

Purple Gold

Niche Grape Growing Networks in Orange

Matthew Arrowsmith

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School of Geosciences
University of Sydney

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Glossary

Appellation	wine region of origin
a.s.l.	above sea level
ASX	Australian Stock Exchange
ABARE	Australian Bureau of Agriculture and Resource Economics
ANT	Actor Network Theory
ANZWIJ	Australian and New Zealand Wine Industry Journal
AOC	Appellation d'origine controllee
AWBC	Australian Wine and Brandy Corporation
Baume	Grape sugar content
BSE	Bovine Spongiform Encephalopathy
Cabernet Sauvignon	Wine grape variety
CAP	Common Agricultural Policy
Chardonnay	Wine grape variety
C.O.M.E.	Cowra, Orange and Mudgee food and drink Experience
CRCV	Cooperative Research Centre for Viticulture
DSRD	Department of State and Regional Development
EU	European Union
GIC	Geographical Indications Committee
Merlot	Wine grape variety
Muscat Hamburg	Wine grape variety
MW	Master of Wine
NCC	National Competition Council
NFF	National Farming Federation
NSW	New South Wales
OCC	Orange City Council
Oenologist	Winemaker
PDO	Protected Designation of Origin
Pinot Noir	Wine grape variety
PPT	Post Productivist Transition
QA	Quality Assurance
RIRDC	Rural Industries and Research Development Corporation
Sauvignon Blanc	Wine grape variety
Semillon	Wine grape variety
SFDP	Specialty Food and Drink Product

Shiraz	Wine grape variety
TNC	Transnational corporation
vCJD	Creutzfeldt-Jakob Disease
Vigneron	Grape grower
Vinification	Winemaking
Vintner	Winemaker
Viticulturist	Grape grower
Viticulture	Grape growing
WFA	Winemakers Federation of Australia
Zinfandel	Wine grape variety

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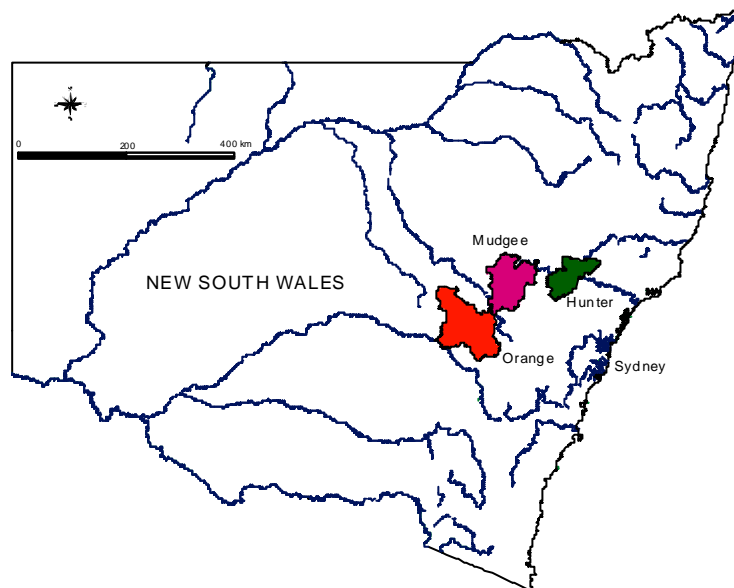
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1. Australian agriculture at a cross-roads: the growth of small-scale niche farming enterprises in Orange

This thesis examines the burgeoning growth in numbers of small farms in Australia specialising in niche production, the promotion of environmental amenities, and farm-related service activities, such as farm tourism. Grape growing and winemaking has been a central element of these growth trends, anecdotally reflected in the notion of the ‘march of grapes across rural Australia’. Here, I seek to chart a contemporary economic and cultural geography of small-scale, specialised Australian farming through a focus on the boutique grape growing and wine industry in the geographical region of Orange, New South Wales (NSW) (see Map 1.1).

Map 1.1 The geographical wine region of Orange in the Central West Zone of New South Wales. Also shown are the proximate wine regions of Mudgee and the Upper Hunter Valley.

Source: ABS, 1996.



In Australia, there have always been small farms and small-scale farmers, some of which farm a variety of produce. In this thesis, however, it is proposed that the current incidence and growth of small-scale farming provides a signifier of deep changes within the social construction of the Australian countryside. Producers are looking to lessen reliance on diminishing and residual markets for bulk agricultural commodities, and are moving towards the supply of value added products, desired increasingly by niche consumption spaces both domestically and overseas. This is consistent with Holmes’ (1997: 3) opinion that Australia’s rural lands are undergoing:

“a major re-evaluation, with agriculture’s former dominance being selectively displaced by diverse values and uses”.

Aside from its value in exploring the tangents of current Australian farm restructuring processes, this investigation of the growth of niche farm production is useful for thinking how the restructuring of modern agriculture is progressively underscored by a range of socially inscribed discourses, especially around consumption. Strong reactions against mass-produced food, supposedly devoid of tradition and identity (Bessiere, 1998) and the increasing desire of consumers to be able to trace food products to their origins, have encouraged the development of specialty food and drink products. These consumer discourses are evidenced at the farm level by the growth of non-traditional crop production (organic produce, for example) and of specialty agri-food industries such as boutique grape growing and handcraft winemaking. Marsden (1997) views these trends in terms of *relocalisation*, a process in which increasingly distinctive, often locally-produced food and drink products and increased consumer knowledge, become more important in the agri-food economy. Moreover, the gearing of production to niche agri-food discourses, such as consumption trends, is an important instrument for the profitability of individual farmers.

Set within these contexts, this thesis deploys the empirical case of the rapid growth in small-scale grape growing and winemaking in the geographical area of Orange to explore the nature of rural social and economic change in Australia. Using primary evidence from a survey of boutique viticulturists and winemakers, it is demonstrated that smallholders' engagement with farming can be conceptualised as part of a process of producing (small parcels) of space for specific forms of value-added, rural commodity production. Inherent is the process whereby farmers are packaging particular parts of the countryside according to socially constructed values and ideas of quality food and drink production.

Chapter outline for this thesis

This section proceeds to chart how the collection of ideas outlined above will be elaborated through the course of this thesis. In chapter two, the geographical spread of new, diverse, lucrative production arrangements at regional settings is shown to lie at the intersection of two important sets of changes in Australia's rural areas. The first involves economic restructuring in the Australian farm sector. For many, farming is in crisis as a result of low prices, reduced political support and intensifying global market forces. In this environment, segments of farmers are experimenting with a wide range of new enterprises in an endeavour to find profitable alternative uses for their land.

The second, arguably underpinning the first, is a wider set of processes associated with what has been termed the 'post-productivist transition' or PPT (e.g. Marsden, 1998). The concept of the PPT rests on the argument that two main phases of change can be identified in the post-war restructuring of agriculture. The productivist phase, where the emphasis was placed on raising farm output, broadly spanned those years from the early 1950s to the mid 1980s, and was characterised by a continuous modernisation and industrialisation of agriculture. The post-productivist phase is said to symbolise a shift in agrarian priorities in developed market economies, notably a reduced emphasis on

quantitative food output and a greater emphasis on quality niche production, as well as meeting broader rural development and environmental objectives. This shift in rural objectives relates primarily to western Europe. The current chapter attempts to gauge the complex processes of economic, social and environmental change which Australia's rural lands are undergoing and, thereby, assess the plausibility of their interpretation in line with the concept of an 'Antipodean PPT'. Drawing attention to similarities and differences in rural processes of change in western Europe and Australia has the effect of emphasising the variety of rural trends and identities that are forcing deep changes within the social construction of the Australian countryside.

In chapters three and four, the idea of these two sets of changes is analysed by recourse to one of contemporary agriculture's most discernible facets of change: the incidence and growth of small farms specialising in lucrative, niche production. The empirically derived example of the growth of boutique viticultural and winemaking enterprises in the district of Orange is examined to deduce how agricultural spaces in regional settings are being redefined in sequence with these twin processes.

The empirical choice of Orange is guided by the burgeoning incidence of small-scale 'sunrise' production ventures in its vicinity in recent years:

"The rapid growth of non-traditional crop production in the Central West Zone, such as woodland farming, Asian vegetables, and wine grapes and wine, suggests a fast-growing sector of producers that are accepting the challenge to diversify and capture the unprecedented commercial possibilities the evolving Australian and foreign food and wine palate offers" (Dennis, 2000).

The most strident of new small-scale enterprises is viticulture and winemaking. From initial plantings made by pioneer growers in 1983, Orange has since grown to encompass sixty-six wine grape growers, fifty of which grow less than ten hectares. The majority of these small-scale farmers grow boutique grapes and market niche, value-added wine products. These empirical facts, allied with the recognition that wine is honoured as the premise by which rural areas throughout Australia are revitalising their economies, specify Orange's boutique grape and wine industry as an appropriate model by which to explore wider changes in the social construction of the countryside

The exercise of comprehending why producers are diversifying into high-value crops like grapes and self-marketing the processed product involved the researcher conducting interviews with thirty-one boutique grape growers in the Orange district, fifteen of which own handicraft wine companies. The survey of producers formed the most important element of the research. It established data on Orange's boutique wine industry on a number of fronts: not only size, but diversity and quality too. The chosen interview-survey method was premised on a similar format to that advanced by Pritchard and Arrowsmith (2000) in their study of grower-winery relations in the Murrumbidgee Irrigation Area, NSW.

Using results from the researcher's fieldwork survey, chapter three charts the place and growth of small-scale specialist farming – in the form of grape growing and winemaking – in the Orange region. The survey, firstly, examines the differential responses made by farm households at the point of production to new conditions in the farm sector. Results suggest that the uptake of boutique grape growing symbolise a segment of entrepreneurial farmers seeking to capture the new commercial opportunities presented by the evolving Australian and foreign wine palate. In this context, the long-running farm cost/price squeeze and the farm adjustment process become but two factors (albeit very important ones) among many affecting Orange's producers. Survey results proceed to, secondly, show how Orange's grape and wine producers can be conceptualised in terms of ideas from both studies of farming culture and the nature of social change in the apparently post-productivist countryside. Questions of small-scale farming identity and lifestyle, and the meanings attached to vineyards and winemaking activities are clearly important. At the end of chapter three, it is held that micro-scale, niche production in Orange is actively and discursively produced by those people involved and as such constitutes something greater than the unquestionable upshot of broader economic shifts arching through Australian farming.

In chapter four, it is demonstrated that boutique growers and winemakers are forging new commercial prospects precisely through recourse to contemporary agri-food values and discourses emphasising quality. The thrust of the geographical problem here concerns how Orange's grape and wine producers are utilising selective discourses of 'quality' to construct a setting which explains the production fortunes of the local industry. To demonstrate, weighted average grape prices for all premium white and red grape varieties grown in the Orange wine region are consistently higher than other NSW wine regions (NSW Wine Industry Association, 2000). A key problematic then is how to define quality and the way in which it acts to bind together a number of social agents across space, from the purchasing consumer to the grape grower and a plethora of mediating industry, policy and community actors. This chapter critically examines the relational nature of quality, identifying it as an assemblage of mutual supportive discourses. Comprehending how quality is constructed by a variety of agents across the spectrum of the boutique industry is facilitated by the deployment of Actor Network Theory (ANT). An ANT approach focuses on the subjective discourses that serve to order groupings of social actors across space, by explaining them as 'modes of ordering'. For the current study, then, a subjective mode of ordering of quality is highlighted as being paramount to the engagement and involvement of a variety of 'actors' within a boutique wine 'network', spanning social parties in the arenas of production, trade and consumption. In chorus, Lockie and Kitto (2000) conjecture that the task for a progressive agri-food studies is not to locate the locus of control, be it an agent, institution or process, within agri-food commodity chains. Rather, the focus of inquiry and potential generalisation should be the social relationships through which these are constituted.

The 'how' part aside, it is important to restate 'why' these discourses or relationships are of analytical significance. In an ever more competitive global food and drink environment, specialist discourses, ('quality', but 'organic' and 'green and clean' also),

are being used by Australian producers as a valuable tool to differentiate products and, thereby effect new financial goals. Importantly, the concept of a 'mode of ordering' implies that relationships of control and value-adding in agri-food production are increasingly less one-way as producers are able to bid to alter the terms in which they are represented and enrolled in food and drink commodity chains by recourse to Western food and drink discourses that are 'new' and 'now' and, importantly, favour small, specialist producers.

The restyling of food and drink relationships, therefore, is shown as advancing the empowerment of hitherto overlooked and marginalised social voices, namely small-scale producers. Consumption practices are another such example – normally presented in modernist accounts as the unquestionably simple outcome of activities associated with the provision of food and drink products, the current approach identifies their usefulness in linking those activities. This challenges the prevalent conception in agro-food studies where control and value-adding in food and drink chains is vested exclusively with pre- and post-farm gate agents, or input-oriented agribusiness and near-consumer agents like retailers, respectively. An actor-network framework thus obstructs a sole focus of study on the emergence of modes of connection that privilege food-processors and retailers as 'centres of calculation', and the way in which they unproblematically control the situation in which food and drink is consumed both materially and symbolically¹.

In chapter five, survey findings pinpoint profitability in farming to be increasingly dependent on the processing and marketing of value-added products rather than on production alone. For most wine enterprises, small and large, there is a tendency to live by production and possibly distribution with little attention paid to marketing or other value-added processes (Lockshin, 1999). In the instance of the small-scale producers of Orange, however, the primary involvement by winemakers in all stages of marketing is reported, whether that be the personalised social practice of forging export connections or the construction of labelling and branding strategies by winemakers themselves, again according to a range of social and geographical discourses. The perceived value of marketing in constructing greater prosperity is causing producers to network, in the traditional sense of the word, with an expanding plethora of social agents, situated in the production, regulatory and consumption arenas. These networks are presented as evolving in two geographical settings: local arenas and extra-regional and export arenas. The methodological task presented in chapter five therefore is to trace the formation, development and content of producers' marketing and branding networks. This requires assessing how they expect to prise open new market spaces and lead to positive economic growth trajectories for individual farmers, and identifying how constraints can serve to restrict their development.

¹ This is not to deny the general hegemony of post-farm actors in the construction of value-added elements. Indeed, in the case of the UK, multiple chain retailers have been at the fore in projecting positive representations of food quality and authenticity (often through quality assurance schemes), with small-scale producers and retailers finding it difficult to compete (Ilbery and Kneafsey, 2000).

Finally, chapter six summarises this thesis by evaluating the usefulness of both the concept of the PPT and the theoretical approach of ANT in terms of their comprehension of the growth of small-scale niche farming in the region of Orange and Australia more generally. The thesis concludes by stating that our understanding of processes of social, environmental and economic change in contemporary Australian agriculture is not complete without thinking about cultural constructions of farming as an activity, of farmers themselves and the places in which farming occurs.

2. From ‘riding on the sheep’s back’ to viticulture, floriculture and aquaculture: the emergence of the post productivist transition in rural and regional Australia

This chapter explores the proposal raised in the opening chapter that the incidence and growth of small-scale farming provides a signifier of deep changes within the social construction of the Australian countryside. The spatial spread of small-scale, sunrise farming industries is shown to be representative of two important sets of changes in the social construction of Australia’s rural areas: first, agricultural restructuring; and second, a wider set of processes associated with what has been termed the post-productivist transition. This involves a redefinition of rural spaces from mere zones of economic production to a series of spaces of production and consumption, where cultural practices and choices become tantamount to the formation and thereby understanding of new farming patterns.

In western Europe, the PPT is considered to be over a decade old (Lowe, 1997). This chapter, by drawing on the notion of an ‘Antipodean PPT’, critiques the established characteristics of the PPT by exposing two essential differences between its European and Australian forms. These relate to differences in their evolution, for their surface manifestations are relatively agreeable. Firstly, there are the differing degrees with which the central states in both political entities are committed to market reform. On the one hand, then, the lowering of protectionist barriers by the Australian federal state will be shown as promoting the growth of niche production industries by enabling producers to seize precise market niches, rather than simply aiming at import replacement. In western Europe, on the other hand, the EU central state is argued to be promoting the development of small-scale, alternative production through highly regulated, policy led agri-environmental programmes. The second distinction between ‘new’ agricultural trends in Australia and its European counterpart is argued to be the variation with which farming is historically embedded within the two societies. The present advanced degree of consumer orientation by Australian producers is conjectured as extending a historical tradition of providing for overseas consumers. This contrasts with Europe where the supply of niche food and drink products more often represents the revalorisation of culinary heritage resources in an area.

2.1 The concept of the post-productivist transition

There are a number of characteristics of the PPT. These have been developed almost exclusively in association with documented shifts in EU agriculture. According to Morris and Evans (1999), by the middle of the 1980s, the prevailing productivist ethos based on increasing farm output was challenged by a political crisis consisting of budgetary, production and environmental problems. An important element deriving from these policy shifts was the engagement of researchers with the concept of the post-productivist transition, which seeks to capture this shift of farming activity and related policy in the countryside. Morris and Evans (1999) argue that the PPT should be a key focus for geographers engaged in agricultural research. They conjecture that geographical

scholarship on the PPT comprises three chronological components. Again, these are developed in line with the peculiarities of the western European experience.

First, post-productivism was deployed to summarise aspects of agricultural adjustment that had hitherto and variously been conceptualised as ‘survival and accumulation strategies’, ‘elements of farm adjustment’ and ‘farm business development paths’ (see Marsden, 1988; Munton, 1990; Bowler 1992 respectively). It formed a tactic for combining the varied responses of farmers made at the point of production in response to changing conditions in the farm sector.

Secondly, geographical scholarship has attempted to establish the characteristics of the PPT. Ilbery (1998) outlines various dynamics of the PPT: a reduced emphasis on quantitative output and a greater emphasis on quality of food; the production of food within an increasingly competitive international market (Whatmore, 1994); the growing environmental regulation of agriculture; the progressive withdrawal of state subsidies; counter-urbanisation and the opening up of new social-spaces in rural areas, including rural-urban migrants (Halfacree, 1997). Other work has recognised additional elements like the growth of alternative farm enterprises, conceptualised as ‘pluriactivity’ (Evans and Ilbery, 1993), and state efforts to encourage a return to more traditional, sustainable farming systems through agri-environmental policy.

Thirdly, the PPT has most recently become the subject of process-oriented theorisation. Ilbery and Bowler (1998) view the PPT with relation to the EU as a simple reversal of three, previous productivist components of change, which emphasises extensification rather than intensification, dispersion rather than concentration and diversification rather than specialisation. Thus, the shift to extensification corresponds to the period since the mid-1980s when a raft of CAP policies were introduced to encourage farmers to extensify production from originally farm intensive businesses by decreasing their levels of purchased non-farm inputs. There are important implications for the restoration of natural habitats, especially in the grass-based livestock and cereal sectors. Second is the process of concentration in agriculture whereby most output becomes confined to fewer and larger farm businesses and regions. This is considered a response to economic pressures to expand farm size and output in the face of deteriorating terms of trade. However, the advent of revised agri-environmental policies under the EU throughout the 1990s may reverse this trend. Farmers may be encouraged to subdivide their farm businesses into smaller units, thus dispersing agricultural production. However, there is little current evidence of this, and dispersion is the least likely dimension of change to occur. Thirdly, forced by the cost-price squeeze on traditional farm products, together with revised measures under the CAP, agriculturists have implemented a number of coping strategies in the wake of declining farm incomes. Businesses are engaging in different types of agricultural (on-farm) and non-agricultural (on or off farm) diversification. Connected here is the move away from farming systems where a large proportion of total output is accounted for by one particular product, or what is known as monocultural farming. Such diversification trends enable more diversified land-use systems to be created, with associated implications for the environment and landscape.

2.2 An Antipodean PPT

It is less clear to what extent these characteristics of the PPT have emerged in the Australian countryside. This section attempts to model the distinctive experiences of Australia's rural areas over a comparable time frame, and call it an Antipodean PPT. A primary objective here is to draw attention to cross-national similarities and differences in post-productivism, drawing examples from western Europe. These serve to emphasise the variety and uniqueness of Australian rural trends and identities. The idea of an Antipodean PPT is conceptualised in terms of three broad dimensions: producers' new commercial rationales; new food and drink markets; and environmental and ecological values.

It is important to note here that productivist farm systems are not being replaced *in toto* by post-productivist farming systems. This is particularly the case in Australia where, nationally, intensive, high input-high output farming, with an emphasis on food quantity, is still mainstay. However, these systems are likely to become more spatially differentiated, at national and regional scales, as industry, regulatory and consumption patterns interact varyingly to effect different outcomes. Thus, in accordance with discourses of new farming enterprise, consumption, and environmental regulation, productive spaces in 'the bush' are shown here as being redefined, at a tangibly regional scale, in line with the concept of a PPT.

2.3 Producers' new commercial rationales

Rural areas in Australia – as elsewhere in developed market economies – are diversifying increasingly their physical and human resource base. The term pluriactivity has emerged to describe the broadening of economic activity among farm operators, both on- and off-farm. These two elements of pluriactivity were originally examined in isolation, where on-farm diversification was classified into two further categories (Ilbery, 1991). The first category was agricultural diversification. This embraces unconventional crop and livestock enterprises, viticulture, aquaculture, woodland and organic farming, and a vast array of others. The second category was structural diversification. This includes farm-based tourism, adding value through direct marketing and/ or processing, and craft/ light industries.

It appears that the greatest proportion of pluriactivity in Australia is off-farm. This accords with employment opportunities available in local rural labour markets, many of which suffer severe unemployment (Gray and Lawrence, 2000). ABARE survey findings infer that 30% of total income of Australian broadacre farm families was derived from sources off the farm in 1994-95, with about one in three spouses of farmers having off-farm employment (Garnaut, 1998, cited in Gray and Lawrence, 2000). Pluriactivity also has a sharp spatial pattern. Farmers marginalised outside productivist, technology intensive enclaves, according to Jones (1995), report a higher incidence of pluriactivity.

Arable production is concentrated in the most productive areas. Elsewhere, grazing enterprises such as milk, beef or sheep, form the majority of farming, with a proportional decline in the workforce and a growth in pluriactivity.

There appear two key forms of on-farm diversification in Australia. First, farm tourism. Gray and Lawrence (2000) note that farm tourism is another strand of pluriactivity but one that, like off-farm employment, offers more advanced opportunities to certain farming communities, notably those in proximity to natural attractions, such as national parks. Those places with local cultural traditions, such as wine regions, provide strong grounds for value-added economic opportunities. Wine tourism, for instance, is often an imperative for the survival of smaller wineries as an instant market for wine sales as well as a supplementary income for many small viticulturists finding it a challenge living off primary activities alone.

The incidence of alternative crops and livestock is another important form of on-farm diversification. Ricardo's (1817) theory of comparative advantage provides a simplistic yet useful explanation for the opening up of new Australian production opportunities. It proffers that a country's comparative advantages lie in commodities that most intensively use the resources in which the country is relatively well endowed. Australia's abundant natural advantages dictate that agriculturists are in a position to shape a variety of new investment and production decisions. Inland aquaculture, for instance, has been marked for large growth potential because of Australia's conducive weather conditions, existing resources and infrastructure, and large domestic demand. Australia's suitable endemic and locally available exotic species has underpinned the boom in wildflower production, which has an estimated farm-gate value of \$45 million (Evans, 2000). The key commercial wildflowers are Geraldton wax, kangaroo paw, and species of *Banksia* and *Protea*. Comparative advantages in this domain translated to \$30 million in value of exports of wildflowers and native plant. The Australian deer industry has an estimated value of production of around \$5 million at the farm gate (Core, 2000). The majority of the herd is in New South Wales and Victoria. Its viability is premised on Australia's advantages in animal husbandry knowledge, a large domestic market, and the consolidation of niche export markets in Japan and Korea.

The picture is more complex than producers' ability to capture greater comparative advantage in some markets. In the realm of production, diversification of the agricultural sector represents the intersection of intensifying global market forces and regulatory influences. Firstly, Australian farmers have been facing substantial economic pressures to increase efficiency and productivity in line with declining terms of trade for traditional, bulk agricultural commodities. Significant sections of the farming and grazing industries are no longer commercially viable. Robertson (1997) reports that 80% of broadacre agriculture was unprofitable during the 1990s. A related consideration here is the rising impoverishment of segments of rural producers. The average total income of broadacre and dairy farms, for example, was approximately \$27,300 in 1994-5, while that of the average household in Australia was \$38,700 at about this time (Garnaut & Lim-Applegate, 1998:2, cited in Gray and Lawrence, 2000).

The crisis in agriculture has been more pronounced in certain segments of farming industries. High input-high output farming has continued to expand alongside those marginalised sections. Beef feedlotting is one such growth industry. Exports of grain-fed beef, chiefly for Japanese consumption, rose from 5000 tonnes in 1988 to 34,000 tonnes in 1990 (Le Heron, 1993). By the mid-90s it was estimated that 25-30% of all cattle slaughtered in Australia were turned out of feedlots (ibid.). The Riverina area in New South Wales had four new complexes installed from 1990-2, for example. This induced a shift from small-scale private beef farming to feedlot complexes holding 130,000 head and passing through 250,000 animals a year.

Secondly and in addition to the farm cost-price squeeze, which is a long-running aspect of agricultural restructuring world-over, the Australian experience has been intensified by broad-scale deregulation. The 1999 budget of the current federal government articulated that it could best contribute to the fortunes of regional and rural areas through a prosperous national economy and associated labour market outcomes (in Beer, 2000). This continues a vein in federal government rural policy that draws heavily on neoliberal economic strategy. Neoliberalism is an ideology that places economic objectives above social justice. The marginalisation of certain farmers is a byproduct of this ideology (Higgins, 1998).

This issue highlights the particularly parlous nature of restructuring in Australia's rural economy. The economic fortunes of Australian farmers, who comprise one of the most economically competitive producer sectors in the world, hinge inextricably on the operation of accessible export markets (Pritchard, 2000). These in turn are dependent on the advocacy of bilateral and multilateral trade liberalisation agreements on an increasingly global scale. This presents a double quandary for Australian producers:

“For Australia to argue for trade liberalisation elsewhere in the world it has had to implement a programme of trade reform internally. Australian farmers are expected to be competitive without a reliance on government support. This manifests trade liberalisation as a two-edged sword, with attendant controversy” (Pritchard, 2000: 91).

On the one hand, then, there has been widespread support for Australian government attempts to forge new openings in overseas markets and reform of global assistance to competing farmers, most notably those in EU countries. This is a strategy espoused by the ex-President of the National Farmers' Federation, Donald McGauchie:

“[There is a] need to clear the decks in relation to international trade and farm policy distortions, because, given the right signals, farmers can get on with job of adapting to changing circumstances themselves” (McGauchie, 1997: 3)

On the other hand, local tariff reductions and the dismantling of statutory marketing arrangements has proved highly contentious (Pritchard, 2000). Australian federal government has vigorously dismantled trade barriers and, while some remain, few agricultural sectors would be effectively protected by the remaining low tariffs (Beer, 2000). The downsizing of statutory marketing structures has presented considerable

impediments to expansion by new industries, too. For instance, Australia's freshwater crayfish industry is forecast to undergo significant expansion – primarily through farmers seeking to diversify their businesses by growing yabbies in water traditionally used solely for livestock (Piper, 2000). However, there is a need to overcome a perceived lack of understanding of rural based aquaculture by governments and local authorities. The withdrawal of government assistance in areas such as industry co-ordination, marketing and research and promotion is marred investment and export opportunities for a number of such incipient industries (ibid., 2000).

A number of specific analytical devices have been deployed in political economy to understand the emergence of agro-food patterns such as niche production. This includes devices like 'global commodity systems' (Friedland et al. 1991), 'systems of provision' (Fine et al. 1996) and 'agro-food regimes' (Le Heron, 1993). It is premised that new farming rationales form a knee-jerk response to increased exposure to market forces as neoliberal capitalism intensifies the competitive environment facing farmers and as federal agricultural support is progressively downsized.

Take the example of food regime theory. Agro-food regimes "are found in the characteristics of large-scale food production and consumption and relation to the state system" (McMichael, 1992: 344, cited in Pritchard, 1996). The food regime account discerns three particular agri-food systems over the past century. Recent scholarship is aimed at tracing those regimes of agri-food accumulation and modes of regulation progressively managed at a global scale. Advocates of this theory agree that the second food regime has been waning for over a decade now (Pritchard, 1996). The production environment that came to be associated with the second food regime fractured in response to the combination of institutionalised over-production (most notably so in the EU) and the desires of government to recoil state support for agriculture (ibid.). For farmers, the influence of these changes was intensified by their dependence on fluctuating world food prices and ready access to affordable credit. The debt trap, and growing impoverishment of producers vis-à-vis other agents in the food commodity chain has become a primary means by which agricultural sectors are restructured (Mooney, 1986, cited in Pritchard, 1996). New farming schedules, therefore, comprise a scenario where farmers merely seek to offset the losses wrought by the collapse of accumulation strategies under the second food regime, or what is labelled Fordism.

Political economy analyses advance our understanding of the occurrence and growth of niche production patterns by demonstrating how contemporary, extra-local market and regulatory forces have a powerful capacity to undermine the socio-economic bases of rural and regional communities. Meaningful to the Australian experience is the increased market exposure wrought by the current deregulated landscape. The transition of a proportion of Australian farmers from traditional bulk commodity suppliers has been accelerated by extensive market reform within and outside Australia. This is permitting the transmission of increasingly clearer market signals to producers and their farming practices. This enables them to experiment with a wide range of new enterprises in an endeavour to find profitable alternative uses for their land.

2.3.1 Post-productivist agri'culture's?

So far in this section, producers' new commercial rationales have been explained as the exclusive product of capital accumulation strategies and regulation modes. There is little scope for exploration of the social and cultural contexts in which modern farming is evolving, at local or other scales, or how the farmer is actively seeking to mould new economic opportunities.

Whatmore and Thorne (1997: 288) attest the limited insight of political economy in the study area of economic globalisation:

“TNCs and associated regulatory bureaucracies become magnified into institutional dinosaurs whose scale and mass overwhelms the paltry significance of the ir social fabric, at the same time as the life practices and milieux of lesser social agents are dwarfed and overshadowed in this colossal landscape”.

A serious consequence, therefore, of political economy approaches is its tendency for elimination of social agency and struggle from methods of analysis. New agro-food geographies are presented as a systemic and logical, rather than a partial and contested, process (Amin and Thrift, cited in Whatmore and Thorne, 1997). Post-structuralist sociological theories such as Actor Network Theory (ANT), on the other hand, problematise geographical reach by conceiving of it as a laboured, uncertain, and above all, contested social process. The point is that the spatial scope of such processes and patterns of connection is not reducible to a determinant interest lying beyond the social fabric. The failure of social and thereby geographical imagination in political economy accounts marks the difference between systems and networks.

In this sub-section, it manifests that Australian producers' arrival at their new commercial rationales, notably those involved in niche production, is markedly different from their western European counterparts. At one level, this can be interpreted as a consequence of the accommodating responsiveness of producers in the EU to shifts in state regulation. On the other hand, and more interestingly, variations can be viewed as stemming from contrasting histories of agriculture's cultural embeddedness within Australian and western European societies.

In the western European context it is more pertinent to explore how the state has constructed post-productivist policies, which aim to restrict output and diversify the economic prospects for rural areas. Novelty production industries comprise chiefly state informed economic development initiatives, as opposed to the ostensibly market-led growth of new agricultural opportunities in Australia. The evidence of a rise of organic farming and the use of product origin measures relates to the underlying EU state principle which is to distinguish products that are derived from distinctive methods of production and specific origins, encouraging the development of local and traditional food-supply chains. Herein lies the reason for why small farming populations and such areas are being protected by the state from the full forces of globalised markets. They

play a crucial role in conserving vast and valuable areas of the European farmed environment and the socio-economic life of these marginal economic areas.

Most of the farms in these places are, however, economically marginalised and only continue to be viable at present because of agri-environmental incentive programmes and socio-economic regional policies under the CAP or the Social and Regional funds of the EU (Battershill and Gilg, 1996). Yet farming in the EU is having to disband with traditional systems of farm support under the acceleration of internal and external regional pressure. Central here is the confluence of the declining economic contribution of agriculture (2.5% of EU GDP, and 5.5% of employment, in 1995; *ibid.*) with developing macroeconomic fiscal stringencies (Marsh, 1996, cited in Marsden, 1998a). With higher levels of unemployment and an ageing population structure, nation states have been under pressure to limit public expenditure in order to avoid inflation and to stabilise currencies. In economic and political terms there is less perceived legitimacy in propping up what seem to be inefficient farm and rural systems. Thus there is an intensification of the conflicts between more welfarist rural development goals and the more marketised and globalised ideology of liberal food production and trade.

Interestingly, this divergence of interests is reflected geographically too. While the northern European members tread the economically rationalist path of taking on world markets, and reducing subsidies, countries such as Italy and France emphasise the nonfood market contribution of the farm sector to the rural economy. Other countries, such as Sweden and Finland, emphasise more social and environmental supports for extensive rural hinterlands.

These examples infer that the modern scope of specialty production sectors and environmental amenities in western European farming regions is equally suitable, if not more valuable, for conceptualisation in terms of ideas from studies of farming culture, and social histories of agriculture and food. Van der Ploeg (1992) attributes the variegated process of market integration within the European context to the plethora of different farming-institutional styles. He highlights the occurrence of 'vanguard farming', which is the transfer of technology from 'hotspots' to marginalised areas. This is a broad feature of north-western European nations. He separately identifies 'alternative farming', which is found in those areas that resist technological transfer and market integration.

It is debatable, however, that the scope of 'alternative' production cultures is closely dependent on regulatory support from the state. Institutions and protocols of regulatory regimes compose an important site of struggle for the mobilisation of alternative development strategies. Whatmore (1994) examines the institutional structures and political cultures of agricultural regulation in Norway and Sweden to reveal the contested interface between the highly competitive and global food sector and institutionalised farming interests. Norway's farming sector consists predominantly of family owned and worked farms. The political weight of farming interests is firmly institutionalised through two union organisations and a series of agricultural commodity cooperatives both with strong ties to the Social Democratic government which has dominated post-war government. The incorporation of farming organisations into the left political culture in

Norway is argued by Almas (1990) to have played a key role in Norway's resistance to membership of the now EU and the deregulation of agriculture and liberalisation of agro-food trade it would herald. In

Sweden, by contrast, the election of a conservative government in the late 1980s saw the marginalisation of institutional channels of farmers' political power and resulted in the most dramatic programme of agricultural deregulation yet seen in Europe (Wha tmore, 1994).

Institutional-backing or not, the reach of varied, sometimes new, production arrangements in the European context is clearly mediated by cultural influences, or farming styles. Bessiere (1998) argues the supply of niche food and drink products is more durable in agricultural areas in Europe since they are based on deeply-rooted cultural memories and knowledge. The revalorisation of culinary heritage resources in Aubrac, France provides such an example. Aubrac culinary heritage, which includes a cheese made by local shepherds for over a thousand years, comprises a major resource for local initiative. Bessiere writes:

“As early as the beginning of the 1960s there appears to have been strong determination to preserve those local products which were just about to vanish forever. They drew strength from a heritage deeply rooted in history and memories, long-established bonds between the population and its land, and the severity of the weather and the roughness of the environment” (Bessiere, 1998: 31).

By contrast, Australia has a chronicled reputation as an exporter of bulk commodities. This reflects the historical brevity of domestic markets, and the growth of an agricultural tradition hinged upon providing for overseas consumers, rather than established home-grown consumer preferences. Although native consumer trends are more apparent nowadays, Australia's production environment is still finely tuned to the whims and dictates of foreign consumers. The point being raised here is that the advanced degree of market integration and consumer orientation among producers in countries like Australia and the US can be seen to reflect a relative lack of cultural embeddedness of farming and consumer tastes, when compared with say parts of western Europe.

This section began by exploring the construction of producers' new commercial rationales according to political economy models, which emphasise the production of food and drink within an increasingly competitive international market. This mode of interpretation was breached in the last section, by recourse to ideas (advocated in cultural studies and ANT) which elucidate unaccustomed geographies of niche agri-food production as socially embedded and contingent at every turn, across a historical timeframe. The same is true of new geographies of consumption, as will now be explicated.

2.4 New food and drink markets

The growth of new globally-situated niche consumption and market trends must be considered alongside producers' economic necessity when coming to explain the diversification of Australian agriculture over the past decade. Rising domestic and overseas demand for unconventional or niche Australian food and drink products can be linked to a wider public interest in developed market economies about where food comes from and how it is produced (Bell and Valentine, 1997). For example, a survey of 16,000 people in 16 countries of western Europe learnt that consumers were becoming more interested in the geographical origin of food and favoured 'traditional' over 'mass' food production methods (CEC, 1998, in Ilbery and Kneafsey, 2000). Ilbery and Kneafsey (1998) suggest that consumers now increasingly esteem those products that can be tied to a particular place and/ or in association with a special means of production. It is arguable that interest in so-called 'authentic', 'locally-made' and 'traceable' food and drink products is an increasingly important social phenomenon in Australia. Three inter-connected factors can be identified at work here.

Firstly, consumers, apparently dissatisfied with the sameness of Fordist products and concerned about the health effects of the foods that made up a large part of the Fordist market, have begun to demand more variety and quality (Kim & Curry, 1993). Lyons et al. (2000), drawing from research undertaken with consumers in the Queensland cities of Brisbane and Rockhampton, argue that the 'greening' and growing quality mindedness of Australian consumers has arisen in response to a raft of negative health, animal welfare and environmental issues paired with productivist farming systems. These include destructive farming practices and food contamination scares. Consumer mistrust was widespread with the regulatory bodies that govern food standards, including, surprisingly, those that control organic farming methods and organic certification processes. In the wake of genetically modified food (GMF) scares, consumers also expressed considerable concern over the ability of science to produce healthy foods. This mimics findings in Europe, where consumer 'trust' in both official bodies setting food standards and 'science' in general was found heavily tarnished (McNaughten and Urry, 1998). This follows in the wake of food health and hygiene problems associated with the intensive or industrial model of food production, notably Bovine Spongiform Encephalopathy (BSE) and its human form, variant Creutzfeldt-Jakob disease (vCJD), and, more recently, the spread of Foot and Mouth disease in the British livestock sector, and the farming and consumer crisis it has spawned.

Reflecting the increased importance of quality in food and drink products, Lyons et al. (2000) document the increased value Australian consumers place on those products that are 'Australian made' because they exhibit a traceable origin of production, including those retailed under the Dick Smith label, as well as produce sold at local markets. The rapid market growth of organic food in recent years is another illustration of the accent on quality placed by consumers. The value of the organic food and drink industry worldwide is approximately US\$20 billion and is growing at a yearly rate of between 20 and 50 percent (Lyons et al., 2000). To meet this demand, throughout the world, farmers have begun to increase the scale of organic production. 7.6 million hectares of land in

Australia are certified organic (much greater than the US with 1.3m hectares and Europe with 3m hectares). In 1990, the organic industry in Australia was worth \$28 million. By 2000, the annual retail turnover was between \$90 and \$100 million, about a third stemming from export (DPI, 2000).

Also symptomatic of these trends is producer diversification into Asian vegetables. This has occurred in line with new domestic articulations for, aside from quality, greater variety of fare. The increasing Asian influence on cuisine in Australia has led to the concentration of production on the outskirts of the main state capital cities – Sydney and Melbourne, in particular – and the Sunshine Coast. This has been complemented by a fast growing export sector, historically exporting Chinese cabbage to Asian markets but evolving to export a wider range of high quality vegetables. The market for Australian-grown Asian vegetables in Asian countries is potentially large. For instance, Japan imports \$2.3 billion of fresh, frozen, preserved and dehydrated vegetables each year (Byrne, 2000).

An aside here is the concern with how the growth of varied and quality-oriented consumption trends has necessitated the spread of new quality assurance (QA) schemes. These are administered increasingly by the private sector in the wake of the agricultural sector's deregulation. The establishment of regulatory schemes that are linked to markets are proving successful as a way of changing producer behaviour. The Australian organic industry represents a practised model of quasi-market regulation of land stewardship. The 'Kiwi Green Programme' in New Zealand and the quality programmes of the Australian beef and wool industries are further examples of market linked regulation programmes. MacGauchie makes a telling point here:

“There may be a role in promoting the need for QA by governments and other external bodies, but in the end it must be those with commercial investments at stake who make the decisions and drive the implementation process” (ibid., 1997).

Secondly, the consumption of certain types of food and drink has become a statement of taste, fashion and sophistication by relatively affluent sectors of society. By consuming certain products, one consumes certain symbolic characteristics, placing the consumer in a new socio-cultural order (Bessiere, 1998: 24). 'Foodies' and 'wine buffs' are just two examples. Lockshin and Rasmussen (2000), in their demographic analysis of Australia's wine drinkers, attach great importance to whom they term the 'aspirational wine consumer'. The aspirational segment is primarily concerned with the symbolic roles a wine brand can play, including the status attached to the brand and the effect the brand has on their self-image. Kidd (1999) states that among subgroups of consumers a bottle of wine

“is expected to make all the right social statements on the table. It should never be underestimated how reputations can be established and sales generated over a meal” (Kidd, 1999: 85).

Thirdly, there has been a kindling of interest in distinctive locally produced food products in the face of increased consumer knowledge (Marsden, 1992). In Australia, this has been led by rising public interest in nature, ancestral cultures and local culinary heritages. Wild-harvested bushfoods, ranging from Muntries, Lemon myrtle, Quandong, Wild lime and Illawarra plum, have all grown in popularity in recent years, supporting an industry with an estimated farm-gate value of \$12 million. A bushfood gourmet restaurant industry has taken root in Australia's capital cities. The strong growth in the consumption of other distinctly Australian products like kangaroo, emu and crocodile attests this trend further. Such commoditisation of local culture can help to 'revalorise place through its cultural identity' (Ray, 1998: 3), a process which Marsden (2000) describes as *cultural relocalisation*.

An appropriate question here, given Australia's multiculturalism, is to what extent can locally-produced foods be embedded in any given locality? Cuisines with a clear rootedness in place have demonstrated an ability to migrate: Bell and Valentine (1997) cite the example of the emergence of Balti² restaurants in Birmingham, UK. Turning to Australia, there is the 'imported' status of what are now accepted as authentic Italian, Lebanese, Greek and other Mediterranean cuisines. If one focuses on consumption figures, so-called 'imported' cuisines consistently out-perform those cuisines that may be regarded as more 'traditionally and 'authentically' Australian, such as bushfoods. Olives, a staple-food of the Mediterranean diet, have proved one of Australia's most lucrative sunrise industries. Australian consumption has grown in the past 10 years from a \$30 million market in 1988 to \$110 million in 1997 (Gomez, 1999). The anticipated harvest is expected to increase from 2,500 tonnes in 1999 to between 37,500t and 52,500t by 2006 as producers respond to changes in domestic demand.

The emergence of niche farming enterprises in the Australian farm sector is clearly as much consumer as it is producer driven. This is a particularly topical issue at present, as the scare about mad cow disease and its transmissibility to humans is combining with outbreaks of foot-and-mouth disease in Europe to produce a consumer aversion of beef, which is spilling over into other locally produced meats. In the wake of the misfortunes of other producers, it is now possible that kangaroo meat production and export may emerge as a more important rural industry in Australia. Related to the establishment and growth of alternative farm production in synch with niche market trends based on 'safe' or specialty food and drink products (SFDPs, Ilbery, 1998) is the fact that they form an important instrument for enhancing the profitability of Australia's rural sector. The Rural Industries and Research Development Commission (RIRDC) systematically advocates the benefits of new industries to Australia's agricultural regions. These include stable growth in employment, new investment opportunities, and greater social well being. Greater environmental sustainability is another implication, an aspect to which we now devote greater attention.

² Balti is a blend of British and Bangladeshi cuisines unique to Birmingham, UK.

2.5 Environmental and ecological values

Growing environmental regulation of agriculture is considered part of the 'post-productivist' phenomenon enveloping places in the Australian countryside. However, there are some important contrasts in agri-environmental practices on farms in Australian and Europe.

First, European governments acted to redress environmental problems markedly earlier than their Antipodean counterparts. By the mid 1980s, the majority of European farmers were under increased regulation by the state. There were limits on the application of fertilisers, constraints on the types and rates of application of agrochemicals, the imposition of higher minimum standards of pesticide residues in food products, and subsidies to farms under lower input-output systems. While a number of these measures petered outside the realm of policy, they still significantly predate any commitment made by the Australian government to redressing environmental problems. Infact, writing in 2000, McManus and Albrecht argue that land clearing, dryland salinity, diminishing water resources and loss of biodiversity continues to be neglected by state and federal government.

This leads into a second relevant point. Whereas agri-environmental elements of the PPT in Europe were brought about by state regulation, in Australia it reflects a greater participation and collaboration between producers and corporate agri-business, and locally based informal organisations. This current regulatory make-up is in fact now evident in Australia and Europe alike. Rural areas throughout developed market economies, according to Marsden (1998), are now at a critical crossroads associated with servicing the highly competitive and global food sector, on the one hand, and the increasing need to supply a sustainable and diffuse resource base for both urban and rural populations on the other.

It is argued here that changes to more sustainable farming practices in Australia are derived from private enterprise efforts in the wake of retracted assistance by the state. The current Coalition federal government supports the view that a more competitive agricultural production sector will in turn yield positive repercussions for the environment. This sentiment was reinforced by the establishment of the National Competition Council (NCC) in 1995. Its aim is to make agricultural production and marketing arrangements subject only to free market regulation, unless compelling net public benefit reasons can be identified. It is conjectured profitable, market-oriented farming has more capacity to deal with environmental issues than do heavily subsidised farming systems. Farmers who are not dependent on subsidies and who must remain sensitive to the needs of the market are argued to have a different attitude to landuse. For these farmers, the quality of the land needs to be maintained in top condition to safeguard their production and income base in the future. In addition, provided farm incomes are adequate, there are numerous opportunities to establish new farm management practices which can effectively deal with environmental concerns.

For instance there is the rapid growth of organic farm management practices in recent years in order to service domestic and overseas markets alike. Segments of producers across the industry are extensifying and converting to organic farming production methods. Monk (1999) shows how Opal Beef Exporters (OBE) in semi-arid parts of Queensland are converting production to organic methods in synch with new market pressures. Asked why they are ‘turning’ to organic practices, the farming groups acknowledged that maintaining the existing intensity of production challenges the carrying capacity of the local environment. New farming methods include reducing the absolute number of livestock and increasing the mixture of pastoral operations across a variety of terrains. Consequently, the need for chemical pesticides and residual agrochemicals will be reduced.

Integral to the current government’s platform on a ‘competitive, sustainable agriculture’ is the shift in attitude towards ideas of individual ‘community action’ rather than broader regional structural assistance. Environmental assistance programmes are evolving where there is less an industry and more a spatial focus. Producers, conservationists and government bodies are responding to environmental imperatives through participation in locality-oriented Landcare groups. Landcare originated in Victoria in 1986 and emerged as a national programme in 1989 due to the joint efforts of the Australian conservation foundation and NFF (Lockie, 1995; Martin, 1995; cited in McManus and Albrecht). A recent figure estimated the number of Landcare groups to be approximately 4,500.

In fact, while non-government organisations are working hard to redress some of the damage inflicted on the environment by past mismanagement, these efforts pale in the face of ongoing vegetation clearing and the expanding demands of intensive agriculture. Rural producers are deemed responsible for massive environmental desecration estimated to be costing Australia approximately \$1.7 billion per annum (Price, 1998, cited in Lawrence and Gray, 2000). It is acknowledged that the impact of agriculture on native plants and animals has been most detrimental in the pastoral zone, and current farm investment in sustainable practices has been rebuked for being “inadequate” (SCARM, 1998: 1-2, cited in Lawrence and Gray, 2000).

Achieving sustainability in farming is made difficult however by the issue of subsumption (Gray and Lawrence, 2000). Subsumption refers to the process whereby farms become increasingly subservient to off-farm organisations – particularly those of large-scale capital. For industries like beef, dairy, cotton and broadacre production, farming is tied to processing and marketing by way of direct ownership or more likely contracts. In this case, farmers simply have to meet the terms and conditions of those to whom they supply. Crucially, this loss of independence can involve forsaking their capacity to manage their farms as sustainably as they might wish (Lawrence and Gray, 2000).

Similarly, contractually unbolted, smaller farmers are caught between survival and the need to meet broader environmental objectives. The decline of rural and regional Australia from high employment and the expansion of transportation and financial services leads to a sense of vulnerability about the future in these areas (McManus and

Albrecht, 2000). Factors which compound this loss, such as environmental issues, are often viewed with resentment. While many farmers face financial pressure to maximise production, a proportion are farming in areas that have low and irregular rainfall, plus issues of erosion, salinisation, pest control, loss of biodiversity and global climate change. This segment of farmers can be viewed thus as subjugating environmental imperatives for the purpose of maintaining a viable farming livelihood.

The lack of importance assigned by lower-income segments of the farming community to the environment is fanned by two other factors. Firstly, the current neoliberal mode of thinking in regional development has led to instabilities in local environmental agendas. Government promotion of 'capacity building' effectively effaces its capacity to change by emphasising 'self-help' and individual-action. In rural areas, this could abet social divisions, given the individualistic ethos inherent to these areas in the first place.

The second influence derives from discussions of Aboriginal land management practices. According to Flannery (1994, cited in McManus and Albrecht, 2000), it was common thinking in the environmental movement in Australia during the 1970s and 1980s that unoccupied land was to be thought of as 'wilderness'. It has emerged recently that the entire continent has in fact been extensively managed for 60, 000 years by its original occupants. The level of impact Aboriginal people have had on the environment is hotly debated. Flannery suggests that the early Aboriginal people were environmentally reckless who reorganised components of the ecosystem to suit their own interests. Returning to the point being made, Flannery-type arguments about the true nature of pre-1788 vegetation have been appropriated by graziers and other producers to defend increased fire frequencies and further clearing of semi-arid and marginal agricultural land. Expansion of land clearing rates in Queensland in the latter half of 1999 have been described as among the highest in the world (Roberts, 1999, cited in McManus, et al. 2000) and have been vindicated by farmers with the argument that 'woodland was more open when it was burnt by Aborigines, but had now "thickened" to the point where it had to be "pulled" to make it suitable for cattle' (Roberts, 1999: 38, cited in McManus and Albrecht, 2000).

It has been alleged that federal and state governments have been passing off real environmental problems onto the backs of rural producers (Egan, 2001). State-government initiatives are however increasingly seeking a number of ways by which to protect the natural resource base, namely soil, water, and biodiversity, from further misuse.

A fitting example here is the wine industry. State government agencies in recent years have invested considerable resources in grower education and extension services with regard to water management. The main problem with watering vines, or any crop, is the risk of salinity (concentration of salt in soil or irrigation water) problems. Growers are being made aware of new techniques aimed at preventing soil salinity. These are developed through the inter-state Cooperative Research Centre for Viticulture (CRCV), and include experimentation with partial rootzone drying (PRD) and drip irrigation technology, which result in a 30% saving. What is for sure is that far few growers are

now using high volume overhead spray or flood irrigation techniques. In addition, regulation has been tightened. A license must be acquired to put down a bore, and water restrictions apply. In fast expanding wine regions, water is in demand and bore licenses must be bought from an existing holder. In the case of Yalumba, in the Wrattenbully area of South Australia, it was able to buy a license from a lucerne (forage plant) grower. The flow on from that is far less total water usage, as a lucerne crop is a larger consumer. Egan (2001: 91) makes a supporting observation:

“personnel from branches of the research institutes, universities and state departments of agriculture are getting out from behind their desks. They can be seen out in the field with the growers, working to reduce inputs”.

Another wind of change is seen in the growth in collaborative relationships between sections of Aboriginal people and other rural parties. This follows the formal acknowledgement in countries such as Australia of prior Aboriginal occupancy, and the new, legally supported claims that indigenous Australians have on traditional land and its flora and fauna. Under the 1993 Native Title Act, Australian statutory law recognised a form of native title to land. This followed the overturning of the doctrine of terra nullius by the Mabo High Court judgement in 1992. Terra nullius, which means ‘land belonging to no-one’, was used to justify the appropriation of Aboriginal land since 1788 (Burt and Eagleson, 1993, cited in McManus and Albrecht, 2000). The legal precedent established in this case has transformed relationships between Aborigines and other major groups in rural and regional Australia. Pastoralists, graziers and miners now have a legally based constraint on what they can do on land that has, or might have, a valid claim to native title by an Aboriginal clan. Beyond legal constraints, farmer groups have adopted policies and guiding principles to develop positive relations with Aboriginal communities living in or near areas of production (Howitt, 1998; in McManus and Albrecht, 2000).

In brief, there are tangible signs that environmental concerns are becoming increasingly central to many producers’ decision-making processes. These, alongside recognition of Aboriginal land rights:

“amount to a context that has never been seen before in Australia. Environmental and Aboriginal claims set limits on Western-style development that have previously been ignored, and suppressed” (McManus and Albrecht, 2000: 108).

This leads into a related point. A fraction of environmentalists, politicians and agricultural producers are displaying a willingness to work together in line with the concept of ecologically sustainable development, “where a key issue in regional areas is the recognition of the physical, climatic and ecological limits within which all forms of human development must operate” (McManus and Albrecht 2000). Landcare, it has been shown, illustrates the ability of some farmers to work with environmentalists. Newcomers to farming are another vital new force. They are often technically trained and have a love and feeling for the land and its worth: “these are people who can make change and are able to look at the whole picture” (Egan, 2001: 132).

While ecological and Native Title responsibilities have had a durable impact on farming techniques and practices in places, their scope and impact is still limited. Growing environmental regulation must be reconciled with, first, producer recognition of the finite nature of their income-base, and second, the adoption of more sustainable management practices on the farm. The wine industry, for instance, backed by government legislation, is providing commercial incentives to help retract ills such as rising salt tables, the unsustainable quantities of water used to increase yields, chemical sprays on the vines and pollutants in the waterways. Nevertheless, Australia still has a long way to go to protect the land's future. If current practices continue to go unmonitored, the wine and other farming industries will be seen as having attitudes based on short-term gain rather than long term sustainability, which is a highly undesirable trait for any component of Australian agriculture.

2.6 Chapter summary: a comparison of the PPT in its Antipodean and European settings

This chapter has explored how aspects of an Antipodean PPT are evolving in certain Australian rural places and farming communities. At the outset, new producer' rationales were examined to gauge the extent to which they have emerged in response to the increasingly parlous state of Australian agriculture from the mid-1980s onwards. The production of food within an increasingly competitive international market, allied with the progressive withdrawal of state subsidies across all farming sectors, is perceived to be forcing farmers to perpetually reduce costs to maintain their competitiveness. In order to keep economic viability, agriculturists are implementing a number of coping strategies, including diversification of on-farm activities. Thus, for a proportion of farmers, often those that are structurally and geographically marginalised, alternating production offers a means of spreading market and seasonal risks. As was revealed in the last section, however, jeopardised producers are least likely to view diversification as an incentive for more ecologically sustainable production, either by itself or in combination with other, existing traditional activities such as beef, wool and wheat, thus depleting the income base in the long run.

Otherwise, it was found that on-farm diversification practices, including the incidence of niche production, more tangibly reflect farmers' experimentation with a wide range of new enterprises in an endeavour to find profitable, alternative uses for their land. These are developing in synch with concurrent consumer and environmental discourses, as is evidenced by the fact that they are displaying a capacity to rearrange production activities on the farm. Moreover, the spread of niche farming is made possible by the increased market exposure wrought in the current deregulated, market landscape, which by association would imply its uptake among a more financially moneyed and secure class of farmer.

This acknowledgement forces a refutation of one of the key tenets of the PPT outlined in its European shape, namely the extensification of production. Niche production ventures in their Antipodean mould symbolise a segment of capital-intensive farming

entrepreneurs seeking to capture the new commercial opportunities presented by the evolving Australian and overseas palates. In the EU, on the other hand, niche production is more a feature of small, capital extensive farms in economically marginalised places.

This reflects two factors. First, niche production in its western European form concerns distinctive, traditional, locally-produced fare. There is a historically ingrained cultural attachment to the provision of food and drink and the embeddedness of agriculture within rural society more generally, which is not so apparent in Australia. Moreover, in certain places, niche farming is less a commercial activity and more one of subsistence. In, say, France, those farmers who engage in the retail of specialist produce often do so by direct selling at the farm gate, selling surplus food cheaply to local villagers as a means of subsistence (Gilg and Battershill, 1998). In Australia, on the other hand, the market-led competitiveness of the agriculture sector is prompting farmers to diversify production and secure new, value-added synergies.

Second is the influence of varied policy environments. Commercial niche production strategies in the EU arguably constitute state-informed rural development programmes, seeking to encourage a return to more traditional, sustainable farming systems. Most of these farms only continue to be viable at present because of agri-environmental incentive programmes and socio-economic regional policies directed by the CAP or the Social and Regional funds of the EU (Battershill and Gilg, 1996).

Niche production ventures in the Australian countryside also accord with environmental and consumer sensibilities. However, these are mediated by the space of the free market, rather than the state.

To conclude, it is apparent that high-input, high output farming, with an emphasis on food quantity, is still mainstay in Australian agriculture. However, these systems of farming are being complemented by the spread of small-scale farms specialising in quality food and drink production, the promotion of environmental amenities and farm related service activities, such as farm tourism. With regard to niche farming, whilst small farms cultivating a variety of produce have always existed in Australia, these have often existed at the economic and geographical margins of production. This chapter has illuminated that the current incidence and growth of smallholdings tends to be largely capital-intensive and hence is not the specific product of structural marginalisation. Rather producers are looking to lessen reliance on diminishing and residual markets for bulk agricultural commodities, and move towards increasing the supply of value-added products. These new farming trajectories are importantly being re-regulated in line with contemporary, middle-class sensibilities of quality in food and drink, inherent to which is an emphasis on greener farming ideals. Aside from consumer accents, environmental regulation of small-scale farming and farming more generally is growing in tandem with the increasing adoption of sustainable farming systems at industry levels and the new ecological responsibilities that have arisen from ongoing government and popular debates over Aboriginal land occupancy and the Native Title Act.

3. The growth of small-scale grape growing and winemaking production in Orange: signs of a post-productivist transition in the NSW countryside?

In this chapter, the growth of the grape growing and winemaking industry in the Central West NSW region of Orange is used as a way of exploring the redefinition of productive spaces within rural areas towards quality or niche production. It is shown in this chapter that such enterprises ill-fit categorisation as pluriactive farms, where, for example, the broadening of on-farm economic activity has been adopted as a coping strategy in order to keep economic viability. Rather, specialist viticulture and winemaking represents a tactic whereby small-scale producers are capturing new, value-added commercial opportunities.

The second strand of analysis in this chapter concerns findings that small-scale or boutique vineyards are increasingly capital intensive ventures, contradicting the idea popularised in studies of the PPT in western Europe that post-productivist farming is capital extensive by definition (Ilbery, 1998). The spread of progressively more commercial and formal production relations in the boutique wine sector is explored as indicative of broader economic restructuring processes, known as 'globalisation', which are acting to remodel the highly fragmented global wine industry. A case study of farmers' participation in the production sub-field of information exchange is presented. It shows how Orange's producers are actively brokering new partnerships in this field with a range of agents, including university research bodies, local producer groups, and representatives within the 'vitibusiness' sector. This corresponds with the retraction of geographically invariable, one-sided public government assistance in technological affairs, which is examined in relation to the intensification of global market forces.

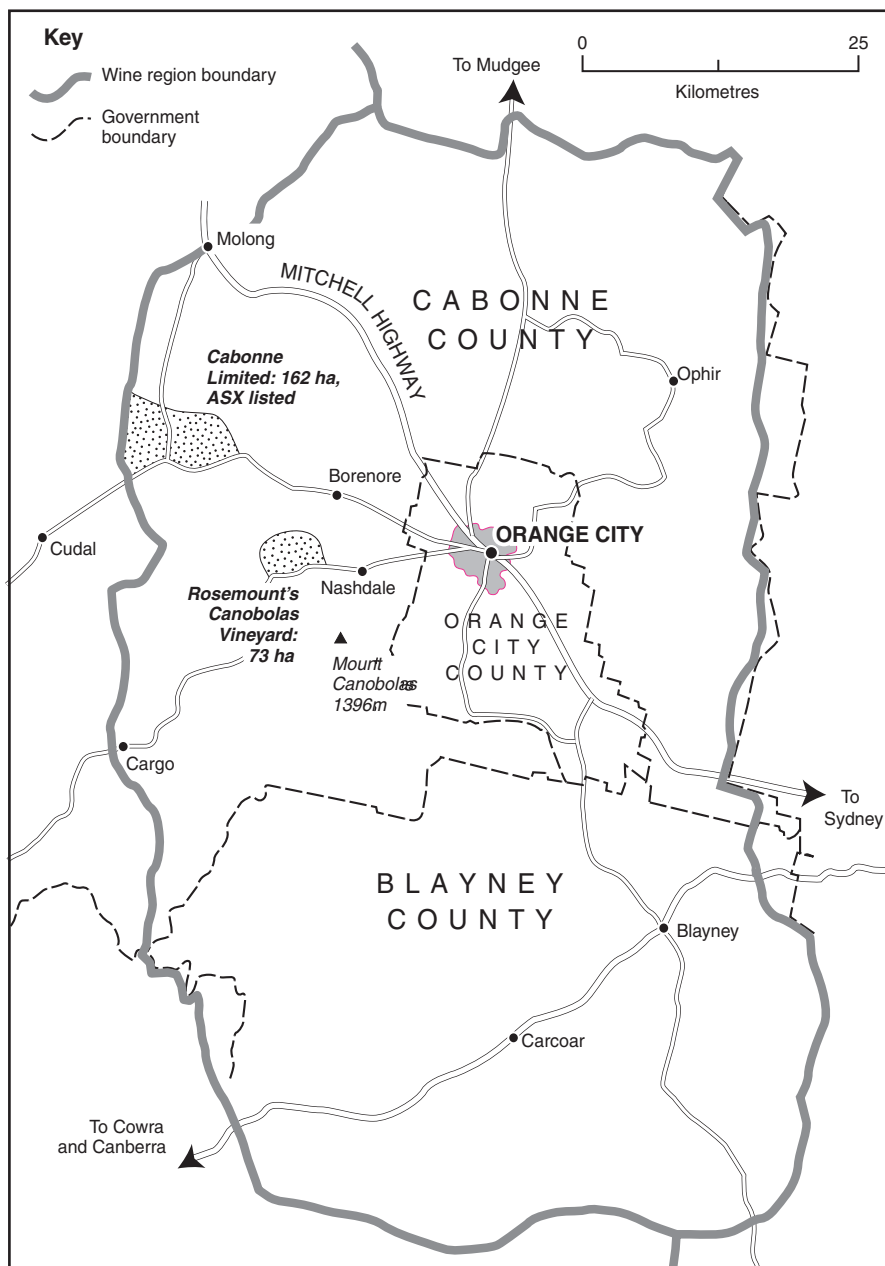
In the realm of information exchange, it is illustrated that viticulturists are actively applying vineyard-situated, practically and conversationally derived knowledges. Shifting the focus of expert-lay knowledge interface studies from knowledge forms to knowledge cultures enables us to explore how people as social beings relate to, make sense of, and socially construct their environments and identities. The last section in this chapter therefore relates these beliefs to Orange's small-scale viticulturists, and their usefulness in terms of thinking about how farming activities are associated with lifestyle and cultural choices. Those farmers associated with particular lifestyle choices, then, can be theorised as consuming particular aspects of rurality; and the last section seeks to uncover the ways in which notions of rurality and farming are selectively constructed by those involved. This in itself points to a wider consideration: to buck the trend in farming literatures to evaluate the farm and farmer solely in terms of economic production. It pursues ideas raised in the preceding chapter which conceptualised the growth of alternative farm enterprises as socially and culturally suffused.

3.1 Orange grows in the grip of the grape: the burgeoning shape of the Orange grape and wine industry

The wine region of Orange is located within the Central Ranges Zone of New South Wales, Australia (see Map 1.1). The Orange district, defined as Orange City Council area and those sections of Blayney and Cabonne Shires between 600m. and 1050m. in elevation (ORVA, 1997), is both a wine grape cultivating and winemaking region (see Map 3.1).

Map 3.1 The political and physical geography of the Orange wine region.

Source: MPA



Wine grape growing in the region began in the early 1980s and is now experiencing strong growth and expansion. Plantings in the Orange district approximate to 1400 hectares, of which 1000 hectares were harvested in the 2000 vintage, approximating to 6,910 tonnes (NSW Wine Industry Association, 2000). This ranks Orange the fifth³ largest regional wine grape producer by volume in NSW, itself Australia's principal source of wine grapes after South Australia⁴. In fact, planting is yet to reach a critical level, and production is forecast to continue growing robustly in line with statewide trajectories (see Table 3.1):

“While all NSW wine grape growing regions lifted production in 2000, the most dramatic increases are occurring in the newer areas such as Orange and Cowra” (Patterson, cited in *The Land*, 7.12.2000).

Table 3.1 Oncoming wine grape production by hectares in Australia by state: New South Wales has 22.2% of new plantings made between 1998 and 2000, indicating a net growth in future output from the state compared with other states.

Source: ABS, 2000.

State	Bearing (ha) in 2000	Not yet bearing (ha) in 2000	hectares expected to bear as a % of current bearing hectares
South Australia	35013	8903	20.2
Victoria	21651	4421	16.9
New South Wales	17007	4880	22.2
Western Australia	3511	979	21.8
Queensland	1041	364	25.9
Tasmania	379	156	29.2
Total Australia	78709	19730	20.0

The growth of wine grape enterprises builds on a rich tradition of local horticultural production. As New South Wales' largest supplier of apples and pears, a major producer of stone fruits and vegetables, Orange calls itself the 'Food Basket of the State'. Table grapes were historically a major crop. Their production diminished in line with increased cultivation of wine grapes.

The growth of vineyards in the region's twenty-year history has been supported by a strong winemaking industry, including a small, local winery circuit. In the 2000 vintage, approximately 80% of the wine grapes produced were vinified and marketed as Orange region wine. The Central Western Regional Institute (1998) estimated that unprocessed grapes from the 1998 Orange harvest were worth approximately \$7.5 million and that the

³ In terms of wine grape production by volume, Orange is ranked fifth, after the Riverina (12,000 hectares), the Hunter and Mudgee (3,500 hectares each), Cowra (2000 hectares), but ahead of Canberra and Tumbarumba (200-300 hectares each).

⁴ Winegrape production in NSW was estimated in 2000 at about 240,000 tonnes, or about 25% of the expected national production of close to one million tonnes (ABARE, 2001).

bottled product was worth about \$50 million, suggesting that each tonne of wine grapes had a final marketed value of \$4,166. This is significantly higher than the bottled value of wines emanating from the Riverina, which is the largest wine region in NSW in volume terms. For the 2000 vintage, Pritchard and Arrowsmith (2000) suggest that the 163, 719 tonnes of wine grapes grown in the Riverina area had a final processed value of \$1650 per tonne. Data inferring the marketed value of Orange wine for the 2000 vintage are not available. If it is assumed that the ratio of value adding in the Orange wine sector has not changed since 1998, it can be suggested that the 6,910 tonnes of grapes of wine grapes purchased from the 2000 vintage (NSW Wine Industry Association) had a final bottled value of \$28.8 million.

The Orange wine region is comprised mainly of small-scale or boutique enterprises. The regional producer group, known as the Orange Regional Vignerons Association (ORVA), binds a membership of sixty-six wine grape growers, sixty-one of which can be considered small-scale or boutique vineyard enterprises. Eighteen small-scale vignerons⁵ have established Orange winemaking companies or labels – approximately one-third of all growers - inferring the extent to which producers nowadays are seeking to engage in value-added components beyond the farm gate (see Table 3.2). The remainder of Orange’s growers forms a mixture of suppliers of other state or national wine companies, and fruit processing companies.

The nature of the Orange boutique wine industry, as represented by the respondents to a survey conducted by the researcher, is outlined here. The survey was administered to thirty-one small-scale grape growers, fifteen of which were also wine companies (see Appendix 1)⁶. Detailing ‘boutique’ grape growing and winemaking production and business characteristics, gleaned through the survey, provides a context for the discussion of more qualitative material on grape growers’ and winemakers’ activities.

Table 3.2 The Orange wine region’s winemaking company (co.) structure.
Source: researcher’s survey.

National companies	Medium-sized companies	Small-scale co.
Cabonne Limited	Capercaille Canobolas Vineyard (Rosemount) Hillside Reynolds Yarraman Tamburlaine Briar Ridge	Canobolas Smith Ibis Wines Cargo Road Wines Habitat Brangayne Donnington Faisan Gold Dust Nashdale Indigo Ridge

⁵ Grape grower is used interchangeably with vigneron for the duration of the current study.

⁶ Interviews with growers and winemakers were conducted in Orange in October and December, 2000.

Bloodwood
 Wellwood Estate
 Logans
 Highland Heritage
 Templer's Mill
 Forest Edge
 Bantry Grove

The size of a boutique wine company is directly proportional to the size of land in production. These are essentially agriculture-based vineyards. No boutique wine companies farm parcels of land greater than 20ha in size. In fact, the great majority of grape growers hold between one and four hectares (see Table 3.3).

Table 3.3 Boutique vineyard size and number.
 Source: researcher's survey.

Vineyard size (ha.)	Frequency (n.)
>1	3
1-4	16
5-10	6
10-15	4
15-20	2

Five boutique wine companies operate more than one vineyard. For example, Canobolas Smith divides production between three geographically separate paddocks. Six of these enterprises own operating, in-house wineries: Canobolas Smith Wines, Cargo Road Wines, Faisan Estate, Ibis Wines, Forest Edge Vineyard, and Osmond Wines. This small-scale winery circuit has developed in line with the growth of grape growing enterprises since the early 1980s.

Secondly, there are medium sized, family-owned wine companies, which hold vineyards approximately between 20-80 hectares in size. 'Canobolas', which is Rosemount wine company's Orange-based vineyard, is a 73ha paddock (see Map 3.1). The third scale of operation is the national corporation. The largest vineyard in the region, known as 'Quondong' and located in Cabonne Shire, comprises 162ha, and is owned by Cabonne Limited, the largest winery in Orange (see Map 3.1). It forms one of four premium quality wine grape vineyards owned by Cabonne Limited, which all together cover 869 hectares of land at various cool climate locations in NSW.

The Orange region is currently planted to 75% red wine grape varieties and 25% white wine grape varieties in terms of hectares (see Table 3.4). A sole focus on acreage or tonnage of production and their aggregated economics does not however establish the nuances of grape varietal production mix, neither in the way Orange, as a cool climate viticultural appellation, is more attractive to certain grape varieties above others, nor the way in which, say, overseas consumer preferences for Australian wine are far stronger for

red wines. Holding size, therefore, is clearly a factor in thinking about the boutique wine industry but, as is (and will be further) shown, boutique grape growing and winemaking is about more than production at a small-scale.

Table 3.4 Wine grape varietal production mix in Orange (hectares and tonnage) and weighted average grape prices for the 1999 vintage.

Source: NSW Wine Industry Association, 2000.

Wine grape variety	Hectares	Tonnage	% total hectares	% total tonnage	Weighted average Orange grape price (\$/tonne)
White					
Chardonnay	121	1158	10	27	1236
Sauvignon Blanc	78	129	7	3	910
Semillon	19	18	3	0.4	1180
Riesling	23	19	3	0.4	1250
Total white	241	1324	25	31	
Red					
Shiraz	347	1623	30	37	1264
Cabernet Sauvignon	336	850	29	20	1279
Merlot	132	351	12	8	1253
Pinot Noir	27	97	3	3	n/a
Total red	842	2921	75	69	

3.2 New production arrangements in grape growing and winemaking: pushed or pulled?

The objective of this section is to test arguments influenced by agrarian political economy that the uptake of small-scale enterprises in the Orange grape and wine industry represents a kind of coping strategy in the lee of developing fiscal stringencies in segments of farming. Elaborating this argument requires sketching the number of viticulturists who have converted from or are farming in combination with traditional industries, and the socio-economic context for these decision-making processes. Data for this purpose is drawn from interview-surveys with the said segment of viticulturists (see Appendix 1). From the thirty-one grape growers surveyed, twenty-seven responses lodged usable explanations for their engagement with viticulture and (in some cases)

winemaking. Ten have diversified into grape growing from alternative farming systems, and the remainder, seventeen, constitute a cohort completely new to farming.

New production arrangements, as a form of agricultural diversification, are conceptualised invariably in the existing political economy body of literature on the PPT as aspects of structural adjustment, previously and diversely called ‘survival and accumulation strategies’, ‘elements of farm adjustment’ and ‘farm business development paths’. Gasson (1986), for instance, argued part-time farming is often adopted as a ‘survival strategy’ in the face of declining farm incomes. Gray and Lawrence (2000), by highlighting the crisis in Australian agriculture, suggest implicitly that farm survival requires mobilisation of coping strategies such as diversification and value-adding niche production. Survey data collected from Orange’s boutique grape growers and winemakers show that the application of these ideas in the current study is seldom.

From a survey response of twenty-seven, a very slim proportion (n. 3) of vigneronns have struck new agricultural arrangements that accord with early definitions of post-productivism as aspects of structural adjustment. The remainder of farmers that have diversified into grape production can thus be viewed as not constituting a heavily marginalised segment of farmers. It emerges from the survey data that producers are in fact envisaging the challenge to diversify and capture the unprecedented commercial possibilities the evolving Australian and foreign wine palate offers. With rates of return from the wine sector higher than more traditional industries, a significant percentage of regional farmers have replanted their farms with vines. The shift towards wine production by local agriculturists in Orange in the past 10 to 15 years is expected to grow further. According to Peter Hedberg, a lecturer in horticulture at the University of Sydney’s Orange-based Faculty of Rural Management:

“There are a lot of farmers deciding to move towards the more profitable wine industry, particularly with the higher land values and weak wool market. These farmers prefer to add value to their properties and are taking advantage of the popularity of the wine sector (pers. comm., 2000)”.

Moreover, the establishment of competitive production facilities and the gathering of technological know-how are capital intensive activities. The variability of cool climate wine grape growing conditions has further forced a proportion of growers to handle agricultural research and development themselves. These factors explain the fact that profits are rarely seen in the first five to eight years of production (Hedberg, 1999). Nonetheless, the fact that grape growing enterprises comprise relatively large capital undertakings is sufficient to jettison the notion that they form some kind of ‘survival strategy’.

This is equally true of those new vineyards which represent a diversification of enterprise from pastoral farming. Four newcomers from this industry subset continue to farm viable pastoral operations elsewhere in the region, indicating their financial firmness. Sheep and livestock graziers alike have made important contributions to the strong growth in viticulture in the Orange district. At the same time, these industries remain active at a

regional scale, as is evidenced by the observation that cattle and sheep are predominant over wide areas of the Orange countryside. It is also reflected in the growing concentration of processing facilities within the region's more dynamic areas like Orange City. The presence of three national milk companies, and their processing plants and dairies, indicates the significance of regional milk production. With respect to beef, productivity has continued to grow over the past decade. The Orange City abattoir has continually expanded production in the past ten years and currently employs 100 people.

3.2.1 Pushed?

Only three viticulturists fully converted production from existing agricultural commodities in order to remain viable as farmers. All three are orchardists. In this style, their conversion to grape cultivation can be ostensibly viewed as a so-called survival mechanism. Restructuring has been two-pronged in orcharding. First, since the early 1990s there has been a sustained decline in market prices for stone and other orchard fruits. Secondly, this has occurred in line with substantial economic pressures to increase economic efficiency and productivity. To remain competitive increasingly has required the transfer of new production technologies, in particular new seed varieties. This reflects consumer articulations for new and different varieties of orchard fruits. The expense of this procedure, allied with concern among producers over the adaptation of new seed varieties to different biological and geophysical conditions in the Orange growing region, forced a significant percentage of smaller orchardists to exit or switch production. Brangayne wine company is one such example. For forty years, Brangayne was an apple, peach, pear and cherry orchard. Then, in 1994, struck by the beginnings of a downturn in the fortunes of the orcharding industry, the estate's owners decided to convert production to grape cultivation. Between then and 1997, Brangayne was planted to 12 ha of Chardonnay, Pinot Meunier and Sauvignon Blanc, while 'Ynys Witrin', a paddock on the other side of Canobolas mountain, was planted to premium red winegrape varieties.

To conclude, from a survey response of twenty-seven, only three farmers can be deemed to have diversified into grape growing as so-called 'coping' or 'structural adjustment' policies. This finding runs counter to the observation that significant segments of certain Australian farming industries are no longer commercially viable (Gray and Lawrence, 2000). Otherwise, it is possible to identify a breed of expanding producers, whom are driven by a vision of profitable enterprise in the vineyard. This type of grower, it is inferred, yields grape and wine outputs that are sufficient to guarantee a continuing market return on investment in land and capital. The relative prosperity of the overriding majority is also reflective of Orange's historically affluent, mixed agricultural economy.

3.3 The capitalisation of boutique enterprise

The fiscal solidity of the greater number of viticultural investors pinpoints a discernible shift in the nature of Orange's boutique wine enterprises: namely their increasingly intensive capitalisation. Three facets are noted here. First, data is provided on the capital costs of establishing a vineyard, and the production costs of an established vineyard. This data is derived from the grower survey conducted by the author as part of the current

research. Detail is also given to the augmentation of a number of grape-growing estates into integrated, tourist developments. Second, the influx in recent years of a number of national and intra-state wine companies, and their movement into the value-added segment of the wine industry, is shown as propelling small-scale enterprises in the same direction. The swelling formalisation and commercialisation of relations of boutique production is discussed as part of the wider question on the extent to which post-productivist agricultural activities coexist with mainstream productivist agricultural holdings. The commercialisation of growing and wine processing in the boutique sector is examined, thirdly, in association with vigneron's participation in the field of technological and informational exchange. Survey data shows that the construction of new partnerships in this area are dressed increasingly at the regional scale and are argued ultimately to reflect broader regulatory shifts between the state and private sector.

3.3.1 Vineyard capitalisation

Vineyard capital start-up and development costs for small-scale growers approximate to \$35,000/ ha over the first three years and \$5-6,000/ ha to operate at full production⁷. The inherent, high degree of capitalisation is inferred by the observation that, given reasonable economies of scale, wine grape growing is profitable only after the 7-8 year pay-back point (Hedberg, 1999). A corollary here of the industry's advancing capitalisation is the conversion of two wine companies into large consumption-based enterprises. Entering the region by the Mitchell Highway from the west (see Map 3.1), the integrated tourist development of the Highland Heritage Estate becomes instantly apparent. It features a tasting and sales room, boutique winery and one of rural Australia's premier restaurants, as well as berry farm, gallery, wedding and conference facilities. The second leading integrated development in the region belongs to the Faculty of Rural Management of the University of Sydney. In addition to the construction of a commercial winery on property owned by the college, there is a high-quality restaurant, wine tasting room, gift shop, vineyard tour, function centre and small accommodation service designed for weekend visitors.

3.3.2 The arrival of the big boys

Secondly, the capitalisation of boutique operations is synchronous with the contemporary geographical concentration of medium and large-sized wine companies in Orange in recent years.

⁷ Data on vineyard capitalisation is derived from the grower survey conducted by the author as part of the present research (see Appendix 1). To gauge the degree of capital expenditure in the start-up of viticultural activity growers were asked in question three of the survey to state the sunk or fixed costs expended in their vineyards to date. Data on recurrent expenditure by Orange wine grape growers was sought in 14 categories, as the table in *Section C* of the grower survey indicates. These categories cover most of the recurrent costs involved with wine grape growing. Not all these expenditure categories were relevant for all growers. For instance, most growers who paid for a contractor to harvest their crop did not incur direct wages for harvesting.

The Orange hinterland is no longer a closed, local producer market. Local grower and winemaker ownership of vineyards in the Orange district has declined from ninety per cent in 1988 to approximately sixty per cent currently. The unique physical geographies of the wine region has encouraged a number of major inter-regional wine companies, Hunter-based ones especially, to establish vineyards in the region. This type of investor envisages long-term prospects within the cold climate wine industry. Medium and large sized wine companies also seek to diversify their vineyard portfolio in order to expand branding and sales initiatives.

Two medium-sized wine company newcomers are Rosemount and The Reynolds Wine Company. Before its acquisition in February 2001 by Southcorp, Rosemount Estate was Australia's fifth largest and most profitable wine producer. It has two wineries, at Denman in the Upper Hunter of NSW and at McLaren Vale in South Australia. Rosemount has vineyards located in most of Australia's premium wine regions, including Orange, where it established a 73ha vineyard in 1989.

Reynolds is another leading marquee⁸ brand which has established production facilities in Orange. The Hunter-Valley based company planted, in addition to the flagship 20ha vineyard at Yarraman in the Hunter, a 40ha vineyard in the Orange region in 1993. The aforementioned new Reynolds winery development serves to cement the strong grape sourcing ties Reynolds has built up with the region:

“The bulk of our fruit these days, about 70%, is from Orange, so it makes sense for us to reposition ourselves there. The Hunter Valley winery is now at maximum capacity and the new vineyard in the Orange district will enable the continued expansion of production” (Reynolds, 2000).

The penetration of Rosemount and Reynolds into the Orange district has served to entice others:

“The arrival of the big players has obliged the wine industry to take Orange seriously in a way that no boutique winemaker could have done”.

“When the big companies started to arrive people thought, ‘if they’re putting their time, effort and money into it, they’ve got confidence in the region’. As a result more companies have come to set up vineyards. It’s self-propelling”.

Two Lower Hunter wineries with their own Orange vineyards are Tamburlaine and Briar Ridge. Other companies produce an Orange regional wine from contract-grown Orange fruit, namely Glenguin with its Orange merlot and Capercaillie cabernet. Yarra Valley winemaker Domain Chandon buys Orange grapes for its sparkling wines.

The newest and largest investor to date however is the Australian owned Cabonne Limited. Since 1995 Cabonne has developed 869 hectares of premium quality wine grape vineyards in three cool climate locations in NSW, at Molong, Panuara and Jugiong. The

⁸A well and widely known wine market brand.

existing established vineyards are capable of producing at maturity the annual equivalent of one million cases of premium wine. A fourth location, Cudal in Cabonne Shire, has been programmed for development since 1999 (see Figure 3.1). Cabonne Limited's executive chairman, Mr Peter C. Lucas, states that most of its planted vineyards are in the Orange district owing to its reputation as a producer of quality red and white table wines (Cabonne Limited Prospectus, 2000). Cabonne Limited has become a landmark development for the future direction of the Orange wine industry: its production facilities have contributed A\$28 million of value adding to the local economy (Cummins, 1999).

Figure 3.1 Capital-intensive broadacre vineyard development at Cabonne Limited's estate and winery in Cudal, Cabonne Shire, Orange wine region.



The emergence of a small number of largely Australian-owned, productivist wine estates alongside the mushrooming of a small but capital-intensive segment of small vineyards can be linked to wider economic restructuring processes known as 'economic globalisation'. Corporate restructuring in the last few decades has seen the Australian wine industry shift from something approaching a cottage industry to a competitive consumer good market (Haughton and Browett, 1995). This restructuring process has been achieved largely through a massive concentration and centralisation of capital. Some industry analysts argue (Climo, 2001) the highly fragmented global wine industry is in fact way overdue for restructure. To demonstrate, in Orange in the six months from the start of September 2000 to the end of February 2001, the region's three largest wine producers made major acquisitions or entered significant partnerships. Cabonne Limited, the largest producer in Orange, bought Hunter Valley and Orange-based Reynolds Wine Company. Furthermore, Rosemount wine company was purchased by Southcorp, which is Australia's largest wine producer. In the wake of the globalisation of the wine industry, retail niches have emerged for specialty and boutique wines. The Orange district for example witnessed the opening of six new specialist wineries in the six months up to the end of 2000.

A cursory point is presented here. The large broadacre scale and capital-intensive nature of wine industry developments outlined in this section may help to overcome the

incorrect impression that post-productivism represents the end of a productivist philosophy in agriculture, when this is clearly not the case. Kim & Curry (1993) echo this sentiment, stressing that much of the literature on the fracturing of Fordist production systems has underestimated the persistence and continued viability of mass-production. Their case study of the spectacular rise of the chicken meat industry in the US demonstrates the perpetual importance of large firms' capital resources, knowledge and experience base, and well-established marketing networks, in facilitating significant productivity gains and product innovations. At the same time, it is acknowledged that large-scale corporate agri-food complexes are able to mass-produce 'post-Fordist' variety:

“As the technical means to manufacture efficiently differentiated products are developed (i.e. flexible production systems) they are employed not, as according to Piore and Sabel (1984) to re-invent craft production, but to mass produce variety” (Kim and Curry, 1993: 74).

Friedmann's (1993) case study of corporate involvement in the health food is noteworthy here. Acknowledgements of a new kind of global, production-consumption linkage in 'fresh' and 'green' produce (Le Heron and Roche, 1996), it is argued, are not indicative of the emergence of a 'post-Fordist regime'. Rather, they form a desire by large food corporations to 'window-dress' their existing structures and retain the basic structures of the Fordist agri-food complex.

In the present scenario, then, it could be argued that the PPT in its Orange context is more appropriately viewed as encompassing a number of changes that accompany a predominantly productivist agriculture rather than a wholesale shift in the sector towards a small-holder post-productivist agricultural system.

3.3.3 The formalisation and commercialisation of the boutique production arena

Third, and tied in with the influx of large scale wine companies into the Orange wine region in recent years, is the increasing formalisation and commercialisation of relations in boutique production, which are acting to reshape the whole Australian wine industry. This section, therefore, seeks to show how the nature of co-operative relationships in production aspects of Orange's boutique wine industry have evolved in its nearly twenty year history. These increasingly extend beyond informal support practices to a range of commercial contract relations and formalised local support systems. There are strong geographical repercussions here. The negotiation of new contract winery developments in the region will reconfigure existing production flows with vitibusiness players in neighbouring wine regions like Mudgee⁹ and the Hunter (see Map 1.1). Central here is the vogue whereby relations between growers and winemakers become specialised across the supply chain, with various forms of contract or quasi-contract

⁹ Mudgee itself is the third largest wine grape growing region in NSW in production volume terms. With 84 vineyards, it has earned recognition nationally and internationally as a top-class wine producing area.

flexibility in evidence. A total of eleven growers, from the pool of thirty-one survey-respondents, contractually arrange winemaking at one of the six handicraft wineries in the region. This includes the six winemakers who are the proprietors of the wineries. None of the winery-owners source grapes from other boutique, local growers.

Specialisation of winemaking activities, therefore, is generally a feature of boutique growers who do not own processing facilities, especially the newer ventures. These are situated in other NSW State wine regions. In this way, Orange's boutique vingerons are increasingly networking activity intra-state.

Twenty growers conduct vinification and bottling transactions with winemakers in the larger, Mudgee and Hunter wine regions. Upper Hunter contract-winemaker, John Hordern, is making an Orange wine for the Donnington vineyard. Jon Reynolds, of the Upper Hunter's Reynolds Yarraman, vinifies several Orange producers' grapes at that company's founding winery in Yarraman. Contract winemaker Simon Gilbert is also making wine for several local producers including Logan Wines. He recently relocated his vitibusiness from Muswellbrook in the Upper Hunter to Mudgee – partly to be nearer to Orange, according to Skinner (2000). It is important to recognise here the novelty of the spatial ties that Orange's smaller wine grape growers are forging with Mudgee's cool climate, boutique winemakers. Connected here is the traditional shortage of processing facilities in the Orange wine region. Growers agree that the main obstacle to the consolidation of the Orange wine industry is that the growth in grape plantings has outstripped the development of associated infrastructure such as winemaking facilities. One grower asserted:

“All the money has gone into planting and not processing. In reality any oversupply of wine grapes in Orange, like elsewhere in Australia, will only be short term while the infrastructure for processing the grapes comes on line”.

Figure 3.2 Cabonne Limited's new 20,000 tonne capacity winery at Cudal, Cabonne Shire.



At present, most Orange grape growers seek processing agreements at an inter-regional or intra-state scale. This is set to change on two fronts. First, it is hypothesised that boutique growers will increasingly arrange wine processing contracts with larger, Orange-based wine companies. The Reynolds' Wine Company is opening an Orange-based 1100 tonne capacity winery ready for vintage 2001. The linchpin of new processing areas is the development of a 20,000 tonne capacity winery by Cabonne Limited at Cudal in Cabonne Shire (see Figure 3.2).

This represents the first large-scale winery in the Tablelands region. It has a capacity twice the size of the Hunter's annual vintage. This will be used to process grapes from Cabonne's three existing cool climate NSW vineyards at 'Little Boomey', near Molong, 'Angullong', at Panuara and 'Wirilla' at Jugiong. In addition to making wines from their own grape harvest, the new Cudal-located Cabonne winery will provide a contract winemaking service to local growers. These developments pinpoint the second front of change. As new cost-competitive, processing facilities come on line in the Orange locale, existing boutique wine processing networks with Mudgee and the Hunter will shift to further focus the industry and its associated industries in Orange.

The formalisation of 'boutique' production relations is also evidenced by the host of secondary businesses that have set up in Orange and nearby towns to cater specifically for grape growers and winemakers. As well as contract winemaking services, there is a significant reliance on contract labour for pruning and spraying, harvesting contractors, viticultural and agronomic consultancies, barrel and fermenting tank suppliers, and wine cellaring services. The majority of these services are independent. Certain growers and winemakers are also establishing their own consultancy services in addition to their standard enterprise. Cargo Road Wines, for instance, provides a viticultural management service. Templer's Mill supplies a professional viticultural service to growers situated across the Central Ranges. It is arguable however that the variety of localised specialist contract relations supplements the flexibility in production boutique players exhibit in the first instance.

Fifty percent of grape growers rely on contract harvesting, and around one third rely on contractors for pruning. On a more widespread scale, it has already been established that, bar six winemakers who own their own means of wine production, seventy-five per cent of boutique growers hold grape crushing and winemaking contract arrangements. Specialist agronomic contract services noted here have increased largely as a result of the spread of labour-saving technologies, which have simultaneously reduced the need for a high all-year-round labour force, reduced seasonal peaks of labour demand and increased capital investment requirements (Haughton and Browett, 1995). In order to gain the advantages of reduced labour costs whilst avoiding high capital costs for machinery which is likely to be used for a limited time, grape growers have tended to rely on specialised contractors, or to hire out their own equipment. The proximity to a range of other producers also means that it is relatively easy to get cheap secondhand equipment, (vine cutters, trimmers and sprayers notably); a particular boon for small outfits.

3.4 Heard it through the grapevine?

Survey findings showed that technical assistance can be thought of in terms of custom and practice, and the tradition of helping others in rural industry. Informal modes of collaboration continue to exist alongside more formal support systems. The convergence of social practices hinged upon mutual assistance with concurrent ideologies of competitive enterprise is producing novel landscapes of production. The multifaceted organisation of production relations in the Orange boutique wine industry, caught as they are between informal and formal modes of support, is best exemplified by one sub-sector of production: technological exchange.

A key finding of the growers survey conducted for this study is a perceived dissatisfaction with institutional forms of knowledge, as advocated by governmental bodies like NSW Agriculture. NSW Agriculture is considered by a number of growers to be out of synch with the spatial nuances of the Orange grape growing environment. By implication, growers place emphasis on localised farming knowledges that have grown up amongst the vigneron community and which are adapted to the unique geological, and climatic environs of the Orange region. This evidence suggests two things. First, it contributes to a growing body of literature which is concerned with the constructed and contextual nature of knowledge production. Second, it points to the retracted role of the state in technological exchange, and the construction of relationships by vignerons with a constellation of new regulatory actors. The latter group, importantly, enact advisory and technical roles which are mediated and situated locally.

There is a strong consensus among growers and winemakers of the current inadequacy of NSW Agriculture extension services. Advice from this government body is perceived cynically by a number of growers:

“State government is useless. Reverse any advice from [NSW Agriculture] and then it may be useful”.

“NSW Agriculture is a non-event”.

A very slim proportion of growers acknowledged NSW Agriculture’s importance in an assisting capacity, recognising that its unpopularity among other growers may stem from the fact that its contributions are not always visible. Key activities are the stringent regulation of phylloxera and other vine diseases, water usage and irrigation quotas. These are, essentially, state wide issues, applied to viticultural regions across NSW in a coarsely systematic fashion.

Viticulturists are evidently negotiating informational linkages with other people and institutions. Importantly, they are providers of extension services geared to the local growing setting. Furthermore, they are not necessarily new. Co-operative relationships between local growers and winemakers are inferred as being essential from the outset to the existence and viability of the Orange boutique wine industry. Cooperation in the

locality is provided in an informal and formal capacity. The latter takes the form of the local producer group, known as the Orange Regional Vignerons Association (ORVA). Both are socially grounded in the local vigneron community.

Informally, producers farm their vineyards according to a set of community-bound knowledges. These have evolved from the constraints presented in cultivating a new viticultural region. The ‘colonisation’ of Orange was primed by a group of grape growers and winemakers who ruffled the prevailing dictum in Australia that only hot climates were suitable for wine grape production. As a group, they realised that cold climates had an important part to play in the Australian wine industry too. Initial plantings, by the Crawford family, the Doyle family of Bloodwood Wines, and the Fardell family at Borenore, were started in 1983. The harsh and high-risk practicalities of initial vine plantings made mutual support necessary:

“It was thought very risky due to Orange being cold and frosty yet it seemed logical among us [first growers] given wine grapes grow well in areas of pome and stonefruit production. We soon understood the reality that whilst winters are cold, summers are warm and the risk of frost is not as high as had been expected”.

This mode of collaboration continues to play a very significant role today. For growers,

“There is no culture of protecting one’s own pieces of knowledge. The sharing of problems – pruning techniques, disease control – is mainstay”.

And winemakers continually turn to each other for advice on their own wine, on its taste, and on the use of preservatives. Burden (1976, cited in Haughton and Browett, 1996) notices the operation of a similar ‘open-house’ system in the McLaren Vale:

“This is where almost anyone is welcome in cellars at any time and there are no secret formulae which must not be shared with others. ‘All for one and one for all’ could well have been their motto”.

In Orange, sharing of knowledge, bound by mutual trust, is an important social phenomenon. A supporting factor is the traditional absence (wavering now, it was shown earlier) of external ownership of wineries in the region. Boutique wine companies are owned by small and specialist wine makers, as opposed to professional investors or tax-minimisation operations.

The formal regulation of locally constructed knowledges began in 1986, when the first producer co-operative in the district, the Central Highland Grapegrowers Association was established. This evolved into the Orange Regional Vignerons Association in 1996. The transformation was in response to a federal statute requiring the geographical delimitation of Australia’s wine regions. ORVA has a current membership of sixty-six growers and vintners, which represents a critical majority of the local vigneron population. The association formally represents members on a wide range of issues in many forums, ranging from water management, taxation, to plant varieties.

Indeed, vignerons cite ORVA as the most commonly used source of technological innovation. The sharing of advances in winemaking technique and technology by ORVA is itself a highly pluralistic process, embracing agents other than fellow growers and vintners. Essential here is the supporting role played by the Orange-based Faculty of Rural Management, the University of Sydney:

“ORVA has played a strong role in providing technical advice on viticulture through its strong relationship with the Faculty of Rural Management, and its horticultural personnel” (ORVA Marketing Plan, 2000).

“Production knowledge is arranged by the [agricultural] college in order to handle regional issues of climate, aspect and variety”.

Apart from the University of Sydney in Orange, growers and winemakers positively acknowledge the information feedback from Charles Sturt University in Wagga Wagga, NSW. There is slim recognition that the viticultural research programmes at universities within the state with which growers engage are state-funded in part. This indicates the realignment of state involvement in new ways.

ORVA conducts technical sessions on a quarterly basis, and monthly field days at the Orange Faculty of Rural Management, addressing a range of subjects from vineyard management to marketing. Attendance, from a membership of sixty-six, stands at a minimum of 50% every meeting, which is rated excellent by industry benchmarks (ORVA, 2000). Another primary role that members think ORVA plays is being a disseminator of information pertaining to the education of growers in all aspects of viticulture:

“ORVA has been a great help to me because I have been able to get information from members that without, I would have been lost”.

The objective of ORVA’s role in these applications is to develop the standard of grapes and wine products produced in the region. This, it is apparent, is facilitated by ORVA’s espousal of precision farming techniques. Rather than the uniform treatment of vineyards with fertilisers and pesticides, an approach where growers should treat their vines ‘inch by inch’ is encouraged. Research and development initiatives are tailored to the specificities of the vineyard, bypassing previous government led policies which are largely unvaried across space.

Regulation of production knowledge in the ORVA case is a non-commercial commitment. For that proportion of growers who supply national brands, a more commercial stream of informational regulation is used. Joint grower-winery research efforts are undertaken which focus on fruit quality at the point of production. Detecting sub-standard fruit is a priority and, if necessary, rejecting it before it appears at a winery. Growers cite a wide range of grape quality parameters by which wineries expect them to

conform, including yield per hectare, Baume¹⁰, spray diaries, colour intensity, and vineyard assessments. Wineries also espouse technical advice on watering, pesticide use, and pruning, whilst continuing to insist on being consulted on issues such as when to harvest. The regulation of information flow between growers and processors by contractual means, despite the idea of being locked into a corporate purchasing unit that controls production practices, is evidently another verification of site-specific research and development applications.

Findings so far intimate that the process of information exchange is passing into the hands of wineries through contractual arrangements with growers, while non-commercial, regulatory organisations such as ORVA, continue in a very popular, supporting capacity. Importantly, the construction of farming programmes are organised and implemented at local, rural scales. It is important to note that the competitive organisation of information exchange in Orange correlates with the redrawing of the contours of regulation in Australian agriculture more widely. The evolving role of state support in agriculture will now be explored more fully.

3.4.1 The reshaping of public government's role in agricultural assistance

Before approaching this matter, it is useful to define some key terms in the arena of regulation. In agricultural matters, regulation is highly valued because of its traditional role as a mediator of interdependencies of production and consumption. The regulation arena embraces both public and private institutions. The term 'public institution' includes state departments such as NSW Agriculture and the Department of State and Regional Development. The role of mediation is achieved through 'real regulation' (Clark, 1992), that is the administrative manner, norms, procedures, style and logic by which the state, through public institutions, regulates society in general and economic activities in particular. There have been various shifts in layers of real regulation in recent times. In agricultural R&D, the role of real regulation is increasingly devalued in some segments. For example, recognition of the undesirable effects of agricultural intensification, (following state support of scientific and technological developments in agrochemicals and machinery) has led many farmers to question the role of 'expert', top-down knowledge (Monk, 1997). The waning of real regulation has been complemented by the addition of new layers of private sector, formal regulation. Supermarkets for instance now play an orchestrating role in issues of production and consumption for a number of food and drink products. Informal regulatory bodies, such as local farming groups, are mushrooming, in response, too.

Not wanting to purvey the idea that public regulation in Australian agriculture is defunct, it would be helpful to show how the role of the state is metamorphosing in response to challenges from other parties. Agricultural extension service provision in NSW is an appropriate example. Shifts in the business environment of agricultural industry suppliers and service providers have resulted in global effects on the agricultural and agribusiness sector. Companies in the Australian agri-food sector such as Elders, Westfarmers-Dagelty, SBS-IAMA, are fast becoming in their own right retailers of a wide range of

¹⁰ Sugar content of grape.

services. These include services that, in the past, were not considered the responsibility of the private sector. However, customer or client services, and business imperatives such as competitiveness and market share, have seen these companies embrace such services as core components of their business. These developments reflect a neoclassical logic:

“Just as reliance on government assistance and a culture of ‘they’ll look after us’ can lead to complacency and lowest common denominator outcomes, so too can reliance on centrally co-ordinated QA programmes administered by bureaucrats who think they know what is best for farmers” (ex-NFU President McGauchie, 1997).

To draw a supporting illustration from the current case study, there is a consensus that ‘quality assurance’ programmes should be directed by those with commercial investments at stake. ORVA maintains a position where standards of quality should be privately regulated, rather than adherence to a collective, regional benchmark. While there may be a role for regulatory bodies to promote the need for QA, most growers make clear that implementation must be made privately.

In this environment, more and more the role of government is to provide those services where there is market failure or where the private sector is unable or unwilling to meet the need (Sheridan, 1996). The formal adoption of a ‘national competition policy’ in 1995 by the Council of Australian Governments cemented these changes. It restricts the role of governments in business operations unless they are effectively competing in a truly private sector manner.

State powers in the arena of agricultural production have not been completely erased. NSW Agriculture has negotiated a continuation of selected existing services following extensive consultation with other state actors, such as industry associations, many companies, and the agricultural sector as a whole (NSW Agriculture, 1998). There remains for instance a clear demand and role for Government to maintain its unaligned, independent brokerage of information up and down the agricultural and agribusiness marketing chain (Sheridan, 1996). The 1997 President of the National Farmers’ Federation reinforced this sentiment, asserting that “the Government should continue to act as an effective two-way communicator between research and industry” (Sheridan, 1996:2).

3.4.2 Section summary: the changing role of public government down on the farm

In shaping new market opportunities, Orange’s winemakers are forging a multiplicity of new, informational partnerships in production matters, including other producers, (both informally, as a vigneron community, and formally, in the form of ORVA), winery field technicians, university departments, commodity suppliers and, in some cases, retailers. This corresponds with the concurrent shift in the provision of training, advice, information, market research and assistance in quality development away from the state, which has historically overseen these responsibilities.

Integral here is the detachment of growers and winemakers from essentialist conceptions of knowledge, represented in past policies of institutions such as NSW Agriculture, and an acceptance of 'other' knowledges, not least of which is the producer's her/ himself. In the Western world, such knowledges have for centuries been denied legitimate status. They have been referred to as folk theories, myths, or superstitions, and have been interpreted as subjective, unreliable, and as place and time specific. In recent years, however, most notably as a part of 'development' and environmental disputes, interest has turned from scientific and expert knowledges to those of so-called 'lay people', a shift which has highlighted the contentious nature of their relationship. This is in keeping with the current study, where growers and winemakers pitched overridingly cynical observations at the so-called 'expert' knowledges embodied in government bureaus and, in certain cases, the viticultural advisers and company representatives of productivist, corporate wineries, which some growers supply. The latter cast farmers as office managers rather than as cultivators and portray scientists and IT specialists instead of agronomists as increasingly important actors in the decision making process on the farm (Tsouvalis et al., 2000). By contrast, Orange's boutique growers and winemakers are, by virtue of their situated, specialist knowledge, in a position to self-administer standards of quality. These vineyard owners are dedicated to the consistent improvement of wine quality and style.

Lawrence et al. (1999) report a similar case where non-institutional forms of knowledge and experience provide a process for producers to reflect on their current management practices and to attempt to improve their local situation. They chart the pursuit of Local Best Practices (LBP) by a group of Queensland cotton cultivators, to indicate how particular producers are generating opportunities for self-improvement. Based on a 'farmer-first' or 'bottom-up' paradigm, the producer focus group was established in response to inadequacies in traditional, top-down, scientist-led policy, as well as a reduction in publicly-funded activities, and the inability of extension to correct severe environmental degradation.

The negotiated and shifting arena of information exchange by Orange's producers also fits into a class of farming studies (see Tsouvalis et al., 2000) which detail how agency tends to centre upon collective forms of action. For instance, the sharing of knowledge with other producers, informally and more formally via ORVA, of grape growing and winemaking practices is a common custom. The presence of harsh and struggling production requirements has necessitated the interweaving of close, strong support networks among growers and vintners, pioneers and newcomers alike.

Also, current informational and technological exchange programmes in production are, crucially, emphasising involvement at the point of production on the vineyard, often at scales of the vine row or under, in what could be described as 'inch by inch', precision farming. Farmers' knowledge systems are evidently the most flexible in these production matters. Site-specific R&D is coterminous with Orange's being a cool climate region, and its inherent edaphic, climatic and geological peculiarities.

3.5 Grape growing and winemaking cultures in Orange

In the preceding section, it became evident that informational exchange practices in grape growing and winemaking draw on a rooted tradition of informal, shared community problem solving practices. Expressions of co-operation were observed within the producer community, such as helping fellow producers at harvest time or the sharing of advice on grape growing and winemaking techniques. The thrust of this section is to continue the current vein of thinking concerning the social construction of production practices. In this section, small-scale viticulturists are shown to be useful in terms of thinking about how farming activities are associated with cultural choices involving consumption of the countryside. This embraces those farmers who have diversified into grape growing, and that cohort who are completely new to farming. To reiterate, from the pool of thirty-one growers surveyed, ten have diversified from other farming types, and seventeen form a band of newcomers to production.

Understanding small-scale farming as a cultural or lifestyle choice is not a new phenomenon. In the UK, calls for a culturally sensitive study of farming have been associated strongly with environmental and conservation issues. For example, Morris and Andrews (1997) highlight the need for an in-depth understanding of farmers' constructions of environmental meanings and their relationships with particular knowledges and practices. For Morris and Andrews (1997), 'culture' is imbued within farmers' minds as sets of meanings and values through which they interpret their environments, and which are reproduced through everyday experience and practice. McHenry (1998: 1039) remarks in a similar vogue that "facts, values and personal experiences are all bound up together so that nature and its conservation are social constructs". One is alerted then to the significance of the micro-sociology of individual actors in order to understand their individual constructions of nature (and their farming practices).

Before articulating how small-scale activity in Orange can be seen as threaded according to cultural and lifestyle decisions, a brief précis of those growers with no farming history is outlined. It is possible to suggest a picture of people being able to take on farming at a stage in their lives when they have been able to accumulate sufficient capital to afford what are expensive pieces of property. Most have purchased their land, with only a fraction renting land (although some combine owned and rented land). Another factor contributing to this picture is an age distribution skewed towards the middle-aged cohorts. A strong proponent of growth has been derived from inward investments by Sydney-based married couples or individuals: "[Orange has] seen people from Balmain and Gordon move to the area and buy small farms and we expect the trend to continue" (Cummins, 2000). Observations showed that these smaller newcomers to viticulture had experiences and social connections outside farming, were often better educated, and showed a disposition to accept and live on lower means.

Four themes emerged in response to asking growers the meanings they attach to vineyards, and viticultural and winemaking activity. The first theme, supporting earlier records of co-operative relationships in field-based knowledge and assistance, is

associated with ideas of community. It is felt that the local geographical area embraces 'like-minded people', who are 'friendly people with similar interests'. Growers talk of their being a part of 'the Orange vigneron community'. Furthermore, winemakers frequently refer to the image of an Orange winemaker as embedded in "local rural family traditions" and "pioneering roots within mountain wine country". Typical of this manner is Canobolas Smith winery, which was one of the first established wineries in the Orange region. It is a family owned and run winery, as the proprietor Murray Smith says himself, "we were new, small and individual". Pursuing a keenness for wine, and, deciding that he wanted to start work in the industry, a 4ha planting was established in 1986. This had been expanded to 12 hectares by 2000. The decision to establish production in Orange was the conclusion of months of exhaustive study and travelling in search of a desirable site: "I did a climate search, looking at Canberra up to Orange, and found that the rainfall distribution was really good here. [Orange has] the warmth to fully ripen cabernet. Orange has good soil, good climate and is an established fruit-growing district".

Tales and images of pioneering and collaboration between growers and winemakers are duplicated by other boutique, family owned wine companies. The ten hectare-based Bloodwood winery was the first commercial winery to be established in the district in 1983. Asked to comment on Orange's emergence as Australia's newest premium wine region, Bloodwood grower Stephen Doyle stressed "the human factor - the growing legacy of experience in cold climate winemaking hard-won elsewhere. [The pioneer] growers have turned the Orange district from a marginal area for wine production into a premium upland wine grape growing region". Brangayne wine company, similarly, boasts "[being] part of the Hoskins family for four generations, having produced fine fruit before being replanted with vines in 1994".

The second can be summarised as a concern with nature, covering both the supposed naturalness of farming and a desire to protect the natural environment. Several vignerons emphasise the importance of chemical residue free production. 'Indigo Ridge' wines are labeled 'cool climate – clean environment'. Indigo Ridge's biannual newsletter contains a section entitled "How Green Is My Vineyard". Other growers' comments included 'care of vines, plants and wildlife', 'commune with nature', along with several references to 'conservation' and 'sustainability'. Communal attitudes towards animals are indicative of that proportion of viticulturists who continue to farm pastorally. The blurring of animal nature and grape growing is, in one example, reflected tangibly in the landscape. At Indigo Ridge, a 36 ha Merino sheep farm is situated on the hill adjacent to the company's 4ha vineyard.

This concern with naturalness leads into a third theme, which is the quality of food and drink products, including wine. Growers link their consumption of food and wine into localised and extensive production systems as well as into wider conceptions of 'healthiness' and 'country living'. A significant proportion of vignerons are quick to proclaim the artisanal, quality-focussed and ecological merits of Orange wines, which themselves reflect growers' unwillingness to routinely maximise vine yields. Other comments such as 'knowing where our food comes from' and 'belief in the production of organic produce' belie wider consumer concerns with healthiness and safety. These

comments may also indicate a suspicion of ‘mass-produced’ food and drink products, where one may know what the products contain. A number of growers draw attention to health and quality issues associated with the more conventionally produced wines of large wineries.

References to ‘lifestyle’ are common, and while linked to what is suggested above, constitute a fourth theme. It is evident that a sizeable number of the smaller producers have been guided by lifestyle considerations. Don Hoskins, of Brangayne, is typical. While returns on investments in land and viticultural infrastructure are modest, the Hoskins family is compensated by quality of life returns:

“The single most important thing that led us into wine is the passion [my wife] and [my children] have for Brangayne, the mystique of the age-old industry with its multitude of classical allusions and the conviction that we can produce something which is a little bit special.”

Viticulture is presented as a ‘lifelong desire’ by one grower, for another ‘it was all I wanted to do from an early age’. Growers and winemakers are often pursuing their keenness for wine. Some are motivated by Orange’s reputation as a cool climate wine grape growing region in particular. Other farmers are interested in wine as a hobby, although with less zeal: ‘we were happy to buy a small farm, grow some grapes and sell them or even make our own wine’. They acknowledge they have been caught up in the ‘wine bug’ or ‘wine fever’ that periodically sweeps through Australia. Similarly, a number of growers explicitly link viticultural activity to rurality, making mention of ‘country living’ or ‘rural living’. Finally, for some growers, viticulture provides interest and relaxation after retirement.

In summary, smaller producers’ engagement with viticulture and winemaking can be conceptualised as part of a process of packaging and consuming particular parts of the countryside. This goes in unison with the process of producing (small parcels of) space for specific forms of rural commodity production.

3.6 Chapter summary: The growth of small-scale grape growing and winemaking production in Orange: signs of post-productivist farming in the NSW countryside?

This chapter has presented several findings. First, a slim proportion of vigneronns have struck new agricultural arrangements that accord with early definitions of post-productivism as aspects of structural adjustment. This does not resonate with wider documented trends where, for many, farming is in crisis as a result of low prices, reduced political support and a questioning of the place of farmers as ‘natural’ custodians and exclusive managers of the countryside. On the contrary, new viticultural and winemaking developments are largely capital intensive. This belies a wider trend to capitalise on new consumption patterns in wine. For nearly a decade now value-added margins have shown greatest buoyancy in the wine sector rather than more traditional activities like livestock and other areas of horticulture. The boutique wine industry was showed to be

progressively capitalising through the sharp growth of commercialised and formalised relations in production.

Evidence of consumer-oriented production indicates a wider requisite in this chapter to think about deep changes in the social construction of landscapes of production. In the production sub-field of information exchange, it was showed that farmers are emblazoning individual and communal knowledge cultures in the vineyards and wineries. It is also important to dwell upon that proportion of viticulturists and vintners who derive from non-farming backgrounds, thereby subjugating the traditionally strong importance of so-called 'expert' knowledges in the wine grape and other intensive horticultural industries. Counterurbanisation, and the opening up of new social spaces in rural areas, including urban-rural migrants, suggests the simultaneous need to solidify focus on cultural changes in the countryside. Themes of naturalness, lifestyle, community, and greener agriculture are farming ideals which survey data showed Orange's grape and wine farmers to be firmly upholding. To conclude, boutique grape and wine farming appears somewhat contradictory at this stage; symbolising a need to build competitive, consumer-g geared production on the one hand, whilst at the same time representing that growing trend of rural lifestyle adoption as a simultaneous rejection of modernity with a tendency to protest, for example, in relation to environmental damage (Halfacree, 1997).

4. Quality control: discourses of quality in grape growing and winemaking

In the preceding chapter, it was elucidated how Orange's boutique viticulturists and winemakers constitute a group of farmers moving into specialist production in order to capture new commercial possibilities. This fits with a wider trend where productive spaces in rural areas are being redefined in sequence with a range of socially constructed criteria. In the case of Orange's boutique wine industry, specific discourses of quality are being accentuated. The key problematic therefore is how the dynamic of quality is defined and deployed.

Understanding how quality discourses are socially and geographically embedded is important for explaining how Orange's boutique grape growers and winemakers are exercising control in production and, thereby, extracting added value. Survey findings combined with industry data show that the growth of well-ripened wine grapes at reasonable yields is underscoring perceptibly higher margins of return for growers in the Orange district than those for other NSW wine regions. For example, weighted average grape prices (\$/tonne) for Merlot grapes in the 1999 vintage were \$1253 per tonne, compared, with, say, \$1136 per tonne in Mudgee, \$1164 per tonne in Cowra, and \$988 per tonne in the Riverina (NSW Wine Industry Association, 2000). In the Hunter, average weighted prices for Merlot wine grapes in the 1999 vintage were significantly higher, at \$1789 per tonne (*ibid.*), yet given the well-established grape growing and winemaking history of this geographical area compared with the nascence of Orange as a wine region, this is to be expected. The Orange district's cultivation of premium grapes is in turn underscoring the production of distinctive, flavoursome wines at profitable yet competitive prices. The fifteen small-scale wine companies interviewed for the present study reported most current market growth to be in the premium (\$15-25/ bottle) and super premium (\$25-50) price range, which industry analysts (see Lockshin and Rasmussen (2000)) widely consider to be the two fastest expanding and most lucrative price-entry points in the otherwise currently saturated Australian wine market. The aim of this chapter is to understand how Orange's boutique wine industry is entrenching codes and practices of quality at all stages of agricultural production. In turn, it is useful to think about how these discourses constitute a premise whereby certain agents, specifically viticulturists and winemakers, are able to extract value-added components usually reserved for near-consumer agents in the food chain, like retailers.

This is analysed by recourse to Actor Network Theory (ANT), which I identify here as having three broad attractions for analysis of the current trend. First is the conception of a 'mode of ordering'. This concept emphasises how subjective, socially constructed discourses are paramount to the engagement and involvement of a variety of 'actors' within a 'network'. Modes of ordering represent a way of imputing coherences that "speak through, act on, and recursively organise the full range of social materials" (Law, 1994: 109). The focus of inquiry is not the agent, institution or process, but the social relationships through which these are constituted. For the current study, this provides a framework for identifying discourses or relationships of quality which are acting to order fine wine production patterns.

Second is the collective conception of social agency. Implicit here is the adoption of a post-structuralist conception of agency, where the focus is shifted from the power attributed to any one actor to the construction of actor-networks, or agency, by a multiplicity of agents. For the moment, the entrenchment of discourses of quality in Orange's vineyards and wineries is permitted by the collective agency of Orange's boutique wine industry.

Third, ANT accepts that social actors may be both human and non-human. In the current study, this allows for vines, grape and wine products, artisanal winemaking technology, and even geographical entities such as wine regions, to be incorporated into economic geographies of niche production in a way not permitted by conventional theories.

4.1 ANT and its Geographical Dimensions

Using this collection of ideas, I will identify the performance of a network in which Orange's small-scale grape farmers and winemakers are ordering the social arena of production by recourse to a prevalent mode of ordering of quality, with the intention of capturing new commercial opportunities. The objective of this first section, however, is to progress a broader discussion of ANT and its geographical dimensions, including those three tenets of ANT outlined above. Before presenting this outline, two complementary influences on the elaboration of the ANT critique will be highlighted, the one concerned with a disenchantment with structuralist accounts of societal change, and the other concerned with recognising space-time.

4.1.1 The cultural shift

The first relates to what Morris and Evans (1999) label the 'cultural shift', which has arched through human geography in approximately the past ten years. In geographical studies of post-productivist agriculture, the onus now concerns the embodied and situated social and cultural practices which constitute empirical changes in the economic composition of the countryside. It runs counter to those accounts of agricultural restructuring which "focus solely on an all-powerful vision of corporate actors who impose their will upon both farm producers and end consumers" (Coombes and Campbell, 1999: 307). Orthodox accounts treat the technological and economic interrelations between farming, agricultural input suppliers, scientific and research laboratories, and food processing, retailing and regulatory agencies, as abstracted presences or the product of some historically teleological process (Underhill, 1994, cited in Whatmore and Thorne, 1997).

Under the cultural turn, then, economic practices and agencies are conceived of not as some independent and determinant sphere of activity which selectively engages with 'other' spheres of society, governance or the environment, but as socially embedded and contingent throughout (Whatmore and Thorne, 1997). In political economy accounts of

agricultural change, for example, human agency is present but not central. The role of the farmer is incorporated into investigations of the strategies that individual farm households are adopting to cope with falling farm incomes and shifting policy. The overall effect is to consider farm families and households, rather than the farmer alone. The cultural shift seeks to understand farmers as the bearers of locally specific social knowledge, who actively shape the policy context rather than, as the political economy approach would have it, constitute mere receivers of policy. Much new scholarship concerns the cultural constructions of farmers, looking at their stewardship or conservationist responsibilities, their keeping of the pastoral myth, or now as others amongst largely non-farming rural populations (Lawrence and Gray, 2000; Yarwood & Evans, 1998). Recently, writers like Gray (1998) and McHenry (1998) have begun to engage more directly with worlds of meaning and knowledge within which farmers are embedded, giving potentially rich new understandings of farmer identities and farming lifeworlds. These ideas were evidenced in the preceding chapter via analysis of the production sub-field of information exchange. Farmers and winemakers were showed to be displaying artisanal and in-house knowledge cultures, operating parallel to, even eclipsing at times, so-called expert knowledges.

4.1.2 Recognising space-time

In the second case, critiques of structuralist ideas have informed theoretical efforts to deconstruct the geometric landscapes of political economy. By interpreting the world as a single grid-like surface, such landscapes make possible the encoding of general theoretical claims as omnipresent, universal rationalities. In contrast, post-structuralist approaches seek to dissolve the idea of social systems that operate independently of the activities of situated social actors. Social institutions, processes and knowledge are situated as always tentative, contextual and incomplete (Thrift, 1995, cited in Whatmore and Thorne, 1997).

Critics also point to the simultaneity of multiple, partial space-time configurations of social life. It is argued by Giddens (1984), for example, that seemingly macro-level phenomena like globalisation do not exist at a level apart from situated social practice. They in fact result from something he conceptualises as 'time-space distanciation'. He charts the 'disembedding' of social life through a process called 'system integration', whereby a series of societal transformations have permitted interaction between people who are absent in time or space¹¹. Historically, this is understood as time-space convergence or the expansion of interaction over space and its contraction over time. This 'disembedding' of spheres of social life does not mean that social life is no longer anchored in place. It still 'takes place' in the most obdurately physical of senses, but it becomes 'stretched' across variable spans of time and space.

¹¹ This has been made feasible by new forms of IT that have made communication across huge distances instant, which Latour (1987) terms immutable mobiles. These changes begun in the 1960s, when the global impact of mass telecommunications, electronic computerisation, cybernetic automation and rapid transformation first began to be experienced broadly around the world.

Consequently, post-structuralist thinking interprets economic geographies as open and dynamic networks. Crucially, these embody the co-operative actions of agents performing at a continuum of geographical scales. In the process, most rural geographers have made a break with the dated concept that processes of change operating in rural areas are somehow individualist and bounded-off from external forces. This approach was marshalled under locality studies, and dominated rural, and agricultural, geography through the first half of the 1980s. Processes of agrarian change, an ANT approach would insist, in fact overarch such parochial structures, and operate over ostensibly longer distance and time spans. Breaking from the 'old routine' has reverberated in related social science disciplines. In a critique akin to that etched in agricultural and rural geography, social anthropologists Gupta and Ferguson note "the power of topography to conceal the topography of power" (Gupta and Ferguson, 1992: 8). The authors are referring to the way traditional social anthropology has reified 'the village' as a bounded, sealed space, and has ignored the flows of social relations across boundaries. In other words, the particular constructions of the rural that rural studies deploy – the topographies of the rural – have obscured or concealed that which sustains them – the topographies of power.

4.2 Geographical aspects of ANT: four key tenets

Explicating the spatial dimensions of ANT entails the development of four canons of ANT theory. First is the concept of relationality. The spatial configuration of actor-networks differs from modernist accounts due to greater consideration of the complex and *relational nature of power* as it is extended through *social* networks. Latour and Law develop the respective notions of 'hybrid networks' and 'modes of ordering' to provide ways of reconceptualising power relations in space from globally uniform systems and processes spreading over and colonising places to socially contested, spatially situated sites and actants linked together into actor-networks.

In this fashion, the key question for understanding socio-spatial agricultural or other patterns becomes not that of scale, encoded in categorical distinction between 'the local', 'the regional', and 'the global', but of connectivity marking lines of flow of varying length and which transgress these categories. Relations are no longer thought of as metric. Space is folded by social networks. Relations forged in space, Mol and Law (1995) perceive, are better thought of as networks wherein the network brings together two or more locations that may be far away from each other on a regional map:

"Proximity has...to do with...the network elements and the way they hang together" (Mol and Law, 1995: 649).

Formulating inquiry in this way refuses the privileged, automatic association between, say, large-scale agribusinesses or corporate wineries, (social institutions traditionally esteemed powerful), and evolving niche viticultural geographies of production, trade and consumption. By implication, the idea of relationality thwarts the pervasive mapping of the conventional sociological binaries of 'macro-micro' and 'structure-agency' onto that of the 'global-local'.

This transcends a tendency in political economy accounts to proclaim the emergence of new, spatially-coherent agro-food patterns in the lee of what are otherwise socially under-representative (small, localised or fleeting) empirical trends. For example, food regime theorists Le Heron and Roche (1996) article Campbell and Coombes' research into New Zealand's role in global trading in organic foods as evidence to support their contention that a new style of production-consumption relationship is being forged in countries like New Zealand. Le Heron and Roche conclude that the building of flexible supply systems of 'fresh' and 'green' products for lucrative markets in the first world may be indicative of a new kind of global phenomenon or emergent third food regime.

ANT, on the other hand, understands the size, or scale, of such patternings as a product of network lengthening, not of some special properties peculiar to 'global' or 'core' actors. These generic spaces, according to Latour, enshrine a geometric vocabulary concerned with the geography of surfaces. The unilinearity encoded in their relationship makes less sense in a topologic vocabulary concerned with the geography of social flows. In terms of ANT, geographical phenomena are best understood as "by nature neither local nor global, but only more or less long and more or less connected" (Latour, 1993: 122). Thus, even as they are global they are partial, embracing surfaces without covering them, however long their reach. Latour (1993) uses the example of technological networks to illustrate this principle of *partiality*:

"Technological networks, as the name suggests, are nets thrown over spaces, and they retain only a few scattered elements of those spaces. They are connected lines, not surfaces. They are by no means comprehensive, global or systematic, even though they embrace surfaces without covering them, and extend a very long way" (Latour, 1993: 118).

Returning to the case of New Zealand, Campbell and Coombes critique Le Heron and Roche's deployment of their research under the food regime position because "it makes the transition from a few cases in New Zealand to the concept of a food regime rather rapidly" (1999: 306). In turn, they draw attention to the spatial and temporal capriciousness of 'new' food production sectors such as 'fresh' and 'green' produce exporting. Similarly, Australia's new and emerging animal enterprises, worth more than A\$160 million a year, have an unenviable reputation for startling peaks and equally depressing troughs (RIRDC, 1999). These empirical facts curry favour to arguments, influenced by ANT, that deny the proposition of a global regime of food relations able to colonise surfaces at an increasingly global scale and stable over a particular historical period.

This section has established that new economic geographies are understood by ANT as invested in relations not entities and in which power only exists when it is exercised. The construction of a network of actors is hence necessary for any desired outcome to be achieved. It is important to ask the n how networks are extended through space or, what Latour (1993) calls, network lengthening. The answer advanced by ANT is the mobilisation of larger numbers and more intricately interwoven agents. Important is the

question of how the modes of ordering which bind these agents are stabilised in time and space or, in ANT terms, how they are made durable. Equally important is the need to outline the corollaries of collectivity and hybridity and the way in which they can lengthen and strengthen networks across geographical space.

4.2.1 Durability

Law (1994) formulates the notion of mode of ordering to show how networks are strengthened or made durable in space. A mode of ordering, to reiterate, examines the ways in which groupings or networks of actors are constituted via subscription to a common discourse or rationality.

Modes of ordering can be both discursive, ‘ways of telling about the world...what used to be, or what ought to happen’, and material, ‘acted out and embodied in a concrete, non-verbal manner in a network’ (Law, 1994: 20). Social practices do not exist in and of themselves. They are outcomes, generative effects of networks of a multiplicity of social agents bound by a common rationality. This device represents a means of ordering those objects of analysis that might usefully be used as foci for generalisation without backtracking to modernist tendencies that construct heroic accounts of powerful actors, structures and processes.

For example, Whatmore and Thorne (1997), in their study of alternative production-consumption practices performed through fair trade coffee, observe the mobilisation of a mode of ordering framed by fairness or connectivity. A discourse of ‘connectivity’, it is argued, orders a set of non-hierarchical relationships that link producers, co-operatives, fair trade organisations and consumers in a globally distanced alternative trade network. The spatial and temporal extension of the fair trade network, therefore, contrasts dramatically with the geographical reach of neoclassical coffee networks which, underpinned by the totalising logic of capital accumulation, spread over and colonise spaces. These kinds of rationality are normally pegged on to agri-food transnational corporations (TNCs) of the Astro-Zeneca, Monsanto and Nestle ilk.

The second way in which modes of ordering are strengthened is the way in which such relationships or discourses are represented or constructed as the object of network activities. In Whatmore and Thorne’s example, the patterning of social, and sometimes environmental, practices in particular times and places becomes integral to the business of network sustenance. In the present study, too, the socially constructed criterion of ‘quality’ is effected as a valuable tool in the struggle to differentiate wine products and construct new economic opportunities through value adding.

Modes of ordering therefore strengthen network activities across space by necessitating strong fabrics of social organisation at all points in the network. Durability is also enhanced where the mode of ordering is constructed as the premise for achieving a network goal.

4.2.2 Collectivity

Integral to the process of network building and modes of ordering is the *collective* conception of social agency, where the strength of networks or discourses is woven between the capacities and practices of actors performing *in relation* or *together*.

The process of collective social agency is derived from a concept proposed by Callon called ‘translation’. This process is demonstrated in Callon (1986a) as a sequence of four ‘moments’: problematisation, intressement, enrolment, and mobilisation. Every translation may not necessarily involve all four moments, and the moments may in reality overlap (Woods, 1997). In the first stage, problematisation, the potential translator defines other entities, their goals and problems in a manner which presents the translator’s objective as the solution to the other entities’ problems. The process continues with intressement, whereby the other entities are attracted into the project by blocking other possible alignments; and enrolment, where the roles of the actors are defined and distributed. Mobilisation is the stage at which the representation is enacted.

For those instances where the mode of ordering is additionally effected as the network, collectivity (enacted by the process of translation) becomes key. In unison, Lowe (1995) states that if actors in space are to progress to a position of changing economic conditions, these actor spaces need to become aligned with one another. In turn, actors in discrete situations become bound into wider sets of relations which then alter the nature of individual actor spaces in accordance with the needs of the network as a whole (Law, 1992). In his founding study of three scientists attempting to construct and disseminate scientific knowledge about scallops in St Brieuc Bay in France, Callon (1986a) demonstrated how network objectives or ‘programmes’ require the synchronisation of *all* actor spaces within a network. Essential to the collapse of the scientists’ project, according to Callon, was the dissension of the other actors within the network. Similar is the significance of the ‘documents, devices and drilled people’ in Law’s Portuguese study, and the way in which they hold each other in position to effect navigational and trading goals:

“the right documents, the right devices, the right people properly drilled – put together they would create a structured envelope for one another that ensured their durability and fidelity” (Law, 1986: 254).

Thus, networks understand social agency as collective. This supports that first canon of ANT outlined earlier, that power or agency is associative, invested not in entities but in relations.

4.2.3 Hybridity

Focusing on how network relations in space require the weaving of the actions and competences of multiple agents directs analytical attention towards the recognition of new facets of social life, thereby forcing a challenging shift in the horizons of social research. Law notes in relation to his example of Portuguese efforts to expand the reach of European trade in the fifteenth and sixteenth centuries by capturing the spice route to India:

“If these attempts at long-distance control are to be understood then it is not only necessary to develop a form of analysis capable of handling the social, the technological, the natural and the rest with equal facility, though this is essential. It is also necessary that the approach should be capable of making sense of the way in which these are fitted together (Law, 1986: 235)”.

Hence, it becomes necessary instantly to talk of mediators or actants other than people; that is, other than human actors on whom the whole compass of conventional theories of social agency (including other social network theories) are built (Whatmore and Thorne, 1997). ANT problematises the dichotomy between humans and non-humans, and with it, the attribution of agency to humans alone. Admittedly, people in certain contexts act as important go-betweens, mobile agents weaving connections between distant points in the network; for example, the sailors in Law’s Portuguese case study or the managerial elites of transnational corporate business today.

Yet, according to ANT, there is a wealth of other agents, technological and ‘natural’, mobilised in the performance of social networks. These are objects which encode and stabilise particular socio-technological capacities and sustain patterns of connection that allow us to pass with continuity not only across geographical space, but also from the human to the non-human. The more they have proliferated in everyday life the more, it seems, these ‘objects’ have been effaced in social theory, leaving us awed by the subsequently fantastic properties of social entities like TNCs (Whatmore and Thorne, 1997). At the same time that modernist social theory draws clear ontological distinctions between humans and non-humans, the project of modernity is in fact functional upon “new types of beings, hybrids of nature and culture” (Latour, 1993: 118). Thus, networks are composed of a heterogenous array of actants including humans, nature, animals, organisations, machines and technology. The human self as the focus of strategic intention is decentred and agency conceptualised as an emergent property of relationships within a network involving, potentially, both humans and non-humans (Callon, 1991).

To demonstrate, in his Portuguese case study, Law shows how a group of agents are adjoined as representatives of network spatial extension, including documents and devices as well as people crafted in particular ways. A scientific document called the ‘Regimento’, for example, enshrined new instructions for navigating by astral means. This enabled the successful and regular passage of trading ships through the South Atlantic and Southern Indian Oceans, thereby transcending the established boundaries of North European travel. Other enabling devices included the ‘carreira’, a ship built for

transporting cargo and avoiding attack, and ‘a kind of simplified black box’, the astrolabe.

In another example of this approach, Busch and Juska (1997) follow the Canadian canola oil network. They highlight the participating roles of erucic acid, mice, adrenal cholesterol and the rape plant, (together with the Defence Board, the National Research Council, Agriculture Canada and the scientists they employed), in the transformation of rapeseed from a minor source of industrial lubricants to the foundation of a major edible oil industry. Similarly, in following the Brazilian soybean, de Sousa and Busch (1998) explore the role of the soybean, technologies of soybean production, state export, credit, exchange rate and pricing policies, farmer co-operatives, and farmer management skills in the development of soybean as a viable tropical crop. In both examples, the successful enrolment of non-humans – in particular, plant species with markedly modified characteristics – is argued to be fundamental to the extension of the network.

It is this point, the notions of agency as a peculiarly human capacity, which represents the greatest tension between ANT and conventional theories of social agency. How then can one grasp the active properties of non-human agents in the geographical lengthening of networks? As radical as it may first appear, this problematisation of agency is in fact consistent with, again, the broad trend towards relational theories of power within contemporary sociology than either individualised notions of agency, or their converse in structuralist or functionalist erasures of agency. Both Giddens (1984) and Foucault (1986), for example, articulate relational theories in which power ceases to be a ‘thing’ that may be possessed, accumulated and used. Again, within ANT, power is seen as a relational effect of interactions between actants (Law, 1994). The process of achieving a programme is performed utilising human and non-human, material and non-material resources, in recognition that “left to their own devices human actions and words do not spread very far at all” (Law, 1994: 24).

4.2.4 ANT's usefulness for the current study

In outlining an alternative understanding of how economic geographies are constructed across space, the four main points that I take from actor-network theory are that networks, due to the adoption of a post-structuralist concept of power, are a *relational* performance of multiple social practices and competences. Second, inhabitation of numerous nodes and sites is adjoined, and strengthened (or made *durable*), by a *mode of ordering*. Third, they are *collective*, where the interests of multiple social agents are aligned and mobilised as part of that network. Fourth, they are *hybrid*. The shift in thinking on the nature of power in ANT abandons all a priori distinctions between the natural and the social (Woods, 1997).

4.3 The researcher's story

“[A mode of ordering's] character is contingent and, in part, a matter to be determined empirically” (Law, 1994: 10).

In order to assess the proposition that small-scale or boutique wine production patterns in Orange are underlain by multiple modes of ordering, or relationships, pertaining to quality, and in keeping with Law's precept, grape growers and winemakers were asked what were the most important factors ensuring the 'quality' of wine. They were asked to select the most important indicators of quality from a list of seven possible indicators (see Table 4.1 and Question 6 in Appendix 1).

Table 4.1 Possible 'indicators' of quality of wine

1. Product specification
2. Raw materials
3. Customer perception
4. Premium prices
5. Certification/ quality mark
6. Presentation/ promotion
7. Traceability of inputs

Results indicate that there is no one definitive discourse of 'quality' underpinning boutique wine production. This accords with the aim of the researcher to remain sensitive to the presence of a plurality of discourses rather than to singular hegemonic patterns. Rather, survey data showed that growers and winemakers define four different 'modes of ordering' of 'quality', all nevertheless seeking to construct relationships of quality across the wine network and, ultimately, extract a recursive pecuniary effect. A few issues need to be kept in mind while examining these four modes of ordering.

These relationships of quality comprise the premise for profitable niche agricultural production, a key tangent of the PPT. This would imply that modes of ordering threading boutique wine networks, given that these discourses display a capacity to interweave an expanding number of social actants, are more durable than productivist agricultural discourses. The latter are represented by large-scale national wine companies like Cabonne Limited, and Hunter-based Rosemount and Reynolds Yarraman, who have invested in the Orange wine region in recent years. Admittedly, these networks are folded by relationships of quality, too. It is necessary then to grasp how the boutique encoding and construction of each alliance of 'quality' is performed differently from productivist strategies to provide a mode of strengthening (or making durable) that is analytically discernible.¹²

¹² In order to infer the degree to which boutique discourses of quality entrench a network mode of strengthening that is analytically distinctive, productivist wine producers were asked the same question put to smaller players (see Table 4.1 or Question 6 in Appendix 1).

As connoted in section 4.2, the corollaries of collectivity and hybridity are integral to the strengthening or making durable of modes of ordering. The researcher must become alert to the way in which actants in boutique wine networks align their own conceptions, and demands in relation to each mode of ordering of quality. Similarly, in productivist wine networks, the relative synchronisation of discourses of production must be gauged. The object of inquiry concerns how discourses are contested and the way in which they interact, change and, even, disappear. Networks operating according to different discourses can:

“overlap in space-time; sometimes occupying separate spaces and establishing discrete lines of connection; and sometimes explicitly oriented towards challenging their modes of ordering” (Whatmore and Thorne, 1997: 295).

The mode of ordering of ‘connectivity’ that underscores Whatmore and Thorne’s fair trade coffee network, for example, remains tenuous as it brushes up against, and is potentially undermined by, the cost-minimising, self-interested mode of ordering of the conventional networks it challenges.

Second, thinking in terms of hybridity, the researcher must be discerning of how the observed boutique modes of ordering, where the construction of wine quality is paramount, lends itself to the empowerment of hitherto overlooked and marginalised, human and non-human actants. Enrollment of these actants, it is conjectured, provides an important mode of strengthening that is analytically discernible from productivist networks. The object of inquiry here is on how discourses are performed, embodied and told in different materials – not simply in terms of language.

Failure to consider seriously the influence of non-human actants on agri-food networks, (the ontological shift that is intrinsic to ANT) is where past attempts at incorporating ANT into human geography have failed. Network studies draw less on the imperative to decentre the human self as the focus of strategic intention than they do on the imperative to examine the ways in which power is translated across space (Lockie and Kitto, 2000). De Sousa and Busch’s (1998) forays into a post-modern world of agri-food production, by way of their case study of the Brazilian soybean and its constitution as a viable tropical crop, are arguably undone by their human centredness. It is ill defined how the enrolment of non-humans advances beyond consideration of the role of science production and application as distinctly social activities. Furthermore, they reify corporate actors such as ‘the state’ and ‘TNCs’. In this way, their account mimics the sharp dualism in society and nature relations underscored by modernist theory. The perceived lack of engagement by geographers with ANT’s conceptualisation of non-human nature as relational entity with active properties explains why a potentially infinite number of agricultural geographies are being thwarted. This includes animals, which by tradition have been ignored in geography. Animals, following the same cue, are seen as homogenous items of mass production, broad types within policy mechanisms or at best ‘quality products’ within the food production system (Yarwood and Evans, 1998).

4.3.1 Hot on the growers' heels: following the actor in the network

Gauging the ways in which 'quality' modes of ordering are performed by means of collectivity and hybridity, necessitates close examination of the social and economic practices of actors in their context of action, or actor space. This involves assembling an understanding of knowledge, resources, materials, and technologies which actors utilise in order to progress actions and strategies. For the current study, this methodological tactic poses the advantage of helping to overcome the construction of a story of the boutique-hybrid wine network of Orange according to certain privileged perspectives.

The present study traces the formation of the boutique network primarily from the point of view of thirty-one grape growers and fifteen wine companies. McManus (2000: 9) observes:

"Qualifications about ANT include the need to acknowledge that when and where the author enters the network is important, and the act of writing necessarily mediates the ability of actants to speak for themselves".

In the present study, therefore, a story of how boutique producers are constructing a quality-flavoured network is apparent, rather than a story of how relationships of quality serendipitously unfurl by virtue of the coming together of a diverse array of beings, things, times and spaces.

The palpable fixation with the role of the producer is by no means at the expense of other actors operating within the network. Interviews were also conducted with elected committee members of the local, Orange district vigneron production co-operative (ORVA), representatives from Orange City, Cabonne and Blayney Shire Councils, and their respective tourism bureaux, Orange City residents, NSW Agriculture and the NSW Department of State and Regional Developments. Galvanising consumer opinion and establishing historical and corporate contexts has been assisted additionally by industry and trade journal reports. The actors outlined here form part of a respondent-pool which, to retell, includes 31 grape growers and 15 wine companies.

4.4 Coolness, sunshine, rain, soil, 'jolly good grapes' and grapecrushers: issues of hybridity

'Quality of raw materials', defined as the physical geographical attributes of the wine-grape growing region, emerges from survey interviews with growers and winemakers as a crucial ingredient of a wine's quality, by both boutique and productivist wine producers. It is moreover the 'uniqueness' of the local region's environmental qualities that producers perceive to underscore the 'quality' of wine. This is a decisive finding. It indicates the shared sensitivity among growers and oenologists, from handicraft and mainstream networks, alike to interactions between human and non-human actants.

Four individual environmental attributes were identified by farmers as bearing crucially on 'quality' of wine. First, Orange is a cold climate wine grape-growing region. Vineyards in this region range from 600m to 1050m with most production currently occurring between 800m and 900m. This makes the Orange appellation the highest viticultural region in Australia. Coolness is achieved through altitude – this contrasts with those wine-grape growing regions of the Northern Hemisphere, such as Germany and Canada, where cool temperatures are imparted via latitude. The cool climate importantly yields an extended ripening season¹³ with harvest between mid March and early May. In general, grapes from the Orange region are harvested some 2-3 weeks after Cowra, 1-2 weeks after Mudgee, and 5-6 weeks after the Hunter Valley. Second, it has the sunniest cool climate in Australian viticulture (Gladstone, 1994, cited in ORVA, 1997). The distance from the coast, and the Great Dividing Range which separates it from the coast, ensures that the region has minimal cloud cover during the summer. One grower explains it as such:

“Whilst the sunshine assists colour and flavour development, the coolness of the region avoids the problems of excessive heat normally associated with this level of sunshine”.

Third is the unique local rainfall pattern which reflects continental and altitudinal factors. Rainfall is most reliable in late winter and spring, providing a robust start to the season. Fourth is the area's distinguished geology and soils. The region is dominated by Mount Canobolas - an extinct volcano of 1396m elevation. Past volcanic activity has yielded basaltic soils with high fertility. They promote strong vine vigour and are perceived to produce grapes and wine of distinct fruit flavours and colour.

However the role of non-human entities in discourses of quality is more complicated. This is suggested by the fact that producers commonly deem 'product specification', defined as those specialty food and drink products (SFDPs) made using skilled production methods, as a leading indicator of grape and wine quality. Here, debate is repositioned to consider the ways whereby the physical environment becomes malleable to humans. However, it emerges that while mainstream networks profess little for the physical environment compared with that reserved for human intervention in the form of winemaking, boutique producer networks acknowledge that a wine's quality is endowed crucially through the physical interface.

Boutique wine producers agree that non-human factors in the form of environmental influences in the vineyard figure crucially in discourses of wine 'quality'. The prevailing sentiment among Orange's boutique viticulturists is that 'wine is made in the vineyard'. Richard Smart, a contract viticulturist operating in Orange, remarks that “for the majority of contemporary wine styles, wine quality is affected more by vineyard than winery practices”. Other growers remark in a similar fashion:

“Wine quality is more dependent on processes, which happen before rather than after crushing of the grapes”.

¹³ The extended ripening period, and its absence of extreme heat conditions in Orange, allows grapes to ripen steadily without interruption to sugar and colour accumulation.

“The principal factor affecting wine quality is the composition of the grapes. Winery practice has much less effect on wine quality, unless the fruit is of poor quality”.

“Good management would not use the youngest berries. Once the Orange wine industry moves towards a sufficient level of maturity, practices should become more akin to growers in the Bordeaux [region of France]. They would not use berries that are anything less than ten years old”.

From a wine quality viewpoint, growers deem viticulture as a practice of creation; oenology¹⁴ is a practice of conservation. They acknowledge that the reverse may have been true, say, forty years ago. Then, oenologists were often the only trained members of the production team and often they had supervision responsibilities for vineyards as well. In those days, moreover, winery practice had major effects on wine quality, especially with the introduction of refrigeration and stainless steel and associated sanitisation. As another grower remarked:

“Nowadays, with most wineries around the world adequately equipped, the realisation is growing that winery manipulation has lesser effect on wine quality than does the vineyard manipulation”.

Growers thus point to a plethora of vineyard management decisions made in conjunction with the peculiarities of the local physical environment, which they knew as most affecting wine quality:

- Choice of the variety, clone and rootstock in the vineyard
- Selection of vineyard site including aspect, soil and climate
- The effects of the vineyard climate
- Proper farming techniques, including canopy, trellis and water management
- Row and vine spacing
- Yield and quality management, an acceptance that grape quality differs across vintages
- The importance of selecting harvest date

One boutique grower neatly summarised this majority point-of-view: “oenologists cannot produce good wine from poor grapes”.

Survey findings showed moreover that boutique producers wield an inherent sensitivity to the fact that the sturdy quality of Orange wine grapes, cultivated as they are at high altitude, constitutes the premise whereby a plethora of actors construct economic value, in the form of a boutique wine network. Two growers make this link explicit:

“The grapes are strong. They are grown at an altitude between 600m and 1050m. Conditions are cold, with thin sunlight and long winter frosts. Space is at a rising premium. Conditions can be cramped. It can be very dry, too. Humidity is low. To

¹⁴ The responsibility for wine making is divided between the viticulturist (responsible for supervising the vineyard processes) and the oenologist, responsible for supervising the winery process.

survive these kinds of physical conditions, you have to be strong. Which, by coincidence, also makes you attractive taste-wise”.

“The quality factor derives from grapes that never say die. In fact, being grapes, they never say anything at all. If they could talk, they may tell stories of suffering in the inhospitable vineyards of Orange”.

By contrast, the discourses of large wine networks downplay physical geographical factors in their construction of wine quality discourses. This reflects an attached precedence to the human social practice of wine making. In turn, winery practice becomes more important than viticultural practice in affecting wine quality. In this way, not only do they render non-human actants in the form of the natural environment and the grape vintage as rather passive, they also eschew the part played by those human actors operating closest to the physical interface, namely viticultural management.

However, by acknowledging wine processing as a key indicator of quality, larger wine companies attribute agency to an alternative array of non-human actants, chiefly technological agents. Those raised through the survey were:

- Choice of yeast strain in the cellar
- Choice of fermentation vessels, or perhaps forest source of barrels
- Crushing method, fermentation temperature and duration
- Effect of wild yeasts in fermentation or bacterial diseases on wine, (compared with say control of fungal diseases of vines and grapes).

Noteworthy here is the development of conjoined human and technological techniques in blending to produce quality table wines. Blending produces wines of familiar taste and consistent quality from one vintage to another. ‘Consistency’ and ‘reliability’ are important customer-loyalty building devices for medium and large-sized producers. This contrasts with, say, French (and boutique Orange) wine making discourses which accept that the qualities of a wine should vary from one season to the next (O’Neill, 2000).

Thus, while natural non-human actants form a mere cipher for human intentionality and practice, technological non-human actants are embraced by productivist wine networks as an important mode of strengthening of quality. Technology, in the form of winemaking equipment, is similarly deemed an important mode of strengthening in smaller production networks. In turn, it can be viewed as seminal to the growth in profile of wines from Orange’s boutique vineyards. There are six, small in-house local wineries, at which eleven of the thirty-one grower surveyed have their grapes vinified. Ibis Wines owns the smallest of the small local wineries, with a processing capacity of six tonnes. The winery owner describes the vinification process as follows:

“the grapes are all hand picked and wines are made using small-scale equipment; a simple crusher, open fermenters and a basket press”.

Canobolas Smith Wines owns the largest of the small wineries, with a capacity of forty tonnes. Its proprietor makes clear how winemaking procedures are embedded in local socio-agricultural practice. The imperative to ameliorate the centrality of humans in performing the network goal is also highlighted:

“Cropping levels are moderate, and the fruit is all hand-picked into crates, ensuring gentle handling. I tip every crate into the press, so I can pick out anything I don’t like. Top quality French oak is always used for barrelling. Perceptions of winemaking techniques are important for both the trade and the consumers. Traditional processing practices and facilities create a certain image and add value beyond their actual skill”.

4.4.1 Section summary: hybrid-boutique networks vs. human-centred productivist wine networks

There are several points needing rehearsal here. First, interview results evidenced that discourses of ‘quality’ are highly contestable in the production chain. Perspectives on what quality is and how it may be measured vary considerably between grape growers and oenologists, and different network types. As noted by Ventura and van der Meulen (1994: 129), “any definition of quality is determined by the many-faceted interactions of all those involved in the realisation and appreciation of the final product”.

This leads on to a second concern. The negotiated character of the concept of quality means that there is potential for powerful actors in the wine production chain to appropriate their definition of ‘quality’ and impose it on others. In larger wine companies, it was observed that viticulturists must comply with stringent, corporate quality standards in size, colour, texture, and yield, amongst others things. Grape-growers at this scale of operation indeed find it galling that oenologists are given the majority share of the credit for wine quality, not the viticulturist. By contrast, boutique farmers actively resist the encroachment of corporate involvement in all stages of production. They are more likely to personally employ costly ‘hands-on’ viticulture and a more perfectionist approach in the winery. Viticultural and winemaking techniques are experimental, while demonstrating an uncompromising commitment to continuous quality improvement.

A third issue is the documented performance of non-human actants in boutique wine actor-networks. The material enrolment of non-humans – in particular, the environmental peculiarities of the Orange wine region and the grapes themselves – is fundamental to the durability of the network. At a closer level of inspection, it is clear that the construction of quality-led associations between economic actors (the farmers) and non-humans is the premise by which control is exercised and value extracted. Growers demonstrate how the quality of non-human actants, chiefly the grape vintage, yields critical results for the fortunes of the wine commodity network. A low yielding or substandard vintage is often caused by capricious weather patterns. The 1999 NSW wine grape vintage demonstrates

this point. Initially, a wet La Nina¹⁵ summer brought powdery mildew problems and threatened to decimate the vintage. When there is a poor vintage, losses are incurred along the network. The grape grower is perhaps the most at risk, for a winemaker can always source elsewhere. Grower responses in the current survey frequently referred to a vintage's standard, therefore, and its reverberations in family farm kitchens, company boardrooms and bank managers' offices, the latter especially important given the unprecedented borrowings associated with the industry expansion of recent years.

For corporate wine networks, on the other hand, when discussing how non-human aspects of quality are being formulated in relation to wine commodities, nature appears as a unexplored category – save the year of vintage – which is marshalled solely by human actors, namely oenologists. 'Quality of raw materials' does not assume agency independently – only when coerced by 'product specification'. Winery practices are believed to figure more in influencing wine quality when compared with vineyard management practices at this scale of operation. The perceived emphasis on oenological procedures by medium and large-sized wine companies simultaneously engenders the attribution of agency to an alternative array of non-human actants, chiefly yeast strains, crushing and fermentation technology. It is ill defined however how the enrolment of non-humans advances beyond oenologists' vague consideration of winemaking technologies and procedures as distinctly social activities.

4.5 The voice of the consumer

Survey evidence shows that 'consumer perception' is another decisive arbiter of quality by small-scale vigneron. Discernible shifts, according to the 31 growers pooled, are occurring in consumer-demand for wine. Moreover, growers are tangibly aligning cultivation on the ground with consumer cognition of wine quality, and their related attitudes and practices, thereby suggesting a very unique mode of strengthening. This confirms the general maxim that wine companies need to be more consumer-oriented rather than production oriented, and in this regard smaller companies, which are more flexible, have an advantage.

A key lesson learnt through the survey is that consumer conceptions of quality cannot be understood without some consideration of the meaning attached to other key terms which themselves incorporate definitions of quality: 'attraction', 'variety', 'traceability' and 'safety' are explored here. These meanings, in turn, cannot be separated from the social interactions within which they are constructed.

'Attraction' is where winemakers tap into the subliminal wants of consumers in terms of such features as taste, flavour, and appearance. Orange is at the forefront of the expanding market for premium 'cool climate wines' in Australia. Wines of the Orange region are unique as the area in which the grapes are grown is high altitude which

¹⁵ A Pacific Ocean-based climatic anomaly bringing alternate wet and dry conditions to the eastern board of Australia on time scales of 2-5 years.

combined with the nature of the soils creates regionally distinct character in both red and white wines. Cabernet Sauvignon, for example, has intense colour and strong berry character and shows greater complexity than wines of, say, neighbouring Mudgee and Cowra (ORVA, 1997). Chardonnay, too, develops more intense tropical fruit flavours than other cool climate regions when grown on the region's more fertile soils.

'Attraction' is achieved at two levels then. First, the flavours and colours garnered by grape growing in cool climates – this contrasts, yet complements, the warm and hot regions that occur close by and lower in elevation, namely Mudgee and Cowra.

Attraction is secondly sought by growers through the predisposition of the Orange wine region to more inherently suitable grape varieties, such as Sauvignon Blanc, Chardonnay, and Pinot Noir. The development of a traditional regional character that consumers are able to resonate with is a highly significant component of the consumer code of conduct in long established wine regions. Winemakers in the Hunter, for instance, have sustained the production of wines based on the Shiraz, Semillon and Chardonnay grapes for many decades, defying short-term interests in fashionable grape varieties. Similarly, in Orange, the regional signature of boutique wines, compared with the often homogenised product of larger enterprises, entrenches a strong producer-consumer association. Decisions applied during vinification by productivist wine companies, on the other hand, result in such large variations in style and flavour that the relatively small amplitude of regional difference seldom shows up.

'Variety' of wine product is another instance where smaller producers are constructing practices in the vineyard according to the finesses of consumer taste. This 'boutique' dimension is arguably unmatched by larger wineries, who are obliged to supply more staple wine styles in line with their market-hold on the beverage wine segment. With boutique players, grape varieties are often unorthodox. Osmond Wines, for instance, specialises in boutique style varietal wines made from black Muscat Hamburg grapes. One wine writer wrote of the estate's wines: "the Osmond family have shown definite winemaking skill in turning out three wines which are all clearly varietal but differ in style" (Winewise, 1998). Cargo Road Winery is another case in hand. It is one of only four wineries in NSW to make wine from the rare Zinfandel grape¹⁶. Its proprietor, James Sweetapple, remarks:

"Producing new wine is crucial if the [Orange] region is to stay in front and protect its boutique nature".

Wine style is more experimental and invariably inimitable. Sweetapple explains it as such:

"Murray Smith [of Canobolas Smith] will produce a chardonnay different to me and one of the joys is he will make his Merlot in a different way to me, just as at Bloodwood, Steven Doyle will make it differently. That is the importance of boutique wineries".

¹⁶ A grape variety that is rare to wine grape production in NSW and Australia in general, yet which other 'New World' wine producing regions are planting and cultivating extensively, in particular California.

Survey data reveals that a further proportion of producers are strengthening network relationships with consumers by recourse to interpretations of quality in terms of 'traceability' and 'safety'. This is consistent with Marsden's (1998) observation that opportunities exist for producers of SFPDs to cater for 'careful consumers' who are increasingly seeking wines that can either be bought direct from producers or at least traced to their origin. Wine writers (Halliday, 2000, cited in Winepros, 2000), viticulturists and vintners report that there is a growing proportion of consumers who are opting for wines with proven organic production methods. This has been spurred in no small part by the silver nitrate contamination case at Kingston Wine Estate, Victoria in June 2000. The use of silver nitrate to remove hydrogen sulphide from various Kingston Estate wines was found in breach of the requirements of the Federation Food Standards Code Regulations.

Beck's (1992) theory of 'risk society' is premised around such events. In late modernity, consumer-safety and environmental issues are becoming increasingly unavoidable, unlimitable and unattributable as modernisation increasingly rebounds upon itself. Incidents such as factory leakages, GM food scares, product contamination cases and ingestion of pesticides have led to public doubt over the prioritisation of scientific knowledge in assessing risk in society. Consumers are increasingly becoming concerned by food and drink quality in particular. They are willing to support initiatives supplying produce whose quality represents an alternative to that of the intensive or industrial model, in the light of food health and hygiene problems such as E.coli, BSE/ vCJD and Foot and Mouth disease. The contamination case at the Kingston Wine Estate fits with this sequence. Perhaps not in the long run, yet in the short-term, the case tarnished the industry's image amongst consumers. This occurs despite the fact that the Australian Wine Research Institute, esteemed for its scientific rigour and objectivity, showed no evidence of silver nitrate residue in a sample of Australian wines it tested. Nor was there the prospect of it ever constituting a health-related issue. This exemplifies the condition, forwarded by Beck (1992), whereby consumer trust is being corroded in large private institutions and 'expert knowledge' that seek to uphold food and safety standards.

The 'risk' has however served to benefit producers who can demonstrate 'clean and green' or 'traceable' production methods. In Orange, boutique producers have proved the most enterprising in this area. As mentioned earlier, 'Indigo Ridge' wines are labeled 'cool climate – clean environment'. The same vineyard operates a biannual newsletter with a section entitled 'How Green Is My Vineyard'. Its owners are keen to express their fondness for working closer with wildlife – wallabies and echidnas regularly feed among the blocks of vines. This is a visible attempt to evoke shared principles of environmental sustainability between producer and consumer. Furthermore, this sub-mode of quality not only tells and performs but also embodies a recursive, environmental effect in the form of a more ecologically sustainable farming system.

4.5.1 Chardonnay shortfalls and the rise of organic wine consumption: coincident modes of ordering and spaces

The constitution of boutique wine networks according to a range of socially constructed consumption criteria, (all related to quality in some way) is serving to enshrine a very durable mode of strengthening between producers and their consumers, or alternatively consumers and their producers. This is not to argue that modes of connection of quality between producers and consumers are absent in larger, corporate networks. Consumer demand for quality is being emphasised across the entire Australian wine industry, with boutique production constituting just one, very small corner of the market. New consumer articulations of quality, by means of the coincident actant of the wine grape market space, are reworking patterns and standards of cultivation across Australia's vineyards, regardless of whether they are handicraft or productivist suppliers of national brands. For instance, premium varieties accounted for just 35% of the total NSW pick in 1990, whereas in 2000 they constituted more than 70% of the harvest (WFA, 2000). The example of the 2000 Chardonnay vintage is useful here. The harvest in question was marked by a pointed shortfall in Chardonnay wine grapes suitable for premium markets. Consequently, upgrading quality of fruit production has become a prerequisite for a wide cross-section of growers. As new tracts of fruit come on-line in Orange, boutique and corporate players alike are becoming more selective in moving away from the mid-range product that underpins the \$10 to \$12 per bottle retail chardonnay. This quality range is well catered for across all the Chardonnay producing areas as growers identify an early return market, but the area of demand, and that which is being met in Orange, constitutes those Chardonnay wines in the \$15 to \$25 per bottle range. Until now only a small price differential existed between premium and non-premium areas, but this differential has grown over the past two years. Premium quality Chardonnay grapes from the Orange wine region now fetch between \$1,600 and \$1,800 per tonne. The orientation of viticultural practices towards the new market niche for premium quality Chardonnay grapes is in turn resulting in the extensification of farming in the vineyard. To produce the specified quality of fruit, boutique and corporate grape-growers alike are exercising more control to target 8 tonnes per ha instead of 12 tonnes per ha.

Similarly, the uptake of enhanced consumer accents on sustainable, notably organic, grape production is – by the coinciding actant of the market – not confined to boutique growers and vintners. Cabonne Limited, the Orange region's largest winery, follows a strict wine making philosophy of 'good quality, chemical residue free production'. The adoption of 'clean and green' farming principles within a Fordist-style outfit infers the extent to which large-scale, national wine producers are adapting production in line with consumer regard for 'traceability' and 'safety'.

It is apparent therefore that coincident actants – namely the disciplines of the market – are controlling the type and standard of production across the full spectrum of the Australian wine industry. The kindred response by a variety of producer sizes to current market patterns, whether that be a shortage of premium Chardonnay grapes or a desire for organic grapes and wine, corresponds with findings from a related study by McManus (2000). Here, burgeoning networks of vegetarian sausage production are shown to invariably intertwine with those of industrially produced meat sausages. This is to the extent that the former has become another division of the expanding market economy. This means that vegetarian food is subject to the logic of the market, and may be

produced by corporations who care little for the principles of vegetarianism or sustainability.

4.5.2 Section summary: the voice of the consumer in networks of growing and winemaking

To close this section, it is assured that boutique premium grape and wine production is the outcome of two consumer-influenced modes of ordering. A mode of ordering of competitive enterprise, where consumer preferences are transmitted via the common space of the market, operates throughout the hybrid-boutique network, in exactly the same capacity as it threads corporate-gearred networks. However, this mode of ordering is mediated and re-articulated by another mode of connection in the boutique wine network, specifically one of a 'boutique' nature. It cannot be taken for granted that the meanings ascribed to food or drink commodities at any centre of calculation within a network will be those meanings ascribed to it by another. In the present example, however, consumers display a tangible capacity to displace, re-arrange and re-translate agri-food practices on the land. The ability of consumers to articulate their own meanings is enhanced by the range of alternative meanings that they give to quality: namely and perceptibly, attraction, variety, safety and traceability, thereby ensuring a more durable and socially and environmentally embedded boutique network.

4.6 Certifiers of quality: geographical indications and the word on wine

That boutique producers are closely attuned to consumer preferences is attested by the fact that certification, defined as where SFDPs gain recognition through a quality mark/label from a professional body, is ranked a fourth yet equally influential sign of quality. Survey results acknowledge that boutique discourses of wine quality are not only being re-regulated in line with new consumer emphases, but also through new certification schemes, particularly recognition from wine critic and wine show agents. This follows waning concern for the region of origin or geographical indication, traditionally the most important certification device for grape growers and winemakers.

4.6.1 Geographical indications for who?

Despite its emergence as the newest premium wine region in Australia, boutique vigneron in the Orange wine region conveyed a widespread dissatisfaction with the lax fashion in which federal government regulates regional benchmarks of quality. Wine labelling in Australia has historically been unrestrained by industry-specific regulations. Producers have merely had to comply with the general labelling provisions of each state's *Pure Food Act*, the consumer protection provisions of the *Trade Practices Act*, and the *Commonwealth Food Standards Act*. In 1989, measures were introduced under the *Australian Wine and Brandy Corporation Act* which required winemakers to retain records to authenticate the integrity of wines which carry a vintage, variety or region-of-

origin claim, termed the Label Integrity Program. This emerged from pressure for guarantees of truth in wine labelling from overseas buyers, and in response to concurrent international trade obligations.

These measures seemingly went unheeded, and the apparent porosity of wine labelling regulation in Australia continued to be contested by European producers, owing to the application of European origin names such as Champagne, Burgundy and Claret and the lack of label integrity as to place of origin. In 1992, as part of Australian-EU trade talks, the Australian government agreed to amend food laws to specifically prohibit the naming of Australian wines after geographical regions in Europe. The implementation of these marketing and branding arrangements is the responsibility of the Geographic Indications Committee of the Australian Wine and Brandy Corporation (AWBC). The body was charged with establishing labelling regulations that require wineries describe the places of origin of wine according to specific geographical criteria, following the approach of France's *appellation d'origine controllee* (AOC).

There is considerable merit in forcing Australia to use its own names for wine. By forging systems for the certification of regional identity, the GIC is attempting to assist both vintners market their products to consumers and to offer consumers guarantees of product quality. Thinking at the national level, the use of Australian names will enhance the ability to market Australian wines to the rest of the world over time. The diversity of Australia's wine regions is a major advantage over some of its New World competitors. Akin to the French, who have Bordeaux, Burgundy, Champagne, the Rhone Valley and so on, Australia possesses Barossa, Margaret River, Hunter Valley, Mornington Peninsula, McLaren Vale, and so forth. The GIC programme seeks to not only brand Australia but also to promote the regions of Australia, all of which possess their own special attributes.

Requirements for label integrity, however, lack the rigour encountered by European vintners (O'Neill, 2000). This is attributable to a perceived lack of support by the national wine industry for tighter regulatory controls relating to origin and labelling. This stems from the industry's ability to source grape juice and wine from many regions around Australia in order to maintain quality and quantity. In turn, this has become a major source of competitive advantage for large sized wine producers. In the Hunter Valley, for example, wine blending has become fundamental practice for its winemakers in order to meet demand for wines from a region with an inadequate grape supply and fraught with highly variable growing conditions. Of all Australian wine regions, the Hunter relies most heavily on the use of imported grape juice, also known as must, and wines which are blended to produce wines of familiar taste and consistent quality from one vintage to another (O'Neill, 2000). Not surprisingly, there has been sharp resistance to appellation controls and label integrity programmes by Hunter producers.

By contrast, smaller wine producers consider clear regional origin labelling unprecedented in terms of sustaining their livelihoods (Gilg and Battershill, 1998). Incorporating geographical source into product identity "in effect, transforms local knowledge into property" (Ray, 1998: 10). The product is thus given a sort of trademark,

“exploitable only by the territory and its component producers who claim ownership of the intellectual property rights invested in the product” (ibid.;10). In the EU, the state legal system has effected regulations to ‘protect’ food and drink products which have a recognisable geographical origin. This is driven by changing consumer attitudes and the desire to protect producer interests in regional SFDPs. The implication of these products with a specific territory strengthens the ability of producers and locales to retain control. Ray succinctly summarises this process: ‘transforming local organic knowledge into property through an extra-local regulatory framework means that localities and producers are being given property rights’. Moran’s (1993) work on the AOC system for French wine is used to show how producers and institutions are able to build alliances which allow them to create strong representations of quality and region of origin which, in turn, enable them to build alliances with consumers. This is helping to reinvigorate domestic and overseas French wine sales. At the least, it has meant the aversion of impending rural crises in certain regions of the French wine country.

4.6.2 Sour grapes: geographical entities and geopolitical disputes

The strengthening of producers’ ability to retain control of regionally-sited food and drink products by means of central state regulation is a far-removed idea in Australia, according to those growers surveyed in Orange and in line with the situation noted above. The sustained laxity of labelling regulations is perceived to benefit larger industry interests, thereby marginalising the voices of smaller parties. In Orange this is indicated by the suspicion with which a lot of boutique vigneron hold the region’s larger, more commercial producers. Take Cabonne Limited for instance. Its large broadacre vineyard at Cudal in Cabonne Shire is located on the fringe of the geographical indication. At the time of writing, it is about to go to its first vintage. Some smaller vigneron perceive the quality of fruit and wine upheld by Cabonne Limited to be sub-standard to their own benchmarks. This is buffeted by the fact that Cabonne Limited has an agreement where 90% of their first ten vintages are forward sold to Southcorp, Australia’s largest bulk winery. In turn, smaller players fear that larger actors will be in a position¹⁷ to hijack the Orange name. The standard of consumer reputation currently wrought by the Orange appellation will thus be jeopardised, thereby handicapping industry growth:

“Orange is a marketable region at the moment. It will lose that with the likes of Boomey. Their quality or style of wine is not going to be representative of us smaller, fine-wine producers”

“Why would we want to embrace Boomey, they are just going to kill the Orange name, and the business, anyhow they don’t come to [ORVA] meetings”.

“Cabonne will sell wine for fifteen dollars, and they will ruin it for us”.

¹⁷ Wine must contain a minimum of 75% of fruit from a certain region for it to be labelled as such. Thus, in this instance, if Southcorp produce a wine with 75% or more fruit sourced from vineyards in Orange then it can label and market that wine as emanating from the Orange region as such.

This problem is consistent with O'Neill's (2000) findings in the Hunter. In the 1996-97 vintage, the Hunter Valley produced less than 5 percent of the wine grapes used in bottled wine. Yet industry sources estimate that bottled table wine carrying Hunter Valley labels comprise closer to 10 per cent of Australia's total bottled wine that year. Furthermore, the major corporations have successfully diffused their Hunter Valley trademarks, for example Lindemans and Richmond Grove onto wine products from other regions with the specific intention of maintaining the allegiance of wine buyers. The US is experiencing similar problems with the overlap of Geographical Indications and trademarks for example. There is currently a dispute between the small US label Rutherford which was bought by a larger producer. Rutherford is also the name of a town in Napa¹⁸, but the trademark holder uses no Napa valley fruit in the bottle behind the brand (Taylor, 2000). This situation is exacerbated by the rise of 'virtual' wine companies. These signal a new tendency for wine to be made by entrepreneurs who own neither winery nor vineyard, where grapes sourcing and wine production is arranged in a footloose fashion.

Geopolitical disputes have arisen in Orange over what is perceived to be the inequitable appropriation of the region's name and distinct geographical spaces by larger, corporate actors. Two movements are notable (see Map 4.1). The first initiative is a new wine region between the Orange and Cowra appellations, centred on Cabonne Shire. Cabonne vintners are presently negotiating a new appellation spanning the elevation 400-599 metres, which would embrace 60-70 vineyards in Cabonne Shire alone. The second movement could be inferred as a breakaway network: there is a core of quality boutique producers seeking to gain accreditation for a sub-region within the Orange appellation, to be called Canobolas. The prerogative for a new sub-region lies with those ORVA producers whose vineyards lie at 750 metres to 1050 metres above sea level (a.s.l.). This embraces those vineyards within closest proximity to the City of Orange. Interestingly the determination of the Orange appellation in 1996 was not a conflictual process. In fact, a condition quite opposite to that witnessed now (and in places such as the Coonawarra) was evidenced. A number of growers situated at an elevation of 650 metres a.s.l. opposed classification within the Orange denomination, wanting instead to be a part of a Molong appellation¹⁹.

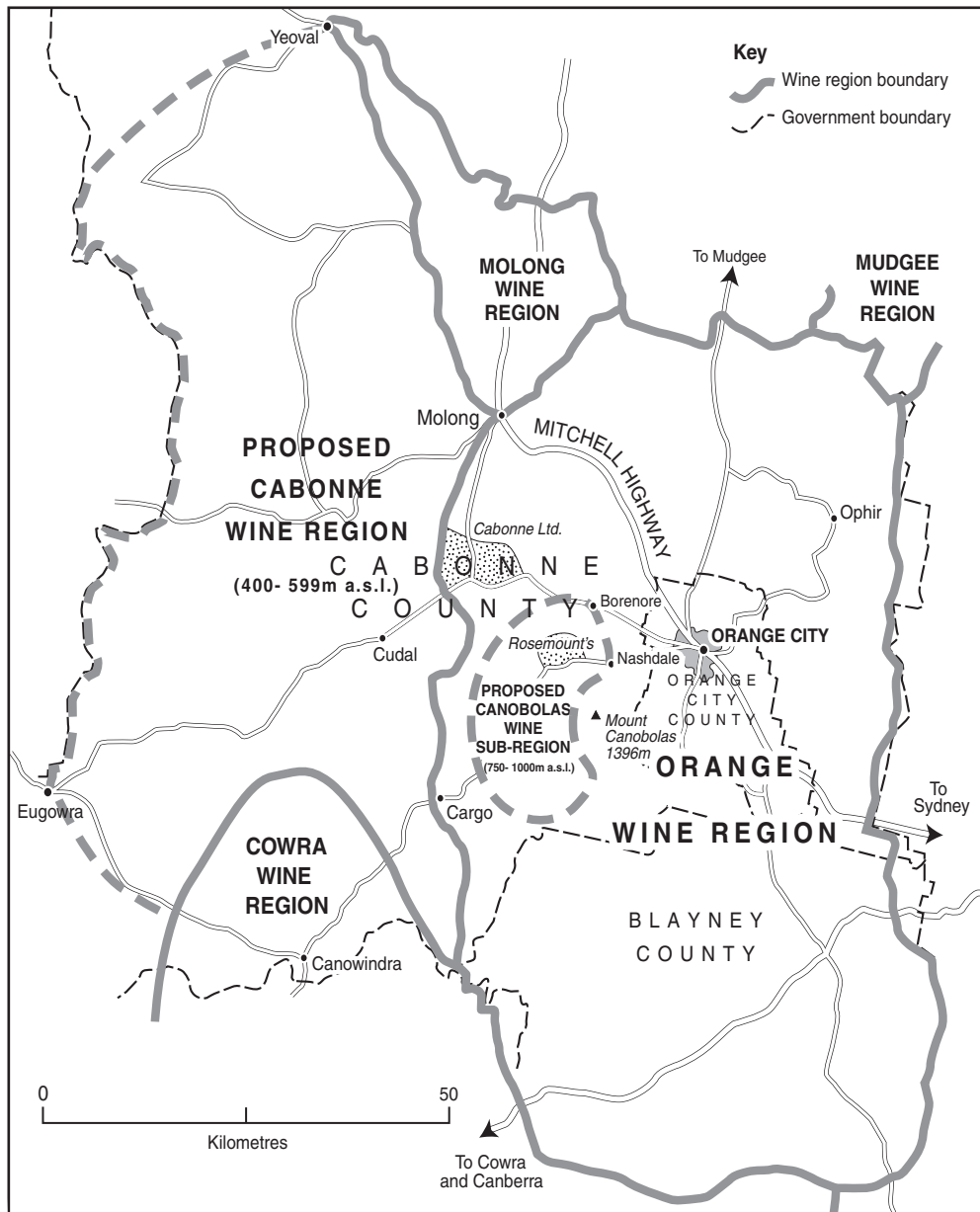
4.6.3 Is the appellation as a code of quality dead?

It is apparent that appellation status is somewhat of a mixed blessing in Orange. Material advantages flow from being able to label wines as originating from the Orange region (see table) as opposed to Central Highlands or NSW, Australia. However, there is a general perception by smaller growers that the geographical indications programme is regulated by federal government to serve the self-interested, profit-maximising interests of larger actors: notably the large wineries and federal government itself. Proposals for

¹⁸ A premium wine region in northern California, USA.

¹⁹ Current vigneron opinion anticipates a Molong sub-region.

Map 4.1 Geopolitical disputes in and outside the Orange wine region.
 Source: MPA



the Canobolas sub-region within the Orange regional appellation can be viewed as a device whereby boutique producers wish to distance themselves, territorially and in terms of pedigree, from more mainstream production networks. It is ironic therefore that a request for a new sub-region by smaller viticultural actors must be mediated with an actor, the GIC, whose liberal regulation of the existing Orange appellation has directly spurned this new proposal.

A noteworthy point from this section is the different need for and attitude towards regional certification between Australian vignerons and their Old World counterparts. Interest in geographical indications in Australia notably derives from those companies who are most able to identify a material advantage. By contrast, the uptake of protected designations of origin (PDO) among winemakers in southern European countries, like France and Spain, are a means of preserving regional traditions and marginal enterprises from the branding piracy of international capital. In short, both systems seek to enrol quality marks which stress the cultural production of grapes and wine. However, given the relatively unprotected nature of Australian production and trading markets, the cultural significance attached by Australians to geographical indications is seemingly swallowed by their perceived essence as marketing tactics.

4.6.4 New certifiers of quality

The questionable integrity with which the geographical indication conception is regarded by small-scale farmers in Orange, (apparently designed to protect the private interests of larger, commercial actors), is leading some vignerons to comply with novel certification measures of 'quality'. These orchestrate robust benchmarks of quality in arenas of wine grape and wine production and consumption. There are two private regulatory bodies that Orange's vignerons are engaging with: wine critic recommendations, and wine show medals. To reiterate, 'quality' is a social construction and thus dependent on the sociocultural, political and economic contexts within which production-consumption relations exist.

First is the acknowledgement of authoritative wine writers. The most highly regarded critic is the Master of Wine (MW). The MW is rooted in the British wine trade. In the early 1950s, the Vintners' Company – a merchant guild whose history can be traced back to the 14th century – collaborated with The Wine and Spirit Association to develop a counterpart to the entry qualifications for other professions. It was designed to equip British importers, merchants and retailers with a wide knowledge of the industry. In 1987, the Master of Wine was made available to people living outside the UK. In 1992, the Institute issued a list of official aims; included were promoting "the highest standards of quality in wine" and taking "a leading role in international events and discussions that affect the wine industry" (in Holbrook, 2000: 75).

The primary industry has traditionally held the qualification in less esteem than the trade, according to Holbrook (2000). It is believed that this attitude might be changing. First, there is a growing number of winemakers embarking on the course. Second, winemakers have a global perspective and they are often marketers of their own wine. Bestowal of the

MW moniker can considerably enhance a winemaker's profile in the industry and the trade, as one boutique winemaker in Orange attests:

“Certainly having an MW acknowledge your wine makes a huge difference”.

More populist Australian wine writers and wine critics are equally important. The Brangayne Wine Company, in its chief promotional brochure, places great emphasis on the wine tasting notes made by James Halliday, co-author of the Australian and New Zealand Wine Companion.

Awards and medals received through wine shows are another popular device for certifying wine quality. They are widely acclaimed by winemakers for similar reasons to endorsement by a MW: by ‘legitimizing’ a wine’s physical quality, awards can heighten recognition of the wine company and its brands. Halliday (2000) believes that the Australian wine show system is far more influential, important and better run than that of any other country. He attributes this to a systematic quest for quality by exhibitors and judges since the outset of the system in the mid 19th century. Shows were run by, as is now, the Agricultural Societies of the Capital Cities and - as the importance of wine grew - at regional shows, likewise run by local agricultural societies. Nowadays, the Australian wine show programme is dominated by ‘The Big Three’: the National Wine Show in Canberra, and respective capital city shows in Sydney and Adelaide. Orange winemakers have been regular exhibitors at all three events. Regional wine shows – Bathurst Cool Climate, Cowra and Canberra Boutique Wine Shows – are equally well represented at. International wine shows have only attracted two Orange wine companies to date – Reynolds and Rosemount.

The popularity of wine show results with boutique players stems from their perceived vigilant definitions of wine quality. In fact, rumination of quality is more likely to be about the style of the wine rather than its technical quality - it is in this capacity that boutique growers esteem wine shows as robust qualifiers, not technical measures, of quality. A large contingent of winemakers perceive such accolades as forming essential tools for raising standards of production:

“It is a means to judge yourself against your peers”.

“The show itself is quite prestigious and we were up against the best in Australia, so it is great to have recognition like that”

“It is exciting because it recognises the viticultural expertise and management invested in this estate. The market for Chardonnay vintage 1999 was pretty tough and now the winery is pretty excited with the result”.

While wine qualifications as a mode of ordering impute coherences of quality across a range of actants within the boutique-hybrid network, (not least of which are those human actors in the vineyard and winery), they are also being represented as the object of

network activities. Thus, winemakers simultaneously gesture show results to be opportunistic, but vital, selling tactics:

“The kudos of winning best wine of the show means I can live off that for the rest of my life”.

“Wine show recognition is an important marketing tool for us”.

This reinforces the point that boutique players are concerned with impressing boutique discourses – in this case, quality certifications like wine show awards - on the final consumer.

By contrast, Rosemount’s marketing department reports less an emphasis on wine show medals and related measures as strategic selling points, and more a concern with their bestowal of recognition from fellow winemakers, akin to a slim proportion of smaller producers. This is captured best by Rosemount’s historic win in 1997 at the Challenge International Du Vin Bordeaux in France, widely considered to be one of the most prestigious wine shows in the world. Each year, the show attracts more than 5200 wines from 40 countries. In 1997 it was concurred that the finest Chardonnay came from the relatively small Central West vineyard 5km out of Orange on the Forbes Road. There was competition from wines emanating from some of the finest wine regions in the world, including Mersault, Montrachet and Corton-Charlemagne in France, as well as California and other Australian wine districts. The chief winemaker at Rosemount’s Orange wine label, acknowledging the award, remarked:

“This is a wine which has been judged by the French, Californian and other entries from around the world. It is wonderful recognition from fellow professionals in the industry” (Shaw, 1997; cited in Winewise, 1998).

4.6.5 Discourses of quality certification: strengthening or destabilising?

Discourses of certification can be viewed as a mode of ordering acting to construct thick layers of quality through the boutique wine network. This discourse is particularly useful for thinking about ANT’s corollary of hybridity. Akin to consumer discourses of quality, values of quality imparted by the current mode of ordering are largely discursive or symbolic. A range of non-human actants in effecting connotations of quality are drawn upon, namely the socio-geographical construct of the wine region. Other inanimate objects which are enrolled to impress a coating of quality are wine medals and certificates (however, these are mediated by a constellation of human actors). These examples underscore a key concern of actor-networks - how discourses are performed and how they are embedded in different materials – not just in terms of language, but also by recourse to symbolic embellishments and, of course, the obdurately physical and intoxicating materiality of red and white flowing wines.

However, the conflictual nature of mobilising a cohesive representation of the Orange wine region poses potentially destabilising elements to the overall project of wine quality

construction at every ‘turn’. Thus, while discourses of quality certification acquire durability from interweaving multiple non-human actants, (the socio-geographical construct of the wine region, and wine show medals and trophies), where these social agents do not become collectively aligned, they become destabilised. The most prominent example in Orange concerns the struggle over where to establish quality parameters in the form of geographical indications, both at regional and sub-regional scales. To reiterate, modes of quality are as much socially contested as they are socially constructed – durable modes of ordering are those mobilised where agency is collectively aligned.

To use another example from the current section, then, modes of qualification are marshalled by a range of professional arbiters of quality – wine judges – that producers are succeeding in aligning themselves with. However, the durability of certification devices is directly proportional to the durability of those other modes of quality of ‘terroir’ and ‘product specification’ cited earlier. Thus, the current mode interacts strongly with the first two modes of ordering, for they provide the material product upon which symbolic embellishments can be layered. In this way, modes of certification can be viewed as ingraining quality, for the purpose of extracting value-added benefits, through alignment of their quality logics with other (at times competing) modes of quality, socially constructed in and external to the Orange district.

4.7 Chapter summary: issues of quality control in cultivation and winemaking

To serve as a reminder, the concept of mode of ordering does not reify abstract social groups, categories or institutions, but examines, first, both the ways in which groupings are constituted through the enrolment of actors into a network and, second, the ways in which such projects are represented or constructed as the object of network activities. Applying this concept to the current study has attested these two tenets. First, then, by bringing forward a focus on the subjective relationships that bind a network, it is evident that multiple discourses of quality are serving to order a variety of social actors in the production domain of the Orange boutique wine industry. The social and geographical embedding of ‘quality’ has, at the same time and secondly, become the primary motto for premium quality grape growing and winemaking among the region’s boutique farmers.

Are we closer, therefore, to a definition of what constitutes ‘quality’ in the production realm and how this is patterned in space, and thus the premise by which small-scale farmers are able to better their economic situation? Survey findings show that ‘quality’ is a tetra-layered palimpsest, where each discourse serves to enact individual codes and representations of quality.

Thus, citation of ‘quality of raw materials’ as a primary indicator of a wine’s quality would suggest that quality resides in a wine’s correspondence to its origins – that a good Australian, cool climate Chardonnay will reflect the fact that it comes from the distinctive physical geographies of Orange. The sanctity of ‘terroir’ is suggested by the current row erupting among Orange’s smaller producers about the ocean of unexciting, *vin ordinaire* flowing (or set to flow) out of the region’s large wineries, and its spoliation of the first-

rate reputation Orange presently occupies. Moreover, it is useful to try and breakdown how each discourse produces 'quality' in the eventual wine product. The role of 'raw materials' or terroir, then, can be viewed as imparting the actual organoleptic quality of the wine. 'Product specification' similarly influences the technical and stylistic quality of a wine. The experimental and inimitable regional signature of boutique grapes and wines contrasts with the often homogenised product of larger enterprises. The third and fourth most highly esteemed bearers of quality were consumer perception and certification respectively. In these fashions, wine quality is imbued via socially constructed criteria that emphasise what are perceived to be quality components in a wine. The ability of consumers to articulate quality is enhanced by the range of alternative meanings they give to the notion of quality: namely and perceptibly, attraction, variety, safety and traceability. Discourses of certification, it was shown in the preceding section, enshrine similarly symbolic strata of quality.

Modes of ordering were demonstrated as able to interact, occupy the same sites and establish discrete lines of (profitable) connection. Discursive representations often act to facilitate the mobilisation of material discourses. To use another example, wine may well reflect its origins or terroir, but consumers must be willing to drink it. Consumer preference for premium Chardonnay or organic wines designates standards that the industry is obliged to meet. In this event, that good wine of necessity mirrors the place it comes from has only the broadest relevance to a wine such as Penfolds Grange, or most Champagne or Port, according to Charters (2000).

Modes of ordering can also be opposing, forcing less durable modes of ordering to disappear. Thus, in matters of region of origin, boutique discourses are being directly challenged by their mainstream counterparts, mainly because an actant common to both modes, the GIC, is acting to strengthen the latter, and (indirectly) obliterate the former. It is ironic therefore that the breakaway actor-network, in the form of the Canobolas sub-region, is performed according to a mode of ordering which inhabits the same actant, i.e. the GIC, that obliterated its 'parent'.

There are two messages then in understanding modes of quality in wine. First, as discourses that interweave the multiple agencies of a selection of non-human actants (climate, soils, grapes, grapecrushers, geographical entities, medals and awards), they perform a very durable mode of ordering. Their performance as modes of strengthening is evident by virtue of their recursive social and material embeddedness across the network, as the following examples serve to illustrate. Certification devices impress a veneer of quality not only upon purchasing consumers, but also fellow producers. Consumers display a tangible capacity to displace and re-arrange what grape varieties are planted in the vineyard. Conjoined human and technological capacities in wine blending produce wines of distinctive taste and premium quality, which tap the subliminal wants of consumers.

However, and secondly, the meshing of the actions and competences of multiple mediators is a process fraught with variability. Two examples serve to illustrate this point. First, the physical geographies of Orange's vineyards, by expression of the quality of the wine grape vintage, become the agency on which the fortunes of the whole

boutique wine network are premised, from the space of the farm kitchen to that of the bank manager's office and the shelves of fine wine shops in between. Second, presenting 'the' coherent geographical entity that is the Orange wine region is an increasingly disputed project, leading to the dissidence of a small group of actors within the existing network. This is a highly undesirable outcome given the Orange wine industry is moving towards a level of maturity which requires the adoption of sound marketing principles emphasising quality across the board.

To conclude, the point about something as subjective as quality is that no one can be absolute in their portrayal of it. It cannot be taken for granted that the meanings ascribed to wine at any centre of calculation within a network will be those meanings ascribed to it by another. In the case of the Orange boutique wine network, however, multiple social actants' conceptions of quality are shown to be mutually aligned and supportive, thereby realising the network's intention: to enhance small-scale producers' profitability. In turn, modes of ordering that spin grapes, vineyards' physical geographies, appellation systems, and other quality certifiers as other than passive agents through multiply sited networks are shown to be both possible and extant.

5. 'Orange'aning the marketing of boutique wines: leaping beyond the farm gate

The preceding chapter showed that small-scale, boutique wine production networks in Orange are evolving closely together with an assortment of modes of quality. However, making a quality wine is one thing, selling it is another. Marketing for small-sized wine companies in Australia is becoming increasingly more competitive, hence emphasising the need for companies to maintain a competitive edge through innovative marketing (Lockshin, 1999). The intention of this chapter is to report how Orange's boutique wine companies are building and exploiting market-based assets. All fifteen of the small wine companies surveyed for the purpose of the current research reported primary involvement by the farmer in *all* tiers of marketing, be that the personal encouragement of export associations or the construction of brand identities and labelling. This is a remarkable phenomenon. As Joseph (1999) notes, most small wine companies live by production and possibly distribution with little attention paid to value-added processes. This chapter explores the reasons behind, and implications thereof, Orange's vintners' and vigneron's attention to marketing.

Examination of how boutique producers are constructing specialist marketing discourses in order to prise open new market spaces is facilitated by the use of ANT and the concepts of mode of ordering, collectivity and hybridity. The extension of networks across space is performed by the geography of social flows, which "by nature [are] neither local nor global, but more or less long and more or less connected" (Latour, 1993: 122). This process of geographical reach is termed 'network lengthening' by Latour. Hence, a network approach has the capacity of progressing an understanding of contemporary rural social and economic change in Australia by illuminating rural areas as potential sites for economic innovation and new forms of exchange and transaction. This perspective gives our understanding of rural development an infusion of contingency and possibility which it has for so long seemed to lack. The task for this chapter, therefore, is to trace the formation, development and content of winemakers' multiple marketing and selling networks; assessing how they can lead to developmental (financial) change, and identifying how constraints in actor spaces and their alignment serve to restrict their development. These are analysed as evolving in two geographical settings; those of local, and extra-regional and export arenas; and are cross-referenced with related findings from larger wine companies. On the basis of the empirical findings presented in this chapter, it is proposed that the integration of small-scale Orange-based farmers into niche consumption markets and connecting geographies of marketing and trade is leading to new influences upon the use of the district's rural lands and thereby its territorial differentiation. The reality is obviously complex and variable, and one should be cautious in assuming that the density or richness of extant networks necessarily leads to positive economic growth trajectories (Marsden, 1998).

5.1 Network lengthening in the local arena: the growth and importance of the cellar door in geographies of local market development

Before exploring processes of network lengthening in the local market arena, it is worth retelling that survey data conducted by the researcher showed fifteen of the thirty-one boutique grape growers to have formed individual wine companies. This is suggestive of the fact that the profitability of farming in Australia depends increasingly on the processing and marketing of value added products rather than growing alone. Some of Orange's small farmers explained their desire to exploit market-based assets for the following reasons:

“To build a rapport with the consumer, there is no substitute for quality. Not only is it [the winemaker's] job to make a good wine, it is also in [his/ her] interests to market and brand [their] own wine”.

“All too often, you see farmers across Australia lose interest in their product once it leaves the farm gate, although winemakers are better than most. ORVA educates growers to seize those value added components beyond the farm gate”.

“There are three steps in the making of a successful wine. The first, cultivating grapes, is quite easy. The second part, making the wine, is not hard either. Third is selling it. This is the hard but lucrative bit, but [Orange's winemakers] are trying to do it for themselves”.

From these examples it immediately becomes important to talk about sales and marketing rather than just marketing, for marketing is the strategic machine that drives sales.

In the local market arena, the cellar door represents a crucial marketing and sales space for boutique wineries. According to Dennis (2000:12) “Orange has become a serious destination for the winery hopper”. Cellar door sales are run at 10 vineyards. Four more are due for opening within the first six months of 2001. There are signs that this activity is increasingly being “incorporated into the growth of a distinct ‘wine tourism’ market, with a whole plethora of related activities” (Connell & Gibson, n.d.:1). Restaurants and cafes, berry farms, orchard visits and farmstays have all mushroomed in recent years. Hall and Macionis (1998: 198) define ‘wine tourism’ as:

“visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/ or experiencing the attributes of a grape wine region are the prime motivating factors for visitors”.

The nationwide economic value of wine tourism was estimated in 1996 to be “approximately A\$400 million with a potential value of A\$1,100 million within the next ten years” (King & Morris, 1997: 246). Certain regions have more developed infrastructures than others – for instance, where the tourist industry in Orange is largely nascent, there are regions such as the Hunter where tourist opportunities have gathered over a twenty year timespan.

For the individual business, wine tourism provides a profitable alternative to the sole production of grapes and winemaking. Value is added chiefly through cellar door sales, or the effective purchasing of wine at the 'point of production'. Winemakers agree that tourist custom is more significant than local custom in terms of cellar door sales.

International tourist custom is earmarked as particularly lucrative owing to the fact that these people are willing to spend far more on wine than domestic visitors. According to Orange Tourist Centre figures, 10% of all tourist visitors to Orange in the year 1998-99 were from overseas. Direct sales to the final consumer, through the cellar door and/ or on-site restaurants, are dominant in two boutique businesses, although this escalates to five when all local outlets are considered, that of local bottle shops, hotels and restaurants. None of these winemakers are completely reliant on cellar door sales. This contradicts O'Neill's (2000) findings in the Hunter Valley, where the cellar door is often an imperative for the survival of smaller wineries as an instant market for wine sales, thus providing a supplementary income for many small viticulturists finding it a challenge living off primary activities alone.

Nevertheless, farmers emphasise the cellar door to be perhaps the most important node in the lengthening of selling networks. Moreover, as a mode of strengthening, it presents a space where winemakers are able to develop post-visit strategies that consider more than just making the cellar door pay its way. This runs parallel to the axiom in modern marketing literature that it is cheaper to retain rather than attract customers and that marketing activity need to be concerned more with balancing consumer retention and customer acquisition strategies (Beverland, 1999).

Winemakers seek to make durable those new marketing relationships forged with customers at the cellar door by the performance of two observable social practices. Firstly, unlike their larger, 'faceless' counterparts, smaller vigneron possess the clear advantage of being able to talk to a significant proportion of their consumers in the form of cellar door visits. These offer the tourist the opportunity to learn how grapes grow, discuss winemaking skills with the winemakers, as well as wine tastings. This process of direct marketing leads to direct selling. Vignerons agree that it offers the most perfect form of valorisation of a product: winemakers can emphasise aspects of 'quality' in the farming systems (and retain the whole margin of their products), while consumers are replete with information on the wine product and its inherent farming system.

Second, tourist interest is maximised at the cellar door by winemakers' involvement of tourists in the consumption of material and symbolic elements in the Orange wine landscape. Tangible aspects of the Orange grape growing and winemaking region are mobilised with the aim of achieving post-visit consumer support. These include vine-covered mountain slopes, winery buildings, annual grape harvesting and the intoxicating nature of the product itself. A second reading would suggest that such aspects are in fact socially engineered in accordance with the notion of a cultural landscape. Cosgrove and Daniels state that "a landscape is a cultural image" (1988: 1). To this end, there is a preoccupation with how the tangible viticultural landscape is embellished by:

“the situation, architectural qualities, layout and general ambience of the towns, villages, chateaux and more modest wineries that are the foci of viniculture and the wine trade” (De Bilj, 1983: 55).

Noteworthy here is how the landscape ideal is imparted by local government’s regulation of those new buildings used for the storage of wine and cellar door sales to conform to a code of architecture that emphasises a rustic, cottage industry feeling:

“The external appearance of buildings associated with wine operations should blend with the landscape to the satisfaction of Council which is particularly significant on the footslopes of Mount Canobolas and where visible from Main Roads and Highways. Buildings used for wine storage and sales should be designed to reflect traditional farm building styles consistent with the rural landscape of the area” (Orange City Council, 1997).

Another example is the progressive establishment of Orange as a centre for special events: music festivals, food and wine exhibitions, product promotions and launches²⁰. Tourists can view complementary activities of the wine industry, such as grape pressing and blending demonstrations. These artisanal activities provide what well-heeled tourists want most: a point of difference and a chance to identify with a real community experience” (Fuller 1997: 35).

These activities lead to a related point. It attests current speculation that farm tourism is moving towards a stage where farming is maintained for mere animation purposes, divorcing farming from its productive origins (Gray and Lawrence, 2000). Former National Party Leader Tim Fischer, in recognising the future importance of this direction for segments of farmers, has remarked that:

“farming is becoming more and more a service industry...if we are not addressing the issues affecting service industries, we are not addressing the issues affecting our constituents” (Australian, 17-18 April, 1999, cited in Gray and Lawrence, 2000:: 42).

Thus, the fact that farmers increasingly are generating income from the enactment of their roles as farmers, rather than for the physical products they cultivate, attests the degree to which survival depends on the adoption of a ‘service’ industry strategy (ibid.)

To reiterate, winemakers seek to strengthen new niche consumption geographies from the cellar door in two ways: firstly, by the construction of a personal relationship between producer and consumer, and secondly, by situating the tourist within a viticultural landscape, itself socially constructed. The performance of unique, socially composed marketing strategies at the cellar door enables the winemaker to construct a post-visit value chain, aimed at international and domestic tourists alike. Two strategies are observable here. First, winemakers are providing information on where the estate’s wine can be purchased in the visitors’ own state or country. Take Highland Heritage for

²⁰ In addition, Orange lacks a major tourist attraction, unlike neighbouring towns like Bathurst (Motor Rally) and Cowra (Ballooning Festival).

instance. There is a large range of wines to sample. They build brand awareness and loyalty by supplying customers with information about where Heritage wines can be purchased as well as putting their website address on every wine's cork. Second, most wineries have mail order capacities. It is very lucrative but requires constant maintenance and supply of a variety and/ or exclusivity of products for members. The quality and price of freight services can also be a limiting factor. Some wineries organise courier delivery services to overseas visitors. One producer explains the service's advantages:

“For the tourist, it is not practical to cart large amounts of wine around with them. For [the winemaker], delivery services are a great way of increasing brand loyalty and extending the wine tourism experience beyond the winery, thereby generating positive referrals, and it would be self funding”.

Building consumer loyalty at the cellar door has other noted business synergies. One winemaker suggested that highly loyal, perhaps repeat visitors are more likely to refer the winery to friends, thereby reducing the need for advertising. Another winemaker reflected that:

“They are also less likely to switch to a competitor if they have had positive encounters with the winery”.

While cellar door sales comprise lucrative selling options, they constitute too small a market to generate sufficient sales to support most wineries. A crucial dynamic in the evolution of cellar door sales is the local market. As remarked beforehand, local custom constitutes a small percentage of final sales for Orange's boutique producers. Difficulties encountered with generating local custom are perhaps so because of Orange's small, immediate market catchment. Comparatively dense rural and proximate urban populations, on the other hand, explain why direct selling, or 'vente directe', is a feature of up to one-quarter of French farms and vineyards (Gilg and Battershill, 1998).

Local patronage is esteemed important nonetheless. There is a fairly strong belief among vigneronns that the marketing task starts in Orange:

“The producer co-operative, ORVA, needs to do more to encourage endorsement locally before going to markets outside of the region”.

Marketing strategies used to entice local customers to the cellar door are quite unusual by virtue of the fact that they are pursued *collaboratively*. In order to increase their local market exposure, boutique growers are forming unique interfaces with key players in the commercial and regulatory arenas of the local wine industry. ORVA, the producer association, is engaging with a range of key commercial players in the value chain such as other food producers, restaurants, hotels, golf and service clubs. It must be understood that alongside new investment in grape growing and winemaking during the 1990s there has, in tandem, been an unprecedented investment-drive into tourist activities associated with wine consumption (local food businesses and wine tourism networks are discussed below). The third network that producers are engaging with is the performance of two-

tier government in tourism marketing. The question for producers therefore is how to align their wine promotional interests with those of other participating agents? To reiterate, ANT gives emphasis to the spatialisation of actor-processes. For the current study, if they are to progress to a position of changing economic conditions, these actors' spaces need to become aligned with one another.

5.2. Discourses of terroir

Winemakers are constructing alliances with local food businesses in an effort to brand Orange as one of Australia's premier restaurant and wine districts. Alliance building is guided first and foremost by the spirit of enterprise. Overlying this, relations are being fashioned by the mutual mode of ordering of 'terroir'. Cuisine de terroir challenges the notion that food preparation can be reproduced from place to place according to venue and demand. Instead, it sees food preparation and consumption as grounded in the landscape – soil, climate, growers and suppliers, that are historically assembled, are nurtured into a complementary and evolutionary network keenly tuned to local growing conditions, markets and each other's needs. This is consistent with findings, documented in chapter four, which denote the importance of geology, climate and culture in the making of Orange wines.

Restaurateurs support and promote the use of local produce. Being so geographically close to the producers and the land has made restaurateurs more conscious of the realities of sourcing fresh and high quality produce. Local restaurants and cafes have access to a gamut of fresh local foods and ingredients, from figs, honey, nuts, jams, mustards and cherries to geese, kangaroo and ostriches. In turn, gastronomists are introducing seasonality into menus and educating consumers about unique local ingredients: "the cycle of rural life means it is not one giant open-air hypermarket. Good food is seasonal" (Manners, cited in Dennis, 2000).

The conscious adoption of the principles of terroir by Orange's restaurateurs has begun a trend in the area where local produce growers are encouraged to adopt techniques dedicated to restaurant rather than supermarket supply. This has led to a more holistic, organic style of farming among local producers: for instance, Waverleigh Park's Pastured Poultry, whose pasture-raised, chemical free chickens appear on local menus. It is noted here that the terroir producer catchment stretches beyond Orange City to embrace a multiple number of farms situated across the Central Ranges zone. The area of the network encompasses poultry and hare farms in Blayney and Canowindra to the south, venison parks in Eugowra to the west and figs from Norland Orchard in Borenore to the north of Orange (see Map 3.1).

Integral to the establishment of the terroir food culture is the complementary role played by Orange wines. In top-end restaurants, local wines are paired with each course or dish to give a 'complete Orange experience'. The Highland Heritage Estate restaurant, keeping with this maxim, is situated among the vines that supply the estate's wines. The restaurant is promoted as:

“showcasing Orange’s renowned local produce on a weekly changing seasonal menu, where [their] chef serves cuisine straight from farm to kitchen. Accompanied by [their] estate grown wines, [they] offer a unique dining experience in the Central West” (D’Aquino, 2000).

In short, the supporting roles played by local food and wine producers are indicative of a *collective* effort to brand Orange as the newest premium wine and dining destination. This mirrors Mudgee and the Hunter’s well-established credentials as elite consumption spaces for connoisseurs of food and fine wine. Imperative to the project’s success is the shared mode of ordering of terroir – Orange’s emergence as the new Western frontier of *regional*-based cooking is premised on its geographical rootedness, much the same as the cool climate wine industry.

5.3 Discourses of small-business enterprise

Tourist operators are another group of actors with whom winemakers are actively aligning their business interests. Support from other tourist agents in the development of a strong local wine industry generates new economic opportunities for all participating activities. There are two types of supporting agent. First is the surge of new recreational based enterprises. These entail bus tour companies, hot-air ballooning flights, independent art and sculpture galleries, animal tourist farms, walking tours of local woodlands, handicraft and homeware stores and markets, golf clubs, fitness services and a range of personal and beauty services – once scarce in the orcharding and grazing region. Secondly, accompanying these developments have been investments in small motel and bed and breakfast style accommodation. As one grower commented:

“I expect the big push into the wines business will continue and that will cause a shift in demand for other businesses as well as property”.

Pubs and motels have been purchased by Sydney-based investors and renovated to provide board and accommodation packages for the wine and gastronomic tours threading their way through the region. Concentrated in the City of Orange district, these developments have dramatically increased the number of people seeking a weekend gastronomic experience in the vineyards. It also testifies to the opening up of new investment spaces, such as commercial property, in the lee of the wine industry’s rapid growth.

Shifts from production to consumption activities have interestingly warranted accompanying shifts in the district’s training support systems. Historically geared to training in agriculture and other rural occupations in order to service the ‘food basket of NSW’, there has been a steep increase in training opportunities catering to the activities associated with the new gastronomic landscape. The Orange City TAFE college now provides courses in food preparation, hospitality, wine and liquor services and viticulture.

The litany of new tourist-geared developments demonstrates how the Orange district is no longer hinged solely upon wine production. Incidentally, the spread of new economic ventures depends precisely on the wine industry. The proprietors of these enterprises are mobilising the social construction of the ‘Orange wine industry’ and moulding it to create economic advantages. The construction of a multi-sectoral value chain in the current fashion advocates another key tenet of ANT, namely the focus on associative power. The business network is shaped by a representation mobilised by an alliance of actors who themselves hitherto had the desire to expand into niche business, service industry or otherwise – but the power to do that was not there in the first place.

5.4 Government involvement: a strength or a dilemma?

The third actant Orange’s boutique wine industry is aligning its marketing programme with is the tourism department in local government, known as Orange City Tourism²¹. The intressement²² of councillors stems from two identities: first, their economic ideologies, and second, their welfarist capacity.

5.4.1 Economic ideologies

New rural questions and neoliberal government values are predisposing Orange local government to a new role in business enterprise. This stance is exemplified by Orange City Council’s (OCC) commitment to Orange’s wine tourism industry. It contributes financial support to the local wine industry’s promotional programme, for example, “by way of its policy to sponsor events and activities that will increase or lead to economic activity” (OCC, 2000). This is in contrast with Daly’s (2000) observation that a key performing capacity of local government is its ability to synchronise development strategies with enabling agents occupying higher tiers of government.

The local governments of the Orange wine region successfully negotiated the development of a NSW Food and Wine Trail with NSW Tourism (see Map 5.1). The idea for this venture germinated with Cabonne Shire Council, although under the guidance of Orange City Tourism, all three local government areas became involved. The project sought to connect already existing regional wine trails into a state-wide venture, to include the existing food and wine Cowra, Orange, Mudgee Experience, or C.O.M.E., in the Central Highlands region, and similar trails threading Canberra and Tumbarumba, the ‘Wine Country’ trail of the Hunter, and the Riverina region. Trail information includes maps and details of attractions throughout the region and the most accessible way around these areas. Participating food and wine regions distinguish themselves to visitors by embracing the common livery and colours of the ‘NSW Wine and Food Trail’, which

²¹ The Orange wine region embraces the local government areas of Orange City (OCC), and Blayney and Cabonne shires.

²² Intressement is where the instigating entity – the collective agency of the Orange boutique wine industry – defines entities in the alliance or network, but does not actually enrol the entities into the network.

have been designed by Cabonne Shire Council. Similar logos are worn at participating wineries.

The intressement of the project by state level government was a contested process. A freight approval process enacted by the Road Transport Authority destabilised the network. The proliferation of non-standard direction signs to wine regions and individual vineyards is contrary to traffic safety principles and inappropriate for maintaining the character of rural areas. Moreover, major regional and state roads fall under the control of senior tiers of government. This means that the arteries of land transport – principal factors in the economic fabric of rural and regional Australia – are beyond the power of local government (Beer, 2000). Thus, if OCC failed to secure the agency of federal government actors, the network would collapse. This is by virtue of federal government’s

Map 5.1 ‘New South Wales Food and Wine Trails’, which is a state-level tourism programme that connects existing regional food and wine trails.
Source: NSW Tourism, 2000.



inscribed capacity of power. The absence of an associative framework of power would seem to deny, almost by definition, the mobilisation of a NSW Food and Wine Trail. In 1999, the network was mobilised following agreement from consenting parties. It was framed by a mode of ordering emphasising the project's ability to stimulate economic growth.

This example illustrates not only local government's ability to synchronise regional development strategies with higher tiers of government, but also its capacity to influence the direction of change in those systems of power. Appropriate here is a remark by the Rural and Industrial Development Manager for Cabonne Shire Council:

"Local councils have the initiative. They need to impact this higher up. Our strength lies in our negotiating ability and our capacity to take a strategic view in terms of planning events, maps and tourist information" (Engelman, 2000).

5.4.2 Welfarist ideologies

The Orange boutique wine network also co-ordinates marketing policies with local government in order to effect its welfarist, rural development capacity. Notable here is Orange City Council's role in strengthening community support for the nascent wine industry. There are two sections of the community where local government is trying to recruit support.

First is Orange's residential population. There is a fairly strong belief among vignerons that the marketing task starts in Orange. Winemakers aim to make Orange region wines become 'the wine of first choice' in the local Orange market. To gain endorsement from local residents, producers are appealing to the local market in terms of a common community identity. By making them feel part of the industry it is intended for them to become 'disciples' of the 'Cool Climate Wines of Orange'. In turn, it is hedged that building 'networks of patronage' in the Orange hinterland will encourage people to promote awareness of Orange wines further afield. It is pitched that this process will prise open and infiltrate larger metropolitan markets, Sydney in particular. One vintner makes clear the implications of this strategy for wine tourism business:

"Getting the local market on side will make it easier to market our wines in Sydney. Local support will reduce the barrier the Blue Mountains present, in a mental and literal sense, to Sydneysiders travelling to wine regions out west like [Orange] and Mudgee".

However, the objective to attract community support is marred by the presence of a relatively unaware, underdeveloped market:

"There's sixty thousand people on our doorsteps and I don't think we have even tried to market our wines to them".

"While some restaurants promote local wines, many do not, and few hotels and bottle shops actively market Orange wines".

The brevity of the Orange market was explored earlier. The enrolment of the community as an agency is periodically blocked by the incidence of producer-community disputes, noise issues in farming most notably. Council has been critical in appeasing these spates of conflict. Various non-viticultural parties, mainly residents but also greenfield-situated businesses, have formally complained over the noisiness wrought by vineyard and cherry orchard gun firing in the ripening season. Subsequent council involvement has led to the placement of time restrictions before dawn and after dusk, and lower-frequency gunning in between. There is also a reported community grievance with Orange's new position as a tourist destination and the influx of visitors this entails. To counteract this attitude, OCC, (enabled primarily by wine tourism's economic multiplier), has initiated local redevelopment programmes, emphasising their mutual benefit for community and visitors alike. New picnic areas and parks have been placed throughout the vineyard area, for example. Orange City Tourism also provides marketing services for existing and new enterprises willing to reorient towards tourism.

Another segment of the community where OCC is seeking to strengthen networks of support, again by its powers of reconciliation, is *other* (Philo, 1992) agricultural producers. The growth of the wine industry and associated tourism services has been rapid in Orange City and neighbouring shires. This has served to create a climate of dispute in an agricultural region historically built upon livestock farming and apple and stone fruit orcharding. There are two examples here. First, let us return to the example of the NSW Food and Wine Trail. The project not only had to respond to obstruction from government officials in Sydney and Canberra, but also objections by non-viticultural producers at the scale of the Orange regional food and wine trail, C.O.M.E. Initially, C.O.M.E. planned a Cowra, Orange and Mudgee *Wine* Trail. Following protests of being excluded, by beef, lamb, wool as well as horticultural producers other than grape growers, the initiative was broadened at the instruction of Council to include their tourist business interests under the Cowra, Orange and Mudgee *Food and Wine* Trail.

Another relevant example is the incidence of clashes arising between different ilks of farmers over the use of different and harmful chemical regimes. The use of certain production chemicals by graziers can kill or seriously stunt vines:

“Spray drift from neighbouring plots is a problem. There are noise issues too”.

OCC has intervened on several boundary dispute issues, especially over spray drift in the vintage season. In places, council has instructed offending producers to erect natural vegetative barriers between properties.

A proven capacity of OCC therefore is its ability to build broad-based community support for the wine industry. This section has showed that OCC can smooth the points of intersection with external agencies such as the wine industry and its supporting and related services, firstly within the wider community and secondly, among fellow producers.

5.4.3 Caught between a rock and a hard place

It is understood that the increased spatial concentration of viticultural activities alongside graziers' paddocks is inciting a number of boundary disputes. Interestingly, a number of growers posit the cause of these disputes to lie with OCC itself:

"Council is encouraging intensive development so as to procure higher [land and water] rates. But they have made a mockery of local planning laws in doing so. The number of disputes will continue to grow as growers increasingly look over the fence at one another".

A dilemma presents itself here. On the one hand, local government is trying to solidify community resolve towards the wine industry, and on the other, it is charged with stoking the incidence of boundary disputes between producers. The intention here is to show how and why local government is susceptible to an intensification of conflicts between the marketised and globalised ideology of food and drink production on one side and the more welfarist rural development goals on the other. This argument is developed by recourse to ideas concerning regional development policy, and the example of the spatial and historical growth of vineyards in Orange.

Growers and winemakers conjecture that OCC's relaxation of planning laws in recent years is directly connected to the rise in producer disputes and related incidents:

"Spray drift from neighbouring plots is a problem. There are noise issues too".
"The sense of a rural landscape can be lost if farming becomes too compacted".

"There has been no consideration of Orange as a high-altitude water catchment area – plot size should reflect this".

OCC specifies a current minimum plot size of 6ha for viable horticultural enterprise. ORVA, in a blueprint for industry growth over the next twenty-five year period, recommends a minimum plot size of 25ha, despite the majority of current growers holding under 10ha. In this way, growers interpret local council as lax in its commitment to principles of sustainable vineyard development and growth. This, growers demonstrate, reflects the fact that local government is able to profit from the development of zoned land. In fact, the wine industry does contribute a significant proportion of public revenue towards the Orange local economy. This is not unique to the Orange local government area either: minimum plot sizes have been lowered to 8ha and 4ha in Yass and Cowra respectively as an incentive to would-be growers.

It is worth pointing out that the wine industry's changing spatio-planning arrangements confirm wider processes evolving in the countryside at present. Local government boundaries and planning laws in Orange are less ossified nowadays. The current 6 ha specification for minimum plot size was implemented under the 1992 Local Development Plan. Plots allocated for farming use were previously set at a minimum size of 24ha, reflecting the historical preponderance of livestock in the region. These were codified

under the 1964 Canobolas Shire Plan and reapproved in 1982. The 1992 revision was prompted almost exclusively by the emergence of vineyards, as well as other intensive horticultural ventures that require smaller farming areas, in that ten year interim.

This concurs with Daly's argument (2000) that historical, local government boundaries, which were constructed around transport and commercial systems a century earlier, do not correspond with opportunities and challenges presented by contemporary economic change, and current environmental management thinking. For a long time, wealth in rural areas was based on extensive agriculture and mining. Local government areas reflected such biases. Commodity price falls and the growth of alternative farming in rural areas, such as vineyard development, have generated challenges to the geographical logic of these units.

Nonetheless, shifts in local planning are arguably a response to the 'post-Fordist' flavour of policy instruments now being applied in Australian regional development. The 1999 budget of the current federal government, which included its outline on regional development, concurs with this shift to a more ardently economic rationalist approach to government. Federal government, it was articulated, could best contribute to regional development through a prosperous national economy and associated labour market outcomes (Beer, 2000). Integral to this shift is a parallel withdrawal of funding for general regional development programmes. As such there is no funding for projects submitted as priorities by regions (Beer, 2000). Regional development programmes are strategised at a federal or national scale. It is the capacity of local government to raise revenue and effect policy. Its ability to do this is dependent on government size and resources. Orange would be classed as a council with a high capacity to act; typical features include being centred around large towns, with populations above 25,000 people (Orange has 38,000 people). These areas have strong economic bases, relatively dense population clusters, less challenging natural environments, accessibility to major provincial cities or State capitals, and sophisticated infrastructure (Beer, 2000).

As Latour (1991) recognises, the nature of a network changes as new actors are enrolled and as the programme responds to the 'anti-programmes' of opponents, in a process known as translation. This enables an understanding of how the nature of an economic campaign or issue can change in relation to shifting contexts. In this instance, the proliferation of local government initiatives in line with the wine industry – production, marketing and tourism - can be viewed as a response to the drawing back of government interventions and the promotion of market solutions. This shifting context has triggered a discernible bifurcation of responsibility. Its participation in the deregulation of the agricultural, rural and food sphere, in response to federal government policy and wider global market forces, has obliged itself a more exacting role in economic development and cohesive community welfare issues. In the ambit of economic development, it has fostered a regional, wine tourism programme which embraces the business interests of multiple groups of producers. In community development, it can smooth the points of intersection between traditional identities and external agencies, such as the wine industry and its supporting and related services. As Daly (2000: 201) identifies, "the many

operating fronts of local government can be co-ordinated into a powerful force for creating a dynamic of development”.

5.5 Problems between small and large players in marketing the Orange wine region together

So far, co-operative marketing strategies are shown to be a proven, working tactic for expanding the local market. The notion of having a marketing umbrella to maximise the potential of the industry locally and further afield is widely accepted by members except for corporate, productivist wine companies. As the industry has developed, there are a number of small-scale vigneron who are keen to co-operate with major producers. This, they suggest, is in the best interest of the industry as it moves towards a level of maturity which requires the adoption of sound marketing principles across all industry fronts:

“Members need to work in harmony so that we can compete with other regions more effectively”.

“We need to liaise with the big guys to promote the district”.

Larger wine companies do not support or endorse local market development campaigns. This may be linked, rather obviously, to the fact that the local market barely figures in the overall sales and marketing agendas of large wine companies. Cabonne Limited is targeting both domestic and international markets, driven by the progressive establishment of company brands for both markets. As well as supplying Cabonne branded wines, a substantial percentage of grape production has been sold under long-term contract to Southcorp, Australia’s largest winemaker. Reynolds and Rosemount place similar emphasis on metropolitan domestic and overseas markets. They wholesale supply the national market through company owned distribution networks. These permit strong brand focus, control of performance and the maintenance of close links with the market and its trends (Reynolds, 2000). The cellar door and local markets are thereby rendered obsolete.

5. 6 Section summary: Orange juice is turning gold in the local market arena

To conclude this section, two nodes have been explored in the lengthening of boutique vigneron’s marketing and sales networks in the local arena. The first site is the cellar door, which is a strategic marketing and sales avenue conducted independently by boutique producers. The image and personality of the management and personnel at the cellar door are integral market-based assets. The ‘marketing’ of a relationship layered upon human contact and trust represents a mode of strengthening inimitable by larger, commercial wineries. Second, and imperative to the cellar door’s sustenance, is the local market. It is illustrated that mobilisation of the local market is underpinned by a collective marketing programme. Producers are orchestrating marketing strategies in alignment with three strategic, locally situated agencies, namely restaurateurs, tourism

associates and OCC. The construction of marketing networks with a range of commercial and government agencies is in the best interest of all participatory parties as Orange consolidates its emergence as one of Australia's foremost gastronomic districts. Collectivity in marketing wine products can also be viewed as a countervailing measure to the increasingly competitive and concentrated marketing environment, as symbolised by the actions of larger, corporate wine bodies. Co-operation is serving to enhance the profitability of a number of agents connected to the wine industry through the *joint* exercise of control at the production stage in the marketing chain. As one winemaker observes:

“The best part of the changes is that all the industries are supporting each other. As more tourists visit, we have more functions and events and then it snowballs. There are currently about twenty different wine labels from Orange... and that's only the start”.

5.7 Beyond the Central Ranges: the construction of extra-regional and export markets

Boutique wine sales and marketing networks stretch beyond the Central Ranges Zone to inhabit multiple sites in metropolitan Australia and overseas. These export markets figure as the most important sales outlets for thirteen of the fifteen boutique wine companies surveyed for the purpose of this study. To build and sustain niche market supply chains across vast and tangible spaces necessitates an array of new marketing programmes. Importantly, these are conducted as private enterprise strategies, suggesting a finite spatial limit to collective marketing strategies.

The geography of vignerons' markets beyond the Orange locality embraces domestic consumption spaces, namely specialist wine retail shops and the competitive restaurant market, in Sydney, chiefly, as well as Melbourne and Adelaide. Seven companies export small volumes to twelve countries. The four largest markets – the English-speaking, rich countries of the UK, USA, Canada and New Zealand – are concordant with the export market patterns supplied by the Southcorps of the world.

The small supply-size warranted by niche market outlets practically precludes all trace of wholesale distribution and retail. This reinforces earlier readings of the mode of ordering of quality which producers are utilising strategically to connect with the final consumer at the end of the marketing chain. Employment of wholesalers and distributors are actants normally associated with mass-market wine producers. The wholesale market's nebulosity obscures the wine producer's ability to market their product to the consumer in mind. Also, winemakers are virtually unanimous over the fact that there is little money to be made in wholesale. Various capital-based factors are also acting to deter winemakers from building market assets in this retail channel. Mainly the wine companies are too small to service the debt associated with wholesale. Other disadvantages cited are the need for warehousing and distribution in all capital cities and the management of staff.

Two boutique marketing strategies aimed at lengthening and strengthening niche market networks are explored here. First is the construction of an export connection between an Orange vintner and London-located wine merchant according to their shared, socially mediated knowledge of specialist wine. The second is the construction of labelling and branding strategies by winemakers themselves, again according to a range of geographical and social criteria. These discursive modes of ordering run alongside a material counterpart, where the boutique winemaker acquires a premium financial return for his wine product.

5.8 A mode of ordering of ‘corporeality’

The distribution of boutique wines to niche export markets enrolls a range of industry and trade actants alternative to those utilised by larger wineries. Small wine companies in Orange are forming trade connections with specialist wine distributors in each overseas market. The distributor performs the twin capacities of distribution and buying, and is often called a wine merchant or importer. This contrasts with larger companies such as Cabonne’s contracted purchaser, Southcorp, who distributes wines via an international distribution network, which inhabits warehouses, shipping freight companies and sales offices in major capital cities of the world, and has done so for twenty years.

Crucially, the lengthening of sales networks in a boutique fashion is a more overtly social phenomenon. Take the example of the export connection mediated between Brangayne, a small vineyard situated on the slopes of Mount Canobolas, and Vonnote Foster, a fine wine importer based in Chelsea, London. The importer sought to create the trade connection with the said winery having consumed a bottle of Brangayne wine at a wine trade fair in London. The connection, initially forged by physical ingestion (of the wine product), was made durable by a personal visit to the wine estate, situated on Mount Canobolas, where Brangayne’s winemaker was able to materially impress his grape growing and winemaking practices and philosophy upon the wine importer, himself a Master of Wine.

It is clear here that the simultaneous lengthening and strengthening of the sales network embraces modes of ordering, (of ‘trust’, ‘quality’ and ‘partnership’), resembling those fashioning other network configurations. There are two distinctions in the present example. First, power is shifted towards the collective capacity of consumption in the construction of the network, by focusing on the role of the wine’s consumption by the buyer. Intrinsic to understanding the role of the wine’s effect on network relations involves discussion of Goodman’s concept of ‘corporeality’, which he defines as:

“metabolism and metaphor to signify organic, eco-social processes that are intrinsic to agriculture, to food, to agro-food networks, and to the hybrid constitution of these practices in the social world” (Goodman, 1999: 18).

This enables the analysis of the location of ‘metabolism’ and its translation at multiple sites within the network, including the social constitution of the body. Metabolism of wine is performed materially and metaphorically, as is true for the present study.

Materially, the wine buyer, (the consumer in this example), imbibes the wine product. Metaphorically, ingesting the wine symbolises co-productions in the vineyard, where agricultural nature and its harvest are co-produced and co-evolve with social labour (Goodman, 1999). The diffusion of power across the network, by virtue of the wine's tangible and symbolic relations with the consumer, is evident in the form of a recursive, material effect, for both buyer and winemaker. The physical enjoyment of consuming the wine prompts the wine buyer to search out the winemaker in question and forge a commercial partnership. The buyer's initial material and metaphoric metabolism of the wine product, at locations in London and in the vineyard on Mount Canobolas, is ratified further in the form of a three year contract where the winemaker attracts a higher price return than that achieved in domestic market spaces. The export quota equates to ten per cent of the wine company's total retail volume, but amounts effectively to 20% of its total retail profits.

The agency of the consumer, by recourse to its identity as a social body of the living organism (Law, 1992) in Goodman's concept of corporeality, marks it as a simultaneous collective, not a mere network effect. In so doing, this overturns a common insufficiency in modernist geographical agri-food studies to conceptualise consumption as determined by production.

The enactment of a mode of ordering of 'corporeality' in the creation of this export network is nevertheless jeopardised by another actant in this network, the supply of wine, which is fraught with variabilites that reverberate through the network as a whole. In order to provide Vonnote Foster with 'premium' wine, the vineyard must produce only the highest quality grapes. If the grapes are of sub-standard quality (reasons may include rainfall, frost, mildew) it will not be suitable for the 'premium' contracts negotiated by the winemaker and the wine buyer. The ability to sustain supply is exemplified by Habitat Winery, whose proprietor has formed an export sales agreement with an upper-class restaurant located in New York City involving the export of twelve crates of wine per annum:

"Maintaining the supply of wine becomes crucial, or one's opportunities in these burgeoning markets can be lost. The wine brand's reputation is similarly tarnished".

Where there is a poor vintage, the grapes' dissension incurs losses along the network, placing the winemaker perhaps the most at risk, for the wine buyer can always source elsewhere. In such circumstances tensions between the modes of ordering of enterprise, its supply dimension in particular, and quality become immediate and tangible as, for example, the cellar door, specialty wine shop and restaurant table go unfilled.

5.9 Branding discourses

The operation of modes of ordering of 'corporeality' and 'quality', in the case of Brangayne's export strategy, ensures that the winemaker's product will be marketed before his target connoisseur consumer market, most probably spurring new exporting

and other commercial opportunities in the process. Interesting here is the question how winemakers achieve sales in other elite, distant consumption spaces. The answer lies in branding, which is integral to marketing:

“It is now accepted, worldwide, that branding and packaging are more important than anything else in selling the first bottle” (Kidd, 1999).

This is a socially constructed, yet not personally mediated, procedure. Modes of strengthening are performed in an alternative fashion, (often drawing on social constructions of geographical phenomena), being denied the capacity to interact linguistically and personally.

To provide some context, it is evident that the wine industry makes use of an assortment of branding elements. Unlike many beverage and food categories, the wine industry has a multitude of brand building sources to draw upon that go beyond basic product attributes. These can be divided into functional and symbolic characteristics. The former category includes things such as wine or grape variety, country of origin, region of origin or appellation, estate, and the parent company. Symbolic characteristics include a range of socially constructed values which winemakers mobilise to market their wines before strategic consumer segments. These often relate to a wine’s functional qualities – the contrivance of symbolic ‘regionality’ discourses in synch with the physical being of the Orange wine region, for instance.

Orange’s boutique vigneron almost wholly supply the premium and super premium ends of the market. In terms of branding, they seek to effect this target market by, primarily, stating the wine’s functional qualities. It is shown that region of origin as a functional quality is developed in close association with a wine company’s brand. Secondary, complementary strategies, it is shown, draw on discursive or symbolic representations of the region of origin, (what is called ‘regional association’ or ‘regionality’) Country of origin and grape variety are other functional characteristics that winemakers embellish symbolically. This contrasts with the symbolic branding ploys of medium-sized wine companies targeting the same market niche. Rosemount and Reynolds Wine Company, it is shown, resort to branding criteria that pertains less to the functional qualities of a wine, and more to contemporary societal trends, such as the correct social statements a bottle of wine can perform on a dining table at a premier restaurant.

5.9.1 Region of origin and ‘regional association’ in branding discourses

Lockshin and Rasmussen (2000) portrays the connoisseur segment as a well-known lifestyle group, who is involved in learning and thinking about wine. This segment is not particularly price sensitive, drinks wine regularly and is primarily concerned with a wine’s quality and production excellence. Charters (2000) note that the connoisseur segment uses the brand in a *functional* manner and is particularly interested in the vintage, grape variety, region of origin and winemaker, as these elements of the wine brand signal quality and excellence. Accordingly, small Orange labels are placing these

elements on the product and are recognising the functional role each of these plays in a connoisseur's consumer behaviour.

The esteemed status of appellation by vignerons is consistent with Lockshin and Rasmussen's (2000) identification of region of origin as one of several material or *functional* characteristics by which the connoisseur market segment evaluates a premium quality wine. Noteworthy here is how winemakers have collectively adopted a single positioning for wine products produced in Orange. Boutique players are promoting their region of origin as a well-administered group, to reflect a common identity with a message that is clear-cut and uncomplicated:

“Cool Climate Wines of Orange exhibit a freshness and complexity that only comes with the slow ripening process of grapes grown on the slopes of Mount Canobolas in New South Wales” (ORVA, 2000).

The objective is to own the cool climate positioning for New South Wales and hence the expression ‘Cool Climate Wines’ precedes the name Orange. Inherent to the process of stating a wine's region of origin therefore is its climatic phenomena. The importance of a wine's region of origin was stated in chapter three.

That region of origin is employed to effect value-added components above all other functional criteria is embossed by the thickness of regional imagery encoded in labelling. Nine of the fifteen boutique wine companies mobilise images of the geographical region of Orange to maximise the positive pecuniary advantages a geographical entity, such as a wine region, can possess by virtue of its physical tangibility. Two types of regional imagery are apparent.

The first category symbolises general facets of the Orange geographical region, of which wine grape cultivation is a part. The Central Highlands hills range figure on two labels. On the back of the bottle, there are copious supporting references of ‘vineyards flanking the slopes of mountains’. Donnington Vineyard wines carry an image of a single stag in reference to the traditional presence of venison in the region (see Figure 5.1). Other faunal images peculiar to the Central Highlands and utilised by wineries are storks and partridges, represented by Ibis Wines (see Figure 5.1) and Faisan Estate respectively.

As well as hallmarks relating to non-human entities, such as topography and fauna, there are referents geared to the historical occupation of the region by colonising man. In relation to the historical unreliability of water supply in this highland region, Wellwood Estate wines are emblazoned with an antiquated image of a water well. Logan Wines uses a grape-stained footprint on its labels (see Figure 5.1). The image:

“honours the pioneers who once crushed grapes with their bare feet”.

This is not related to the Orange region. Rather, it comprises a broad reference to the beginnings of the Australian wine industry in the mid-19th century.

Figure 5.1 Wine labels from Donnington Vineyard, Ibis Wines, Logan Wines.



The second type of imagery makes use of *site-specific* places within the region. Mount Canobolas, the extinct volcano which dominates the surrounding countryside, features on three labels: Nashdale Vineyard, Canobolas-Smith Wines and Highland Heritage Estate (see Figure 5.2).

Figure 5.2 Wine labels from Nashdale Vineyard, Canobolas Smith Wines, Highland Heritage Estate.

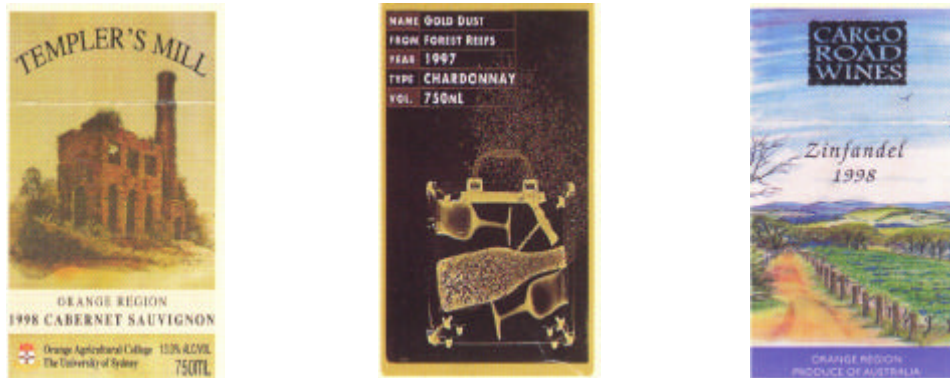


The Templer’s Mill wine label (see Figure 5.3) depicts one of Australia’s first flour mills, providing flour for the early gold fields at Ophir near Orange. This historic mill is now a ruin on Narrambla, an adjacent property to the vineyard and birth place of Australian poet A. B. (Banjo) Paterson. Similarly, Gold Dust Wines draws the connection between the present vineyard site, Forest Reefs Tavern, and the historical legacy of gold mining in that area (see Figure 5.3). Likewise, the winemaker at Cargo Road Wines (see Figure 5.3) features an image of their Cargo Road-sited boutique vineyard in order to “differentiate the product and emphasise that we are a unique winemaker within the region” (Sweetapple, 2000).

These examples of ‘regional association’, marketing points of difference are being developed through a range of human and non-human phenomena, from specific places to flora, fauna and local topography. The harnessing of a diversity of representations is aimed at catalysing sustainable yet strong market growth.

Boutique vigneronns are adding other symbolic attributes in bottle branding, although not to the same extent as regional association. According to Lockshin and Rasmussen (2000) a connoisseur searches out further information about wines from a selection of sources they believe knowledgeable. This includes Masters of Wine and other wine writers, and wine show awards. The symbolic roles these factors can play for a connoisseur are linked to their high level of product involvement (Lockshin and Rasmussen, 2000). Orange vigneronns are cognisant of this trend. They are spending a sizeable percentage of their marketing resources gaining recommendations from those specific sources. High profile wine writers such as James Halliday and Max Allen are often enrolled for the preliminary wine tasting and judging process. Brangayne is arguably one of the most successful premium wine producers in terms of brand recognition. A decisive factor here is the kudos attached to this estate’s wine through endorsement from Master of Wine Anthony Vonnote.

Figure 5.3 Wine labels from Templer’s Mill (University of Sydney owned), Gold Dust Wines, Cargo Road Wines.



To reiterate, for the connoisseur, a wine’s functional characteristics are arguably the most important factor in the purchasing-decision. While symbolic attributes lend additional clout, they do not necessarily factor as a prerequisite. Nonetheless, boutique actors are deploying symbolic, regional associations to reinforce the calibre of wine imbued primarily and materially by the region of origin itself. Other symbolic impressions are gleaned from wine critics and similar professional certifiers of quality.

5.9.2 Medium-sized wine companies' branding strategies: targeting connoisseur and fashion drinkers.

Symbolic constructions are, however, paramount to the success of Orange's medium-sized wine companies in meeting the perceived quality standards by the same, connoisseur cohort. However, as discussed earlier, for a brand to be pitched successfully in the connoisseur market the brand's image needs to match the consumers' functional requirements. Thus, a larger company targeting the connoisseur market with a specific brand may have the necessary financial resources to fulfil all the connoisseurs' functional requirements but they must ensure they portray an image of a quality, rather than quantity, wine producer. Failure to do this may serve to alienate the very market they seek to entice.

It is worth rehearsing here the peculiarities of branding when it comes to the wine sector. In most segments of the food and beverages market, big brands are chosen more often because they are widely available, and consumers are more aware of them. The upshot of this is that marketing strategies are then focused on growing brands to become big, and thus successful. The wine sector is notably different. There are no wine brands enjoying the same magnitude of success, defined as market share, as do leading breakfast cereals, instant coffees, washing powders and the like. There are thousands of wine brands offering hundreds of styles with huge variability. Importantly consumer demand is emphasising wine quality and differentiation across the spectrum.

Thus, to ensure they portray an image of a quality rather than a quantity wine producer, the large companies represent themselves in line with the district's boutique wine setting in order to advance their claims to sales of a natural, rural product. The larger corporations, some of whose Orange-labelled bottles contain a high proportion of wine manufactured outside the region, rely heavily on the maintenance of the Orange wine region as a grape-growing and winemaking landscape based around rural family holdings. The small winemakers build the idealised, pioneering winemaking landscape. They cultivate the acreages that form the undulating slopes of Mount Canobolas overlain with a chequerboard of vineyards and cherry, apple and peach orchards.

Other non-geographical, socially constructed symbols which seek to impress a quality, boutique dimension are evident. In the case of Reynolds Orange wines, which are one of several Reynolds brands aimed at the connoisseur, the label includes detailed information on the human involvement in the wine's production. The winemakers – Jon Reynolds and Nic Millichip – are laced to appear as the 'heroes' of the brand and their own tasting notes are included on the back label with a signature. The winemakers' profiles are developed exclusively in association with the brand. Thus, winemakers add value beyond their actual skill in the same way as the region. Better known winemakers add recognition and perceived quality to the wines, which increases their value to consumers.

Some of the medium-sized companies appear to be at an instant advantage over smaller operations in that they can target a greater range of target markets and they can compete in each price segment. Mention has been made here of their forays into the super-

premium market, but they are also well represented in the 'fashion drinker' market. Branding techniques aimed at this market demonstrably prioritise symbolic accoutrements over a wine's functional attributes. Moreover, the layering of imagery is associated with socially constructed values of 'class' and 'style', quite dissimilar from the geographical criteria incorporated to brand wines in elite market segments.

The stock-in-trade of most medium sized companies is premium quality wine, which attracts a higher price than the average cask wine. For these reasons, companies like Rosemount and Reynolds are focussing their marketing strategies on the 'aspirational' or image segment of consumers. Winemakers project a canny knowledge of this consumer segment:

"Aspirational wine drinkers are primarily concerned with the symbolic roles the brand plays, namely the status attached to the brand and the effect the brand has on their self-image".

"A brand in this group needs to be one that is fashionable, and projects an appropriate image and status for the user".

Winemakers glean that this segment makes most of its purchases from a repertoire of previously tasted wines which they perceive to be socially appropriate. A long-term strategy for medium sized companies such as Reynolds, Rosemount and Capercaillie is thus to focus on making their brands a part of the consumer's repertoire.

Two strategic, symbolic devices are observable. First, middle-sized companies highly rate brand advertising in media that will influence the purchasing patterns of this segment, such as *The Weekend Australian*, *Sydney Morning Herald* and *The Wine Magazine*. Second, marketing resources are allocated to brand the company name and the label design to ensure it is stylish and appealing. A prime example is Rosemount. Its 'Rose Label' brand, which encompasses Orange-made wines, is trying to benefit from the drinking habits of younger people (see Figure 5.4). The bottle dress, a single red rose, is minimalist and appealing.

Noteworthy here are the few exceptional cases of those boutique producers who are moving away from regional and place-oriented imagery to the use of human imagery indelibly rooted outside of the Orange region. Take Brangayne for instance, which is trying to advance the wines' image beyond mere ties with the Orange wine region and move towards a more affluent, and exclusive set of consumers (see Figure 5.4). Both the winery and its wine labels are named after a tragic character in an opera by Wagner. Indeed:

"the etching of the Brangayne of Orange label was commissioned in celebration of fine wine, fine art, fine music and fine company".

Figure 5.4 Wine labels from Rosemount of Orange, Brangayne of Orange, Indigo Ridge.



A similar vogue is demonstrated by Indigo Ridge (see Figure 5.4). The stark depiction of a gum leaf in its autumnal colours aims to appeal to an environmentally-friendly section of consumers who share the winemakers' 'clean environment' philosophy.

5.9.3 A summary of branding discourses and the differences between small and large wine companies

This section has served to disclose the branding discourses being pursued by boutique wine companies, in particular the symbolic discourses by which functional elements of wine are embellished. Use of regional imagery is unprecedented as a 'symbolic' marketing tactic for boutique vigneron, itself reflective of the status winemakers attach to the premium tangible attributes of the 'Cool Climate Orange Wine Region'. With regard to medium-sized companies, such as Rosemount, there is equal emphasis on tying values of regionality to the brand name, yet these are increasingly complemented by alternative socially-constructed discourses, aimed at mobilising new societal sensibilities, such as aspirational or 'sexy' fashion drinkers in the service class, and environmental sympathisers.

5.10 The role of government and industry in export strategies

Mention was made earlier of local government's supporting role in developing the local, wine tourism market, both in its neoclassical capacity to mediate new investment and employment opportunities, and its Keynesian ability to uphold social sustainability objectives. Network market lengthening in the field of exporting, similarly, necessitates the weaving of strong, collective relations between winemakers and government officials at local, and state, level.

At the tier of state government, the NSW Department of State and Regional Development (DSRD) performs business forums in Orange City for boutique winemakers and other small businesses. They are organised according to an entrepreneurial logic. The Orange branch of DSRD hosts twice-yearly business forums where trade delegates from various consuls, based in Canberra and Sydney, and international business peoples convene to scope and negotiate new commercial partnerships in the Central West region.

The second activity, the leading of 'export missions', is another entrepreneurial venture. Blayney and Orange Council lead trade missions to Asian and European countries for smaller and larger farming businesses, fostering new trade connections with Orange. Highland Heritage Estate's proprietor established new business partnerships with wine buyers in Japan on a 1997 trade mission to Asia, facilitated by Blayney Council. This example importantly attests the expanding rate and extent of power wielded by local government.

Government councillors also enable the lengthening of marketing networks by virtue of their ability to create development strategies that harmonise with state and federal systems. Gearing boutique players towards exporting is a process dependent on reliable consumer market analysis and forecasting. Orange City Council and DSRD, Orange, liaise with federal viticultural and trade bodies in Canberra, (ABARE and the Department of Foreign Affairs and Trade respectively), in seeking out new markets for wine products. This is imperative given the highly competitive, worldwide increase in supply of premium wine expected to occur within the next five years. This strategy has inevitably involved turning away from traditional wine consuming nations and targeting countries where the consumption of wine is a relatively recent phenomenon. Thus, while the UK continues to import on an extensive scale, growth has plateaued. The drop in the number of wine consumers (35% in France in the past twenty years, for example) in wine producing old-world countries continues. On the other hand, south-eastern and eastern Asian countries, notably China, Hong Kong, Thailand, and Japan, have been among the first of a set of new markets that Orange, and other Australian, wine producers are attempting to enter. One winemaker remarked:

"Markets from Sydney to the UK are exhausted. There are 700 million new wine-drinking consumers in the Northern Hemisphere, mainly in Asia, waiting to be tapped. Effective marketing programmes must begin now so as to build brand recognition".

By networking producer export strategies with enabling agents in trade and industry bodies at state and federal tiers of government, the risk associated with winemakers' ability to export a new product like wine to Asia is reduced, thus enhancing the goal of the winemaker's marketing network. Winemakers mention the importance of information synergies accrued in this fashion. It enables difficulties such as complicated distribution channels, archaic legal systems, different cultural values, and different languages to be overcome more readily.

These two examples denote government involvement in exporting as most effective in terms of its human resource base, reaffirming aforementioned observations of OCC's

individual role in conflict resolution and community development goals. This mode of strengthening is a more enduring marketing activity than simple financial backing of promotional tourist events. As Daly (2000) argues, local government expertise and networks often provide the hardware for development efforts. In a similar fashion, Law (1986) marks out the importance of ‘drilled people’, such as sailors and navigators, in consolidating the expansion of the 16th century Portuguese spice trade. To reiterate, the role of local government illuminated here is consistent with the overall trend in Australian regional policy towards more individualistic policies, those which look to individuals and their capacities to organise development for themselves. In fact, Gray and Lawrence (2000) acknowledge:

“The rise of neoliberalism and its effects have seen policies based on economic individualism: the principle that people will bring on development for their regions if markets are freed sufficiently for them to do so” (2000: 1).

5.11 From Orange to Sydney and on to Hong Kong, London and New York: the globalisation of corporate marketing networks

In section 5.8, a description was sketched of the distribution networks that large-scale, corporate Australian wine companies supply, operating as a defined skein of shipping agents, port authorities, marketing desks and supermarket shelves, situated globally. It was not enunciated how these relationships are formed. Exporting relationships involving the current scale of operation of exporting are framed less by socially negotiated values of fine wine. Rather they are closely dependent on structural pressures facing the national wine industry.

In 1999 the Australian Bureau of Agricultural and Resource Economics (ABARE) predicted a surplus of 80 million litres of wine by 2002 (Stanford and Strachan, 1999). According to its 1999 Outlook Conference Report, Australian wine-grape prices are expected to fall by 35% (for whites) and 42% (for reds) by the year 2003²³. Structural pressures are however more confined to the table wine grape segment of the wine industry. Premium wine grape growing market networks, such as Orange, are thus distanced somewhat from the vagaries of a looming national over-supply of grapes.

This market situation is, according to Travers (2000), redrafting the nature of supplier-retailer relationships across the industry. In the early 1990s, an undersupply situation, because of Australia’s wine shortage and sharply rising grape costs, gave wineries greater leverage in sales negotiations with retailers. Greater supply, due to rapid vineyard expansion in the mid-1990s, is beginning to ensure two things in export markets: multi-national retail companies will recapture their strong negotiating position, and Australian wineries will be forced to accept diminished profits in order to move the greater volumes of wine being produced. Supermarkets will be able to impose price-competitive structures favourable to them, and progress from having to ‘court’ wine companies just to guarantee supply. The nature of the supplier-retailer relationship contrasts with the early 1990s,

²³ ABARE (1999) Winegrape Outlook, 1999 Outlook Conference, ABARE, Canberra.

when supermarkets were constrained from involvement at all stages of sales involvement because of Australia's wine shortage and sharply rising grape costs.

Interestingly, multi-national retailers want to limit shelf suppliers to 300-600 separate labels, from previous highs of 1500. This will directly benefit wine giants such as Southcorp and BRL Hardys who, as highly efficient producers of reasonable quality wine, can justify participation in that corner of the market (Lockshin, 1999). Those 1,000 or so wineries and distributors that are not on the shelf must compete for the fewer specialty stores remaining. Medium-sized companies are most susceptible to losing out in both markets, according to O'Neill (2000). They will be 'squeezed' on one side by supermarkets for not having the scale of economy, and specialty wine shops on the other for lacking the uniqueness of small niche producers.

Changing power relationships within the landscape of multi-national retail can be viewed as posing points of dissension in boutique marketing networks. These are directly connected to the volatility of the market space occupied by medium-sized wine companies. First is the threat of industrialised production systems hijacking boutique styles to mass-produce so-called 'authentic, boutique' wines. Medium-sized wineries situated in Orange, as was demonstrated in the preceding section, are imposing strict grounds of competition on boutique style wines geared to the connoisseur market segment by appearing to be – indeed, promoting themselves as – small, boutique wineries. Gilg and Battershill (1998) identify a similar trend in Brittany, France, where supermarkets are able to manufacture a cider product similar to that made by local, artisanal cider-makers and, moreover, label it as emanating from the Breton locale. Supermarket-manufactured cider is also bottled in a style that deliberately duplicates the 'rustique' appearance of genuine, locally brewed, farm scrumpy.

Second, and related to the first point, it is possible that the tangible possession of a larger market share of the connoisseur market by medium-sized wine companies indicates a failure of boutique marketing strategies. This underscores a wider awareness by boutique players of the vacillating nature of consumption trends. Sustaining market networks, even super-premium types, becomes a fraught process, marked by instability at various points. Gilg and Battershill (1998) similarly chart the failure of niche Breton farmers in their bid to secure urban-based consumer markets willing to pay premium prices. Their programme can be viewed as failing from the angle of the consumer. Market growth was anticipated among discerning consumers who buy from consumer co-operatives with ethical imperatives such as animal welfare, environmental sustainability, community development and so on. This failed to materialise. Sales have continued to stagnate in surrounding rural markets, too. This, they postulate, may reflect increasing trust by consumers in high-street retailers, because of the strict conditions they impose on their suppliers nowadays.

To conclude this section, presence of a small number of large, Orange-situated, wine companies operating global markets, such as Cabonne and Rosemount, is paralleled by a small but influential segment of small companies serving increasingly international markets.

5.12 Section summary: the building up and maturation of extra -regional and export market spaces by the small wine companies of Orange

In terms of export network lengthening, it is apparent that some boutique networks are reorienting towards rising niche markets in south-eastern Asia, while still maintaining some supply to established, affluent, English speaking countries in north-western Europe and North America.

Second, boutique vigneron's export fortunes are developed in close partnership with local, and state government agencies, especially the 'human hardware' inherent to these organisations. Separately, the intention of state assistance, to mobilise new profit-making opportunities, fits with a sequence in the present neoliberal government agenda which considers the establishment of quasi-independent or independent agencies as desirable to the growth of regional business. By contrast, large wineries bypass government capacities in fashioning sales and marketing networks. An alternative kind of 'human hardware' or mode of strengthening - highly skilled, private sales and marketing teams - is erected in these outfits.

Third, expansion of export links for business-purposes commonly drives both networks. In the case of large companies like Cabonne, this is linked, anecdotally at least, to supermarket consolidation in key buying markets across the world, and the need for producers like Cabonne and Southcorp to deliver maximum value at minimum price to make these markets durable. Boutique players' enterprise forays, on the other hand, are shaped by consumer support rather than buyer approval. Customer backing, other examples show, is irresolute. Nonetheless, Orange's boutique vigneron's, by instigating a diverse array of market-asset building programmes beyond the farm gate, are well positioned to maintain the growth patterns fashioned hitherto.

5.13 Chapter conclusion: boutique marketing and consumption geographies at home & away

The development of market-based assets by Orange's winemakers has been conceptualised as the outcome of marketing and sales networks performed at two scales of setting, even though the geography of social flows within local arenas and extra-regional and export arena are "by nature neither local nor global, but more or less long and more or less connected" (Latour, 1993: 122). In the current context of Australian wine overproduction, a secure selling network is a growing precedent. A summary of the results of both sections is concluded by thinking about boutique marketing and consumption *networks*, firstly, as proposed frameworks for business development and, secondly, as ways of understanding social space.

Firstly, network analysis showed that the nature of producers' business growth strategies resides in the coordination of actions embracing marketing, distribution, selling and consumption at multiple locations. ANT enabled the researcher to follow the links or

relationships farmers negotiate with other people and institutions in order to effect a secure selling network, which is a precedent in the current context of Australian wine overproduction. A number of modes of ordering were viewed as strengthening the development and consolidation of these commercial relations, namely those of enterprise, corporeality, trust, terroir, and community welfare. Following how and with whom these discourses were socially and geographically embedded opened up a series of new voices traditionally overlooked in political economy accounts. A key example is the territory of the Orange wine region and its role as an actor in wider branding and marketing strategies. In tune, a network perspective showed how eclipsed voices, such as territorial identities, cultural landscapes, local government councillors and individual wine merchants, even the social constitution of human agents' bodies, are integral to the performance of the overall network objective of strengthening niche commercial relations.

Secondly, the construction of small-scale farmers' market-based assets in terms of a network perspective, (where a multiplicity of Orange-sited agents pool their resources, know-how and husbandry skills not only in concert with one another but a band of external actors too) illuminates how agricultural spaces are constituted and remade by cross-cutting networks of power and association. In this fashion, the key question in understanding geographical processes of agricultural change becomes not that of scale, encoded in categorical distinctions between 'the local', 'the regional' and the 'global', but of connectivity marking lines of flow of varying length (Whatmore and Thorne, 1997) and which transgress these categories. Even those market networks which are considered to be 'global', such as Southcorp or Rosemount, only operate at such scales as socially contested and partial skeins, pushed and pulled *inter alia* by supermarket buyers in the UK and rival competitors in established or re-established wine producing areas such as south-western France, Spain, southern Italy, Argentina and Chile. To conclude, the deployment of a network perspective to understand how some of Orange's boutique winemakers are building niche market opportunities at an expanding scale-rate attests the concurrent idea that space is not to be thought of in metric terms. Rather, space is folded by social networks, where a network brings together a multiplicity of actor-spaces, that may be far way from each other on a map of the world, by a common and uniting mode of ordering.

6. Conclusions: towards a networked cultural geography of small-scale farming in the post-productivist Australian countryside

At a most fundamental level, this thesis represents a critique of the highly formalised political economic discourse on the restructuring of modern Australian agriculture (see Lawrence and Gray, 2000; Argent, 1997). This was dealt with by opening up a different theoretical line of inquiry via actor-network theory and its application in the empirical analysis of one, key tangent of social and economic change in the Australian countryside – the incidence and growth of small-scale, niche farm production, in the NSW region of Orange. The fieldwork findings on the boutique grape growing and winemaking industry in this geographical area suggest that productivist agriculture, in the Central West and beyond, is complemented increasingly by the regional spread of small-scale, niche farming, with an emphasis on crop and product quality and more sustainable farming systems. The combination of the survey's empirical findings and the enhanced capacity of ANT theory to take into account the cultural specificities of different territories and the political and social terrains through which new agricultural geographies are constructed, underscores the wider need to move towards an understanding of contemporary, Australian agricultural restructuring as a process which is “partial, uneven and unstable; a socially contested rather than a logical process in which many spaces of resistance and possibility become analytically discernible” (Whatmore and Thorne, 1997: 289).

At the beginning of this thesis, the challenge was taken up of showing how the restructuring of modern Australian agriculture provides a signifier of deeper changes within the social construction of farming spaces in the Australian countryside. This was developed via recourse to the concept of a post-productivist transition within the Australian farm sector or what has been labelled an ‘Antipodean PPT’. In the few cases where geographers have engaged with the concept of post-productivism in reference to the veering nature and definition of Australia's agricultural areas, it has traditionally been used to acknowledge the differential responses made by farm households at the point of production to new economic conditions in the farm sector. Argent (1997) examines the growth of Kangaroo Island, South Australia, as an international environmental tourist haven in response to the long running farm cost/ price squeeze and the farm adjustment and amalgamation process. Gray and Lawrence (2000), by highlighting the crisis in Australian agriculture, suggest implicitly that farm survival requires mobilisation of coping strategies such as agricultural diversification and value-adding niche production.

Following a similar tack, the researcher initially explored the nature of producers' new commercial rationales (as part of the concept of the Antipodean PPT) according to political economy models. Opportunities for growth by Australia's new rural industries are improving as incomes grow, protectionist barriers are lowered and costs of transportation and communication drop. However, this thesis commenced a more thorough understanding of a PPT within the farm sector in terms of broader social and environmental changes in the Australian countryside. Thus, there are tangible signs (albeit limited and piecemeal in practice), in the form of Landcare and the growth of on-farm environmental amenities (Monk, 1999), that sustainable ecological development

concerns are becoming increasingly central to many producers' decision-making processes. These, alongside recognition of Aboriginal land rights,

“amount to a context that has never been seen before in Australia. Environmental and Aboriginal claims set limits on Western-style development that have previously been ignored, and suppressed” (McManus and Albrecht, 2000: 108).

The emergence of post-productivist land-uses in the Australian farm sector is shown however to be a more tangible consequence of new consumer values and attitudes, which in turn can be viewed as a chief underpinning of farmers' adaptation to new environmental standards. Rising domestic and overseas demand for unconventional or niche Australian food and drink products can be linked to a wider public interest in developed market economies about where food comes from and how it is produced (Bell and Valentine, 1997).

Before advancing a more detailed account of how a PPT in the Australian countryside can be usefully conceptualised in terms of ideas from both studies of farming culture and the nature of social change in rural areas, there is a need to move current research on the market-led PPT beyond descriptive cataloguing of economic changes in the Australian countryside as simply fitting a post-productivist model or as the subject of process-oriented theorisation (see Ilbery and Bowler, 1998). In response to the piecemeal amalgam of conceptual and empirical work on the PPT in agriculture to date, the researcher generated the more searching question of how such developments in the countryside have brought forward with them new regulatory conditions, and how this helps to locate the experiences of Australian farm restructuring as distinctive from those observed in western Europe. Thus, on the one hand, from the perspective of a practical farmer producing bulk products within an export-oriented, largely unprotected southern hemispheric agriculture sector, niche production industries become a means to seize precise market niches, rather than simply aiming at import replacement. In western Europe, on the other hand, it was learnt that the EU central state promotes the development of small-scale, alternative production through highly regulated, policy led agri-environmental programmes. The regulatory conditions generated by restructuring in the Australian farm sector are shown, through the case study of the small-scale Orange grape and wine industry, to in fact be a multi-scaled domain, orchestrated through private, state and communal interest, and all in various states of contest and co-operation (Pritchard, 1999). New articulations in farming land use in Orange for instance are being re-regulated in agreement with emergent post-Fordist discourses of food and drink production. Firstly, tied up with the post-Fordist fracturing of consumption habits, producers were shown as tangibly arranging cultivation on the ground in line with farmers' own and consumer discourses of wine quality. Second, there is the growing environmental and quality regulation of farming at the point of production itself, again in response to consumer preference but also due to the upholding of a mixture of research and development knowledges in Orange's vineyards and wineries, ranging from the commercial codes of quality entrenched by large scale wineries under supply from small growers, to the geographically and conversationally embedded knowledge cultures practised within the farmer-lay community.

This raises another interesting debate with which the researcher has actively engaged, specifically the utility of a conceptual division between 'productivism' and 'post-productivism' for summarising complex processes of agricultural change. In the context of Orange, for instance, the post-productivist transition is more appropriately viewed as encompassing a number of changes that accompany a predominantly productivist agriculture rather than a wholesale shift in the sector towards a small-holder post-productivist agricultural system. Insights from work in rural geography (Friedmann, 1993) and elsewhere in the discipline (Kim and Curry, 1993) on 'Fordism' and 'post-Fordism' were used to overcome the unsatisfactory impression that 'post-productivism' represents the end of a productivist philosophy in agriculture, when this is clearly not the case. Evidence shows that despite the reorientation of farm land use away from unidimensional food production, for most farmers it is 'business as usual' in meeting food output goals. The uncontested hegemony of high-input, high-output, bulk commodity farming in the Central West of NSW, for example, is confirmed by the fact that wool, cattle and wheat are consistently rated as the region's major commodities, accounting for \$361 million of the \$582.3 million total regional value of agricultural commodities in 1996 (Regional Development Board Review, 1996). Where diagnostic components of post-productivism such as niche farm production or farm tourism are evident, they only impact significantly on a small number of farming businesses. In Orange small-scale vineyards account for a total of 196 hectares in a wine region where the remaining 1,200 hectares constitute capital-intensive, classically Fordist farm production. Alternatively, small-scale vineyards produce only a very small fraction – 785 tonnes - or 12% of the region's overall grape crush of 6,450 tonnes in the 2000 vintage.

To return to the crux of this thesis, a major failing of 'orthodox' agricultural restructuring analyses is their under-theorisation of social agency and the failure to grasp the partial and contested nature of the process. Shifting ground to this platform was facilitated by deploying the 'alternative' conceptual apparatus of Actor Network Theory. The use of ANT produced a very different style of analysis from that of more conventional accounts – but does it offer anything of more substantive value? Its value, according to the researcher, lies in its dual capacity to, first, examine the ways in which groupings or networks of actors are socially constituted via engagement with a common discourse, which is often constructed as the object of network activities. Second, the network approach is a fruitful way of thinking about the nature of social relations in space, and how new agricultural geographies – such as the phenomenon and growth of a boutique wine industry in Orange – evolve how and where they do.

First though is an examination of the way in which the actor-network approach provided a useful framework for exploring how and with what effects farmers are engaging in post-productivist land uses, and value-adding processes in marketing (such as small-scale grape and wine production) in order to capture new commercial opportunities. ANT's value in this capacity is perhaps best evaluated against the criteria which it sets for itself and in particular the three elements identified earlier as making the actor-network approach potentially attractive for the current study: the concept of mode of ordering, where the focus is on the associative power of relationships; its treatment of agency as

collective and the inherent process of translation and alignment; and its treatment of both human and non-human entities as equal.

ANT's central feature, developed through the notion of a 'mode of ordering', is the reconceptualisation of power, where power is invested in social relations rather than in entities and in which power only exists when it is exercised (Latour, 1986). The construction of a network of actors is hence necessary for any desired outcome to be achieved (Woods, 1997). In support, the thrust of the geographical problem in this thesis has been a concern with how growers and winemakers construct spatialised discourses of, inter alia, quality, with a web of mediating actants in order to effect various network outcomes. The latter includes the production of premium-standard grapes, the manufacture of fine, distinctive wine, and the prising open of niche market spaces for the purpose of securing higher margins of return.

Thus, in marketing forays, the socially relational nature of agency was exemplified by the fashion in which grape growers and winemakers build a range of alliances with agents in industry, policy and community circles, according to a variety of shared discourses. Producers advance multiple discourses, (trust, terroir, competitive enterprise, corporeality, community welfare) which often overlap and serve to enhance the network's durability and, by implication, the expansion of the pertinent wine companies' market assets.

Similarly, in the production arena, the adoption of an actor-network approach shifts the perspective on the incidence and growth of small-scale, quality grape growing and winemaking from the rather simplistic political economic notion of producers acquiring power (or the extraction of value-added components) through the increased capitalisation of the means of production. Integral to this approach would be a focus on the retraction of labour-intensive activity (picking, pruning and spraying by hand in the vineyard, and a hands-on approach in the winery) in the lee of more formalised and commercialised relations spreading over and colonising boutique vineyards and handcraft wineries. By contrast, ANT shifts the perspective to highlight the way in which growers and winemakers exercise joint control and extract economic value in the area of cultivation via recourse to subjective farming and manufacturing logics of quality, which mobilise an alliance of actants and practices, a segment of which are highly capitalised.

Network thinking encourages the researcher to examine how social practices among grape growers and winemakers are made durable, instead of assuming that they are so. Integral to this process is the (second) ANT tenet of collectivity, where the strength of networks is woven between the capacities and practices of actors performing in relation. Thus, the social and geographical embeddedness of discourses of 'quality' in the Orange wine region, from the growing of grapes to the manufacture of wine, has been understood as the collective representation of four individual, mutually supportive modes of quality. These modes of ordering (both material and discursive) were showed via the process of alignment to interact, occupy the same sites and forge discrete lines of profitable connection. Symbolic modes of quality like state-regulated geographical certifiers, and industry and consumer endorsements, were observed as legitimating those modes of

quality (of ‘terroir’ and ‘product specification’) which physically impart an Orange wine’s calibre.

The strengthening of boutique wine production networks by collective modes of quality is confirmed by growers’ and winemakers’ receipt of superior returns of margin, which is one of the intended network outcomes. To demonstrate, for growers in the Orange vicinity, weighted average grape prices (\$/tonne) for all leading premium white and red grape varieties in the 2000 vintage were consistently higher than those received in other NSW wine regions, cool and warm climate appellations alike (NSW Wine Industry Association, 2000). Semillon grapes, for example, grown in Orange receive a price of \$1,180 per tonne, compared with \$1,133 per tonne in the Hunter, \$859 per tonne in Mudgee, \$850 per tonne in Cowra, and \$377 per tonne in the Riverina. That the price-value of grapes from Orange equates with those of the Hunter is remarkable given that Hunter Valley Semillon accounts for a:

“quintessential Australian white wine. It remains Australia’s closest link to Europe’s finer wine styles” (White, 2000: 59).

It is important to note that the stated prices relate to the weighted average for all grapes cultivated in a region, regardless of holding size. Boutique wine grape weighted prices are believed to sell at margins of up to 40% on top of farm-gate wholesale prices (Hedberg, 2000, pers. comm.) which again has the effect of strengthening boutique producers’ production rationales and selling networks.

The third claim made for ANT is its questioning of our understanding of society and nature as separate concepts. It encourages a more hybrid constitution of the way in which agents – human, technological, and inanimate, in combination and fashioned in a particular way – interact to produce social agency. Survey results showed in the field of production that associations built up between economic actors, or the producers, and non-humans are a key premise by which control is exercised and value extracted. Where there is, for example, a sub-standard vintage or flooding or drought, financial losses are incurred along the boutique wine network, in a number of sites ranging from family farm kitchens to bank managers’ offices. Similarly, fieldwork findings showed that symbolic modes of quality – medals, trophies, geographical indications – not only control high standards in production, they also form essential, value-added marketing tactics. Related here is the fact that modes of ordering can be made durable by their performance in a variety of media – not simply language. Non-human entities were also showed as being able to dissent in selling networks. Being small-scale producers, maintaining the supply of bottles of wine becomes crucial to the development of secure selling networks. Where there is a shortfall in the supply quota, for example, tensions between the competing modes of ordering of quality and enterprise, the latter’s supply dimension in particular, become immediate and tangible as the cellar door, speciality wine shop in Sydney and restaurant table in New York go unfilled.

A hybrid conceptualisation of social agency has therefore enabled the researcher to hear ‘other’ voices and ‘other’ experiences in understanding Orange vigneron’s and vintners’

agricultural and business activities. This seeks to redress Murdoch and Pratt's (1997) perception that a problem with the network approach is that it forces the researcher to follow the key network builders and thereby make sense of a network's outcome or space as the product of the social relations practiced by and between the powerful. As Law (1991: 11) notes:

“While the network approach is good at showing the contingency of power relations by documenting in detail how the powerful become powerful it tells us nothing about those who lies outside the power networks. Those who lack resources, a voice, visibility, will continue to be neglected if we simply concentrate on powerful networks”.

This thesis, displaying a reflexive awareness of this shortcoming, has sought to illuminate the role of the marginalised ‘others’ in the lee of agricultural spaces controlled by the powerful. These are traditionally non-human entities, whether crops or animals or environmental agents, although in the present empirical study non-human actants are demonstrated as carrying significant weight in network relations and the overall outcomes. By remaining sensitive to the innate tendency of social agents to become excluded in the presence of more powerful actors, fieldwork evidence reported that some social agents can be both the powerful and the marginalised at the same time, where this juncture only becomes apparent and observable from the researcher's point of view, which can interchangeably shift between different social networks. Thus, network analysis has helped understand how the Orange boutique grape and wine industry has established an exclusive, profitable terrain in the local market arena by marginalising ‘other’ (Philo, 1992) voices in the local community (residents and greenfield businesses) as well as those in the local farming industry who continue to farm more bulk commodities. In other places and times, boutique players become the marginalised ‘other’, such as in the Orange geographical indication programme, where the GIC and larger corporate wine companies are perceived to be acting together with no or little regard for the livelihood interests of smaller wine companies.

Thus, while on the one hand a network perspective has uncovered how aspects of control and power within the Australian farm sector are increasingly constructed by small-scale, hitherto overlooked actors at the point of production, rather than large-scale, near consumer actors like retailers, on the other it promotes the researcher's reflexive awareness, so that our understanding of Orange's small-scale grape and wine industry will always remain incomplete and partial given, again, that networks do not direct the researcher towards those who fall into the gaps between the networks.

While the network perspective has uncovered how non-human actants are associated with the control and construction of value in networks of niche farming and marketing, fieldwork findings showed that human expertise and resources still provide the overwhelming ‘hardware’ (Daly, 2000) for production and marketing initiatives. This follows in the fashion of Law's (1986) ‘drilled people’, or what are sailors and navigators, who were argued to be imperative to consolidating the expansion of the 16th century Portuguese spice trade. Findings from the present empirical case infer the importance of both farming (viticulturists, oenologists, winery representatives) and non-

farming people (consumers, government councillors, wine merchants) in exercising control at various sites within both production and marketing networks. Fieldwork evidence has showed that farmers – and their engagement with niche farm production - are a particularly valuable focus for analysis of agricultural restructuring, especially given the cultural idiosyncrasies exhibited in concurrent viticultural and winemaking practices in Orange. The conclusions so far have explored grape growers and vintners in terms of the way farmers are responding to significant economic changes in the agriculture sector. However, this thesis has also pursued a specific focus on farmers as people in agriculture. This stems in part from Philo's (1992) critique of rural and agricultural geography as largely 'peopleless'. A decoding of the meanings farmers attach to vineyards and viticultural and winemaking activity in Orange has demonstrated that smallholders tend to exhibit a contradictory attitude to farming itself. On the one hand, many farmers are growing grapes and (in some cases) making wine as a means to live in an area which they perceive to offer a good quality of life. Issues of 'community', 'concern with nature', 'quality food and drink products' and 'lifestyle' were the four most popular factors growers and vintners attached to farming. A small proportion (by no means all) of these individuals can be described as profit sufficers rather than profit maximisers. They are happy to maintain a certain income, and in many cases are motivated by environmental consideration. This is supported by the very size of their vineyards, which in opposition to large scale farming may be considered a form of challenge, but also in their adoption of, for example, organic methods. On the other hand, this whole idea of small-scale niche farming as symbolic labour, neither wholly productive nor reproductive, is thwarted by fieldwork findings that document the intensive capitalisation of growers' vineyards and vintners' winemaking activities. According to the grower survey, vineyard start-up and development costs approximate to \$35,000/ ha over the first three years and \$5-6,000/ ha to operate at full production, indicating a moneyed and financially secure class of small-scale farmer. Thus, in line with Murdoch and Pratt's (1993) idea of the post-rural, small scale viticulturists' and winemakers' engagement with farming can be conceptualised as part of a process of packaging and consuming particular parts of the countryside, while at the same time being a process of producing small parcels of space for rural, niche commodity production.

This exploration of different constructions of farming as an activity, of farmers themselves and of the places in which farming occurs points towards the second arch value of ANT in understanding the emergence of post-productivist landuses and values in the Australian countryside: its ability to understand how cross-cutting sets of social relations in space issue outcomes that coalesce in the form of new agricultural geographies, rather than their comprehension (advanced in political economy) as the primary product of globally uniform systems and processes spreading over and colonising places. ANT problematises the 'global-local' and 'macro-micro' dualities embedded in modernist spatial accounts of agriculture, offering instead a topological spatial imagination that focuses on tracing points of connection and lines of flow at a sliding continuum of geographical scales.

Thus, processes of agricultural change in Orange and the Australian 'bush' more generally are demonstrated as not respecting the discrete boundaries that traditional human geography has constructed as circumscribing the agricultural. The main problem with these regional agricultures is that they not only obscure the fragmented nature of contemporary socio-spatial formations, they also leave opaque the processes of change that give rise to regional shapes. This smacks of Gupta and Ferguson's (1992: 8) observation of "the power of topography to conceal successfully the topography of power", a reference to the way traditional social anthropology has reified 'the village' as a bounded, sealed space and has ignored the flows of social relations across boundaries.

In a kindred way, contemporary processes of change in the Australian countryside in fact transgress such distances and travel over much longer distances and time spans. Thus, the use of spatially proximate clusters such as regions to indicate how Australia's rural lands are shifting reliance away from the productivist landscape developed during the post-Second World War boom towards the exploitation of post-productivist values (see Argent, 1997) neglects the way in which social and economic relationships are forged over longer distances. These relations, Mol and Law (1995: 649) believe, are better thought of as networks wherein the network brings together two or more locations that may be spatially-divorced from each other on a regional map:

"Proximity has...to do with...the network elements and the way they hang together. Relations are not metric".

Applying this perspective to the case of the boutique wine industry in the geographical area of Orange, the region becomes folded by network configurations. Within the networks, orchestrated by varying and overlapping modes of ordering, spaces are constructed as nodes form and links are imposed. The mushrooming of sixty-one high quality, small-scale vineyards and a supporting winery circuit in the Orange locale inter alia other embedded facets of the wine industry is the balanced outcome of the diverse and complex pooling of resources, know-how and husbandry skills by a plethora of multiply-sited social agents, ranging from slow ripening red and white premium quality grapes in the high country of Orange, to in-house winemaking technology in the neighbouring wine regions of Mudgee and the Hunter Valley, from growers farming in the anticipated breakaway sub-region of Canobolas to designators of geographical indications in Canberra, from drinkers of Orange wines in the wine bars of Sydney to the restaurants of Manhattan, and from the state and local government councillors leading export missions into Asia to the exclusive wine merchants, and buyers and marketers dealing in and out of London, Sydney and Orange.

Appendix 1: Orange wine grape grower and winemaker interview survey

Grower name	
Date of interview	
Interviewer	

A. General information

1. Farm characteristics

Wine grape - total of bearing areas (Ha)	
Total tonnes sold (T)	
% grown under contract	
Premium white wine varieties (ha)	
Premium red wine varieties (ha)	
Yield of vines (T/ha)	
Vines Income from bearing areas	

Elaboration of the above/ history of grape growing and/or wine making operations?:

2. Details of any other farm activities. Off-farm income?

3. Details of recent capital investments on the farm. Expansion of acreage etc?
Trellising?

4. Growers for other labels: nature of relations with wineries (% contracted; handshakes or written contracts; quality stipulations)

5. For growers of own labels. Main sales- markets. Nature of relations. Do retailers/ wholesalers show preferred supplier relationships with smaller producers. How much wine is whole-sold locally?

- Direct sales (farmgate sales; delivery rounds; own shop)
- Local outlets (shops; hotels; restaurants)
- Supermarkets and wholesalers
- Overseas niche markets – exporters

6. What are the most important factors ensuring the quality of your grapes/ wine?

- Product specification (including involvement of the owner)
- Raw materials
- Certification/ quality mark (e.g. geographical indication)
- Customer perception
- Traceability of inputs
- Presentation/ promotion
- Premium prices

B. Other agents in the region and wine industry

7. Attitude towards ORVA: what role does it play for yourself and the industry? Vineyard management to marketing?; representation alongside other wineries to government on a range of issues?

8. Nature of relations with other growers and winemakers in Orange region, and Central Ranges Zone (Quality Assurance Schemes; Landcare Committees; producer groups)

9. Do you feel the Orange GIC designation is recognised by customers, and has thus made a difference to sales?

10. Attitude towards local government: how helpful is it to yourself and the industry? (tourist developments; F.O.O.D; C.O.M.E; development planning; road signage; land zoning, etc.)

11. Attitude towards state government (bodies such as NSW Agriculture, Department of State and Regional Development): how useful is it to yourself and the industry?

12. What had been your participation in wine shows?

13. Other important linkages with agents in the region, or elsewhere (Orange Agricultural College; Orange Visitors Centre; Consultancies; agronomic firms; professional and business services, etc.)

C. Farm finances

To gain an idea of the importance of the industry regionally, details of 1999-2000 year expenditures on wine grapes for the following categories are needed:

	Spent in Orange region (Blayney, Cabonne, etc.) \$	Spent elsewhere \$
Fertiliser (include gypsum, mulching)		
Chemicals		
Fuel		
Power costs		
Irrigation & drainage rates		
Machinery Repairs and Maintenance		
Irrigation operating costs (R&M, sprinkler parts)		
Contractors cost harvesting only		
Contractors cost (agronomic) eg. Pruning, spraying (not development)		
Consultant cost (agronomic) eg. Irrigation, pest monitoring		
Labour – picking		
Labour - other casual eg. Pruning		
Labour - permanent not owner		
Other variable costs (eg. Crop insurances)		

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