

WSET Study Tour to Bordeaux – March 2009

By Nick Anderson

The Dry White Wines of Bordeaux – A Quality Future

The most impressive feature of the recent WSET study tour to Bordeaux I joined was the quality of the white wines. The tour itself provided a broad overview of the region, through a combination of presentations, Chateau tours and tastings. And like the production volumes and public image of the region, it was skewed towards the more famous red wines.

Like many people, my introduction to wine was with my parents at the meal table, and as with many of their generation the wines were almost always French. But while the red wines of the Haut-Medoc and St-Emilion grabbed my attention with their structure, complexity and enticing aromas, the white wines, often Entre-Deux-Mers, were simply dull. With my own wine purchasing coinciding with the start of the Australian export boom, my white wine consumption therefore became very New World centric and I forgot about the white wines of Bordeaux.

The quality of the Bordeaux white wines on this trip was thus a real surprise and I was curious to learn more about these exciting wines. This report therefore looks at when and why the change in quality happened, and the outlook for the future.

The Present

My pre-trip perception is not unique. Writing in early 2008, respected wine author, commentator and blogger, Jamie Goode confessed to his lack of interest in (and ignorance of) the white wines of Bordeaux.

“I never drink white Bordeaux. Ever. Nor does anyone else. If you want Sauvignon, you go to New Zealand or the Loire. If you want it with a splash of Semillon, you go to Margaret River. What's the point of Sauvignon with an attitude problem? And it's only Americans who try to oak their Sauvignons.”

Jamie Goode's Wine Blog 31/1/2008 (Goode 2008a)

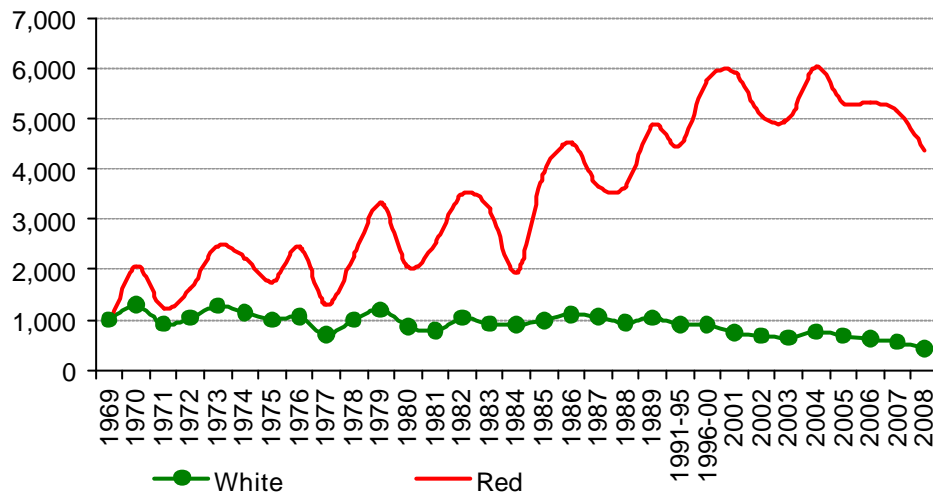
Victoria Moore, the Guardian's wine critic, echoes these sentiments, noting that white Bordeaux is the “most unfashionable sauvignon blanc” and that “asking for it produces the same reaction as I received in Currys recently when I tried to buy a non-widescreen TV” (Moore 2009).

White wine now accounts for just under 9% of all AOC wine produced in the Bordeaux region, with four-fifths being dry, the remainder sweet. The white varieties, predominantly Sauvignon Blanc, Semillon and Muscadelle, account for 11% of all plantings in Bordeaux; the lower share of production reflecting the lower yields of the sweet wine vineyards. Historically, however, white wines were very important. Indeed, immediately post-war, two-thirds of all Bordeaux wines were white (Asimov 2008b).

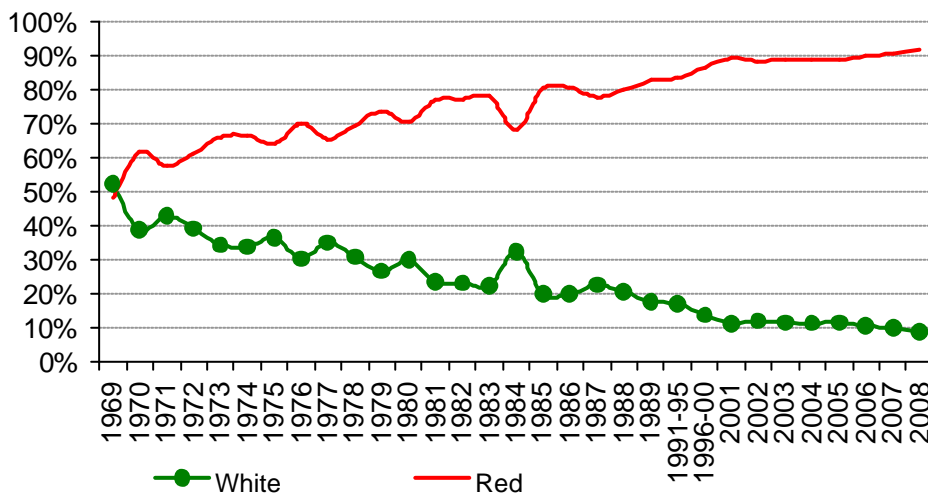
The Past

As Figure 1 shows, the decline of white Bordeaux was until the mid 1990s, a relative one. From 1969 to the mid 1990s, production averaged c. 1m hL whereas over the same period, red wine production rose more than five-fold. The consequence was a decline in share from just over 50% to 15%. The subsequent fall in share to below 10% coincided with an absolute decline in production from 1m hL to 0.5m hL in the damp, cold vintages of 2007 and 2008.

Figure 1. Bordeaux – AOC Wine Production by Type
a) Volume ('000 hL)



b) as %



Source: Conseil Interprofessionnel du Vin de Bordeaux (CIVB)

The decline can be attributed to several factors:

- ? Fashion for red wines. The principal driver of the relative decline has been the fame and fashion for the red wines which constituted all the new/ replacement plantings during this period (CIVB 2009). In the British market at least,

“Bordeaux” is effectively a synonym for claret and thus red wine (Moore 2008). Many consumers are ignorant of the white wines.

“... consumer research indicates that most people who buy [Chateau] Carbonnieux have no idea that it comes from Pessac-Léognan or that it's a Bordeaux. That's good for Carbonnieux, I suppose, but indicates the recognition problem with white Bordeaux.”

Eric Asimov, NY Times Wine Critic (2008a)

- ? Bad winemaking. With the focus on red wine, Halliday & Johnson (2006) argue that white wines were a side show, that winemakers used red wine equipment and techniques “to produce what everyone knew was second-class wine”. Such oxidative practices therefore required very high levels of SO₂ with consequent substitution of fruit aromas for sulphur or, worse, once in bottle the risk of reductive aromas (cabbage etc) developing.
- ? Less favourable economics. Not only have the red wines of Bordeaux fetched higher prices than the white wines (see Figure 2), the white wines have in general to be sold sooner – in the event of a poor economic climate, the red wines can always be aged an extra year, gaining complexity.

“It is a more difficult commercial decision to grow white grapes as the wine has to be sold quickly, whereas red can be kept and appreciate in value as it is stored.”

Olivier Lebrun, director, Chateau Olivier (Anson 2009a)

- ? Uncertain style. With the success of varietal labeling, Bordeaux whites with their varying styles can cause uncertainty for the consumer. The wine might (and increasingly is) a pure Sauvignon Blanc but it may also be a blend with Semillon, Muscadelle and possibly Sauvignon Gris, and it may or may not have seen oak. These differences are not always communicated clearly on the label and can disconcert the unsuspecting consumer used to New World certainty.
- ? The ageing question. Consumers generally consume all wine they buy within 48 hours of purchase; if they are going to age a wine, it would almost certainly be a red wine. In other words, consumers have been educated to drink white wines young. The complexities that some Bordeaux white wines can reach with bottle age would therefore be lost. Victoria Moore (2008) described an aged white Domaine de Chevalier “as one of my best ever wine experiences”.

The Future

The renaissance in quality can be traced back to the late 1970s (Johnson & Halliday 2006). In 1978, Australian legend Len Evans was part of a consortium that bought Chateau Rahoul in the Graves. Brian Croser (of Petaluma fame) was brought in as wine-maker for the 1979 vintage and applied New World techniques such as cold stabilization and temperature controlled fermentation resulting in a cleaner and fruitier wine.

The baton was picked up by Denis Dubourdieu (Professor of Oenology at the University of Bordeaux) and a further influx of flying winemakers from Australia during the 1980s (ibid). Dubourdieu's influence is particularly significant. His research into white winemaking (including picking dates, fermentation temperatures, yeast selection, pre-fermentation cold maceration, lees ageing, barrel fermentation etc) has had significant influence on white wine making not just in Bordeaux but globally (Robinson 2006).

“People rarely talk of white Bordeaux so it's paradoxical that the real scientific advances over the past 20 years in Bordeaux have been in whites.”

Professor Denis Dubourdieu (Anson 2009a)

Tom Stevenson (1997) argues that the other key element to the renaissance of the white wines of Bordeaux (Graves in particular) was the carving out of the Pessac-Léognan AOC in 1987. He refers to an identity crisis for white Graves reaching crisis point in the mid 1980s due to wide differences in quality and styles, with winemakers at the best properties in the north the worst offenders. The creation of the new AOC improved quality both within Pessac-Léognan and in the rest of Graves to the south.

Unfortunately for the white wines of Bordeaux, the huge improvements in quality and a clearer identity coincided with the emergence and dominance of the New World wine producers in the export markets. The message was buried. According to research from IWSR and just-drinks (Cooper 2009), New World wine sales grew by 20% p.a. between 1988 and 2007 from 8m to 228m 9-litre cases whereas French wine sales fell by 2% p.a. to 133m cases over the same period.

The message may, however, start to emerge driven by a couple of factors.

- ? Increasing production of cult Bordeaux white wines. Both the classed growths of the Haut Medoc and Sauternes are increasingly producing limited quantities of dry white wines alongside their reds and sweet whites respectively. Cos d'Estournel is the most recent entrant and matches the price of its white to its red each year (Anson 2009). In the same way that the popularity and prices of the top Bordeaux reds drove investment in red wine production post war, the emerging high-end white wines may stimulate interest in the rest of the Bordeaux white wines.
- ? Increasing support from critics. A number of high profile wine commentators and critics are pushing the message of the quality revolution in Bordeaux white wines – Robinson, Moore, Clarke, Spurrier in the UK, Asimov in the US (although strong critical support for Riesling shows that this does not always influence consumer perception).

“I strongly urge you to take advantage of the revolution in white winemaking in Bordeaux ... If only there were a similar revolution in Burgundy.”

Jancis Robinson (2008b)

“With the introduction of new technology and new ideas, Bordeaux has become one of France’s most exciting white wine areas. The wines have improved beyond recognition over the last decade.”

Oz Clarke (2004)

“The remaining 15 percent [of wine made in Pessac-Léognan] includes some of the most thrilling, underappreciated white wines in the world, undervalued even though they often fetch a higher price than the reds from the same producers.”

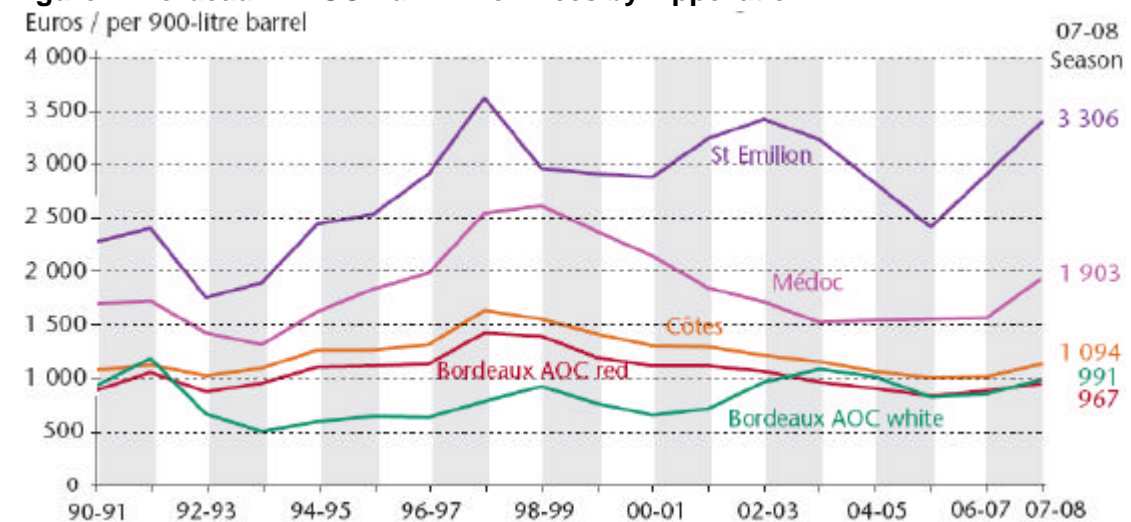
Eric Asimov, NY Times Wine Critic (2008b)

“Medium-priced dry white Bordeaux ... is unjustly ignored in favour of the red versions, and even more so if compared to Sauvignon and Semillon wines made elsewhere in France ... These wines represent some of the best value among the world’s modern dry whites.”

Stephen Spurrier (2008)

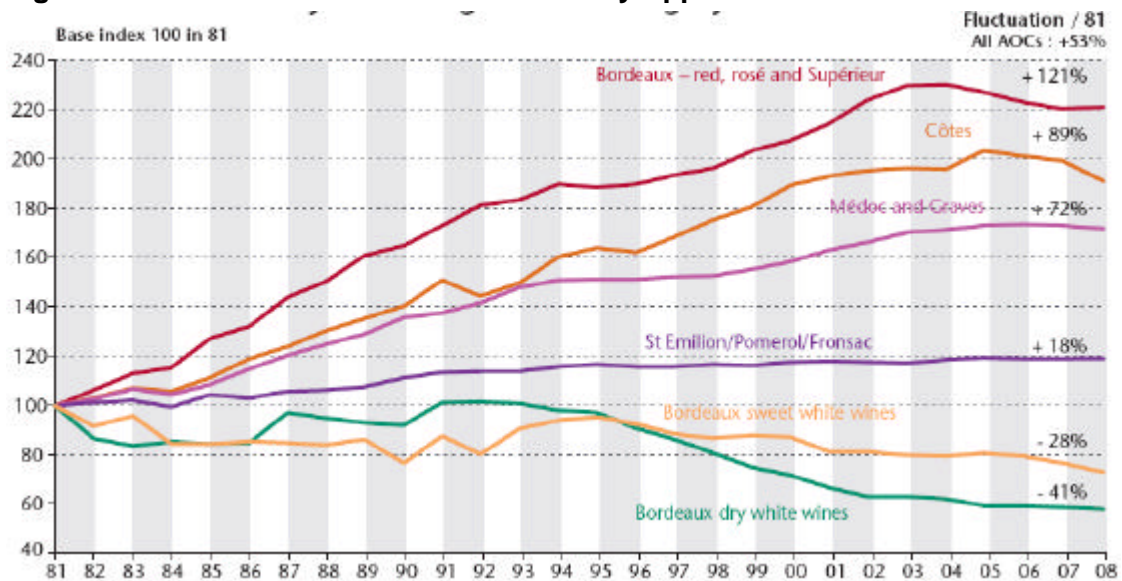
A pick-up in bulk Bordeaux white wine prices suggests that the message may be beginning to find an audience. White wine prices (using bulk prices as an indication) are increasing in absolute terms (and relative to red) from their lows in the 1990s as Figure 2 shows. As the relationship with Figure 3 suggests, prices tend to drive production volumes (although the relationship is more complicated). More significantly, whereas prices of the large volume reds (Bordeaux AOC and Cotes) have been trending down towards estimated production costs of c. EUR 700/ 900-litre barrel (Anson 2009b), the white wines have seen some strengthening in prices. If the pick-up continues then these higher prices may lead to increased plantings and production of white wines.

Figure 2. Bordeaux – AOC Bulk Wine Prices by Appellation



Source: Conseil Interprofessionnel du Vin de Bordeaux (CIVB)

Figure 3. Bordeaux – AOC Wine Production by Appellation



Source: Conseil Interprofessionnel du Vin de Bordeaux (CIVB)

Conclusion

The white wines of Bordeaux have undergone a revolution in quality over the last 20 years led by Denis Dubourdieu and the University of Bordeaux. The dramatic improvements, however, were obscured by the New World wine export juggernaut and therefore production has continued to decline in absolute terms and relative to the fashionable red wines.

Driven by the emergence of cult white wines and increasing support from media commentators, the story of this quality revolution should start to reach a wider audience and positively impact consumer buying choices. Improving bulk wine prices are likely to stimulate producer interest which in turn will raise the wines' profile. Uncertainty over the style of wine, one of the contributory factors to the wines' historic decline in production, can be addressed by better marketing and labeling information. The main impediment in the UK market in the short term is the weakness of the UK exchange rate which has pushed up the price of Bordeaux (and all euro-zone wines) significantly. I myself will be drinking more Bordeaux white wines in the future and I look forward to exploring the great diversity of styles.

The potential to change consumer perceptions for the better can be seen from a more recent blog entry by Jamie Goode who in early 2008 had written a critical piece on these wines. Ten months later he wrote the following:

"I've drunk quite a bit of Bordeaux Blanc over the last few weeks. It varies in quality, of course, but I think it should be a bit more popular than it is. First of all, it's dominated by Sauvignon Blanc, which is super-fashionable these days. Often, it's blended with a bit of Semillon, which adds lemony freshness. And then there might be a bit of Muscadelle in, to add fruity, grapey notes. Bordeaux Blanc can be fresh, fruity and inexpensive. It can also be more serious and more expensive."

Jamie Goode's Wine Blog December 7, 2008

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