

Oregon Family Wineries: Planning for the Future

L.M. Archer



Brooke Robertson of Delmas

RICHARD DUVAL

IT'S A BRISK, WINTER morning in southern Beaune. Soft sunlight spills across the limestone walls of Clos des Mouches, across the lane and into the conference room of Maison Joseph Drouhin's satellite winery.

Inside, Véronique Boss-Drouhin, snug in coral cardigan sweater, settles down to rows of neatly labeled wine samples arrayed along a linen-draped table. Across from her, daughter Laurène Boss, cozy in a white wool scarf, powers up the laptop.

It's Oregon winetasting time at Maison Joseph Drouhin (MJD), one of Burgundy's most prominent domaines. It's also one of the most pioneering. In 1987, the family ventured to Oregon, establishing Domaine Drouhin Oregon (DDO) in Dundee and Roserock Oregon in Eola-Amity Hills in 2013.

In doing so, the Drouhins joined a large cadre of family-owned wineries in Oregon. According to the Oregon Wine Board, family-owned wineries account for nearly 70 percent of all state wineries. But recent acquisitions



Véronique Boss-Drouhin of Clos des Mouches

COURTESY OF DOMAINE DROUHIN OREGON



COURTESY OF DOMAINE DROUHIN OREGON
Laurène Boss of Clos des Mouches

by major brands, like Champagne Bollinger, Santa Margherita and Constellation, leave many such family wineries worried about the future.

Patrimoine

Fifth-generation Maison Joseph Drouhin plans for the future through the Burgundian philosophy of *patrimoine*. This concept honors past generations while safeguarding future generations—principles applied at Domaine Drouhin Oregon and Roserock Oregon, too.

Founded in 1880 in Beaune by Joseph Drouhin, the negociant house initially bought grapes and

wine to blend and resell under their own label. Second-generation Maurice Drouhin expanded into land ownership; in 1921 he purchased the premier cru Clos des Mouches vineyards to create estate-grown wine. A World War II French Resistance hero, Maurice eventually entrusted the reins to third-generation Robert Drouhin, who pushed the family's holdings beyond the Côte d'Or into areas like Chablis, the Mâconnais and Oregon.

Today, Robert Drouhin's four adult children manage all aspects of the family business. Though originally slated to take over for his father as head of the family domaine, eldest son Philippe first attended Lycée Viticole de Beaune where he developed an interest in organic and Biodynamic vineyard practices. Other family members joined him, pursuing their own areas of interest within the company.

"For us, it was just great," explained winemaker Véronique Boss-Drouhin. "Philippe, Frederic and Laurent, we each have the field that we liked. Philippe is vineyards. For me, it's the winemaking. Frederic and Laurent are mostly in sales and marketing. So we share the duties, which are very demanding."

Interestingly, Véronique Boss-Drouhin recalls no pressure to enter the family business. She does recall feeling a pull towards honoring her family's heritage around the age of 13 or 14 when she started traveling and tasting with her father. "Then you realize you're part of a heritage, of a history, of a culture, of amazing wines. And that was when I said, 'Wow, it would be sad that this goes nowhere.' So, for me, it was really at that moment that I said, 'Well, I like it.'"

Boss-Drouhin's daughter Laurène represents the fifth generation at Drouhin. "I never thought that it was something Laurène should do because she's the oldest child," said Boss-Drouhin, "even though she always liked to taste wine. So, between when I was growing up and when she was growing up, I wouldn't say there was any guidance difference. Whatever she was going to do, like me when I was growing up, you had to try and do it well."

But Laurène Boss also acknowledges the pull of *patrimoine*. She noticed it about seven years ago while working at LVMH (*Moët Hennessy*). "We are just passing through

time," observed Boss. "But Maison Drouhin and DDO will stay. So yeah, I would say 23 to 24 years old, I really got hit by, 'Oh, I have something. The legacy is huge. And we have to keep this big history going.'"

Ultimately, Laurène Boss described the Drouhin business model as "co-existing generations." "It's more about transmission and heritage," she stated. "So that's a big thing. I think it's harder for me today because I'm the only one from the fifth generation. There were four of them, so you split the knowledge. Today, I have to learn about every step of the winemaking."

As a Millennial, however, Boss brings some valuable skillsets to the table. "LVMH is a really good school for that because they have years of experience in marketing, communication and teams," she noted. "And we're big—we have 100 people to manage, and it's not that easy to do, especially today. So, I'm bringing a little bit of that new, fresh eye and management and how to tell a story to people. If I'm the only one of the fifth generation, I cannot be everywhere at the same time. We need to structure how we can talk about the family, the vineyards, the wine. And also we have a big challenge, which is climate."

However, the cornerstone of Drouhin's family heritage rests on tasting and savoir-faire. "I think something important at Drouhin is [that] Joseph, Maurice, Robert, Véronique and [now] Laurène—we always have been connected with the wine production," said Boss-Drouhin. "Finding a really good finance director or a manager or a super-good marketing guy, it's easy. But the know-how and the legacy of the winemaking and the study you want to do, that's important."

Since 1988, Véronique Boss-Drouhin routinely ships Oregon wine samples via FedEx to her home base in Beaune for tasting. Laurène participates in the tastings, which typically span about two days. "Since there is always quite a lot to taste, I organize it by 'families'—DDO Pinot, Roserock Pinot, and both Chardonnay from DDO and Roserock together," explained Boss-Drouhin. She added, "Beyond 35 samples per session, our palates are tired and our tasting judgment not so accurate." Afterwards, Boss-Drouhin relays her findings to her assistant winemaker at DDO, Arron Bell, for follow-up.

Robert and Philippe Drouhin sometimes join the inter-generational tastings. "We still sometimes taste all together with my father and my brother Philippe, who runs all farming programs at DDO and Roserock," said



RICHARD DUVAL

Steve Robertson of Delmas

Boss-Drouhin. “Philippe is, of course, always very interested to relate what we find in the wines to what he did or what happened in the vineyards. This is how we built our experience and how we are nailing down nuances between the blocks and, little by little, revealing the best ones of both estates. Sort of similar to what the monks did in Burgundy in the 12th century (except they did not have to Fed-Ex the wines...!)”

In Their DNA

Other Oregon wineries carefully choreograph succession strategies based on models similar to those in Burgundy. “It was always our intention that this would be a legacy project,” stated Steve Robertson of Delmas in the Walla Walla Valley. Robertson and wife Mary planted SRJ Vineyard in The Rocks District of Milton-Freewater in 2007.

Daughter Brooke, now 35, approached her parents about eventually assuming ownership while in her early twenties. “We worked with the lawyer and charted that course in terms of when the best timing would be for that formal financial obligation on her side,” explained Robertson.

He also started including her in service provider meetings, check writing and tax paying. “It makes a whole bunch more sense to wrap every decision around that eventuality from the get-go,” said Robertson. “It’s not a responsibility. It’s actually in her DNA.”

To understand the viticultural aspect of the business, Brooke broadened her technical and educational experience with studies at UC Davis, stints in Napa and Master Pruner Designation training with Simonit & Sirich. Robertson believes his daughter’s educational and technical expertise balances out his business savvy. “Where I can override her is just experience.”



Mary Robertson of Delmas

RICHARD DUVAL

For Robertson, financial realities underpin every decision. “I understand the importance of money and dealing with money,” he noted. “So many people in our industry come at it from the farming side or the science side. The thing that connects those two things is business, but they’re not businesspeople. We want to focus on style; we want to focus on farming practices. But that’s not the most important thing. The most important thing is the business that connects all of that.”

Robertson’s business savvy extends to marketing, too. “I knew early on, just from previous business models and looking at the Old World, that if you’re a small vigneron, you better be good in terms of the quality of your product. And if you, as owner, are also selling the product...you have a different connection with your consumer, which builds loyalty, which is not vintage-related. It’s producer-related. So we’ve always been 80 percent DTC (Direct To Consumer). Always.”

Ultimately, Robertson strives to emulate Old World practices put in place centuries ago. “Again, the Old World model is really super-clear in this respect. There’s an historical model that we can all look at, that gets you through the tough times,” he said. “Because there will be tough times—people are dealing with it right now. But the big goal is always there, and it keeps us focused on the day-to-day. That’s the issue. If you’re not focused on that out there, you’re not going to get there period because of the pandemic or whatever else is going on. It’s the building of the DNA. That’s the Old World lesson.... It’s not complicated. And it changes your decision-making, even in the near term. If you’re focused on something 50 years out, that’s beyond you, that’s not about you.”

Flexibility

Some Oregon family winery succession plans evolve more organically. Pat and Joe Campbell of Elk Cove Vineyards belong to the first wave of pioneers who planted Pinot Noir in Oregon’s Willamette Valley during the late 1960s and early 1970s. As with other “first families,” the Campbells financed their vineyard and winery by working day jobs, sharing equipment and enlisting their children, friends and family as labor. In those days, succession plans simply involved surviving to the next vintage.

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Early picking crew at Elk Cove Vineyards

Over time, the children of this initial generation stepped up to run the family enterprises. Pat and Joe's son, Adam Campbell, assumed winemaking and management at Elk Cove Vineyards from his parents in 1995. Quickly, Campbell realized he needed to get creative to maintain his parents' legacy. "So starting in the mid-90s, we leveraged our good relationships with lenders and borrowed money to embark on a vineyard acquisition development project that increased our vineyard holdings ten-fold," he recalled. "We increased production capacity and invested in our sales and marketing."

Campbell's sister Anna joined him as creative director in 2012. Together, the siblings pushed boundaries further. "We now own and farm 400 acres of estate vineyards for Elk Cove, and we also have founded a sister winery called Pike Road," said Campbell. "We have two thriving tasting rooms, and sell our wines throughout the USA and in 15 export markets. In today's age of consolidation and out-of-state corporate ownership of wineries, we are so proud and happy that we are a family-owned and -run estate winery."

It took time away for Anna Campbell to realize she could add value to the family winery. "After a decade of working in commercial photography, I could finally see my place in the wine industry on the communications and marketing side," she explained. "I think the hard part was finding how I could best support the family business. We hadn't had a creative director previously, and our marketing was wrapped up in our sales department. We're now up to 50 employees; and while we all wear many hats as we grow, the jobs do get more specialized."

"I feel incredibly lucky that I get to work with my family," she added. "I have heaps of respect for what my parents did to help found the Oregon wine

industry, starting a business with my mom's farming background, income from my dad's medical practice, and a passion for wine but not much else. And I have heaps of respect for my brother—his winemaking and skills, his management abilities and his viticulture instincts that have all helped Elk Cove grow year after year. Part of our shared family culture is that we enjoy working hard, and we enjoy working together—I think if we didn't have that work ethic and respect for each other, it wouldn't work."

"Anna brought so much to the table when she decided to come home to the family business," agreed Adam Campbell. "Anna is very creative, and she is an innovator when it comes to how we are able to tell our story as a pioneer Oregon estate winery with a focus on farming."

Clearly, unwavering generational support anchors Elk Cove's succession success. "My parents have always been supportive of my



ELKCOVEVINEYARDS

Mt Richmond Vineyard Spring 2019

plans for growth and success," said Adam Campbell. "We own the business together, and I appreciate how much faith they had in my vision—always willing to support growth even when it meant big loans from our lenders. In the early days of the transition, we had some tough conversations; and while I am sure they were nervous, they were always willing to bet on me, and we took that leap of faith together."

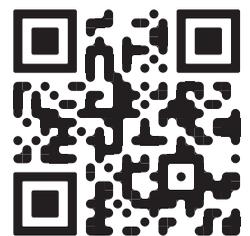
But Anna Campbell also cites flexibility as key to the winery's survival. "Honestly, this is one of the things I love about working for a family business—we are very family-focused—and being relatively small allows us to be flexible and dynamic," she noted. "Wine is, of course, a very traditional business, but we've had to adapt to new technologies, new trends in American wine consumption, and certainly, in the past two years, we've had to adapt in how we get our bottles in front of wine lovers during a pandemic. The fact that Adam has been able to have staff stay on for an average of 10 years each has really helped us stay dynamic—we have a highly skilled and creative team. You can't be in this business unless you love it, but Adam understands that



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Pat and Adam Campbell of Elk Cove Vineyards

employees are also nurturing their own families, and their own aspirations and career trajectories.”

What about the third generation? “When I think of the third generation’s involvement in Elk Cove, I do worry a bit about this pattern of young people flying the coop,” admitted Anna Campbell. “My brother and I really grew up at the winery in a way this third generation did not. I remember when I was 11, I could finally lift a case of wine, and so my parents put me to work on the bottling line. We really were our parents’ first source of labor. As a result, Elk Cove, more than any house, is the place I’ve always thought of as home. Even when I lived far away, that was true. The third generation doesn’t have that experience (we now have adults bottle our wine!), and I’m sure some of them will have careers and loves and homes that take them other exciting places.”

“Both Anna and I feel that while we would love to have the next generation involved, it is really critical that they find their own way home, and that would probably include formal training and relevant work experience outside of Elk Cove,” concluded Adam Campbell. “Lucky for us, they are all smart kids, and they will have many options for success in life...and if their passion leads them to Elk Cove, so much the better!”

Freedom

Sometimes, maintaining a legacy involves letting go. In 2021, Champagne Bollinger purchased Ponzi Vineyards in the Willamette Valley. Founded in 1829, it marks Bollinger’s first purchase outside of France, which includes holdings in the Loire Valley, Burgundy and Cognac.

Bollinger’s acquisition included Ponzi’s 40,000-case winery and hospitality facilities, along with three vineyards, totaling 35 acres. These vineyards, all located within the Laurelwood District AVA, include Avellana, Abetina and Madrona. Conversely, the Ponzi family retained 100 acres of grapes, plus a long-term contract to sell them to Bollinger for use in the Ponzi Vineyards’ brand.

Lauded as pivotal players in Oregon’s premium Pinot Noir scene, Dick and Nancy Ponzi founded Ponzi Vineyards in 1970. Daughters Anna Maria and Luisa Ponzi assumed management of the winery in 2012. “We come from a background of two people who really believe in following their dream

and their spirit and their drive,” said Anna Maria Ponzi, past President and Director of Sales and Marketing. “Likewise, in my world, I didn’t have a mother who was saying, ‘That’s not how we do marketing.’ Quite the opposite. They were sort of like, ‘You guys go and take it and see what happens.’ So I think that makes our story perhaps a little bit different. They would never ‘be there’: it was always us going to them. There’s a big difference there. And I think that what happens is you want to keep going back and asking and checking in. If they’re riding on your shoulders, all you want to do is get them off your back.”

This same easy, gentle touch helped smooth Luisa Ponzi’s transition to head winemaker from her father in 1993, a job she retains post-Bollinger purchase. “My father was very generous,” explained Luisa Ponzi, “and supportive. I think there’s something special between the daughter and father transition, which may lack sometimes in the son-father in that he really just wanted me to succeed. But my father...I think he would say he’s not a winemaker at heart. He’s kind of a renaissance man. He likes to start things and figure out how to make them work, and then he’s ready to move on. And so, I think, he was very willing to give me the reins pretty quickly after he felt like I knew what I was doing. I came back from Burgundy in ‘93, and by ‘96, he was off on vacation during harvest. It wasn’t a long transition. He was ready to move onto his next project. He’s a guy that likes to dream big and then see if he can make it happen, and then he’s ready to go to the next thing. And so, when I came on, he was ready to pass it over. And it was fun. Really fun.”

Ironically, this unfettered freedom informed the winery sale. A combination of 50 years of backbreaking work and COVID finally took its toll. Anna Maria and Luisa Ponzi realized they weren’t having fun anymore. The sisters considered various options, with their parents’ blessing, ultimately choosing to sell to an outsider. “Our folks allowed us to have this amazing freedom. And still with a sale, you know, they were very supportive of it. They’re guiding, they’re asking the right questions, and they never told us which way to go, ever. So it’s very refreshing. It sounds a little cutesy and prettied up, but it’s really the reality of it.”

As new owners, Bollinger envisions no major changes at Ponzi Vineyard, save a greater focus on quality rather than quantity. They also bring a respect for terroir, and a robust international marketing and sales division. For Maria Ponzi, Bollinger’s resources allow a wider audience to amplify her family’s story. “I think that it’s very important for the American culture that we keep some kind of normalcy around wine because I find it to be an amazing part of life, but it’s not going to be for everybody if we keep it at this elitist kind of level,” she said. “And I feel that there is so much to tell about this particular region that I’m so proud of, and I feel like more people need to really get it. And when they get it, they fall in love with everything all over again, right? They fall in love with the product but also the place and our ethics and everything that we’re doing here: the values that we have.”

For Oregon family winery stalwarts who want to keep their legacy intact, Maria Ponzi offers some final advice: “With the family dynamic in particular, I think it’s very important that you’re very true with who you are. And that you can work with people—your siblings, or your aunts or uncles, whomever they are—make sure that there’s great synergy, and it’s positive. Otherwise, man, it can be a rough place to live in.”

Climate Change

Regardless of any succession plan, climate change looms large as an unknown variable. “I mean, the mega shift is climate change that we’re all figuring out,” Robertson confessed. Currently, Brooke Robertson has shifted her family’s vineyard to MHT (Mini-Head Training). MHT involves keeping vines low to

the ground for easy cane burial, during winter, to prevent frost damage and plunging temperatures. Additionally, the lower vines benefit from their proximity to the region's cobbled soils that absorb heat, during the day, to protect them from nighttime diurnal temperature shifts. "As winegrape growers, we are on the cusp of some very large climactic and political realities that we have only seen the beginnings of so far," she observed. "Water availability, labor availability, varietal selection and much greater things out of our control, like the very real threat of fires, and extreme heat and cold on either side of the growing season...to say it is challenging is a gross understatement."

However, Brooke Robertson also envisions generational changes in vineyard and winery operations over the next 20 to 100 years. "We are open to rolling with the punches," Brooke stated. "And if it turns out that the MHT is not working anymore to secure vines as they age, we will change it and create something else that makes more sense, depending on what we face climactically in the future."

Other wineries adapt through clonal selection. "Luisa, of course, wanted to experiment with clonal selection, and so we created the clonal massale, and that has been extremely interesting," noted Maria Ponzi. "And I think that is something that we're going to see a whole lot more of in the next couple of decades, frankly, with global warming and all that's going on. I think that's one of those innovations that she really came up with herself. People were saying, 'What are you doing? You would never mix up to 22 clones in an acre: that's nuts!' So I think innovation, experimentation, taking risks is something that has kind of been a common kind of track for us."

Bollinger intends to continue this trend towards innovation. Recently, Luisa Ponzi visited Bollinger's headquarters in France to meet with the rest of the oenology team. Among the topics discussed were proactive viticultural practices to address climate change, with an emphasis on organic and Biodynamic farming.

As a Millennial, Laurène Boss brings a practical urgency to the topic that extends beyond the vineyard. "My thought on climate change is quite simple," she said. "I think today the question is not 'should we do something?' but 'what should we do today and tomorrow at DDO and MJD to reduce our impact and so protect the planet, humans and animals?'"

Longtime stewards of the environment, the Drouhin family first initiated organic and Biodynamic farming practices back in 1988. In 2008, they reduced bottle weight, one of the wine industry's biggest contributors to carbon emissions. The family also planted fruit trees and maintains native forests at Domaine Drouhin Oregon. In Burgundy, they cultivate ongoing plantations, with native fruit and trees in Clos des Mouches, and flowers and trees around the MJD winery.

But Boss acknowledges the importance of ongoing analysis in order to remain ahead of the curve. "We are working on the strategy before taking proactive steps," she stated. "But the idea is to first realize a carbon footprint diagnosis then identify where we can improve and finally define the goals to have a clear path for the next years to come to lower our carbon footprint 'from the vines to the glass.'" **WBM**



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