

Book Reviews

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KYM ANDERSON and VICENTE PINILLA (eds.): *Wine Globalization: A New Comparative History*. Cambridge University Press, New York, 2018, 566 pp., ISBN: 978-1107192928, \$155.

This volume represents an amazing amount of work, and results in what is probably the first global economic history of wine(s) covering almost 200 years. It is supported by a unique and freely available Excel database¹ compiled by both editors and a synoptic Statistical Compendium² which goes back to 1835 for numerous time series in 47 countries—real bonanza for wine econometricians and quantitative historians.

¹<https://www.adelaide.edu.au/wine-econ/databases/global-wine-history/>

²By Anderson, Nelgen, and Pinilla (2017).

The volume includes 18 chapters, of which 15 are devoted to the economic history of most countries or regions producing wine: France, Germany, Austria, Switzerland, Italy, Portugal, Spain, the United Kingdom, other European countries, the Russian Commonwealth, the Levant, Argentina, Australia, Chile, South Africa, New Zealand, the United States, Algeria, Morocco, Tunisia, Asia, and finally, other emerging regions. Twenty-nine authors contributed to the volume, which is more than 570 pages thick. This will make it difficult to give credit to all authors,³ and I will exercise my right to cherry-pick.

The Introduction starts with a couple of statistical facts that I am sure not many people are aware of. In 1920, Europe accounted for 95% of wine production, and only 5% of it was exported to other countries.⁴ Today, wine is produced in all continents, and world exports represent 40% of what is produced. Although we have become used to large production and trade swings generated by globalization, these changes are huge for a commodity that represents less than 1% of consumers' expenditure, and uses less than 0.2% of the world's cropland. And we are just at the beginning of a much larger revolution according to Philippine de Rothschild, the late owner of one of the most renowned French vineyards, who supposedly said: "Winemaking is really quite a simple business; only the first 200 years are difficult" (p. 3).⁵ The baroness may, however, not be fully right: The famous 1976 *Judgment of Paris*⁶ tasting ranked red and white French wines after Californian wines, whose commercial production started only 122 years earlier.⁷

Even though the volume of wine production today is roughly the same as in 1960, much has changed in terms of quality and producing countries. The editors remind us that "a report commissioned by the French Ministry of Agriculture in 2001 concluded that: '[u]ntil recent years wine was with us, we were the center. Today the barbarians are at our gates: Australia, New Zealand, the United States, Chile, Argentina and South Africa,'" while, at about the same time, the "president of the Union Interprofessionnelle des Vins du Beaujolais, likened Australian wine to Coca Cola and called 'philistines' the consumers who purchased it" (p. 8). Comparing Penfolds' Grange to Beaujolais Nouveau is an insult that should lead inhabitants of Adelaide to declare war on those of Villefranche sur Saône.

The quality of most wines—including Beaujolais Nouveau—increased, and so did their variety, although globalization could have led the industry in the other direction. Meanwhile, the share of French (including Algerian until 1962), Italian, Spanish, Portuguese, Austrian, Hungarian, and German production dropped from

³ A list of authors and chapters is provided below.

⁴ At the time, Algeria was part of France, which counted its large exports to France as French production and not exports.

⁵ Page numbers refer to the volume's uncorrected page proofs, so they may vary slightly from the final published version.

⁶ Of which a full account is given in Taber (2005).

⁷ The first commercial Napa Valley vineyard was planted in 1854 by John Patchett.

roughly 95% of the world production in the early 1860s to 60% in 2010–2015 (p. 36). The former European Union (EU)¹⁵ (which already included all large European wine producers) accounted for 80% of the value of wine exports in 1988. This dropped to more than 50% by 2014 (p. 38). Will it decline further by 2025? That is what Chapter 18 on projections tries to figure out. Asian, especially Chinese, consumption and imports will continue to increase dramatically.⁸ While its import volume will increase by a mere 9%, its dollar value will go up by a staggering 50% given the switch from non-premium to commercial-premium and fine wines. That looks good for producers, less so for me as a consumer. Brexit will make it even more terrible for the United Kingdom than for me, as its wine imports will decrease by one billion dollars (p. 505). They will have to go back to Scotch, unless Scotland decides to remain in the EU. If so, England's consumers will be left with their bubbly or sparkling wine, water, and pale ale.

Let me now get to the largest part of the volume, with its 15 chapters devoted to almost all producing regions or countries. The chapters are constructed along similar lines, and describe historical facts or events that changed the course of wine production: Phylloxera, disruptions during wars, local or more global public interventions such as those imposed by domestic regulations, or on all EU countries by the European Commission, the use of excise duties and tariffs to limit imports, but also the carbon footprints that vine and wine experts leave during their flights across continents while winemakers try to go biological. The chapters summarize detailed data on production, domestic consumption, exports, yields, comparisons with other alcoholic beverages, and future prospects. As some national borders have changed since 1835, contributors used current boundaries and amended data accordingly. My cherry picking across these 15 chapters had me dropping small wine-producing countries (whose share never exceeded 5% over the 1835–2014 period, including even Germany), and focusing on the three large producers (France, Italy, and Spain) and one large consumer (Britain).

France is the country that lost most in global production volume share (from more than 40% in 1860–1864 and 1930–1934 to 17% in 2014)—partly as a consequence of losing in 1962 part of “its country,” namely Algeria. Italy lost much less (it went from 20 to 16%), and Spain stayed put at 14%. France used to produce, trade, and drink the finest wines (Bordeaux and Burgundies were classified in 1855 and in 1861, respectively), but it recently became much challenged by the New World. It is also the country that increased the unit value of its wine exports by 700% (in nominal U.S.\$) while Italy, Australia, Argentina, the United States and especially Spain were far behind (p. 80). Even though France's annual per capita consumption has halved since 1975, it is still around 50 liters.

During the late 19th century, Italian wine (and by-products) represented 21% of the gross value of Italy's agricultural output, while wheat represented only 20%,

⁸ Asian grape wine consumption grew 50-fold between the 1960s and the early 2010s (p. 480).

and wine's share of GDP and of private consumption amounted to 8.6 and 11.6%, respectively. "Conventional wisdom suggests that Italian wine in the 19th century was quite bad because most consumers were interested only in getting as much alcohol as possible at the lowest possible price" (p. 139). In 1938, "quality wine" represented only 4.5% of the 3.4 billion of liters produced (p. 145). This volume doubled between 1946 and 1980 (p. 153) with half of the output being exported. Yields went from 500 liters/ha to 3,000, yet quality increased, and Angelo Gaja's as well as Sassicaia wines may beat many French Bordeaux in blind tastings.

Spain's international position benefitted from the havoc created by phylloxera in France in the mid-19th century, although until 1980 "most of the focus was on output of ordinary wines for the domestic market" (p. 208). Exports went to wine-bankrupt France (81%) and to Latin America, while 80% of sherry was sold in Britain. The numbers are really impressive: Spanish wine production increased by 500% between 1871 and 1895, and dropped to its 1871 level in 1906–1910 in the aftermath of the phylloxera outbreak that subsequently plagued Spain. The Pyrenees were obviously not high enough to prevent exporting Spanish wine and importing the French bug. New production technologies were introduced 30 years later than in France, during the early 1980s, and then Spain's accession to the EU allowed her to quadruple her bulk-wine exports between 1992 and 2014. Even though quality increased, prices remained low in Spain in comparison with other European countries.

I knew that some wine was produced in Canada, Upstate New York, and even in New Jersey zip code 08360, but I was very eager to learn something about the United Kingdom. The British Isles indeed produced a few grapes in medieval times and in the very early 1500s, and tried again during the late 1900s. I was nevertheless relieved to read that both Ireland and the United Kingdom "have always been dependent on imports of wine" (p. 239). During a couple of seconds, I thought indeed that maybe Ricardo had peddled fake news with his theory of comparative advantages of England producing cloth and Portugal producing wine. No, Ricardo was right, and I was happy to learn that its wine consumption dramatically increased from two to 20 liters per head between 1835 and 2015.⁹ Still, I am not sure whether Portugal buys lots of Burberry's pure wool coats. The fact is that the author of the chapter did not have to spend much time on production and export statistics. He instead delved more into history and nice anecdotes, including the following one: "The forty-year period of almost continuous war from 1775 until 1815 witnessed a dramatic increase, if not even a historical apex, in British elite and middling male drunkenness... Even if statistical evidence of heavy drinking is ambiguous, anecdotal evidence is overwhelming. Stupor from alcohol was positively fashionable. 'Drunk as a Lord' [became] a socially charged phrase... and the hard-drinking aristocracy and gentry surpassed even their own formidable standards" (pp. 253–254).

⁹This is what happened to me as well, though I started much later than in 1835.

Chapter 10 brings us to Georgia (the former Soviet republic that lies in the Caucasus) where wine started, and spread to the Levant, Egypt, and Ancient Greece some 2,500 years B.C., or even long before (see Phillips, 2017), since there is some evidence that wine was transported “down the Tigris and Euphrates rivers to Babylon and to the kings of Egypt before 3,100 B.C.” (p. 273). The chapter also discusses countries such as modern Greece, Hungary, Romania, Turkey, and Russia, among others. Surprisingly, their world export volume reached 17% during the 1970s and 1980s, but decreased to 6 or 7% more recently.

Chapters 11 to 17 deal with “newer markets”: Argentina, the 6th largest producer in the world; New Zealand and Australia, which started as a prison for Britain in 1788, at about the time British Lords started to become heavy drinkers, but became more reasonable and today grows Penfolds’ Grange; Chile, where the first grapevines arrived 475 years ago; South Africa, the 7th largest world producer; the United States, where the wine industry “is new by Old World standards, but old by New World standards” (p. 410); Morocco, Tunisia, and Algeria, the largest world exporter (in fact, to France) of wine in 1960. Finally, Asia and especially China, which, although it was in contact with Europe a very long time ago, was a very small wine player. Recently it not only started producing wine, but also importing especially “ultra-premium wines for gift-giving and banqueting. A love affair with Bordeaux...” (p. 470). The share in the global value of wine imports by China and other Asian countries increased from 2% in the early 1980s to 12% in 2012–2014. It became the fifth largest world importer, and is probably not going to leave it at that.

I am certain that Kym, Vicente, and all other contributors know this rubaiyat by the Persian poet Omar Khayyam: “Drink wine. This is life eternal. This is all that youth will give you. It is the season for wine, roses and drunken friends. Be happy for this moment. This moment is your life.” I hope they are still going strong, and will not stop (drinking, or writing, that is the question). The work they did and their volume is really very impressive. Though much has been published on some individual countries, what they have achieved here is a fully integrated view of what happened during the last two centuries in all wine-producing and wine-consuming countries.

I still have a couple of wishes for the next (and hopefully extended) edition. Each country chapter could have referred to other chapters a little more often; this would have avoided repeating things. Global warming and its influence on grape varieties and the competition between wine regions should be given some consideration.¹⁰ And, though I am far from being fanatic, something could have been said about the 1,500 to 2,000 organic and bio wines that are produced today, of which more than 800 are in France alone.

¹⁰In the meantime, you could have a look at Anderson (2017).

Finally, while reading this volume, I also had on my desk Phillips' (2017) book *9000 Years of Wine*. Kym and Vicente carried data back to 1835, but there is still some way to go before reaching the year 6,992 B.C.

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RUDI GOLDMAN (Director/Producer): *Burgundy: People with a Passion for Wine*. Media in English/Rudi Goldman Productions, Amsterdam, 2017, 60 min, DVD NTSC Format, all Regions, \$19.95.

The best documentaries—on any subject—are informative, entertaining, and even touching. Think of Ken Burns’s PBS series, *The Civil War*, or—in the realm of oenonomy—Jason Wise’s *Somm* (reviewed, volume 8, 2013, pp. 238–241). Rudi Goldman’s new film, *Burgundy: People with a Passion for Wine*, meets at least the first two requirements, which are necessary, if not sufficient conditions for documentary film excellence.

Goldman’s film surpasses another recent documentary about the Burgundy wine scene, David Kennard’s *A Year in Burgundy* (reviewed, volume 9, 2014, pp. 100–103). Both offer high-quality cinematography, beautiful to view from a Blu-ray disc on a large-format, high-definition display. But whereas Kennard employed a ponderous narrator to tell his viewers what to think, Wise and now Goldman trust their respective audiences to come to their own conclusions, stimulated by the pictorial, musical, and verbal inspiration the films provide.

One reason we do not miss the presence of a narrator in *Burgundy* is that several of the film’s dozen talking heads—all winemakers *and* wine lovers—are both articulate and insightful. It is fortuitous that we can benefit repeatedly from the thoughts of an American, Alex Gambal, who left the world of real estate decades ago to explore Burgundy, and after attending the adult viticultural school in Beaune, launched Maison Alex Gambal in 1997. His Pinot Noir grapes range from those sourced from Grand Cru vineyards in Charmes-Chambertin and Batard-Montrachet, to Premier Cru, and more modest Communal and Regional bottlings.

In a striking segment that will be of particular interest to readers of this *Journal*, Gambal describes what he calls “the irony” of Burgundy. Only two cépages may be grown and vinified in the region—Pinot Noir and Chardonnay; and the Appellation d’Origine Contrôlée (AOC) rules on planting, growing, harvesting, vinification, and bottling are exceptionally severe. Yet, these constraints, this discipline leads to the production of celebrated products—the Grand Cru and Premier Cru wines of Burgundy.

We are reminded of the discipline that is provided by a musical form, such as a Baroque trio sonata (or—for that matter—by an academic discipline, which may