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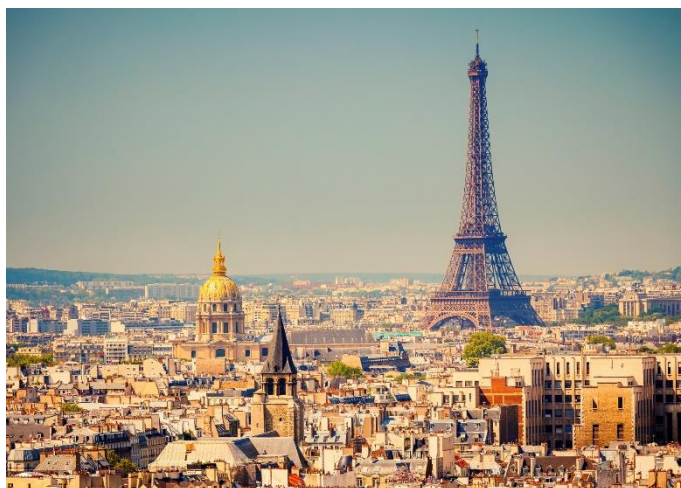
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Economic organisation and territoriality within the wine industry of quality : a comparison between France and New Zealand

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Abstract

*At first sight the wine industries of the countries of Europe and the New World use geographic space to create value in quite different ways. The French appellation system divides space in an intricate, hierarchical manner and regulates many of the actions of enterprises. In most New World countries, in contrast, rules about the naming of wines and viticultural and winemaking practices are much looser. Yet, when it comes to commercial practices and details of **labelling**, enterprises in the New World use territory in a range of ways to enhance their images and to manage their risks. Moreover, different forms of production, notably family producers and large corporations, relate to territory at different scales and in different ways. These practices are investigated by examining the geography of the commodity chains of winemaking enterprises in New Zealand and France (Burgundy) in relation to their local and regional environments. The use of different analytical perspectives - the enterprise and the territorial complex - to understand these agro-commodity chains is explored.*

*This paper explores three themes from our initial interviews and data collection. The first is a description of the forms of territoriality of two central protagonists in the two contexts : the large corporation Montana in New Zealand, which plays a dominant role in the New Zealand "filière" and the "négociants-éleveurs" in Burgundy. The second is the role of geographic indications and the professional organisations of the two regions in their territoriality and the third is to reflect on the convergence between France and New Zealand in the territorial **behaviour** of the participants in industries of the two countries.*

Keywords : Wine industry, agrocommodity chain, regulation, territoriality, Burgundy, New Zealand

INTRODUCTION

This paper analyses the recent evolution of agro-commodity chains that produce quality products, an idea succinctly captured in the French *Filières agro-alimentaires de qualité*. This concise, expressive phrase identifies both the existence of such chains, the formulation of policy and regulation to support them, and their theorisation and empirical study in the social science literature. The regulatory support for such *filières* in France is most directly evident in the changes to the appellation laws in the 1980s. From shortly after their inception they had been known as *Appellations d'Origine Contrôlée des Vins et Eaux-de-Vie*. In the 1980s, the specific reference to wines and spirits was removed with the aim of being inclusive of other products that derive their uniqueness from the qualities of the locality where they are grown. This change recognises that the production of animals, crops and a range of transformed artisan products that are associated with particular places. The adjustment emphasises that, for a variety of products, it is possible to distinguish specialised production of *de luxe* goods from bulk commodities that are more industrialised and standardised in the nature of their commodity chain and in their final products. In a sense, this widening of the definition distinguishes for all products the two classes of wines distinguished in French laws – the wines eligible for an appellation and *vins de consommation courante*.

1. THE ECONOMIC GEOGRAPHY OF ENTERPRISES AND ORGANISATIONAL FORMS IN AGRO-COMMODITY CHAINS

We use two possible points of entry for our discussion – by the enterprise and by the collective organisation of the regional actors in the framework of localised production systems (*systèmes productifs localisés*). These two entries correspond to strategies more or less developed in different regions and countries. The New Zealand wine industry provides an excellent example of the territorial strategies of enterprises which have their production chains distributed across various regions of the country. The French regions with *Appellations d'Origine*, especially the prestigious ones such as Burgundy, seem, at first sight, examples of the operation of localised production systems. In both cases, the direct objective is to achieve a better return for the product than would be obtained on a market for more standardised wine. Value is built on the foundation

of specific reputations with the intention of generating types of excess profits or rents based on quality.

In choosing these two points of entry, we echo some of the theoretical debates of economic geography and economics in the 1990s. Dicken and Thrift (1992) make a comprehensive case for examining the enterprise as one way to comprehend the changing geography of production.

"... Enterprises are both exceptionally diverse in the scale and scope of their operations and, more significantly, that they operate within the framework of a vast and complex *network* of unequal power relationships. Such relationships reflect, amongst other things, the variety of ways in which the basic production chain or *filière* can be organised technically organisationally and geographically".

(Dicken and Thrift, 1992)

Dicken and Thrift were responding to Walker's (1989) paper that gives enterprises a much less central role on understanding the geography of capitalism. In a sense, Walker (1988, 1989) and Storper and Walker (1989) were according regions, indeed space itself, a more prominent place in capitalism. Implicitly, they adopt a view that approaches the analysis of production from the perspective of the territorial complex or regional production system.

In our views, such sets of relationships between capitalism and territory cannot be understood without investigating enterprises in relation to the "in which they function". By investigating enterprises within the wine industry, we cannot avoid considering the other activities that these enterprises colonise. We approach here the difficult matter of defining an industry, something that we do not attempt to resolve. We believe, however, that it is partly defined by the enterprises that are involved in the "industry". Nevertheless, for those enterprises constituting the industry their interconnectedness with other "industries" that they are also involved in must also be investigated. We are not alluding here to the well-worn idea of linkages but to the other activities ("industries") in which these same enterprises are participants.

Recent developments in the economics of institution provide a useful entry to revisit work on the *filières agro-alimentaires* considered as a typical example of localised production systems. In the extension of

Williamson's (1985, 1991) work, a recurring question in the economics of organisations is the existence of hybrid forms of organisations between the market and the firm. These hybrid forms exist between the two polar forms of the organisation of economic transactions – the market and the organisation. In governance by the market, the firms, more or less identified by a product or a domain of activity, exchange their goods on standard markets. The efficacy of this canonical form of the economic relationship come up against the existence of costs of transactions among firms, that brings us back to the different forms of uncertainty in the exchange relation. In contrast, the organisation, in the sense of an integrated administration, corresponds to a form of governance in which the firm integrates all of the functions necessary to its activity. In this case, the uncertainty inherent in the exchange relation is reduced and the costs of transaction minimised. The firm is responsible to itself for the costs of administering the organisation.

Between the organisation and the market, C. Ménard (in an extension of Williamson's 1991 work) develops the idea of hybrid forms of organisation. In a general fashion, these correspond to creating conscious circumstances for exchange and co-operation among protagonists that control specific and complementary assets. There is significant interdependence among the different parties but equally a preservation of the autonomy of each to the extent that they maintain their property rights. As Williamson (1996) suggests this involves long-term contractual relations that preserve the autonomy of the parties but in comparison to the market provide specific supplementary safeguards in the transaction. This hybrid form corresponds to a specific form of governance. Relations between the parties are regulated according to the principle of authority whereas the running of organisations rests on the notion of hierarchy. Ménard (1996) provides a concrete application of this framework for analysis of one *filière agro-alimentaire* locality-labelled poultry.

We propose that the *filières agro-alimentaires localisées* may be analysed effectively as a type of hybrid organisational form. One of their common particularities is that they are territorial organisations in the way that Jayet (1996) used the term, in which the specificity of the participants is at least partly associated with their localisation and the nature of the production process. Geographic proximity plays a role in the relationships established by the protagonists. To develop the study of

filière agro-alimentaire in this framework of analysis leads to emphasising the following key questions.

- What is the degree of stability of these hybrid forms between the organisation and the market ? This general question aims in particular, on the one hand, to give an account of and explain the reasons for the evolution of these systems of production. The hybrid forms may be, according to the case, closer to an integrated organisation or closer to the market. On the other hand, it is also useful to explore the similarities among organisational forms in the same sector or domain of activity. This question is particularly relevant in the case of the agro-commodity chains involved in the production of quality wines. One of the distinctive features of these *filières* is their territorial anchorage. There is good cause to establish the role of territoriality in the degree of stability of these organisational forms while the applicability of historical and comparative approaches for understanding these questions is undeniable.
- To what extent are the methods of governance of these *filières* specific ? In the case of the French systems, it seems clear that authority (delegation by judicially distinct entities for the power of decision over a subset of their domain of action) is exercised under quite different forms, that correspond to the diverse possibilities described by Williamson or Ménard (1997). However the existence of *ad hoc* institutions (some of which are strongly territorial and others less so) is also a strong tendency, even if it is not systematic. This leads us to assume that in general these systems are relatively strongly administered. It seems to us that these institutions, even when they derive from the same judicial mechanism, (this is particularly the case for the local, regional or interprofessional groups associated with the *filières d'appellation d'origine contrôlée*) play a role more or less formal and constraining in the running of these systems. According to us, they intervene differentially according to modalities that need to be made explicit.
- What are the mechanisms for sharing the rent generated by these specific and localised organisational forms ? In fact it is a question of quasi-rent, if we define it as the surplus generated by co-operation among those involved compared with the remuneration that each would obtain in the absence of organised co-ordination. The hybrid form is characterised, from this point of view, as a method of combining resources to generate rent while keeping

separate the property rights of all of the parties. In addition, the question of sharing the rent arises in a more specific fashion in the case of these *filières* when a part of the production process is organised around family units and another part around fully capitalist enterprises. The logic of profit and of social reproduction of the two differs fundamentally.

Choosing an agro-commodity chain as the empirical example offers advantages. Within the wine industries of all nations are enterprises that are fully capitalist in their operations and others that are family-based or simple commodity producers. Moreover, the two are often aligned in particular ways in the *filières*. They must interact as part of the same networks, although each is also likely to have their own distinctive associations. In the wine industries of some countries, family-based enterprises commonly transform themselves into capitalist organisations. By having these two forms of production – capitalist and simple commodity producers within the same industry we hope to be able to illuminate some of the questions about the organisation of enterprises that are posed by Dicken and Thrift (1992, 282). Indeed, the late twentieth century approach to analysing complex organisations has many similarities with the approach adopted to study family organisation. This is clear in the work of Zukin and Dimaggio (1990, 23) who point out that "the distinctive contribution of the new studies in economic sociology is their emphasis on the interconnectedness of structures and capital – in other words of power, culture and organisation." Out of this sort of work has grown the burgeoning literature on the economics of conventions.

Production that is organised around families is the quintessential example of flexible labour relations, pluriactivity, and social interaction at the community and locality scale that are linked to regions, to nation states and beyond. Watts (1996, 236) identifies the contribution that agrarian studies brings to some of the debates about the evolution of all industries. He uses the examples of the relationships among agrarian industries and industrialisation in the work of Harriss-White (1995) and Wood (1995) where "...the economic linkages are regarded as the outcome of social relations shaped by local institutions but embedded in relations of power, trust and reputation." Much of the work that he references has a strong locality/regional emphasis. Again, it seems to us that analysis from the perspective of both the region and the enterprise in the agro-commodity chain are necessary if these processes and the spatial connections are to be teased out.

In the analysis of *filières* one dimension that is frequently lacking is the role of territoriality at different stages of the production chain as it relates to the social networks of the different enterprises involved. Because wine is a land-based system of production, territory is more explicitly implicated in the organisation of the *filière*. In considering the organisation of wine enterprises in New Zealand and in Burgundy, and particularly their territorial organisation, at least five themes demand investigation. In both countries, the agro-commodity chain, from grape growing to final demand, is partitioned differently by the various enterprises that are involved. Some, for instance, engage only in grape growing, while others combine the whole chain from growing the vine to marketing. Increasingly, specialist enterprises are emerging that service a limited stage of the production chain. Second, at each stage of the chain, the territorial organisation of the enterprises is distinctive. Grape growers have a different relationship with territory, and different spatial reach, than firms involved in the marketing of wine. Third, the relationship of the firms involved in the wine industry must be related to their other activities. Wine firms are sometimes part of larger corporate entities involved in a variety of other activities. These larger corporate organisations influence the nature and behaviour of the part of the firm involved in wine production. Fourth, the French and New Zealand enterprises operate within different regulatory environments. We will argue that, while this is true, they both use territory, and territorial images, in similar ways in their marketing and other operations. Indeed, some of the observed differences in the organisation of firms in the two regions may be more apparent than real as they attempt to overcome their own territorial limitations. Finally, the social and interprofessional organisations of the two industries have their own territoriality that must be examined. These five themes need to be set within the two forms of production that exist within the industry – fully capitalist firms and the larger number of simple commodity producers - family firms - that are found in both countries.

2. THE WINE *FILIÈRE* IN NEW ZEALAND AND BURGUNDY

2.1. The wine industry

In its simplest form, the wine *filière* is straightforward. The main sequences are the growing of the grapes, the making of wine, its bottling and packaging, its

distribution, and its selling. For a complete analysis, a more fine-grained subdivision of each of these main stages is necessary. But for both sequences – the basic and the more detailed – each stage in the process needs to be more fully specified in three ways – the location of the process, under whose ownership it is being carried out, and the involvement of the owner in other activities or industries. Traditionally, several of the primary stages have been carried out by separate owners. Grape growing, for instance, has often been carried out by landowners who may also be growing other crops. The grapes are sold to winemakers or other systems of sharing are devised. Even fully-integrated winemaking firms often leave their distribution and selling of the wine to other organisations, many of which are specific to specific markets. In recent years, some of the activities that have been traditionally been carried out by the winemaking firm have begun to be carried out by specialised firms. Winemaking itself is one example. In some countries, firms specialising just in processing grapes from bunches to finished wine have emerged. They are likely to be more common in regions growing a range of varieties that are picked at different dates. Otherwise, it is difficult to use the expensive equipment over a sufficiently long period. Enterprises specialising in the bottling of wine as a distinctive separate activity have also emerged in regions such as the *Côte viticole*. Specialised mobile bottling plants servicing small producers are able to amortise their investment in equipment over shorter periods than the individual wineries and offer machinery that is more advanced. More activities that are ephemeral are also becoming associated with the wine *filière*. Table wines are made to be served with food so that restaurants attached to wineries are both an outlet for their production and an advertisement for their product. The inclusion of restaurants with wineries in the same organisation, a common association in New World countries, is very rare in France. This simple geographic difference poses potentially crucial questions about the arrangement of the *filière* and hybrid forms in specific regional contexts.

In theory, almost any element in the chain from grape growing to the consumption of the wine may be carried out by a separate enterprise. For only some of them is it practicable to contract or purchase the service. In distinguishing the activities, it may be useful to separate those that contribute to the core activity – the production of quality wine. Grape growing is separable, but for many wines, it contributes so fundamentally to quality that the winemaking enterprise strives in a variety of

ways to have it fully under its control. Ownership is the most complete form but also the most expensive.

2.2. The New Zealand and Burgundian industries and *filières*

The wine industries of France and New Zealand are of quite different scales and have quite different histories. Although grapes were first planted in New Zealand soon after European settlement in the 1830s, the modern industry developed in the last 40 years. Only during the last 20 years has the country emerged as an exporting country. With almost 10,000 hectares of grapes in production, the New Zealand industry is very small compared with France's area of almost one million hectares. Compared even with Burgundy's 25,000 hectares (*Yonne, Côte d'Or and Saône et Loire*), the New Zealand industry is quite small. In vineyard area it is comparable to *Saône et Loire* and a little larger than *Côte d'Or*. It also aspires to be an industry producing quality wines and has some signs of successfully achieving this. On its largest market, the competitive British one, its wine has the highest average price of any country's. In recent years, New Zealand has produced 400 and 600 thousand hectolitres of wine annually compared with an annual sale of about 1,500 thousand hectolitres of Burgundian wines.

In analysing the territoriality of wine firms in New Zealand and France, it is essential to appreciate the different scales and environments involved. New Zealand is almost exactly half the area of France. Environmentally, the countries are different mainly because New Zealand is not part of a continent. Its maritime location ensures that only very small parts of it have anything like a continental climate. In addition, New Zealand has no equivalent of the southern France winemaking areas of the Midi where much hotter summer temperatures ensure that reaching high sugar levels in grapes is seldom difficult. Similarly, even the "cool climate" areas of France, such as *Alsace, Champagne, Burgundy, the Loire Valley and Bordeaux* have incursions of warm air from the interior of the European continent giving them higher summer maximum temperatures than most parts of New Zealand. In contrast, New Zealand's viticultural regions are all variations on the same theme. They are all cool climate with relatively subtle differences among them. In general, the winter temperatures of New Zealand viticultural regions are warmer than in the French regions, although this is less true for the grape growing

regions of the South Island such as Nelson, Marlborough, Canterbury and especially Central Otago.

Two main types of producers are present in the New Zealand industry. Family firms dominate New Zealand industry numerically with a total of over 700, more than half of which grow grapes but do not produce wine. However, a few large firms dominate the production of wine by purchasing grapes from about 400 specialised grape growers. In this sense the industry has some similarities with *Champagne*, although with an average area in grapes approaching 15 hectares these grape-growing properties are noticeably larger than the average in *Champagne* or *Côte d'Or*. The three largest firms, Montana Wines, Corbans Wines, and Villa Maria Wines, together make about 70 percent of New Zealand's wine, giving the industry something of an oligopolistic character. Many of the small specialist family wine producing firms grow all of their own grapes and often have the highest retail price for wines, averaging over \$25 retail for their wines, at the current exchange rate about 3.30 to the New Zealand dollar.

The enterprises in the Burgundian industry are of three main types - family firms, wine merchants (*négociants*) and co-operatives. The 4,200 family firms are generally of small size and specialised. Eighty percent of them have an area in vines of less than 10 ha and on only about 100 is paid labour more important than family labour. About 70 percent vinify part or all of their production. About half of these bottle and commercialise a significant part of their production and the other half sell the largest part of the production in bulk to *négociants*. The remaining viticulturists (about 30 percent of the total) sell almost all of their harvest to a co-operative.

About 20 co-operative wineries of variable size are almost all located in *Saône et Loire*. The largest has an annual turnover of just over 200 millions francs. These co-operatives are not generally found in the best-known parts of the Côte Viticole and they produce mainly wines of regional appellation, the lowest of the Burgundian hierarchy. They commercialise not quite half of their production, about 55 percent being sold in bulk to *négociants*.

About 120 *négociants* are found in Burgundy. In the majority of cases, they originated as family enterprises of the region. However, several of them have recently been bought by enterprises from outside the region.

Twelve have annual turnovers of more than 200 millions francs, with the largest having a turnover of 1,400 millions per annum. Two features distinguish the *négociants*. Some of them are closely involved in the production stage owning vineyards in some of the most reputable communes. On the other hand many of them buy and sell wines of other regions. Only a quarter of them handle exclusively Burgundian wines. The Burgundian *négociants* are paradoxically strongly territorially anchored while trading wines that derive predominantly from other regions.

3. MONTANA WINES AND THE BURGUNDIAN *NÉGOCIANTS* : TWO FORMS OF TERRITORIALITY

3.1. Montana Wines

To illustrate the territorial partitioning of the agro-commodity chain for the New Zealand capitalist wine producers, Montana Wines, the largest of the New Zealand wine companies, is used as an example. It has access to about 3000 hectares of land in vines, about half of which is owned by grape growers under contract. It crushes about one-third of the grapes produced in New Zealand. The company has a distinctive geography. Its Head Office and bottling plant are in Auckland (Mt Wellington) in light industrial district. Here too are most of its facilities for making and storing white wine and some of its red. The earlier parts of its commodity chain are more dispersed. It has large areas of grapes in Gisborne, Hawke's Bay and Marlborough. In each of these regions, it also has grape crushing equipment and wine storage facilities. Each of the regions has its own varietal specialities.

The territorial history of Montana is revealing because the regional sequence of this expansion shows a definite pattern. It began as a small family business on the north-west urban periphery of Auckland in 1941. When Frank Yukich, one of two sons, took control of the enterprise in 1961 the firm had less than 5 hectares in grapes. He began an aggressive expansion. Its first new vineyards at Mangatangi were quite close to Auckland on former dairy farming land to the south-east of the city. At the time, and even more clearly in retrospect, the location offered few natural environmental advantages other than reasonable proximity to the original winery. Soils there are heavy and fertile and the number of rain days high. This was at a time when

knowledge of canopy management of vineyards in New Zealand was rudimentary and the knowledge to suppress vigour and high yields limited. It was not surprising that this Mangatangi vineyard of over 100 hectares did not remain in production for very long. Montana made its second expansion in the Gisborne region on the East Coast of the North Island. This time, rather than using its own capital to buy the land and grow the grapes it let contracts with local land owners to grow grapes on its behalf. The Gisborne strategy offered two main advantages. It removed the capital cost of vineyard development from Montana's balance sheet although the nature of its contracts with growers was later to cause the company some difficulties. Second, it chose a region that was environmentally more suited to the vine having lower precipitation and higher hours of sunshine. Moreover, at this stage of the evolution of the New Zealand industry, when the general quality of the wine being made was at best mediocre, several varieties of grapes could be cropped at high yields in Gisborne without compromising quality too much. The white grapes for cask wines popular at the time could be economically produced in these conditions using varieties such as Muller Thurgau and some of the Muscats.

Montana's next regional foray was into Marlborough from the early 1970s. This time, it used the joint strategy of both buying land and letting contracts. Land prices in Marlborough were much lower than in Gisborne, where the versatility of the soils resulted in competition from a variety of other intensively grown fruit and vegetables. In contrast, in Marlborough land was being converted from quite extensive sheep farming into vines so that the price was initially low. Montana purchased 1600 hectares at very favourable prices. The success of *Sauvignon Blanc* in Marlborough was a windfall for Montana. No trials had been held and nobody could have predicted the success. From the early Marlborough vintages in the late 1970s the *Sauvignon Blanc* wines had liveliness and regional, varietal specificity that made them instantly recognisable. They were soon the white wine flavour of the 1980s, notably on the British market.

Montana's fourth major expansion occurred in the late 1980s and 1990s, this time into the Hawke's Bay region. It again required large capital expenditure. Although it had always sourced some grapes from Hawke's Bay, particularly for its red wines, it did not have any dedicated winery there or large areas of its own land. Its

experience in Gisborne, and Marlborough had shown that *Cabernet Sauvignon* and its blends were not ideally suited to either location. This decision coincided with the realisation that it should be increasingly be concentrating on producing wines of high quality in New Zealand and importing and marketing any red wines for day-to-day drinking. Moreover, if it were to be involved in producing *Cabernet* blends of real quality, it should own a high proportion of its own vines while also ensuring that the quality of the viticulture on land owned by their grape growers be of the highest quality. Changes in the organisation of the New Zealand industry saw both a winery and large area of vines become available for purchase. The McDonald winery had a marketing value because its original owner, Tom McDonald had been one of the pioneers in making *Cabernet Sauvignon* wines of quality during the 1960s with his 1965 *Cabernet Sauvignon* being something of an industry benchmark. When Corbans wines had excess plant and vineyards, after an earlier merger with McWilliams-Cooks, wines they put the former McDonald winery on the market. Montana bought this in 1988 and have since spent considerable capital modernising the winery for the production and ageing of red wines, creating a wine museum and restaurant, and in the process, something of a tourist attraction.

In the development of its regional and varietal specialisations Montana Wines has sought associations with prestigious French firms. In 1987 it entered into an agreement with Deutz, the *Champagne* house, for technical collaboration and a joint venture in the production of its sparkling wines based on Marlborough. This involved lifting the quality and reputation of Montana's already successful Lindauer brand and extending it to Lindauer Reserve with a view to increasing exports as well as strengthening its local position. It also included the production of a joint brand Deutz-Montana for marketing in both New Zealand and internationally. Montana's Lindauer has had considerable success on the British sparkling wine market and been a main contributor to lifting New Zealand's exports of sparkling wine. In the consolidation of its production of *Cabernet* blends in Hawke's Bay an association was formed with the Bordeaux firm, Cordier. The advantage here is again mainly technical, although they have some marketing associations. The Chief Executive Officer of Montana (and former winemaker) wished to make quality red wines based on *Cabernet Sauvignon* blends. He was convinced that Hawke's Bay was the only region in New Zealand capable of achieving this on a

regular basis. To reach the level of quality, that he was seeking, required a more complex tannic structure and finesse. Bordeaux was the obvious region to seek such experience. In order to achieve complexity of tannins Montana are sourcing their grapes from a variety of soils in the Hawke's Bay region and using winemaking techniques to bring out these qualities. To achieve complexity of tannins, they are increasing their proportion of grapes grown on soils with high clay content by purchasing land in the Te Mata area, the locality pioneered by another enterprise. Wines in the production of *Cabernet Sauvignon* and *Cabernet Sauvignon* blends with finesse.

Thus, Montana Wines is a national company with an administrative headquarters in the main market of the country which is also the region where it originated and the main export port for wine. All of the wines it produces are bottled in Auckland and most are aged there. But the initial stages in the commodity chain are found in three regions – Gisborne, Hawkes Bay and Marlborough. The grapes nearest to its winery are now grown over 300 km away. In each of its viticultural regions, specialisation by variety and types of wine is beginning to emerge. Gisborne remains the primary region for its Chardonnay production. Grapes from there are used to make its largest regional brand Gisborne *Chardonnay*, widely regarded as one of the best value-for-money *Chardonnays* in New Zealand. Hawke's Bay is now the centre for Montana's premium red wine production made from Cabernet Sauvignon blends. Sauvignon Blanc and Chardonnay are also produced in Hawke's Bay. Marlborough is Montana's regional centre for sparkling wine and *Sauvignon Blanc*. *Chardonnay* and *Pinot Noir* are the two varieties for its sparkling wines. As for other regions, these wines are bottled and aged at its Auckland winery. Montana's geography of production results in a definite regional division of labour. Each of the major regions has its own winemaker located there and the rest of the labour force reflects the regional specialisation. Montana's *filière* has a definite regional differentiation and territorial dimension.

3.2. The Burgundian *négociants* : myths and realities of the regional and territorial association

Compared with New Zealand, none of the Burgundian enterprises is of sufficient size to dominate the regional production system. Nevertheless, among the various

forms of enterprise, the *négociants* are a central category in the system. The Burgundian *négociants* are often considered as firms whose activities are centred on the region. This is certainly the image projected by all of the main *négociants*. Their role is depicted as the maturing, blending, bottling, and marketing of wine through wholesalers and other distributors. Such an image needs refining. The strategies of the enterprises and the functions that they assume diverge noticeably from their traditional role. In addition their territorial strategies are more complex and their territorial anchorage merits further discussion and analysis.

The interviews and other work we are currently conducting with the Burgundian enterprises leads us to distinguish three main types of *négociants* in the region – producer-merchants, industrial *négociants*, and service *négociants*. The industrial *négociants* are the most important in size. However, we elaborate here only on the first group that resemble the archetypal Burgundian *négociants*. The group is made up by about 50 traditional firms, established in Burgundy for several generations as evident from their well-known names – Bouchard, Latour, Charton and Trébuchet, Drouhin... These enterprises of family origin, are of medium size with annual turnovers of between 20 to 250 millions francs and between 100 employees for the largest and a few salaried employees for the smallest. Aligned to viticultural properties, from which they have often originated, they usually own a reasonably large area in vines, predominantly in the most prestigious appellations. *Négociants* own close to a quarter of the area in vines classified as *1er* or *Grand Cru*. On average, they own about 40 ha of vines with the largest family *négociant* reaching 130 ha. Their viticultural domains may be divided into two parts – a central core (Aloxe-Corton for Latour, Beaune for Bouchard) and a mosaic of small, often isolated, parcels acquired progressively in a land market that is very tightly held and contested by the families of the villages.

Wines from their own domains constitute about half of the *Crus* placed on the market by the *négociants*. Having a domain as part of their firm is considered indispensable for the projection of the image of a *négociant*. It is also a guarantee of a reasonable supply of a range of rare wines of high prestige. The *négociants* traditionally acquire the remainder of their *Crus* from a relatively stable pool of wine growers (*vignerons*) with whom they have established a trusted relationship over a long period that is tacitly renewed

annually even though there are not generally written contracts between the parties. At the same time, these *vignerons* mature and sell an increasing proportion of their production. From this derives the necessity of trust between the two parties over the quality of the wine sold to the *négociants* in comparison with that sold by the *vignerons*.

The *négociants* rely heavily on the prestige of their names and their *Crus* but they are constrained in their backward linkages by the dominance of the vintners families in the land market and have, in the past, not been attracted at investing in the logistics of marketing or in other forward linkages of distribution. They have seen their development opportunities in increased production of wines of intermediate quality within Burgundy or by investing elsewhere, either in other less prestigious wine regions of France where viticultural land is more accessible, or overseas in the new-world producing areas. In France, they have also been increasing the quantity of bulk wine that they commercialise without tarnishing their images as enterprises centred on Burgundy.

These former family enterprises have also been transformed from the point of view of their capital and their control. Certainly, the majority of the traditional *négociants* continue to be independent enterprises with family capital, and this independence limits their capacity to mobilise the necessary capital for growth. But, since 1990 about 20 of these *négociants* have chosen, by choice or by necessity, to open their capital to external groups to fulfil their objectives or to resolve their financial difficulties resulting from difficult years, sometimes even coming entirely under external control. About a dozen of the biggest Burgundian *négociants* are today controlled by importers or by foreign distribution companies, several others have come under the control of French wine companies, others have sustained the external growth of several large Burgundian *négociants* involved in different strategies for development that we have called "industrial".

Thus, even for that group of Burgundian *négociants* apparently most firmly territorially based, the question of their degree of localisation and their territorial strategies are complex because it intersects with their local and regional land holdings and the provision or control of the capitals of the enterprise.

4. TERRITORY IN THE REGULATION AND GOVERNANCE OF THE INDUSTRIES

4.1. The differing legislative environments

In a complete analysis of the legislative influences of the two regions the taxation regimes and tariffs, as they apply to different forms of enterprise, need to be included. We concentrate here on comparing the territorial effects of different systems of geographic indications of the European and New World examples, the spatial influences of which are more fully discussed in earlier papers (Moran, 1993a ; 1993b). As will be apparent from the behaviour of its enterprises, the New Zealand wine industry has a much less restrictive geographic legislation linking grapes and wine to territory than France. It is confined to the truth in labelling over regions and varieties under legislation attached to the General Agreement on Tariffs and Trade Act (GATT) and to the purity of wine under health legislation. If wine is labelled as originating from a defined region (Auckland, Gisborne, Hawke's Bay, Marlborough etc), or from a named variety of grapes, at least 85 percent of the wine must originate from that region or variety. Blending across regions and varieties is permitted but must be indicated on the label. Thus, the New Zealand legislation is very liberal compared with the restrictions on French *Appellation d'Origine* (AOC) and Burgundian growers whose varieties, vine spacing, yields, trellising and some winemaking techniques are specified. All of these, other than permitted additives in wine, are at the discretion of the grape growers and winemakers in New Zealand.

Given the noticeable differences in the legislative environments it is initially surprising that the differentiation of wines by producers in New Zealand shows some surprising similarities with France. Almost all of the New Zealand producers make a hierarchical sequence of wines defined by quality and price, although these are identified by brands they choose themselves, rather than a specified, common system of territorial differentiation. Villa Maria Wines, the third largest company, for example, maintains three generic labels deriving from its original three companies that were merged in the 1980s – Villa Maria, Vidals and Esk Valley. Within each of these, they differentiate four main levels of wine. The most expensive are the Reserve wines (\$NZ 25-35). They are usually derived from a

single vineyard and from grapes of the highest quality. Below this are their Cellar Selection wines, usually a blend of different winemaking sometimes from the same region, sometimes blended across regions (\$NZ 17-22). The third level is referred to as Private Bin Wines, which according to variety (ies) are sometimes from a single region and sometimes from grapes originating from more than one region. For instance, Villa Maria, like all major companies has a Private Bin Gisborne *Chardonnay*, a brand that capitalises on the regional reputation that Gisborne has achieved for making fruity, full flavoured *Chardonnay*. It can be grown relatively inexpensively with quite high yields. Villa Maria's Private Bin wines normally retail at between \$NZ 12-15. The remaining wines, the fourth level in the hierarchy, sometimes sold in bottles, sometimes in bulk, are of lower price and are the equivalent of the *Vins de Pays of France*.

The process of achieving this hierarchy of wines begins with separate winemaking of grapes from different parcels of land. In the case of *Chardonnays*, for instance, the blending for the Cellar Selection Brand is achieved by vinifying wine from all parcels of grapes (their own and contract growers) separately. After barrel ageing, the winemakers and others in the company conduct a series of tasting before deciding which of the winemaking will be blended. The particular mix of parcels varies from vintage to vintage.

Although the wine enterprises are making their own decisions about blending and labelling, territory plays a major role in identifying particular wines. The consumer relates the quality of particular wines to the enterprise, and to the variety (ies), and to the locality or region of its origin. Grape growers and winemakers of any region are free to plant any variety of grapes. Gradually, as they accumulate more experience of working in the different natural environments of different regions and localities, they are beginning to modify the varieties they are growing. Regional differentiation in varieties is beginning to occur, although this is continually being revised and modified.

4.2. Professional organisations

Delfosse and Letablier (1995) remind us that appellation systems are characterised not only by a product but also by territorial organisations. The same is true of all rural societies not only those so obviously regulated but also those where appellations are found. But the forms

of different organisations need to be specified. In doing this, the term "governance" that has received considerable exposure in the recent literature is helpful. A wider term than government, it seeks to include all of the organisations, local, regional, or national, formal and informal that support the social and economic organisation of production. The most obvious are the professional organisations that are both sectoral and regional in their organisation but the mutual aid societies and other social groupings and practices that deepen local networks and associations need to be included.

Comparison of the organisation of the professional organisations in the wine industries of Burgundy and New Zealand are revealing. In the case of the Burgundian industry, the professional organisations represent the different forms of production and their place in the *filière*. The family firms are organised into syndicates by commune. The *Institut National des Appellations d'Origine* interacts with these syndicates over various aspects of its classification and administration. Syndicates make application to modify the appellation of parcels of land within their commune. In all but a few cases, this is an increase in the status of an appellation most commonly from a communal (village) appellation to premier *Cru*. This constant consideration and modification of the appellation system belies its static image. The INAO also delegates to these syndicates the responsibilities for the maintenance of standards of the wine made in the commune and other practices of the appellation. Like all organisations of their type, the syndicates strongly advocate and protect the interests of their members by lobbying locally, regionally, and nationally. Thus, the syndicates have a strong position within the politics of their production chain. They maintain this because they are integrated into it by being well represented in the various stages of the production chain as the growers and processes of grapes as well as the transformers and sellers of wine.

The *négociants* have their own professional organisation : la *Fédération des Négociants Eleveurs de grande Bourgogne (FNEB)*. As it is Burgundy-wide, the number of members is larger than any of the individual communal syndicates. Its focus, therefore is regional, although inevitably because some of the syndicates are sub-regional in their focus (for example, with a range of wines from mainly *Chablis*, or mainly *Côte de Nuits*, or mainly *Côte de Beaune*) – they are also sub-regional in

their interests. Nevertheless, because they make their profits from the commercialisation of wines from Burgundy throughout France and by export, their focus is primarily regional. Their influence varies commune by commune according to the concentration of their appellation. In any single commune, as for example *Louis Latour* in Aloxe-Corton, they may be politically powerful because of their dominance of some appellation. *Latour* owns more than half of the *Grand Cru* Corton (*Corton Charlemagne* and Red Corton). His image and prestige depend upon the maintenance of its status.

The overarching organisation, the federal system for Burgundy, is *le Bureau Interprofessionnel des Vins de Bourgogne (BIVB)*. Its membership is derived from the syndicates and the *négociants*. This organisation is authorised to collect a tax on wines commercialised from its jurisdiction, that is the three *départements* of *Yonne*, *Côte d'Or* and *Saône et Loire*. This is a convenient and functional definition from the perspective of the modern wine industry although many other definitions of Burgundy are possible.

Professional organisations in New Zealand are also based around the commodity chain. Until the creation of the Wine Institute of New Zealand in 1975, two organisations existed. These were regional. One of them, the New Zealand Viticultural Association, was based in Auckland and consequently, was dominated by the mainly small producers who were predominantly emigrants from the Dalmatian coast of Croatia. The other organisation was based in Hawke's Bay. At that stage of the evolution of the industry it represented the larger New Zealand producers who were located there such as the Australian subsidiary *McWilliams Wines*, *Vidals* and *Glenvale Wines*. The creation of the Wine Institute of New Zealand in 1975 was a considerable achievement because it brought these two antagonistic groups together. The voting structure to decide the membership of the Board of Directors of the Wine Institute was devised to ensure representation of different types and sizes of enterprise. Three categories based on production capacity were decided. The largest (over 2 million litres of production annually) until recently had only three companies: *Corbans Wines*, *Montana Wines* and *Villa Maria Estate*. In 1997, it was joined by what are now *Nobilo Vintners*. These companies have automatic membership of the Board of the Institute. Wine producers with annual production of between 200 thousand and 2 million litres annually elect three

members, and those producing less than 200 thousand litres annually elect three members. Such compromised democracy recognises the importance of the largest companies in the structure of the industry. Alongside these representational issues were the compromises in the early years of the institute over leadership of the industry. Since 1975 there have been 7 Chairmen of the Board of Directors, four of them from the lowest two categories of producers and three from the largest category.

However, with the rapid expansion of the wine industry that followed, new tensions emerged. Wine companies that were rapidly expanding, notably *Montana Wines* let contracts to farmers to grow grapes on their behalf. Thus, a new group of industry participants was created who had no voice, other than their contracts, in the industry. The Council of Grapegrowers of New Zealand was formed in 1968 to represent these new participants. The organisation is national but has strong regional groups who retain their own finances. It is currently funded by a levy under the commodity levies (winemaking grapes) order of 1998 which imposes a levy of between 0.5 and 1.5 percent of the farm gate price of all grapes sold for wine or juice. The organisation of grape growers was set up to "to promote the interests of grape growers generally, to accumulate and disseminate information of value to, or pertaining to the grape industry, and to promote, foster, and encourage the production, processing, distribution and consumption of grapes and all products derived from them". In recent years, its collection and dissemination of regional and variety specific organisation prices for grapes has become an essential source of information for growers.

The regional of professional groups in the wine industry mirror its regional evolution and the regional structure. Three of the more recent grape regions – *Nelson*, *Waipara* (Canterbury) and *Central Otago* – make no distinction between grape growers and winemakers in their organisations. These three regions are small in area in grapes and in number of producers and all have an industry structure that is different from the main wine regions. None of the major wine companies yet source large quantities of grapes from these regions. Their grape markets are largely internalised and several of the winemakers started out as grape growers, as is the case in other regions. It is not surprising that the grape growing industry has strong regional organisations. Grape growing is land-based and the local participants

have technical and other needs that are easier to meet locally. Proximity is the basis for regular and often informal meetings. To some extent, winemaking is the same. Indeed in all regions winemakers have regular, often informal, meetings where they taste and discuss wines and share their knowledge. However, even here sectoral interests sometimes override regionality. *Pinot Noir* producers have been holding their own regular meetings over the last few years to share their knowledge and improve their technical understanding. In calling itself Waipara Winegrowers Incorporated, this small Canterbury organisation is showing the way to a likely future professional organisation of the New Zealand Industry.

In 1998 and 1999, the wine industry has been discussing proposals to reorganise their professional structure. The proposal is to form an overarching professional group - Winegrowers of New Zealand - with representation from the Council of Grapegrowers and from the Wine Institute of New Zealand. The proposal recognises the integrated nature of the wine commodity chain while the name encapsulates the aphorism that great wine is made in the vineyard. Since the early 1990s, the President or Vice-President of the Grapegrowers has sat on the board of the Wine Institute and the two organisations have jointly funded research. The proposal suggests a membership of 4 representatives from each of the two organisations who would elect their own chair. In the Wine Institutes 1998 Annual Report, the proposal is discussed under the heading of "Reforming Industry Organisation". In the discussion the services provided by the different groups are set against the costs that they impose.

This move towards centralisation of the professional organisation of the industry has already begun with the decision in 1998 to incorporate the New Zealand Wine Exporters into the Wine Institute. The Exporter's group had been developed and funded by a group of exporters, initially to promote generically their wine on the British market by employing a representative and office staff in London. Companies promoted their own brands independently.

5. TERRITORIAL CONVERGENCE BETWEEN THE NEW AND OLD WORLDS

If the rules that govern the relationship between the wine industry and territory are examined in isolation, it seems that in a country such as France the relationship

is much stronger than in New Zealand. When the analysis is shifted to the organisation and practices of the enterprise a different picture emerges. Enterprises in New Zealand have relationships with different localities and regions that are intricate and essential to their strategies. These take several forms and are often aligned with the form of the enterprise - whether it is a family business or a corporation. The large corporate wineries, partly because of their size, have their production chain distributed across several regions. They use these regions to grow different varieties of grapes and to gain different qualities in the same grape to enhance the qualities in their wines. This is true of both white and red varieties. Localities in the same region are used in a similar fashion, especially to provide tannins and other flavours and qualities to red wines. Hawke's Bay where the soils and climate vary considerably over quite short distances, is a good example. By having vineyards, either their own or under contract, in different regions, the companies are able to provide wines with different qualities from grapes with different yields. They also manage their environmental risks through dispersion by region and by locality. It is unusual for the main wine growing regions of New Zealand to have similar climatic conditions in any single year and the risk of isolated conditions such as heavy hail storms striking more than one locality in the same region are also low.

Among such large enterprises, facilities for the first stage of transforming the grapes into wine are usually located close to where the grapes are produced, although, by using modern transport and technology, grapes can be transported considerable distances with limited effect on their quality. Because the major internal and export markets for wine are in Auckland, and this is the centre for the production of glass bottles, much of the finishing, ageing and packaging of wine is found there. For all of the multi-regional large wine companies and many of the smaller as well, Auckland is the distribution hub.

Family enterprises, especially the smaller ones, often have their total operation in one region. This juxtaposition gives them a different relationship with their locality at all stages from growing grapes through to the marketing of the wine. With their vineyards often in one locality their approach to vineyard management and winemaking is different. They are often in a position to know the qualities of their vineyard thoroughly because they work in it. As they often also make the

wine, they are able to begin creating their wine style by pruning for a particular yield of grapes. The adage that fine wine is made in the vineyard has real meaning to a family producer. They are the commodity chain. All stages of wine production for most family firms are conducted at the winery. They are able to minimise the time between picking and crushing and arrange all of the sequential processes through to bottling with minimum unnecessary movement of the wine.

In their marketing, family firms relate strongly with their locality. Because their grapes are from the entire region, their image and brands must relate to it. Local icons (Old Coach Road for Seifried in Nelson or Blake's Mill for Collards in Waimauku) are used to enhance their local identity. Small family firms sell a high proportion of their production from the cellar. Some of them, like Longview on the southern edge of Whangarei, sell all of their production from the winery, having to set aside small amounts so that they have some stock for restaurants and similar outlets. Being the only winery in the vicinity of a small city allows them this advantage. The local people treat them as their own. With a site on a main arterial route, they also benefit from passing traffic visiting their attractive vineyard and winery. Other small, elite producers like Dry River in Martinborough, are able to sell all of their wine by mail order within weeks of it being advertised. Small production of quality wines with national renown sees them maintaining a mailing list with a strong southern North Island emphasis. Like the Martinborough region as a whole they are adopted by Wellington and its region. Their marketing associations are themselves highly territorial.

The winemaking practices of many firms with grapes in different regions of New Zealand are analogous to the original concept of the *Cru* in France although at a quite different scale. The concept of the *Cru* as it was developed in France, and especially by the Cistercian order in Burgundy, related to different qualities of grapes from different parcels of land in the same location. Through generations of growing grapes and recording the character of the wine from different microenvironments within adjacent parcels of land. Thus in the Cistercian *Cru* of *Clos-Vougeot* each parcel was vinified in a separate lot to be assembled after barrel ageing according to the qualities of each parcel. Each year the mix of parcels going into the *Cru* was different. In general terms, both the qualities of wine deriving from different places and the qualities of wine deriving from different times were taken into consideration. Since the

break up of the *enclos* in Burgundy, this sort of blending has become impossible. Each of the owners in the former *Clos-Vougeot* now make their own wine from their own parcel of land. The potential of combining the different properties of the wines that derive from different parcels has now been lost.

Combining of grapes from different localities and regions into a single wine is practised by many New Zealand wine companies. All firms interviewed at this stage of the research vinify the grapes from different parcels of land separately. All have an *assemblage* of the various winemakings to construct wines of different styles and levels of quality. Some companies such as Villa Maria have a definite policy of tasting a variety such as *Chardonnay* from across the regions and their grape growers before making the decisions about the blends that will combine flavours and other qualities to make balanced and exciting wines. Such an approach is analogous to that formerly used in Burgundy. The difference is one of scale. With modern technology, it is quite straightforward to blend wine from different regions to deepen its complexity.

A degree of convergence is evident in the strategies of the capitalist producers of Burgundy and New Zealand, despite their quite different regulatory environments. Some of the Burgundian *négociants* are acting very like New Zealand producers as they attempt to produce a range of wine types by using territory in different ways. They continue to maintain their reputation for quality by maintaining their suite of Burgundian *Grand* and *1er Cru* vineyards, extending these where possible. The names of the well-established *négociants* are indelibly tied to Burgundy simply because they have always been regional in their association with the *filière* and its regional economy. But with the market for land increasingly tight in Burgundy, because the family producers are commercialising more of their own wine and extending their holdings, the *négociants* are left with little alternative but to use their capital and extend their wine supplies from elsewhere. This is where their convergence with New World producers is apparent. They extend their area in vines either in other parts of France outside the prestigious winemaking areas or by choosing similar areas in other countries. The locations that they choose for the non-Burgundian part of their enterprise are often environmentally benign with a high probability of ripening grapes every year, such as the south of France, California, Australia, Chile, or Argentina. In all of these, it is relatively easy to produce

grapes of reasonable balance in all years especially given the scientific advances in the control of wine-making. In addition, the wines that the *négociants* usually produce, even when growing in France are varietal ones in the New World tradition. Thus, they are producing wines that compete with the bottom end of the brands in the appellation system.

By growing *vins de cépage*, they are hedging their bets. New World wine producing countries have increased

substantially their share of the international markets in the last two decades by associating their wines with particular grape varieties. It is unlikely that consumers (outside the wine aficionados) even know the grape varieties of the prestigious appellations of France, let alone Italy and Spain. It is sensible, therefore, for the *négociants* of many regions of France to have some wines produced under varietal labels. The appellation system prevents this for wines under AOC but is quite possible for *vins de pays*.

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