

Unit 7 Diploma in World of Wine & Spirits

Thesis

“Grower Champagne; a new and lasting reality?”

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E I N A K A D E M I E

Ö S T E R R E I C H

“Grower Champagne; a new and lasting reality?”

Weinakademiker thesis
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1. Introduction

“Grower Champagne may be the most notable phenomenon in the Champagne world.”¹, so said Essi Avellan, Finland’s first Master of Wine and editor of the Fine Champagne Magazine. She spoke those words on the 26th of November 2014 at a Champagne tasting in London organised by the Institute of Masters of Wine. It was also the first time in the history of the Institute of Masters of Wine that a seminar was dedicated solely to Grower Champagnes.

Grower Champagnes are made by small, independent producers who grow their own grapes and bottle their own wines, therefore presenting regional, local and often even single vineyard expressions in their Champagne. Grower Champagnes are almost the polar opposite of the ‘Grandes Marques’ Champagnes (the big brands) whose Champagnes are mostly cross-regional blends, thereby lacking any single vineyard expression.

As a student of wine, sommelier, importer but above all Champagne lover, I would tend to agree with Avellan’s words. I have also noted an increase in the attention given to Grower Champagne as well as a rise of its popularity within the wine trade. The last time I visited the Champagne region (2014), I found that the Champagnes of some growers, such as Jacques Selosse, had obtained a near mythical status with corresponding scarcity and (high) prices. The fact that his cellars were burgled in 2013, with 8 pallets of Champagne stolen worth roughly €300.000,-, in a twisted way confirms the above.

However, we live in fickle times in which tastes and preferences seemingly change every day. What is hip and trendy today can easily be forgotten by tomorrow. All this made me wonder: is the rise of Grower Champagne just a trend or will this phenomenon become a lasting fixture of Champagne? This is the question I aim to answer in this thesis.

While researching the abovementioned question I will also study whether Grower Champagne has actually become more popular and dedicate chapters to the reason(s) for its popularity, what its future prospects may be and if the Grandes Marques have reacted to the aforementioned rise. To conclude this thesis, I will shortly summarise my findings and present you with my answers to the questions above.

However, to start of with I have dedicated a chapter of my thesis to the history of Champagne. I have found that with most things, to understand something as it is today it is vital to understand its past.

2. History

Winston Churchill once said “Remember, gentlemen, it’s not just France we are fighting for, it’s Champagne”.² Champagne is one of the most beloved and famous

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wines in the world and has become a synonym for celebration. But the fizzy golden wine with its fine palette we enjoy today is very different from the Champagne they produced in the past.

Of all the great wines of France, Champagne is the newest arrival.³ Wine has been produced in the Champagne region for over 1500 years⁴ but sparkling wine only became popular at the end of the 19th century, before that most of the wines produced in the Champagne area were still.⁵

The climate of the north of France does not really suit the production of red wines but they tried growing red wine grapes anyway. As a result the skins of the Pinot produced had little colour. Because of this Champagne started out as a still light pink wine, a so called 'vin gris'. The wines were nevertheless renowned for their delicacy and by the early 16th century the wines of particularly the Ay region became so popular that they were described as 'the ordinary drinks of kings and princes'.⁶

Sparkling Champagne did not appear in France until the end of the 17th century. The book "The Business of Champagne, a delicate balance" explains that three random factors coincided to create the ideal conditions for sparkling wine to originate in Champagne.⁷

The first factor was a mini ice age that dominated Europe from the late medieval period until the 19th century, reducing average temperatures. In cold autumns this temperature change slowed the fermentation of wine, often stopping yeast activity temporarily before it restarted in the late spring of the following year. This led to the production of carbon dioxide and thus fine bubbles appeared in the wine. The second factor was the realisation that cork could be an effective and airtight closure for bottles and the third was the development of stronger glass, making bottles for the first time a convenient and capable container.⁸

However, French gourmands loathed sparkling wines, to them Champagne should be a still wine just like a Bordeaux or a Burgundy and they regarded any fizziness as a fault.⁹ The Champagne producers therefore tried everything to eradicate fizziness from their wines.

There is no evidence that the monk Dom Perignon, credited by Moët & Chandon as the inventor of sparkling Champagne, actually invented it. It is far more likely that he spent his life trying to solve this 'winemaking fault' for the taste at that time was for still wines. All the evidence points to the English as the inventors of sparkling Champagne. In fact, the first description of how to make a sparkling wine is in English and not in French and dates to 17 December 1662, therefore 6 years before Dom Perignon arrived in Champagne. It is part of an 8-page lecture on wine presented to the Royal Society in London by a Mr Christopher Merret.¹⁰ The English added sugar and molasses to all sorts of wines, initiating a second fermentation that made the wines sparkle. Apparently they liked their sparkling Champagne best and it became famous for it in London.

Also, by 1615 English glass was much stronger than French glass. Worried that the destruction of English forests by charcoal burners would lead to a shortage of timber that could threaten the future of the fleet, admiral Sir Robert Mansell convinced King James I that charcoal burners were endangering the security of his kingdom. The king promptly issued a ban on wood-fired furnaces leaving coal as the only available alternative. Coal burns at far higher temperatures than wood thus enabling the glassmakers to produce a much stronger glass than their French counterparts who still used wood-fired furnaces. Decades later, this glass proved strong enough to withstand the internal pressure of sparkling Champagne. Despite this, exploding bottles remained all too common until the final quarter of the 19th century when bottles capable of withstanding an internal pressure of 6 atmospheres or more were finally perfected.¹¹

It may be surprising that virtually all Champagne up to this point was essentially sweet. Dry Champagne as we know it today was practically non-existent. Here the English again would seem to have played an important role.

Apparently a London wine merchant named Burnes asked Perrier-Jouët in 1848 to try their 1846 vintage without a dosage of sugar. His idea was to create a new market for dry Champagne since it had to compete with so many other sweet wines. Nobody liked this drier version of Champagne at the time but Burnes' idea must have inspired others because in 1860 several Champagne producers sent the London merchants a drier Champagne than before. These were received more approvingly and by the time the 1874 vintage was released, virtually all the big brands were producing a more dry Champagne.¹²

In France itself, sparkling Champagne was initially less attractive for the négociants than still wine since it was costly and time consuming to produce. But when the more full bodied wines from Burgundy started to sell better than the light and still Champagne wines, they realised that producing only a sparkling variety of Champagne could be good for business. This realisation led to the beginning of Champagne as a true sparkling wine region.¹³

The history of Champagne shows that Champagne evolved from a pink still wine to a sweet sparkling wine and ultimately to the predominately dry variety of today. Champagne proved a survivor due to its willingness to respond to the demands of the market for a sometimes intrinsically different product. Perhaps the recent rise in popularity of Grower Champagne can be viewed as the market asking once again for a different Champagne, this time a less generic and more traceable one.

3. Has Grower Champagne actually become more popular?

The wine community has given more attention to Grower Champagnes in the last ten years than ever before, as witnessed by the sheer volume of publications on the

subject. The fact that the institute of Masters of Wines dedicated a seminar to the subject speaks volumes as well and so do the prices that some Growers can now command for their wines. It would therefore be easy to conclude that Grower Champagne has become more popular.

I was therefore intrigued when I heard the opinion of Steve Charters MW on the subject. Steve Charters MW is a former professor at the Chair of Champagne Management of the Reims Management School and currently holds the position of Director of Research of the School of Wine and Spirits Business in Dijon. He explained to me that, “whilst many grower Champagnes are great, this sector is dying.”¹⁴ He went on to explain that “there is no global trend of popularity for Grower Champagnes: just some markets where they are very popular. In the rapidly growing markets of East Asia and Eastern Europe they are not.”¹⁵

In 2009 he wrote on the subject: “There is talk – more outside Champagne than inside, perhaps – about ‘the rise of the grower’. That is perhaps, more a reflexion of demand in certain key export markets than reality. The great period of growth of grower wines was from the mid-1950s onwards when they began to establish a substantial presence in the French market. However, it is clear that in some mature markets (crucially Belgium, but also Anglophone world and perhaps Scandinavia) high-involvement consumers are looking for more choice and the opportunity to discover wines that are less well-known and perhaps more distinctive. Certainly some reputed, quality-focused growers are gaining a positive critical reception – combined, in part, with the fact that they can respond to a particular requirement of keen consumers because they tend to be more terroir focused.”¹⁶ Clearly his opinion has not changed over the last 6 years.

Paul-Antoine d’Auvergne, the grandson of Paul Bara, a Grower in Bouzy, says that the popularity of Grower Champagne is nothing new. In their case, his grandfather worked tirelessly to promote their domaine from the 1970’s and onwards. They have acquired a growing reputation but he explained that the overall situation for Grower Champagne is not favourable. They regularly lose market share to the big brands.¹⁷

The figures would seem to support the opinions of Charters and d’Auvergne. The table below is an overview of the Global evolution of shipments of Champagne from 2000 till 2014.¹⁸

Figure 1.

	Total	Maisons	%	Vignerons	%	Cooperatives	%
2014	307 136 564	215 093 681	70%	63 154 694	20,6%	28 888 189	9,4%
2013	304 994 034	210 926 650	69,2%	65 747 096	21,6%	28 320 288	9,3%
2012	308 599 509	213 245 160	69,1%	67 664 410	21,9%	27 689 939	9%
2011	322 951 807	222 771 638	69%	71 503 214	22,1%	28 676 955	8,9%
2010	319 496 853	219 141 755	68,6%	72 410 253	22,7%	27 944 845	8,7%
2009	293 330 613	193 548 261	66%	74 827 691	25,5%	24 954 661	8,5%
2008	322 637 259	214 293 274	66,4%	78 463 924	24,3%	29 880 061	9,3%
2007	338 796 703	229 633 001	67,8%	77 492 090	22,9%	31 671 612	9,3%
2006	321 789 798	217 676 304	67,6%	74 653 176	23,2%	29 460 318	9,2%
2005	307 665 132	207 294 622	67,4%	72 632 578	23,6%	27 737 932	9%
2004	301 420 042	202 444 946	67,2%	71 060 018	23,4%	27 915 078	9,2%
2003	293 509 567	197 779 713	67,4%	68 587 595	23,4%	27 142 259	9,2%
2002	287 721 538	195 072 148	67,8%	67 952 094	23,6%	24 697 296	8,6%
2001	262 698 304	172 217 407	65,6%	67 229 977	25,6%	23 250 920	8,8%
2000	253 245 418	168 058 748	66,4%	65 996 654	26%	19 190 016	7,6%

The table shows that the global shipments of the Maisons (big brands) have steadily grown from 2000 onwards whereas the Growers (Vignerons) lost 5,4% market share in the same 15 years. The Cooperatives also saw their exports increase compared to the Vignerons. The above shows that the Grandes Marques have gained market share where the Growers only lost it.

It would therefore seem that in spite of the fact that Grower Champagnes are actually more popular than ever with the media and within the wine trade, the reality is that Grower Champagne is volume-wise on the decline. In an effort to look for an answer to this ostensibly contradictory state of affairs, I had a look at some more figures.

Statistics show that the number of Growers has declined from 5029 in 2000 to 4596 in 2012. In the same period the number of wine growers that supply their grapes to the cooperatives has grown. There is also evidence that more (young) Growers prefer to make money selling grapes rather than producing and selling their own wines.¹⁹

Also, the percentage of grapes sold by grape growers to the big brands has increased from 51,1% in 2000 to 59,2% in 2014, therefore an 8.1% increase in 15 years. The table below clearly shows that especially since 2009 the Grandes Marques seem to have been able to rapidly enlarge their share of the Champagne harvest.²⁰

Figure 2.

Year	% of harvest sold by the growers to the maisons ²¹
2014	59,2%
2013	58%
2012	56,3%
2011	55,8%
2010	55,2%
2009	55%
2008	52,7%
2007	52,7%
2006	53%
2005	53,5%
2004	53%
2003	53%
2002	54,8%
2001	53,9%
2000	51,1%

Could this perhaps have something to do with the price of grapes? The table below shows the price of 1 kilogram of grapes from 2000 till 2014.²²

Figure 3.

Year	€/kg
2014	5,89
2013	5,80
2012	5,73
2011	5,60
2010	5,36
2009	5,25
2008	5,40
2007	5,11
2006	4,81
2005	4,65
2004	4,62
2003	4,39
2002	4,22
2001	4,13
2000	4,00

In 2000 the average price was €4,00 per kilo, in 2014 it was €5,89 per kilo. This means a rise of more than 47% per kilo in the last 15 years.²³

The increased grape price would seem to have had its effect on the market. The grape growers of the Champagne are selling a higher proportion of their harvest to the big brands and apparently a growing number of Growers have decided that they can make more selling their grapes than selling their own wines.

However, in spite of the figures above Grower Champagne have never garnered as much attention as at present. It seems to me that a greater awareness of consumers in some markets, such as Scandinavia, the Anglophone countries and parts of Western Europe, must indeed have locally increased the popularity of Grower Champagne. These also happen to be the countries where a lot of influential wine writers originate from, such as Richard Juhlin, Jancis Robinson MW, Essi Avellan MW and Tom Stevenson. Also, some of the most influential wine magazines are based in said countries, such as Decanter, Fine Champagne Magazine, Tong and the Wine Advocate. However, overall the number of producers of Grower Champagne has decreased as well as its market share compared to that of the Grand Marques and the Cooperatives.

Grower Champagne is more popular than ever on paper but not in sales. The reality is that Grower Champagnes are at present, in spite of their apparent popularity, steadily losing market share to the big brands and cooperatives.

4. What reason lies behind the increased popularity of Grower Champagnes?

In an interview last November with Mélanie Tarlant of Champagne Tarlant, she explains why she believes that Grower Champagnes have become popular. “People are curious and they have changed their habits. People want to know what they eat and drink, that’s where the grower movement fits with them”.²⁴

Due to its price level, branding and glamorous image I believe Champagne was long considered a luxury product and not an actual wine that can be enjoyed with a meal as well. But wine aficionados are becoming increasingly educated and Champagne appears to be turning from a mere aperitif and celebratory drink into a serious wine. Essi Avellan MW would seem to agree with this, she recently wrote that: “Champagne is on the irrevocable path to become a ‘serious’, gastronomic wine”. She believes that the popularity of grower Champagne is tightly linked to this vinous revolution.²⁵ Paul-Antoine D’Auvergne explains that Grower Champagnes stand for the traditional practices of Champagne. They have a good quality image with more flexible prices than the ‘Maisons’. Their image, tradition and the direct contact with the soil are in his opinion the attractiveness of winemakers and thus the reason of its popularity.²⁶

Based on my personal experience I would be inclined to agree with the above. The public has become more knowledgeable and has started to seek out more distinctive wines. Also, the world is currently recovering from arguably its largest economic crisis ever. As a result of the crisis the preference of the gourmet loving public in my country (the Netherlands) has shifted from exotic to local, honest and/or traceable foods. This gave birth to a new culinary movement about 5 years ago dubbed 'Nouveau Ruig' ('new rough', a wordplay on new cuisine).²⁷ Nouveau Ruig is in its essence no frills attached recognizable and traceable food. The current popularity of microbreweries in the Netherlands²⁸ and the UK²⁹ is another example of the public's current taste for local and/or distinguishable products.

In my experience as a sommelier and wine importer, the same is more or less true when it comes to wine, including Champagne. People wish to know more about the origin of the wine, preferring a more individual, authentic and traceable wine over wines produced in mass quantities of unclear origin. The public has started to look for particular and distinctive wines and Grower Champagne provides what they seek.

5. Have the Grandes Marques reacted to the increased popularity of Grower Champagne?

Although the number of Grower Champagne producers has decreased its popularity seems to be on the rise in certain markets, albeit not in growth markets like Eastern Europe and Asia. Has this prompted a response from the Grandes Marques?

In the last 5 years some of the Grandes Marques have released new Champagnes that seem to have a more terroir based focus and/or a lower dosage. For instance Brut Nature from Roederer and Essentiel (Cuvee Brut) from Piper Heidsieck.

I believe the above shows that the Grand Marques have taken notice of the (new) consumer demand for more authentic, traceable and gastronomic Champagnes such as offered by Grower Champagnes. It seems too coincidental to me to subscribe this development to any other cause. Furthermore, history shows that the big brands have always been willing, perhaps somewhat hesitant at first, to cater to the changing demands of its clientele. I therefore expect that the Grand Marques will continue to introduce special bottlings with a more authentic, original and/or terroir-based character.

Looking at the tables in chapter 3, I would however add to this that the Grand Marques have at this point in time no real reason to feel threatened by the increased popularity of Grower Champagne in some regions. The market share of the Grand Marques has been rising steadily over the last 15 years whereas the number of Grower Champagne producers (as well as their market share) has decreased.

Steve Charters MW agrees with this. He believes that the Grandes Marques certainly want to limit the presence of Grower Champagnes on overseas market and are trying

to limit the generic promotion of Champagne as opposed to the individual big brands, but they don't really worry.³⁰

Jancis Robinson MW also suspects that they don't seriously worry yet, because the quantities that are exported are still relatively low, but on the other hand she also pointed out that more and more of the big brands are releasing special bottlings, such as single vineyard or zero dosage, to compete with grower Champagnes on their own terms.³¹ Paul-Antoine d'Auvergne is also of the opinion that the Grandes Marques do not worry at all. He explains that Grower Champagnes represent a volume too low for the Grandes Marques to worry about.³² Ronald Hulst, a Dutch Champagne specialist and buyer believes that by introducing cuvees like 'Brut Nature' the Grandes Marques are responding in order to meet demand for wider varieties and purity.³³

If anything, it seems plausible to me that that Grandes Marques have started to hedge their bets, making sure that whatever the consumer majority (or loud minority) decides it likes, they can supply. Perhaps the Grandes Marques are keen students of their own history. One thing seems clear, they are not worried.

6. Is Grower Champagne here to stay?

Will Grower Champagne prove to be a permanent fixture or not? The data on Grower Champagnes seems to indicate that it has indeed become more popular, but only in certain markets, whereas the number of producers of Grower Champagnes has been in decline since 2000.

Essie Avellan MW believes that Grower Champagnes are a niche market but sees a growing trend. She explains: "Every market is individual but in every market the more mature consumers and the early adopters have discovered them and it is of course funnelling its way to a broader audience". She absolutely believes that the market for Grower Champagne is already increasing.³⁴

Steve Charters MW believes that (as quoted earlier) the rise of growers is more a reflection of demand in certain key export markets than reality.³⁵ Jancis Robinson MW is of the opinion that the popularity of grower Champagne is definitely permanent.³⁶ Ronald Hulst adds to this that the originality and characteristics of Grower Champagne, together with the attention from the wine trade and the media, have increased their market position. Moreover, Grower Champagnes are often cheaper.³⁷ Another leading Dutch wine specialist and Champagne buyer, Karel de Graaf, adds that importers and consumers appreciate the originality and quality of these Grower Champagnes.³⁸ Frank Smulders MW supposes that Grower Champagnes are here to stay since "They add something to the offer of the NM's, in terms of quality and style."³⁹

Perhaps supporting the shared opinion of these authorities is a new development in Asia where Hong Kong sommeliers, always on the forefront of new developments in

Asia, are adding more and more Grower Champagnes to their high-end wine lists.⁴⁰ This could indicate that Grower Champagnes have found a first foothold in the lucrative Asian market.

I have come to believe that Grower Champagne is indeed here to stay. I say this not just because all the aforementioned authorities believe this to be the case, but also because I have personally witnessed the consumers increased desire for originality, authenticity and terroir based quality. Also, as Frank Smulders MW stated above, Grower Champagnes really does give consumers a great alternative to the style of Champagne making of the big brands. The fact that the Grand Marques have started producing their own Grower Champagne 'inspired' bottles proves to me that they have also recognized the consumers wish for something different and perhaps more traceable.

7. Future prospects

Since the 19th century Champagne producers have skilfully cultivated an image of glamour and luxury, spending millions promoting their brands. This includes sponsoring sports competitions and society events, such as the US\$ 400.000,- worth of Champagne that Perrier-Jouët recently freely supplied for reality star Kim Kardashian's wedding.

The Grower Champagne producers have nothing like the financial means to their disposal that the big brands have. Although some have joined hands in an effort to raise more awareness with the greater public through branding, such as the 26 producers that are united in the Special Club (Club Trésors de Champagne), Grower Champagne is not a brand like the Champagne of the Grandes Marques is. The Special Club was founded in 1971, which makes it 44 years old today. In those 44 years it hasn't even come close to garnering brand recognition equal to that of any one of the Grandes Marques.

After a Grower Champagne tasting in 2013, Jancis Robinson MW was full of praise regarding the wines she had tasted, but also remarked that even the best-known name of the Grower Champagnes she tasted (Egly-Ouriet) "enjoys nothing like the brand recognition of one of the big brands..."⁴¹ Paul-Antoine d'Auvergne believes that the Grandes Marques participate on a riskier market on which the grower Champagnes do not attempt to participate and that Grower Champagne will remain a niche market because of lack of volume.⁴²

I believe D' Auvergne is right to believe that Grower Champagnes will always remain a niche market. The Grandes Marques have established strong brand identities, have huge marketing budgets and produce vast volumes of wine. Grower Champagne producers have none of the above and in this day and age this means that it will remain a niche market.

In economics a lack of growth often heralds the beginning of the end. Does the likelihood of Grower Champagne remaining a niche market therefore spell doom? As we have seen in the previous chapters, the number of Grower Champagne producers and the volume they export has been steadily declining. At the same time the price for grapes has never been higher than today and the demand of the Grandes Marques for volume keeps increasing. It is therefore not hard to imagine that some Growers have decided to just sell their grapes instead of going through the trouble of producing Champagne.⁴³

And what about the quality of Grower Champagne? Essi Avellan MW recently wrote that “Champagne is on the irrevocable path to become a ‘serious’, gastronomic wine”.⁴⁴ If that is so, the quality of Grower Champagne is (of course) of paramount importance. Jancis Robinson MW has a feeling that some of the lesser Grower Champagnes currently thrive because of a vogue for it and she believes that only the top 15% make really good Champagne.⁴⁵ Steve Charters MW adds to this, “Only a few will become very successful, maybe 400 grower Champagnes. He foresees that they will probably grow in size and will expand their own market share. The number of the rest will shrink, and the typical winemaker who sells wine at an average of less than €13 in the region will slowly fade away”.⁴⁶

Ronald Hulst, Karel de Graaf and Frank Smulders MW all believe that the future for Grower Champagnes is bright. They expect improved quality and a steady market share. Karel de Graaf adds that he foresees a healthy future for them, but only if they can keep their prices competitive.

I believe that Grower Champagne has a bright future ahead of itself but not in its current form. I agree with Essi Avellan MW that Grower Champagne is becoming a serious gastronomic wine but only as long as the quality remains high and if Jancis Robinson MW is correct, the 85% that produce under par wines will suffer once the trendiness wears off. I also believe that the number of Growers will continue to shrink. In the coming years the chaff will be separated from the wheat and after that the very attractive grape prices will prove for many of the ‘85%’ to hard to resist.

However, the ‘cult’ Grower Champagnes, such as Jacques Selosse and Egly-Ouriet, will continue to attract attention to the niche market of Grower Champagne. Their products are so unique, scarce and exclusive, that the upcoming Champagne markets will take note. Hong Kong Sommeliers have discovered how great Grower Champagnes can be and the big names in Grower Champagne will continue to shine and clear a path for their lesser known brethren, but only for those who produce a great quality Champagne.

8. Conclusion

What I set out to discover in this thesis is whether the rise of Grower Champagne is just a trend or whether it will become a lasting fixture of Champagne. On my journey

towards finding an answer to this question I briefly described the history of Champagne and researched current popularity of Grower Champagne, what its future prospects may be and whether the Grand Marques have reacted to its risen popularity.

What I have come to believe is that the rise of Grower Champagne is not a trend that might be gone by tomorrow. I believe Grower Champagne is here to stay. The wine trade as well as the wine loving public have, very much enthused by the media, picked up on not only its existence but also on its ability to act as a unique, traceable and original alternative to big brand Champagnes. Now that the greater public has to some extent been schooled and made aware of the marvels of Grower Champagne, the cat is out of the bag. I believe that in the regions where Grower Champagne has gained a foothold, the public will continue to seek out Grower Champagne for its unique characteristics. I also believe that it won't be long before the Champagne growth markets pick up on the fact that there are some very scarce, exclusive and sought after Champagnes out there that have garnered a lot of positive press and attention. This will pave the way for Grower Champagnes in the growth markets, but at a far slower pace than the big brands. Time will tell if they will be able to reverse their current loss in market share.

I have furthermore come to believe that the Grand Marques do not fear the rising popularity of Grower Champagne. Perhaps just like them I believe that its limited availability (volume), its limited marketing resources and its character itself (unique expression of a terroir) will ensure that Grower Champagne always remains a niche market, albeit a possibly very lucrative one. However, some of the Grandes Marques have noticed a change in the appetite of the Champagne buying public and have stated to produce more 'Grower Champagne like' wines.

I suspect that the survival of Grower Champagne producers will mainly hinge on two things, firstly the quality of their Champagne and secondly the (rising) price of grapes on the open market. As long as a Grower produces outstanding quality and has the means to sell his or her product, the chances of survival will be good to great. But with an increasingly educated and critical public, a medium quality Champagne will not suffice. I expect that the public will (nearly always) choose the relative safety of a big brand Champagne over a Grower Champagne with a possibly dubious quality. As soon as that happens, the Grower will probably decide that the same or perhaps more money can be earned in a far easier fashion by selling the grapes on the open market and he or she will cease to produce wine.

Perhaps inspired by the international crisis that started in 2008, people have become more conscience of what they eat and drink. Authenticity, traceability and originality have become more important and Grower Champagne ticks all those boxes. I believe that inspired by greats such as Jacques Selosse, Egly-Ouriet and Agrapart, the Growers community will strive for excellence thus ensuring survival for those that produce consistently good quality.

Diversity is great, choice is great. As a Champagne lover I applaud the fact that next to the continually excellent quality of most Grandes Marques I now live in an era in which I can easily choose, if the mood strikes me, for a more terroir oriented and traceable Champagne.

9. Acknowledgement

I want to express my gratitude to all those who took the time to help me with my thesis and especially to Jancis Robinson MW, Steve Charters MW, Paul-Antoine d'Auvergne, Ronald Hulst, Frank Smulders MW, Karel de Graaf and my boyfriend Joris Engelsma. Everyone of them helped me to better understand the fascinating world of Champagne and contributed something special. I would also like to thank the pioneers of Champagne who have made it possible for us all to enjoy this unique and incredible wine today.

10. Appendix

This chapter is meant for extra information. None of the persons I interviewed asked for anonymity so please find below the interviews I took when working on this thesis. I used 'Google translate' to translate the interviews from Dutch and French to English.

1. Personal interview with Jancis Robinson

- Q. What in your opinion are the main reasons for the rise of Grower Champagnes?
- A. Quality, value and the fact that these wines have a more interesting and specific story than the Grandes Marques (GM).
- Q. Do you believe the current popularity of Grower Champagne a just a trend or perhaps a more permanent thing? Why do you think so?
- A. More permanent because there are far more knowledgeable consumers today who understand the difference between GC and GM.
- Q. Have you perceived a reaction from the Grandes Marques to this trend? If yes, what was it?
- A. Not much though the odd GM grumbles about inconsistency of GC.
- Q. Do you believe the Grandes Marques are worried about the current popularity of Grower Champagnes and/or the market share they lost?
- A. I suspect they are not seriously worried yet because quantities exported are still relatively low, but on the other hand more and more of them are bringing out special bottlings, eg single vineyard or zero dosage, to compete with GC on their own terms.
- Q. What do you believe the future of Grower Champagnes will look like?

A. I have a nasty feeling that some of the less good GCs will thrive because of a vogue for GC when in fact only the top 15% or so make really good Champagne.

Q. What are your 5 favourite Grower Champagnes (just to satisfy my curiosity)?

A. Egly-Ouriet, Larmandier-Bernier, Marguet, Chartogne Taillet, Ulysse Colin.

2. Personal interview with Steve Charters.

Whilst many grower champagnes are great (and I drink far more of them than negociant wines), the sector is dying. The statistics show that from 2000, when there were 5029 of them, they have declined to 4596 in 2012. What is more the proportion of RMs (who make their own wine) is reducing whereas the proportion of RCs (who don't make their own wine) is increasing. There is also evidence that the younger generation of growers prefers to make money selling grapes to the houses rather than selling wine. There is no global trend of popularity for grower champagnes: just some markets (London, New York, San Francisco, Melbourne) where they are very popular. In the rapidly growing markets of east Asia and eastern Europe they aren't.

Q. What in your opinion are the main reasons for the rise of Grower Champagnes?

A. See above. However, in markets where they are popular they represent a reaction against the 'sameness' of négociant wines, and the sense that the latter are perhaps industrial.

Q. Do you believe the current popularity of Grower Champagne is just a trend or perhaps a more permanent thing? Why do you think so?

A. See above.

Q. Have you perceived a reaction from the Grandes Marques to this trend? If yes, what was it?

A. They certainly want to limit the presence of RM wines on overseas market, and are trying to limit the generic promotion of champagne as opposed to the individual (big) brands.

Q. Do you believe the Grandes Marques are worried about the current popularity of Grower Champagnes and/or the market share they lost?

A. They have not lost market share, they have gained it. In 2000 negociants had 66.4% of the market, coops 7.6% and vigneronns had 26%. By 2014 the houses had grown to 70%, coops to 9.4% and vigneronns had shrunk to 20.6%.

Q. What do you believe the future of Grower Champagnes will look like?

A. A few (maybe 400) will become very successful, will probably grow in size and will expand market share. The number of the rest will shrink, and the typical

vigneron who sells wine at an average of less than 13€ in the region will slowly fade away.

Q. What are your 5 favourite Grower Champagnes (just to satisfy my curiosity)?

A. Sorry – I'm afraid I never name favourites...

3. Personal interview with Paul-Antoine d'Auvergne

Q. What in your opinion are the main reasons for the rise of Grower Champagnes?

A. *Les vigneronns sont encore aujourd'hui les garants des pratiques traditionnelles champenoises. Ils ont une bonne image de qualité avec des tarifs plus souples que Maison de Champagne, surtout au vu des quantités livrées. L'image, la tradition, le contact direct avec le terroir font l'attractivité des vigneronns.*

The winemakers are still the guarantors of Champagne traditional practices. They have a good quality image with more flexible prices than Champagne House, especially given the quantities delivered. The image, tradition, direct contact with the soil are the attractiveness of winemakers.

Q. Do you believe the current popularity of Grower Champagne a just a trend or perhaps a more permanent thing? Why do you think so?

A. *La popularité des vigneronns n'est pas nouvelle. Dans notre cas, mon grand-père s'est attaché à faire connaître notre maison depuis les années 70. Nous avons acquis une notoriété grandissante depuis ces années. L'intérêt pour les vigneronns devient plus important parce que les acheteurs professionnels de champagne voit tout simplement que les bouteilles de producteurs donnent une bonne image envers le consommateur. A chaque producteur de conserver cette image pour maintenir la popularité des vigneronns champenois.*

The popularity of winemakers is not new. In our case, my grandfather has worked to make our home since the 70 We have acquired a growing reputation for these years. The interest for winemakers becomes more important because professional buyers of champagne simply sees that producers bottles give a good image to the consumer. Each producer to retain the image to maintain the popularity of Champagne growers.

Q. Have you perceived a reaction from the Grandes Marques to this trend? If yes, what was it?

A. *La conjoncture globale pour les vigneronns champenois n'est pas favorable. Nous perdons régulièrement des parts de marché face aux grandes maisons. Nous sommes de toute manière complémentaire. Les grandes maisons vont sur des marchés plus risqués que les vigneronns ne tentent pas d'entrée. Les vigneronns, au vu de leur volume resteront sur des marchés de niche.*

The overall situation for Champagne growers is not favorable. We regularly lose market share against larger houses. We are all complementary. The great houses are riskier than the winemakers do not attempt to input markets. Winemakers, in view of their volume will remain in niche markets.

Q. Do you believe the Grandes Marques are worried about the current popularity of Grower Champagnes and/or the market share they lost?

A. *Non pas du tout, les vigneronns représentent un trop faible volume pour qu'il y ait des inquiétudes.*

Not at all, vintners represent a volume too low for there to be concerns.

Q. What do you believe the future of Grower Champagnes will look like?

A. *Que leur popularité grandisse tout en restant accessible à un plus grand nombre de personne.*

Whether their popularity grow while remaining accessible to a larger number of people.

Q. What are your 5 favourite Grower Champagnes (just to satisfy my curiosity)?

A. Pierre Gimmonet, De Sousa, Pierre Paillard, Goutorbe, Benoît Lahaye.

4. Personal interview with Frank Smulders, MW

Q. What in your opinion are the main reasons for the rise of Grower Champagnes?

A. First of all of course the general improvement of grower Champagnes. In the slipstream of Anselme Selosse's work, more and more growers became inspired to work on the quality of their wines. At the level of consumers, this strive for higher quality was well received, supported by the widely spread winelover's adagium 'small is beautiful'. I would like to add to that that top growers have certainly added new dynamics to the region, by adding diversity to the general offer.

Q. Do you believe the current popularity of Grower Champagne a just a trend or perhaps a more permanent thing? Why do you think so?

A. I suppose it is there to stay. They add something to the offer of the NM's, in terms of quality and style.

Q. Have you perceived a reaction from the Grandes Marques to this trend? If yes, what was it?

A. Not really. In any case the volumes of the high end or famous growers are so small they hardly form a threat.

Q. Do you believe the Grandes Marques are worried about the current popularity of Grower Champagnes and/or the market share they lost?

- A. No. I don't believe they loose marketshare.
- Q. What do you believe the future of Grower Champagnes will look like?
- A. I suppose that there will be more growers in the future who will try to improve their quality and develop a sustainable market for their wines.
- Q. What are your 5 favourite Grower Champagnes (just to satisfy my curiosity)?
- A. Egly-Ouriet, Jacquesson (officially a NM but in practice for 95% a grower), Larmandier-Bernier, Tarlant, De Sousa.

5. Personal interview with Ronald Hulst

- Q. What in your opinion are the main reasons for the rise of Grower Champagnes?
- A. *De Champagnes van "Vignerons" zitten duidelijk in de lift. Champagne is een toonbeeld van conservatisme en 'ons kent ons'. Het gaat dan voornamelijk om de Grande Marques die koortsachtig verdedigen dat de beste champagnes een product zijn van assemblages van druiven, terroirs en verschillende jaargangen. Alleen dan kun je een complexe champagne creëren. Als er over Champagne geschreven wordt is het meestal over deze Grandes Marques. De Vignerons zijn relatief onbekend. Nu is er duidelijk een trend waarneembaar die is ingezet door kwaliteit gerichte importeurs, journalisten en sommeliers die champagne meer gaan zien als een wijn en niet slechts bubbels. Bij de vigneronen word je dan op je wenken bedient omdat de champagnes van deze producenten vaak typisch zijn voor druivensoort en terroir, in wezen net als in de Bourgogne.*

The Champagnes of "Vignerons" are clearly on the rise. Champagne is a model of conservatism and "knows us." It mainly concerns the Grande Marques feverishly defending the best champagnes are a product of assemblages of grapes, terroirs and different vintages. Only then can you create a complex champagne. As is written about Champagne is usually called about this Grandes Marques. The Vignerons are relatively unknown. Now there is clearly a trend that began with quality-oriented importers, journalists and sommeliers of champagne more as a wine and not just bubbles. The vigneronen get you on your beckon serves as the champagnes of these producers are often typical of grape and terroir, in essence, just as in Burgundy.

- Q. Do you believe the current popularity of Grower Champagne a just a trend or perhaps a more permanent thing? Why do you think so?
- A. *Vignerons kunnen zich blijvend blijven verheugen op een toenemende populariteit omdat zij zich beter op de markt positioneren, de producten zich onderscheiden door typiciteit en originaliteit, en er meer aandacht vanuit het vak en media. Bovendien zijn de boeren veelal goedkoper.*

Vignerons can remain permanently enjoying increasing popularity as they position themselves better on the market, products are distinguished by typicality and originality, and more attention from the trade and media. Furthermore, farmers are often cheaper.

Q. Have you perceived a reaction from the Grandes Marques to this trend? If yes, what was it?

A. *Grande Marques houden wel degelijk rekening met het groeiend markt aandeel van de boeren, ook al blijven ze bij hun overtuiging van het blenden (noodgedwongen ivm productie hoeveelheden en wijngaardbezit) Zolang de grote huizen hun markt aandeel blijven behouden zullen ze claimen dat met de vigneronen er een grotere verscheidenheid is. Overigens zie je de invloed van de vigneronen wel bij de grote huizen in de zin dat er meer verschillende cuvees worden geproduceerd, om aan vraag naar grotere verscheidenheid en puurheid te kunnen voldoen . Denk dan b.v aan brut nature ed.*

Grande Marques keep certainly consider the growing market share of the farmers, even though they remain in their conviction of blending (of necessity due to production quantities and vineyard property) As long as the big houses keep their market share maintained they claim that the vigneronen there is a greater variety. Incidentally, you do see the influence of the vigneronen at the large houses are produced in the sense that there are more different cuvees, in order to meet demand for wider variety and purity. Think e.g to brut nature ed.

Q. Do you believe the Grandes Marques are worried about the current popularity of Grower Champagnes and/or the market share they lost?

A. *Zie antwoord vraag 3.*

See answer to Question 3.

Q. What do you believe the future of Grower Champagnes will look like?

A. *Vigneronen zullen zich blijven ontwikkelen. Om meer aandacht van de pers te krijgen zie je meer en meer boeren biologisch gaan werken ook zie je meer en meer houten vaten en cementen eieren in de kelders. Ook zullen er meer en meer selection parcelaires op de markt verschijnen.*

Vignerons will continue to evolve. In order to get more attention from the press, you see more and more farmers are going to work organically, you see more and more wooden barrels and cement eggs in the cellars. There will also be more and more selection parcelaires appear on the market.

Q. What are your 5 favourite Grower Champagnes (just to satisfy my curiosity)?

A. Agrapart, Selosse, Bereche, Peters, Arnould, Bonnaire, Doquet, Alain Robert, Egly-Ouriet, Laval, Ledru etc.

6. Personal interview Karel de Graaf

Q. What in your opinion are the main reasons for the rise of Grower Champagnes?

A. *De laatste jaren zijn Grower Champagnes populairder geworden vanwege hun aantrekkelijke prijzen. Ze hebben immers geen marketingkosten en hoeven niet een stijgende prijs voor de druiven te betalen zoals de Grandes Marques. Bovendien produceren zij een origineel product, dus geen blend van druiven van vele honderden leveranciers, met een traceerbare herkomst.*

In recent years Grower Champagnes have become more popular because of their attractive prices. After all, they have no marketing costs and do not have to pay a rising price for the grapes as the Grandes Marques. In addition, they produce an original product, so no blend of grapes from hundreds of vendors, with a traceable origin.

Q. Do you believe the current popularity of Grower Champagne a just a trend or perhaps a more permanent thing? Why do you think so?

A. *Deze populariteit is naar mijn mening blijvend gezien de groei van het aantal Grower Champagnes. Ik denk ook dat importeur en consument de originaliteit en de kwaliteit van de wijnen waarderen.*

This popularity is in my opinion, given the continuing growth in the number Grower Champagnes. I also think that importers and consumers appreciate the originality and quality of the wines.

Q. Have you perceived a reaction from the Grandes Marques to this trend? If yes, what was it?

A. *De Champagnes van de Grandes Marques zijn de laatste jaren behoorlijk duurder geworden. Een teken dat het steeds moeilijker voor ze wordt om aan druiven te komen. De prijs voor druiven uit een Grand Cru dorp is nu al zeven euro of meer per kilo!*

The Champagnes of the Grandes Marques in recent years become quite expensive. A sign that it is becoming increasingly difficult for them to get grapes. The price of grapes from the Grand Cru village is already seven euros or more per kilo!

Q. Do you believe the Grandes Marques are worried about the current popularity of Grower Champagnes and/or the market share they lost?

A. *Ja, natuurlijk. Net als in de Bourgogne beginnen steeds meer Champagneboeren zelf te bottelen. Het wordt voor de huizen dus steeds moeilijker om aan druiven uit de bekende gebieden te komen en ze zullen nog meer moeten uitwijken naar gebieden als de Aube en de Côte de Sézanne.*

Yes, of course. As in Burgundy begin increasing Champagne Farmers own bottling. It is for the houses more and more difficult to get grapes from the known areas and they will have even more to move to areas like the Aube and the Côte de Sézanne.

Q. What do you believe the future of Grower Champagnes will look like?

A. *Hun toekomst ziet er naar mijn smaak gezond uit als ze hun prijzen goed in de hand kunnen houden. Champagne wordt namelijk (ook in Nederland) een steeds populairder product.*

Their future looks bright for my taste healthy as they can keep their prices well in hand. Champagne is in fact (in the Netherlands), an increasingly popular product.

Q. What are your 5 favourite Grower Champagnes (just to satisfy my curiosity)?

A. *Ik ben een groot liefhebber van de mineraliteit en zuurgraad van de blanc de blancs van Le Mesnil-sur-Oger:*

I am a big fan of the minerality and acidity of the blanc de blancs of Le Mesnil-sur-Oger:

Guy Charlemagne, Le Mesnil-sur-Oger

Pierre Peters, Le Mesnil-sur-Oger

Gimmonet-Gonet, Le Mesnil-sur-Oger

Patrick Regnault, Le Mesnil-sur-Oger

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