

Clink Different  
EXPERIENCE THE  
WINES of EUROPE.

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# Bordeaux's best kept secret – Dry White Bordeaux

**SWE Conference 2019**



CAMPAIGN FINANCED  
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BORDEAUX



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# Agenda

- The *Clink Different* Campaign
- Bordeaux Key Facts & Market Position
- Deep Dive - Dry White Bordeaux
  - History and evolution
  - Diversity of styles
- Tasting
  - Analysis of terroir and winemaking influence
- Consider: Positioning, Market Potential, Challenges

# Bordeaux key facts

277,250 acres of vineyard

65 Appellations

Diverse Wine Styles:  
Red, Dry White, Rosé, Sweet White, Sparkling

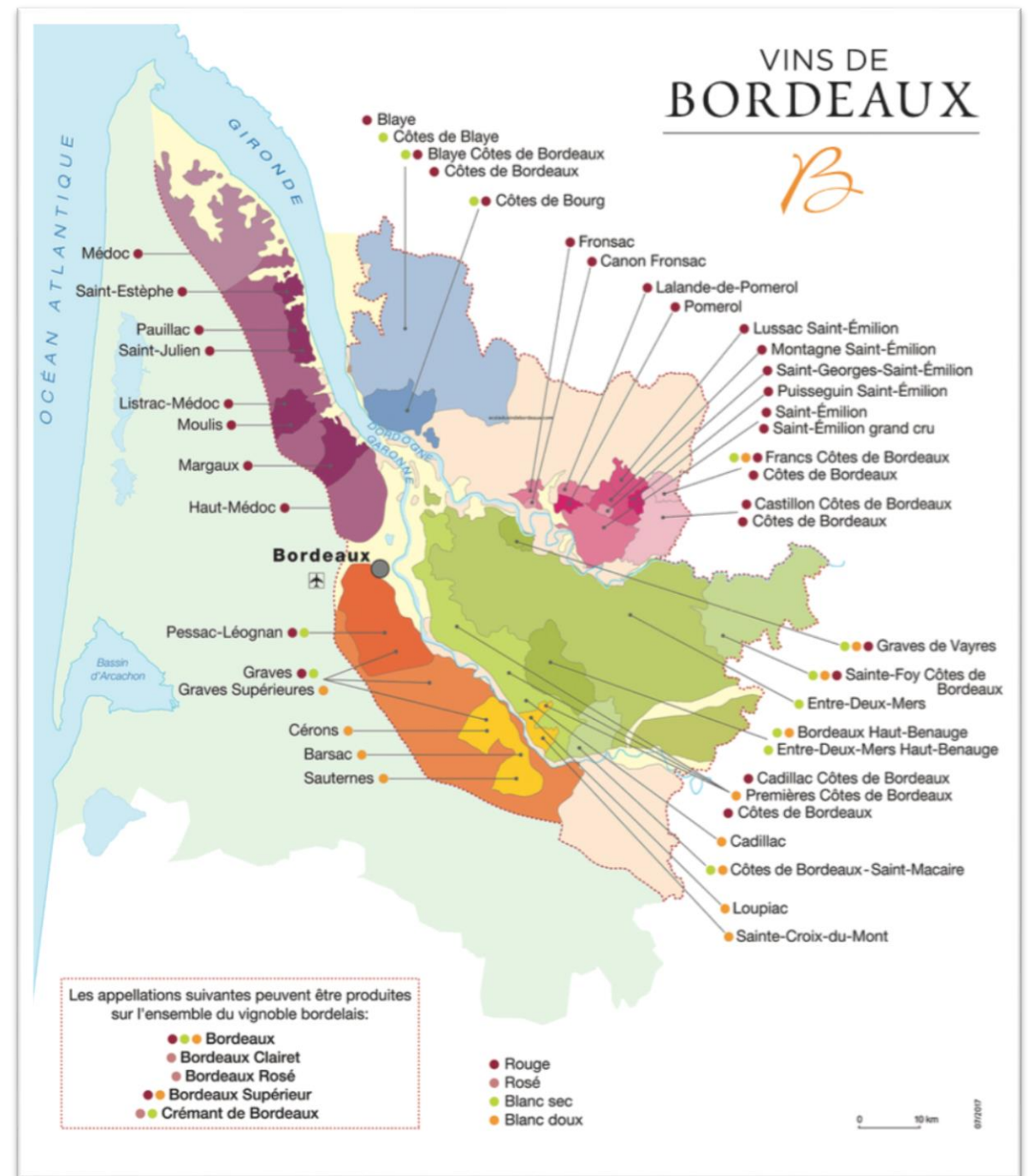
Average Production = 56 million cases

5800 Winegrowers

300 Merchants

76 Brokers

29 Cooperatives (in 3 co-op unions)



# Bordeaux production

**Was 10.2% in 2018**



Production of sparkling (Crémant de Bordeaux) has almost quadrupled since 2012

Now = 1% of all Bordeaux production.


# BORDEAUX WINE SALES – Jan-Dec 2018

## Volume

1. China
2. **USA**
3. Belgium
4. UK
5. Germany
6. Japan

## Value

1. Hong Kong
2. China
3. **USA**
4. UK
5. Germany
6. Belgium



USA = #1 export market for dry whites by value and #2 (by just a sliver) by volume

56% Sales in France  
44% Exports

# BORDEAUX today – what's changing

- Young generation winegrowers – well traveled, less formal - FUN
- Red wines – brighter, fresher, more supple and ready to drink earlier – but can still age

*“I take my hat off to the skill of Bordeaux’s best winemakers (and academic oenologists). The wines made in this second decade of the 21st century suggest that the problem of how to make red Bordeaux that will drink well both young and old has been solved.”*  
*Jancis Robinson, MW, OBE (Financial Times, Nov 2018)*

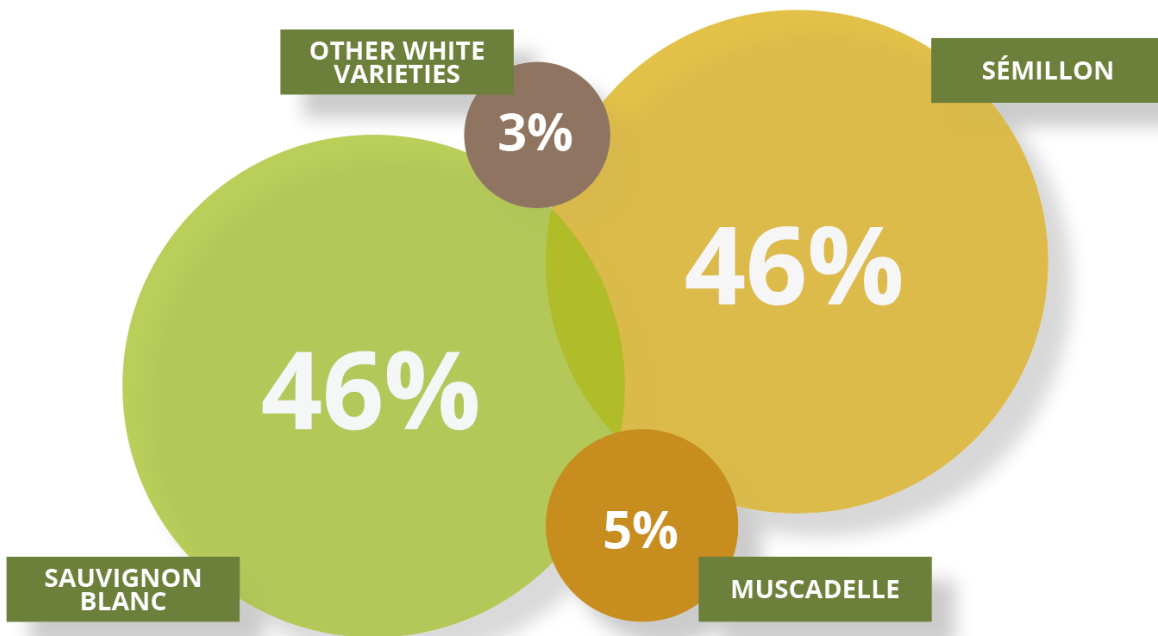
- **Dry whites – growing, more diverse and exciting than ever**
- More curiosity and innovation - yet respecting tradition and heritage - return to elegance, re-focus on vineyard, climate change initiatives
- Sustainability – organic, biodynamic – environmentally conscious

DRY WHITE BORDEAUX

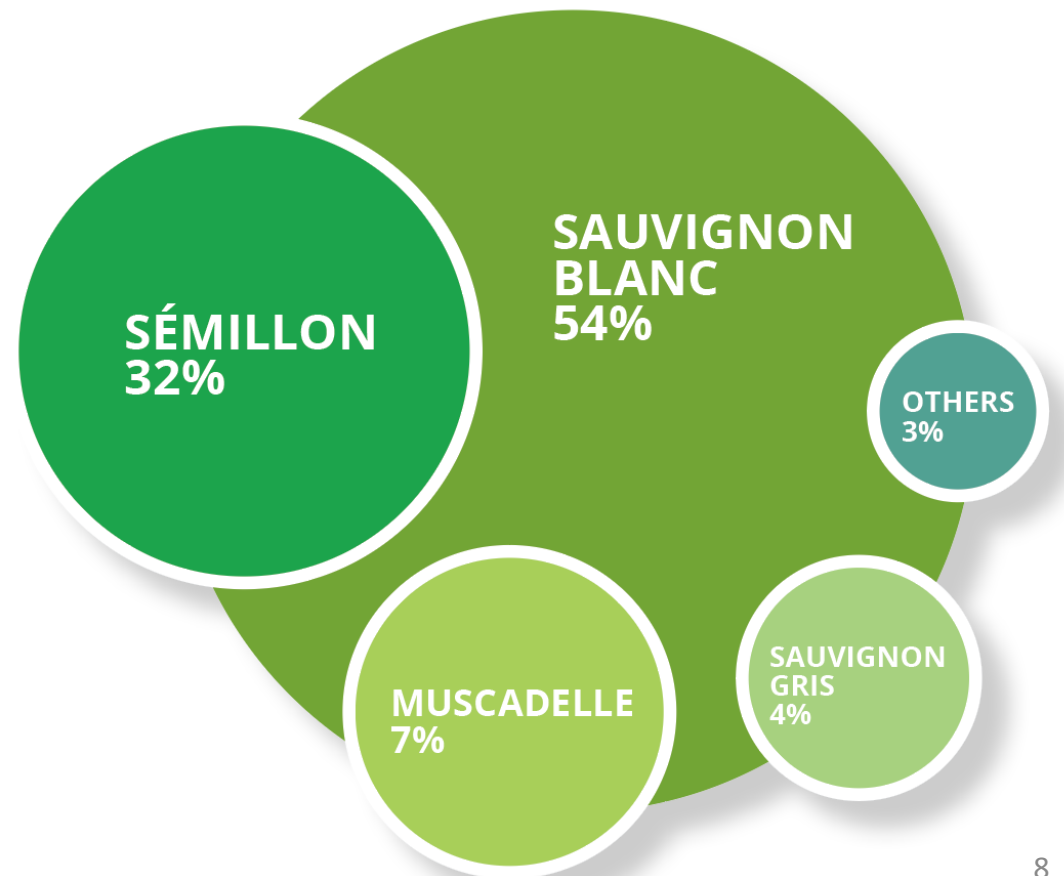
# BORDEAUX – WHITE PLANTED VARIETIES

## 11% OF THE TOTAL VINEYARD AREA

SURFACE AREA BY WHITE GRAPE VARIETY:

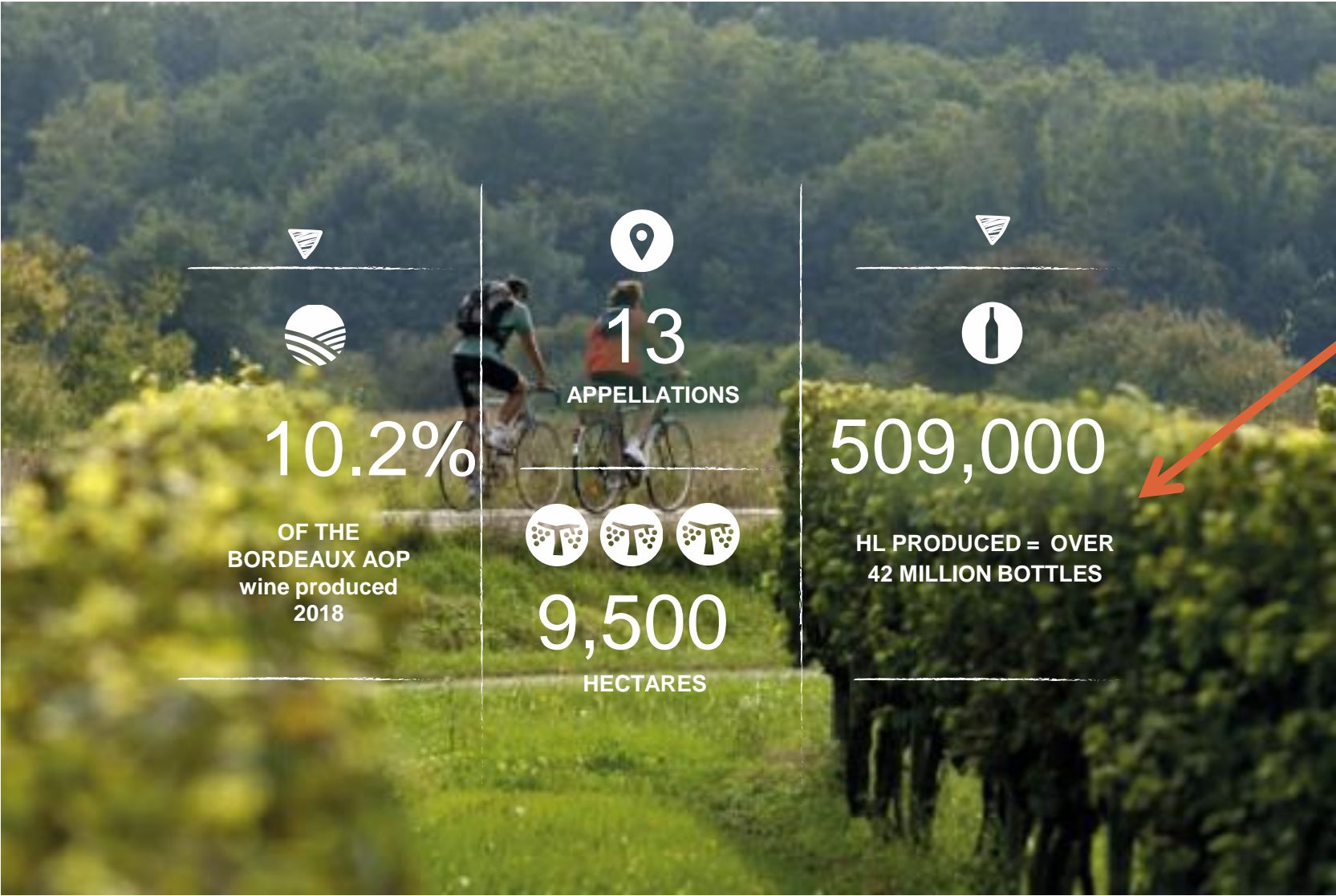


MAIN GRAPE VARIETIES FOR DRY WHITE BORDEAUX:





# Dry whites Key figures 2018



Up from 318,000 hl in 2017 due to frost



# 13 appellations



- 1 Blaye Côtes de Bordeaux
- 2 Bordeaux Blanc
- 3 Bordeaux Haut-Benauge
- 4 Côtes de Bordeaux-Saint-Macaire
- 5 Côtes de Bourg/Bourg/Bourgeais
- 6 Crémant de Bordeaux
- 7 Entre-Deux-Mers
- 8 Entre-Deux-Mers Haut-Benauge
- 9 Francs Côtes de Bordeaux
- 10 Graves
- 11 Graves de Vayres
- 12 Pessac-Léognan
- 13 Sainte-Foy Côtes de Bordeaux

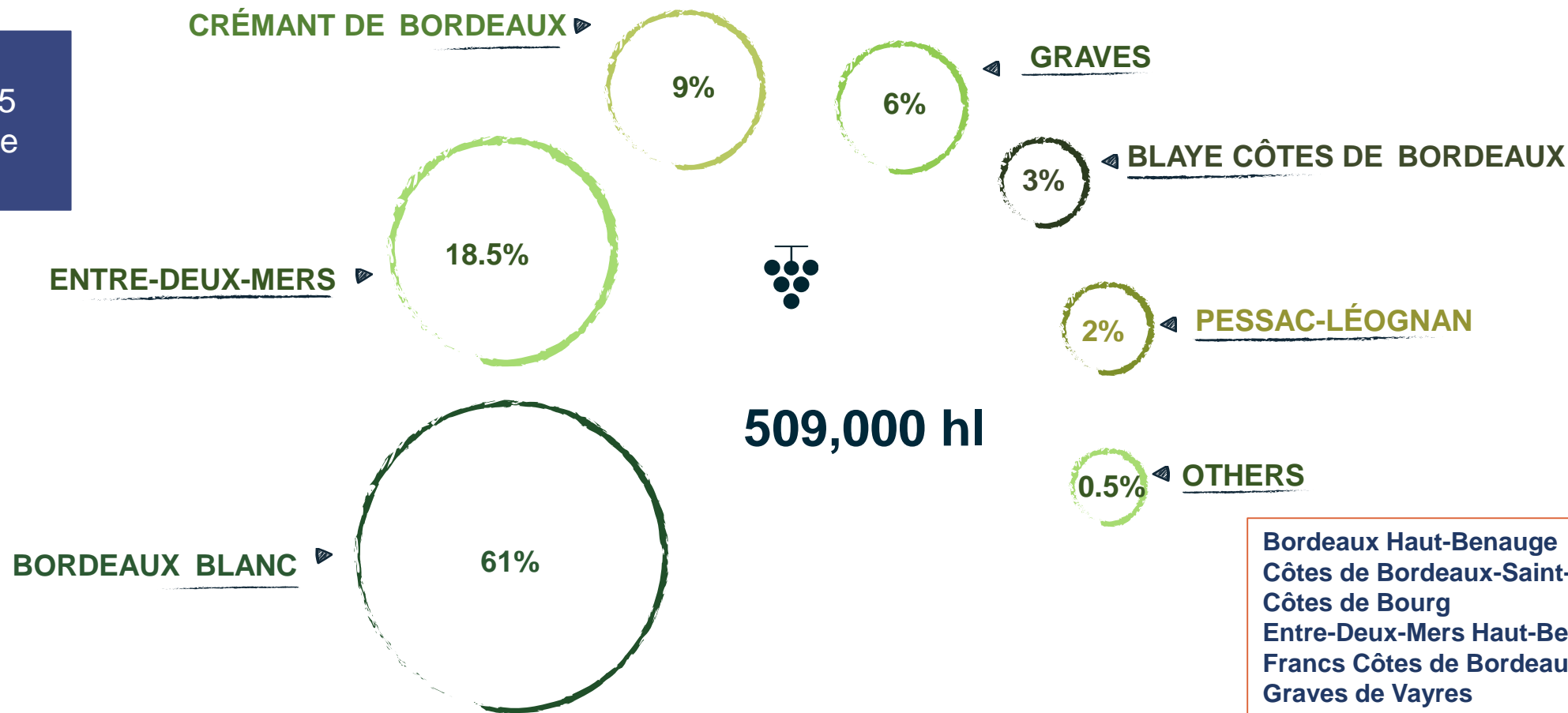
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*Please note:*

*The Bordeaux and Crémant de Bordeaux appellations are produced throughout the Bordeaux region.*

# BREAKDOWN OF APPELLATIONS (2018 dry white production by volume)

Crémant has increased X 3.5 production since 2012



Q: What factors shaped the major shifts in dry white wine production in Bordeaux?

# BORDEAUX & WHITE WINE: A LONG-STANDING HISTORY

## 18<sup>th</sup> century

Exports to **Holland** for the production of brandy

## 1950s

**60%** of Bordeaux production

Due to the 1956 frost, a majority of vineyards were replanted with red wine varieties (consumer demand, terroir, etc.)

## 2006

**8%** of Bordeaux production

## 2015-2018

**9% - 10%** of Bordeaux production

**USA #1 Market** by Value





## 1990s

Discovery of molecules responsible for the characteristic aromas of Sauvignon Blanc (Prof. Dubourdieu)

Identification of viticultural and winemaking techniques for producing **high-quality white wines**



# SAUVIGNON BLANC PRECURSORS & CHARACTERISTIC AROMAS

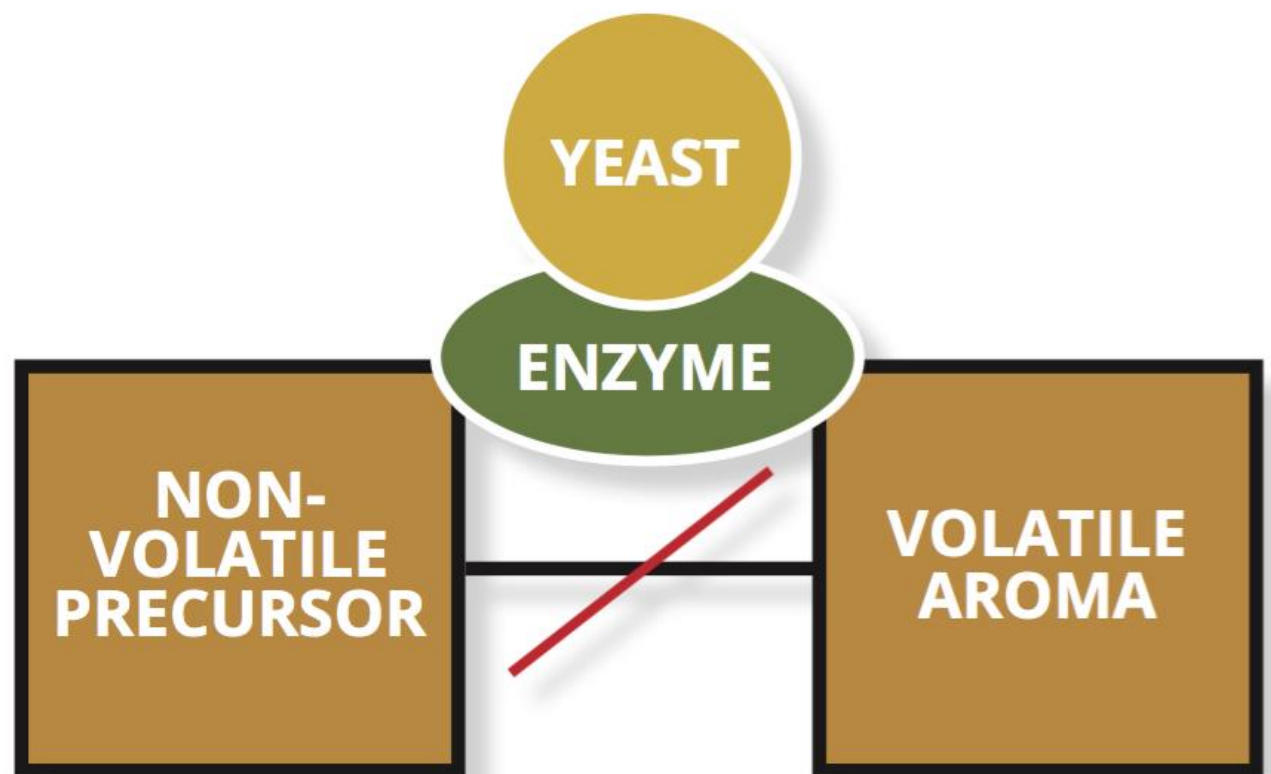
Molecule	Associated Characteristics
4-mercapto-4 methyl-pentan-2 one (4MMP)	<ul style="list-style-type: none"> <li>• Box</li> <li>• Broom blossom</li> </ul> 
3-mercapto-hexan-1-ol acetate (A3MH)	<ul style="list-style-type: none"> <li>• Blackcurrant</li> <li>• Grapefruit</li> <li>• Passion fruit</li> </ul> 
4-mercapto-4 méthyl-pentan-2-ol (4MMPOH)	<ul style="list-style-type: none"> <li>• Lemon peel</li> </ul> 
3-mercaptohexan-1ol (3MH)	<ul style="list-style-type: none"> <li>• Grapefruit</li> <li>• Passion fruit</li> </ul> 

**Role of Professor Denis DUBOURDIEU**

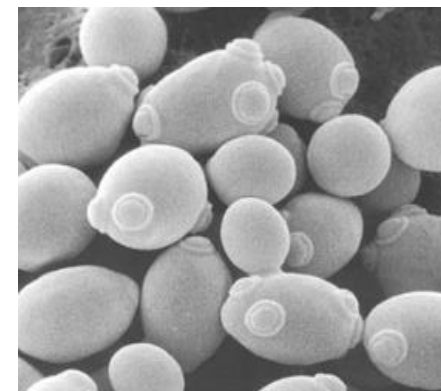
**Identification of the compounds responsible for creating the characteristic aromas of the Sauvignon Blanc variety**

# SAUVIGNON BLANC CHARACTERISTIC AROMAS

Origin and formation of molecules responsible for creating aromas



- These molecules exist in the form of **non-volatile precursors** found in the grapes and therefore in the musts.
- Molecules become volatile with the interaction of a specific **enzyme**.



Q: What characteristics do the different varieties bring to each styles?



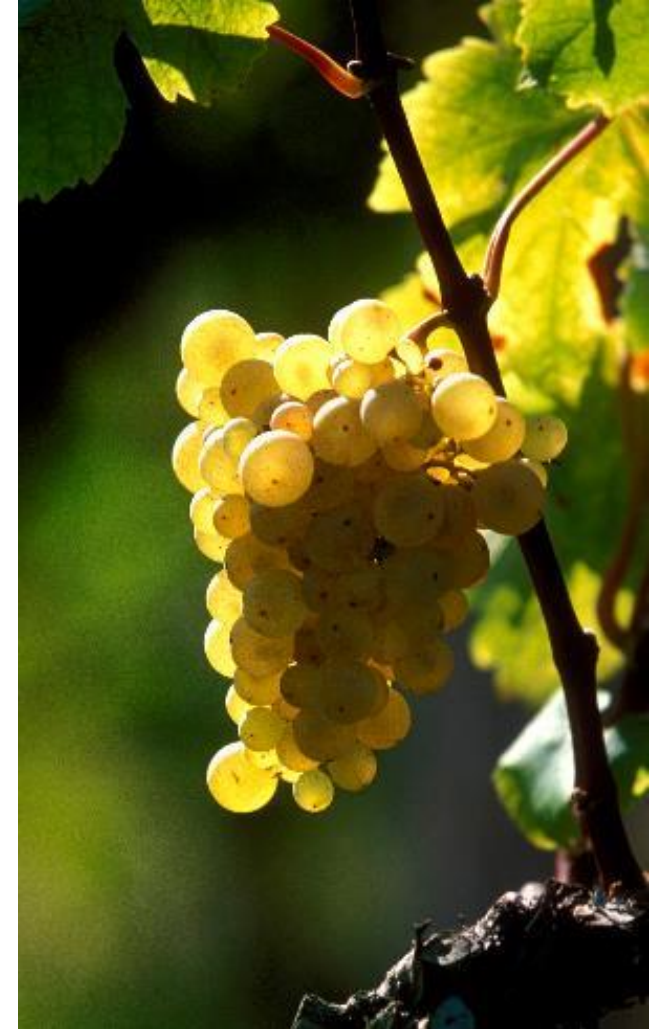
# CHARACTERISTICS OF SAUVIGNON BLANC

- ✓ Early ripening grape variety (1 or 2 weeks before Sémillon).
- ✓ Relatively **high acidity**. Intensely **aromatic**.
- ✓ **Likes a mild climate with sunny summers** but not too much heat that could alter its **aromatic potential**.
- ✓ Likes **cool limestone** or **clayey soils**. Less expressive if water stress is too strong or too early (i.e does not like too much heat or too dry soils).
- ✓ Most unoaked but often barrel fermented and aged to produce great dry white wines that are **powerful and complex**.



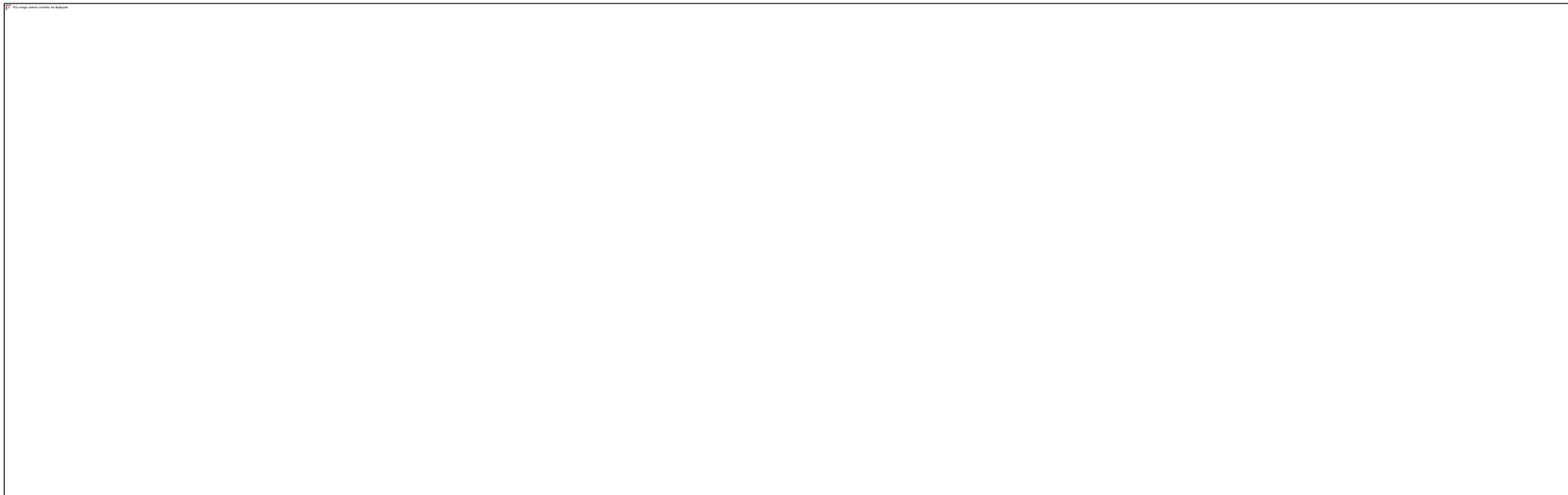
# CHARACTERISTICS OF SÉMILLON

- ✓ Ripens later than Sauvignon Blanc - at the same time as Merlot in Bordeaux.
- ✓ Particularly **productive variety** (yields limited by pruning).
- ✓ Likes well-drained **clay gravel** or **limestone soil**.
- ✓ Less acidity than Sauvignon Blanc.
- ✓ Adds **mouthfeel** and **texture**.
- ✓ Adds **aging potential**.
- ✓ Almost always **blended** but occasionally varietal



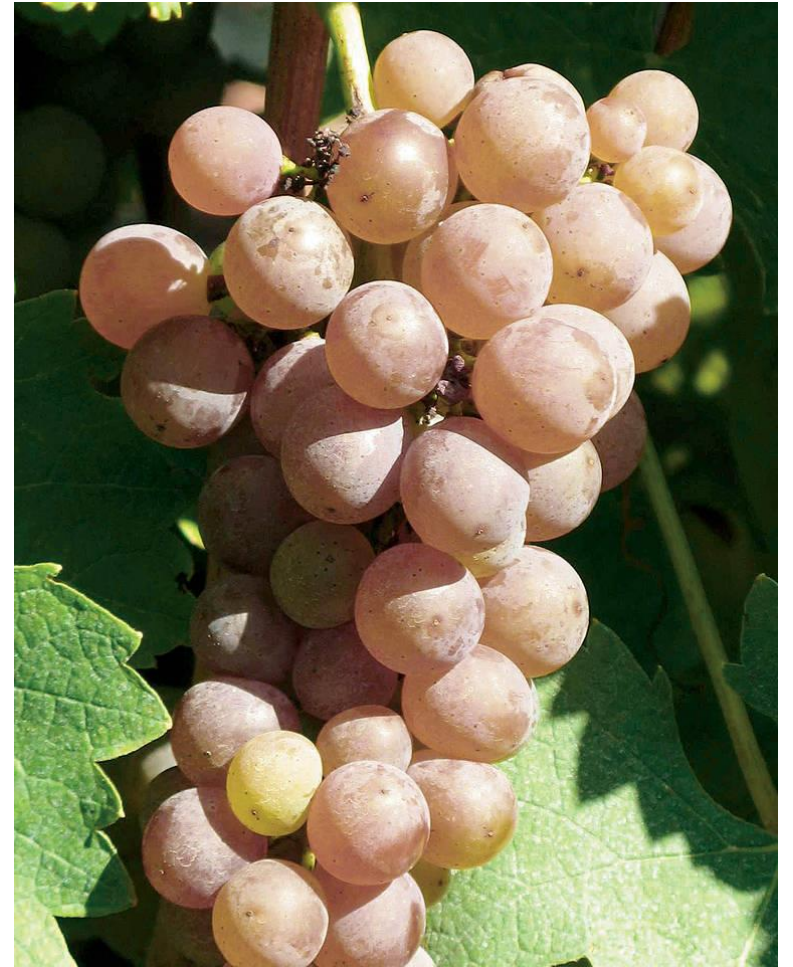
# CHARACTERISTICS OF MUSCADELLE

- ✓ **Delicate aromas** (floral, grapey with hints of muscat).
- ✓ Muscadelle is **less planted** due to its viticultural challenges.
- ✓ Very late ripening grape, susceptible to botrytis.
- ✓ Typically Muscadelle is an **additional grape variety** in dry white wine blends – circa 2%-10%

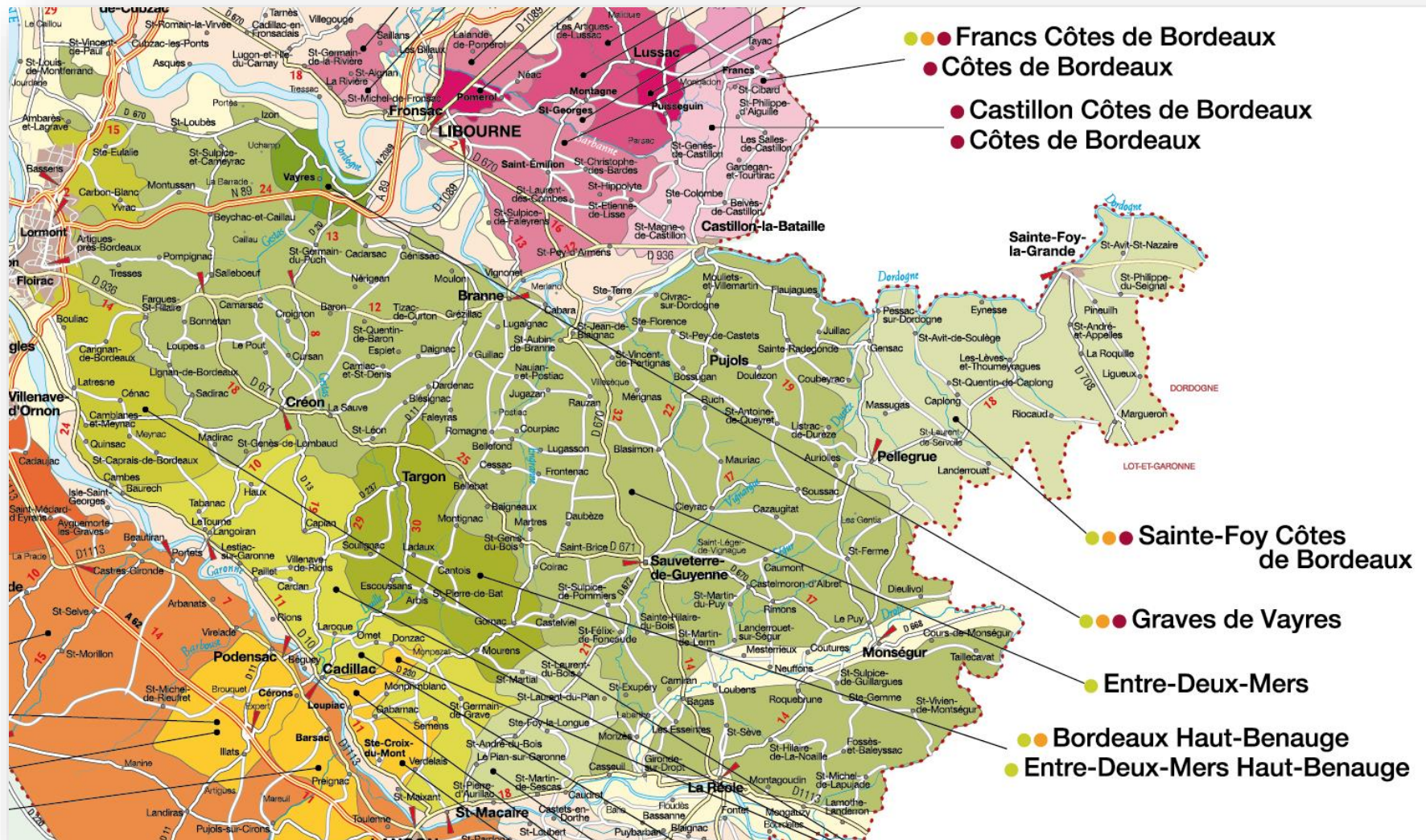


# CHARACTERISTICS OF SAUVIGNON GRIS

- ✓ Pink-berried **mutation** of Sauvignon Blanc
- ✓ **Earlier ripening** than Sauvignon Blanc.
- ✓ Likes cooler soils than Sauvignon Blanc
- ✓ **Thick skinned** variety with a **slightly pink hue** when ripe.
- ✓ Low yielding
- ✓ Aromas of flowers, melon, mango and spice
- ✓ **Lower acidity** than Sauvignon Blanc.
- ✓ High in sugars
- ✓ More **voluptuous, weightier** than Sauvignon Blanc
- ✓ **Usually used as a minor blending** component.



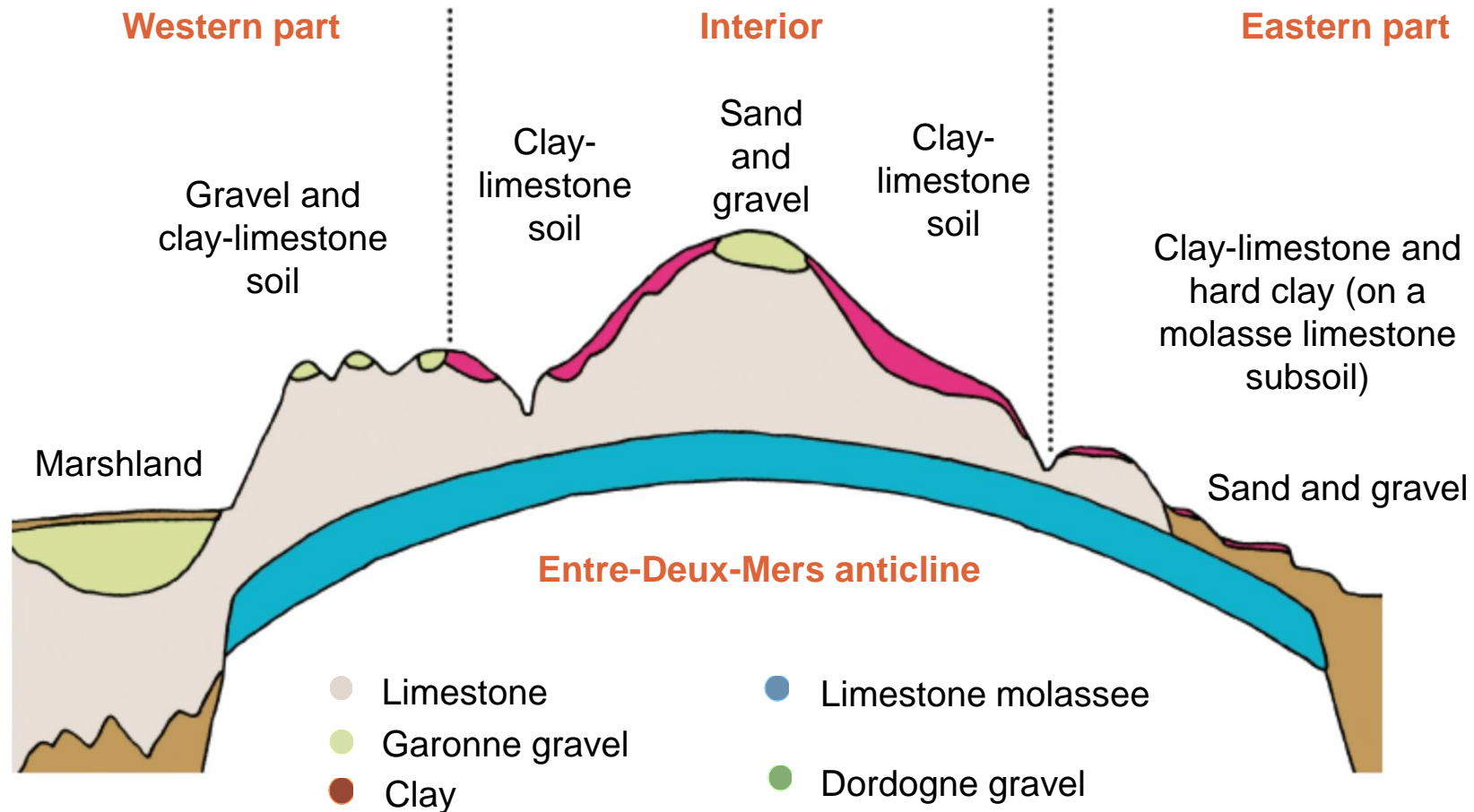
# The classic terroirs and soils for dry white Bordeaux



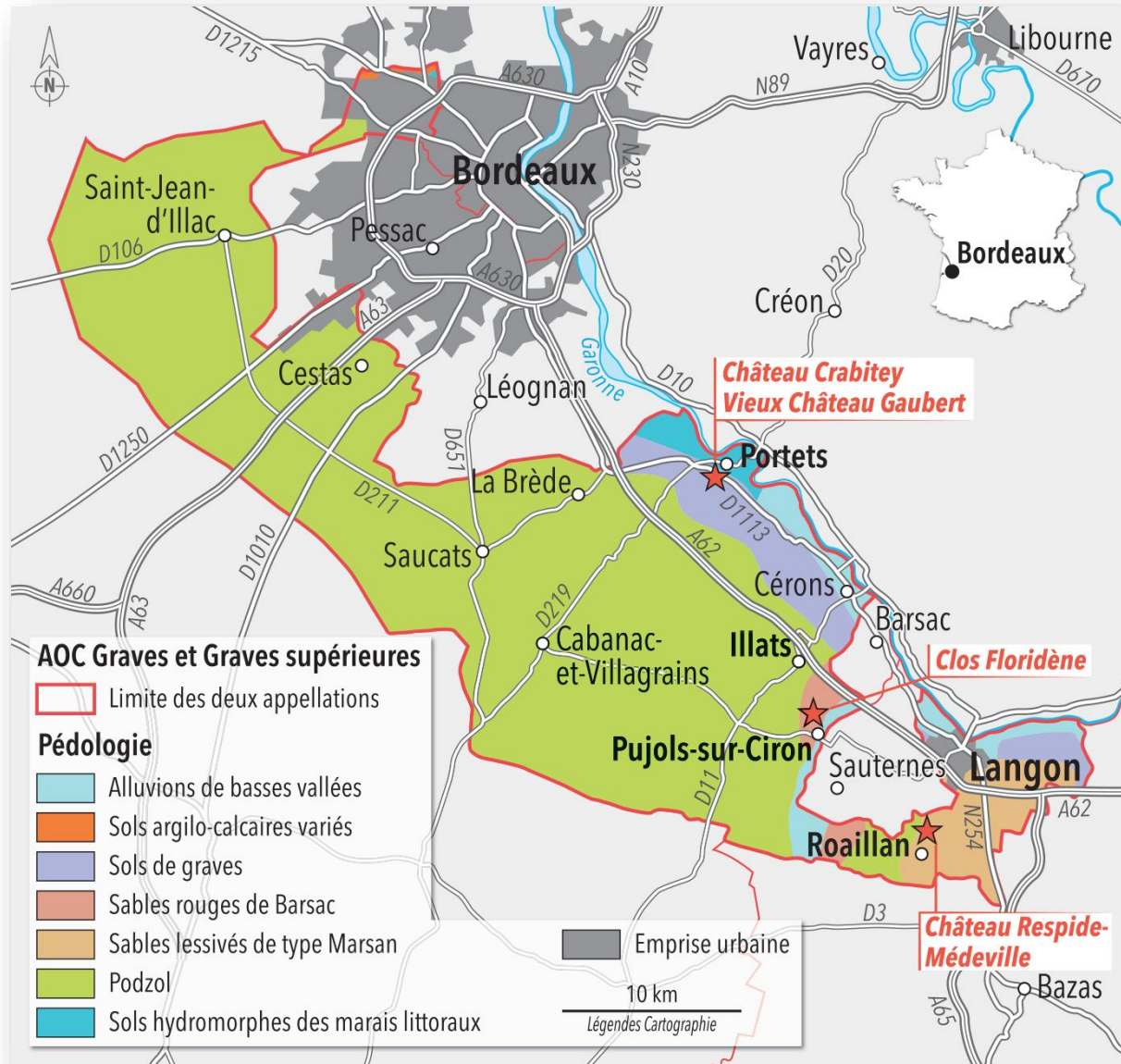
## ENTRE-DEUX-MERS

- Large area between the Garonne and the Dordogne rivers
- An appellation
- A geographical area that includes other appellations
- Diverse area with diverse terroirs

# DIVERSITY OF SOILS IN ENTRE-DEUX-MERS



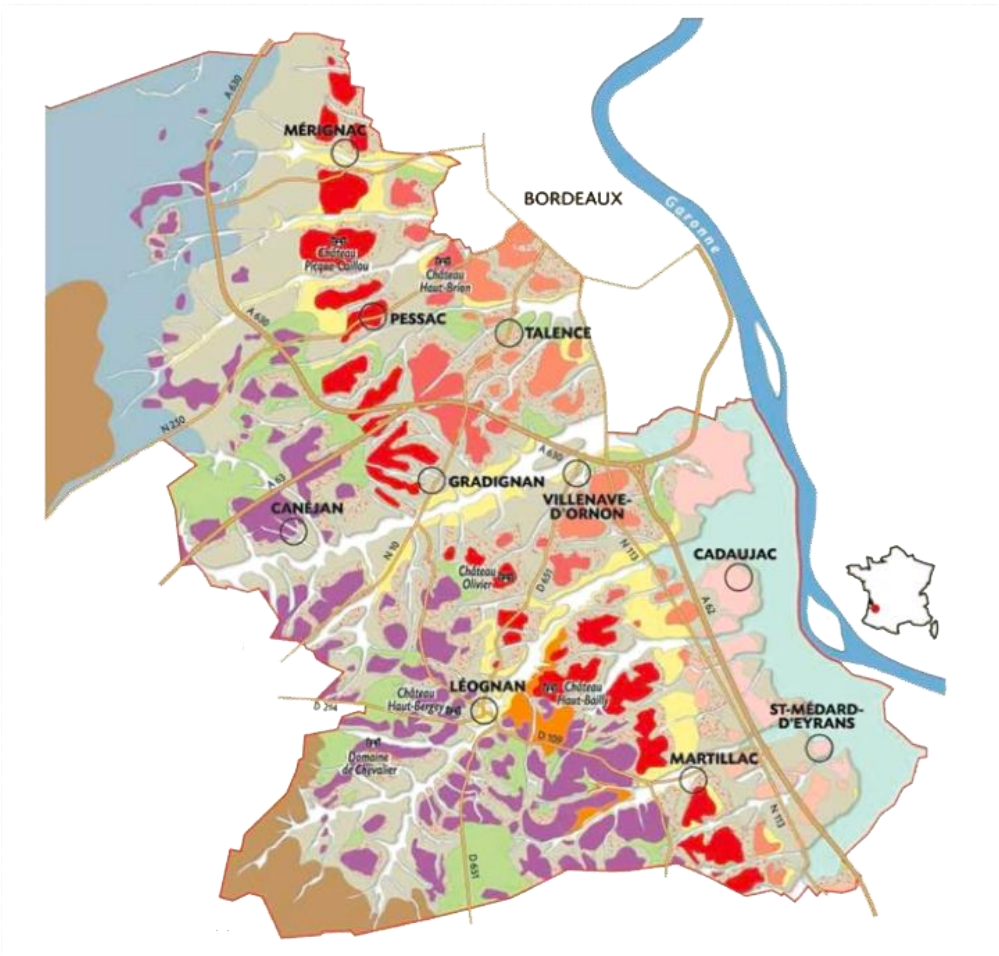
# GRAVES – DIVERSITY OF SOILS



- 55 km long and 10 km wide
- Geological formations similar to Medoc
  - system of terraces extending inland from the river
- Less surface clay in Graves than Medoc
  - ≈ wines typically lighter and less tannic.
- North south difference also exists in Graves – wines in northern Graves more tannic than southern graves.
- Vineyard quality dependent on which terrace it is situated as well as presence of gravel mounds (compact gravels & fine clay)
- Gravels with clay limestone
- Lower slopes – more sandy gravels
- Sémillon the dominant white in Graves (BUT Sauvignon Blanc dominant in Pessac for whites)



# DIVERSITY OF SOILS: PESSAC-LÉOGNAN



— Boundary of the Pessac-Léognan appellation

## Lithological legend

- Marshland and alluvial soil along the Garonne River
- Valley floors and natural drainage outlets
- Landes sand
- gravelly colluvial sand
- Colluvial sand
- Variegated clay
- Type 6 gravel
- Type 5 gravel (very sandy facies)
- Type 4 gravel
- Type 3 gravel
- Type 2 gravel
- Type 1 gravel
- Ancient alluvial water tables (clay with gravelly interlayers)
- Limestone bedrock
- Tawny sand

Let's taste

# 1. Château Sainte-Marie “Reserve”, 2017, Entre-Deux-Mers

- Appellation: Entre-Deux-Mers
- Location: Near town of Targon
- Family estate (Stéphane DUPUCH)
- Soils: Clay-limestone soils – fossilized – high elevation 70m above sea level
- Vinification: Pre-fermentation maceration (10-15°C), stainless steel fermentation, short aging on lees in INOX – unoaked
- Blend: 70% Sauvignon Blanc, 25% Sémillon, 5% Muscadelle
- Old vines that survived the 1957 frost



## 2. Château Couronneau, 2018, Bordeaux Blanc

- Appellation: Bordeaux Blanc
- Location: In Sainte Foy, Côtes de Bordeaux – village of Targon
- Family estate (Christophe PIAT)
- Soils: Clay-limestone soils – fossilized – high elevation 180m – steep slope
- Viticulture: Certified Biodynamic
- Vinification: Pre-fermentation maceration (10-15°C), Co-fermented in stainless steel fermentation, short aging on lees in INOX, some stirring - unoaked
- Blend: 50% Sauvignon Blanc, 50% Sauvignon Gris



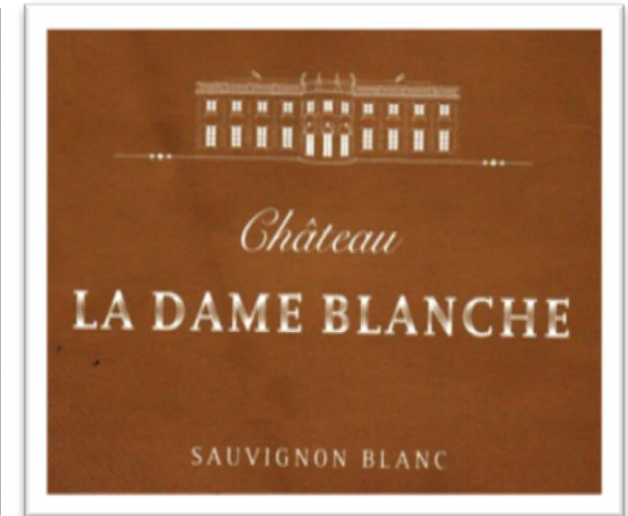
### 3. Château Peybonhomme-Les-Tours “Le Blanc Bonhomme”, 2018, Blaye, Côtes de Bordeaux

- Location: Village of Cars, Blaye
- Family owned estate: Hubert Family - Catherine, Jean-Luc, Rachel & Guillaume
- Blend: 50% Sauvignon Blanc, 50% Sémillon
- Soil: Limestone clay
- Viti: biodynamic since 2000, double Guyot pruning, spontaneous winter grass cover, soil tillage during the spring. Treatments combining small quantities of Bordeaux mixture with herbal teas - horsetail or nettle.
- Fermentation Native yeast native . 40% fermented in new barrels, remainder in concrete vats.
- Maturation for six months with regular lees stirring. Slight sulfur additions - total SO<sub>2</sub>: 35 mg/l. Bottled on a fruit day of the biodynamic calendar.
- Certification Organic, biodynamic, vegan.



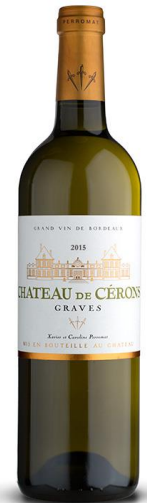
## 4. Château La Dame Blanche, 2017, Bordeaux Blanc

- Appellation: Bordeaux Blanc
- Location: Haut-Médoc (Le Taillon)
- Soil: Chalky-clay
- Blend: 100% Sauvignon Blanc
- Vinification: Lowish temperature alcoholic (16°C and 18°C) after 36 hours of settling. Ageing in stainless steel tanks on lees.
- Château du Taillan - family-run estate. – Cruse family - 5 sisters. They are the 5th generation of the long established Cruse family, who has owned the property since it was acquired by Henri Cruse in 1896.



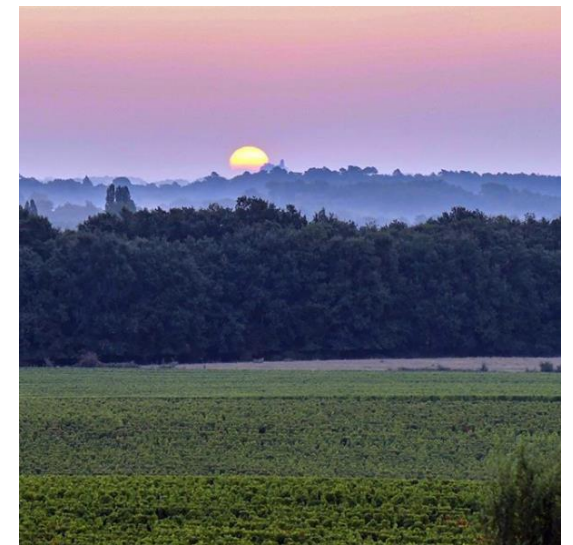
# 5. Château de Cérons, Blanc, 2016, Graves

- Location: Village of Cérons – listed 17<sup>th</sup> century house right in the village – walled vineyards
- Soil: 26 ha planted on plateau of gravel soil with a limestone subsoil.
- Viticulture: Sustainable and hand harvest
- Blend: 50% Sémillon, 45% Sauvignon Blanc, 5% Sauvignon Gris
- Vinification: Gravity fed and alcoholic fermentation in stainless steel . Aged on lees for about 2 months
- Château de Cérons is a family-run estate - Caroline and Xavier Perromat. In family for many generations
- Caroline and Xavier took over in 2012



## 6. Château Les Charmes-Godard, 2016, Francs, Côtes de Bordeaux

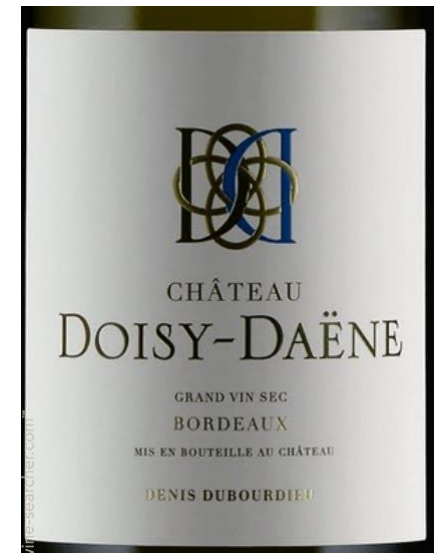
- Appellation: Francs, Côtes de Bordeaux (5.5 ha)
- Family owned - the Thienpont family – Nicolas and Cyrille
- Soils: Primarily limestone-clay soils with some loamy soils over marl subsoil
- Viticulture: Sustainable
- Viification: Fermented and aged in 500 liter barrels and left on the lees for six months – 15% new wood.
- Blend: 60% Sémillon, 25% Sauvignon Gris , 15% Sauvignon Blanc





## 7. Château Doisy-Daëne 'Sec', 2017, Bordeaux Blanc

- Location: Barsac, Southern Graves, 18.2 ha.
- Family owned - Dubourdieu family – Florence and her sons Jean Jacques & Fabrice
- Soils: Barsac plateau – Thin layer of clayey sands, known as "Barsac red sands", tops the chalky subsoil.
- Viticulture: Sustainable
- Viification: Once grapes ripe, a few bunches are collected on each vine from all Sauvignon plots. Some PFM. Vini in barrel (20% new) – maturation 8 month on lees with stirring
- Blend: 100% Sauvignon Blanc



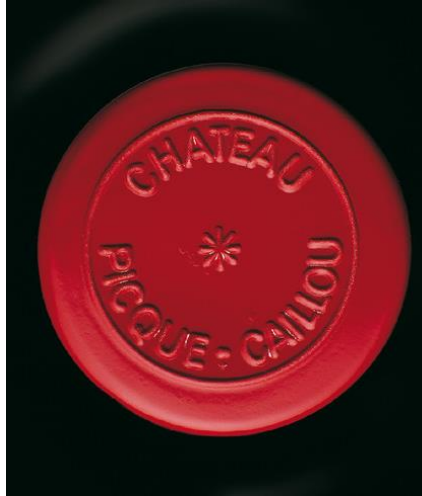
## 8. La Sémillante de Sigalas, 2013, Bordeaux Blanc

- Appellation: Bordeaux Blanc
- Location: Sauternes
- Soils: Siliceous-gravelly and clay
- Vinification: 9 months in French oak barrels “sur lies”
- Winegrower: Laure de Lambert Compeyrot
  - represents 6th generation at Sigalas Rabaud.
- Consultant: Jacques Lurton
- Blend: 100% Sémillon



## 9. Château Picque Caillou Blanc , 2017, Pessac-Léognan

- Location: Just outside Bordeaux city limit - Merignac – beside Haut Brion – 21 ha (2.7 with white varieties)
- Ownership – family owned Isabelle and Paulin Calvet
- Soils: Gunz type Pyrenean Gravels
- Viticulture: Sustainable, manual harvest
- Vinification: Barrel fermented, 20% new , aged 7 months on lees
- Blend: 70% Sauvignon Blanc, 30% Sémillon



# TWO GREAT BOOKEND STYLES

## .....BUT.....MORE



### Lively and fruity

(particularly Bordeaux Blanc, Entre-Deux-Mers, and Côtes de Bordeaux)

- Generally fermented and **aged in vat**
- Aromas: **lemon, grapefruit, and acacia blossom**
- Goes perfectly with: white meats, salads, seafood, grilled fish, and goat's cheese, or as an aperitif
- Aging potential: Best enjoyed young (1 - 3 years old)
- Best served at **7-9°C**
- **Without decanting**



### Structured and generous

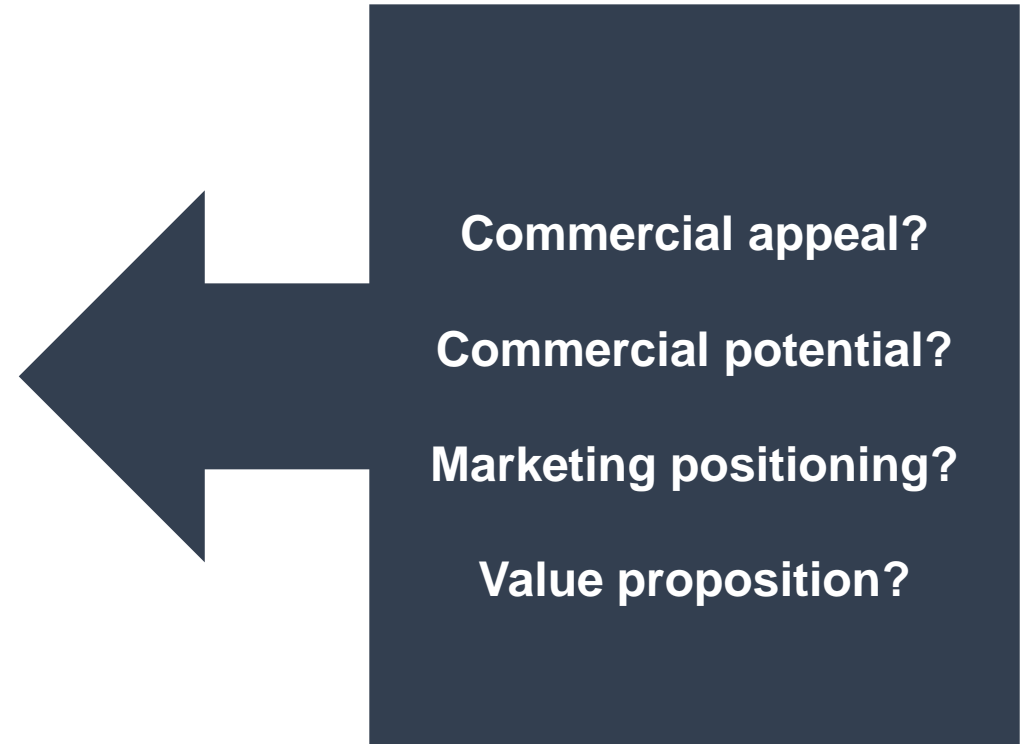
(particularly Graves and Pessac-Léognan)

- Often **partial or full barrel** fermentation and aging
- Aromas: **Boxwood, citrus and exotic fruit**
- Goes perfectly with: white meats, fish in a sauce, vegetable soup, and hard cheeses, or as an aperitif
- Aging potential: 5+ years
- Best served between **10 - 12°C**
- **Decant if necessary** (generally young wines) approximately 15 minutes before serving

Q: Market opportunity for dry white  
Bordeaux?

# DRY WHITE BORDEAUX: FINDING ITS PLACE IN THE MARKET

- **Grape Varieties**
  - Known / recognizable
- **Flavor profile**
  - Sauvignon Blanc fans
  - Sauvignon Blanc avoiders??
- **Styles – modern/ accessible?**
  - Unoaked / Oaked
  - Blend vs Varietal Sauvignon Blanc
  - Food friendliness
  - Price points
- **Price points**
  - \$10-\$15
  - \$15-\$25
  - \$25-\$50



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**THANK YOU**

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