



PinotFile

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Pinot Noir Suitcase Clone "828": An Intriguing Story Revealed

"It's like a black dog. It (upright "828") doesn't have the papers - the pedigree of a black Labrador retriever - but it's a good hunter (producer)."
Joel Myers, Vinetenders and Siltstone Wines, Oregon

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Preface

An understanding of clones and related terminology is central to this article. For those who need a concise refresher before reading this story, refer to the appendix at the end.

Some Pinot Noir Arrives By Suitcase

All Pinot Noir cultivars existing in the United States originally came from France, but many of these imports that arrived in the 1930s and 1940s were infected with viruses. To control this problem, the Foreign Quarantine Notices of 1948 (Part 319.27 of the USDA Plant Quarantine regulations) "ended uncontrolled importation of clonal plant materials" and prohibited "importation or entry into the United States of any *Vitis vinifera*, except with a permit." The Quarantine Notice also required a post-entry quarantine period for grapevines, conducted by a permit-holding plant pathologist. These regulations allowed grapes to enter the United States for experimental or scientific purpose, but they could not be released until they were tested for viruses. Because of inadequate funding and staffing at the USDA facility, there was virtually an embargo on the introduction of new grape selections by the government for several years.

In 1952, Dr. Harold Olmo, a UC Davis faculty member in the Viticulture and Enology Department, formed the California Grape Certification Association to find, maintain and distribute correctly labeled grape stock that had been thoroughly virus-tested and chosen for vigor and fruitfulness. By 1958, the program was combined with the UC Davis disease-tested fruit and nut program to become the Foundation Plant Materials Service (FPMS). In 2003, "Materials" was dropped and the name shortened to Foundation Plant Service (FPS). This was the first source of virus tested, certified stock available to winegrowers in the United States.

From the early 1950s until 1988, most of the grapes imported into the United States were controlled by UC Davis. The FPMS program at UC Davis was in hiatus from 1989 until 1993 when the National Grapevine Importation and Clean Stock Facility was opened at FPMS and imports into UC Davis were resumed. Several selections of Pinot Noir were imported from France and Switzerland, including Pommard (UCD 5) and Wädenswil (UCD 1A). These became the workhorse clones in Oregon vineyards during the 1970s and 1980s.

During the 1970s, there was widespread interest in clonal diversity, and John Haeger (*North American Pinot Noir*, 2004) notes, "A wave of interest in clonal selection swept through the pinot-oriented winemaking communities in both states" (California and Oregon). While the FPMS was concerning itself primarily with screening, testing and certifying grape stock, winegrowers were interested in the diversity of clonal material being investigated and available in France. Charles Coury was one of the first Oregonians to recognize the French work with clones, having worked as an intern at the National Institute for Agronomy Research in Colmar, Alsace, France, years before in 1964. In 1974, David Adelsheim, founder of Adelsheim Vineyard, spent time at the Lycée Agricole in Beaune, which had the responsibility for testing the Chardonnay clones selected by Dr. Raymond Bernard, a University of Dijon viticultural researcher. Bernard worked under several agencies with the Ministry of Agriculture and Fisheries in Dijon and was also leading a much bigger program selecting several hundred Pinot Noir clones. Many California winegrowers and winemakers also made pilgrimages to France to discover the diversity of clones available.

Oregon State University obtained its own permit to import clonal material from European selection programs in 1975 thanks to a push from David Adelsheim and others. Adelsheim arranged the earlier shipments of clones from Colmar (1975), Espiguette (1976) and Geisenheim (1978). In 1984, Dr. David Heatherbell, Professor of Enology at Oregon State University persuaded Dr. Bernard at the Office National Interprofessionnel des Vins (ONIVINS) to share some of his Pinot Noir and Chardonnay clones with Oregon. The first Dijon clones of Pinot Noir (113, 114, 115) were brought legally into Oregon in 1984. The second set of shipments of Pinot Noir clones (667, 777), were sent in 1988 as a result of a subsequent trip by Adelsheim. Chardonnay clones 76, 95 and 96 were also part of these first shipments of clones. The French Dijon clones were first shared with FPMS in California in 1988-89. This program at Oregon State University was eventually discontinued upon the retirement of the permit holder less than ten years later.

The laboratory technicians at Oregon State University had nicknamed the imported cuttings, "Dijon clones," after the return address on a shipping container of clones from Dijon, France. The name quickly became part of viticulture lexicon. Dijon clones imported into the United States are designated by numbers assigned by the French Ministry of Agriculture known as the Comité technique permanent de la sélection (Committee of Selection of Cultivated Plants or CTPS) and include the most widely planted CTPS clones 113, 114, 115, 667, and 777 (and more recently 459 and 943). FPMS assigned the same 3-digit numbers to the Dijon clones.

Charles Coury was presumably the first to smuggle cuttings into Oregon after working at INRA, Colmar, Alsace, France, in 1964. A number of winegrowers and winemakers, primarily in California, and to a much lesser extent in Oregon, did the same. Since the cuttings were often wrapped in wet newspaper and put inside a suitcase, they became known as "suitcase" or "Samsonite" clones. Trench coats were also reputedly a favorite accessory useful for smuggling cuttings into the United States. Haeger noted, "During the 1980s and 1990s, illicit imports of grapevine budwood thrived." These cuttings were field selections and not clones per se. Many of the smuggled selections became the source of the so-called "suitcase" clones which formed the basis of the heritage clones of Pinot Noir (Mount Eden, Swan, Chalone, Calera, Hanzell, etc.) now widely planted in California.

It is nearly impossible to verify the lineage of suitcase clones since the original smugglers have been understandably reluctant to admit to their transgression for legal and professional reasons. The French are highly protective of their vineyard names and by the mid 1990s, they threatened legal action against any Americans who were found to be using grapevine cuttings from their famous vineyards, especially if they were vocal about it. Many rumors arose of suitcase material from such famous vineyards as La Tâche and Romanée-Conti (so-called DRC clones) planted in California vineyards, but no one admitted to such a source for fear of violating French intellectual property law, not to mention United States importation laws. The plantings are simply referred to as suitcase or heritage clones in the viticulture trade and wine publications today.

There is one suitcase clone, "828," that is of great interest to Oregonians, and whose origin can be traced to a single individual and winery, Gary Andrus and Archery Summit Estate. The complete and intriguing story of "828" has never been revealed. I decided to research the pedigree of the "828" suitcase clone, but found that

some historic details could not be obtained because the central figure in this story, Gary Andrus, had passed away, and those who knew him well and had first hand relevant information, could not reveal or confirm it because of concerns over violating French intellectual property law and United States importation law. The names of some of those who were intimately involved with the story as well as some particulars shall forever remain off the record. In spite of these limitations, I offer a nearly full account of the lineage of suitcase clone “828.”

The Real Dijon 828 First Appears and Eventually Emerges From Quarantine

The vineyards in the Côte d’Or in the late 1950s were performing poorly due to viral infestation, late harvests, and archaic viticultural practices. The French had practiced selection massale in establishing and maintaining their vineyards. The vigneron in Burgundy were generally dissatisfied with the quality of their wines and in need of urgent assistance.

Dr. Raymond Bernard and other researchers of the late 1950s, conceived the idea of “clonal selection,” that is, taking cuttings from vines showing no evidence of viral disease, yet possessing desirable characteristics to create “mother” vines. These mother vines would then be used to establish new healthy vineyards and thereby improve the quality of Pinot Noir and Chardonnay wines in Burgundy. Initially, Bernard’s ideas were scorned by many vigneron in Burgundy and he was forced to use his own money and resources to conduct experimental research in a vineyard in the Hautes Côtes. One vigneron who did support Bernard was Jean-Marie Ponsot, who offered budwood from his vines in Morey-St.-Denis from his Clos-de-la-Roche vineyard as a source of material for Bernard’s early Pinot Noir clonal trials. These cuttings were planted in an experimental vineyard at Mont-Battois and from this stock came Dijon clones 113, 114 and 115 (certified in 1971), 667 (1980), 777 (1981), and others. The clones were descended from individual plants that were the most rewarding clones showing disease resistance, good flavors, reasonable yields and proper ripening in Burgundy’s cool climate.

Over time, Bernard expanded his research, obtained cuttings from many vineyards in the Côte d’Or and beyond, and not only planted vines in his experimental vineyard, but also in the vineyards of the Lycée Viticole de Beaune (the seat of learning for viticulture and vinification for Burgundy’s wine industry). Bernard eventually received the support of the French Ministry of Agriculture and other professional societies in France, leading to increased funding of his research. He became the regional director of the Office National Interprofessionnel des Vins (ONIVINS), the French National Wine Office. Bernard is considered the father of Dijon clones of Pinot Noir and Chardonnay.

Clone 828 is one of 43 currently certified Dijon clones of Pinot Noir in the *Catalogue of Grapevine Varieties and Clones* published by ENTAV-INRA® (L’Etablissement National Technique pour l’Amélioration de la Viticulture/Institut National de la Recherche Agronomique, France). The ENTAV-INRA® trademarked clones are registered and assigned a unique certification number by ONIVINS after approval by CTPS. The clonal numbers are not of any special significance other than an accession number as each new selection has been added to the CTPS system. All plants with a unique certification number were propagated from the same parent mother vine, underwent ten years on average of rigorous testing and research before becoming certified. The origin and authenticity of the clones is guaranteed.

The pages of the 1995 edition of the *Catalogue des Variétés et Clones de Vigne Cultivés en France* list clone 828 as originating in Saône-et-Loire, a large department of France in the Côte d’Or and dating its certification to 1985 (refer to copy of entry below). Clone 828 has a recumbent or prostrate growth habit and is part of the family of Pinot fin clones (sometimes referred to as Pinot tordu clones) that include Dijon 113, 114, 667, 777, etc, to distinguish them from Pinot droit clones of Pinot Noir such as 374 and 583 which display an upward growth pattern from the vine trunk. In an unhedged vineyard, Pinot droit clones are easily distinguishable from Pinot fin clones which fall over. This distinction is central to the story of suitcase clone “828” because it is an upright Pinot droit selection (more on this to follow).


IDENTITÉ ET DISPONIBILITÉS	POTENTIEL TECHNOLOGIQUE		OBSERVATIONS COMPLÉMENTAIRES
	PRODUCTIF	TECHNOLOGIQUE	
N° de clone ■ Sélection ● Origine ▲ Année d'agrément	■ Lieu de dépôt du matériel initial ● Surface en multiplication ▲ Délégation (s) ONIVINS concernée (s)	■ Fertilité ● Poids des grappes ▲ Groupe de potentiel de production	■ Richesse en sucre ● Aptitudes œnologiques
Pinot noir N (suite)			
828 ■ ENTAV 606 ● Côte-d'Or ▲ 1985	■ Espiguette ● 0,3873 ▲ Dijon	■ moyenne ● inférieur ▲ A	■ supérieure ● bonne concentration en polyphénols - aptitude pour vins de garde ■ prometteur sur le plus qualitatif observations en cours Saône-et-Loire
829 ■ ENTAV 612 ● Saône-et-Loire ▲ 1985	■ Espiguette ● 0,0664 ▲ Avignon	■ supérieure ● moyen ▲ C	■ inférieure ● vins sans caractère particulier ■ potentiel de production très élevé Saône-et-Loire
870 ■ ENTAV 390 ● Mame ▲ 1986	■ Espiguette ● 0,0675 ▲ Dijon	■ supérieure ● inférieur ▲ B	■ supérieure ● vins effervescents classés typés ■ Champagne
871 ■ ENTAV 601 ● Mame ▲ 1988	■ Espiguette ● 0,2030 ▲ Dijon	■ inférieure ● supérieur ▲ B	■ supérieure ● vins effervescents classés standards ■ Champagne

Dijon clone 828 was never legally released in the United States. Rather it was kept in quarantine because it was found to be infected with GLRaV-2RG, a grapevine red globe virus variant (often referred to as LR2RG, GRGV or in common parlance, Red Globe, which is used in this article). Red Globe is one of several virus strains belonging to the family *Closteroviridae* mainly associated with the grapevine leafroll disease complex. This virus influences graft incompatibilities, bunch structure and fruit set. Haeger told me that once Red Globe was discovered at UC Davis, ENTAV retested their mother vines and found they also tested positive for Red Globe so they stopped distribution in France and everywhere else. Before that, 828 had been popular in southern Burgundy in the Maconnais, although it was originally selected for northern Burgundy according to Laurent Audeguin of the French Institute of Vine and Wine.

ENTAV-INRA®

Clone 828

- Origin: Côte d'Or, Burgundy
- Has GLRaV-2 (Red Globe Variant), which can cause graft incompatibilities
- Grafting trials on 12 main NZ rootstocks almost complete, release imminent
- Slightly better set than Clone 943, with medium fertility, small bunches and small to medium berries
- High sugar production, with earlier maturity than some clones
- Generous and full-flavoured with blackberry, plum and good acidity; high polyphenol content



Heager has never found a credible report of real Dijon 828 having been suitcase to North America. “For my money, there is no real 828 in North America until someone can point to vines with a recumbent growth habit that test positive for Red Globe.” Adam Lee, proprietor and winemaker at Siduri Wines in Santa Rosa, California, believes there is something out there in California being touted as true 828, but is unaware of any vines that have been verified as true 828.

True 828 has been brought into Canada through a Canadian nursery from France by Grant Stanley, the winemaker at Quail’s Gate Winery in British Columbia. Adelsheim contacted him for confirmation and Stanley told him that it was a recumbent clone and has low levels of Red Globe. The Dijon 828 clone is blended with other Pinot Noir clones in Quail’s Gate Family Reserve Pinot Noir.

New Zealand has had experience with true clone 828. Several in New Zealand acquired true clone 828 fraudulently and have made single clone wines that reportedly “have shown to be by far the most complete clonal wine in terms of flavor of all the earlier series of Dijon clones” (*Marlborough Winepress*, June 2010). Riversun Nursery, a French licensee, reports that 828 has undergone graft compatibility trials on all the main rootstocks used in New Zealand and has been signed off by ENTAV-INRA® for release. The nursery describes the clone as having medium fertility with small clusters, high sugars and high polyphenol content, good keeping qualities, and smaller bunches than 115 and 777 and slightly less productive (see copy of entry from ENTAV-INRA® above).

In Australia, the Dijon clones are commonly referred to as “Bernard clones,” after Raymond Bernard. 828 was imported in 2008, released from quarantine in Australia in 2010, and will be commercially available in 2015. Nick Dry, who is in charge of Yalumba Nursery in Australia, reports the following characteristics of clone 828: medium to high polyphenols and anthocyanin production, low to medium yield and bunch weight, medium to low berry size, and medium bunch number; wines are balanced, aromatic (intense and fruity), round and full, and have good aging potential.



Pinot Noir

ENTAV-INRA® N° 828

Available exclusively from Yalumba Nursery in 2015

This clone was imported by Yalumba in 2008 and will be released in 2010. It will be available for commercial release in 2015. This clone originates from Côte-d’Or and is mainly used for still wines. It is appreciated for its lower production potential, sugar content and higher polyphenolic content. It has smaller and fewer bunches, and the smallest berry size of the certified ENTAV selection (see table 4).

Wines are often well marked, balanced, aromatic (intense and fruity), round and full. Moreover, it can age a long time. For high quality production, this clone may benefit from blending with clone ENTAV-INRA® N° 777.

Summary

Viticultural characteristics		Composition	
Fertility	Medium	Sugar content	Higher
Bunch size	Lower to Medium	Total acidity	Medium
Berry size	Medium to Lower	Total polyphenols	Medium to Higher
Production potential	Lower to Medium (A)	Anthocyanin content	Medium to Higher



My good friend, David Lloyd, the proprietor and winemaker at Eldridge Estate in the Mornington Peninsula region of Australia sent me a photo of Laurent Audeguin, a Frenchman who developed the Dijon clones after Bernard. David, who calls himself the “clone ranger,” is pouring him a glass of 828!



True Dijon 828 is newly available from the UC Davis FPS Foundation Vineyard this year according to Adelsheim (<http://fpms.ucdavis.edu/WebSitePDFs/Price&VarietyLists/GrapeNewSelectionList.pdf>.) It is a cleaned-up version of the original ENTAV-INRA® clone using micro shoot tip culture, and no longer has the Red Globe virus. True Dijon 828 should be commercially available in California and Oregon within two years.

The Story of Upright “828” Begins with Gary Andrus

Gary Andrus graduated with a degree in organic chemistry from Brigham Young University, became a world-class downhill skier, and competed for the U.S. Olympic team. He obtained a master’s degree from Oregon State University, and a PhD in Oenology from the University of Montpellier in France, followed by work in Bordeaux. Andrus was a partner in a Copper Mountain, Colorado, ski resort, and when he sold his shares, he used the profits in 1978 to found Pine Ridge Winery in Napa Valley in partnership with his wife Nancy.

Andrus was quite fond of Oregon Pinot Noir, and in 1992 he purchased a property in the Dundee Hills of Oregon. The following year, he established Archery Summit Estate on the site, adjacent Domaine Drouhin Oregon, and released the winery’s first vintage of Pinot Noir. A gravity-fed winery with subterranean caves was completed in 1995.

The prestige and visibility of Oregon Pinot Noir was quickly given a boost by Andrus, who pushed for quality and higher prices for Oregon Pinot Noir. He was a driven, competitive and talented winemaker described as “possessing a large, boisterous personality, yet one who became laser focused in the winery,” by long time Oregon wine retailer Jean Yates. Close friend and winemaker associate, Sam Tannahill, who worked under Andrus at Archery Summit from 1995 to 2002, said, “Andrus had winemaking in his DNA.” Tannahill called him “demanding, impetuous, and one who pushed boundaries.” Winemaker Josh Bergström, who was mentored by Andrus, called him “a very complex personality, a bon vivant, and driven businessperson and winemaker.” He was an avid outdoors man, developing a passion for fly fishing while in Oregon, and taught people to respect nature.

Andrus introduced wood fermenters to Oregon which contributed depth, weight and silky textures to Pinot Noir, used whole cluster ferments, and preferred a high concentration of new oak. He produced some of the highest rated and expensive Oregon Pinot Noirs of the time. Within a few years of launching Archery Summit Estate, he released the first Oregon premium Pinot Noir priced at \$100.

Upon his divorce from his spouse Nancy in 2001, Andrus sold his remaining interest in Pine Ridge Winery and Archery Summit Estate and retired from the wine business. Shortly thereafter, he remarried (his third spouse,

Christine, was a former wine sales associate from Colorado), had another child (he had four previous children with his first and second wives), and reemerged with a new winery, Gypsy Dancer Estates, named after his new baby girl Gypsy. The photo below (courtesy of Jean Yates) shows Gary, Gypsy and Christine.



He bought the Lion Valley Vineyards in Cornelius, Oregon, acquired a vineyard and set up a winery in Central Otago, New Zealand (Christine Lorraine Estate), and began to produce Pinot Noir from Central Otago and the Willamette Valley, releasing his first wines from the 2002 vintage from purchased and Estate fruit in 2003 and 2004. Unfortunately, financial challenges ensued and he was forced to abandon Gypsy Dancer Estates in 2006.

Andrus passed away from complications of pneumonia in 2009 at the age of 63. He will always be remembered as a champion of Oregon wine, but one of his important legacies will be the Pinot Noir upright clone “828” which is now widely planted in Oregon and California vineyards. One can only surmise how he might tell the story of the lineage of the vine cutting that he brought into Oregon that become known as “828,” so I have asked numerous winegrowers, winery owners and winemakers who knew Andrus to contribute their first hand knowledge in an attempt to reprise this intriguing bit of history.

Andrus Brings Cuttings from Burgundy into Oregon that Become Known as “828”

There are several reliable accounts that recall when Andrus had bought property in the Dundee Hills and laid the foundation for Archery Summit Estate in 1992-1993, traveled to Burgundy on a number of occasions, and brought illicit Pinot Noir vine cuttings back with him. The urban legend reported by Laurent Montalieu, the spouse of Danielle Andrus-Montalieu, Andrus’ daughter, and Anna Matzinger, the current winemaker at Archery Summit Estate, and others, is that the cuttings were brought back hidden inside a London Fog trench coat.

The cuttings were planted at Archery Summit Estate vineyards. One of the cuttings was found to be superior and was eventually designated AS2 or ASW2. Between 1997 and 2001, cuttings of ASW2 went to Oregon and California sites as well as a nursery in Sonoma County. Soon other nurseries in Oregon and California started growing and selling it as well. Notable Pinot Noir producers in California, and a few in Oregon, bought “828” vines from a nursery in Sonoma. There were no limits on its propagation since it did not come from ENTAV-INRA® in France and was not imported by FPMS in California. At some point ASW2 took on the name “Dijon clone 828,” at a time when the true 828 clone was in quarantine at FPMS in California and at ENTAV-INRA® in France, and had never officially been released to North America due to infestation with Red Globe virus.

The details beyond these accounts become a bit murky and there are various versions of what cultivars Andrus brought to Oregon from France. There are rumors that budwood from at least one suitcased selection other than ASW2, also originating from Archery Summit Estate and presumably either ASW1 or ASW3, was planted

in California. It has been identified as a Pinot fin variety (possibly true 828 or even 115). How ASW2 eventually became known as “Dijon 828” is of great interest but unfortunately no definite clarification is forthcoming.

Ted Lemon, currently the proprietor and winemaker for Littorai in Sebastopol, California, was the original consultant for Archery Summit Estate during its first five years of existence. Lemon laid out the vineyard blocks and chose the rootstock and clonal combinations. He told me the following.

“Gary and I made several trips to France during those days to look at clones and all things Pinot Noir. I made it clear to Gary that I would not participate in any suitcase importations. He did those on his own, although I do know of several trips which I suspect that he brought wood back without telling me. Some of that wood may have been simply grabbed in a famous vineyard and some may have been specific selections. Several selections were planted at Archery Summit including “828” and “La Tache.” In those days, the follow through at Archery Summit may not always have been as complete as one might hope and it is possible, as often happens, that some labeling may have been done incorrectly. Between those issues and virus questions, I believe Archery Summit terminated the program, at least for what Gary called “La Tache.”

“I evaluated the performance of those selections over several years during my work with Archery Summit, and subsequently sourced budwood that would become the Littorai version of the “828” plantings. We call it ‘fake 828.’ I have had several nursery people look at the Littorai version of “828,” including Pierre Marie Guillaume of Guillaume Nursery in France, one of the premier nurserymen in that country. Lucie Morton has also looked at it for us. The CA “828” is a fertile, upright clone, two characteristics that true 828 doesn’t share. Pierre-Marie’s sense was that CA “828” is probably something like ENTAV-INRA® 583, an upright, but quality Pinot Noir clone. Now where Gary grabbed it is a good question. No doubt DNA analysis could reveal the true origin, but I am happy to grow it as CA “828.”

Lemon speculates that when Gary’s selections arrived in the United States, the labels became switched since what was called “La Tache,” was more reminiscent of true 828. This is only educated speculation since no work has been done to verify this.

David Adelsheim, who founded Adelsheim Vineyard in 1972 with his spouse Ginny, is an iconic figure in Oregon wine and a respected spokesperson on Pinot Noir clones in Oregon. A vineyard person who worked at Archery Summit Estate during its founding and establishment was later hired by Adelsheim Vineyard. The vineyardist told Adelsheim the following version of the history of the vine cuttings suitcased into Oregon by Andrus, which differs from Lemon’s account in a few details.

The vineyard person accompanied Andrus on trips to Burgundy where cuttings were taken from a vine in two Domaine de la Romanée-Conti vineyards, Romanée-Conti and La Tâche, as well as Le Musigny. Those cuttings were brought back and propagated at a nursery in Sonoma County, and subsequently planted at Archery Summit. Apparently the Romanée-Conti and Le Musigny vines had serious virus infestation and were eventually discarded. The La Tâche vines either had mild virus issues that were cleaned up at the Sonoma nursery or were clean enough without those measures. The progeny of the La Tâche cutting is now called AS2 or ASW2 and is planted at Archery Summit as well as numerous other Oregon and California vineyards, including Adelsheim Vineyard.

Adelsheim confirms that ASW2 is a Pinot droît selection that grows upright, and in a non hedged vineyard, can easily be distinguished from all other normally used Pinot Noir clones which fall over. It does not have Red Globe virus, and he doubts it ever did have that virus.

Anna Matzinger joined Archery Summit Estate as an assistant winemaker in 1999, and became the winemaker upon the departure of Sam Tannahill in 2002. Leigh Bartholomew is Archery Summit’s viticulturist who is familiar with the winery’s records. Their version of the provenance of ASW2 is as follows. “Urban legend has it that Andrus returned from a trip to France in the mid-1990s with three Pinot Noir cuttings which were propagated in a demonstration vineyard at the winery as well as other estate vineyard sites. The clones made the trans-Atlantic journey sewn into the hem of a London Fog coat. Given that the owner of the coat had a flair for the dramatic, what actually transpired is anyone’s guess. The cuttings were known in-house as ASW1, ASW2, and ASW3. ASW2 was preferred over time and was subsequently sold as budwood. ASW2 has not tested positive for Red Globe.”

Sam Tannahill could not speak to the provenance of “828” (ASW2) at Archery Summit Estate (he said he did not join the winery until 1995 and was not around when the cuttings were secured), but did confirm that it was

upright growing. He reported that a DNA test was performed that confirmed that ASW2 was Pinot Noir (they thought it might be Gamay Beaujalois, another upright selection). When he was the winemaker at Archery Summit, there were four “interesting” clones: “true” 828 (supposedly from Guillaume in France), a La Tâche clone, a Romanée-Conti clone, and a Musigny clone. He is unclear about which, if any, of these clones are still in the ground at Archery Summit Estate. Matzinger told me that Archery Summit Estate currently has about 5 acres of ASW2 out of a total of 110 acres currently in production.

John Haeger has written two well-researched books which have become standard references for reliable information on Pinot Noir, and particularly Pinot Noir clones: *North American Pinot Noir* (2004) and *Pacific Pinot Noir* (2008). In the latter book, he weighs in on the history of Archery Summit Estate and the lineage of ASW2.

Haeger visited Archery Summit Estate in 2000 and talked with Andrus. The ASW designations were not discussed and Haeger had the impression that they did not yet exist. None of the selections were identified to Haeger as 828. Haeger’s discussions several years later with Leigh Bartholomew revealed the ASW designations. Something reportedly from Romanée Conti was designated ASW1; something said to have originated from La Tâche was designated ASW2; and something said to have come from Le Musigny was designated ASW3. Presumably, the AS designations eliminated the need to say what the Burgundian source was for each. The ASW2 proved to have the least virus issues and at some point ASW1 and ASW3, which were heavily infested with viruses during trials at Argyle, were destroyed.

According to Haeger, ASW2 was first established in a demonstration block adjacent the Archery Summit Estate winery, followed by plantings at Block 1 at Renegade Ridge and Block 21 at Red Hills and Looney. “He (Andrus) was not at all circumspect or reticent about the sources of the selections he had personally imported illegally and planted on Renegade Ridge. In fact, that is how Renegade Ridge was named, or at least so Gary said: the spot where he planted the objects of his “renegade” activity. At that time (2000), the selections at Renegade Ridge were known for their sources: La Tâche, La Romanée-Conti and Le Musigny. None of the selections were identified to me as 828.” 828 was not a particularly hot topic at the time and Haeger did not delve deeply into it. Haeger confirms the upright growth habit of ASW2.

Haeger approaches the question of how ASW2 became known as Dijon 828 as follows. “For reasons that are not entirely clear, but apparently stem from conversations Andrus allegedly had with some of the vintners and growers who obtained cuttings, some ASW2, propagated in other vineyards, and redistributed by nurseries, has come to be known as Dijon (or CTPS) 828, even though it almost certainly is not. As this incorrect identity has become clear, some growers have begun to call it faux-828 instead.”

Haeger recalls that Bartholomew found no evidence in the Archery Summit Estate records of any vine cuttings provided to third parties ever identified by Archery Summit Estate, in writing, as 828. “This identification seems to have been made by third parties, though some of these parties say that Andrus told them so. It’s hard for me to believe that Gary actually thought any of his suitcase selections was 828. None of the source vineyards in France were planted to known clones as far as I know.” In deference to that remark, remember that Ted Lemon reported that he believed Andrus grabbed cuttings from both famous vineyards and specific selections.

Adelsheim has bought “828” from Sunridge Nursery in California and planted it side-by-side with ASW2 taken from Archery Summit. They look identical. He plans to make wine from them separately from the 2012 vintage.

The question of how ASW2 became known as “828” will probably never been answered. We know that ASW2 made very respectable wine. Adelsheim notes, “At some point after 2000, he (Andrus) started offering barrel samples of a wine made from “828.” It tasted good. We had no reason to doubt that he had brought it in to the United States in a suitcase.” Dijon clone 828 was not in the United States, but when initially released in France, 828 quickly became a popular clone in Burgundy and received a grade of “A” from its “potentielle de production,” according to Adelsheim. Stateside Pinot Noir producers were alert for the next “hot” Dijon clone (“Make mine Dijon please” was the era’s catch phrase), and reports on 828 from France were enticing.

Matzinger said she does not know exactly how ASW2 became known as “828” but she expressed to me a plausible explanation. “Perhaps Andrus knew it to be 828, thought it to be 828, or simply wanted it to be 828.” Montalieu, like many others I spoke with, reiterated that he had no idea how ASW2 became designated as “828,” but said that 828 was a hot clone in Burgundy at the time, at the forefront you could say, and Andrus could have assumed he had 828. He may have attempted to procure true 828, but unknowingly got something else. Dick Erath told me, “Knowing Gary, he probably thought he had the real thing.” It does not appear that

potential threats from the French deterred Andrus, at least initially, from naming the cuttings he brought into the country illegally. One could speculate that for someone who was intent on building on the visibility of Archery Summit Estate and Oregon Pinot Noir, Andrus may have seen the chance to be the first to have clone 828 as a way of attracting admiration from his colleagues, a feather in his cap so to speak.

Matzinger reports that after Andrus' retirement from Archery Summit Estate in 2001, any budwood sold by Archery Summit Estate was labeled ASW2 and previous purchasers were notified of the name change. Nurseries now list and offer "828" in their catalogues, but clearly inform buyers that it is not the real Dijon 828 clone.

Faux "828" Takes On Other Names and is Characterized

ASW2 has taken on many tags over time. I have already mentioned faux "828," suitcase "828," and CA "828." Some call it the "Viagra clone" because of its upright growth. Others term it the "Don King clone" for the same reason. Joel Myers likes to reference it as the "black dog clone," because it doesn't have the pedigree (not certified) of a Black Labrador Retriever which is a good hunter, but is just as good a producer. It has also been named the "gumboot clone," for obvious reasons.

Winegrowers and winemakers who have worked with faux "828" generally agree it is a good producer and can perform well at sites with marginal climate. Haeger points out that most Pinot droît selections are prolific bearers but the grapes are often of mediocre quality. Jean-Michel Boursiquot, ampelographer and former director of ENTAV, concurs and has said, "The more upright clones are considered to produce inferior wines." Despite these incriminations, some Pinot droît cultivars, including faux "828," have performed well in the United States.

Lemon has described his positive experience with CA "828." "Once it is cleaned up of viruses (what came to Oregon had other viruses besides Red Globe), it is a productive, vigorous vine which performs well under challenging situations like that found in the Sonoma Coast. It tends to produce well and require some thinning. Set is not a sure thing and there can be wide variation from year to year. Color is generally good and it tends to go through veraison late and ripen slightly later than the classic Dijon selections."

Peter Cargassachi, winegrower and winemaker in Sta. Rita Hills, California, said, "The "828" Pinot droît clone produces long, loose clusters and resembles clone Mariafeld UCD 23 which is also a Pinot droît clone."

Jason Drew, of Drew Family Cellars in Elk, Mendocino County, is currently working with two vineyards that have 828 blocks planted, but the two 828 blocks have obviously different morphology and both are planted on 101-14 rootstock. One selection he works with has small berries and small clusters with shy yields. The selection typically provides wine with excellent richness and depth. The other "828", which he is guessing came from Archery Summit, is markedly different concerning the growing stature of the vines. The berries are significantly large and the clusters are sometimes twice the size of the other 828. The vines are more vigorous and grow more erect with significant apical dominance. The wine from this "828" has good intensity but does not have as much tannin and mouth feel as the smaller 828 offers. The more vigorous version is slower to ripen and has nice mature flavors but is more feminine and delicate without the depth that the smaller version has. Jason notes, "I would think about blending the faux 828 if I wanted brighter flavors and lighter tannins. Conversely, I would use the smaller 828 for denser qualities and richer tannin. Ironically, they would make a very nice pair if blended. Then and only then could you call it 'one' 828 instead of two."

In the photos that follow, taken from California and Oregon vineyards just before harvest, the upright growth habit of faux "828" is evident. The clusters are long and large and the upright shoot growth helps keep the clusters hanging free and easily visible. As the clusters take on sugar at the end of harvest, they tend to fall and this is also visible in the photos, particular the photos from Rosella's Vineyard.



ASW2 at Archery Summit Estate, Dundee Hills, courtesy of Anna Metzinger



ASW2 at Archery Summit Estate, Dundee Hills, courtesy of Anna Metzinger



Faux "828" at Inman Family Winery, Olivet Grange Vineyard, Russian River Valley, courtesy of Kathleen Inman



Faux "828," typical giant cluster, 3 days before harvest, Inman Family Winery, Olivet Grange Vineyard, Russian River Valley, courtesy of Kathleen Inman



Faux "828," Rosella's Vineyard, Santa Lucia Highlands, courtesy of Adam Lee

The Wine from Faux “828”

Faux “828,” like many clones, has performed inconsistently depending on the site at which it is planted. As Haeger points out in *North American Pinot Noir*, “So for Pinot Noir, despite all the passion for clones and clonal selection, the mantra remains the old adage about real estate; location, location, location.” Noted winemaker Merry Edwards, upon establishing her Coopersmith Vineyard on the Laguna Ridge near Sebastopol in the Russian River Valley, chose to plant 50% of the former 9.5-acre apple orchard in 2001 to faux “828” clone obtained from Archery Summit Estate. The clone turned out to be a poor match for the terroir, and was converted to Mount Eden UCD 37 by 2008. Only a few miles northeast, faux “828” has proven to be a stalwart clone at Inman Family Wines Olivet Grange Vineyard for Kathleen Inman.

The truth, as expressed by viticulturist Joel Myers, is that with faux “828,” “Some like it and some don’t.” Most agree that it produces intensely flavored wine with very good color. Winemaker Peter Cargasacchi describes his wine from faux “828” grown in the Sta. Rita Hills as being “dark, succulent, with blackberry and dark cherry character.” Chad Melville, winemaker at Melville Vineyards and Winery, also in the Sta. Rita Hills, has faux “828” planted both directly from Archery Summit Estate and Merry Edwards. “They are different visually on the vine and as a wine. The faux “828” is planted in very sandy soil and has a very pretty lifted aromatic profile of dried roses, dried herbs along with an elegant mouth feel. The Merry Edwards 828 is planted in a heavier loam and is darker and richer.”

Eric Hickey is the winemaker at Laetitia Vineyard & Winery in Arroyo Grande Valley which has a little more than 9 acres of an “828” Pinot droït selection planted. He told me, “The Laetitia flavor profile is known for bright red fruit characteristics, but “828” is much more of a dark, black fruited, slightly more tannic Pinot Noir, which is a nice blend to our portfolio. “828” is one of ten Pinot Noir clones that we grow and we release an “828” single clone wine because many of our house wines are blends of these clones and we try to highlight each clone so that patrons can learn what these clones bring to the blends and what they are like when grown at Laetitia.”

Adam Lee, winemaker at Siduri Wines in the Russian River Valley, works with vineyards throughout the state of California and even Oregon, said, “I think it is a bit boring truly. Reminds me of 777 in that it makes a good middle part of the wine but needs stuff around it to make it interesting. Generally, it ripens later than 777, has thicker skins (a bit like Martini in that way, though not quite as extreme), and seems to be finely flavored, but nothing I would recommend anyone plant.”

Stewart Johnson, who farms Kendric Vineyard in Marin County, has faux “828” planted and found it to be the easiest clone to farm because it grew straight up through the trellis wires with little need for shoot positioning. It set a big crop and tended to ripen late. He vinified it separately in the past but “the color was pretty light, it did not show a ton of character, and for me, it was just a filler.” He is not a fan.

Paul Lato, proprietor and winemaker for Paul Lato Wines in Santa Maria Valley only uses “828” in wines for his consulting client, Hilliard Bruce. From his limited experience, he finds the clone simple, lacking in complexity and unexciting. He does not envision himself seeking any vineyards to obtain this clone for himself.

Michael Sullivan, winemaker for Benovia Winery in the Russian River Valley told me the following about faux “828.” “I have worked with the faux “828” and have been more or less happy with the results. It tends to have more structure (more tannin) with higher acid and color than many Dijon selections. That being said, it is not a stand-alone clone but a good blender. I also find that I have to thin the crop heavily with faux “828,” as the clusters are large and the vines can overproduce.”

Most winemakers agree that faux “828” performs best as part of a blend with other clones. For that reason, single clone wines from faux “828” have rarely been released commercially. I know of examples from Buena Vista, Del Dotto, Halleck, Laetitia and Melville Vineyards and Winery in California, and Duke’s Family Vineyards in Oregon. The following two wines were reviewed by me recently. Both wines were pleasant, fruity, and relatively simple with noticeable tannin and short finishes.

2006 Halleck Clone 828 Sonoma Coast Pinot Noir 14.2% alc., 266 cases, \$55. Sourced from a vineyard near Annapolis. Aged in 30% new French oak barrels. *Moderately light reddish-purple color in the glass. Aromas of black cherries, spice and balsam. Flavorful, mid weight, earth-kissed black cherry core with subtle smoky oak in the background, all wrapped in firm tannins, offering a soft mouth feel, and finishing with a cherry-fueled note. Good.*

2009 Laetitia Clone 828 Arroyo Grande Valley Pinot Noir 13.9% alc., \$32. *Medium reddish-purple color in the glass. Opens slowly in the glass, revealing aromas of black cherries, black raspberries, prune, spice and oak. Soft and smooth on the palate, with moderately rich flavors of dark red cherries and berries with a topcoat of toasty oak. Nicely balanced with firm, but well-integrated tannins. Good.*

Summary

- Undocumented grapevines have been brought into the United States from France since the mid-1800s. Noted winemaker, Tony Soter, said in the past, speaking from a California perspective, “Among men and women who consider themselves Grail-seekers of Pinot Noir, it is understood that smuggling is part of the tradition.” In Oregon, because Oregon State University had its own import permit and was willing to bring in anything winegrowers in Oregon wanted, there was virtually no suitcase smuggling of Pinot Noir clones. According to Adelsheim, “I have heard only of the Coury rumor and the Andrus selections; nothing else.”
- Gary Andrus, the founder of Pine Ridge Winery in Napa Valley, Archery Summit Estate in the Willamette Valley, and Gypsy Dancer Estates in Central Otago and the Willamette Valley, smuggled budwood into the United States from France in the early 1990s that purportedly came from famous Burgundian vineyards. The true origins of that budwood will never be known.
- The grapevine cuttings that Andrus brought in, sewn into a London Fog coat as urban legend would have it, were propagated at Archery Summery Estate. One particular cutting, termed ASW2, proved to be the best performer and the least virused. It was a Pinot droït variety that produced good wine.
- Beginning in 1997, cuttings from ASW2 were widely distributed to wineries and nurseries throughout Oregon and California. Since the selection was not certified, there were no restrictions on its propagation. At some point, and for reasons that remain a mystery, ASW2 became known as clone “828.” The true Dijon clone 828 was quarantined in France and at UC Davis because of Red Globe virus. ASW2 never tested positive for Red Globe virus.
- True Dijon 828 is newly available from the UC Davis FPS Foundation Vineyard this year. It is a cleaned-up version of the original ENTAV-INRA clone, and no longer has the Red Globe virus. Since 2001 when Andrus sold his interest in Archery Summit Estate, all budwood sold from that source is labeled ASW2 to distinguish it from “828” and buyers are notified of the name change.
- Currently, the viticulture trade refers to ASW2 as faux “828” or upright “828.” It will be of interest going forward to see what ASW2 will be called as true 828 becomes available in the United States.

Postscript

Laurent Deluc, Assistant Professor in the Department of Horticulture at Oregon State University (OSU), is currently undertaking long-term projects to sequence several Pinot Noir clones, working collaboratively with the Center for Genomic and Research Biocomputing facilities at OSU. Currently, OSU has the laboratory workflow and the bioinformatics platform to analyze expression data using RNA Sequence technology. It is hoped that ASW2 can be integrated into this large initiative to fully map several Pinot Noir clones. This would, of course, reveal the true origin of ASW2. Stay tuned.

Appendix

The word clone is from the Greek word for twig. Clones are separate vines that are genetically identical to a mother plant. They have the same growth, habit, flavors and ripening time as the vine they come from. Clones are propagated asexually by taking cuttings or grafts from another vine. Seeds are not suitable for propagation since after pollination, new seeds are not genetically identical.

The clone of Pinot Noir will determine the flavor profile of the resulting wine along with the effects of terroir such as soil and microclimate. Clones will have differences in bud break, time of ripening, cluster architecture, yields, size of berries, fruit quality and other characteristics.

Clones are registered by FPS at UC Davis and certified by ENTAV (Etablissement National Technique pour l'Amélioration de la Viticulture) in southern France. A certified clone is propagated from the same parent plant, tested for specific viruses, and kept clean. These certified cloned vines are then named or numbered and propagated on site and cuttings made available to nurseries.

Cuttings taken from different vines that do not have a common parent and thus have a diverse genetic heritage are referred to as selection massale or mass selection, or simply selection. For example, none of the so-called heritage or suitcase "clones" of Pinot Noir planted in California are truly clones. They originally represented multiple cuttings taken from several vines in a vineyard and thus represent a cultivar or selection. An example is the so-called Swan "clone" of Pinot Noir which technically should be termed the Swan selection. The Swan selection was brought to the United States by Paul Masson who reportedly took budwood from Romanée-Conti and planted it in Saratoga, California. His successor, Martin Ray, planted a new vineyard with cuttings taken from Masson's vineyard at what became known as Mount Eden. Joseph Swan, in turn, took cuttings from Martin Ray's vineyard, planted them in the Russian River Valley, where over time others took Swan's budwood and propagated them throughout California.