.

## **7.2 Is there a *de facto* system already?**

*In comparison with other classified appellations, have the growers of Sancerre already achieved a de facto cru system in these three lieux dits in terms of price and yield?*

Analysis of price and yield have shown that Sancerre has, from an economic point of view, the benefits of a *de facto* cru system: the highest quality sites can be marketed at much higher prices than generic communal wines, and even with lower yields they can still realise a large economic uplift in euros per hectare.

## **7.3 Cru classification for Sancerre**

*Should Sancerre consider a cru classification system, and what would be the pros and cons for the appellation?*

The results show that it is unlikely that a cru classification system would dramatically improve the steady increase of euros per litre that Sancerre growers already enjoy. So what other benefits or drawbacks would be worth consideration?

### **7.3.1 Benefits**

Fine wine consumers are exposed to a diverse range of cru classification systems: the words 'premier cru', 'grand cru' and 'cru classé' hold currency. The results have shown that these three sites are recognised by the market as superior to generic Sancerre; but even amongst knowledgeable consumers,

without a classification system that specifies that a wine comes from a specific site (through the use of the word 'cru' for example), it is often impossible to tell which wine names are *lieux dits cadastrés* and which are just brand names. Classification could clarify this point, empowering the consumer with knowledge, and enabling supply chain intermediaries to better communicate with consumers. Revised regulation could give an opportunity to safeguard quality criteria for the future, and it may even lead to new export opportunities, as Quarts de Chaumes has experienced.

### **7.3.2 Drawbacks**

Cru classification is by no means a panacea. In the case of Alsace, Humbrecht comments: "If you compare with many other white wine regions, Alsace's average price (€4.05 export) is probably much higher, while the Grand Cru average is much lower!" One possible reason for this, he suggests, is that "perhaps there is something off-putting/exclusive about the title Grand Cru which actually puts off some consumers" (2016, pers comm.). There is a danger that the ubiquity of the label 'cru' will contribute to a reduction in its potency, or even render the classified wines less attractive to consumers than they currently are as unclassified wines.

Stricter criteria for 'cru' sites could contribute to higher quality, although they are no guarantee. One of the appellation's most well-known and respected growers, Jean-Christophe Bourgeois, is emphatic on this point. He argues that by classifying a certain site as a cru, it does not automatically ensure a better quality

wine than that from a neighbouring communal site, citing Burgundy as an example. That is, even if the site objectively satisfies all the criteria with the INAO for cru status (soil, exposition, drainage, historical usage, price uplift, tasting and so on), its true quality is only realised by the best *vignerons*, and weaker ones will make a mediocre wine from the outstanding site. He sees classification as a way to “justify an increase in price without an obligation to improve quality” (2017).

A strong argument amongst those who answered no to Q21 was that the appellation simply doesn't need it. Some were apprehensive that an elevation of certain sites would necessarily result in a devaluation of others, as seen in the case of Petit Chablis.

Another major drawback identified in section 5.6 amongst those who answered no to Q21 was producers' reluctance to disrupt the co-operative solidarity currently enjoyed in the appellation. A recurrent theme amongst these respondents was that drawing up a cru classification system in Sancerre could prove divisive and cause too much “jealousy”. However, even amongst this subgroup who were against a hierarchical cru classification system, there was a strong desire for some sort of safeguard to better serve and protect the diversity and quality of the appellation.

Further drawbacks are the costs involved in an application, as well as the time it might take (with no guarantee of approval). Both Pouilly Fuissé and Cairranne's applications were first made in 2008. Cairranne was successful in 2016 (Douglas,

2016), and subject to a vote by its growers, Pouilly Fuissé should see approval in July 2017 (Burrier, 2017, pers comm.).

Another consideration is that the market, even if the producers might accept it, may not embrace a new classification. Chianti Classico's Gran Selezione classification of 2014 is one recent example<sup>33</sup>, which David Berry Green has said is simply 'bureaucratic tinkering that adds no real value' (cited by Brook, 2014). So unsatisfactory is the new classification that 'exceptional producers [such] as Querciabella and Isole e Olena are opting out of the category altogether' (McCoy, 2015).

### **7.3.3 A way forward**

Commentators like Budd point out what a pro-active ethos the growers of Sancerre share, investing a large proportion of their capital back into cellar and vineyard technology as they strive to improve quality (2016, pers comm). There are two simple means for growth in an appellation, as summed up by one producer, François Crochet: "you either increase the surface area or you increase the quality" (2017). The unanimous consensus amongst producers in the Primary and Secondary Groups was that Sancerre should not grow in surface area: it is "a small appellation with a world-wide reputation" (Guillerault, 2017), and it should stay that way.

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<sup>33</sup> Chianti Gran Selezione is not linked to *terroir*, but is based on minimum ageing requirements. Chianti Gran Selezione must be aged for a minimum of 30 months (including at least 3 months in bottle), whereas Chianti Classico Riserva is 24 months, and Chianti Classico is 12 months (Beavers, 2015).

Rather than total reclassification into crus, a review of the *cahier des charges* could present an opportunity to safeguard quality standards in the appellation for the future through the tightening of requirements around the use of *lieu dit* names. This is the position proposed by the president of the Sancerre Growers' Syndicate, Gilles Guillerault, who is in favour of what he coins "segmentation" (2017). He suggests there are around 20 *lieux dits* in regular use that would merit closer regulation, and anticipates the project taking five years (three for research and two for implementation). The choice of which *lieux dits* would be chosen may be a fraught one (there were 30 individual sites named by the Primary Group in this research). Even without classifying them as 'cru' and therefore at a different quality level from generic AOC Sancerre, the act of singling them out for special treatment would still require delicacy and diplomacy to be satisfactorily implemented. No list will ever satisfy all producers; however it is clear that a small majority of the Primary Group is not satisfied by the current system, with 54% answering yes to Q21, indicating the appellation's appetite for change.

A review of the current system could present an opportunity to incorporate some of the considerations presented in section 6.2.3, and as a moment to amend how *lieu dit* wines are declared. A new system could use the words '*lieu dit*', or even '*climat*' or '*parcelle*' (the latter two being easier for non-French speaking export markets) on the labels (or back labels) of wines from classified sites, and insist on the word '*cuvée*' being used clearly on the labels of anything that is not (but could easily be mistaken for) one of these classified sites. In 2017 Domaine

Henri Bourgeois is launching its collection, '*Les Parcelles*', which uses this very idea to introduce four newly isolated single vineyard wines.

Currently it is only the *code rural* that demands growers declare their *lieux dits cadastrés* with the local customs bureau, however the INAO do not enforce this. Growers can therefore currently flout this requirement without reprisal. A continuation of this unregulated situation could give rise once again to the abuse seen in CM in the late 1980s and early 1990s, which lead Jefford to have declared it 'a practice so evidently untrustworthy' (Jefford, 2002, p. 51). Even some of those opposed to a hierarchical cru classification system can see the benefit in protecting the use of these *lieu dit* names, whose reputation they have collectively built over the years.

A review of Sancerre's *cahier des charges* could also present the opportunity to regulate the use of soil names in 'terroir wines'. Made famous by Pouilly Fumé's preeminent grower, Didier Dagueneau, Sancerre growers can enjoy the collective name spill-over effect for their 'Silex' *cuvées*. Nothing in the current *cahier des charges* regulates the use of *terroir* names like 'Silex', and so this too could be open to abuse. Despite being the least dominant of the three major soil types in the region it was clearly the most popular soil name used amongst the respondents who made 'terroir wines'. Should the current absence of regulation be taken advantage of and subsequently be exposed, consumer confidence could be damaged. Simple regulation through a requirement to declare the specific parcels used for 'terroir wines' could prevent this. This regulation could also insist on a longer minimum ageing period for certain soil types. Bourgeois

states that a *silex* wine needs many more months ageing before release than a *caillottes* wine (2017).

Currently there is no official map of the soil types on a site-by-site basis in Sancerre, however this is being worked on by the UVS (Prieur, N., 2017, pers comm.). Once their comprehensive map of the appellation's soils is published, there would be a practical means by which to implement this regulation.

#### **7.4 The limits of this study**

Because not all growers abide by the *code rural* and declare their single vineyard wines with the local customs bureau, further study could reveal additional producers in these three sites that this study has missed.

A larger study could look at a wider range of *lieux dits*, and certainly an application to the INAO would include many more than the three here. However, for the purposes of clarity and focus, the quantitative questionnaire put to the Primary Group carried out for this Research Paper was limited to MD, CB and CM only, because of their historical and current significance. The study's results can be extrapolated to demonstrate the function of single vineyard wines across the appellation, however with a degree of caution: no two sites are the same, and very often history, local politics, and the distribution of ownership may govern price uplift over and above the innate quality of the wines produced from the site.

## 7.5 An evolving picture

Clearly Sancerre is experiencing a pivotal moment: a receptive market has supported the surge in single vineyard and ‘terroir wines’, as well as the healthy increase in prices. A new generation of growers are bent on raising quality through diversifying their portfolios and producing distinctive wines from this single tier appellation. And there is agitation for change: the Prospective Commission met in February this year, in between the two data gathering trips, to debate segmentation of *lieux dits*<sup>34</sup>.

Evidence of price uplift between traditional Sancerre blanc and single vineyard wines indicate Sancerre could be a candidate for a cru classification system. But despite its many similarities with other appellations, Sancerre stands apart in that it successfully markets its wine on both site (the *lieux dits*) and soil type (the ‘terroir wines’). A review of its classification should take both of these into account.

The data presented in this paper shows that Sancerre already enjoys the economic benefit of a cru classification system. It probably would not stand to benefit further in terms of price increases should a cru classification system along traditional lines be sought. However, a review of its *cahier des charges* and the governance of its *lieux dits cadastrés* could benefit the appellation by safeguarding the criteria necessary for marketing under its esteemed *lieux dits*.

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<sup>34</sup> The discussion is ongoing, and no consensus amongst the members has yet been reached.

This in turn could help the consumer understand the identities of the appellation's diverse wines much better than they are currently able to do.

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## 9 APPENDICES

### 9.1 Appendix 1: Approved Research Paper Proposal

IMW Research Paper Proposal Submission Form			
Student ID	23860	Date of submission	12/12/2016
RPP Version No	2	Name of Advisor	Emma Symington MW
<b>Note: RPPs must be submitted via your Advisor to the IMW</b>			
<b>Proposed Title</b>			
Sancerre's single vineyard wines versus formal cru classification systems: an investigation of Les Monts Damnés, Les Culs de Beaujeu, and Chêne Marchand.			
<b>Research Questions:</b> Define the subject of your Research Paper and specify the specific research questions you plan to pursue. (No more than 200 words)			
<p>There is an increasing trend for single vineyard wines in Sancerre, particularly in the past 5 to 10 years according to Benoit Roumet, President of the BIVC. Three of the largest are Les Monts Damnés, Les Culs de Beaujeu, and Chêne Marchand, across which over 50 growers bottle single vineyard wines, accounting for 15% of Sancerre's 341 producers (LRVF).</p> <p>Sancerre's diverse soil types and varied slopes suggest it could be a candidate for classification: how does it compare to established systems (like Alsace) and more recent classifications (like Rasteau and Chianti Gran Selezione), and should the appellation consider an application?</p> <p>By studying three of Sancerre's largest and most important <i>lieux dits</i> this paper will ask:</p> <ol style="list-style-type: none"> <li>1. What is the economic uplift that growers are currently achieving across these three single vineyards in comparison with traditional Sancerre, and has this been stable or divergent over the past 5 years?</li> <li>2. In comparison with other classified appellations, have the growers of Sancerre already achieved a <i>de facto</i> cru system in these three <i>lieux dits</i>?</li> <li>3. Should Sancerre consider a cru system, and what would be the pros and cons for the appellation?</li> </ol>			

**Background and Context:** Explain what is currently known about the topic and address why this topic requires/offers opportunities for further research. (No more than 200 words)

Sancerre has a diverse tapestry of soils and varied hillside expositions. Its red, white, and rosé wines are all made from single grape varieties. It could therefore be assumed that the appellation naturally lends itself to a cru system like that found in Alsace, yet none exists.

In 2015 Sancerre produced over 177khl and exported 60% of its production (BIVC). La Revue du Vin de France (LRVF, October 2016) identified 341 growers operating across Sancerre's 2,950 hectares. President of the BIVC, Benoit Roumet, identifies the three most important *lieux dits* as: Les Monts Damnés, (34.8ha) Les Culs de Beaujeu (11ha), and Chêne Marchand (27ha).

Classification in Sancerre was a point of discussion in the 1980s (Jasper Morris MW), but no formal application was ever made. However since Quarts de Chaume Grand Cru and Coteaux du Layon 1er Cru Chaume were classified in 2011, the topic of classification has become a relevant one in the Loire again. Should serious consideration be given to the introduction of a formal classification system in Sancerre? Would it benefit growers, or has the market recognised a *de facto* cru system to such an extent there would be nothing to be gained?

**Sources:** Identify the nature of your source materials (official documents, books, articles, other studies, etc.) and give principle sources if appropriate. (No more than 150 words)

- L'Union Viticole Sancerroise (UVS)
- Les Vins du Centre Loire (BIVC)
- La Maison des Sancerre
- Regional bodies and experts in comparison appellations
- Research Journals
- Press Publications: Decanter, Meiningers, The Drinks Business, La Revue du Vin de France; websites like Vinous.com, Purple Pages
- Interviews with Sancerre/Loire experts (Jim Budd, Chris Kissack, Nathalie Prieur, Benoit Roumet for example)
- On visits to Sancerre a range of quantitative and qualitative data will be gathered through interviews with growers and meetings with the regional bodies. Grower interviews will concentrate on producers who bottle single wines of the three main *lieux dits*. Growers who have no such holdings will also be canvassed for perspective, as well as those with small parcels within the three main *lieux dits* but no single vineyard wines. Prominent growers with a high number of single vineyard wines beyond the three main *lieux dits* will also be approached.

**Research Methodology:** Please detail how you will identify and gather the material or information necessary to answer the research question(s) and discuss what techniques you will use to analyse this information. (No more than 500 words)

A comprehensive list of growers bottling single wines of the three main *lieux dits* will be drawn up by asking both the UVS and BIVC, and crosschecking with growers' websites. Preliminary research shows this list is just over fifty growers, all of whom will be contacted to request an interview, plus other prominent growers with a high number of other single vineyard wines.

Semi-structured interviews with Sancerre growers:

Questionnaire to gather quantitative data:

- Date of first single vineyard wine; dates of any later single vineyard wines
- Yield of traditional Sancerre versus single vineyard wine
- Ex-cellar prices of traditional Sancerre versus single vineyard wines across the past 5 vintages (2010-2014)

Discussion to gather qualitative data:

- The conversational part of the interview will be used to ask growers' opinions on the subject of single vineyard wines and the potential for a classification system.
- They will be asked to pin point any differences in viticultural or vinification practice that might have a bearing on the cost of production of single vineyard wines versus traditional Sancerre.

The date of each grower's first declaration of single vineyard wine will reveal at what rate this trend is increasing (do the numbers confirm the general feeling shared by experts Roumet, Kissack and Budd, relayed in personal communications in October 2016?).

The uplift in ex-cellars price between traditional Sancerre and the three main *lieux dits* will be worked out as an average for each vintage, as will the reduction in yield (if any). This will enable a price per hectare for traditional Sancerre versus single vineyard Sancerre to be deduced, and whether prices are stable or reveal an upward or downward trend over the 5 vintages, 2010-2014.

Investigation into the economic impact of classification in other regions:

The Sancerre data (ex-cellar price per hectare of communal versus single vineyard) will be compared with apposite classified appellations to establish whether Sancerre has achieved the economic benefit of a *de facto* cru system already, or whether there is potential for further gain.

Regional bodies in comparison appellations will be approached for figures regarding average price and yield limitations in classified versus communal sites.

- Alsace (cru system first established over 40 years ago). The current price of communal and grand cru will be set against yield limitations to establish the price per hectare of the two classifications, and compared with the Sancerre's data to demonstrate whether Sancerre has achieved the economic benefit of a cru system similar to Alsace's without the legislation.
- Other more recently classified regions (Rasteau and Chianti for example) will be

investigated to see whether they have experienced a significant uplift in ex-cellars price after their classification. This will inform whether there is the potential for further gain in Sancerre.

- Current applications, like that of Pouilly Fuissé, will be examined to establish the potential pros and cons of such an application for Sancerre. This will help establish whether there are other limiting factors for and against a cru system in Sancerre.

**Potential to Contribute to the Body of Knowledge on Wine:** Explain how this Research Paper will add to the current body of knowledge on this subject. (No more than 150 words)

By examining the three most significant potential 'cru' sites this paper will demonstrate whether Sancerre growers have already realised the economic benefit of a *de facto* cru system, or whether there is potentially more to be gained from formal classification.

By measuring ex-cellars prices across the 5 vintages, 2010-2014, it will show whether prices are stable, or whether the difference between *lieux dits* and traditional Sancerre is diverging. The results could inform Sancerre growers who are currently considering bottling these or other single vineyard wines. The results could also inform other similar appellations: should they follow Sancerre's current model, which presently operates without a formal system, or should they consider application for classification?

**Proposed Time Schedule/Programme:** This section should layout the time schedule for the research, analysis and write-up of the Research Paper and should indicate approximate dates with key deliverables. *Dates of submission to both Advisors and the IMW must be those specified by the IMW.*

October/November 2016

- Finalise and submit proposal.
- Contact regional bodies regarding the number of growers who bottle wines of the three single vineyards. A database of growers with holdings in any of the three *lieux dits* will be drawn up, to be populated with data gathered during interviews in January and February.
- Begin background research on comparison regions.

December 2016

- Contact growers to arrange appointments.
- Complete literature review.
- Continue researching how cru systems work in other appellations.

January/February 2017

- Visit growers, conduct interviews.

March/April 2017

- Analyse results, write up.

May 2017

- Edit and format. Submit draft to advisor.

June 2017

- Final changes and re-writes based on feedback from advisor. Final submission.

## 9.2 Primary Group of respondents

<b>Producer</b>	<b>Name of respondent</b>
AUCHERE Philippe	Philippe Auchere
ALDON Lionel	Lionel Aldon
BAILLY REVERDY SAS	Aurélien Bailly
BAILLY Sylvain & FILS	Sonia Bailly-Fau
BALLAND Pascal EARL	Pascal Balland
BARDIN Richard EARL	Audrey Bardin
BOULAY Daniel	Daniel Boulay
BOULAY Gérard SAS	Gérard Boulay
BOURGEOIS Cédric	Cédric Bourgeois
BOURGEOIS Henri SARL	Jean-Christophe Bourgeois
BROCHARD Hubert SAS	Daniel Brochard
CAVE DU PRIEURE SCEA	Gilles Guillerault
CIROTTE SAS	Fabien Cirotte
COTAT François	François Cotat
COTAT Pascal	Pascal Cotat
CROCHET Dominique & Janine EARL	Cyprien Crochet
CROCHET François	Carine & François Crochet
CROCHET Jean Marc SCEV	Mathieu Crochet
CROCHET Lucien SA	Gilles Crochet
DAGUENEAU Didier	Charlotte Dagueneau
DAULNY Bertrand	Bertrand Daulny
DELAPORTE SCEV	Matthieu Delaporte
DENIZOT François	François Denizot
DOMAINE DES GRANDES PERRIERES	Jérôme Gueneau
DOMAINE DES TERRES BLANCHES	Philippe Reculet & Laurent Saget
FONTAINE Patrice	Patrice Fontaine
FOURNIER PERE & FILS SAS	Damien Laurent
GIRARD Anthony	David Girard
GIRAULT Michel EARL	Anthony Girault
GIRAULT Pierre & FILS EARL	Patrick Girault
GODON EARL	Sylvain Godon
JOLIVET Laure SCEV	Valentina Buoso
JOLIVET Pascal SCEV	Valentina Buoso
LALOUE Serge SAS	Christine Laloue
LAPORTE (BOURGEOIS)	Cédric Bourgeois
LAPORTE SERGE	Guillaume Laporte
MERLIN CHERRIER Thierry SAS	Thierry Merlin
MILLET Gérard SAS	Steve Millet
MOREUX Roger & Christophe SARL	Christophe Moreux
MORIN Pierre EARL	Pierre Morin
NEVEU André SCEV	Thomas Dezat
PAILLARD Bertrand	Bertrand Paillard
PINARD Vincent SCEV	Clément Pinard

PRIEUR Paul & FILS SCEA	Luc Prieur
PRIEUR Pierre & FILS SAS	Bruno Prieur
REVERDY-DUCROUX SAS	Laurent Reverdy
ROGER Dominique SCEA	Dominique Roger
SALMON Christian SAS	Armand Salmon
THOMAS Noël	Noël Thomas
THOMAS Paul	Raphael Thomas
THOMAS-LABAILLE EARL	Jean-Paul Labaille
VATAN Edmond & Anne	Anne Vatan
VERON Thierry	Thierry Veron

### 9.3 Sample Questionnaire (Primary Group)

1. Date					
2. Producteur/Domaine					
3. Nom de répondant					
4. Totale en hectares de vignes du Sancerre					
5. Mettez-vous en bouteille les vins des lieux dits individuellement?	Oui	Non			
6. Vendez-vous des vins pour l'exportation?	Oui	Non			
7. Achetez-vous des raisins du Les Monts Damnés, Les Culs de Beaujeu ou Chêne Marchand?	Oui	Non			
8. Vendez-vous des raisins/jus/vin en vrac du Les Monts Damnés, Les Culs de Beaujeu ou Chêne Marchand?	Oui	Non (*Si vous vendez des raisins/just/vin en vrac, veuillez indiquer votre prix de vente aux négociants en € / l ou € / kg pour les questions 14/15/16)			
9. Nombre de cuvées du Sancerre (2014) (indiquez combien)		Sancerre classique (blanc/rouge/rosé inclusivement)	Lieu Dit cadastré (sur l'étiquette)	<<Terroir>> (sur l'étiquette)	Autre (eg: Cuvée Prestige, Vieilles Vignes, des marques)
	Totale				
10. Rendement moyen du Sancerre Blanc classique (2010 - 2014) (hl/ha)					
11. Rendement moyen du Sancerre Rouge classique (2010 - 2014) (hl/ha)					
12. Le prix ex-caves export hors tax, Sancerre Blanc classique (€/bt)	2010 €/bt	2011 €/bt	2012 €/bt	2013 €/bt	2014 €/bt
13. Le prix ex-caves export hors tax, Sancerre Rouge classique (€/bt)	2010 €/bt	2011 €/bt	2012 €/bt	2013 €/bt	2014 €/bt

<b>14. Les Monts Damnés</b>					
14.1 Hectares					
14.2 Rendement moyen (2010 - 2014) hl/ha					
14.3 Mettez-vous en bouteille ce vin chaque année?	Oui	Non			
14.4 Le prix ex-caves export hors tax de Les Monts Damnés €/bt	2010 €/bt	2011 €/bt	2012 €/bt	2013 €/bt	2014 €/bt
14.5 Date du premier millésime					

<b>15. Les Culs de Beaujeu</b>					
15.1 Hectares					
15.2 Rendement moyen (2010 - 2014) hl/ha					
15.3 Mettez-vous en bouteille ce vin chaque année?	Oui	Non			
15.4 Le prix ex-caves export hors tax de Les Culs de Beaujeu €/bt	2010 €/bt	2011 €/bt	2012 €/bt	2013 €/bt	2014 €/bt
15.5 Date du premier millésime					

<b>16. Chêne Marchand</b>					
16.1 Hectares					
16.2 Rendement moyen (2010 - 2014) hl/ha					
16.3 Mettez-vous en bouteille ce vin chaque année?	Oui	Non			
16.4 Le prix ex-caves export hors tax de Chêne Marchand €/bt	2010 €/bt	2011 €/bt	2012 €/bt	2013 €/bt	2014 €/bt
16.5 Date du premier millésime					

17. Mettez-vous en bouteille des autre lieux dits individuel?	Oui	Non		
18. Lesquels?				
19. Mettez-vous en bouteille les <<vins de terroirs>>? (quand vous mettez le nom du sol sur l'étiquette)	Oui	Non		
20. Lesquels?	<<Silex>>	<<Terres Blanches>>	<<Caillottes>>	Autre
21. Pensez-vous que Sancerre pourrait bénéficier d'un système de Cru Classé?	Oui	Non		

#### 9.4 Sample Questionnaire (Secondary Group)

1. Date				
2. Producteur/Domaine				
3. Nom de répondant				
4. Totale en hectares de vignes du Sancerre				
5. Mettez-vous en bouteille les vins des lieux dits individuellement?	Oui	Non		
6. Lesquels?				
7. Mettez-vous en bouteille les <<vins de terroirs>>? (quand vous mettez le nom du sol sur l'etiquette)	Oui	Non		
8. Lesquels?	<<Silex>>	<<Terres Blanches>>	<<Caillottes>>	Autre
9. Pensez-vous que Sancerre pourrait bénéficier d'un système de Cru Classé?	Oui	Non		