

Abstract

Brunello di Montalcino; tradition versus innovation

The subject of this article is the complex DOCG of Brunello di Montalcino. This DOCG has changed a lot in the last decades and discussion about optional future changes are ongoing. As Nicolas Belfrage states "Tuscany's wine culture reaches back to antiquity but it has advanced very little. During the past 40 years, he states, we have seen a Tuscan wine renaissance"¹. A phrase which makes sense when speaking about Montalcino where the first traces of wine date back to the Etruscans. The first Brunello was made by the end of the 19th century but it is only from the 1980s onwards that the real Brunello boom started. It started when Brunello became one of the first five DOCG's that the potential of the area was recognized and money was invested to maintain vineyards and produce wines. Over the years traditions have been protected and research, improvements and even scandals have contributed to the current status of Brunello as a luxury and unique wine. Nowadays leading international beverage companies and producers invest in the sector and wine sales are no longer producers' biggest worry^{2,3}. The rising number of producers -currently 221-⁴ in combination with the range different terroirs- causes a complex landscape of available style types. As prices gradually rise the target groups consists of critical buyers with high expectations, which need to be managed accordingly. Sub-zoning is a solution often proposed as a differentiation method to subdivide style types. This research describes and evaluates past developments, important stakeholders, geographical structure and consumer behavior and predicts the strategic need for differentiation. Several points of view on the discussion whether or not to sub-zone will be discussed.

Continuing on the subject of consumer expectations; Franco Biondi Santi, before his death in 2013, mentioned zoning as a way to manage consumer expectations. Not only for reason of consumer expectations but also with the rising number of producers, the need for a differentiation system is confirmed by several stakeholders. According to O'Keefe (2012) the subzones, as outlined in attachment IV, are agreed by producers and academics that have researched the growing zone⁵. This current unofficial model is a Chianti-like model based on clearly limited zones with a distinctive wine style per zone. In attachment IV, a SWOT analysis based on this sub-zoning model is outlined. Several producers argue in favour of this specific sub-zoning system, mainly the ones in better known zones such as Montalcino South, - North and Sant'Angelo in Colle. Costanti, for example, thinks that establishing subzones would help to guide consumers and create the necessary consumer awareness. Down south in Sant'Angelo in Colle, Lars Leicht, vice-president of Castello Banfi argues that the recognition of sub-zones would improve the image of Brunello di Montalcino and emphasize its special character⁶. Count Marone Cinzano from Col d'Orcia states that it is not the question if, but when the sub-zoning will be applied. In Cinzano's opinion, a differentiation model based on vineyard site would better indicate the differences in terroir as there are too many differences within the sub-zones⁷. A certain model based on vineyard site is applied in Barolo and although you have to be an expert to make an accurate choice for a wine style specification, this differentiation method goes more into detail. Enzo Tiezzi suggests a way of differentiation based on the continuation of the use of vigne or cru's to provide customer awareness⁸. While Tiezzi's argument against the sub-zoning model is, that it can cause a hierarchy between the zones which is a pity while it is also a question of consumer taste⁹. Stefano Cinelli Colombini thinks that factors like

¹ Belfrage, N. (2009), p. 4

² See: <http://www.winespectator.com/webfeature/show/id/EPI-Purchases-Majority-Stake-in-Biondi-Santi-Wine-Estate>, 5 June 2017.

³ Denis, P., Vidalon, D. (2017): LVMH sets up vehicle to hunt for emerging luxury brands, 3 February 2017.

⁴ See: <http://www.consorziobrunellomontalcino.it/store/file-74.pdf>, 10 June 2017.

⁵ O'Keefe, K. (2012), P. 85.

⁶ O'Keefe, K. (2008): Brunello on the Brink, 19 August 2008.

⁷ Marone Cinzano, F. (2017), company tour, conversation and bottle and barrel tasting, 10 May 2017 in Montalcino.

⁸ Tiezzi, E. (2017), company tour, conversation and barrel tasting, 9 May 2017 in Montalcino.

⁹ Tiezzi, E. (2017), company tour, conversation and barrel tasting, 9 May 2017 in Montalcino.

climate change and vintage variation make an appropriate differentiation system impossible as climatological factors affect style types during the years and will outdate the current zoning model¹⁰. David Gleave MW argues that there is changing a lot within Montalcino DOCG the last thirty years; waiting for the results of improvements that have been done is important as they can affect the subzoning¹¹.

Conclusion

Considering the strengths and the opportunities in the SWOT-analysis of the sub-zoning model, supported by several influential producers in terms of voting power within the Consorzio del Brunello di Montalcino. I must stick to the words of Count Marone Cinzano saying, “the question is not if but when”. “Not now” would probably be the answer, as arguments against the sub-zoning prove the model not to be adequate in the current landscape. Producers blending wines out of different sub-zones do not fit into the model. Furthermore the model has no solution to guide the consumer through the big concentration of producers within the sub-zones Montalcino North and – South. Last but not least, research and improvements currently done within the zones can outdate the model within a few years. For example, clonal research done by big producers such as Col d’Orcia in cooperation with universities in Siena and Florence. These studies will generate knowledge regarding the appropriateness of several clones onto the several soil types in the sub-zones. Results can give producers the opportunity to choose the sangiovese grosso clone best suited to their terroir which can have a significant effect on a certain style type in a sub-zone. In addition, the current trend of big beverage companies investing in Brunello di Montalcino create even new opportunities for research and improvements within the DOCG.

Variation in geographical aspects within the DOCG create a complex range of wines in all different style types as demonstrated in this study. Consumer demand is surpassing market supply year by year unless the growing producer number and Brunello di Montalcino is maintaining his image as a high end and premium wine. These conclusions emphasize the need for a differentiation strategy as clearly proved in this study.

A solution can be found in the tradition. As Stefano Cinelli Colombini argues, the Ilcinesi are known for protecting their traditions but combining them with innovation. History has proven the potential of certain plots, currently known as vigna. Landowners already dedicated specific plots to specialized vine growing even if it was unusual during the Mezzadria. Tiezzi’s Vigna Soccorso¹², Fattoria dei Barbi’s Vigna del Fiore are examples of current vigna that have been specialized vineyards already by the end of the 19th century¹³. Nowadays vigna, like Altesino’s Montesoli and Col d’Orcia’s Poggio al Vento, are a market trend which creates consumer awareness and brand recognition. This brand recognition is not limited to the specific vigna but it generates exposure for the whole Brunello di Montalcino DOCG.

This ongoing trend of nominating vigna fits perfectly in the differentiation strategy Count Marone Cinzano suggests: a model based on vineyard sites. A model which is already reality within the DOCG areas as brown road signs indicate these vineyard sites. Wine tourism has never been so massive in Montalcino and tourists will be immediately guided and informed following these signs through the roads. These model of vineyards sites can be further enrolled and a marketing strategy is required but could be developed by the Consorzio del Brunello di Montalcino, in charge of sharing knowledge and promoting Brunello di Montalcino.

¹⁰ Cinelli Colombini, S. (2017), company tour, round tour in the wine museum, conversation and tasting, 10 May 2017 in Montalcino.

¹¹ O’Keefe, K. (2008): Brunello on the Brink, 19 August 2008.

¹² See: <http://www.tiezzivini.it/index.php?lg=en#storia>, 5 June 2017.

¹³ See: <http://www.fattoriadeibarbi.it/en/brunello-di-montalcino-docg-vigna-del-fiore-white-label/>, 5 June 2017.